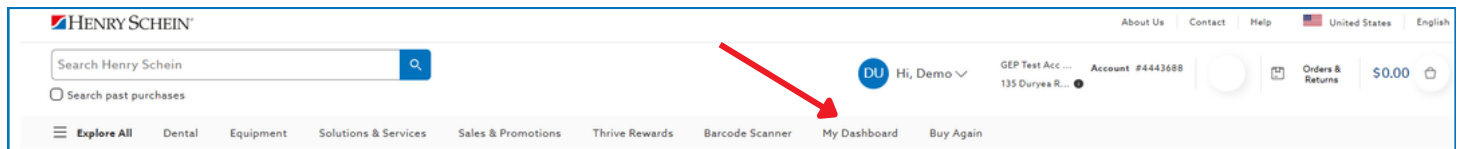


Shopping Lists & Favorites

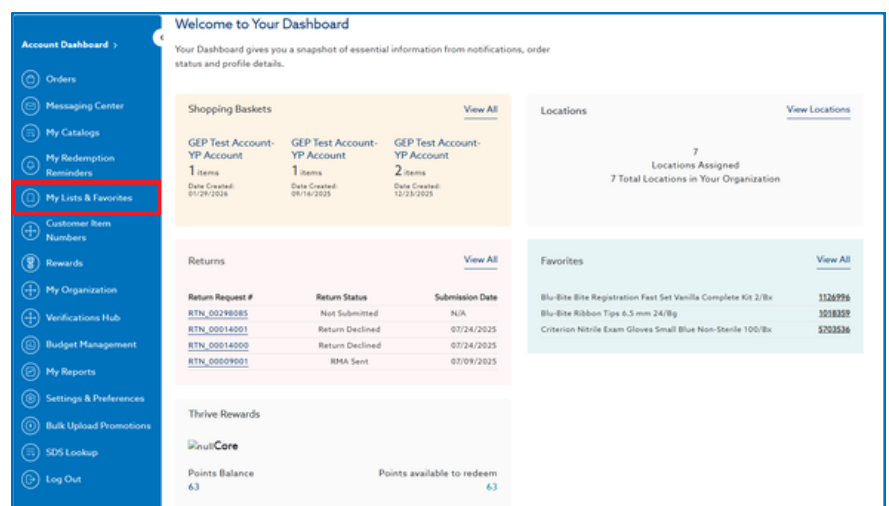
A quick guide on how to create and edit shopping lists and favorites.

01 How to Find Shopping Lists & Favorites

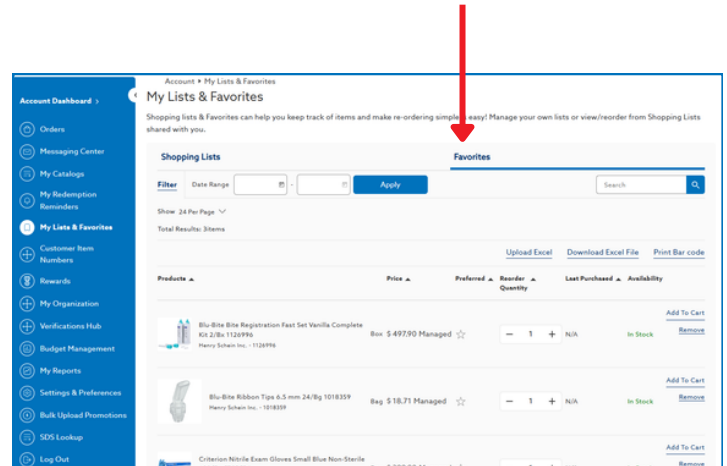
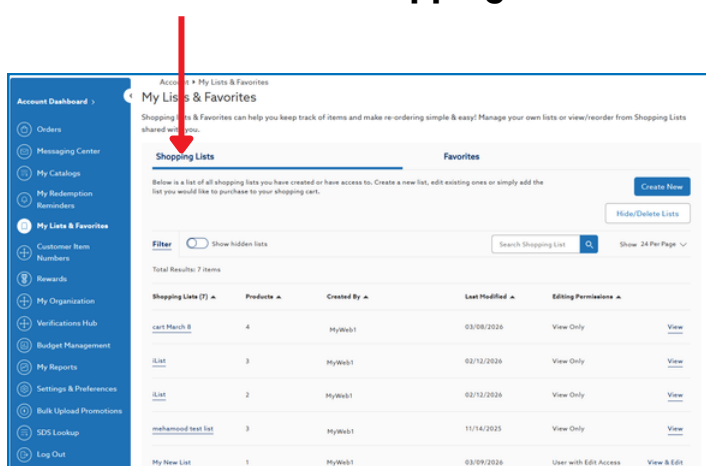
- After logging in, click **My Dashboard**.



