
System Functions - User Roles

Shopper

- Adds items to carts
- Assigns carts to Requisitioner

Requisitioner

- Adds items to carts
- Updates or changes carts
- Reviews assigned carts
- Places order
- Withdraws requisitions

Approver

- Approves requisitions
- Rejects lines or entire requisition

Role assignments can be changed with submission of SAP Security form to ITAC. To view your assigned role, follow instructions on the next page.

System Functions – How to Identify User Roles

STEP 1: Select **your name** in the top right corner of the TSUS Marketplace home page

STEP 2: Select **View My Profile**. My Profile page appears.

STEP 3: Select **User Rolls and Access**.

STEP 4: Select **Assigned Rolls**.

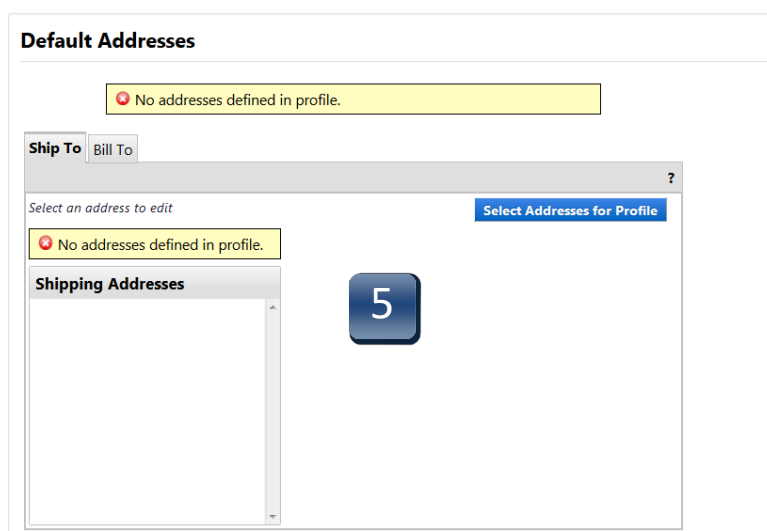
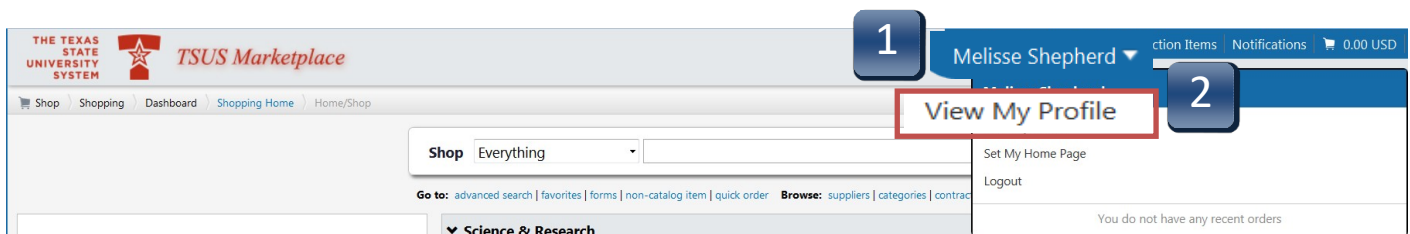
STEP 5: **Assigned Roll** appears.

The screenshots illustrate the process of identifying user roles in the TSUS Marketplace:

- Step 1:** The top right corner of the TSUS Marketplace home page shows the user's name, **Melisse Shepherd**, with a dropdown arrow.
- Step 2:** The dropdown menu is open, and **View My Profile** is selected.
- Step 3:** The user's profile page is displayed. The **User Roles and Access** section is highlighted.
- Step 4:** The **Assigned Roles** link is highlighted.
- Step 5:** The **Assigned Roles** list is shown, displaying the role **Shopper**.

System Functions – Profile Setup – Default Shipping Address

- STEP 1:** Select **your name** in the top right corner of the TSUS Marketplace home page.
- STEP 2:** **View My Profile.** My Profile page appears.
- STEP 3:** Select **Default User Settings.**
- STEP 4:** Select **Default Addresses.**
- STEP 5:** **Default Address** box appears.



System Functions - Profile Setup – Default Shipping Address

- STEP 6:** Under the **Ship To** tab, click **Select Addresses for Profile** button. The **Select Address Template** window will appear.
- STEP 7:** From **Select Address Template** drop down menu, choose your shipping location. (San Marcos users will select **UDC**—University Distribution Center. Round Rock users will use **RRHEC**—Round Rock Higher Education Center or **RRSON**—Round Rock School of Nursing).

