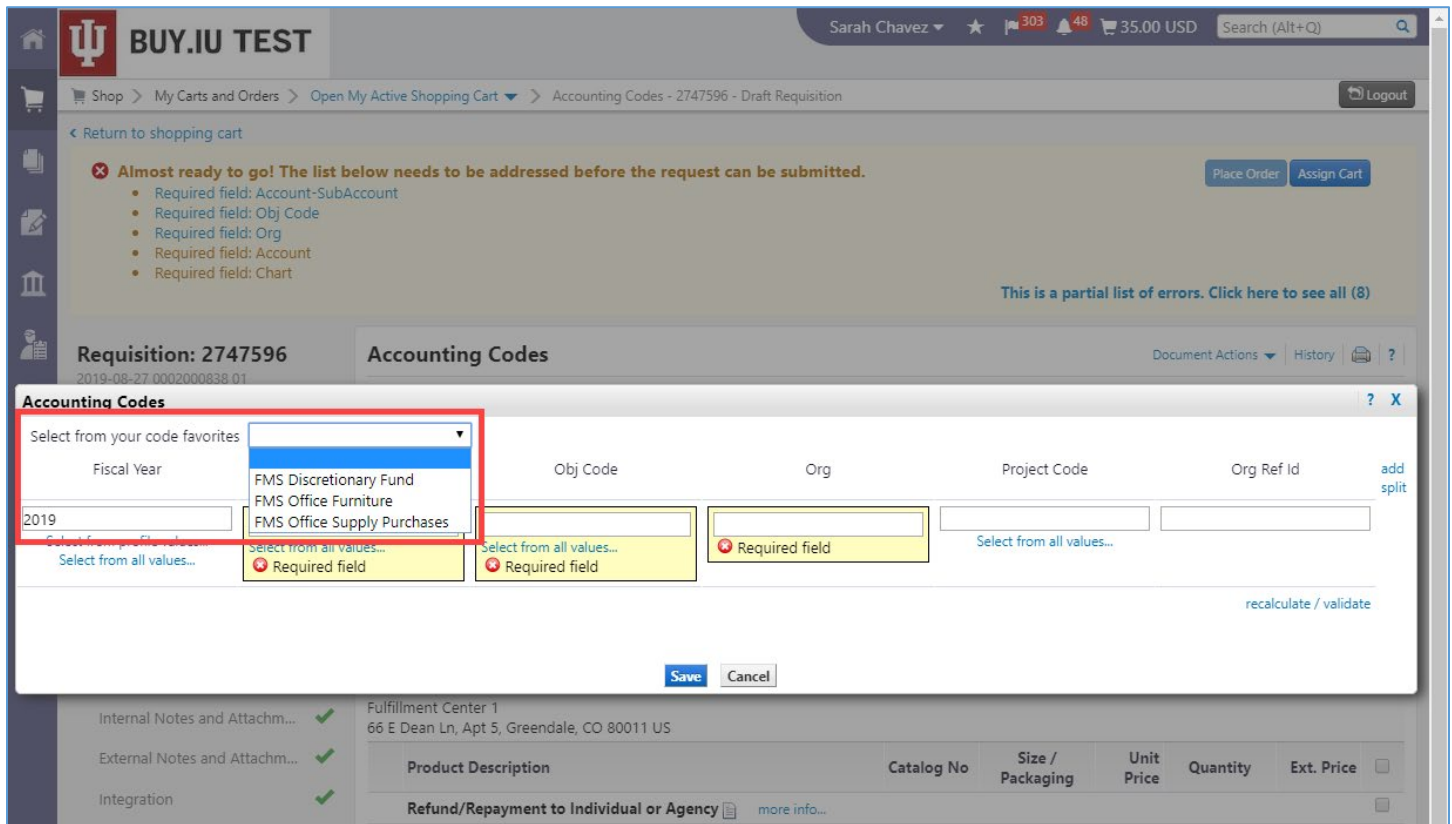
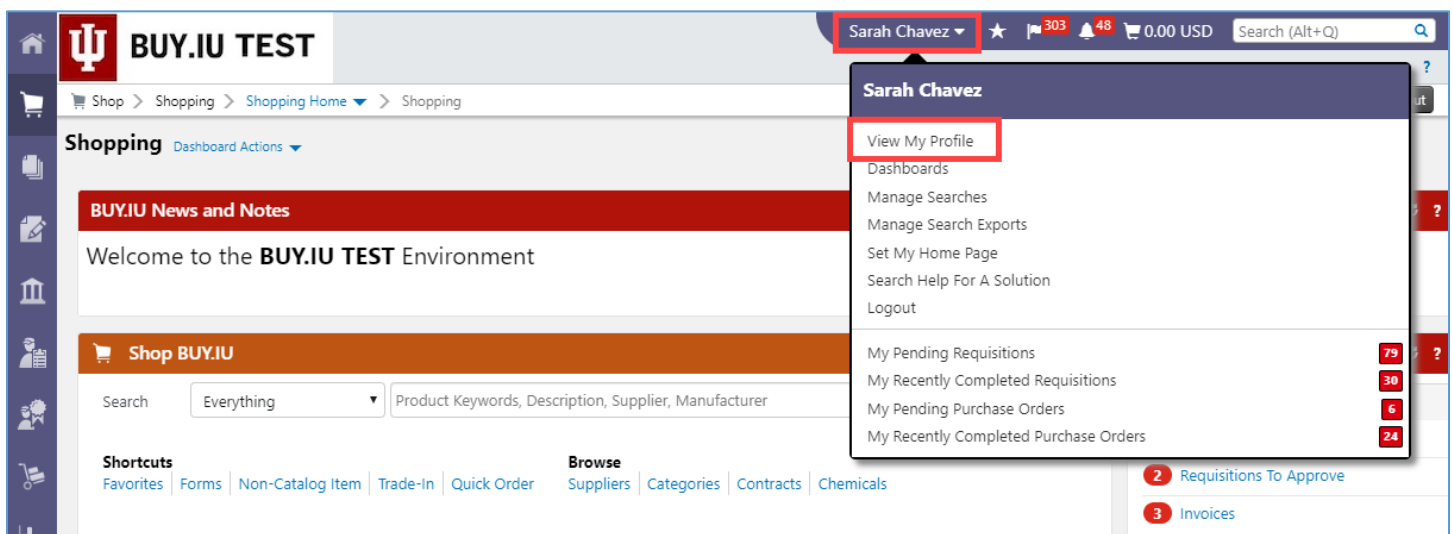


