

CSUBUY Reference Guide: How to Set Default Addresses and Chartfield in Your Profile


This reference guide will walk you through the process of setting your default addresses and chartfield in your profile.

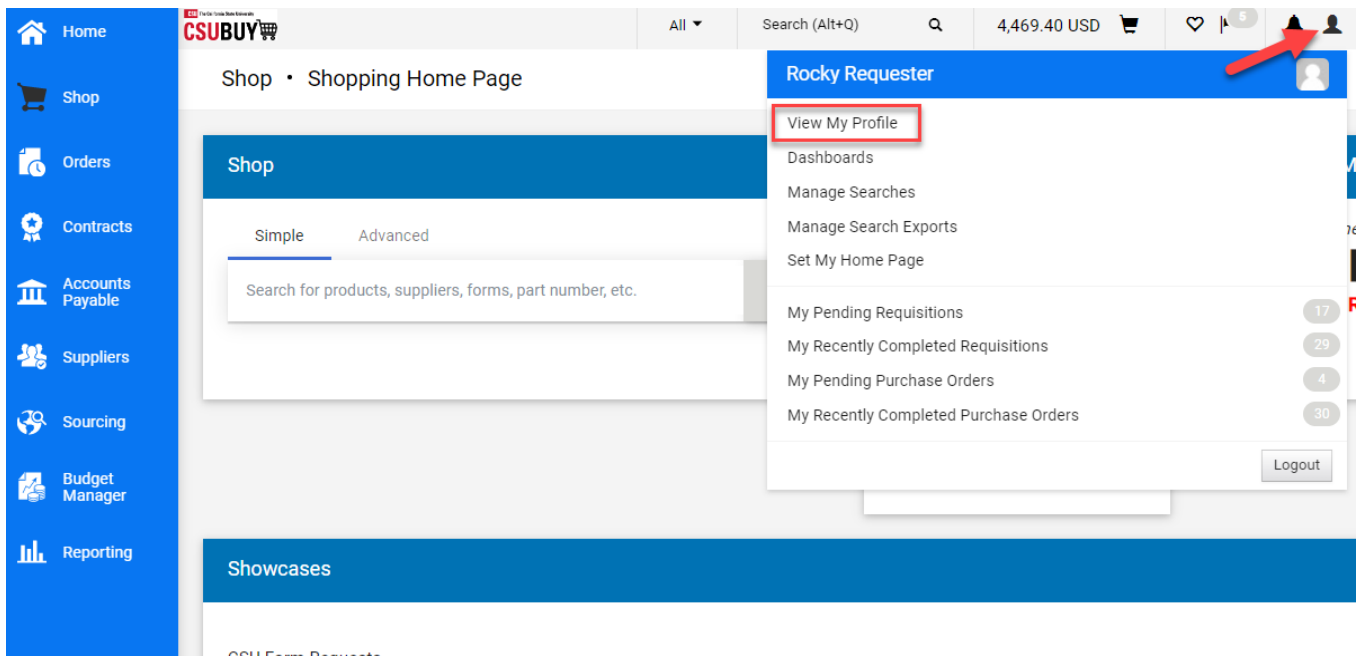
Note: the screenshots will look different than production; however, the direction and icons included are the same.

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Access Your User Profile

1. Log into CSUBUY (<https://csubuy.calstate.edu>) using your SSO Log-in.
2. In the **CSUBUY Shopping Home Page**, navigate to the top right corner and click **User Profile** icon (). Click on the **User Profile** icon and select **View My Profile**. It will route to your profile details.



The screenshot shows the CSUBUY user profile page. The left-hand navigation menu includes Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Sourcing, Budget Manager, and Reporting. The main content area is titled 'Rocky Requester' and shows the user's name as 'rrequester'. The 'User's Name, Phone Number, Email, etc.' section is active, displaying the following information:

- First Name: Rocky
- Last Name: Requester
- Phone Number: [input field] ext. [input field]
- Mobile Phone Number: [input field]
- E-mail Address: nobody@jaggaer.com
- Business Unit: 1_CSU Chico Cal State Univ P2P (CHXCO)
- Department: -
- Position: -
- Authentication Method: Local
- User Name: rrequester

A 'Save Changes' button is located at the bottom right of the settings section.

