



Benefits of Using Favorite Accounts

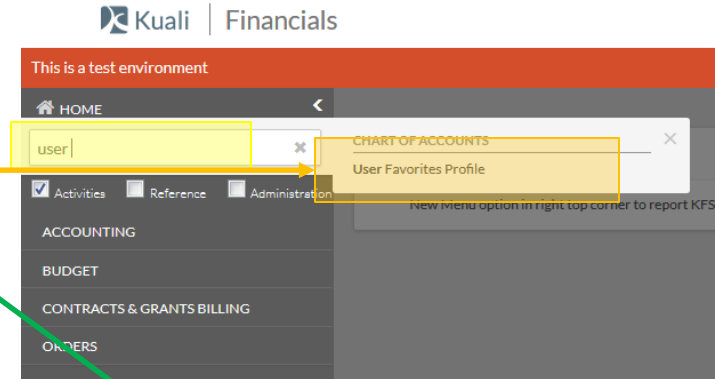
The screenshot displays the 'ITEMS' section of the KFS system. At the top, there are several action buttons: 'Setup Distribution', 'Remove Accounts From All Items', 'Remove Commodity Codes From All Items', 'Expand All Accounts', and 'Collapse All Accounts'. Below these is the 'CURRENT ITEMS' section, which contains a table with columns for ITEM TYPE, QUANTITY, UOM, CATALOG #, COMMODITY CODE, DESCRIPTION, UNIT COST, and EXTENDED COST. The first row shows 'Qty' with a quantity of '1.00', UOM 'CT CARTON', CATALOG # 'HAMB6780', COMMODITY CODE '14111507', and DESCRIPTION 'Great White 50 Recycled Copy Paper, 20-lb, 8-1/2 x 11, White, 5000/Carton'. Below the table, there is a 'Favorite Account' dropdown menu with a list of accounts: 'Procurement, G264750', 'Supplier Show, G264751', and 'University cell phones, G203700.6120'. The 'TOTALS' section at the bottom shows a 'Grand Total' of '28.98'.

1. An e-SHOP user with a primary favorite account and a default ship-to address, can simply click calculate and submit in the KFS requisition to release orders.
2. It is not possible to add an invalid or expired account to your favorites. Note: Accounts that expire **after** they have been added to a favorites list will be stopped at the requisition when applied to a line item
3. You don't have to remember multiple accounts



Before you can use the Favorites feature, you must build your list.

1. Locate the link for “User Favorite Accounts” by typing “User” in the search box.
2. Click on **User Favorites Profile**.
3. Select “Create New” the first time you start
4. Search for your existing profile using your **NetID** and edit your profile



User Favorites Profile Lookup

User-Principal Name: Flaherty, Mary Lourdes

Account Nickname:

Account Number:

Sub-Account Code:

Sub-Object Code:

Organization Reference Id:

Favorite Account Active: Yes No Both

Active Indicator: Yes No Both

Chart Code:

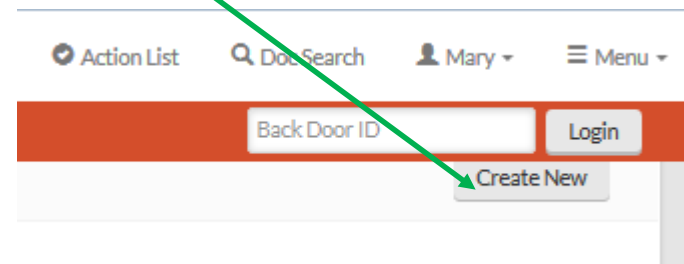
Object Code:

Account Name:

Search Results

Account Number	Account Nickname	Sub-Account Code	Object Code	Sub-Object Code	Organization Reference Id	User Profile Active	Favorite Account Active
00000000	UNIVERSITY CLEARING		0000			Yes	Yes
00000000	UNIVERSITY CLEARING		0000			Yes	Yes
00000000	UNIVERSITY CLEARING		0000			Yes	Yes

