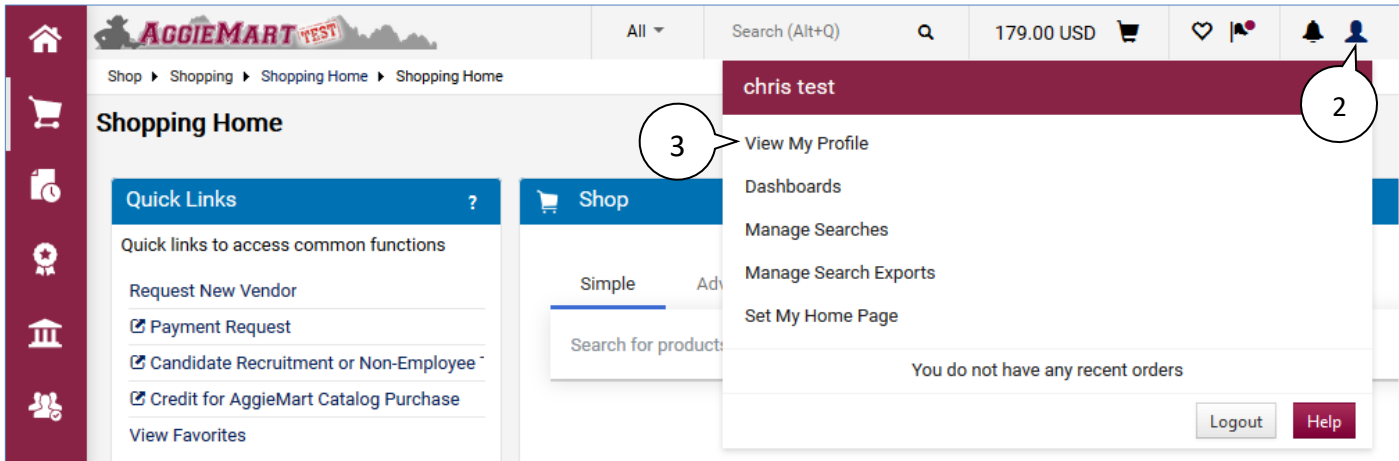


## User Profile Management

Profiles allow users to customize and default information, shipping addresses, frequently used indexes, cart assignees, notification preferences, and email approval options.

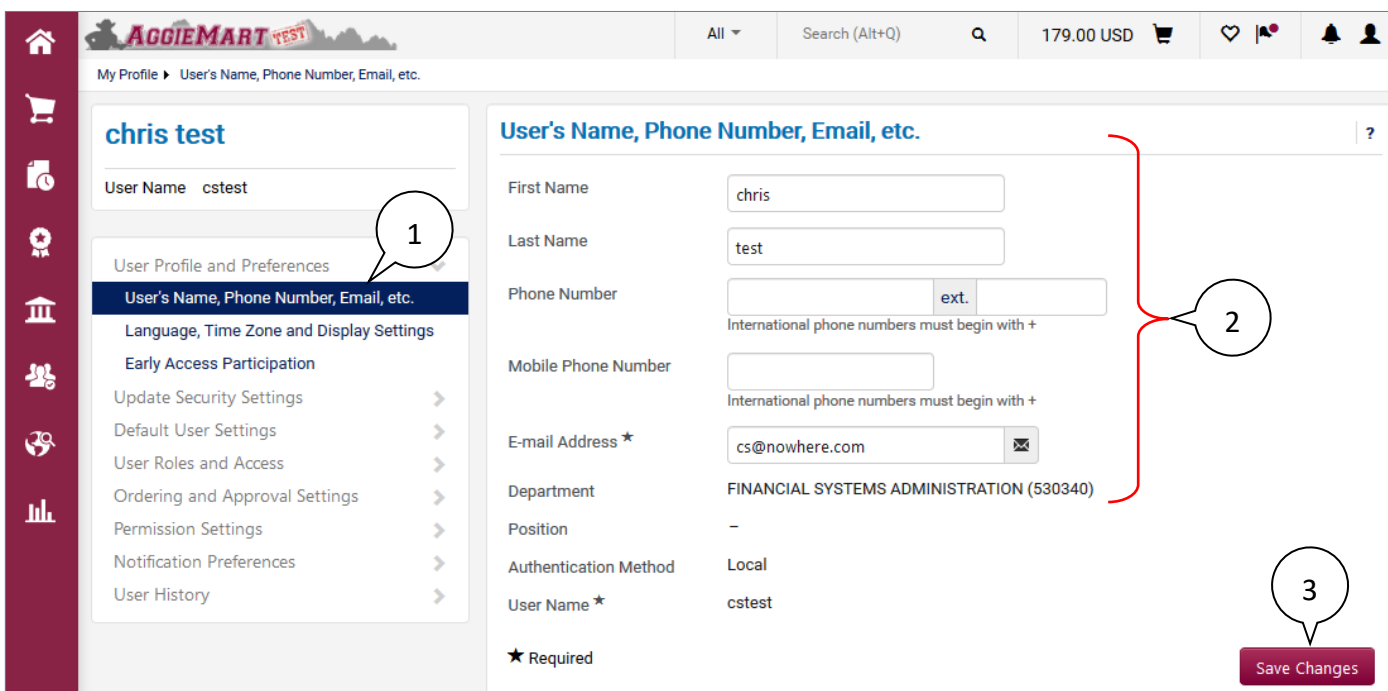
*Note: some of the values in your profile are maintained administratively and cannot be changed – these include user roles, permissions, order settings, and approval settings.*

1. Log in to myNMSU → Click on the **AggieMart** link  on the left side of the screen.



2. On the AggieMart home page → Click the **User** icon in the top right-hand corner of the screen.
3. Click on **View My Profile**.

