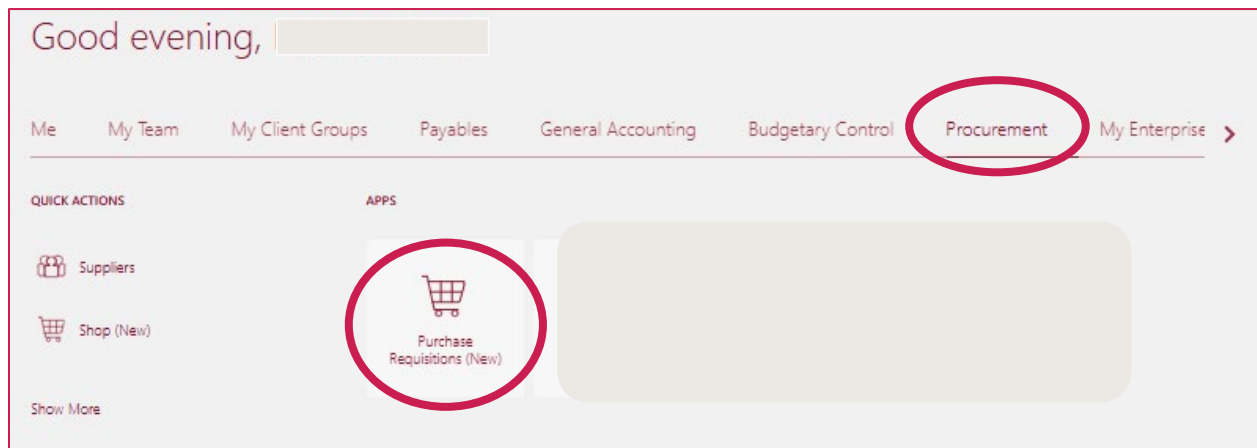
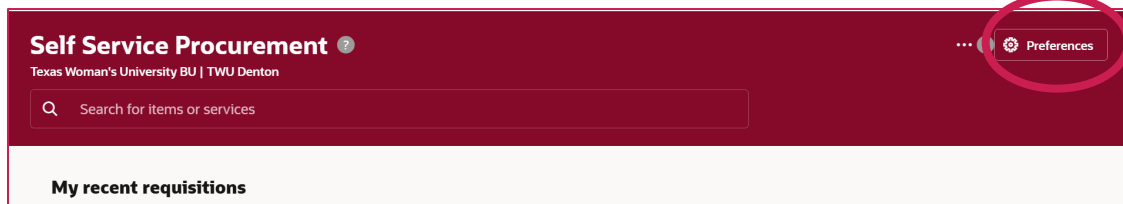


# How to Update Requisition Preferences

1. Navigate to **Procurement > Purchase Requisitions (New)**

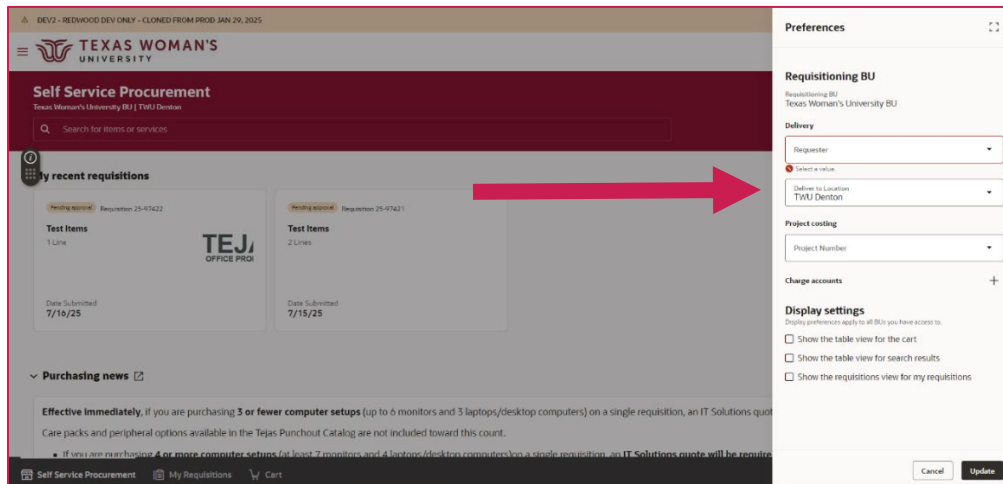


2. Click **Preferences** at the top right of the page.



3. The Preferences panel will appear on the right side of the screen.

*Please note that the Requisitioning BU (Business Unit) cannot be changed. At this time, all TWU campuses fall under one business unit.*



## Confirm Requester

4. Confirm that your name is listed as the requester.

Delivery

Requester

Minerva Sample

▼

Enter at least 3 characters.