- Click on **My Lists & Favorites**.



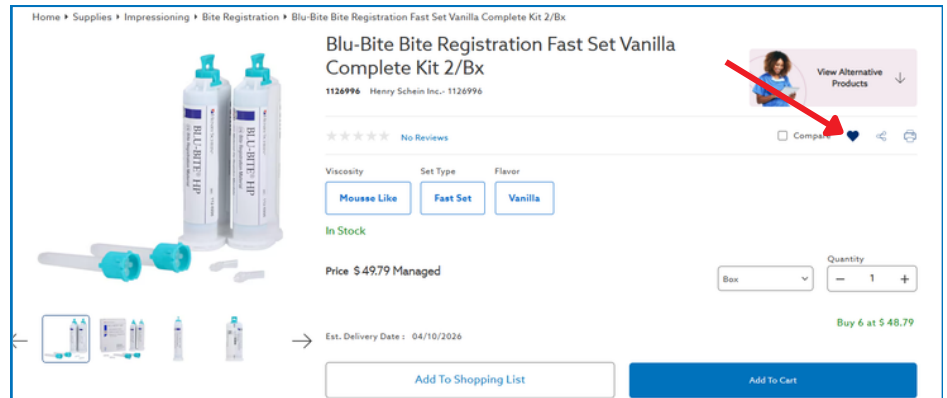
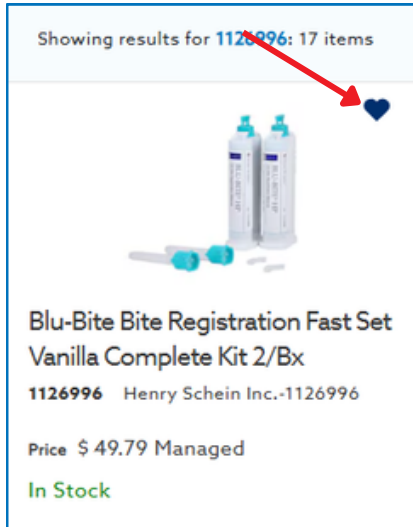
- There is a tab for **Shopping Lists** and a tab for **Favorites**.



