Purpose: To define procedures for creating default user settings. Information entered in here will be placed on the Requisition. The intent is to save unnecessary and repetitive input. These values can be changed if necessary.

Navigation: Navigate in Bull Marketplace > View My Profile

Notes: Users must have a valid Net ID to be able to navigate the system

<table>
<thead>
<tr>
<th>Steps</th>
<th>View My Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
</tr>
<tr>
<td>1.1</td>
<td>Click the icon that looks like a “person” on the upper right-hand corner.</td>
</tr>
<tr>
<td>1.2</td>
<td>Click on View My Profile</td>
</tr>
<tr>
<td>1.3</td>
<td>The screen below appears:</td>
</tr>
</tbody>
</table>

You do not have any recent orders

You can view your profile, dashboards, manage searches, manage search exports, set your home page, and search for help. You can also access your shopping cart and view your recent orders.
NOTE: The information in your profile is imported from FAST. These cannot be updated in the Bull Marketplace. To change any of these information, a request must be submitted in FAST.
2.1 Click **Custom Field and Accounting Code Defaults**
2.2 **Header (Int) tab** - select the PO Business Unit you belong to

**NOTE:** The PO Business Unit represents the entity for which the purchase is being made and will default in from the User’s default setup. *This value can be changed if necessary.* The available values are as follows:

- TAMPA – Tampa Campus purchases
- STPTE – St Petersburg Campus purchases
- SRSTA – Sarasota Campus purchases

The *General Ledger* Business Unit used for accounting purposes is always USF01.

2.3 **Delivery tab**

- This is the user’s location or campus mail stop. It identifies the building and the room Code for Central Receiving to deliver the goods.

2.4 Click Edit
2.5 Click Create New Value.
2.6 Under “Value” field enter your campus mail stop or click “Search” to look for specific location
2.6 Select specific location and click Add Values
2.7 Codes tab

- This is like a Speed Chart. We advise to leave it at “No Default Value” as user might be using a different accounting codes (chartfield string) on different transactions.

2.8 Code Favorites tab

- Here you enter chartfield string(s) you often use for requisitions.

You can add and save as many “code favorites” as you want. This is like the Requisition Default field in FAST. If you do not have any saved “code favorites” you will be prompted to enter your chart field string manually every time you submit a requisition.

NOTE: Chartfield String – identifies where the cost of the purchase will be charged to in the General Ledger. Frequently changed chart fields are Fund, Product, and Initiative.

If a Project is being used, a PC Business Unit must be selected:
- Sponsored Research projects use PC Business Unit GRT01
- Construction (PECO) projects use PC Business Unit USF01

All projects require an Activity ID to be selected
2.9 Click “Add”

**Custom Field and Accounting Code Defaults**

Business Units: Default Code Favorites

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.

![Add button highlighted]

2.10 Click “Select from all values”

2.11 Type the information in the “Value” or “Description” field (if you know it) or click Search for more options

![Custom Field Search dialog box]
2.12 Make sure you assign a "nickname" to your code favorites. Click Save when done.

NOTE: DO NOT ENTER AN ACCOUNT NUMBER
Account numbers may vary depending on the Commodity Code.

2.13 Code Favorites for Check Requests & Invoices
- This is intended for Payment Request Form chartfield information.
  You can also add and save as many "code favorites" as you want.
  To add more "code favorites" repeat Steps 2.9 – 2.12.

3 Default Addresses
- Shipping Address

3.1 Click Select Addresses for Profile
NOTE: For addresses outside the campus use “One Time Address”

- Billing Address
  NOTE: This is always defaulted to Payment Services

**Cart Assignees**
- This feature is intended for Shoppers. They can assign their cart to another Shopper (Ex: Accountable Officer for review) or to a Requestor to convert their draft cart to a Requisition.

NOTE: A Shopper can be any USF user without a FAST role. They can only order using the Punch-out Suppliers. They cannot submit the requisition (Place Order) to convert to a Purchase Order.

4.1 Click on Add Assignee

4.2 If you know your department Requestor’s name enter it in the field below and click Search.
4.3 When you find your Requestor’s name click “Select”
User Roles and Access

- This is where you find your assigned Role. Roles are set-up in FAST.

Shopper – assigned to any USF user without a FAST role
Requestor – assigned to a USF user with FAST Req Initiator role
Approver – assigned to a USF user with a FAST Req Approver/Req Manager role
Receiver – assigned to a USF user with a FAST Receiver role
Notification Preferences

NOTE: Notification Preferences are defaulted to Email & Notification. The intent is for the user to identify which stage or process they want to get notified. There are several sections in this field that is imperative for users to get notified (i.e. Shopping, Carts & Requisitions; Change Requests; Purchase Orders; Accounts Payable; and Form Requests).

6.1 You can edit Notification Preferences by selecting a field and click on “Edit Section”

Type of Notifications:
None – you won’t get any notification on the selected section
Email – an email will be sent to the email address associated to your profile
Email & Notification – you will get notified via email and also in your Bull Marketplace profile
Notification – it will appear on the upper right-hand corner of your Header marked by a bell icon
To go back to your Dashboard click Home from the fly-out menu.