

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:

Click Main Menu > Click Purchasing > Click Procurement Cards > Click Reconcile > 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.

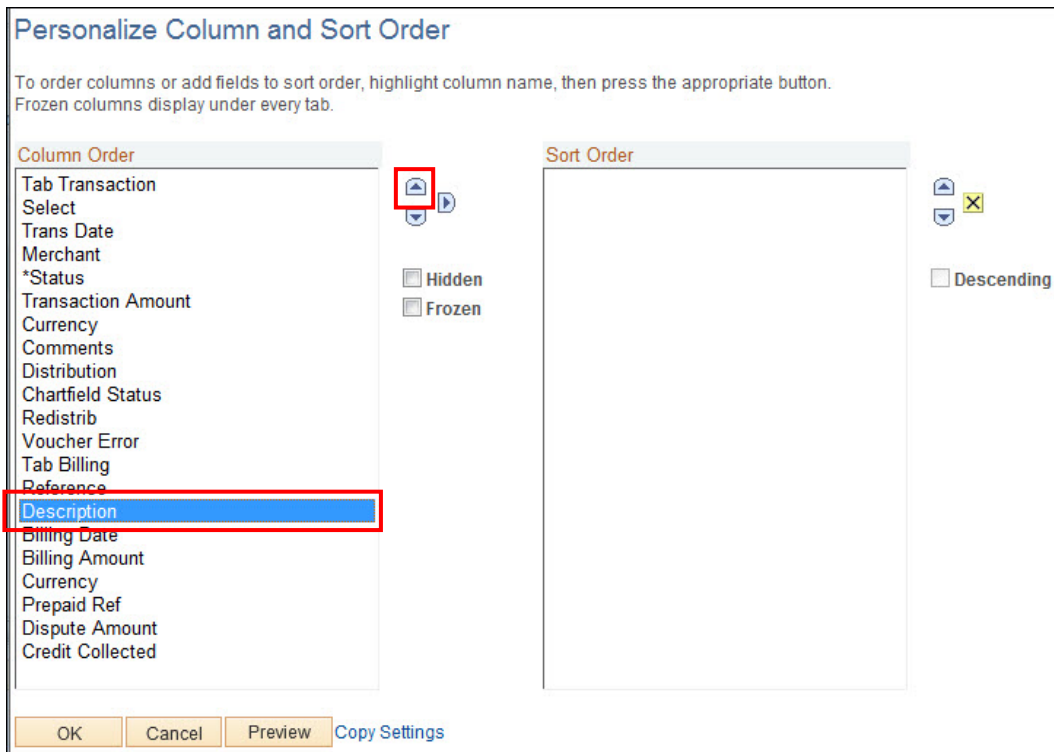
You can move a field to the front page permanently using the steps below. This needs to be done only once. Let's use the **Description** field as an example. By default, the **Description** field is under the Billing tab.

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.

Reconcile Statement							
Procurement Card Transactions							
Empl ID 98653214				Name Grimes,Rick			
Card Number *****7970				Card Provider MBNA			
Bank Statement							
Personalize Find View All Print Refresh							
First 1-9 of 15 Last							
Transaction Billing []							
	Trans Date	Merchant	*Status	Transaction Amount	Currency	Chartfield Status	Redistrib
1	03/11/2015	DKC DIGI KEY CORP	Staged	143.22	USD	Valid	No
2	03/11/2015	CST THE COMPOSITE STORE	Staged	426.95	USD	Valid	No
3	03/11/2015	MCMMASTER-CARR	Staged	132.93	USD	Valid	No
4	03/12/2015	AMAZON MKTPLACE PMTS	Staged	222.20	USD	Valid	No

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

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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	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	426.96	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.