02

How to Add an Item as a Favorite

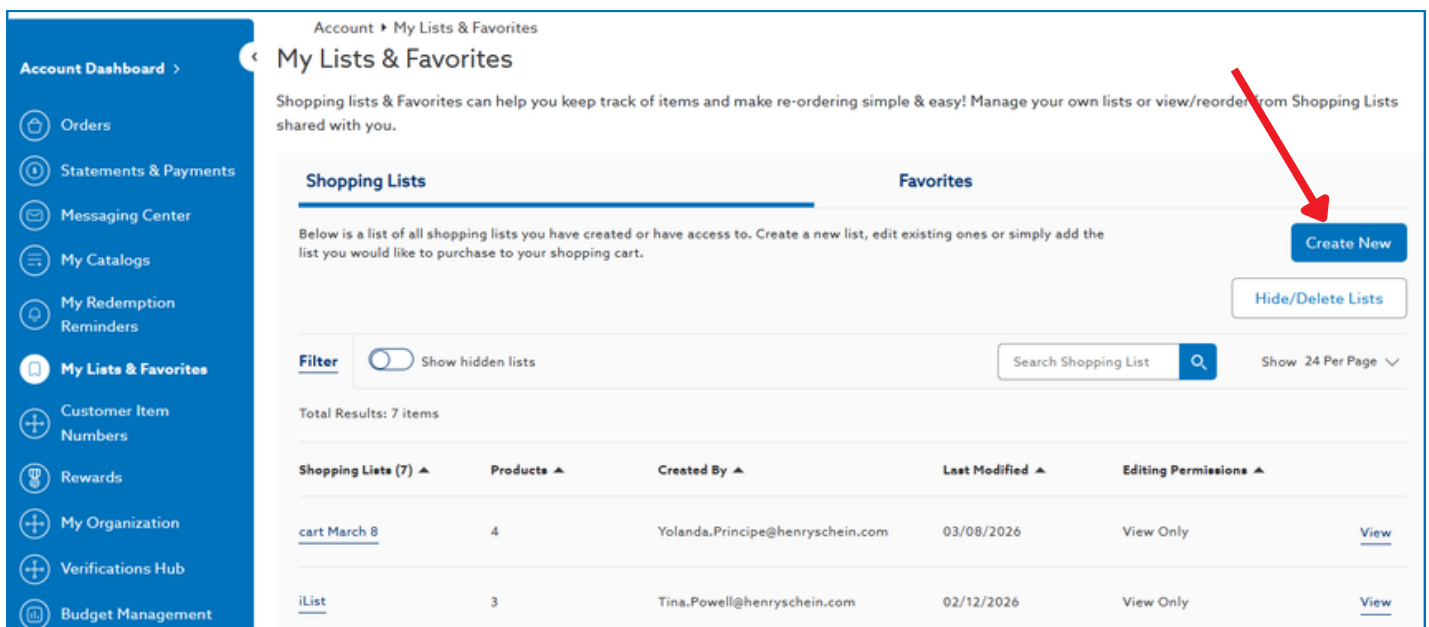
- Use the global search bar to find an item.
- Click the heart icon next to the item. This will add the item to your favorites list.



