

## 1. To select Default Accounting Codes, click:

- Person Icon



- View My Profile

HEATHER M HOLLEY

View My Profile

- Default User Settings

Default User Settings

- Custom Field and Accounting Code Defaults

Custom Field and Accounting Code Defaults

- Codes

### Custom Field and Accounting Code Defaults

Header (int.) Header (ext.) **Codes** Code Favorites Internal Information

## 2. To Create Accounting distribution Shortcut, click:

- Acct Dist Shortcut - Edit

| Custom Field Name  | Default Value    | Description | Edit Values |
|--------------------|------------------|-------------|-------------|
| Acct Dist Shortcut | No Default Value |             | <b>Edit</b> |

- Create New Value

**Create New Value**

- Type in the Value (number) or Description (name)

**Search For Value**

Field Name Acct Dist Shortcut

Value

Description

Results Per Page 5

**Search**

- Search

- Click checkbox to Select the Activity or Project

| Select                   | Value | Description   |
|--------------------------|-------|---------------|
| <input type="checkbox"/> |       |               |
| <input type="checkbox"/> | 13588 | USHOP SUPPORT |

- Add Values

**Add Values** **Back to Search**

- Click on the Description

| Value | Description          |
|-------|----------------------|
| 13588 | <b>USHOP SUPPORT</b> |

- Click Default checkbox

**Edit Existing Value**

Value 13588

Description USHOP SUPPORT

Default ☐

Status active

**Save** **Remove**

- Save

3. To select Code Favorites, click:

- Code Favorites Tab
- Add

Custom Field and Accounting Code Defaults

Header (int.) Header (ext.) Codes **Code Favorites** Internal Information ?

**Add**

Accounting Distribution ?

| Acct Dist Shortcut | BU       | Org      | Fund     | Activity | Project  | Account  | A/U      |
|--------------------|----------|----------|----------|----------|----------|----------|----------|
| no value           | no value | no value | no value | no value | no value | no value | no value |

- Type Nickname
- Click Default checkbox
- Acct Dist Shortcut  
(same as from saved codes)

Accounting Distribution ? X

Nickname  ☐ Default

| Acct Dist Shortcut                                                                 | BU                              | Org                                | Fund                              | Activity                           | Project                               | Account                                           | A/U                                               | add split |
|------------------------------------------------------------------------------------|---------------------------------|------------------------------------|-----------------------------------|------------------------------------|---------------------------------------|---------------------------------------------------|---------------------------------------------------|-----------|
| <input type="text"/><br>Select from profile values...<br>Select from all values... | 01<br>Select from all values... | 01673<br>Select from all values... | 1001<br>Select from all values... | 13588<br>Select from all values... | no value<br>Select from all values... | <input type="text"/><br>Select from all values... | <input type="text"/><br>Select from all values... |           |

**Save** **Cancel**

- Account
- A/U
- Split if desired
- Save