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](image1)

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

![Figure 2](image2)
3. On the “Custom Field and Accounting Code Defaults” page, select the “User Code Favorites” tab, then click “Add” (Figure 3).

4. 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.
5. 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.

![Figure 5]

6. 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.

![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](image)

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

![Figure 8](image)

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

![Figure 9](image)
4. In the “Accounting Codes” section, choose a State accounting code that has the old fiscal year and click “Edit” (Figure 10).

5. 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).