

Setting up Your User Profile

Overview

Use this instruction guide to set up your User Profile in myUF Market with information saved for use later when completing a cart or requisition. This saves you from retyping items into carts, such as your Shipping address, PO Business Unit, Billing address, ChartField information and ChartField String Favorites. Set this information as default, to automatically display in each cart. Set up e-mail notifications to be notified by e-mail during the processing of your order. E-mail notifications contain additional information such as cart name, ID number and who submitted the cart. This will help alert you to the status of your orders.

Navigation

Paragraph Text

1. Action Item **Bold and Blue**.
2. Click on **Main Menu**.

Heading

Subheading

Paragraph Text

1. Action Item **Bold and Blue**.
2. Click on **Main Menu**.

Heading

Paragraph Text

- Bullet 1
- Bullet 2

Access myUF Market by navigating to <http://my.ufl.edu/> and logging in with your Gatorlink username and password, and navigate to:

- a. **Click Nav bar > Main Menu > My Self Service > myUF Market** for UF_N_MKT_Shopper role
- b. **Click Nav bar > Main Menu > Financials > eProcurement > myUF Market** for the UF_N_MKT_Shopper_Req role (to shop only), the UF_N_MKT_Requestor and

UF_N_MKT_Financial_Approver roles.

Setting up Ship To

1. On the Menu Bar, click **Your Name** to access a flyout menu > in the flyout menu click **View My Profile**.
2. In the My Profile screen, click **Default User Settings > Default Addresses**.
3. Click the **Select Addresses for Profile** button on the top right-hand side.
 - a. An Address Search box displays.
 - b. Enter the Nick Name of the building, for example, "Library West".
 - c. Click the **Search** button.
4. If the address you seek is listed, click the option button beside the appropriate address.
5. If you don't find your Ship To, try these additional search tips:
 - a. Try using the asterisk * as a wildcard, such as *Rogers* to find Frazier-Rogers Hall.
 - b. Use your address in the Address Text field, for example, "Belle Glade".
 - c. E-mail procurement@ufl.edu that you are having trouble locating your Ship To address and include the name of your building, your department and your college.
6. The result displays the following for editing.
 - a. The building Nick Name – which you may change in your profile
 - b. Check the box next to Default if you would like the system to auto populate the Ship To section of the requisition each time with this address
 - c. Your name – you may enter a different one for shipping purposes
 - d. Building and Room
 - e. Shipping address
7. Click the **Save** button.

Setting up Bill To

1. Click the **Bill To** tab at the top of the Default Addresses window.
2. Click the **Select Addresses for Profile** button on the top right-hand side.
 - a. An Address Search box displays.
 - b. Enter the Nick Name of the unit or Department name.
 - c. Click the **Search** button.
3. If the address you seek is listed, click the option button beside the appropriate address.
4. If you don't find your Bill To, try these additional search tips:
 - a. Try PO Box or city in the **Address** field instead try using the asterisk * as a wildcard, such as *115250* to find PO Box 115250, and enter into the **Address Text** field.
 - b. E-mail procurement@ufl.edu that you are having trouble locating your Bill To address and include the name of your building, your department and your college.

5. The result displays the following for editing.
 - a. The unit or department Nick Name.
Tip: [Check the box next to Default if you would like the system to auto populate the Ship To section of the requisition each time with this address.]
 - b. Your name--you may enter a different one for billing purposes.
 - c. Building and Room.
 - d. Billing address.
6. Click the **Save** button.

Optional - Setting Up Distribute By (for Requestors)

1. In the My Profile screen, click **Default User Settings > Custom Field and Accounting Code Defaults**.
2. Under the Header tab, click the **Edit** button under Edit Values.
 - a. Click the Create New Value button.
 - b. Check the box next to Amount, for example
 - c. Click the **Add Values** button.
 - d. To set as default, click the link of the saved value or amount.
 - e. Check the default checkbox and then click **Save**.

For a more detailed explanation of when to select Quantity or Amount, please refer to the Shopping With a Form for Service instruction guide and Completing a Requisition – Splitting a Distribution.

Setting Up PO Business Unit and ChartFields

1. In the My Profile screen, click **Default User Settings > Custom Field and Accounting Code Defaults** then click the **Code Favorites** tab to set up and save ChartField strings for use in requisitions. See the instruction guide, "[Using ChartField String Favorites](#)" for information on this process.
2. In the My Profile screen, click **Default User Settings > Custom Field and Accounting Code Defaults** then click the **Codes** tab to set up and save individual ChartField values.
3. The page displays all ChartFields including the PO Business Unit on the left.
4. To add a default value, click the **Edit** button on the right for the selected ChartField.
 - a. Only edit the ones you choose--even if it is just one.
 - b. Click the **Create a New Value** button and the system displays a Search box to search for the values you need. For example, you may click Edit for Account Code; click Create New Value; enter a keyword in Description to search by, such as "Lab"; check the one(s) you use often to add to a dropdown to use later.
 - c. Click the **Add Values** button after checking your selections.
 - d. The system will add the ones selected to the menu on the left for easy access within the requisition.
 - e. To select a default value that will auto populate, click a value to select it from the saved list.
 - f. In the **Edit Existing Value** box, check the Default box for this value.
 - g. Click the **Save** button.