# The User Profile: Accounts

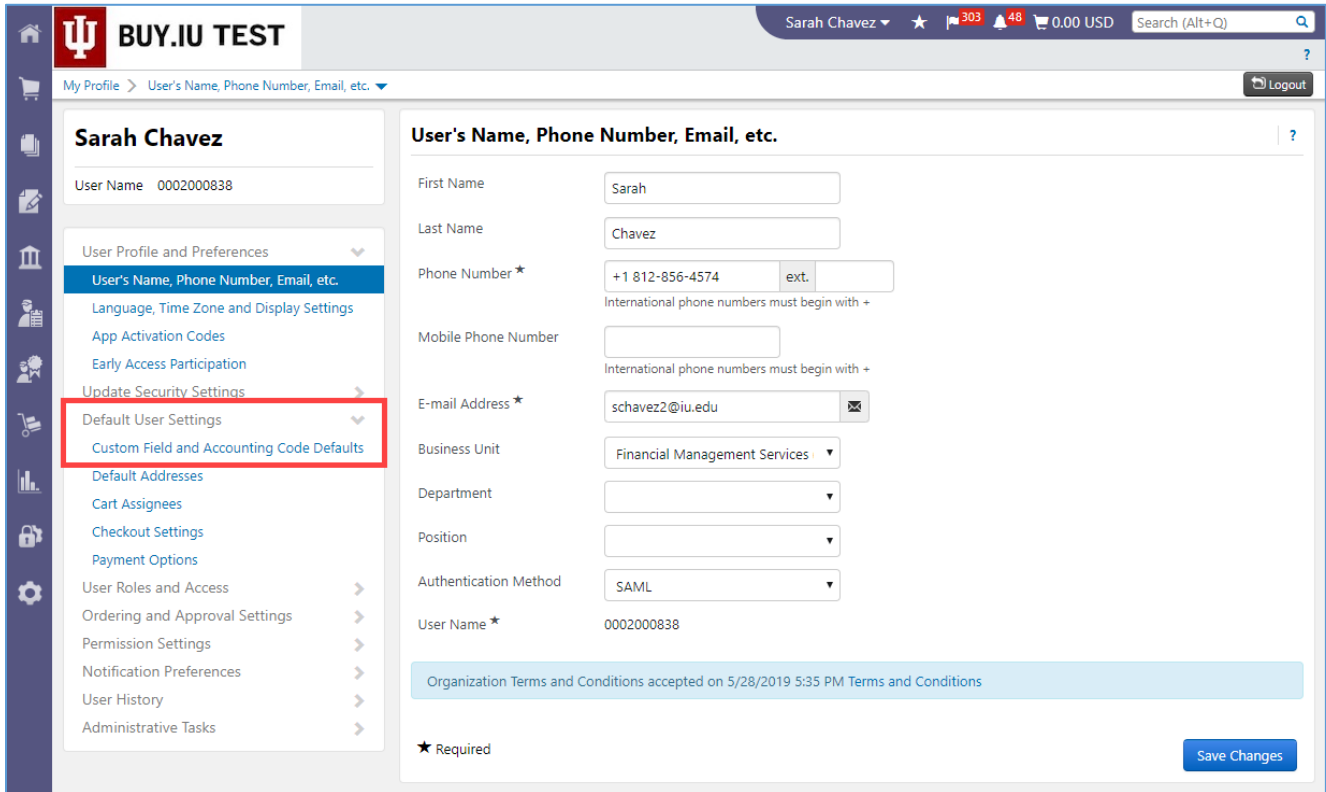
In BUY.IU, you can save KFS account numbers to your user profile. Saving frequently used accounts to your user profile saves you from having to type in multiple account numbers when submitting Requisitions. Once