

# Default Account Codes

## Default account code set-up

1. SELECT your Name
2. SELECT View My Profile

The screenshot shows the Ball State University user profile page. The main content area is titled "Custom Field and Accounting Code Defaults" and contains a table with the following data:

Custom Field Name	Default Value	Description	Edit Values
Account	No Default Value		Edit
Activity	No Default Value		Edit
Chart	1	Ball State University COA	Edit
Fund	100100	Current Operating Fund	Edit
Location	No Default Value		Edit
Organization	134020	Purchasing Services	Edit
Program	2006	Institutional Support	Edit
Work Order Number	No Default Value		Edit

On the right side of the page, a dropdown menu is open, showing options: "View My Profile", "Dashboards", "Set My Home Page", "Logout", "Search Help For A Solution", "My Pending Requisitions", "My Recently Completed Requisitions", "My Pending Purchase Orders", and "My Recently Completed Purchase Orders".

Annotations in the image include:

- A box labeled "View My Name and Profile" pointing to the top of the dropdown menu.
- A box labeled "Custom Field and Accounting Codes Default" pointing to the "Custom Field and Accounting Code Defaults" menu item in the left sidebar.

# Default Account Codes

## Default Account Code creation

- 4. SELECT the **Edit Button**
- 5. Next, SELECT **“Create New Value”**

**Custom Field and Accounting Code Defaults**

Header (int.) Codes Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Fund	100100	Current Operating Fund	Edit

Edit Values Close

Create New Value

Value	Description
100100	Current Operating Fund

\* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

# Default Account Codes

## Default Value Search

6. Enter a value or Description and then click **Search**.
7. SELECT the box aligned with the account code value by checking boxes, and then select **“Add Values”**

The screenshot displays the 'Custom Field and Accounting Code Defaults' application window. It features a tabbed interface with 'Codes' selected. A table lists custom field values, with 'Fund' having a default value of '100100' and description 'Current Operating Fund'. Below this, a 'Search For Value' dialog is open, showing search criteria for 'Fund' with a value of '100100'. A search results window is also open, displaying one result: '100100 Current Operating Fund', which is selected with a checkmark. The 'Add Values' button is highlighted in the results window. A red arrow points from the text '“Add Values”' in the instructions to this button.

**Custom Field and Accounting Code Defaults**

Header (int.) **Codes** Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Fund	100100	Current Operating Fund	Edit

Edit Values Close

Create New Value

Value	Description
100100	Current Operating Fund

**Search For Value**

Field Name: Fund  
Value: 100100  
Description:   
Results Per Page: 5

Search

Results Found: 1 Page 1 of 1

Select	Value	Description
<input checked="" type="checkbox"/>	100100	Current Operating Fund

Add Values Back to Search

\* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

# Default Account Codes

## Account Code selection

- CLICK ON the **Create Value** to enter in the value of the code to set as default selection.
- ENTER the code value and then SELECT code by checking **Select Code Box**.
- SELECT the **“Default”** box, for the code you would like for the main default code.
- SELECT **Save**
- CLICK-ON the tab labeled, **“Codes”** at the top to return to the default set up window.
- Repeat these steps to set the defaults for all of the organization and Program Codes needed for your office.

The screenshot shows the 'Custom Field and Accounting Code Defaults' window. The 'Codes' tab is selected. A table lists custom field values for 'Fund'. A 'Create New Value' dialog is open, showing a list of values with '100100 Current Operating Fund' selected. An 'Edit Existing Value' dialog is also open, showing the same value with the 'Default' checkbox checked. A search results window shows the selected value. Callouts point to these elements:

- CODES TAB**: Points to the 'Codes' tab in the main window.
- CREATE VALUE**: Points to the 'Create New Value' button.
- CODE VALUE**: Points to the '100100' value in the 'Create New Value' dialog.
- SELECT CODE BOX**: Points to the checked checkbox in the 'Create New Value' dialog.
- Edit Existing Value**: Points to the 'Edit Existing Value' dialog.
- SAVE the Default Code**: Points to the 'Save' button in the 'Edit Existing Value' dialog.
- DEFAULT selection**: Points to the checked 'Default' checkbox in the 'Edit Existing Value' dialog.