## Confirm Deliver to Location

5. The Deliver to Location **must be** one of the following:
- Central Receiving – Denton
  - Central Receiving – Dallas
  - Central Receiving – Houston

Type “Central Receiving” in the dropdown menu to access these options.

Deliver to Location

Central Receiving -

▼

**Central Receiving - Denton**

Central Receiving - Denton

1200 Frame St, Denton, TX 76209, Denton, United States

**Central Receiving - Dallas**

Central Receiving - Dallas

5500 Southwestern Medical Ave, Dallas, TX 75235, Dallas, United States

**Central Receiving - Houston**

Central Receiving - Houston

6700 Fannin St, Houston, TX 77030, Harris, United States

## Add Department Charge Account(s) / Chart String(s)

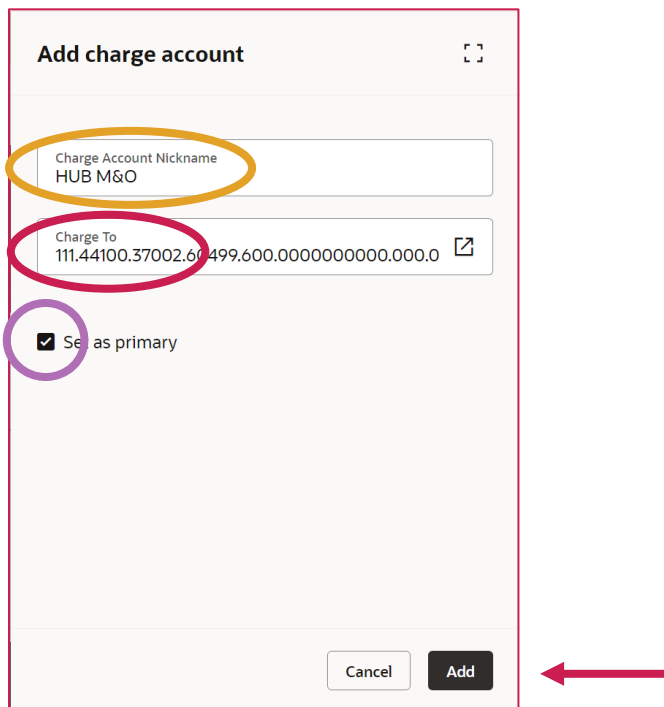
### 6. Open the Add Charge Account Window

- Click the plus icon next to Charge accounts.



### 7. If you know your Charge Account Number

- If you have your Charge Account Number handy, enter it into the **Charge To** field and add a **Nickname** above it.
- You can choose to set this Charge Account as your primary account by checking the box labeled **Set as Primary**.
- Click **Add**.
- Proceed to Step 12.