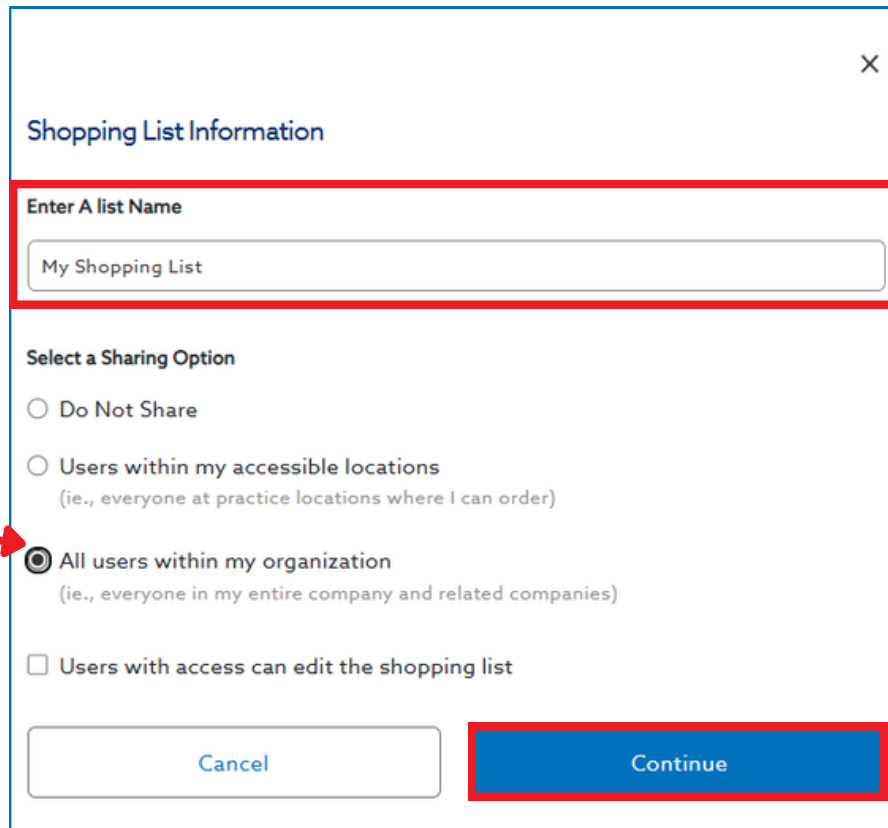
03

How to Create a Shopping List

- After logging in, click **My Dashboard**.
- Click **My Lists & Favorites**.
- Click **Create New**.



- Type a **title** for your list.
- Select **Share Options**.
 - If you want users that have access to this list to also be able to edit check the Users with access can edit the shopping list box..
- Click **Continue**.



Shopping List Information

Enter A list Name

My Shopping List

Select a Sharing Option

☐ Do Not Share

☐ Users within my accessible locations
(ie., everyone at practice locations where I can order)

☒ All users within my organization
(ie., everyone in my entire company and related companies)

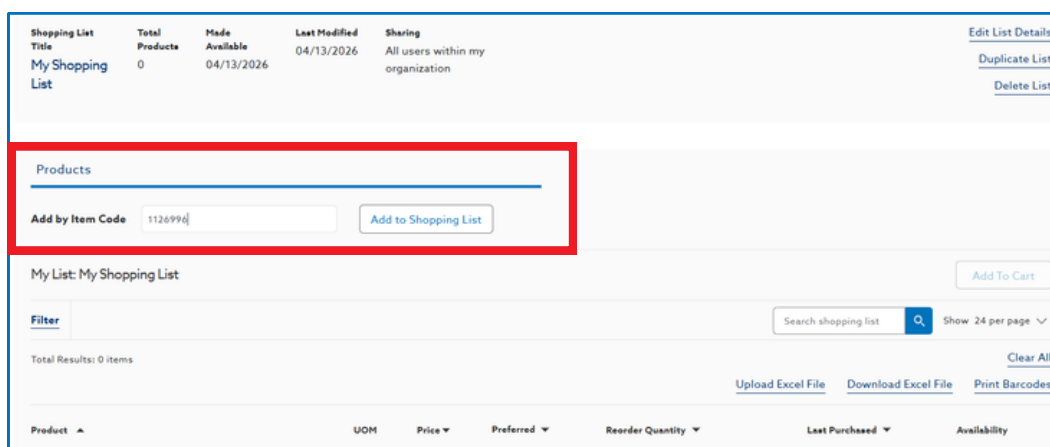
☐ Users with access can edit the shopping list

Cancel Continue

- The new list page will populate.
- There are a few options to add items to the shopping list.

Option 1: From the Shopping List Page

- Type item number in **Add by Item Code** field.
- Click **Add to Shopping List**.



Shopping List Title	Total Products	Made Available	Last Modified	Sharing
My Shopping List	0	04/13/2026	04/13/2026	All users within my organization

