## Default User Settings

### 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 User Name in Upper Right Hand Corner > View My Profile

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

### Steps

<table>
<thead>
<tr>
<th>Section Header</th>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 View My Profile</td>
<td></td>
</tr>
<tr>
<td>1.1</td>
<td>Click your name 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>

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.
Default User Settings

2.1 Click **Custom Field and Accounting Code Defaults**

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<table>
<thead>
<tr>
<th>Custom Field Name</th>
<th>Default Value</th>
<th>Description</th>
<th>Edit Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO Business Unit</td>
<td>No Default Value</td>
<td></td>
<td>Edit</td>
</tr>
</tbody>
</table>
2.2 **Header (Int) tab** - select the PO Business Unit you belong to

- **Custom Field and Accounting Code Defaults**
- **Custom Field Name**: PO Business Unit
- **Default Value**: No Default Value

**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.

![Custom Field and Accounting Code Defaults](image)

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

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0662104400-BUDGET</td>
<td>WUSF-FM Community Service Gran-BUDGET</td>
</tr>
<tr>
<td>0662104500-BUDGET</td>
<td>WUSF Veterans Coming Home - P-BUDGET</td>
</tr>
<tr>
<td>0662104600-BUDGET</td>
<td>WUSF-FM Radio Station Grant FL-BUDGET</td>
</tr>
<tr>
<td>0662104700-BUDGET</td>
<td>WUSF Education Innovation Plan-BUDGET</td>
</tr>
<tr>
<td>0662104701-BUDGET</td>
<td>WUSF Education Innovation Plan-BUDGET</td>
</tr>
<tr>
<td>0662104800-BUDGET</td>
<td>WUSF-FM Community Service Gran-BUDGET</td>
</tr>
<tr>
<td>0662104900-BUDGET</td>
<td>WUSF StoryCorps: On Small Step-BUDGET</td>
</tr>
<tr>
<td>0662105000-BUDGET</td>
<td>WUSF American Homefront WUNC 5-BUDGET</td>
</tr>
</tbody>
</table>
2.9 Click “Add”

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
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 are added based on the Item Category on each line of the requisition

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.
2.14 Occasionally there is a need to split a chartfield. This may be for a different Product or Fund. For purchase of some items or services, the cost is being split between two or more areas and the cost has to reflect this split distribution.

If splitting chartfields, click on “Add/Split” (further right end) and enter another chartfield information as shown on Step 2.10 - 2.11. Click Save when done.

2.15 You also have the option to distribute by % of Price or % of Quantity.

3 Default Addresses

- Shipping Address

3.1 Click Select Addresses for Profile
Default User Settings

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

4 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”

Select “Override”. A drop down menu will appear and will give you the option to choose between None; Email; Notification; or Email & Notification

- 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 home page click from the fly-out menu.