saved, a drop down menu is available on the Requisition resulting in quicker access to these accounts.



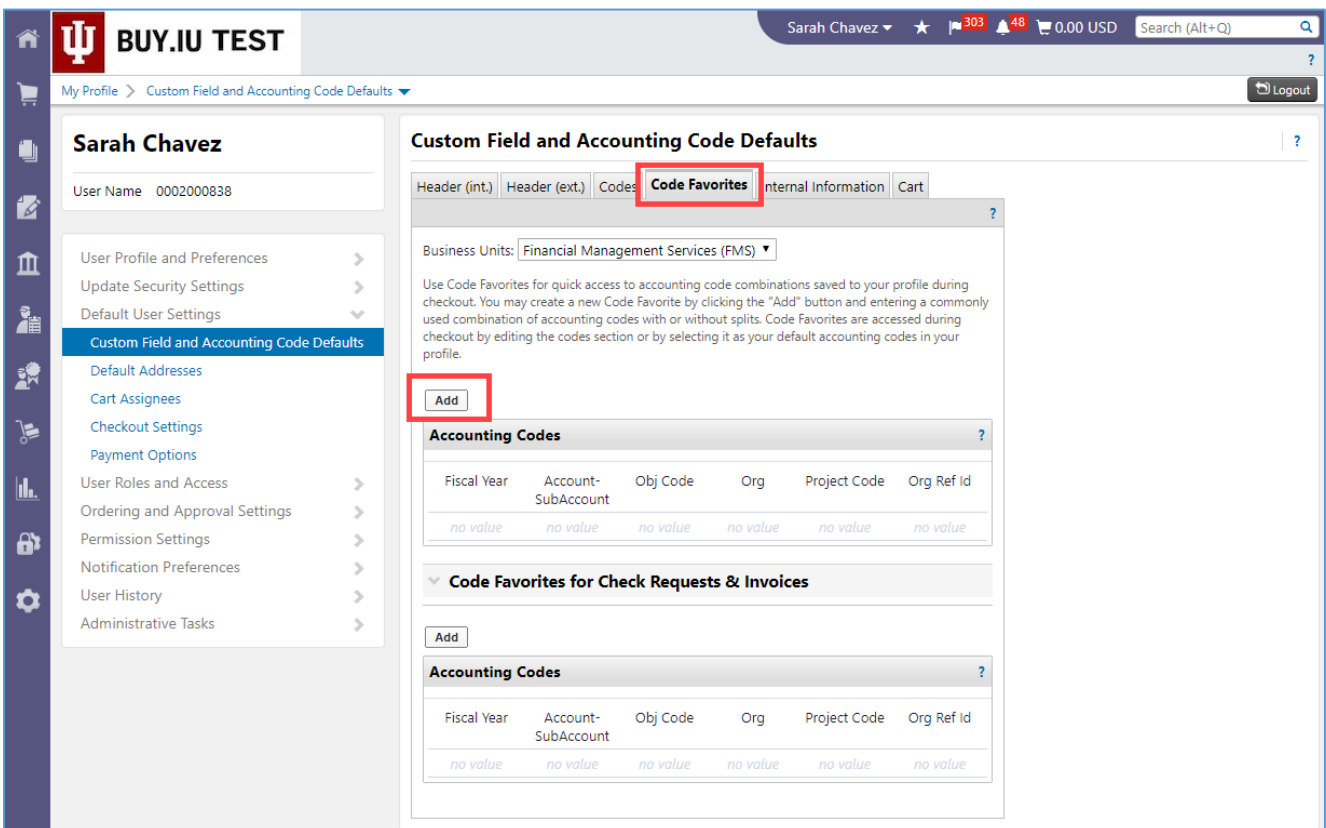
Access your user profile by clicking on your name in the upper right-hand corner and selecting **View My Profile**.



