

From the home Shopping Dashboard, you can access your profile by selecting your name in the red banner area at the top right of the page, then clicking View My Profile.

Randy	Requisitioner 🔹 🚖 Action Items 1 Notifications 19
Rai	ndy Requisitioner
Viev	w My Profile
Set	My Home Page
Log	out
My	Recently Completed Requisitions
My	Recently Completed Purchase Orders

Custom Field and Accounting Codes

1. Under the Default User Codes Section, select the link for Custom Field and Accounting Code Defaults.

User Name randy_requisitioner	Header (ext.)	Codes	Code Favorites	Internal Inform	nation		
User Profile and Preferences		Custom I	ield Na	me De	fault Value	Description	Edit Valu
User Profile and Preferences		Form Field Serial Number			No Default Value No Default Value		Edit Edit
Default Addresses							
Cart Assignees							
Checkout Settings							
User Roles and Access	->						
Ordering And Approval Settings	>						
Permission Settings	>						
Notification Preferences	>						
Llear History							

(Continued on next page)

2. Select the Codes Tab. A listing of the available custom fields and whether any defaults values currently exist will display. Select the Edit button to the right of a custom field's line to change it.

	Header (ext Codes ode Favorites Internal Information					
	Custom Field Name	Default Value	Description	Edit Values		
- Ú	Acct Dist Shortcut	No Defau	It Value	Edit		
faults	L BU	No Defau	It Value	Edit		
	L A/U	No Defau	It Value	Edit		
	L Account	No Defau	It Value	Edit		
	L Org	No Defau	lt Value	Edit		
->	L Fund	No Defau	lt Value	Edit		
>	L Activity	No Defau	It Value	Edit		
->	└ Project	No Defau	lt Value	Edit		
>						
	s faults s s s	Header (ext Code: ode Fa Custom Field Name Acct Dist Shortcut L BU L A/U L Account L Org Fund Activity L Project	Custom Field Name Default Value Acct Dist Shortcut No Defau - BU No Defau - A/U No Defau - Account No Defau - Org No Defau - Fund No Defau - Fund No Defau - Project No Defau	Header (ext Code: rode Favorites Internal Information Custom Field Name Default Value Description Acct Dist Shortcut No Default Value - - BU No Default Value - - A/U No Default Value - - Account No Default Value - - Org No Default Value - - Fund No Default Value - - Activity No Default Value - - Project No Default Value -		

3. Review any custom field values currently listed in your profile. (None in this example.) Select the Create New Value button to add a new custom field value.

Header (ext.)	Codes	Code Fa	vorites Inte	rnal Infor	mation	
Custom	Field Na	me	Default V	alue	Description	Edit Values
Acct Dist Sho	ortcut			No Defau	ult Value	Edit
Value	Descr	iption		^		
Value	Descr	iption		< >		

(Continued on next page)

- **4.** You will see a list of available values or a Search Box.
 - 1. If the value you need to add is not available,
 - 2. Enter the search criteria.
 - 3. Click the Search button.

Header (ext.) Codes Co	de Favorites Internal Inf	ormation	
Custom Field Name	Default Value	Description	Edit Values
Acct Dist Shortcut	No Defa	ault Value	Edit
Create New Value			
•	Search For Value		?
Value Description	Field Name Acct E	Dist Shortcut	
	Value		
	Description	-	
	Results Per 5 Page		
* Custom Field Values		Search	
marked with an asterisk are role-based values.			
Users can only modify			
the Default status of these Custom Field			
and a statement i rend			

Select the values codes from the Values list box, by enabling the appropriate checkbox.

5. Once your desired custom field values are selected, click the Add Values button. The values are added to your profile and become available for selection when you checkout.

Header (ext.) Codes Coo	de Favorites Inte	rnal Informat	tion	
Custom Field Name	Default Valu	e i	Description	Edit Values
Acct Dist Shortcut	N	lo Default Va	lue	Edit
Create New Value Value Description	R	esults Per	Values	
	S	Select Value	43 Des TEMP. INCRE	cription ASE PETTY CASH
* Custom Field Values ma an asterisk are role-based	rked with values.	00019	BANK CHANG	GE ORDER
Users can only modify th status of these Custom Fi	e Default eld Values.	00020	TRAVELERS C	HECKS
			RRS-THIRD D	ARTY RECEIVABLE

To make a value your default value, select the desired custom field value, and select the Default checkbox. Save all changes

- 1. Select the desired custom field value.
- 2. Select the Default checkbox.
- 3. Save all changes.
- 4. Or, if you wish to remove the selected value, click the Remove button.
- 5. Click the Close button when all desired changes are complete.



Notice the selected default value displays. You can now add other custom field values to your profile.

Header (ext.) Codes		Code Favorites	Internal Information	
				?
Custom Fiel	d Name	Default Value	Description	Edit Values
Acct Dist Shortcut		00035	BRS-STUDENT TUITION RECEIVAB	LE Edit
L BU			No Default Value	Edit
∟ A/U			Edit	
L Account	1		No Default Value	Edit
L Org			No Default Value	Edit
L Fund			Edit	
L Activity			No Default Value	Edit
└ Project			No Default Value	Edit