Navigating to Default Addresses

3. Navigate to your **Default Addresses** from the left-hand navigation. Click on **Default User Settings > Default Addresses**. You will land on the screen to update your default addresses.

The screenshot shows the CSUBUY user profile page with the 'Default Addresses' section active. The left-hand navigation menu is the same as in the previous screenshot. The main content area is titled 'Rocky Requester' and shows the user's name as 'rrequester'. The 'Default Addresses' section is active, displaying the following information:

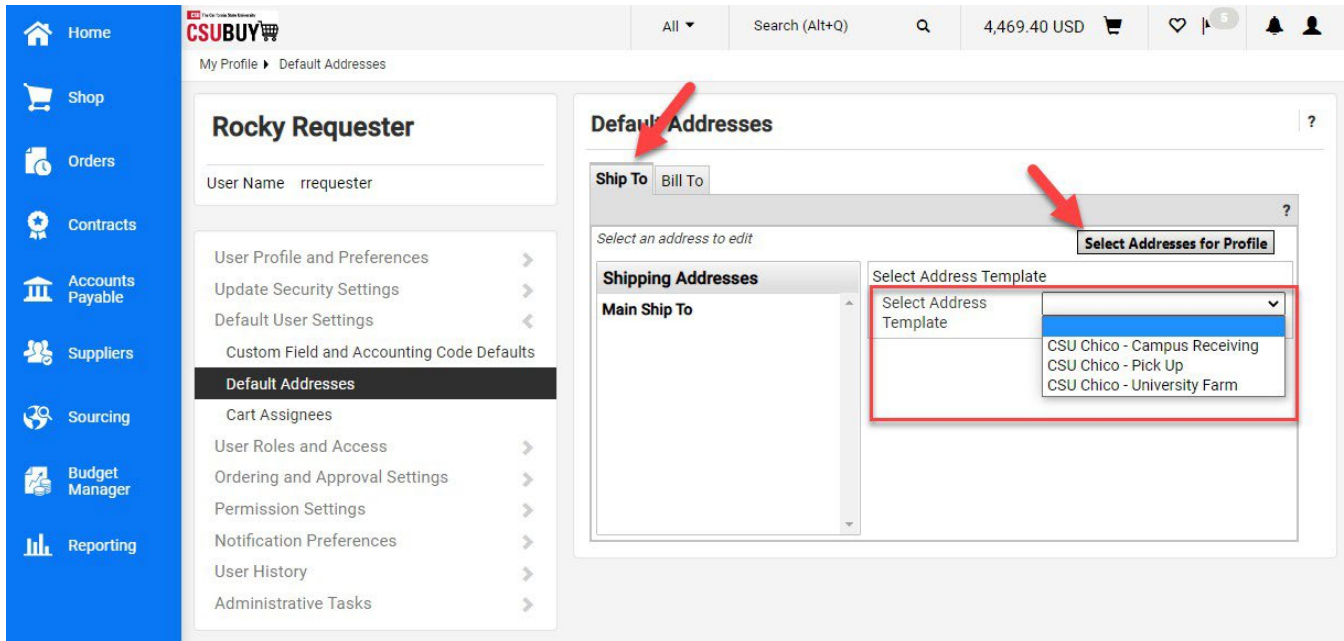
- Ship To: [input field]
- Bill To: [input field]
- Select an address to edit: [input field]
- Select Addresses for Profile: [input field]
- Shipping Addresses: [input field]
- Main Ship To: [input field]

The 'Default User Settings' and 'Default Addresses' menu items in the left-hand navigation are highlighted with red boxes.

