

# Setting Up Your AggieBuy Profile

## What's Required?

All the *required* information for your AggieBuy profile is imported automatically each time you log in. This includes your name, phone number, email address, and department. Your phone number is imported from the Campus Directory, so please check your record there to make sure you have a phone number entered. If you don't, go here to enter it:

<https://directory.ucdavis.edu/listings/index.jsp?mothraid=edit>

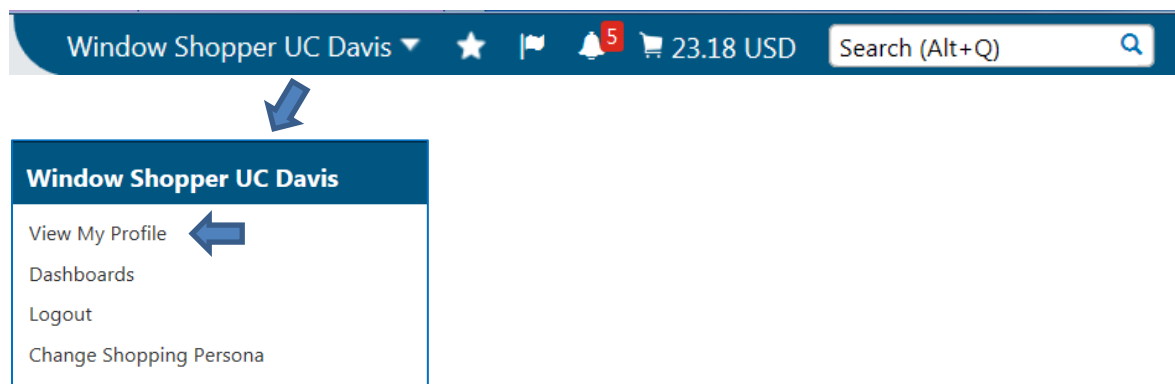
Changes to directory listings generally require approval from your department business office, which will be automatically notified once you submit the update request.

After your updated record is approved in the campus directory, the information in AggieBuy will reflect the updated information the next business day.

## What Can I Add?

Aside from your personal information, you can add shipping address favorites and a default, and account favorites and a default, if you'd like. This will save you time when completing a Requisition.

To access your profile, click on your username in the banner at the top of the page and choose "View My Profile."



Once in your profile, use the links on the left to access the following functions.

## User Profile and Preferences


### Default User Settings

**Custom Field and Accounting Code Defaults:** This is a good place to enter the account(s) you use on a regular basis. Although not required, this information can help expedite the check-out process and can be overridden as necessary on individual orders.


Here's how to set these up:

1. Select the **Code Favorites** tab
2. Click the **Add** button in the top section of the screen. A **Chart of Accounts** window will open.

### Custom Field and Accounting Code Defaults

Header (int.) | Header (ext.) | Supplier | Codes | **Code Favorites** 

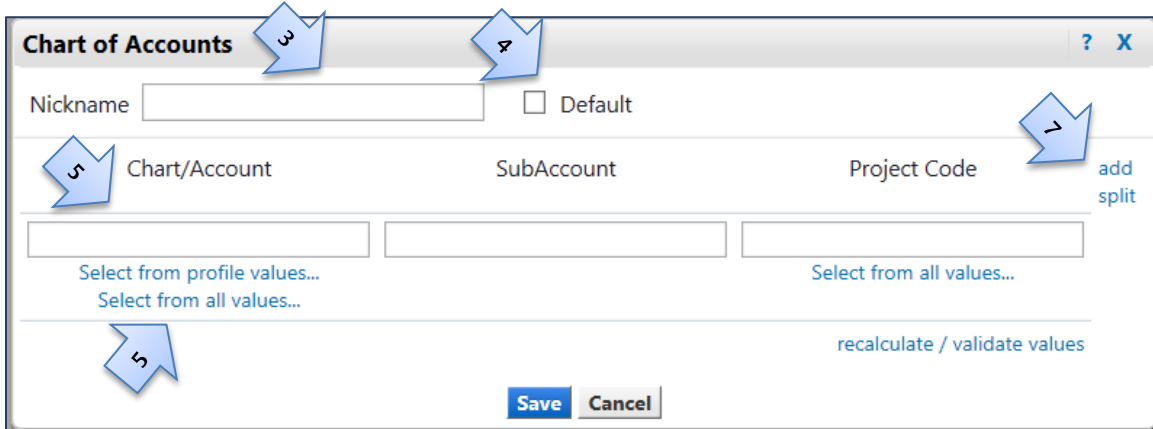
Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

**Add** 

#### Chart of Accounts

**test default** (default) Edit Delete

Chart/Account	SubAccount	Project Code
3-0019900 ENGR: DEAN'S OFFICE GENERAL FUNDS	<i>no value</i>	<i>no value</i>



3. Enter a **Nickname** for the account. This could be something that makes it easy to identify what the account is for, like "Professor Jones Account."
4. Check the **Default** box if you want this to be the default when you place orders in AggieBuy.
5. If you already know the account you want to use, enter it as **Chart of Account** hyphen **Account number**, such as 3-6620001. If you don't know the account, click on **Select from all values** below the **Chart/Account** field to search for a valid account to return to the field.
6. Repeat the process, if desired, for the **SubAccount** and **Project Code** fields.
7. If split accounts are desired for your default, click on the **add split** link to add another line and repeat the process again. Make sure you indicate the % of price or % of quantity for split accounts.
8. Click the **Save** button. Any carts created **after** the information is saved will reflect this updated information. Any carts that were started prior to the update will NOT reflect the updated information.

