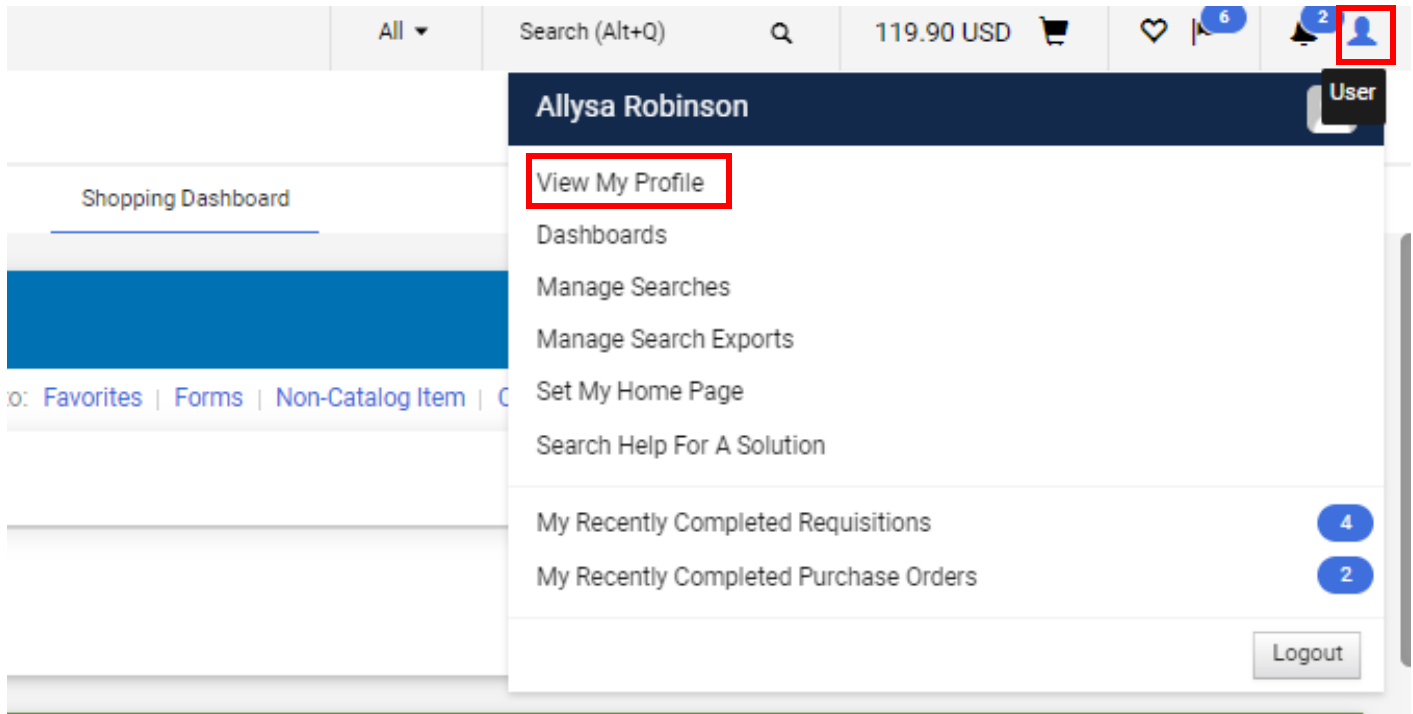


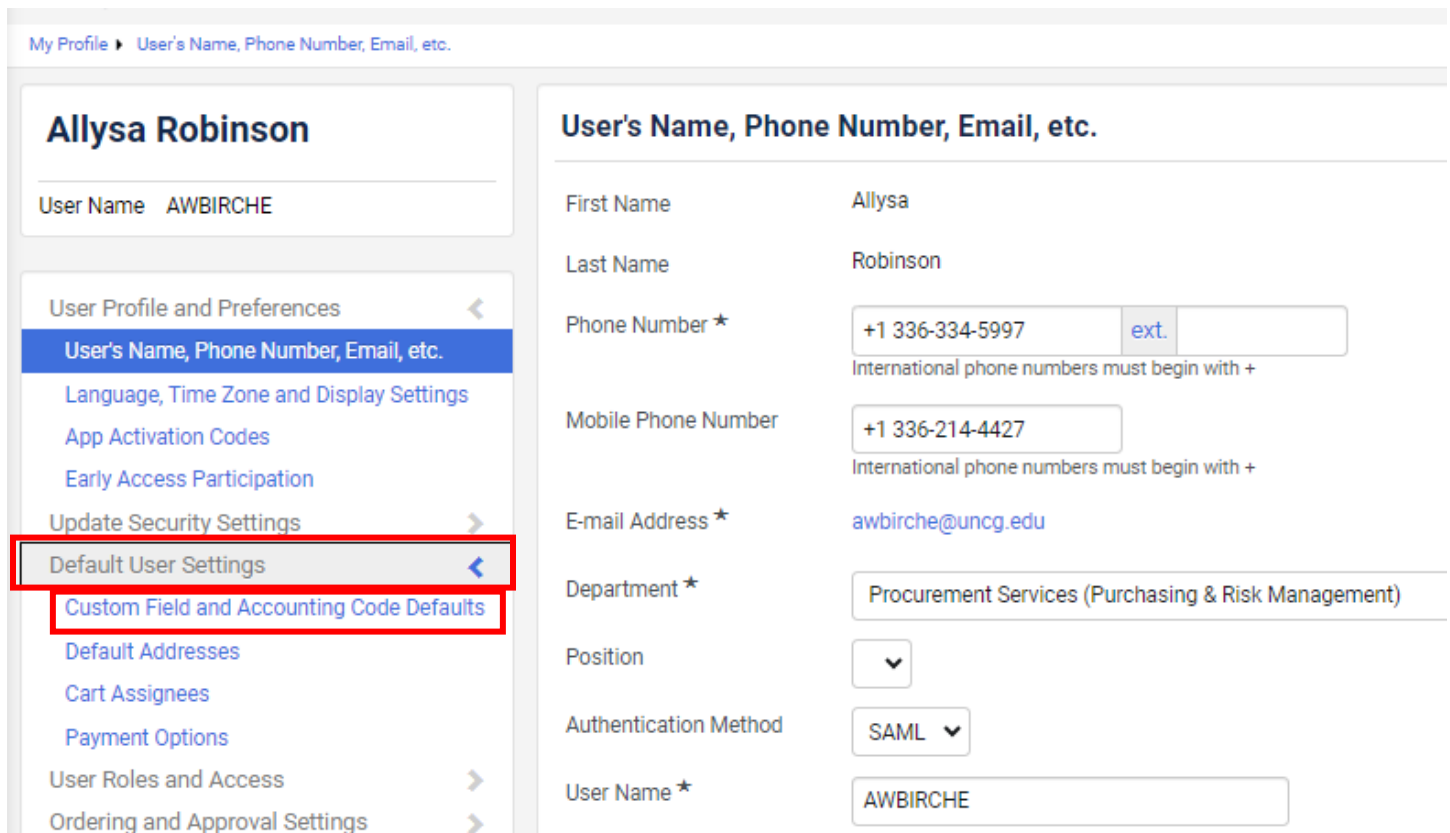
Adding/Defaulting Index (Fund) Account Numbers

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'.



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



3. Click the Codes tab.

My Profile ▶ Custom Field and Accounting Code Defaults

Allysa Robinson

User Name AWBIRCHE

- User Profile and Preferences >
- Update Security Settings >
- Default User Settings <
- Custom Field and Accounting Code Defaults**
- Default Addresses
- Cart Assignees
- Payment Options
- User Roles and Access >

Custom Field and Accounting Code Defaults

Header (int.) Delivery **Codes** Code Favorites Cart

Custom Field Name	Default Value	Description	Edit Values
Withholding	No Default Value		Edit
Include Pay Stub with Check	No Default Value		Edit
Bankwire	No Default Value		Edit
Check Pickup	No Default Value		Edit

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

Custom Field and Accounting Code Defaults

Header (int.) Delivery **Codes** Code Favorites Cart

Custom Field Name	Default Value	Description	Edit Values
Index	117042	Purchasing	Edit
Chart	G	G	Edit
Fund	No Default Value		Edit
Organization	No Default Value		Edit
Activity	No Default Value		Edit
Program	No Default Value		Edit
Account	201210	Household - Janatorial Supplies	Edit