The screenshot shows the 'Default Addresses' window with the 'Ship To' tab selected. A yellow message box at the top states 'No addresses defined in profile.' Below this, there are two tabs: 'Ship To' and 'Bill To'. A blue button labeled 'Select Addresses for Profile' is visible. A blue box with the number '6' points to this button. Below the tabs, there is a 'Shipping Addresses' section with a message 'No addresses defined in profile.' and a 'Select Address Template' dropdown menu. The dropdown menu is open, showing a list of address templates: CHA, CRC, DHRL, ETS, FAC, FCS, HRL, KAP, MSE, OHC, RRHEC, RRSON, SBDC, SHC, SHC-P, STAR, TJCTC, TSUS, and UDC. A blue box with the number '7' points to the dropdown menu. Red boxes highlight the 'RRHEC', 'RRSON', and 'UDC' options in the list.

Default Addresses

No addresses defined in profile.

Ship To **Bill To**

Select an address to edit

No addresses defined in profile.

Shipping Addresses

Select Address Template

Select Address Template

CHA
CRC
DHRL
ETS
FAC
FCS
HRL
KAP
MSE
OHC
RRHEC
RRSON
SBDC
SHC
SHC-P
STAR
TJCTC
TSUS
UDC

System Functions - Profile Setup – Default Shipping Address

STEP 8: Once selected, location will populate the **Nickname** field.

STEP 9: Enter your **Room** and **Building**.

STEP 10: Click **Save**.

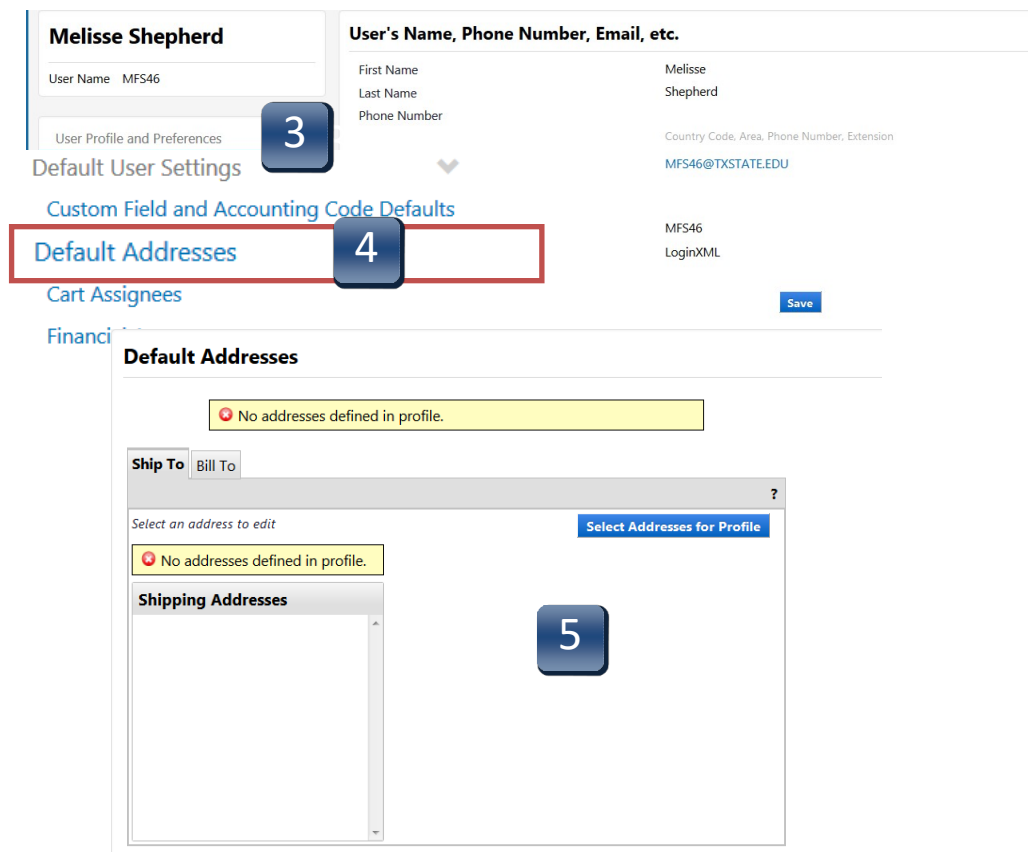
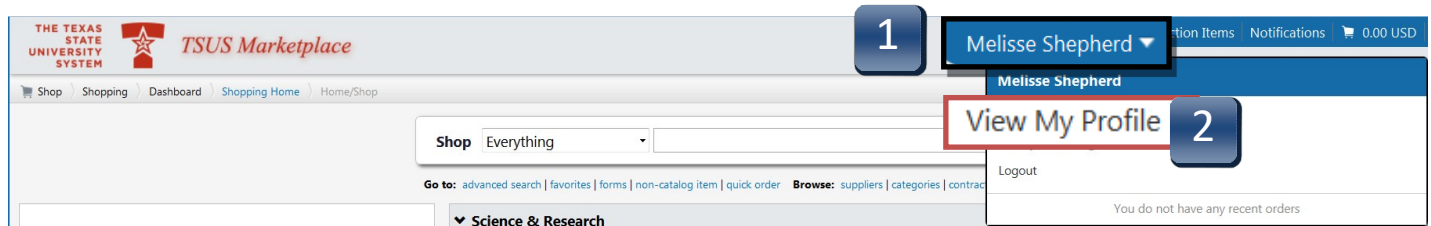
STEP 11: Newly saved address will populate **Shipping Addresses** menu.

