

PROCUREMENT: Favorite Charge Account and Deliver-to Location

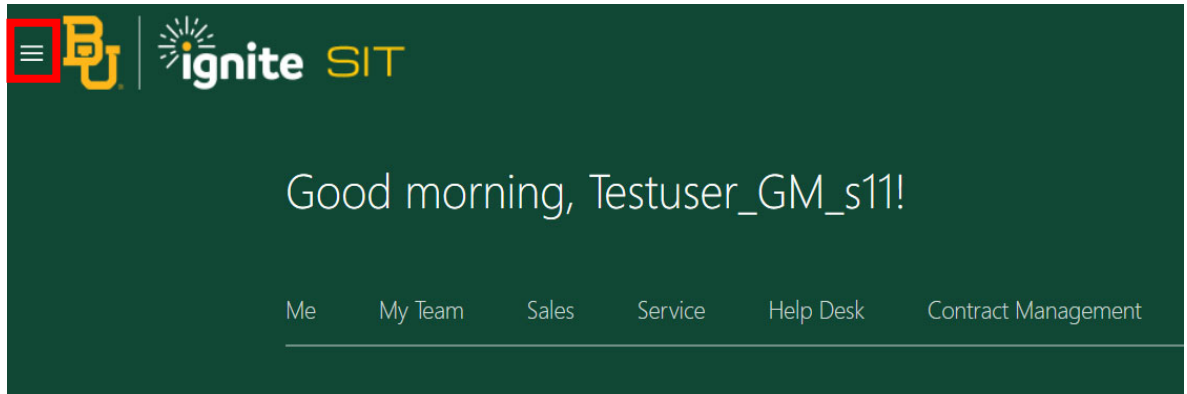
Updating Requisition Preferences

- This job aid is intended for use by all Shoppers before they create their first requisition.
- Before creating a requisition, all Shoppers must set up a Favorite Charge Account and a default Deliver-to Location in their requisition preferences.
- Shoppers can create multiple Favorite Charge Accounts within their profile which simplifies and streamlines the requisition entry process.
- Shoppers will be unable to successfully complete a requisition until this information is recorded in their profile.

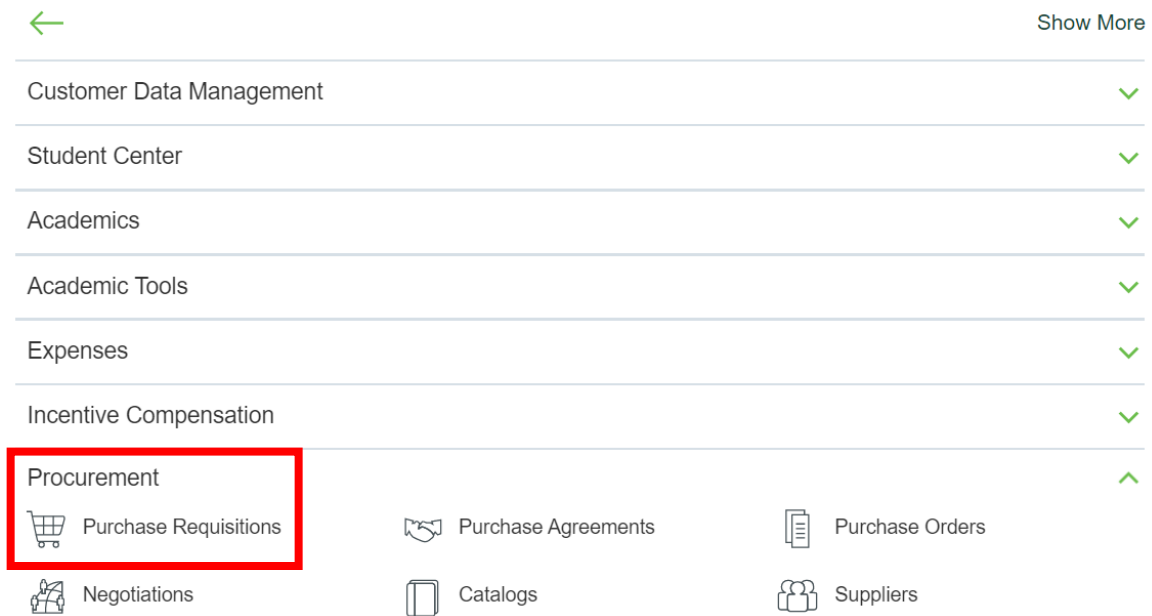
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I. Navigating to Purchase Requisitions

- I. The **Purchase Requisitions** task may be accessed in two ways:
 - a. (Option 1) Click the **Navigator** icon in upper left-hand corner of the Ignite landing page.

