Functions to Refine Carts Continued…

Creating a Personal Values List

The Personal Value List (PVL) allows users to save information they use frequently in an easy-to-use list. This makes it easier to find the values for repeated uses. The values that can be stored in the Personal Values List include: Supplier ID, Unit of Measure, and Material Group.

Supplier ID PVL

1. On the Create Shopping Cart screen, click in the Supplier ID column and select the search button.

2. In the resulting search box, enter a portion of the supplier’s name in the second field on the Name 1/last name line and click the Search button. Remember to use asterisks (*) as text wild cards.

3. When you find the desired item in the subsequent list, right click on the line and select Add to Personal Value List.
Functions to Refine Carts Continued…

4. Returning to the **Create Shopping Cart** screen, select the search button again in the Supplier ID field. This action will open a box that contains the PVL you have created. Select the line of the Supplier you wish to use.

5. In subsequent visits, you may wish to search for values beyond your PVL. To access the search, select the **All Values** link.

*Note:* To add more Supplier IDs to your PVL, search for new values as outlined above.
Functions to Refine Carts Continued…

Unit of Measure PVL

1. On the Create Shopping Cart screen, click in the UoM column and click on the search button.

2. In the resulting search box, click the Search button.

3. When you find the desired unit of measure in the subsequent list, right click on the line and select Add to Personal Value List.

4. Returning to the Create Shopping Cart screen, select the search button again in the UoM field. This action will open a box that contains the PVL you have created. Select the UoM you wish to use.
Functions to Refine Carts Continued…

5. In subsequent visits, you may wish to search for values beyond your PVL. To access the search, select the **All Values** link.

![Image of search interface]

**Note:** To add more UoMs to your PVL, search for new values as outlined above.
Functions to Refine Carts Continued…

**Material Group**

1. On the Create Shopping Cart screen, click in the MatGrp column and click on the search button.

2. In the resulting search box, click the **Start Search** button.

3. In the resulting **Search Material Group** list, search for the Material Groups designated by your department for the items you order. If Material Groups have not been designated, select the most appropriate designation from the first nineteen groups listed alphabetically and numbered 001-019. When you find the preferred Material Group, highlight the line and click the **Add to Personal Value List** button. Select **Cancel** after receiving the message the item has been added.
Functions to Refine Carts Continued...

4. Returning to the Create Shopping Cart screen, select the search button again in the MatlGrp field. This action will open a box that contains the PVL you have created. Select the line with the Material Group you wish to use. Select **OK**.

![Image of search material group]

5. In subsequent visits, you may wish to search for values beyond your PVL. To access the search, select the **Go to General Values** link.

![Image of search material group]

**Note:** To add more Material Groups to your PVL, search for new values as outlined above.