The screenshot displays a web interface for editing a shipping address. On the left, a 'Shipping Addresses' sidebar lists 'UDC' with a callout '11'. The main 'Edit Selected Address' panel contains the following fields:

- Nickname:** UDC (Callout 8)
- Default:** ☒
- Current Default Address:** ---
- ADDRESS Section:**
 - Contact Line 1:** Melisse Shepherd
 - Room:** 527 (Callout 9)
 - Bldg:** JCK
 - Address Line 1:** 305 River Ridge Pkwy
 - Address Line 2:** University Distribution Center
 - City:** San Marcos
 - State:** TX
 - Zip Code:** 78666
 - Country:** United States
- Save:** (Callout 10)

System Functions - Profile Setup – Default Billing Address

- STEP 1:** Select **your name** in the top right corner of the TSUS Marketplace home page.
- STEP 2:** Select **View My Profile**. My Profile page appears.
- STEP 3:** Select **Default User Settings**.
- STEP 4:** Select **Default Addresses**.
- STEP 5:** **Default Address** box appears.



System Functions - Profile Setup – Default Billing Address

- STEP 6:** Under the **Bill To** tab, click Select Addresses for Profile button. The **Select Address Template** window will appear.
- STEP 7:** From **Select Address Template** drop down menu, choose **BillTo**.
Construction is for Facilities only.
- STEP 8:** Once selected, **BillTo** will populate in **Nickname** field.
- STEP 9:** Click **Save**
- STEP 10** Newly saved address will populate in Shipping Addresses menu.

Ship To **Bill To**

Select an address to edit

Billing Addresses

BillTo

Select Address Template

Select Address Template

BillTo

Construction

Select Addresses for Profile

Billing Addresses

BillTo

Edit Selected Address

Nickname **BillTo**

Default ☒

Current Default Address BillTo

ADDRESS

Contact Line 1 Attn: Invoices

Address Line 1 P.O. Box 747

City San Marcos

State TX

Zip Code 78667-0747

Country United States

Save

System Functions - Profile Setup – Notification Preferences

- STEP 1:** Select **your name** in the top right corner of the TSUS Marketplace home page.
- STEP 2:** Select **View My Profile**. **My Profile** page appears.
- STEP 3:** Select **Notification Preferences**
- STEP 4:** **Notification Preferences** section is categorized by notification type, e.g. Administration & Integration, Shopping, Carts & Requisitions, Purchase Orders, etc.

The image contains two screenshots illustrating the steps to reach the Notification Preferences page.

The top screenshot shows the TSUS Marketplace home page. In the top right corner, the user's name "Melisse Shepherd" is displayed with a dropdown arrow (labeled 1). A dropdown menu is open, showing the "View My Profile" option (labeled 2). The page also shows a search bar, navigation links, and a shopping cart icon.

The bottom screenshot shows the "My Profile" page. On the left, a sidebar menu lists various settings, with "Notification Preferences" highlighted (labeled 3). A red box highlights the "Notification Preferences" section, which includes links for "Administration & Integration", "Shopping, Carts & Requisitions", "Purchase Orders", "Catalog Management", "Accounts Payable", "Receipts", "Contracts", "Sourcing Director", "Supplier Management", and "Form Requests" (labeled 4). The main content area shows the "User's Name, Phone Number, Email, etc." section, which includes fields for First Name, Last Name, Phone Number, E-mail Address, and User Name, along with a "Save" button.

System Functions - Profile Setup – Notification Preferences

STEP 5: Once you have selected which category you want to edit, click on **Edit Section**.

STEP 6: Select **Override** from each function and use the drop-down to select email & notification. By selecting Email & Notification, you will receive alerts within TSUS Marketplace as well as an email when this workflow step has been completed.

We recommend the following:

Shopping, Carts & Requisitions

1. Assigned Cart Processed
2. PR Workflow complete/ PO Created
3. Cart/ PR rejected/ Returned
4. PR submitted into Workflow
5. For Approvers: PO Pending Workflow approval

Purchase Orders

1. PO rejected

STEP 7 Scroll down to bottom of list and click **Save**.