Products

Add by Item Code: 1126996 Add to Shopping List

My List: My Shopping List

Filter Search shopping list Show 24 per page

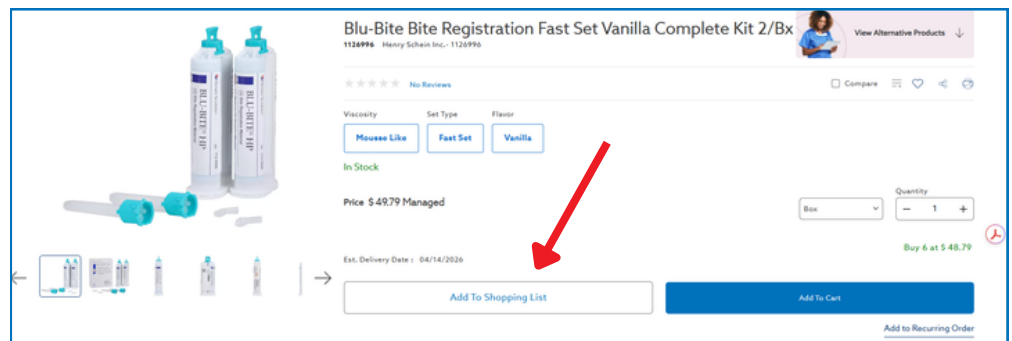
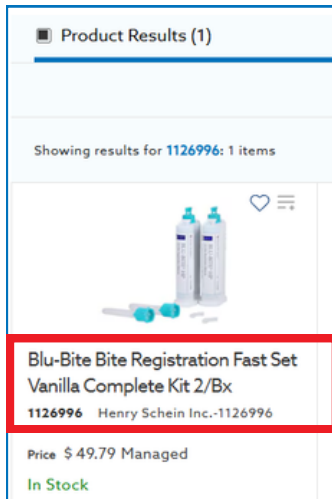
Total Results: 0 items

Upload Excel File Download Excel File Print Barcodes

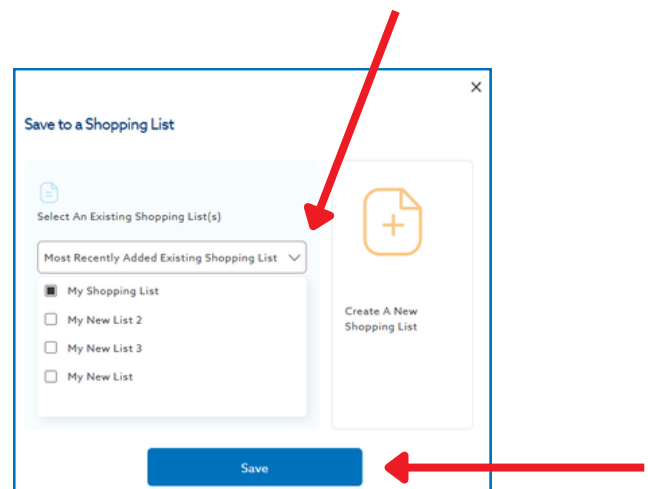
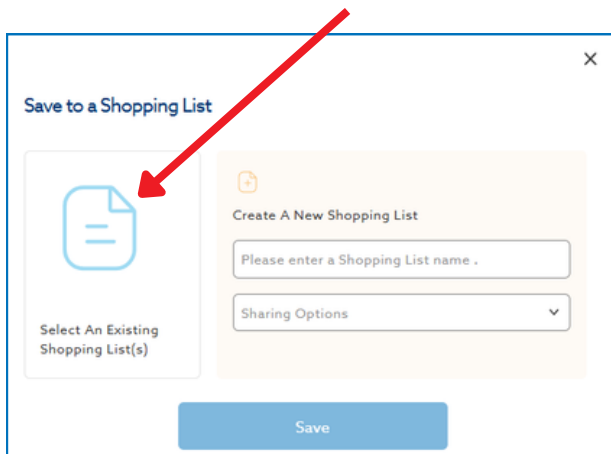
Product UOM Price Preferred Reorder Quantity Last Purchased Availability

Option 2: From the Item Information Screen

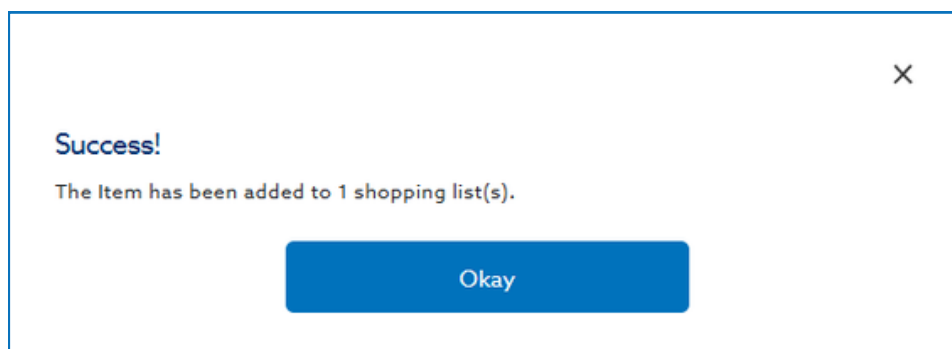
- Use the global search bar to find an item.
- Click on the **item name** from the results screen. This will open the item information screen.
- Click **Add to Shopping List**.