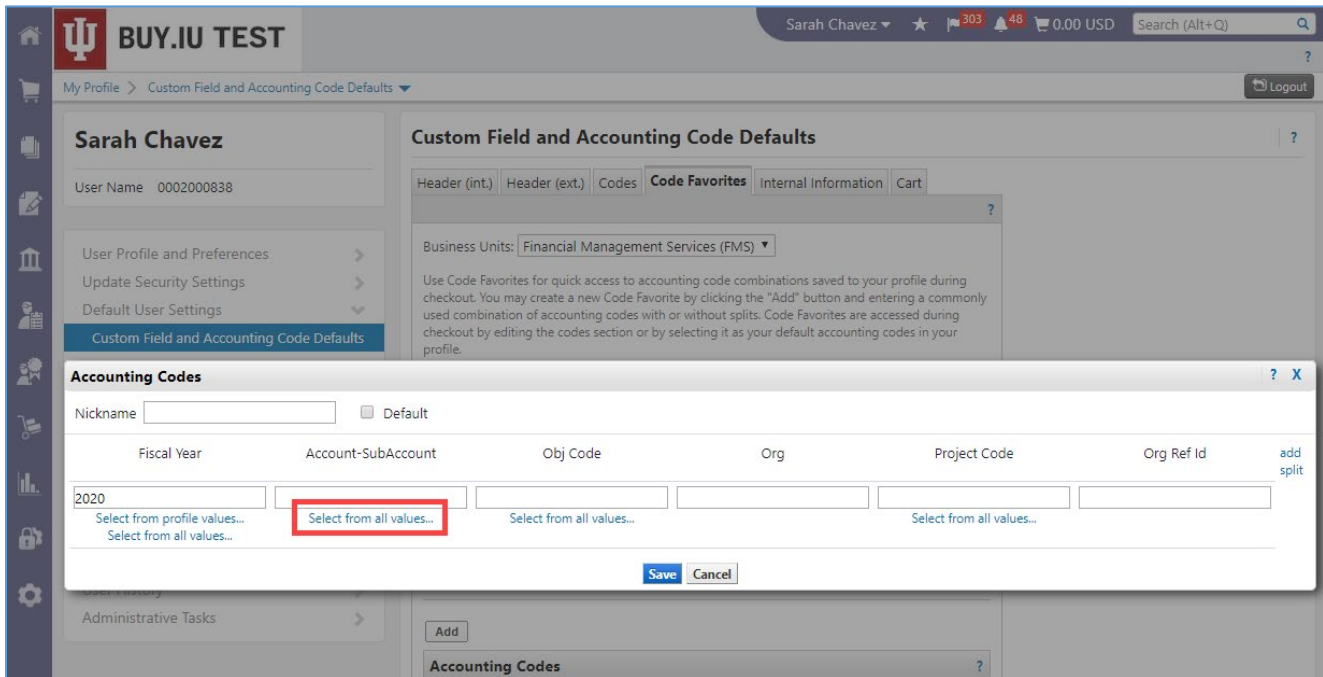
From here, select **Default User Settings** in the left hand menu, then **Custom Field and Accounting Code Defaults**.



