



CU Marketplace Pilot Pro Tip: How do I create Profile Defaults?


What is it?

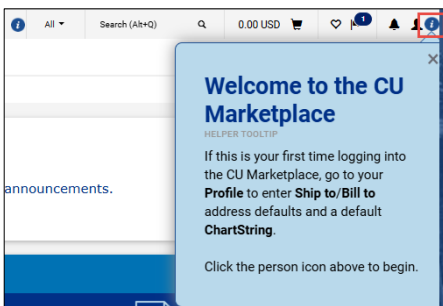
When creating Requisitions or Vouchers in the CU Marketplace, Initiators must ensure the Accounting Code (ChartString) is complete and accurate before submitting for approval. Requisitions also require Ship To and Bill To addresses.

To streamline your entries, set up favorite and default ChartField values in your CU Marketplace Profile, one set for Requisitions and another for Vouchers. Additionally, you can save default Ship To and Bill To addresses for Requisitions.


Refer to the [Modifying Profile Settings in the CU Marketplace job aid](#) for more details.

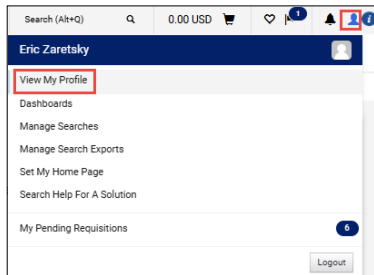
Viewing Instructions Directly in the CU Marketplace

A guide is available in the CU Marketplace to walk you through the steps of setting up your Profile defaults. Click the **information icon**  next to the Profile icon to launch the guide.

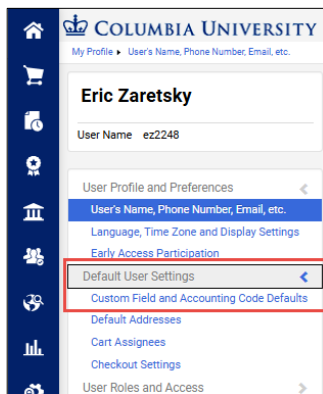


Setting Accounting Code (ChartString) Favorites and Defaults

1. Click the **Profile**  icon in the upper right corner of the CU Marketplace screen.

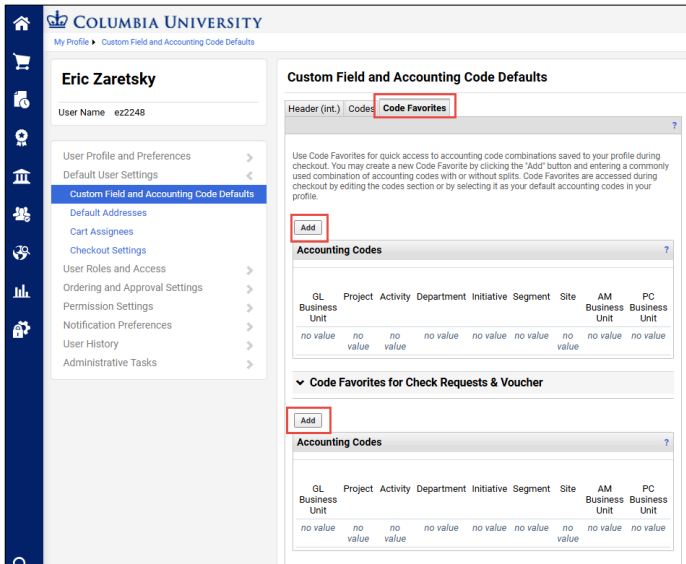


2. Click **View My Profile**.
3. Click **Default User Settings**.

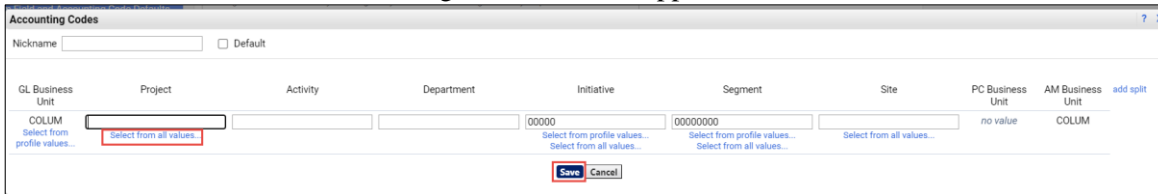


4. Under **Default User Settings**, click **Custom Field and Accounting Code Defaults**. In the **Code**

Favorites tab, there are two sections for adding favorites. The top section is for Requisitions. The bottom section is for Vouchers.