Search Clear Cancel





DOCUMENT OVERVIEW

OVERVIEW

* Description: Explanation:

Organization Document Number:

FAVORITE ACCOUNT

NEW FAVORITE ACCOUNT

Account Nickname:

* Chart Code: IT

* Account Number:

Account Name:

Sub-Account Code:

Object Code:

Sub-Object Code:

Project Code:

Organization Reference Id:

Primary:

Active Indicator:

To create a favorite account you will **need** to:

1. Enter a description of what you are doing (i.e., Original Accounts)
2. Enter the account number to be saved

You have the **option** to:

3. Give the favorite account a name to help you identify it (e.g., project name, event, faculty name)
4. Enter an object code (which is required in KFS requisition)
5. Create multiple favorites with the same account but different object codes
6. Designate a primary account

Click ADD for every favorite

Click Submit when done creating favorites



Editing your Favorite Accounts List

1. Search for your profile
2. Select edit next to the appropriate favorite
3. Add a new favorite
4. Edit an existing favorite
5. Delete
6. Submit

User Principal Name: @Flaherty,Mary Lourdes

Active Indicator: Yes No Both

Account Nickname:

Chart Code:

Account Number:

Object Code:

Sub-Account Code:

Account Name:

Sub-Object Code:

Project Code:

Organization Reference Id:

Primary:

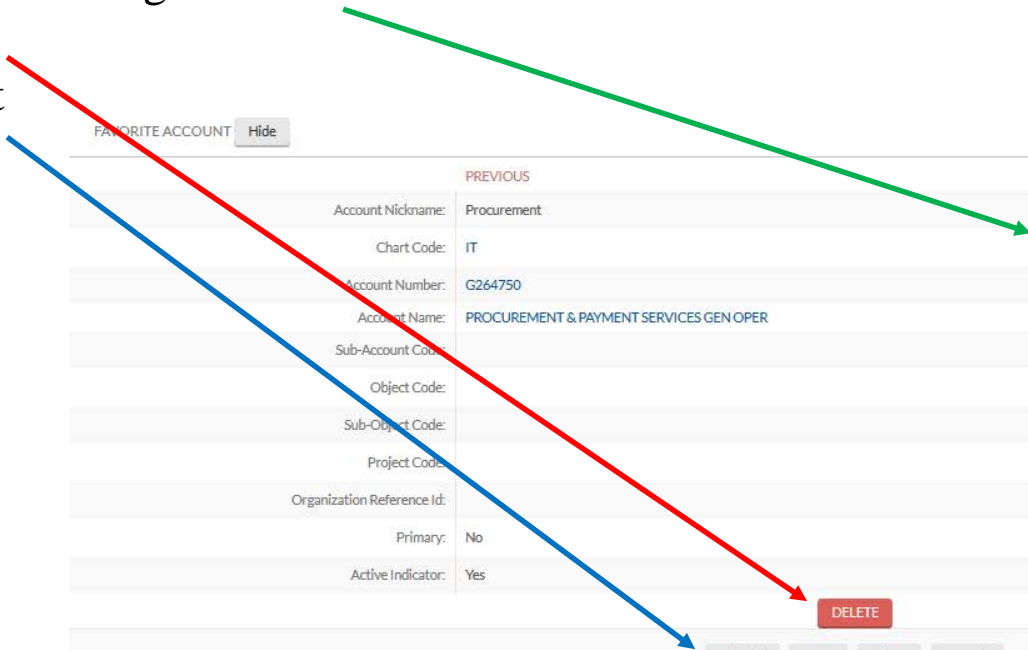
Search Results 1-3 of 3

Actions	Person Name	Account Nickname	Account Number	Sub-Account Code	Object Code	Sub-Object Code	Organization Reference Id	User Profile Active	Favorite Account Active
edit	Flaherty, Mary Lourdes	Procurement	G264750					Yes	Yes
edit	Flaherty, Mary Lourdes	Supplier Show	G264751					Yes	Yes
edit	Flaherty, Mary Lourdes	University cell phones	G203700		6120			Yes	Yes