Notification Preferences: Shopping, Carts & Requisitions

Assigned Cart Processed Notification	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Assigned Cart Deleted Notification	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR submitted into Workflow	<input type="radio"/> Default <input checked="" type="radio"/> Override	None
PR pending Workflow approval	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR Workflow Notification available	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR Workflow complete / PO created	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR line item(s) rejected	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Cart/PR rejected/returned	<input checked="" type="radio"/> Default <input type="radio"/> Override	None

5 Edit Section

6 None
None
Email
Notification
Email & Notification

7 Save Save Changes

System Functions - Profile Setup - Default Funding

- STEP 1:** Select **your name** in the top right corner of the TSUS Marketplace home page.
- STEP 2:** Select **View My Profile**. My Profile page appears.
- STEP 3:** Select **Default User Settings**.
- STEP 4:** Select **Custom Field and Accounting Code Defaults**.
- STEP 5:** **Custom Field and Accounting Code Defaults** code tabs appear.

The screenshot shows the TSUS Marketplace user profile setup page. The top navigation bar includes the TSUS Marketplace logo and a user dropdown menu labeled 'Melisse Shepherd' with a '1' callout. The dropdown menu shows 'View My Profile' with a '2' callout. The main content area is divided into two sections: 'User's Name, Phone Number, Email, etc.' and 'Default User Settings'. The 'User's Name, Phone Number, Email, etc.' section contains fields for First Name (Melisse), Last Name (Shepherd), Phone Number, Country Code, Area, Phone Number, Extension, E-mail Address (MFS46@TXSTATE.EDU), User Name (MFS46), and Authentication Method (LoginXML). A 'Save' button is at the bottom right. The 'Default User Settings' section is on the left, with a '3' callout pointing to the 'E-mail Address' field. A '4' callout points to the 'Authentication Method' field. A '5' callout points to the 'Custom Field and Accounting Code Defaults' tab in the top navigation bar.

Melisse Shepherd
User Name MFS46

User Profile and Preferences >
Default User Settings >
Custom Field and Accounting Code Defaults >
Default Addresses >
Cart Assignees >
Financial Approvers >
User Roles and Access >
Ordering And Approval Settings >
Permission Settings >
Notification Preferences >
User History >

User's Name, Phone Number, Email, etc.

First Name Melisse
Last Name Shepherd
Phone Number
Country Code, Area, Phone Number, Extension
E-mail Address MFS46@TXSTATE.EDU
User Name MFS46
Authentication Method LoginXML

Save

Custom Field and Accounting Code Defaults

The screenshot shows the 'Custom Field and Accounting Code Defaults' page. The top navigation bar includes the 'Header (int.)' tab, 'Codes' tab, and 'Code Favorites' tab. The main content area is a table with columns: Custom Field Name, Default Value, Description, and Edit Values. A '5' callout points to the 'Edit Values' column.

Header (int.) Codes Code Favorites

Custom Field Name	Default Value	Description	Edit Values
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System Functions - Profile Setup - Default Funding

STEP 6: Select **Codes** tab.

STEP 7: To set a default or favorite value, select the **Edit** button in the **Edit Values** column for the **Custom Field Name** you want to change. The next pages will show you how to set up the below outlined fields.

Custom Field and Accounting Code Defaults

6			
Header Codes Code Favorites ?			
Custom Field Name	Default Value	Description	Edit Values
Account Assignment Category	No Default Value		Edit 7
Asset	No Default Value		Edit
Asset Sub-Number	No Default Value		Edit
Fund	No Default Value		Edit
└ Cost Center	No Default Value		Edit
└ Internal Order	No Default Value		Edit
└ WBS Element	No Default Value		Edit
G/L Account	No Default Value		Edit
Storage Location	No Default Value		Edit

Once default settings have been saved, the Codes tab should reflect them.

System Functions - Profile Setup – Default Funding

ACCOUNT ASSIGNMENT CATEGORY

STEP 1: On the **Codes** tab, click on the **Edit** button to the right of the **Account Assignment** value. Values selection menu appears.

Custom Field and Accounting Code Defaults

Header (int.) Codes Code Favorites ?			
Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit
└ Cost Center	No Default Value		Edit
└ Internal Order	No Default Value		Edit
└ WBS Element	No Default Value		Edit
G/L Account	No Default Value		Edit
Asset	No Default Value		Edit
Storage Location	No Default Value		Edit
Asset Sub-Number	No Default Value		Edit
Account Assignment Category	No Default Value		Edit
PO Type	BC	Bobcatalog Local	Edit
Limit	No Default Value		Edit
Expected Value	No Default Value		Edit
Overall Limit	No Default Value		Edit
Valid Start Date (Enter MMDDYYYY)	No Default Value		Edit
Valid End Date (Enter MMDDYYYY)	No Default Value		Edit
Purchasing Group	CPO	Central Purchasing Office	Edit

1

System Functions - Profile Setup – Default Funding

STEP 2: Click on the **Create New Value** button.

STEP 3: Make selections according to your funding type.

(A, F, K, or S--Do not use P/WBS)

Adding multiple values will generate a drop-down selection list when creating requisitions. Only one value can be selected as the default.

STEP 4: Click **Add Values**. Value is added to the table.

