

Setting Default and Favorite Accounting Codes from Profile

In ShopBlue, you can enter multiple accounting codes that will link to your profile. Then when checking out, you can easily select the appropriate accounting codes. A default accounting code will automatically populate during checkout while a favorite accounting code will need to be selected. State accounting code favorites or defaults will need to be updated annually with the new fiscal year.

1. Click on the user icon at the top right of the screen and select “View My Profile” (Figure 1).

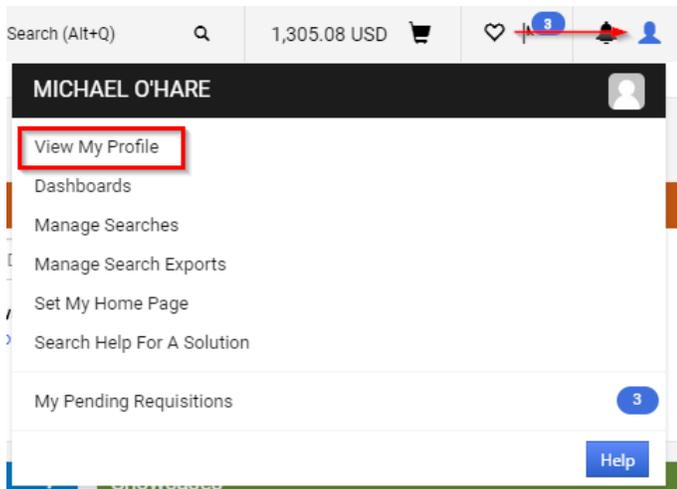


Figure 1

2. In “Default User Settings,” select “Custom Field and Accounting Code Defaults” (Figure 2).

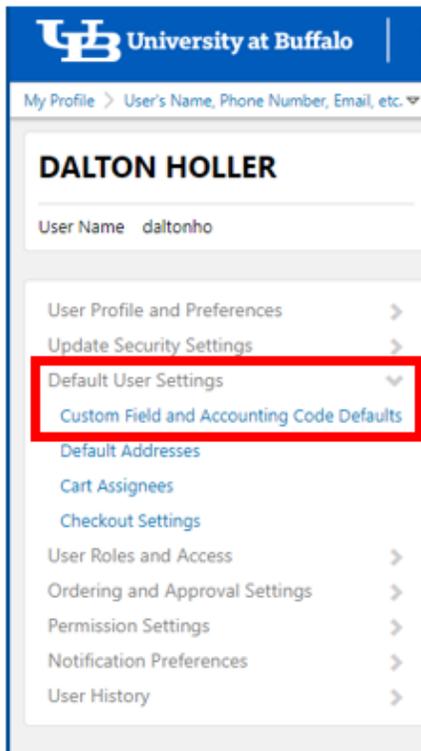


Figure 2

- On the “Custom Field and Accounting Code Defaults” page, select the “User Code Favorites” tab, then click “Add” (Figure 3).

