



## CU Marketplace Tip: How do I create a default ChartString for my Requisitions?

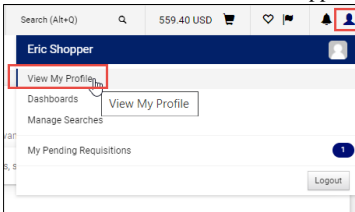
### What is it?

When on the checkout screen for your CU Marketplace Cart, Requesters must ensure the Accounting Code (ChartString) information is complete and correct before submitting as a Requisition for approval. Shoppers have the option to enter this information but are not required to do so. Refer to the [How Do I Enter a ChartString in My Requisition?](#) tip for guidance.

You can create default values for ChartFields in your Profile and those values will automatically be populated in your Requisitions. Sources for information related to your default ChartField values include your Department Administrator, ARC Requester Defaults Page or your P-Card profile (if applicable). Refer to the [Modifying Profile Settings in the CU Marketplace job aid](#) for more details.

### Setting an Accounting Code (ChartString) Favorite and Default

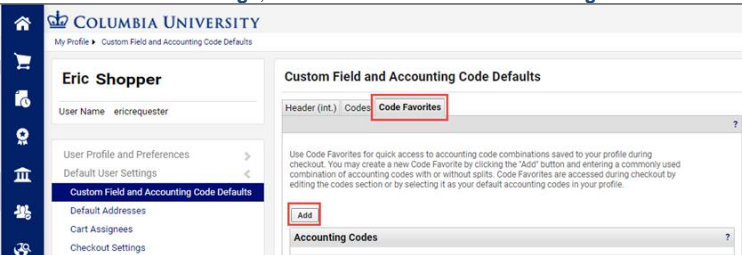
1. Click the **Profile** icon in the upper right corner of the CU Marketplace screen.



2. Click **View My Profile**.
3. Click **Default User Settings**.



4. Under **Default User Settings**, click **Custom Field and Accounting Code Defaults**.



5. Click the **Code Favorites** tab.
6. Click the **Add** button. The Accounting Codes window appears.

**Commented [KS1]:** Minor point, but the screenshot above is for "Eric Shopper" and this screenshot is for "Eric Requirer" – wondering if that might be confusing for users?

7. Enter a **Nickname** for the ChartString so that you can easily access the Code Favorite when creating your Requisitions. You can click the *Default* checkbox to indicate that this will be your default ChartString.
8. Enter the ChartField values. They must be entered in order left to right as the available values are dependent on the value in the previous field. You can leave ChartFields blank when entering your Code Favorites but you must complete any blank ChartFields when submitting your Requisitions. You can click the **Select from all values** link to use the Custom Field Search for the field you are populating.

9. Click the **Save** button. You can click Add again to enter additional ChartString favorites.

### Where do I get help?

Please contact the Finance Service Center

<http://finance.columbia.edu/content/finance-service-center>

You can log an incident or request a service via Service Now

<https://columbia.service-now.com>