Quick Reference Guide

Adding Account Number/Object Codes to Profile

In This Guide

✓ Adding account number/object code values to your profile
✓ Assigning a default value
✓ Assigning a nickname

This guide demonstrates how to add account numbers and object code values to your profile. You can also assign a nickname to a value or set a value as a default.

Procedure

1. From the LSU GeauxShop homepage, access your profile by clicking your name and selecting the View My Profile link.

2. Click the following links/tabs in this sequence: Custom Field and Accounting Code Defaults → Code Favorites
3. Click the Add button located above Accounting Codes.

4. In the resulting pop-up window, make an entry in the Nickname field that will allow you to remember the associated account number or object code value later.

5. Check the Default checkbox if you want to make this account number/object code your default value. Default values will be added to all subsequent carts, but you can modify them for each cart, as needed.

6. Click on Select from all values... to search for available account numbers.
7. In the resulting pop-up window, enter any portion of the account number Value or Description in the respective fields and then click the Search button.

8. In the search results, click Select to choose the desired account number.

9. Click on Select from all values... to select for available transaction types.
10. Select the applicable transaction type from the drop down that appears.
11. Click on Select from all values... to search for available object codes.
12. In the resulting pop-up window, enter any portion of the object code Value or Description in the respective fields and then click the Search button.
13. In the search results, click Select to choose the desired object code.
14. Click the Save button to apply these changes to your profile.

15. The default account number and/or object code have been saved to your profile. Edits or deletions can be made by clicking the Edit or Delete buttons.

You have successfully added Account Number/Object Code defaults to your profile.

Be careful when processing your requisition because the default Account Number/Object Code will automatically appear in each of your requisitions.

This may result in your accidentally assigning incorrect values to your requisition, if you forget to make the necessary changes.

You can create favorite account numbers without an object code to allow for more flexibility.

You can also create favorites containing account number/object code split distributions and identifying a specific department financial approver.