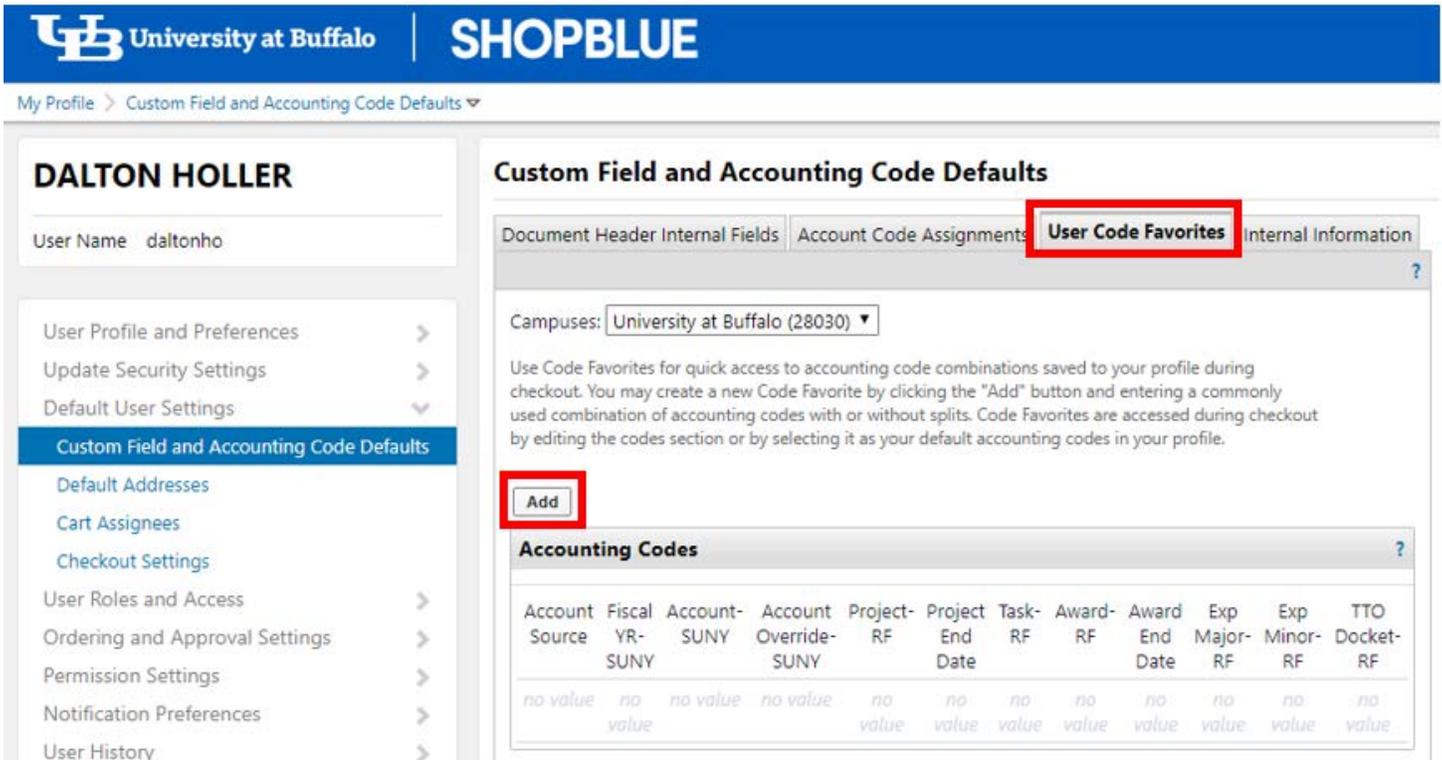


Figure 3

- When setting an accounting code, name your code for easy access in the “Nickname” field. To make the accounting code your default accounting code, check the “Default” box (Figure 4). This will make that accounting code automatically populate when checking out.

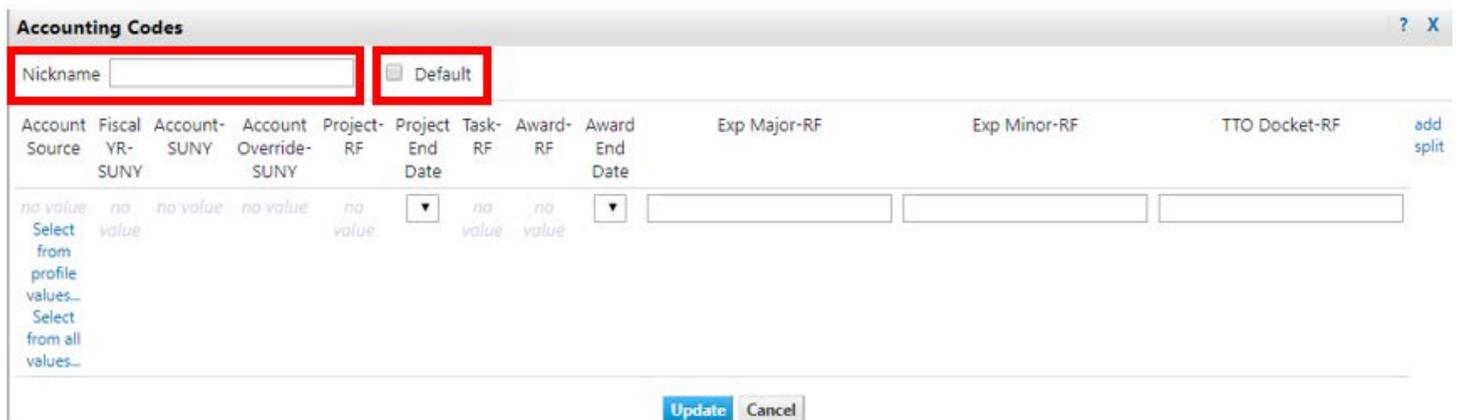


Figure 4

- Enter all necessary information for the State or Research Foundation (RF) accounting codes. Upon completion, select “Update” (Figure 5). *Note: the example shows an RF account.*

Accounting Codes ? X

Nickname: RF Account Default

Account Source	Fiscal YR-SUNY	Account-SUNY	Account Override-SUNY	Project-RF	Project End Date	Task-RF	Award-RF	Award End Date	Exp Major-RF	Exp Minor-RF	TTO Docket-RF	add split
R Select from profile values... Select from all values...	N/A Select from all values...	N/A Select from all values...	no value	1115526 Select from all values...	06/30/2019	1115526-1 Select from all values...	64755 Select from all values...	06/30/2019	OTR Select from all values...	Miscellaneous Other Select from all values...		

Update Cancel

Figure 5

- After updating, you will be brought back to the “User Code Favorites” tab. You can now see that your accounting codes have been set up. Note that the default accounting code is notated. To edit your accounting codes select “Edit”; to delete an accounting code, select “Delete”; to add an additional accounting code to your favorites, select “Add” (Figure 6). *Note: you can only have one accounting code favorite selected as the default.*

DALTON HOLLER

User Name daltonho

- User Profile and Preferences >
- Update Security Settings >
- Default User Settings >
- Custom Field and Accounting Code Defaults**
- Default Addresses
- Cart Assignees
- Checkout Settings
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >

Custom Field and Accounting Code Defaults

Document Header Internal Fields | Account Code Assignments | **User Code Favorites** | Internal Information ?