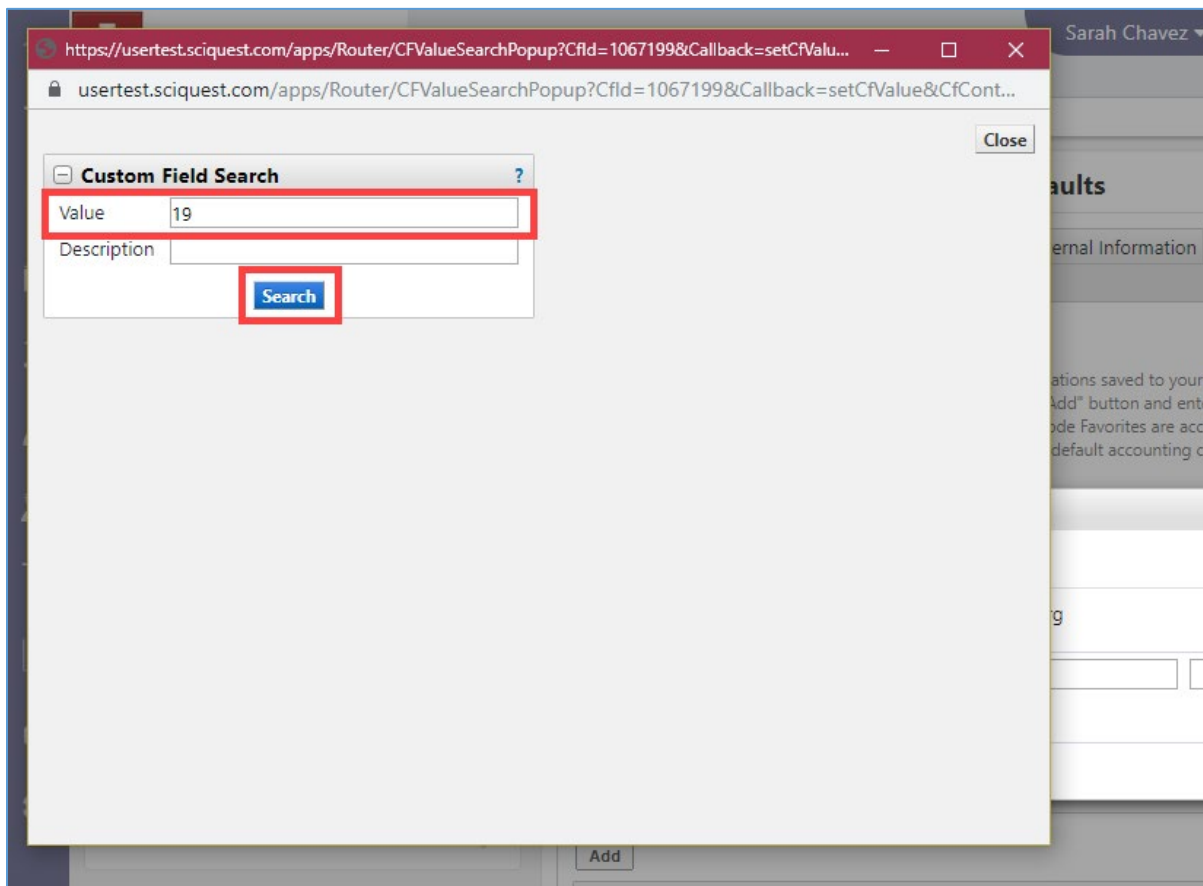
Save an account by navigating to the **Code Favorites** tab. Click the **Add** button above the **Accounting Codes** header to get started.



