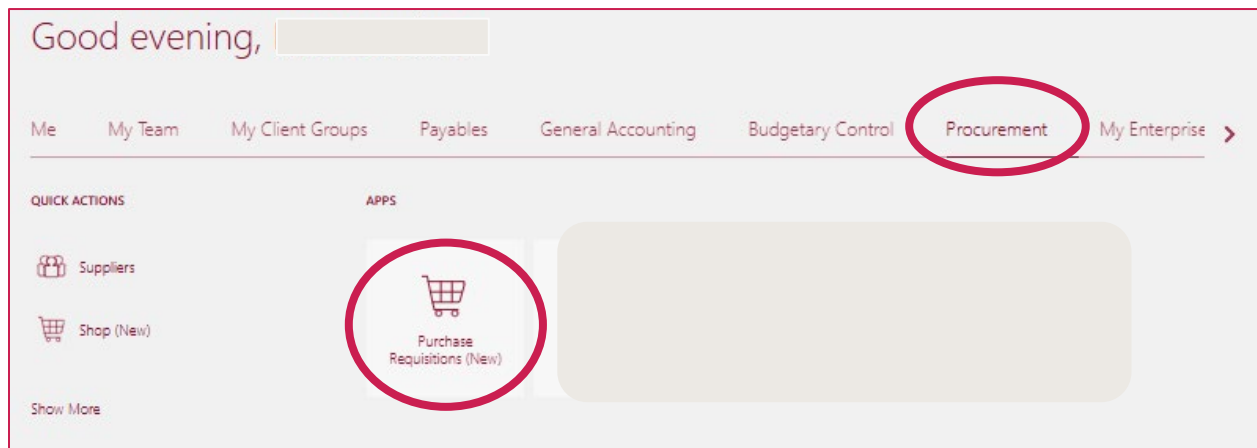
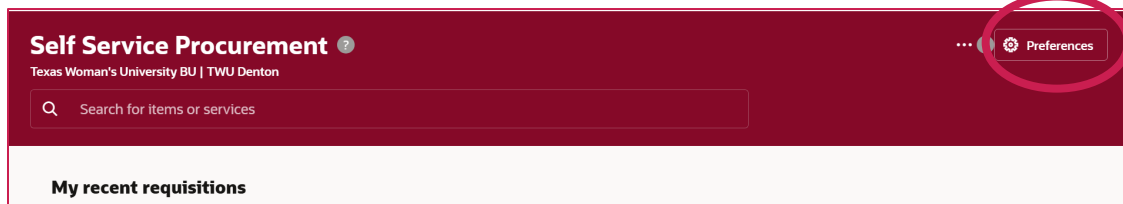


How to Update Requisition Preferences

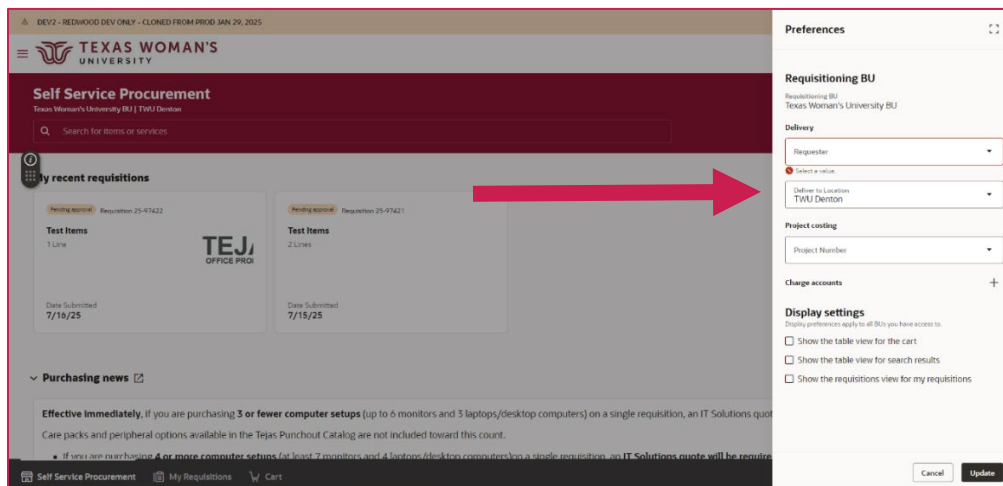
1. Navigate to **Procurement > Purchase Requisitions (New)**