- Click **Select An Existing Shopping List(s)**.
- Click the dropdown list to see all shopping lists
- Select the shopping list(s).
- Click **Save**.

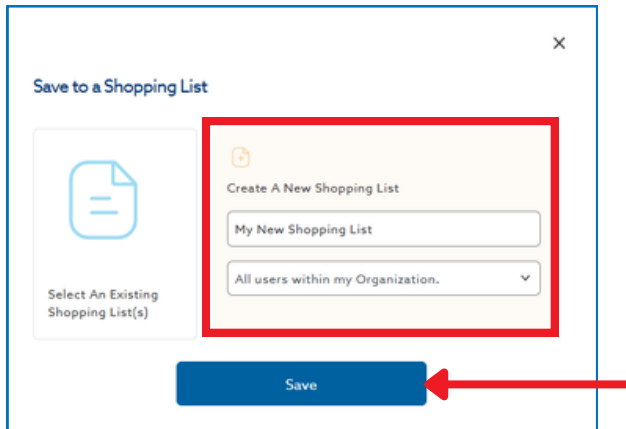


- A Success message will populate.



Additionally, you can also create a new shopping list

- Type Title for shopping list.
- Click the dropdown and select sharing options.
- Click **Save**.
- A green success message will populate.



Save to a Shopping List

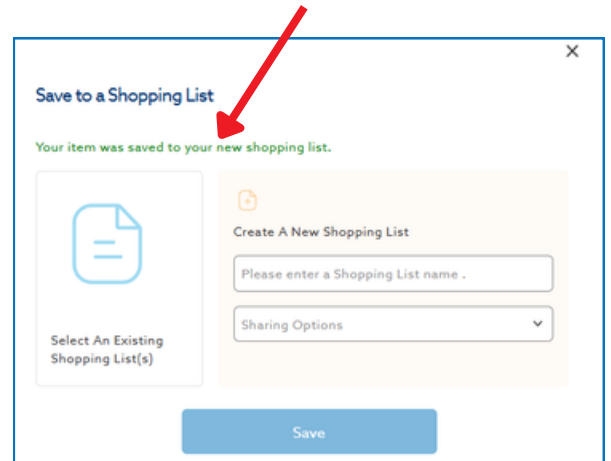
Select An Existing Shopping List(s)

Create A New Shopping List

My New Shopping List

All users within my Organization.

Save



Save to a Shopping List

Your item was saved to your new shopping list.

Select An Existing Shopping List(s)