Campuses: University at Buffalo (28030)

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the “Add” button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

Add

Accounting Codes ?

RF Account (default) **Edit** **Delete**

Account Source	Fiscal YR-SUNY	Account-SUNY	Account Override-SUNY	Project-RF	Project End Date	Task-RF	Award-RF	Award End Date	Exp Major-RF	Exp Minor-RF	TTO Docket-RF
R Research	N/A N/A	N/A N/A	no value	1115526 030- Karlsen- Facilities updates	06/30/2019 06/30/2019	1115526- 1 Facilities updates	64755 13/14 RF Funded Allocation	06/30/2019 06/30/2019	OTR Other Expenses	Miscellaneous Other	no value

Figure 6

Updating State Accounting Code Favorites for the New Fiscal Year

At the beginning of the new fiscal year, state accounting codes that have been saved as favorites or defaults in your ShopBlue profile will need to be updated with the new fiscal year.

1. Click on the user icon at the top right of the screen and select “View My Profile” (Figure 7).

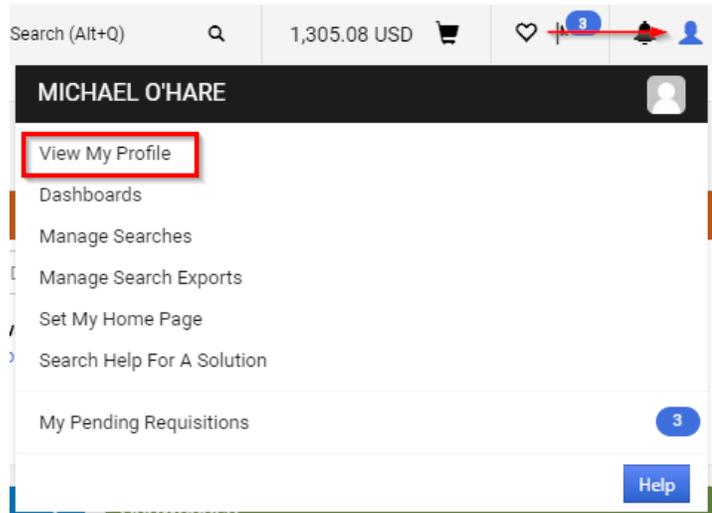


Figure 7

2. In “Default User Settings,” select “Custom Field and Accounting Code Defaults” (Figure 8).

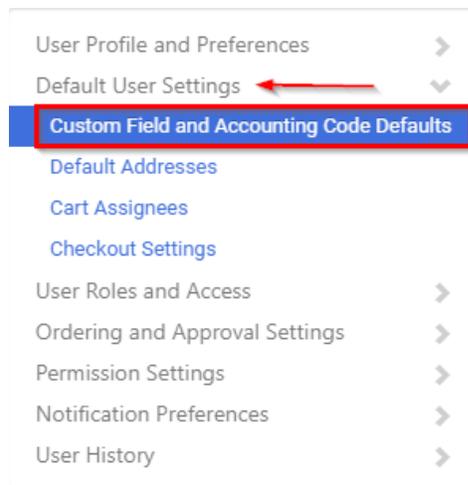


Figure 8

3. In the header, click the “User Code Favorites” tab (Figure 9).

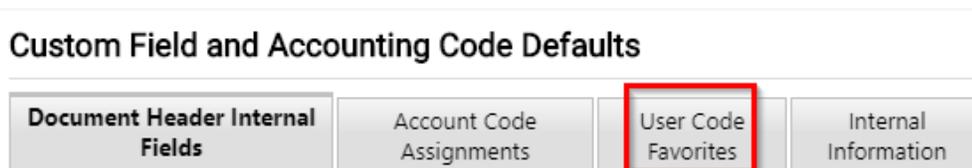


Figure 9

- In the “Accounting Codes” section, choose a State accounting code that has the old fiscal year and click “Edit” (Figure 10).

Account Source	Fiscal YR-SUNY	Account-SUNY	Project-RF	Project End Date	Task-RF	Award-RF	Award End Date	Exp Major-RF	Exp Minor-RF	TTO Docket-RF
S State	2019	90071101-28030	N/A RF Only	N/A RF Only	N/A RF Only	N/A RF Only	N/A RF Only	N/A RF Only	N/A RF Only	no value

Figure 10

- In “Fiscal YR-SUNY,” click “Select from all values...” and select the new fiscal year from the dropdown. Once the fiscal year has updated, click “Update” to save and close your entry (Figure 11).

Accounting Codes

Nickname: Default

Account Source	Fiscal YR-SUNY	Account-SUNY	Project-RF	Project End Date	Task-RF
<input type="text" value="S"/>	<input type="text" value="2020"/>	<input type="text" value="90071101-28030"/>	<input type="text" value="N/A"/>	<input type="text" value="N/A"/>	<input type="text" value="N/A"/>

[Select from profile values...](#)
 [Select from all values...](#)
 [Select from all values...](#)
 [Select from all values...](#)
 [Select from all values...](#)

Figure 11