

Using ChartField String Favorites in myUF Marketplace

Overview

Save a ChartField string to your User Profile in myUF Marketplace, and add it instantly to your requisition or invoice's ChartFields by simply selecting it by its nickname. You may save and use more than one favorite.

Entering and Saving ChartFields String as a Favorite in the User Profile

1. Within myUF Marketplace, click **Your Name** at the top > click **View My Profile** > expand the **Default User Settings** menu > click **Custom Field and Accounting Code Defaults** > click the **Code Favorites** tab.

The top section of the of the

2. Click the **Add** button above Accounting Codes.
3. Enter a meaningful title in the **Nickname** field for easy retrieval, for example, enter "Smith NIH 0002484".
4. Enter the **Dept ID**. For example, enter "34050000".
5. Enter the **Fund** needed. For example, enter "201".
6. Enter the **Program Code**. For example, enter "2200".
7. Use the scroll bar at the bottom of the page and **Scroll** right to view the rest of the ChartFields.
8. In the **PC Business Unit** field, enter "GRANT" when using a Project number for Sponsored Projects.
9. Enter the **Project** number. For example, enter "00002484".
10. **Scroll** the window to the right until you see Activity ID.
11. Always enter a "1" for **Activity ID** when using sponsored projects.
12. **Scroll** the window to the left until you see the Save button.
13. Click **Save**.

AP Training25

User Name ufappgator25

User Profile and Preferences >

Update Security Settings >

Default User Settings v

Custom Field and Accounting Code Defaults

Default Addresses

Cart Assignees

Checkout Settings

Payment Options

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

Notification Preferences >

User History >

Custom Field and Accounting Code Defaults ?

Header (int.) Delivery Codes **Code Favorites** Internal Information Cart

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

Accounting Codes 1 ?

Smith NIH 0002484 Edit Delete

Dept Id	Fund	Program	Account	Budget Reference	Source Of Funds	Dept Flex	UFID	PC Business Unit	Project	Activity ID	CRIS
34050000	201	2200	no value	no value	no value	no value	no value	GRANT Sponsored Programs	00002484	1 Main	no value
DN- OPERATIVE DENTISTRY	C&G - FEDERAL RESTRICTEDs	INDIVIDUAL OR PROJECT RESEARCH							PSYCHOLOGICAL DISTRESS AMONG L		

Accounting Codes 2 ?

Dept Id	Fund	Program	Account	Budget Reference	Source Of Funds	Dept Flex	UFID	PC Business Unit	Project	Activity ID	CRIS
no value	no value	no value	no value	no value	no value	no value	no value				

Accounting Codes 1 ?

PO Business Unit

no value

These Accounting Codes are for Requisitions.

These Accounting Codes are for Check Requests and Invoices.

*This ChartField string favorite is now saved in the **User Profile** and can be added instantly to a requisition or invoice by its nickname.*

Using the ChartFields String Favorite in a Requisition or Invoice

1. From within your cart, click the **Proceed to Checkout** button or in the **Buyer Tab** in the Invoice.
2. Click the **ChartFields** tab to view the ChartFields for this requisition or invoice.
3. Click the **edit button** for ChartFields.
4. Open the **Select from Your Code Favorites** list.

- Click the nickname of the Code Favorites you need. For example, click the **Smith NIH 2484** list item. For example, in the requisition below, it added the Dept ID, Fund Code, Program Code, PC Business Unit, Project and Activity ID instantly.

- From here, you may add additional ChartFields needed, such as the Account Code.
- Click **Save**.

Editing the ChartFields String Favorite in the User Profile

- To edit the Favorite, click **Your Name** at the top > click **View My Profile** > click Custom Field and **Accounting Code Defaults**.
- Click the Code Favorites tab.
- Click the **Edit button** on the right.
- From here you may make any changes needed to your Favorite.
- Click **Save**.

Additional Assistance

Marketplace Help Desk

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