Setting PCard as Default Payment Option

Note: To use your PCard in myUF Market, it must be added to your profile by the PCard Team in Procurement Services. After logging in at least once, go to <https://www.fa.ufl.edu/apps/purchasing/market/> and click the myUF Market icon. Enter

your information to request your PCard added to your profile.

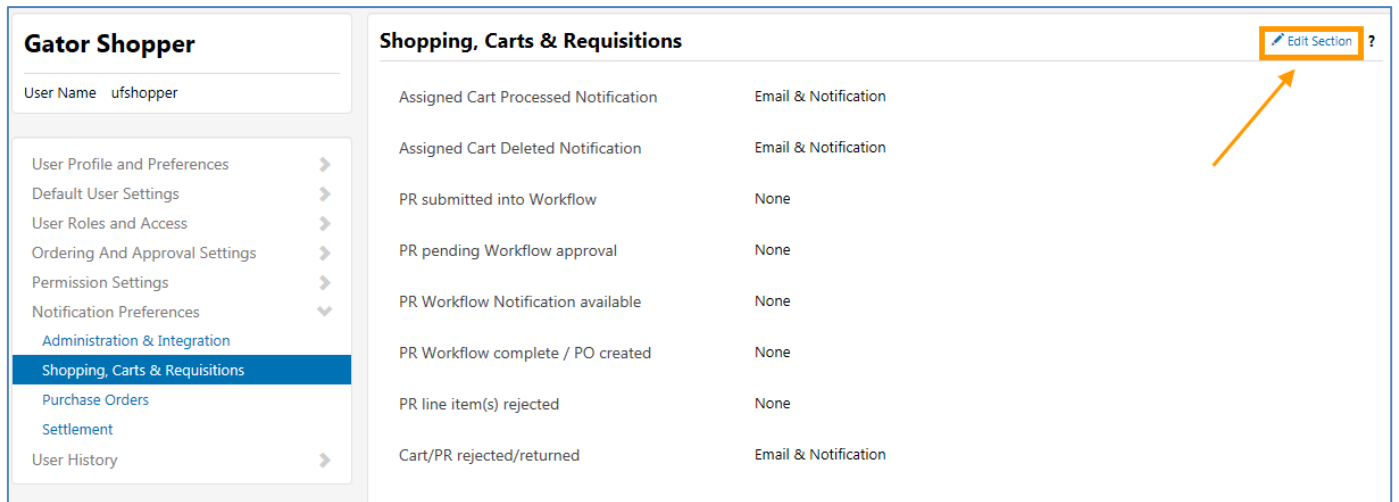
- ▶ Otherwise, the PCard will be a payment option with option to assign to each requisition.

Setting Up Default Cart Assignees

1. In the My Profile screen, click **Default User Settings > Cart Assignees**.
2. Click the **Add Assignee...** button to search for requestors and add to the list by clicking the Select link by the requestor’s name in the Search results.
3. Click the **Set as Preferred** button to have an assignee as a default assignee.
4. Now you will not have to search for a requestor every time you need to assign a shopping cart.

E-mail Notifications

1. In the My Profile screen, click **Notification Preferences**, then click Shopping Carts and Requisitions.
2. The menu displays a list of notification categories that have default preferences based on your user role or the results of selections you have made.
3. You may change your notification preferences and override the automatic selections.
 - ▶ Click the **Edit Section** link in the top right of this window. Select the **Override** radio button to make a change. A dropdown menu with the following options will display: None, Email, Notification, and Email & Notification. Click on your selection and click the **Save Changes** button at the bottom. You may also set these up for Purchase Orders.



Gator Shopper

User Name ufshopper

- User Profile and Preferences >
- Default User Settings >
- User Roles and Access >
- Ordering And Approval Settings >
- Permission Settings >
- Notification Preferences >
- Administration & Integration
- Shopping, Carts & Requisitions
- Purchase Orders
- Settlement
- User History >

Shopping, Carts & Requisitions ?

Assigned Cart Processed Notification	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Assigned Cart Deleted Notification	<input type="radio"/> Default <input checked="" type="radio"/> Override	Email & Notification
PR submitted into Workflow	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR pending Workflow approval	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR Workflow Notification available	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR Workflow complete / PO created	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR line item(s) rejected	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Cart/PR rejected/returned	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification

Save Changes
Cancel

For further assistance, e-mail procurement@ufl.edu or contact the Procurement Services Help Desk at 392-1335 or visit <http://purchasing.ufl.edu/departments/myufmarket/default.asp>.