

How to Personalize the Reconcile Statements Page

OVERVIEW

Use the **Personalize** link to rearrange data entry fields on a page in myUFL to make entering and viewing information easier. You may move fields where they will be easy to find and use. Place them in a convenient order to avoid tabbing over fields that you do not use.

It is strongly recommended you use the **Personalize** link on the **Accounts Distribution** page to move ChartFields you regularly use to the left side of the page to avoid tabbing over fields each time.

STEPS

Navigate to the Reconcile Statements page in myUFL:

1. Click **Main Menu**
2. Click **Financials**
3. Click **Purchasing**
4. Click **Procurement Cards**
5. Click **Reconcile**
6. Click **Reconcile Statement**

Search for and retrieve statements for the PCard holder needed:

1. Click the **Look up Employee ID (Alt+5)** button.
2. Click the **Look Up** button to view the cardholders list and click on the link needed to select.
3. Click the **Search** button.

You can move a field to the front page permanently using the steps below. This needs to be done only once. Let's use the **Description** field as an example. By default, the **Description** field is under the Billing tab.

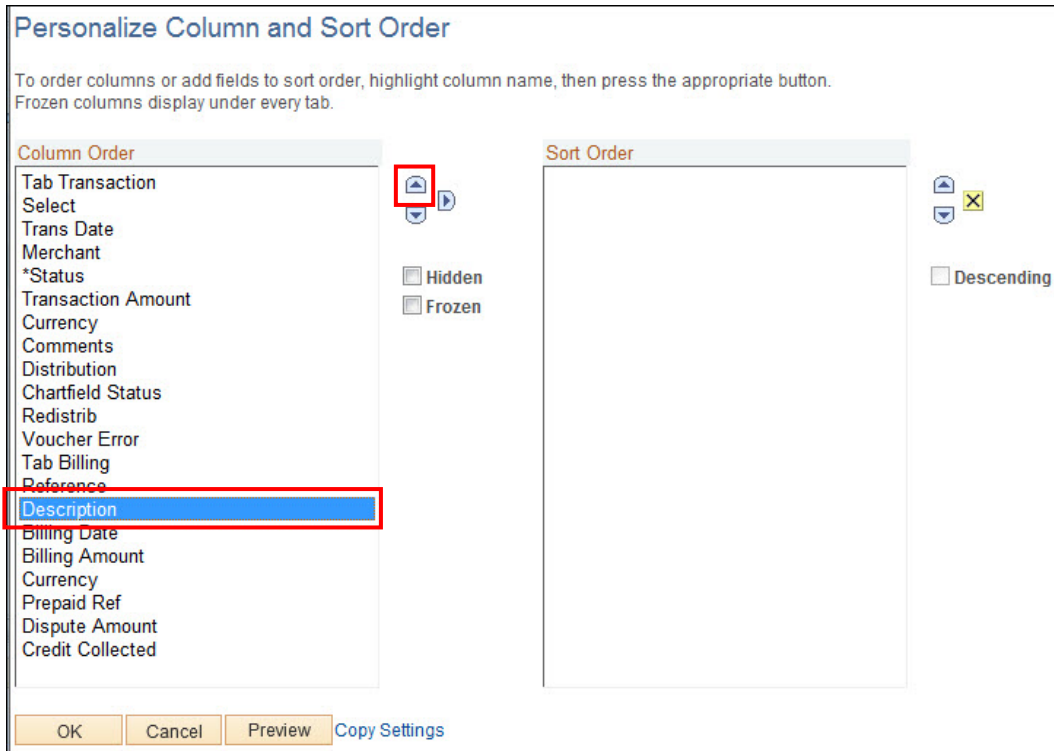
1. Click the **Personalize link** to change the positions of the columns and to move this field to the front page under the **Transactions** tab.

Transaction	Trans Date	Merchant	*Status	Transaction Amount	Currency	Chartfield Status	Redistrib	V
1	03/11/2015	DKC DIGI KEY CORP	Staged	143.22	USD	Valid	No	N
2	03/11/2015	CST THE COMPOSITE STORE	Staged	426.95	USD	Valid	No	N
3	03/11/2015	MCMaster-CARR	Staged	132.93	USD	Valid	No	N
4	03/12/2015	AMAZON MKTPLACE PMTS	Staged	222.20	USD	Valid	No	N

2. Click the **Description** list item to select it.

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3. Click the **Move Up** button repeatedly until the Description item is in the fourth position from the top on this list.
4. Click the **OK** button.



The **Description** column should now be on the front page (Transaction tab) for easy viewing and entering of information. It is **very important** that there is no information in the Sort Order field on the right.

Reconcile Statement							
Procurement Card Transactions							
Empl ID 98653214				Name Grimes, Rick non			
Card Number *****7970				Card Provider MBNA			
Bank Statement		Personalize Find View All First 1-9 of 15 Last					
Transaction	Billing						
Trans Date	Merchant	Transaction Amount	Description	*Status	Currency		
1	03/11/2015	DKC DIGI KEY CORP	143.22		Staged	USD	
2	03/11/2015	CST THE COMPOSITE STORE	426.95	3/17 Invoice Req	Staged	USD	

For additional help, please contact the PCard Team at 392-1331 or visit the [PCard website](#) or e-mail pcard@ufl.edu.