Manage favorite local resources

Last updated: Mon, 03 Dec 2018 13:43:56 GMT

Discover how to use the Add Item drop-down menu to add and remove frequently used local resources in WorldShare Acquisitions.
You can add local resources that are frequently added to invoice items (e.g., postage) to the Add Item drop-down menu.

Note:
- Favorites are user-based, not institution-based.
- You can add up to five favorite local resources

Add a favorite local resource

1. From the Add Item drop-down menu on the invoice page, select Manage Favorites.
2. From the Manage Favorites dialog, enter the name of the local resource you want to add as a favorite. As you type, the system automatically suggests names of potential matches.
3. Select the local resource from the drop-down list.
4. Select an item type from the Invoice Item Type drop-down list.
5. Click Add. The local resource appears in the Favorites table.
6. Click Close to return to the invoice screen.

Remove a favorite local resource

1. From the Add Item drop-down menu on the invoice page, select Manage Favorites.
2. From the Manage Favorites dialog, locate the local resource you want to remove and click the Remove button (🗑).
3. Click Close to return to the invoice screen.