## Setting Name, Phone Number, and Email



1. Click **User's Name, Phone Number, Email, etc.** on the left side panel.
2. You can update your **First Name, Last Name, Phone Number, and E-mail Address**.
3. Click **Save Changes**.

## Setting Default Index and Funding Source Codes

**Matt Crockett**  
User Name mattcroc

User Profile and Preferences >  
Update Security Settings >  
Default User Settings >  
**Custom Field and Funding Source Defaults**  
Default Addresses  
Cart Assignees  
Checkout Settings  
User Roles and Access >  
Ordering and Approval Settings >  
Permission Settings >  
Notification Preferences >  
User History >

**Custom Field and Funding Source Defaults** ?

Header (int.) Vendor Codes **Code Favorites** Internal Information ?

Custom Field Name	Default Value	Description	Edit Values
Special Approval	No Default Value		Edit
Federal Equipment Screening	No Default Value		Edit
Software Purchase	No Default Value		Edit
Sole Source	No Default Value		Edit
Open Order or Cost Declining	No Default Value		Edit
PO End Date	No Default Value		Edit
PO Start Date	No Default Value		Edit

1. Click on **Default User Settings**.
2. Click on **Custom Field and Funding Source Defaults**.
3. In the right pane → Click on the **Code Favorites** tab.

**Custom Field and Funding Source Defaults** ?

Header (int.) Vendor Codes **Code Favorites** Internal Information ?

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** 4

**Funding Source** ?

Chart	Index	Fund	Organization	Account	Program	Activity
no value	no value	no value	no value	no value	no value	no value

4. Click the **Add** button to enter a default index.

**Funding Source** ? X

Nickname   Default

Chart	Index	Fund	Organization	Account	Program	Activity	add split
N	<input type="text"/> <a href="#">Select from all values...</a>	no value	no value	738012 <a href="#">Select from profile values...</a> <a href="#">Select from all values...</a>	no value	no value	

5

Save Cancel

5. Click **Select from all values...** to search for the index.

**Custom Field Search** ?

Value

Description

7 **Search**

6

Close

6. Enter the index number in the **Value** box, or department in the **Description** box. Partial search terms are supported.

7. Click **Search**.

**Click to filter search results** ?

Results Per Page 20

**Values Found 1** Page 1 of 1 ?

Value	Description	
100783	FINANCIAL SYSTEMS ADMIN OPERATING	8 <a href="#">select</a>

8. Click the **Select** link (far right end of the row) for the index you want.

**Funding Source** ? X

Nickname   Default

Chart	Index	Fund	Organization	Account	Program	Activity	add split
N <small>Select from profile values... Select from all values...</small>	<input type="text" value="100783"/> <small>Select from all values...</small>	110006 <small>Select from all values...</small>	530340 <small>Select from all values...</small>	<input type="text" value="738012"/> <small>Select from profile values... Select from all values...</small>	1310	<i>no value</i>	

Save
Cancel

9. Enter a **Nickname**.
10. Click the **Default** checkbox if you want this index used as your default.
11. Click **Save**.

You will see the index you just added in the **Funding Source** list. **Code Favorites** can be used during checkout in the Funding section. Create additional Code Favorites by repeating these steps again.

**Custom Field and Funding Source Defaults** ?

Header (int.) Vendor Codes Code Favorites Internal Information

?

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

**Funding Source** ?

**Operating** (default) Edit Delete

Chart	Index	Fund	Organization	Account	Program	Activity
N	100783	110006	530340	738012	1310	<i>no value</i>
New Mexico State University	FINANCIAL SYSTEMS ADMIN OPERATING	OPERATING ACCOUNTS MAIN	FINANCIAL SYSTEMS ADMINISTRATION	MISC EPROCUREMENT	FISCAL OPERATIONS	

## Setting a Ship To Address

**Matt Crockett**  
User Name mattcro

User Profile and Preferences >  
Update Security Settings >  
Default User Settings >  
Custom Field and Funding Source Defaults  
**Default Addresses** 1  
Cart Assignees  
Checkout Settings

**Default Addresses** ?

No addresses defined in profile.

Ship To Bill To ?

Select an address to edit

No addresses defined in profile.

Shipping Addresses

2 Select Addresses for Profile

1. Under **Default User Settings** → Click **Default Addresses**.
2. In the right pane → Click **Select Addresses for Profile**.

Ship To Bill To ?

Select an address to edit

No addresses defined in profile.

Select Addresses for Profile

Shipping Addresses

Address Search

Nickname / Address Text 1620 3

Results Per Page 10

Search 4

Addresses Found: 3 Page 1 of 1

5

Name	Address
<input type="radio"/> Academic Research A	ATTN: Matt Crockett DEPT: FINANCIAL SYSTEMS ADMINISTRATION ROOM: Academic Research A 1620 Standley Dr Las Cruces, NM 88003 United States
<input type="radio"/> Academic Research B	ATTN: Matt Crockett DEPT: FINANCIAL SYSTEMS ADMINISTRATION

3. Enter a partial street address, building name in the **Nickname / Address Text** box.
4. Click **Search**. The search results will be displayed.
5. Click the **radio button** next to the correct address.

The **Edit Selected Address** section will be displayed.

6. Click the **Default** checkbox if this will be your default Ship To address.
7. Enter a **ROOM** number.
8. Click **Save**.

9. Under the **Bill To** tab, follow the same procedure to add a default billing address.  
**Note:** the only option is NMSU's **Accounts Payable** department address.