The screenshot shows the 'Codes' tab in a system interface. At the top, there are tabs for 'Header (int.)', 'Codes', and 'Code Favorites'. Below these is a table with columns: 'Custom Field Name', 'Default Value', 'Description', and 'Edit Values'. The table contains one row: 'Account Assignment Category' with 'No Default Value' and an 'Edit' button. Below the table is an 'Edit Values' section with a 'Close' button. A 'Create New Value' button is highlighted with a blue box and a '2' in a blue circle. Below this is a 'Values' section with a table of values. The table has columns 'Value' and 'Description'. The values are: A (Asset), F (Internal Order), K (Cost Center), P (WBS), and S (Statistical Internal Order). The 'K' row is highlighted with a red box and a '3' in a blue circle. Below the table is an 'Add Values' button, highlighted with a blue box and a '4' in a blue circle. A '4' in a blue circle is also placed over the 'K' row in the 'Values' table. A note at the bottom states: '* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.'

Custom Field Name	Default Value	Description	Edit Values
Account Assignment Category	No Default Value		Edit

Edit Values Close

Create New Value 2

Value	Description
K	Cost Center

4

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

Values ?

Value	Description
<input type="checkbox"/> A	Asset
<input type="checkbox"/> F	Internal Order
<input checked="" type="checkbox"/> K	Cost Center
<input type="checkbox"/> P	WBS
<input type="checkbox"/> S	Statistical Internal Order

Add Values 4

3

System Functions - Profile Setup – Default Funding

- STEP 5:** Click on the Description of the value you added to the table.
Edit Existing Value menu appears.
- STEP 6:** Check the **Default** box to set this value as the default for this field.
- STEP 7:** Click **Save**. New default value has been saved.
- STEP 8:** Click **Close** to return to Codes tab screen.

Account Assignment Category: No Default Value

Edit Values

Create New Value

Value	Description
K	Cost Center

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

Edit Existing Value

Value: K

Description: Cost Center

Default: ☒

Status: active

Save Remove

Close

System Functions - Profile Setup – Default Funding

FUND

STEP 1: On the **Codes** tab, click on the **Edit** button to the right of the **Fund** value. Values selection menu appears.

Custom Field and Accounting Code Defaults

Header (int.) Codes Code Favorites ?			
Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit
└ Cost Center	No Default Value		Edit
└ Internal Order	No Default Value		Edit
└ WBS Element	No Default Value		Edit
G/L Account	No Default Value		Edit
Asset	No Default Value		Edit
Storage Location	No Default Value		Edit
Asset Sub-Number	No Default Value		Edit
Account Assignment Category	No Default Value		Edit
PO Type	BC	Bobcatalog Local	Edit
Limit	No Default Value		Edit
Expected Value	No Default Value		Edit
Overall Limit	No Default Value		Edit
Valid Start Date (Enter MMDDYYYY)	No Default Value		Edit
Valid End Date (Enter MMDDYYYY)	No Default Value		Edit
Purchasing Group	CPO	Central Purchasing Office	Edit

1

System Functions - Profile Setup – Default Funding

- STEP 2:** Click on the **Create New Value** button. The **Search For Value** box appears.
- STEP 3:** If known, enter **Fund** number in the **Value** field and click **Search**. If unknown, click **Search**.
- STEP 4:** Select your fund. Adding multiple values will generate a drop-down selection list when creating requisitions. Only one value can be selected as Default.
- STEP 5:** Click **Add Values**. Value is added to table.

The screenshot shows the 'Edit Values' window for the 'Fund' custom field. The window has a table with columns: Custom Field Name, Default Value, Description, and Edit Values. The 'Fund' row shows 'No Default Value' and an 'Edit' button. Below the table is a 'Create New Value' button (Step 1) and a 'Search For Value' box (Step 2). The 'Search For Value' box contains fields for 'Field Name' (Fund), 'Value' (2000011020) (Step 3), 'Description', and 'Results Per Page' (5). A 'Search' button (Step 4) is at the bottom of the search box. Below the search box is a 'Results' section showing 'Values Found' (1) and a table with columns 'Value' and 'Description'. The table contains one row: 2000011020, Des Method. A checkbox is checked next to this row. Below the table are 'Add Values' (Step 5) and 'Back to Search' buttons. A note at the bottom left states: '* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.'

Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit

Edit Values Close

Create New Value 2

Value Description
2000011020 Des Method
5

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

Search For Value ?

Field Name Fund

Value 2000011020 3

Description

Results Per Page 5

Search 3

Results Values Found 1 Page 1 of 1 ?

Select Value Description

☒ 2000011020 Des Method

Add Values 4 Back to Search

5

System Functions - Profile Setup – Default Funding

- STEP 6:** Click the Description of the value you added to the table. **Edit Existing Value** menu appears.
- STEP 7:** Check the **Default** box to set this number as the default value for this field.
- STEP 8:** Click **Save**. New default value has been saved.
- STEP 9:** Click **Close** to return to Codes tab screen.

Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit

Edit Values [Close](#)

[Create New Value](#)

Value	Description
2000011020	Des Method

6

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

Edit Existing Value ?

Value: 2000011020

Description: Des Method

Default: ☒ 7

Status: active

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

8

System Functions - Profile Setup – Default Funding

COST CENTER

STEP 1: On the **Codes** tab, click on the **Edit** button to the right of the **Cost Center** value. Values selection menu appears.

Custom Field and Accounting Code Defaults

Header (int.) Codes Code Favorites ?			
Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit
└ Cost Center	No Default Value		Edit
└ Internal Order	No Default Value		Edit
└ WBS Element	No Default Value		Edit
G/L Account	No Default Value		Edit
Asset	No Default Value		Edit
Storage Location	No Default Value		Edit
Asset Sub-Number	No Default Value		Edit
Account Assignment Category	No Default Value		Edit
PO Type	BC	Bobcatalog Local	Edit
Limit	No Default Value		Edit
Expected Value	No Default Value		Edit
Overall Limit	No Default Value		Edit
Valid Start Date (Enter MMDDYYYY)	No Default Value		Edit
Valid End Date (Enter MMDDYYYY)	No Default Value		Edit
Purchasing Group	CPO	Central Purchasing Office	Edit

1

STEP 2: If you have added multiple funds, select your fund from the drop-down menu. Adding multiple values will generate a drop-down selection list when creating requisitions. Only one value can be selected as Default.

STEP 3: Click on the **Create New Value** button. The **New Value** box appears.

STEP 4: Enter Cost Center into the **Value** field in the New Value menu. Check the **Default** box to set this number as the default value for this field. Only one number can be selected as the Default. If you want to type in multiple cost center numbers, proceed to **Step 2** the repeat the above steps for each value.

STEP 5: Click **Save**. Value is added to table.

STEP 6: Click **Close** to return to Codes tab screen.

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System Functions - Profile Setup – Default Funding

- STEP 7:** If Cost Center is unknown, click **Search** from the **Search for Value** menu, make selections, then click on the **Add Values** button. Select multiple values to generate a drop-down selection list when creating requisitions.
- STEP 8:** To designate a **Default** value when using the **Search for Value**, click the description of the value you wish to make the default. **Edit Existing Value** menu appears.
- STEP 9:** Check the **Default** box to set this number as the default value for this field.
- STEP 10:** Click **Save**. New default value has been added.
- STEP 11:** Click **Close** to return to Codes tab screen.

The first screenshot shows the 'Search For Value' window. The 'Field Name' is 'Cost Center'. The 'Value' field is empty. The 'Description' field is empty. The 'Results Per Page' is set to 5. A blue box with the number 7 is over the 'Search' button.

The second screenshot shows the 'Results' window. The 'Values Found' is 1. The 'Page' is 1 of 1. The 'Select' checkbox is checked. The 'Value' is 1410140000 and the 'Description' is Procurement. A blue box with the number 7 is over the 'Add Values' button.

The first screenshot shows the 'Edit Values' window. The 'Custom Field Name' is 'Cost Center'. The 'Default Value' is 'No Default Value'. The 'Description' is empty. The 'Edit Values' button is highlighted. A blue box with the number 8 is over the 'Create New Value' button.

The second screenshot shows the 'Edit Existing Value' window. The 'Value' is 1410140000. The 'Description' is Procurement. The 'Default' checkbox is checked. The 'Status' is active. A blue box with the number 9 is over the 'Default' checkbox. A blue box with the number 10 is over the 'Save' button.

System Functions - Profile Setup – Default Funding

INTERNAL ORDER/GRANT/STATISTICAL ORDER

STEP 1: On the **Codes** tab, click on the **Edit** button to the right of the **Internal Order** value. Values selection menu appears.

Custom Field and Accounting Code Defaults

Header (int.) Codes Code Favorites ?			
Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit
└ Cost Center	No Default Value		Edit
└ Internal Order	No Default Value		Edit
└ WBS Element	No Default Value		Edit
G/L Account	No Default Value		Edit
Asset	No Default Value		Edit
Storage Location	No Default Value		Edit
Asset Sub-Number	No Default Value		Edit
Account Assignment Category	No Default Value		Edit
PO Type	BC	Bobcatalog Local	Edit
Limit	No Default Value		Edit
Expected Value	No Default Value		Edit
Overall Limit	No Default Value		Edit
Valid Start Date (Enter MMDDYYYY)	No Default Value		Edit
Valid End Date (Enter MMDDYYYY)	No Default Value		Edit
Purchasing Group	CPO	Central Purchasing Office	Edit

1

System Functions - Profile Setup – Default Funding

- STEP 2:** If you have added multiple funds, select your fund from the drop-down menu. Adding multiple values will generate a drop-down selection list when creating requisitions. Only one value can be selected as Default.
- STEP 3:** Click on the **Create New Value** button. The **Search For Value** box appears.
- STEP 4:** Type Internal Order into the **Value** field in the **Search For Value** box and click **Search**. If unknown, or you will be entering multiple values, leave the Value field blank and click **Search**. Values selection menu appears.
- STEP 5:** Select your Internal Order. Select multiple values to generate a drop-down selection list when creating requisitions. Click **Add Values**. Value(s) are added to the table.