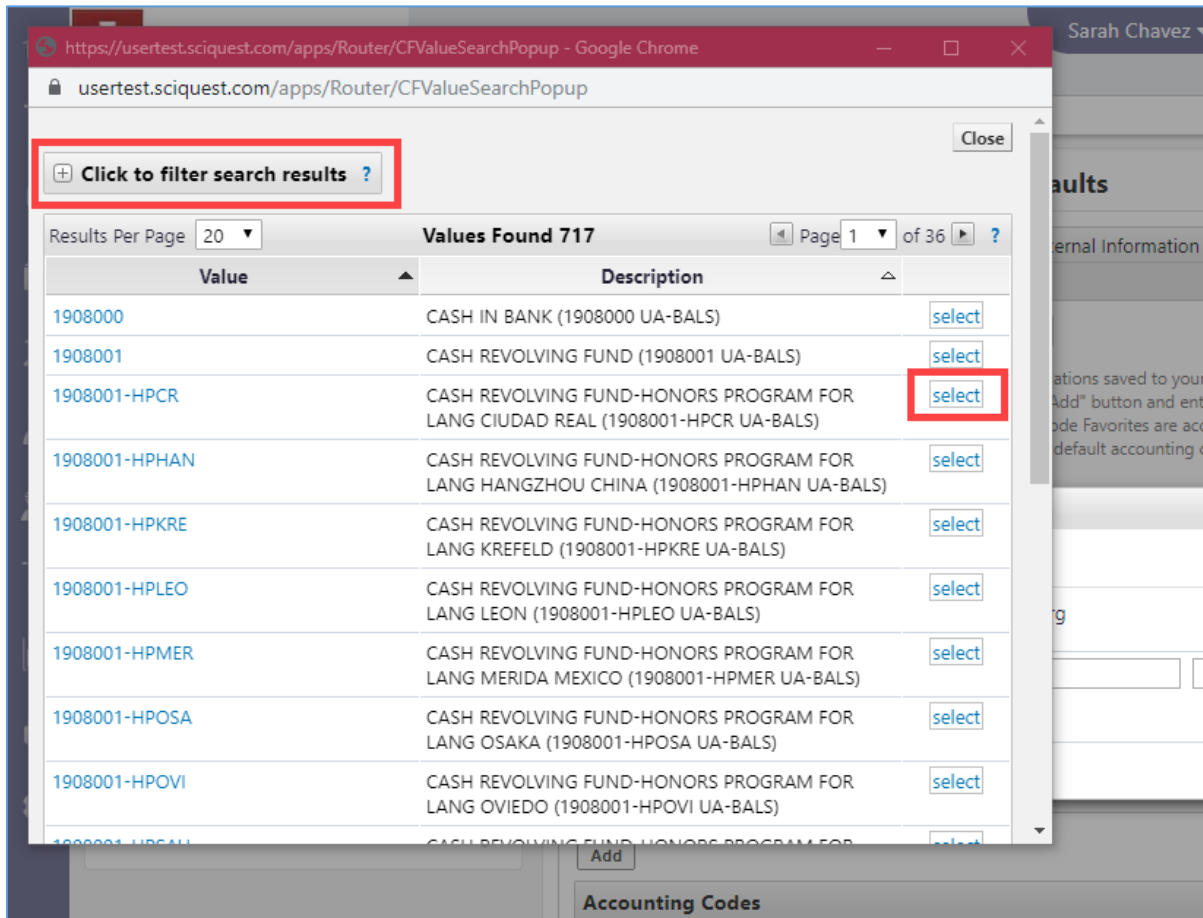
A new window opens. Click **Select from all values...** under the **Account-SubAccount** field to search for an account number.



