Topics

- Parent/Child account for MD numbers
- Change the default funding on MD numbers
- Create MDS transaction reports
- Create reports about carts, orders, and invoices
Parent/Child Accounts

• One login to access many MD accounts for shopping and monitoring activity
• Call customer service to set up; 608-497-4400
• Additional information
  – http://www.bussvc.wisc.edu/shopuw/faq.html#parentChild
Parent/Child Accounts (cont.)

• Account Entry
Parent/Child Accounts (cont.)

- Access many MD accounts from one screen
- Linked to Shop@UW Store Lobby
  – Use the “Back to Account List” link on Store Lobby to return to Parent/Child Account Entry
Default Funding Overview

• Reasons to change default funding on the MD account default
  – Expired grant/project
  – Need a change for future purchases
  – Assign a different department ID

• Attention: It is not practical to make several changes during the day
Change Default Funding

• See the link at Shop@UW Tools
  – Default Funding Overview
    • http://www.bussvc.wisc.edu/shopuw/DefaultFunding/FundingUpdate.html
  – Use the MD Account Setup & Revision form to update an MD account
    • http://www.bussvc.wisc.edu/shopuw/account.html
  – Review alternative methods for changing funding after a purchase
    • http://www.bussvc.wisc.edu/shopuw/tools.html
MDS Transaction Reports

- Download and print reports
  - From the Parent/Child Account Entry
  - Invoice Transaction link at Store Lobby
Shop@UW Document Search

• Find the “History” icon and select the “Search Documents” option
Shop@UW Document Search (cont.)

- Simple search is the default
- Advanced search provides more options
Document Search Export Report Data

• Create a custom template for reports to use again and again

• Click on the “Create and Manage Export Templates” link
  – *Hint:* Create the template *before* doing the document search
Create Export Templates

• Use the “Create Template for...” dropdown
• For this example, the “Invoices” option is selected
Create Export Templates (cont.)

• Select these options for the template:
  – How do you want your custom export file?
    • All in one file
  – Which Custom Fields do you want?
    • Let me choose
Create Export Templates (cont.)

- Customize the export report
- Select from the list of System Fields
- Templates are always editable
Create Export Template (cont.)

- Enter a name for the template and “Save”
- Find the template at “Create and Manage Export Templates”
Shop@UW Document Search

• Use the Advanced search option:
  – History > Document Search > Search Documents

• Choose Carts, Orders, or Invoices

• Enter the criteria for the search results
  – Item SKU, date range, amount, supplier, etc.

• Click on “Go”
Document Search Report Export

- Use the “Save New Search” button if you want to save the search
- Click on the “Export Search” button if you want to review a report
Document Search Report Export (cont.)

• Select an option from the dropdown at “Request Export Template”

• For the default report, use “Full Export”
  – Default search report
  – Report contains all system data
Document Search Report Export (cont.)

- Select the custom template
  - Find the template at the “Request Export Template” dropdown
  - **Option:** Use the customize checkbox to change system fields in the report
Download Export Files

- Find the report in History > Document Search and select “Download Export Files”
- The export file is XXX.zip
- If using the default export option, select the largest file from the list
Questions???

• Email me at janet.deutsch@wisc.edu
• Contact Shop@UW customer service
Resources

• Shop@UW Tutorial Index
  – Download PDF’s
  – Watch video

• Shop@UW FAQ
Shop@UW Contacts

• Shop@UW customer service
  – Phone 608-497-4400
  – Email shopuw@bussvc.wisc.edu

• Shopper Feedback Form
  – http://www.bussvc.wisc.edu/shopuw/shopperfeedback.html