The screenshot illustrates the process of adding a new value to a custom field. The main table at the top shows the 'Internal Order' field with a 'No Default Value' status. Below this, the 'Edit Values' section shows the 'Fund' dropdown set to '2000011020'. The 'Create New Value' button is highlighted with a red box and a blue '3' callout. The 'Search For Value' dialog box is open, with 'Internal Order' entered in the 'Field Name' field and '5100000009' entered in the 'Value' field, which is also highlighted with a blue '4' callout. The 'Search' button is highlighted with a red box and a blue '4' callout. The 'Results' panel on the right shows one result: '5100000009' with the description 'SPF - Football'. The 'Add Values' button is highlighted with a red box and a blue '5' callout. The 'Value' field in the 'Custom Field Values' table is also highlighted with a blue '5' callout.

Custom Field Name	Default Value	Description	Edit Values
Internal Order	No Default Value		Edit

Edit Values

Fund: 2000011020

Create New Value

Value: 5100000009

Description: SPF - Football

Search

Results Found: 1

Select	Value	Description
<input checked="" type="checkbox"/>	5100000009	SPF - Football

Add Values

Back to Search

System Functions - Profile Setup – Default Funding

- STEP 6:** To set a default Internal Order, click on the Description of the value you wish to make Default. **Edit Existing Value** menu appears.
- STEP 7:** Check the **Default** box to set this number as the default value for this field.
- STEP 8:** Click **Save**. New default value has been saved.
- STEP 9:** Click **Close** to return to Codes tab screen.

The screenshot shows the 'Internal Order' profile setup interface. At the top, there's a tab labeled 'Internal Order' and a yellow banner indicating 'No Default Value'. An 'Edit' button is in the top right. Below the banner, there's a section titled 'Edit Values' with a 'Fund' dropdown set to '2000011020' and a 'Create New Value' button. A table lists values, with '5100000009' and 'SPF - Football' selected. A blue box with the number '6' is overlaid on the table. To the right, the 'Edit Existing Value' dialog is open, showing fields for 'Value' (5100000009), 'Description' (SPF - Football), 'Default' (checked), and 'Status' (active). A blue box with the number '7' is overlaid on the 'Default' checkbox. At the bottom of the dialog, there are 'Save' and 'Move' buttons, with a blue box with the number '8' overlaid on the 'Save' button. A blue box with the number '9' is overlaid on the 'Close' button in the top right corner of the dialog. A footer note states '* Custom Field Values marked'.

Value	Description
5100000009	SPF - Football

* Custom Field Values marked

System Functions - Profile Setup – Default Funding

G/L ACCOUNT

STEP 1: On the **Codes** tab, click on the **Edit** button to the right of the **G/L Account** value. Values selection menu appears.

Custom Field and Accounting Code Defaults

Header (int.) Codes Code Favorites ?			
Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit
└ Cost Center	No Default Value		Edit
└ Internal Order	No Default Value		Edit
└ WBS Element	No Default Value		Edit
G/L Account	No Default Value		Edit
Asset	No Default Value		Edit
Storage Location	No Default Value		Edit
Asset Sub-Number	No Default Value		Edit
Account Assignment Category	No Default Value		Edit
PO Type	BC	Bobcatalog Local	Edit
Limit	No Default Value		Edit
Expected Value	No Default Value		Edit
Overall Limit	No Default Value		Edit
Valid Start Date (Enter MMDDYYYY)	No Default Value		Edit
Valid End Date (Enter MMDDYYYY)	No Default Value		Edit
Purchasing Group	CPO	Central Purchasing Office	Edit

1

System Functions - Profile Setup – Default Funding

- STEP 2:** Select **Create New Value**. **Search For Value** menu appears.
- STEP 3:** Type a G/L code into the **Value** field and click **Search**.
If unknown, or you will be entering multiple values, leave the **Value** field blank and click **Search**. Values selection menu appears.
- STEP 4:** Select your G/L code. Select multiple values to generate a drop-down selection list when creating requisitions. If you choose to have a default G/L, click the Default check box. You can also select multiple values to generate a drop-down selection list when creating requisitions. Click **Add Values**. Value(s) are added to the table.
- STEP 5:** Click **Close** to return to Code tabs screen.