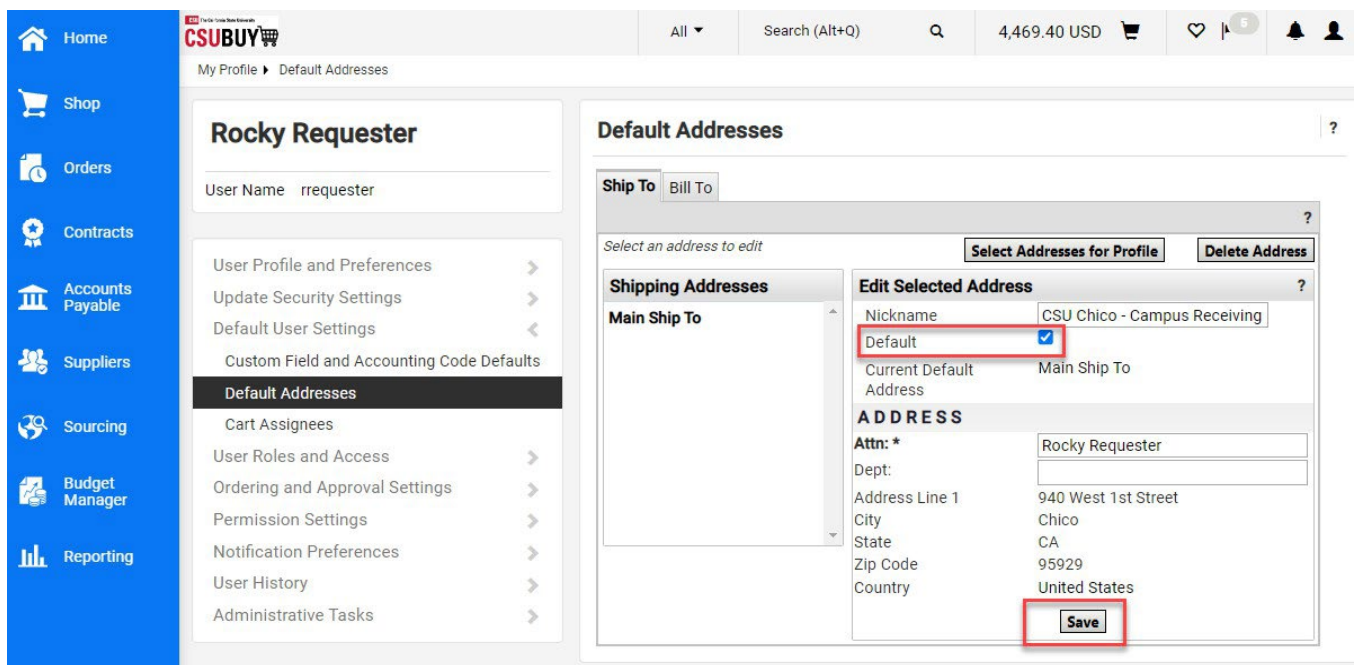
Setting Default Addresses

Setting Default ShipTo

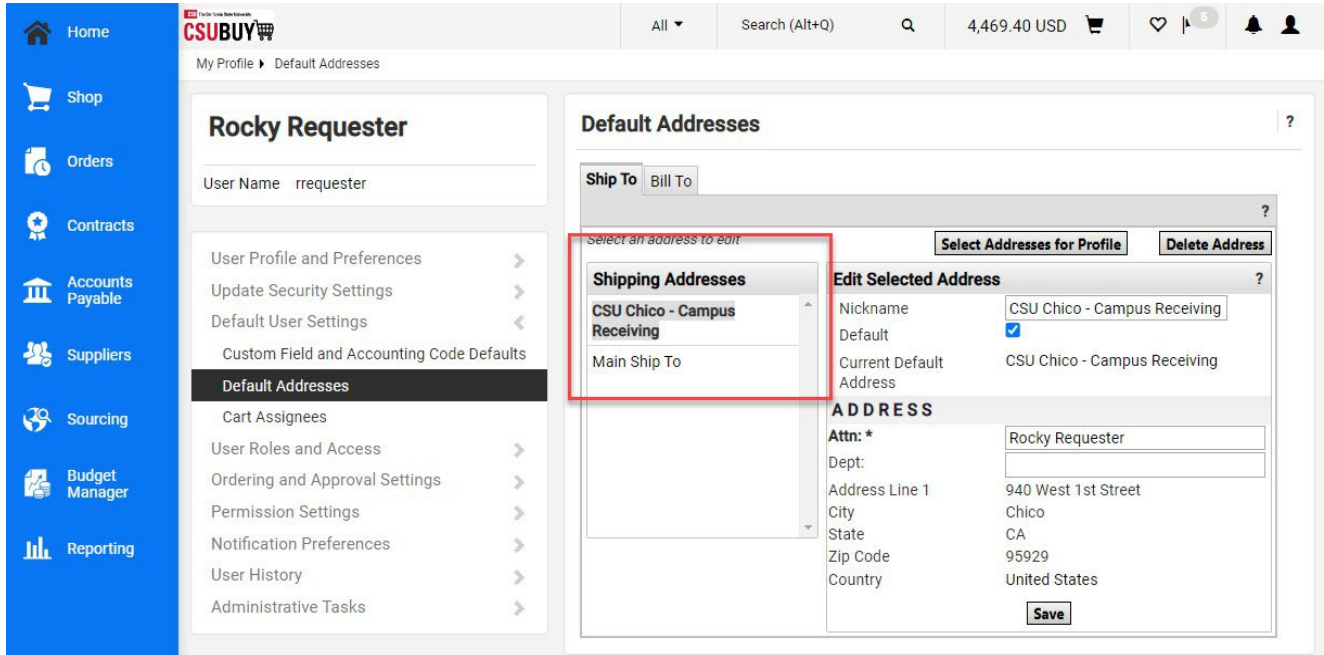
- After accessing the **Default Addresses**, you should be able to access the **Ship To** tab to update your default **Ship To** Address. If not, click on the **Ship To** tab.
- Click on **Select Addresses for Profile** and then select the **Select Address Template** that you would like to use.



- The details of your selection will appear. Confirm that the address is the one you would like to set as a default. If so, click on the **Default** checkbox and click **Save** to set your default **Ship To** address. You can also make edit the **Nickname**, the **Attn:**, and the **Dept** fields within the address. **Note:** asterisk fields are require fields before saving.