NOTE: Keep in mind that you can always change the default attributes used on a specific Requisition. Setting a default can be helpful if you routinely use the same accounts on your AggieBuy requisitions.

**Default Addresses:** Set up frequently used shipping addresses here and choose a default. Your default address will be automatically entered in any requisitions you create. Any other addresses you set up in your profile will be included in a drop-down menu for overriding your default shipping address. You'll also have the option to choose any address set up in AggieBuy.

### Default Addresses


?


Select an address to edit

Shipping Addresses	Edit Selected Address
1 BEE BIOLOGY RD	Nickname <input type="text" value="2400 HUTCHISON DR"/> <input type="button" value="x"/>
1000 OLD DAVIS RD	Default <input type="checkbox"/> <span style="margin-left: 20px;">←</span>
1004 E HOLTON RD	Current Default Address 260 COUSTEAU PL
<b>260 COUSTEAU PL</b>	<b>A D D R E S S</b>
8279 SCOTT FORBES RD	Attn: Requester UC Davis
BRIGGS HALL	Room/Ste/Floor
	Dept. ACCOUNTING & FINANCIAL SERVICE
	Address Line 1 2400 HUTCHISON DR
	City DAVIS
	State CA
	Zip Code 95616-5270
	Country United States
	<input type="button" value="Save"/>

**Cart Assignees:** Add users who will most frequently be your choice when assigning a shopping cart. You can choose a default by clicking “Set as Preferred.” When you choose to assign a shopping cart, a list of the users you’ve set up in your profile will appear, with your preferred assignee at the top of the list. You’ll also have the option to choose an assignee other than those in your profile.

**Cart Assignees**

[Add Assignee...](#) 

Name	Action
<b>CHRISTINA JONES (Preferred Assignee)</b>	<a href="#">Remove Preferred</a> <a href="#">Remove</a>
Kirby Smith 	<a href="#">Set as Preferred</a> <a href="#">Remove</a>

**Financial Approver:** This section is only for use by Procurement and Contracting Services.

## User Roles and Access, Ordering and Approval Settings, and Permission Settings

These designations are set up in the AggieBuy Roles application by your department administrator and no editing is available.

## Notification Preferences

Use these sections to choose what kind of notification (if any) you'd like to receive when each of these events occurs. By clicking on "Override" you can choose from an email, a notification that's accessed by clicking on "Notifications" in the banner at the top of the screen, both of these, or no notification. Each type of event has a default that will be in effect until you choose to override it.

**Notification Preferences: Shopping, Carts & Requisitions** [Edit Section](#) ?

The in-application notifications are not yet available for all Email Notifications. ?

Prepared By - Cart Assigned Notice ?	None
Prepared By - PR line item(s) rejected ?	Email & Notification
Prepared By - PR rejected/returned ?	Email & Notification
Cart Assigned Notice ?	Email & Notification
Receive PR and PO notifications for Carts Assigned to Me ?	None

**Notification Preferences: Shopping, Carts & Requisitions** ?

The in-application notifications are not yet available for all Email Notifications. ?

Prepared By - Cart Assigned Notice ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Prepared By - PR line item(s) rejected ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Prepared By - PR rejected/returned ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Cart Assigned Notice ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Receive PR and PO notifications for Carts Assigned to Me ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	None

**Notification Preferences: Shopping, Carts & Requisitions**

The in-application notifications are not yet available for all Email Notifications.

Prepared By - Cart Assigned Notice ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Prepared By - PR line item(s) rejected ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	None Email Notification Email & Notification
Prepared By - PR rejected/returned ?	<input type="radio"/> Default <input checked="" type="radio"/> Override	
Cart Assigned Notice ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Receive PR and PO notifications for Carts Assigned to Me ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	None

## User History

**View User's History:** This section provides a list of all the changes you've made to your profile. Use the "Click to filter history" function at the top of the window to filter the list, or export the list to an Excel spreadsheet by clicking "Export CSV" above the list on the right.

### View User's History

[Click to filter history ?](#)
[Export CSV](#)

Results Per Page 20 ▼ **Records Found: 281** ◀ Page 1 ▼ of 15 ▶ ?

Date ▼	User ▲	Action ▲	Section ▲	Selection ▲	Field ▲	Old Value	New Value
4/19/2016 2:18 PM	Requester UC Davis	User address created	Addresses : Ship To			<i>empty</i>	8279 SCOTT FORBES RD
4/19/2016 11:30 AM	Requester UC Davis	Modified	User Settings : Notification Preferences	Supplier Administration	Supplier Registration Duplicate Found	None <i>(inherited)</i>	None
4/19/2016 11:30 AM	Requester UC Davis	Modified	User Settings : Notification	Sourcing Event - Evaluation	Sourcing Event - Evaluation Workflow	None <i>(inherited)</i>	None

### View User's History

**Filters** ?

Start Date  📅  
mm/dd/yyyy

End Date  📅  
mm/dd/yyyy

Action  ▼

Section  ▼

[Apply](#)

**Add Profile Comment:** You can add a comment to any section of your profile history here.