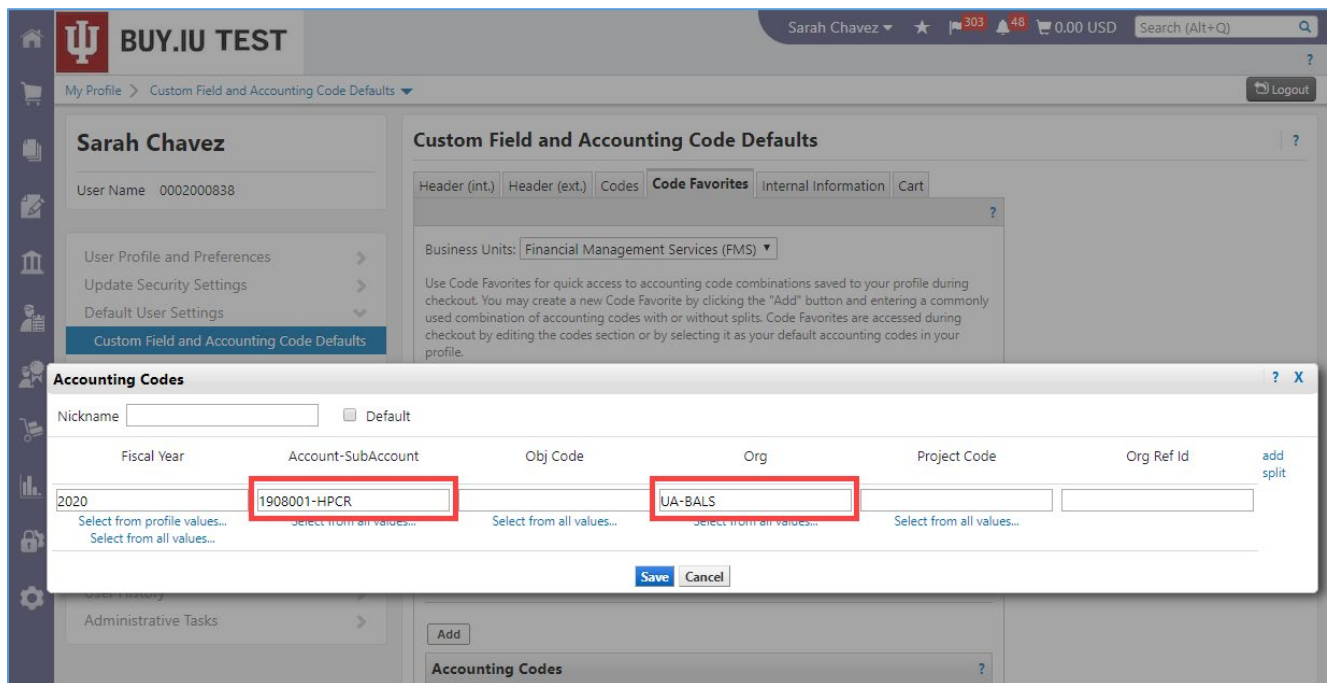
A search window opens. Search by account number using the **Value** field, or search by keyword by using the **Description** field. If you are saving a subaccount, search for the subaccount in the **Description** field. Wildcards are not required when searching. Click **Search** to return results.



To edit your search terms, click the **Click to filter search results** button at the top of your results. Click **select** next to the account you wish to save to return it to the previous field.



The **Accounting Codes** section updates to reflect the account, and in this case subaccount, you selected. The **Org** field is also updated and corresponds to the account.



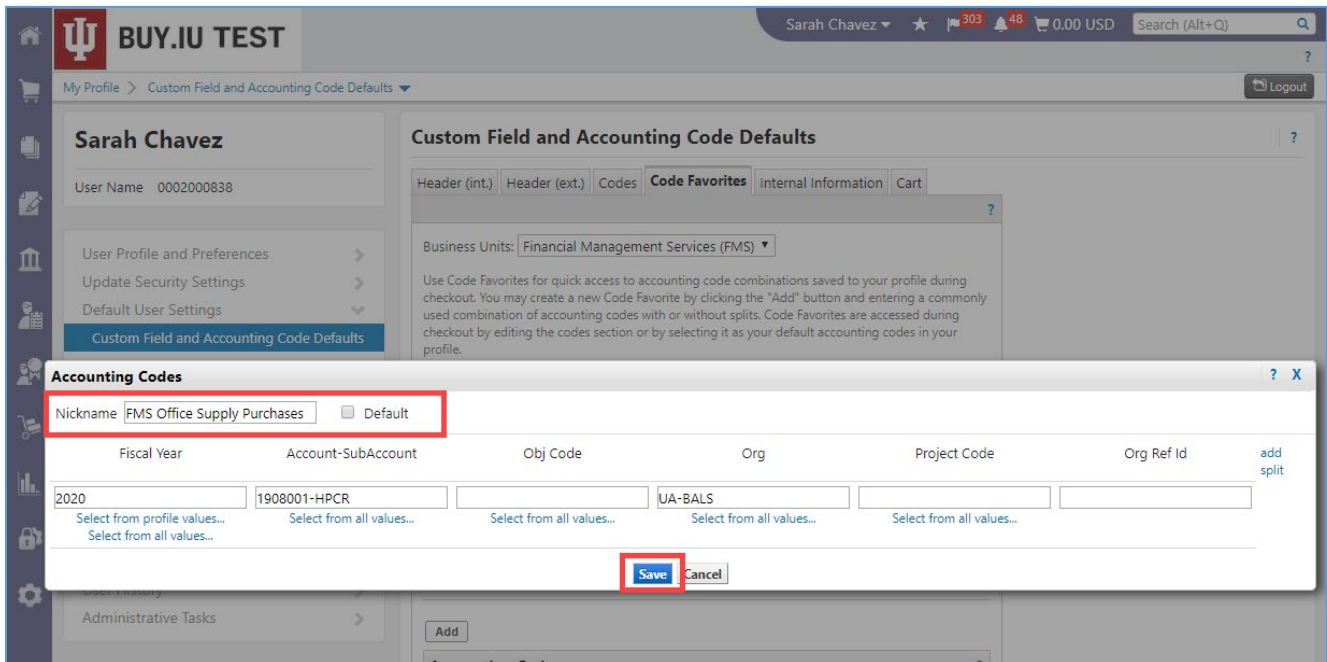
It's possible to save Object Codes, Project Codes, or Org Ref Ids to your profile, however we strongly discourage you from doing so. These details usually vary document to document. It's better to enter these details per Requisition.