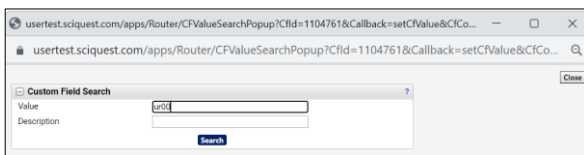
5. Click the **Add** button. The Accounting Codes window appears.



6. Enter a **Nickname** for the ChartString so that you can easily identify it. Click the **Default** checkbox to make this your default ChartString.

7. Enter the ChartField values. They must be entered in order left to right as the available values are dependent on the value in the previous field. You can leave fields blank in your Favorites. When you submit Requisitions and Vouchers, you must populate any blank ChartFields.

Click the **Select from all values** link to use the Custom Field Search for a field you are populating.



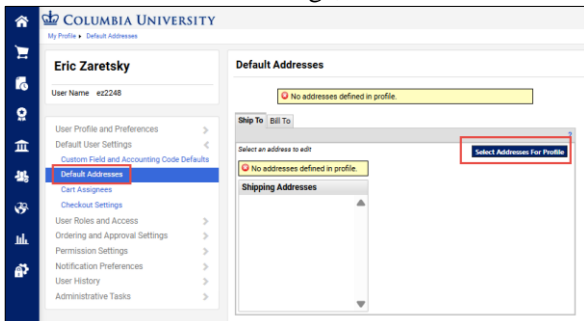
8. Click the **Save** button.

Click **Add** again to complete the details for additional ChartString favorites.

Note: Remember to add favorites in both the Requisition and Voucher sections, if needed, as they are not automatically available in both places.

Setting Default Ship To and Bill To Addresses

1. Under Default User Settings, click **Default Addresses**.



2. Select either the **Ship To** or **Bill To** tab to set the default for the desired address type.
3. Click the **Select Addresses for Profile** button. The Select Address Template dropdown appears.
4. Enter an address **Nickname / Address** to search for a matching address and click **Search**. A list of matches appears.

The screenshot shows the 'Default Addresses' page. At the top, there is a message: 'No addresses defined in profile.' Below this, there are tabs for 'Ship To' and 'Bill To'. A 'Select address to edit' section contains a message: 'No addresses defined in profile.' To the right is a 'Select Address for Profile' button. Below this is an 'Address Search' section with a text input field containing '630 w 132', a 'Results Per Page' dropdown set to '10', and a 'Search' button. Below the search results, it says 'Addresses Found: 1' and 'Page 1 of 1'. A table shows one result:

Name	Address
630West168thStreetFL01RM1132	Contact Name Eric Zaretsky 630 West 168th Street 630 West 168th Street RM/STE 1-132 FL 01 CUMC New York, NY 10032 United States

5. Select the desired matching address.

The screenshot shows the 'Default Addresses' page with the 'Edit Selected Address' form open. The form has tabs for 'Ship To' and 'Bill To'. A 'Select address to edit' section contains a message: 'No addresses defined in profile.' To the right are 'Select Address for Profile' and 'Delete Address' buttons. Below this is an 'Edit Selected Address' section with a 'Nickname' field containing 'Eric's Address' and a 'Default' checkbox checked. Below this is an 'ADDRESS' section with fields for 'Contact Name *', 'Contact Line 2', 'Address Line 1', 'Address Line 2', 'Address Line 3', 'City', 'State', 'Zip Code', and 'Country'. The values are: Eric Zaretsky, 630 West 168th Street, 630 West 168th Street, RM/STE 1-132 FL 01, CUMC, New York, NY, 10032, United States. A 'Save' button is at the bottom right.

You can enter a **Nickname**, select if this address will be your **Default**, or change the **Contact Name**.

6. Click **Save**. The address will appear in the Addresses list.

The screenshot shows the Columbia University user profile page for Eric Zaretsky. The user name is 'Eric Zaretsky' and the user ID is 'ez2248'. The page has a navigation menu on the left with options like 'User Profile and Preferences', 'Default User Settings', 'Custom Field and Accounting Code Defaults', 'Default Addresses', 'Cart Assignments', 'Checkout Settings', 'User Roles and Access', 'Ordering and Approval Settings', 'Permission Settings', 'Notification Preferences', 'User History', and 'Administrative Tasks'. The 'Default Addresses' section is active, showing the 'Edit Selected Address' form with the same address details as in the previous screenshot.

Click the **Select Addresses for Profile** button again within the Ship To or Bill To tabs to add additional addresses.

Click an address from the Addresses list to edit the settings or delete it.

Where do I get help?

Contact the Finance Service Center

<http://finance.columbia.edu/content/finance-service-center>

Log an incident or request a service via Service Now

<https://columbia.service-now.com>