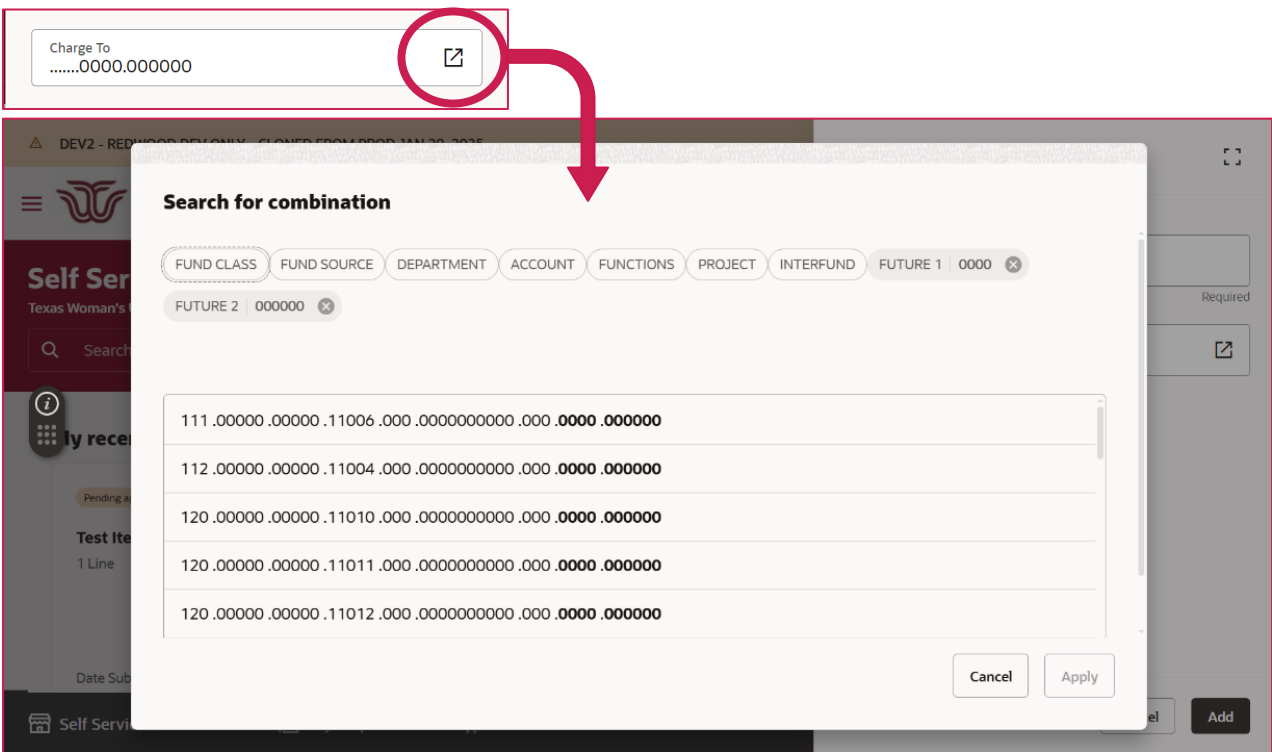
A screenshot of a form titled "Add charge account". The form contains three main input fields: "Charge Account Nickname" with the value "HUB M&O", "Charge To" with a long alphanumeric string, and a checkbox labeled "Set as primary" which is checked. The "Charge To" field has a small icon to its right. At the bottom of the form are two buttons: "Cancel" and "Add". The "Add" button is highlighted with a red circle, and a red arrow points to it from the right. The "Charge Account Nickname" field is circled in orange, and the "Charge To" field is circled in red.

If you do not have your Charge Account Number handy, proceed to Step 8.

## Finding Your Charge Account Number (Chart String)

### 8. Open the Search Window

- Click this icon  in the **Charge To** field to open the Search window.



Charge To  
.....0000.000000

**Search for combination**

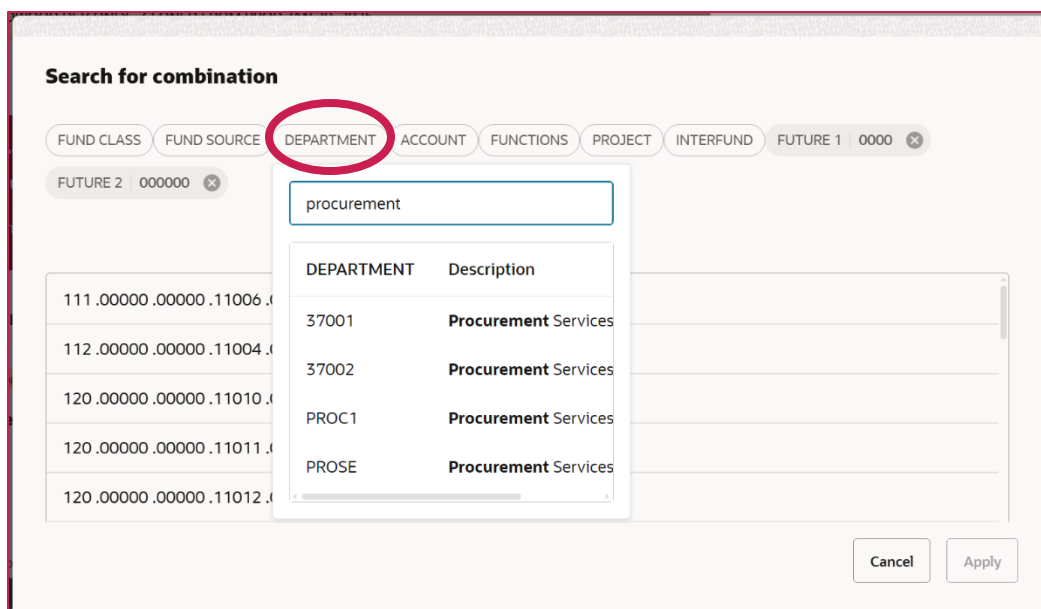
FUND CLASS FUND SOURCE DEPARTMENT ACCOUNT FUNCTIONS PROJECT INTERFUND FUTURE 1 0000 FUTURE 2 000000

|                                                              |
|--------------------------------------------------------------|
| 111 .00000 .00000 .11006 .000 .0000000000 .000 .0000 .000000 |
| 112 .00000 .00000 .11004 .000 .0000000000 .000 .0000 .000000 |
| 120 .00000 .00000 .11010 .000 .0000000000 .000 .0000 .000000 |
| 120 .00000 .00000 .11011 .000 .0000000000 .000 .0000 .000000 |
| 120 .00000 .00000 .11012 .000 .0000000000 .000 .0000 .000000 |

Cancel Apply

### 9. Narrow down your search by adding your department

- Click **DEPARTMENT** and begin typing in your department.
- Once it shows up as an option, select it.



