Setting Default and Favorite Accounting Codes from Profile

In ShopBlue, users will be able to enter multiple accounting codes that will link to their profile. When checking out, users 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.

1. In the top toolbar, select the dropdown arrow to access your user profile (Figure 1).

![Figure 1](image1)

2. From the fly out menu, select “View My Profile” (Figure 2).

![Figure 2](image2)

3. Under “Default User Settings”, select “Custom Field and Accounting Code Defaults” (Figure 3).

![Figure 3](image3)
4. On the “Custom Field and Accounting Code Defaults” page, select the “User Code Favorites” tab. Then select “Add”, located above accounting codes (Figure 4).

5. When setting an account code, name your code for easy access in the “Nickname” field. To make the code your Default accounting code, check the Default box (Figure 5). This will make that accounting code automatically populate when checking out.
6. Enter all necessary information for State or RF account codes. Upon completion, select “Update” (Figure 6). *Note: the example below is for a RF account.*

![Figure 6](image)

7. 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 account 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 7). *Note: users can only have one accounting code favorite selected as their default.*

![Figure 7](image)