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

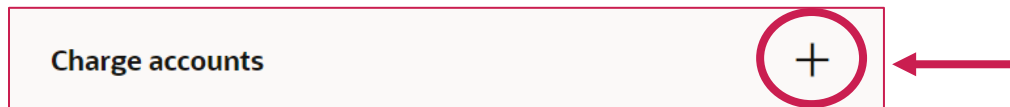
Central Receiving - Houston

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

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

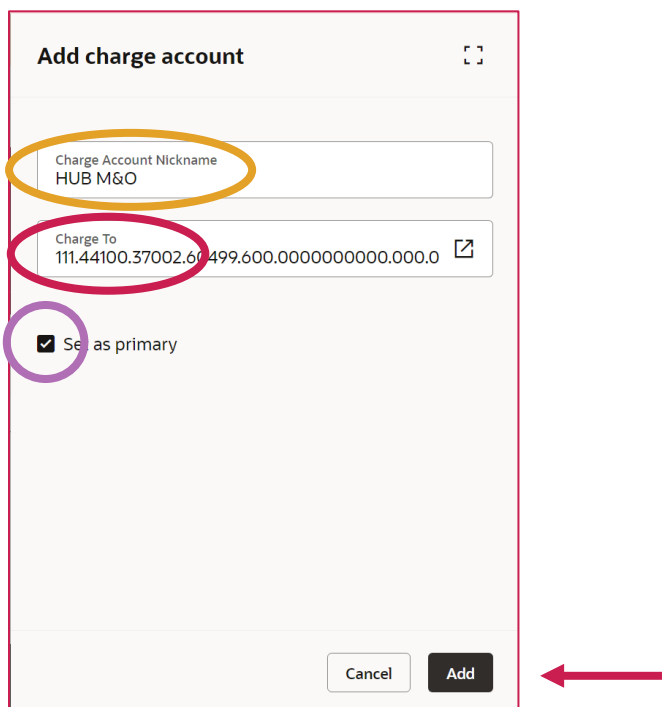
6. Open the Add Charge Account Window

- 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.

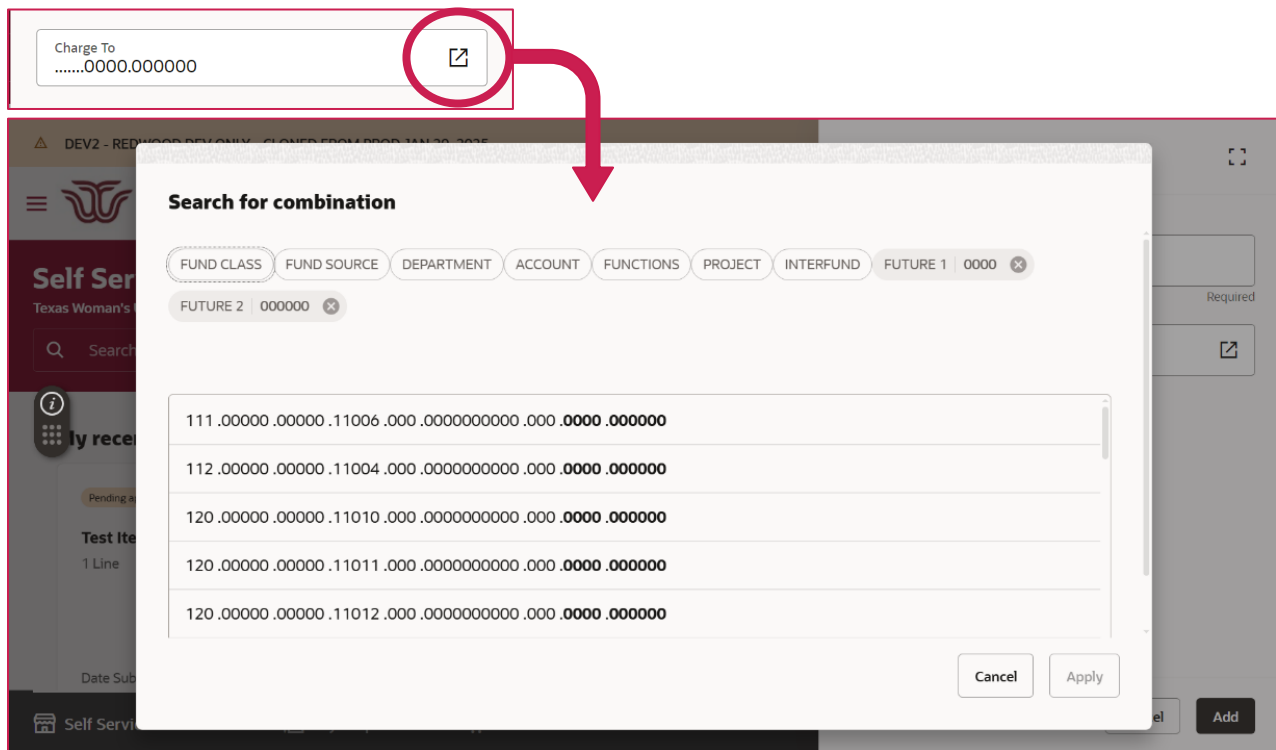


If you do not have your Charge Account Number handy, proceed to Step 8.