**Search for combination**

FUND CLASS FUND SOURCE DEPARTMENT ACCOUNT FUNCTIONS PROJECT INTERFUND FUTURE 1 0000 FUTURE 2 000000

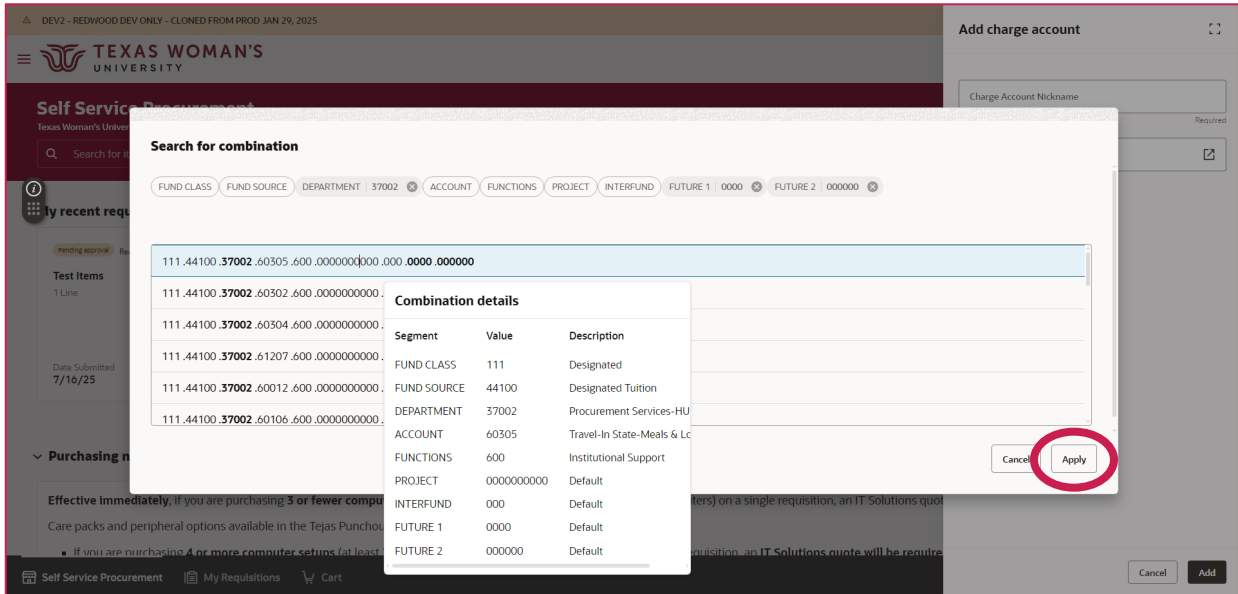
procurement

| DEPARTMENT | Description          |
|------------|----------------------|
| 37001      | Procurement Services |
| 37002      | Procurement Services |
| PROC1      | Procurement Services |
| PROSE      | Procurement Services |

Cancel Apply

### 10. Find the right Charge Account / Chart String

- Single-click or hover over each option to see their details.
- Once you've found the right one, click to make sure it's highlighted and click **Apply**.



## 11. Define it

- Add a **Nickname** for this Charge Account.
- You can choose to set this Charge Account as your primary account by checking the box labeled **Set as Primary**.

Add charge account

Charge Account Nickname  
HUB Travel Meals

Charge To  
111.44100.37002.60305.600.0000000000.000.0

☐ Set as primary

## 12. Review & Update

- You should see your added Charge Accounts listed now.

- Your Primary account should be marked with an label.
- If everything looks correct, click **Update**.

Charge accounts

HUB Travel Meals

111.44100.37002.60305.600.0000000000.000.0000.000000

...

HUB M&O

111.44100.37002.60499.600.0000000000.000.0000.000000

Primary ...

Display settings

Display preferences apply to all BUs you have access to.

☐ Show the table view for the cart

☐ Show the table view for search results

☐ Show the requisitions view for my requisitions

Cancel

Update