The screenshot displays the 'Codes' tab with three sub-tabs: 'Header (int.)', 'Codes', and 'Code Favorites'. The main table has columns: 'Custom Field Name', 'Default Value', 'Description', and 'Edit Values'. A row for 'G/L Account' shows 'No Default Value' and an 'Edit' button. Below this is an 'Edit Values' section with a 'Create New Value' button (callout 1) and a 'Search For Value' dialog (callout 2). The dialog has fields for 'Field Name' (G/L Account), 'Value' (730000, callout 3), and 'Description'. It also has a 'Results Per Page' dropdown set to 5 and a 'Search' button (callout 3). To the left of the dialog is a table with 'Value' and 'Description' columns, showing '730000' and 'Consumable Supplies' (callout 4). To the right is a 'Results' window showing 'Values Found: 1' and a table with 'Value' and 'Description' columns, listing '730000' and 'Consumable Supplies'. It includes 'Add Values' and 'Back to Search' buttons (callout 4). A 'Close' button is also visible (callout 5).

Custom Field Name	Default Value	Description	Edit Values
G/L Account	No Default Value		Edit

Value	Description
730000	Consumable Supplies

* Custom Field Values

Search For Value

Field Name: G/L Account

Value: 730000

Description:

Results Per Page: 5

Search

Results

Per Page: 5

Values Found: 1

Page 1 of 1

Select	Value	Description
<input checked="" type="checkbox"/>	730000	Consumable Supplies

Add Values Back to Search

****It is *not* recommended that you set a *default* value if you order a variety of items on TSUS Marketplace. This field has the potential to change with every purchase.****

System Functions - Profile Setup – Default Funding

STORAGE LOCATION

STEP 1: On the **Codes** tab, click on the **Edit** button to the right of the **Storage Location** value. Values selection menu appears.

Custom Field and Accounting Code Defaults

Header (int.) Codes Code Favorites ?			
Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit
└ Cost Center	No Default Value		Edit
└ Internal Order	No Default Value		Edit
└ WBS Element	No Default Value		Edit
G/L Account	No Default Value		Edit
Asset	No Default Value		Edit
Storage Location	No Default Value		Edit
Asset Sub-Number	No Default Value		Edit
Account Assignment Category	No Default Value		Edit
PO Type	BC	Bobcatalog Local	Edit
Limit	No Default Value		Edit
Expected Value	No Default Value		Edit
Overall Limit	No Default Value		Edit
Valid Start Date (Enter MMDDYYYY)	No Default Value		Edit
Valid End Date (Enter MMDDYYYY)	No Default Value		Edit
Purchasing Group	CPO	Central Purchasing Office	Edit

1

System Functions - Profile Setup – Default Funding

STEP 2: Select **Create New Value**. **Search for Value** menu appears.

STEP 3: Type a Storage Location code into the **Value** field.

STEP 4: If you want this value to be the default value, check the **Default** box.

STEP 5: Click **Save**. Value added to the table. Click **Close** to return to Codes tab screen.

The screenshot shows the 'Edit Existing Value' dialog box. At the top, a table lists custom field values:

Custom Field Name	Default Value	Description	Edit Values
Storage Location	JCKP	Purchasing	Edit

Below this table is a 'Create New Value' button (callout 2) and a 'Close' button (callout 5). The 'Create New Value' button opens a search menu with the following table:

Value	Description
JCKP	Purchasing

Callout 5 points to the 'JCKP' value in this menu. The 'Edit Existing Value' dialog box contains the following fields:

- Value: JCKP (callout 3)
- Description: Purchasing (callout 3)
- Default: ☒ (callout 4)
- Status: active
- Save button (callout 5)

At the bottom left, it says '* Custom Field Values marked'.

System Functions - Profile Setup – Default Funding

- STEP 6:** If **Storage Location** is unknown, or you will be entering multiple values, click **Search** from the **Search for Value** menu, make selections, then click on the **Add Values** button. Select multiple values to generate a drop-down selection list when creating requisitions.
- STEP 7:** To designate a **Default** value when using the **Search for Value**, click the description of the value you wish to make the default. **Edit Existing Value** menu appears.
- STEP 8:** Check the **Default** box to set this number as the default value for this field.
- STEP 9:** Click **Save**. New default value has been added.
- STEP 10:** Click **Close** to return to Codes tab screen.

Search For Value

Field Name: Storage Location

Value:

Description:

Results Per Page: 5

Search 6

Results Per Page: 5

Page: 28 of 53

Values Found: 263

Select	Value	Description
<input type="checkbox"/>	JCKM	Tech Resources Business Services
<input type="checkbox"/>	JCKN	JCK 860 -University Marketing
<input type="checkbox"/>	JCKO	Audit and Compliance
<input checked="" type="checkbox"/>	JCKP	Purchasing
<input type="checkbox"/>	JCKQ	JCK 860 University News Service

Add Values **Back to Search**

Storage Location No Default Value **Edit**

Edit Values

Create New Value

Value	Description
JCKP	Purchasing

7

Edit Existing Value ?

Value: JCKP

Description: Purchasing

Default: ☒ 8

Status: active

Save 9

Close 10

* Custom Field Values marked