5. Click 'Create New Value'

Custom Field and Accounting Code Defaults

Header (int.) Delivery **Codes** Code Favorites Cart

Custom Field Name	Default Value	Description	Edit Values
Index	117042	Purchasing	Edit

Edit Values [Close](#)

[Create New Value](#)

Edit Existing Value

Value: 117042

Description: Purchasing

Default:

Status: active

[Save](#) [Remove](#)

Value	Description
117042	Purchasing
117047	Central Receiving and Warehouse Ope
117507	Housekeeping

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
<input checked="" type="checkbox"/>	117040	Bryan House
<input type="checkbox"/>	117041	Insurance
<input type="checkbox"/>	117043	Human Resources
<input type="checkbox"/>	117045	Postal Service
<input type="checkbox"/>	117046	Fixed Assets

Add Values Back To Search

Results Per Page 5 Page 1 of 2

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

Custom Field and Accounting Code Defaults

Header (int.) Delivery Codes Code Favorites Cart

Custom Field Name	Default Value	Description	Edit Values
Index	117042	Purchasing	Edit

Edit Values Close

Create New Value

Value	Description
117040	Bryan House
117042	Purchasing
117047	Central Receiving and Warehouse Ope

Edit Existing Value

Value 117040

Description Bryan House

Default

Status active

Save Remove

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

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

Value	Description
117040	Bryan House
117042	Purchasing
117047	Central Receiving and Warehouse Ope

Edit Existing Value

Value 117040

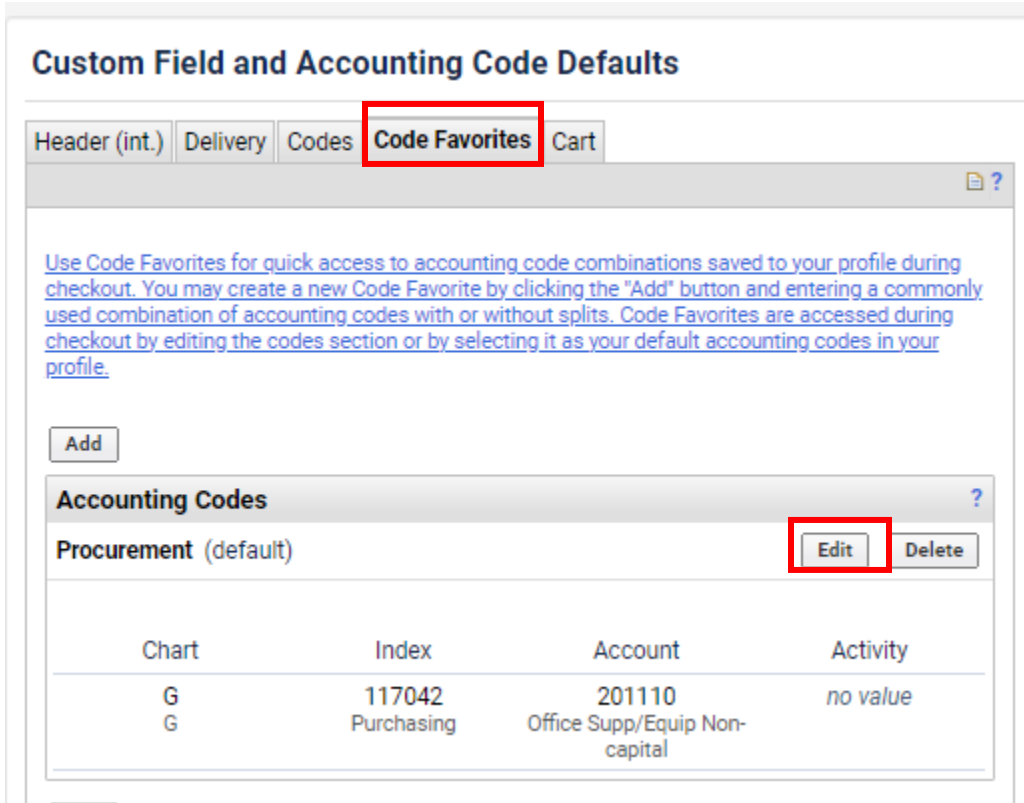
Description Bryan House

Default

Status active

Save Remove

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



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'.