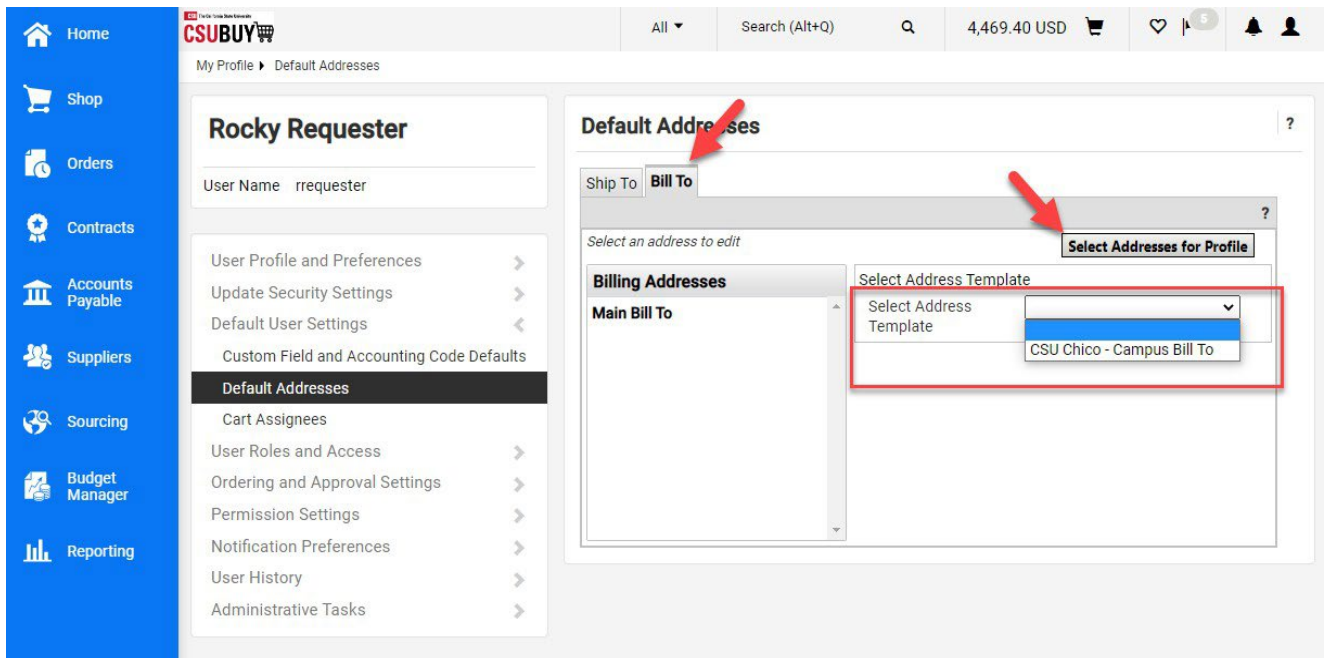


7. To confirm that the address saved, it will appear in the **Shipping Addresses** section of **Default Addresses**.

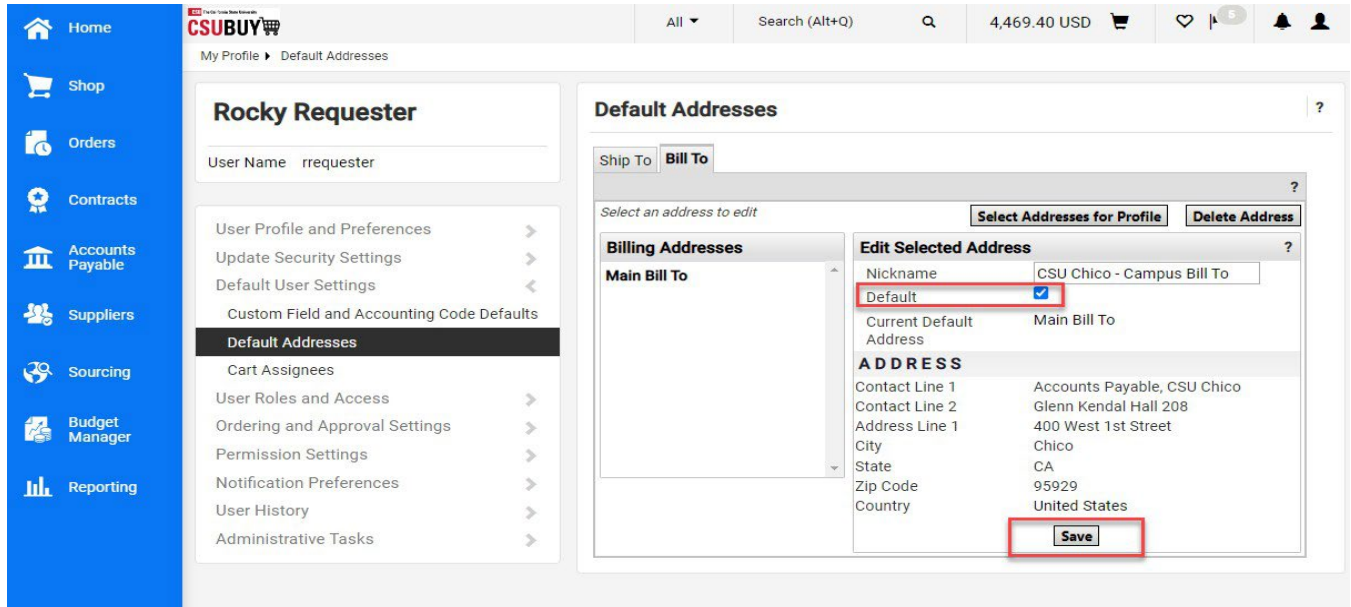


Setting Default BillTo

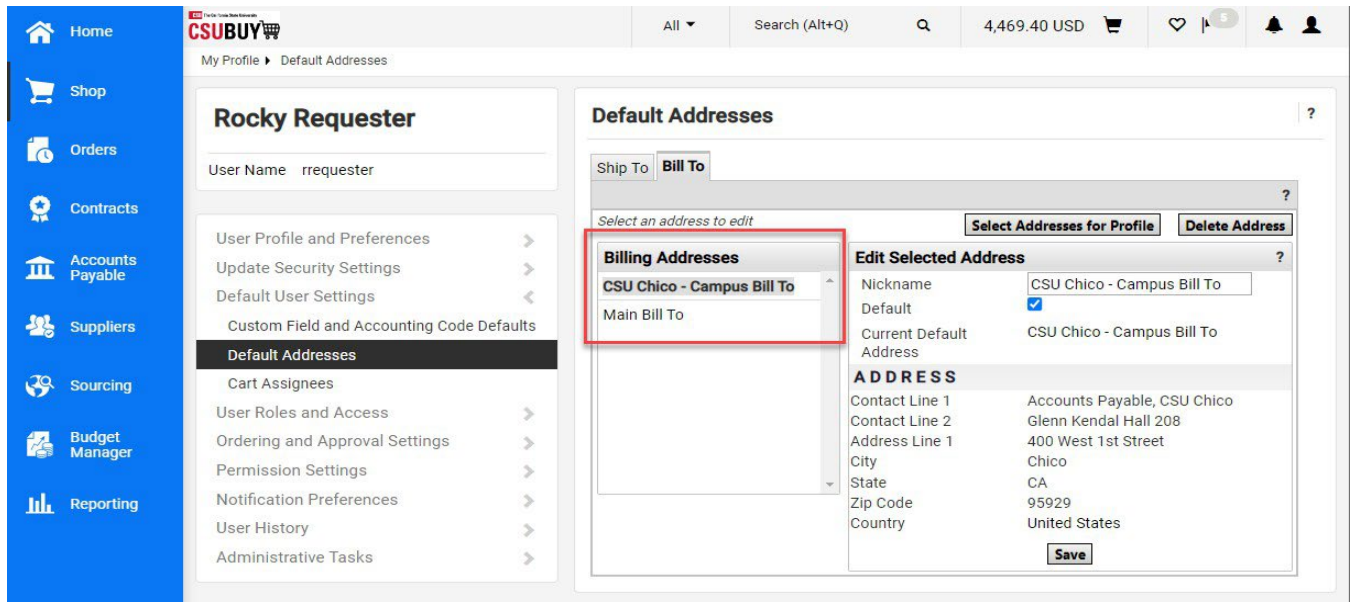
8. Navigate to the **Bill To** address by click on the **Bill To** tab of the **Default Addresses** screen. Click on **Select Addresses for Profile** and then select the **Select Address Template** that you would like to use.



9. The details of your selection will appear. Confirm that the address is the one you would like to set as a default. If so, click on the **Default checkbox** and click **Save** to set your default **Ship To** address. You can also make edit the **Nickname**, the **Attn.**, and the **Dept** fields within the address. **Note:** asterisk fields are require fields before saving.



