## Adding/Defaulting Index (Fund) Account Numbers

## Adding Index account numbers to your profile.

1. On the homepage, click Person Icon in the upper right-hand corner and select 'View My Profile'.

All 👻	Search (Alt+Q)	٩	119.90 USD	E	♡ №	<b>₽</b>
	Allysa Robins	on				User
Shopping Dashboard	View My Profile Dashboards Manage Searche Manage Search Set My Home Pa Search Help For	es Exports age A Solution				
	My Recently Cor My Recently Cor	npleted Req npleted Pure	uisitions chase Orders			4 2 Logout

2. Expand 'Default User Settings' from the menu on the left. Then select 'Custom Field and Accounting Code Defaults'.

Allysa Robinson		User's Name, Phon	User's Name, Phone Number, Email, etc.				
User Name AWBIRCHE		First Name	Allysa				
		Last Name	Robinson				
User Profile and Preferences	<	Phone Number *	+1 226 224 5007 ovt				
User's Name, Phone Number, Email, e	etc.		International phone numbers must begin with +				
Language, Time Zone and Display Se	ettings						
App Activation Codes		Mobile Phone Number	+1 336-214-4427				
Early Access Participation			International phone numbers must begin with +				
Update Security Settings	>	E-mail Address *	awbirche@uncg.edu				
Default User Settings	<						
Custom Field and Accounting Code [	Defaults	Department *	Procurement Services (Purchasing & Risk Management				
Default Addresses		Position					
Cart Assignees							
Payment Options		Authentication Method	SAML 🗸				
User Roles and Access	>	Liser Name *					
Ordering and Approval Settings		ooor Hame	AWBIRCHE				

## 3. Click the Codes tab.

llysa Robinson		Custom Field and Accounting Code Defaults					
User Name AWBIRCHE		Header (int.) Delivery Codes Code	Favorites Cart				
					B		
		Custom Field Name	Default Value	Description	Edit Values		
User Profile and Preferences	>	Withholding	No Defau	lt Value	Edit		
Update Security Settings	>	Include Pay Stub with Check	No Defau	It Value	Edit		
Default User Settings	<	Pankwira	No Dofau	It Value	Eur		
Custom Field and Accounting Code	e Defaults	Dalikwile	NO Delau	it value	Edit		
Default Addresses		Check Pickup	No Defau	lt Value	Edit		
Cart Assignees							
Payment Options							
User Roles and Access	5						

4. Click the 'Edit' button for each option you want to create a default for.

l Accounting	g Code Defaults	
Codes Code Fa	avorites Cart	
		₽?
Default Value	Description	Edit Values
117042	Purchasing	Edit
G	G	Edit
	No Default Value	Edit
201210	Household - Janatorial Supplies	Edit
	Codes Code Fa	Defaults         Code Favorites Cart         Default Value         Default Value       Description         117042       Purchasing         G       G         No Default Value       No Default Value         201210       Household - Janatorial Supplies

5. Click 'Create New Value'

## **Custom Field and Accounting Code Defaults**

Header (in	nt.) Delivery	Codes	Cod	e Favorites	Cart		
							E 1
Cust	tom Field Nan	ne		Default Valu	ie	Description	Edit Values
Index			1170	042		Purchasing	Edit
Edit V. Create N	alues ew Value						Close
Value	Description			Edit Exist	ing V	alue	₽?
value 1170/2	Purchasing			Value	1	117042	
117047	Central Recei and Warehou	iving Ise	I.	Descripti Default	on F	Purchasing	
117507	Housekeepin	g	-	Status	а	ctive	_

6. Select the Index/ Fund number you would like to add. Click 'Add Values'

Results Per Page 5 🗸	Values Found 7	Page 1 🗸 of 2 🕨 🗅 ?
Select	Value	Description
	117040	Bryan House
	117041	Insurance
	117043	Human Resources
	117045	Postal Service
	117046	Fixed Assets
	Add Values	Back To Search
Results	Per Page	✓ Page 1 ✓ of 2 ▶

7. Click the check box if you want to add it to the default Fund#, Click 'Save'.

Custom Field and Ac	counting	g Code D	efaults	
Header (int.) Delivery Code	S Code Fa	avorites Ca	rt	
				₽?
Custom Field Name	Def	ault Value	Description	Edit Values
Index	117042		Purchasing	Edit
/ Edit Values				Close
Value Description	E	dit Existing	Value	2
117040 Bryan House		/alue	117040	
117042 Purchasing		Description	Bryan House	
117047 Central Receiving		Default		
Ope	•	Status	active Save Remove	
* Custom Field Values marke with an asterisk are role-base values. Users can only modif the Default status of these Custom Field Values.	ed ed fy			

8. If you need to remove one simply Click 'Remove'.

			Edit Existing	Value	2
Value	Description	*	Value	117040	_
117040	Bryan House		value	11/040	
117042	Purchasing		Description	Bryan House	
117047	Central Receiving		Default		
	and Warehouse Ope	-	Status	active	
				Save Remove	

9. Update the Accounting Codes click 'Code Favorites' Then Click 'Edit'.

eader (int.) Delivery	Codes Code Favor	ites Cart	
			E
se Code Favorites for on heckout. You may creat sed combination of acc heckout by editing the confile.	uick access to accounti te a new Code Favorite b counting codes with or v codes section or by sele	ing code combinations saved to by clicking the "Add" button and vithout splits. Code Favorites a cting it as your default account	o your profile during entering a commonly re accessed during ing codes in your
Add			2
Add Accounting Codes	1+)		? Edit Delete
Add Accounting Codes Procurement (defau Chart	lt) Index	Account	2 Edit Delete
Add Accounting Codes Procurement (defau Chart	lt) Index 117042	Account	2 Edit Delete Activity

10. Type a **Nickname** (Department name that the Fund is for), **Check** the Default box if you want, Type the **Index#**, Type or search for the **Account #**, Then Click '**Save**'.

Custom Field and Accounti	ng Code Defaults			[	₽   ?
Header (int.) Delivery Codes Code	Favorites Cart	₽?			
Use Code Favorites for quick access to a checkout. You may create a new Code Fa used combination of accounting codes w checkout by editing the codes section or profile.	ccounting code combinations saved vorite by clicking the "Add" button ar ith or without splits. Code Favorites by selecting it as your default accou	to your profile during ad entering a commonly are accessed during nting codes in your			
Accounting Codes           Nickname         Procurement           Nickname         Nickname cannot be blank	🗸 Default			₽ ?	X
Chart	Index	Account	Activity	add split	
G Select from profile values Select from all values	117042 Select from profile values Select from all values	201110 Select from profile values Select from all values	Select from profile values Select from all values		
		Save Cancel			