Accounting code information may be manually entered.  
If entering manually, ensure that both the Account-Subaccount and Org fields are complete.

Enter a unique nickname for the account in the **Nickname** field. This nickname appears in the drop down menu of the Requisition when selecting a saved account; name the account something that is meaningful to you.

Checking the box next to **Default** causes BUY.IU to auto populate the account in all future Requisitions. Marking an account as default is optional, and you can always change the account number on the Requisition itself.

Click **Save** to save the account to your profile. The account is available in the Accounting Lines section of the Requisition.



The screenshot shows the 'Accounting Codes' dialog box in the BUY.IU TEST user profile. The dialog box contains the following fields and options:

- Nickname:** FMS Office Supply Purchases (highlighted with a red box)
- Default:**  (highlighted with a red box)
- Fiscal Year:** 2020 (with a dropdown arrow)
- Account-SubAccount:** 1908001-HPCR (with a dropdown arrow)
- Obj Code:** (empty field with a dropdown arrow)
- Org:** UA-BALS (with a dropdown arrow)
- Project Code:** (empty field with a dropdown arrow)
- Org Ref Id:** (empty field with a dropdown arrow)
- Buttons:** Save (highlighted with a red box) and Cancel

Repeat this process as many times as desired. Accounts saved in the **Accounting Codes** section are available for use with Catalog and Non-Catalog orders. Accounts saved in the **Code Favorites for Check Requests & Invoices** section are available for use with Check Requests.

Delete or edit a saved account at any time by clicking the appropriate button next to the account.

The screenshot shows the 'Custom Field and Accounting Code Defaults' page for user Sarah Chavez. The page includes a navigation sidebar on the left with options like 'User Profile and Preferences', 'Update Security Settings', and 'Custom Field and Accounting Code Defaults'. The main content area has tabs for 'Header (int.)', 'Header (ext.)', 'Codes', 'Code Favorites', 'Internal Information', and 'Cart'. Under the 'Code Favorites' tab, there is a section for 'Business Units' set to 'Financial Management Services (FMS)'. Below this is an 'Add' button and an 'Accounting Codes' table. The table has columns for 'Fiscal Year', 'Account-SubAccount', 'Obj Code', 'Org', 'Project Code', and 'Org Ref Id'. A single row is visible for the fiscal year 2020, with 'no value' in the 'Obj Code', 'Project Code', and 'Org Ref Id' columns. The 'Edit' and 'Delete' buttons for this row are highlighted with a red box.

Fiscal Year	Account-SubAccount	Obj Code	Org	Project Code	Org Ref Id
2020	1908001-HPCR CASH REVOLVING FUND-HONORS PROGRAM FOR LANG CIUDAD REAL (1908001-HPCR UA-BALS)	no value	UA-BALS	no value	no value