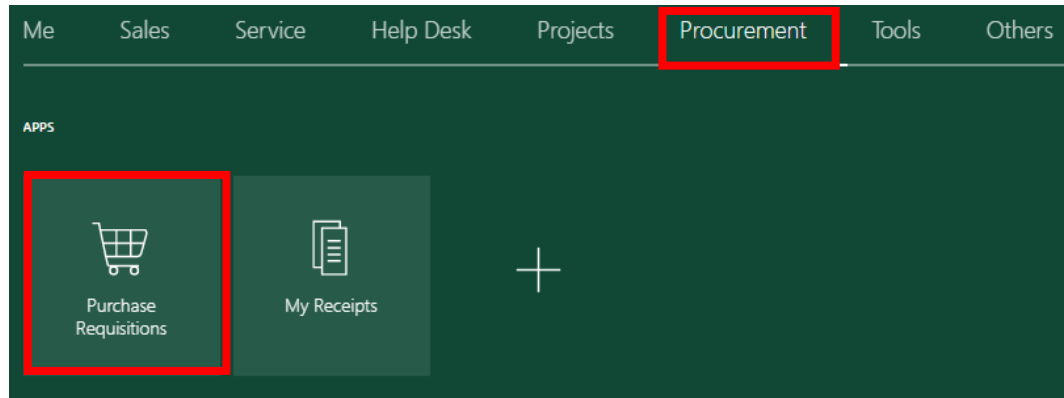


- b. Under the **Procurement** section, click the drop-down arrow, and select **Purchase Requisitions** from the drop-down list.



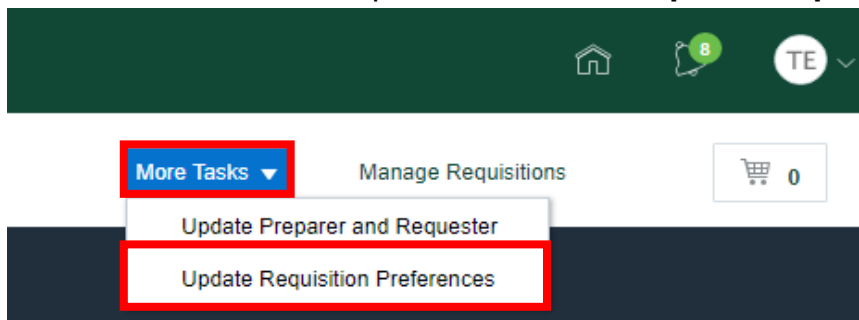
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- c. (Option 2) Under the **Procurement** heading on the home page, scroll down and click on the **Purchase Requisitions** tile on the Main Page.



2. Edit Requisition Preferences

- I. Select the **More Tasks** dropdown. Then, select **Update Requisition Preferences**.



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- Under Shipping and Delivery, input a **Deliver-to Location** (likely your department name or office address). Then, under Favorite Charge Accounts add a **Charge Account** and **Nickname** to easily remember which account is saved. Remember, you can add as many favorite charge accounts as you would like. Click **Save and Close**.

Edit Requisition Preferences

Requisitioning BU BAYLOR

Shipping and Delivery

Requester Testuser_PO_s5

* Deliver-to Location Baylor Police

Billing

Projects

Project Number

Task Number

Expenditure Type

Expenditure Organization

Contract Number

Funding Source

Favorite Charge Accounts

Primary	* Nickname	* Charge Account	Delete
<input checked="" type="checkbox"/>	office supplies	110-10745-100-1000000-00000-701-01	<input type="checkbox"/>

Save and Close Cancel