10. To confirm that the address saved, it will appear in the **Billing Addresses** section of **Default Addresses**.



Navigating to Default Chartfield

11. Navigate to your **Custom Field and Accounting Code Defaults** from the left-hand navigation. Click on **Default User Settings > Custom Field and Accounting Code Defaults**. You will land on the screen to update your default addresses.

My Profile > Custom Field and Accounting Code Defaults

User Name [REDACTED]

- User Profile and Preferences >
- Default User Settings <
- Custom Field and Accounting Code Defaults**
- Default Addresses
- Cart Assignees
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

Custom Field and Accounting Code Defaults

Header (int.) Codes Code Favorites Internal Information Cart

Custom Field Name	Default Value	Description	Edit Values
Buyer	No Default Value		Edit
Deliver To Location	PODEPT_SMCMP	PO Department	Edit
Invoice Reviewed By	No Default Value		Edit
Invoice Received (mm/dd/yyyy)	No Default Value		Edit
Multi-Year PO	No Default Value		Edit
Tax Code	No Default Value		Edit
Payment Method Override	No Default Value		Edit
Payment Handling Override	No Default Value		Edit
Pay Group Override	No Default Value		Edit
Cancellation Date	No Default Value		Edit
Feedback Date	No Default Value		Edit

Setting Default Chartfield

- After accessing the **Custom Field and Accounting Code Defaults**, you should be able to access the **Code Favorites** tab to update your default chartfield. Click on the **Code Favorites** tab.
- The details of your selection will appear. Select the Business Unit that you would like to set as a default. To set your default chartfield, click **Add**.

My Profile > Custom Field and Accounting Code Defaults

User Name [REDACTED]

- User Profile and Preferences >
- Default User Settings <
- Custom Field and Accounting Code Defaults**
- Default Addresses
- Cart Assignees
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

Custom Field and Accounting Code Defaults

Header (int.) Codes **Code Favorites** Internal Information Cart

Business Units: Cal State San Marcos P2P (SMXMP)

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

Chartfield

Business Unit	Fund	DeptID	Account	Account Override	Program	Class	Project
no value	no value	no value	no value	no value	no value	no value	no value

- Enter a **Nickname**. Check the **Default** box. Enter your chartfield codes into the appropriate fields. Note: the Account code will auto populate on your requisition(s) based on the Commodity Code(s) of your purchase. When creating a requisition, you can use the Account Override if you need to use another Account Code. Click **Save**.

Chartfield

Nickname Default

Business Unit	Fund	DeptID	Account	Account Override	Program	Class	Project
SMCMP <small>Select from profile values...</small>	<input type="text"/> <small>Select from all values...</small>	<input type="text"/> <small>Select from profile values... Select from all values...</small>	no value	<input type="text"/> <small>Select from all values...</small>	<input type="text"/> <small>Select from all values...</small>	<input type="text"/> <small>Select from all values...</small>	<input type="text"/> <small>Select from all values...</small>

15. To confirm that the chartfield saved, it will appear in the **Chartfield** section of **Custom Field and Accounting Code Defaults**.

The screenshot shows the CSUBUY user interface. The left sidebar contains navigation options, with 'Custom Field and Accounting Code Defaults' selected. The main content area is titled 'Custom Field and Accounting Code Defaults' and includes tabs for 'Header (int.)', 'Codes', 'Code Favorites', 'Internal Information', and 'Cart'. Under 'Code Favorites', there is an 'Add' button and a 'Chartfield' entry. The 'Chartfield' entry is highlighted with a red box and contains the following information:

Chartfield ?

Whatever Nickname You Want (default)

Business Unit	Fund	DeptID	Account	Account Override	Program	Class	Project
SMCMP Cal State San Marcos	48500_SMCMP TF Campus Operating Fund	1047_SMCMP FAS Procurement & Contracts	no value	no value	no value	no value	no value

CSUBUY Support

For additional support on Setting Default Addresses and/or other questions, submit a ticket through [ServiceNow](#).