Job Aid: Setting Favorites – Accounting

Overview: This job aid demonstrates setting up Accounting Favorites in Spartan Marketplace. Establishing Favorites will help streamline the ordering process. User may set up multiple Accounting Strings with the ability to select and default to a specific one.

Setting up Accounting Favorites

1. From the Home Page, navigate to the Profile.
2. Under the Favorites section, click on the Accounting segment.
3. Enter all Accounting information including:
   - Account – Required field
   - Sub Account – Optional field. Need to enter Account first in order to populate this field.
   - Object – Required. Spartan Marketplace defaults to 6428 Supplies – Other
   - Sub Object – Optional field. Need to enter Object first in order to populate this field.
   - Project Code – Optional field
4. Use the Account Search (magnifying glass) to look up an Account Number. Spartan Marketplace will only display active Account Numbers for selection.

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5. Click on **Apply** once the desired Account Number is identified.

6. Click on **Add** once all desired Accounting String information has been entered.

5. The Accounting String is now saved as a Favorite.
6. The Accounting segment title displays a number that reflects the number of Accounting Strings saved as Favorites.
7. The Action buttons provide the following functionality:
   - Green Checkmark – allows user to set Accounting String as default Accounting for all orders placed in Spartan Marketplace
   - Red Subtract – allows user to remove saved Accounting String under Favorites
8. To add additional Accounting Strings under Favorites, start from Step 3 of this reference guide.

**Tip:** Note that orders can be tied to multiple accounts. Split accounting can be performed on the entire order or for a specific line item of an order.

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