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

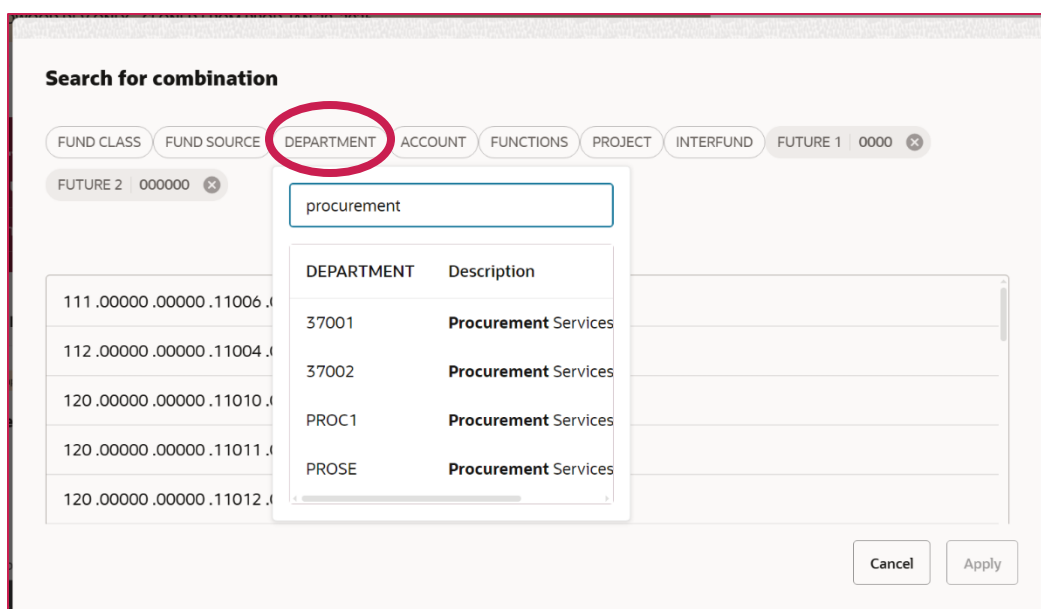
FUTURE 2 000000

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

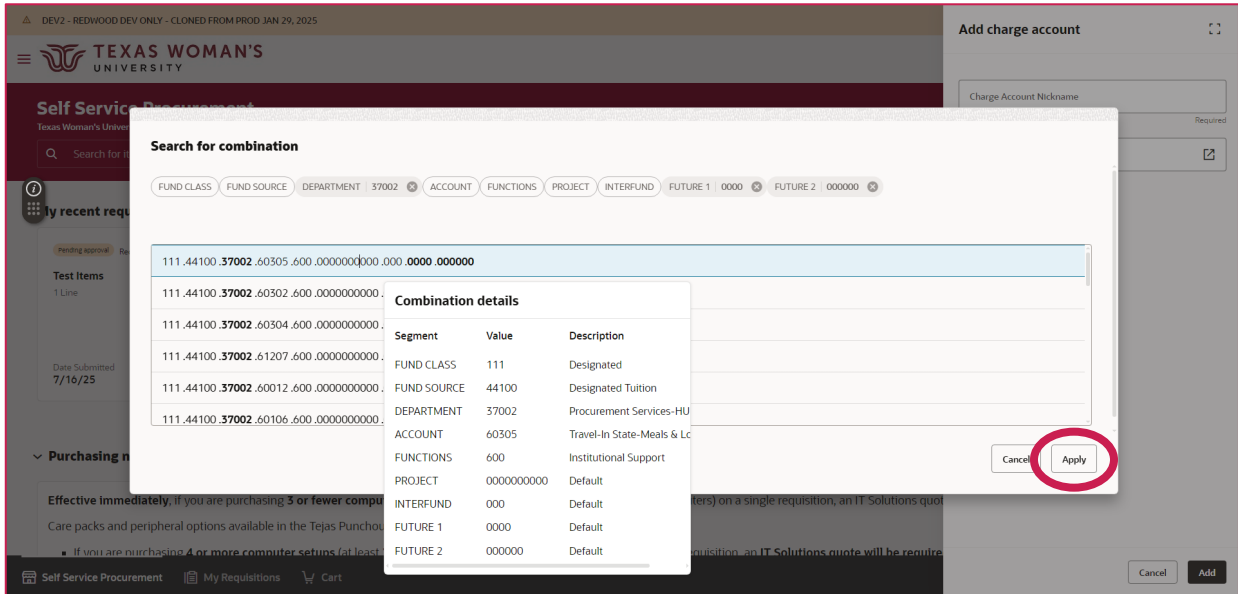
procurement

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**.

The screenshot shows the 'Add charge account' form. The 'Charge Account Nickname' field is highlighted with a yellow circle, and the 'Set as primary' checkbox is highlighted with a purple circle.

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