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

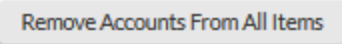
FAVORITE ACCOUNT

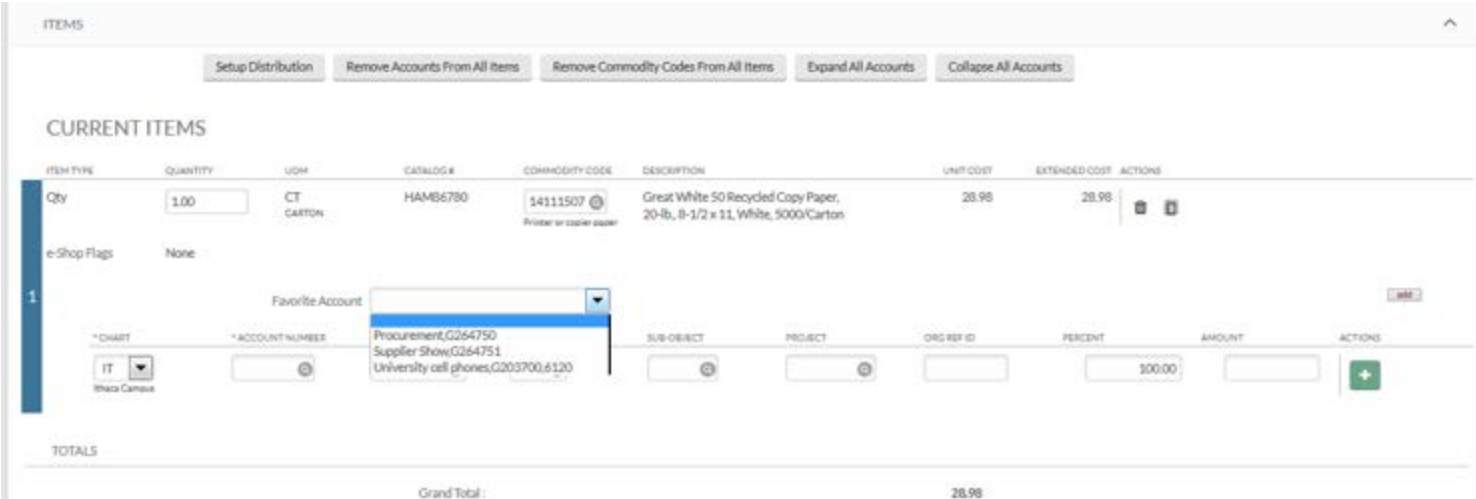
PREVIOUS	PROPOSED
Account Nickname: Procurement	Account Nickname: <input type="text" value="Procurement"/>
Chart Code: IT	* Chart Code: <input type="text" value="IT"/>
Account Number: G264750	* Account Number: <input type="text" value="G264750"/>
Account Name: PROCUREMENT & PAYMENT SERVICES GEN OPER	Account Name: PROCUREMENT & PAYMENT SERVICES GEN OPER
Sub-Account Code: <input type="text"/>	Sub-Account Code: <input type="text"/>
Object Code: <input type="text"/>	Object Code: <input type="text"/>
Sub-Object Code: <input type="text"/>	Sub-Object Code: <input type="text"/>
Project Code: <input type="text"/>	Project Code: <input type="text"/>
Organization Reference Id: <input type="text"/>	Organization Reference Id: <input type="text"/>
Primary: No	Primary: <input type="checkbox"/>
Active Indicator: Yes	Active Indicator: <input checked="" type="checkbox"/>





Other Considerations

- An e-SHOP cart with multiple vendors still creates multiple requisitions, which have to be retrieved from your action list
- To use the account distribution (with favorite accounts), click  prior to distributing an account to multiple line items in a requisition. Clicking this button removes the “primary favorite” which is already present and allows you to distribute to all items using a different account number or non-primary favorite.



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