Create A New Shopping List

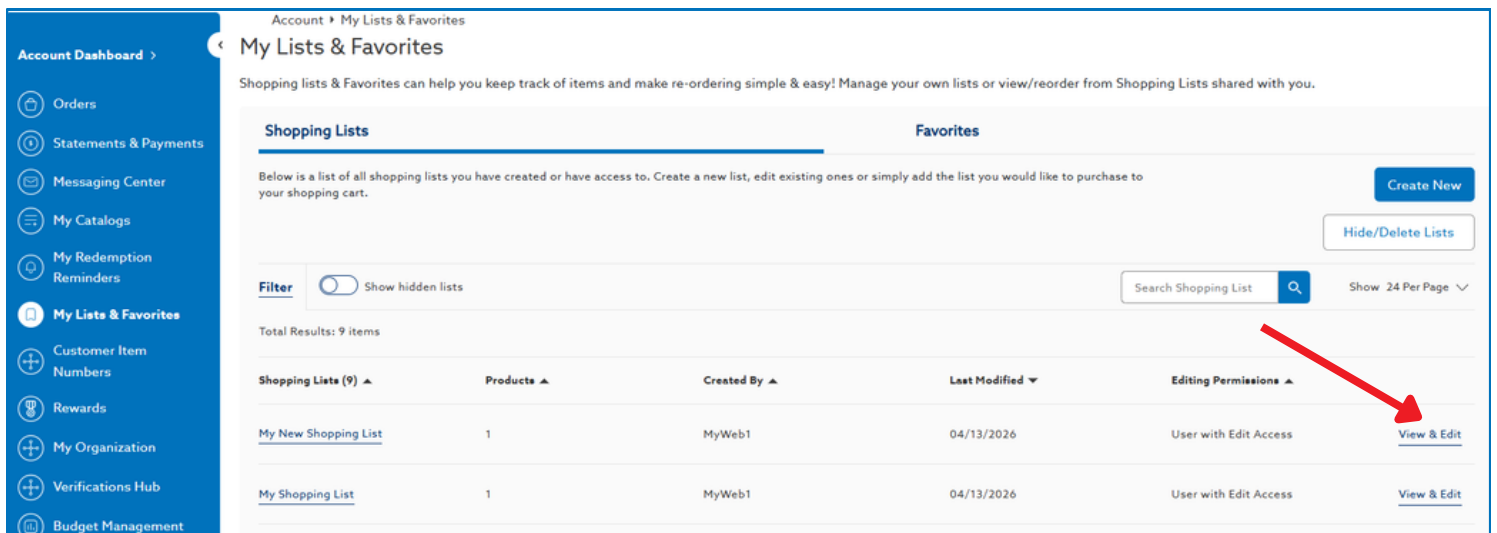
Please enter a Shopping List name .

Sharing Options

Save

Option 3: From a Spreadsheet

- Click **My Dashboard**.
- Click **My Lists & Favorites**.
- Click **View & Edit** next to the list you need to add items to.



Account > My Lists & Favorites

My Lists & Favorites

Shopping lists & Favorites can help you keep track of items and make re-ordering simple & easy! Manage your own lists or view/reorder from Shopping Lists shared with you.

Shopping Lists Favorites

Below is a list of all shopping lists you have created or have access to. Create a new list, edit existing ones or simply add the list you would like to purchase to your shopping cart.

Create New

Hide/Delete Lists

Filter ☐ Show hidden lists

Search Shopping List

Show 24 Per Page

Total Results: 9 items

Shopping Lists (9) ▲	Products ▲	Created By ▲	Last Modified ▼	Editing Permissions ▲
My New Shopping List	1	MyWeb1	04/13/2026	User with Edit Access View & Edit
My Shopping List	1	MyWeb1	04/13/2026	User with Edit Access View & Edit

- Click **Download Excel File**.
- Complete spreadsheet.
- Click **Upload Excel File**.

Shopping List Title: My New Shopping List

Total Products: 1

Made Available: 04/13/2026

Last Modified: 04/13/2026

Sharing: All users within my organization

Products

Add by Item Code: Item code goes here Add to Shopping List

My List: My New Shopping List Add To Cart

Filter Search shopping list Show 24 per page

Total Results: 1 items

[Upload Excel File](#) [Download Excel File](#) [Print Barcodes](#)

Product UOM Price Preferred Reorder Quantity Last Purchased Availability

- Click **Browse For File**.
- Select file to upload, click **Open**.
- A message will populate detailing any exceptions to the upload.
- Click **Continue**.

Upload Items To The My New Shopping List Shopping List

Choose the Shopping List Template you wish to use to add/edit items to your Shopping List.

[Download The .CSV Shopping List Template](#)

[Browse For File](#)

Success!

Your file has uploaded successfully.

"Test List 6.xlsx" 8.48kb

[Continue](#)