

Oracle Procurement Preferences – Section 1.0

This process is used to set your procurement preferences in Oracle:

- Shipping & Delivery
- Billing

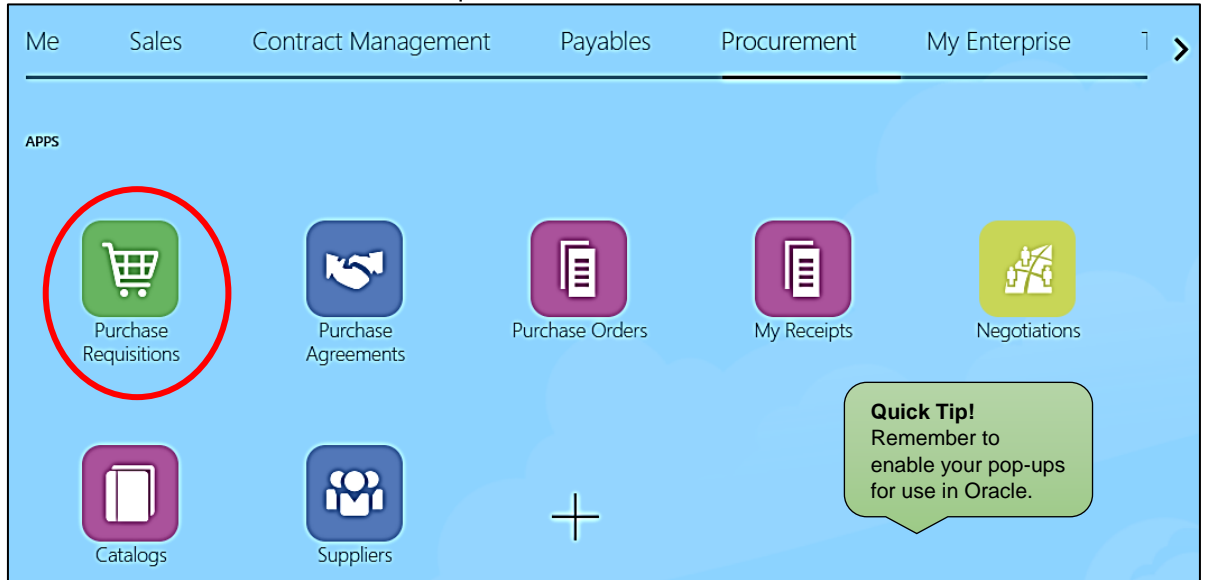
Audience: All

Additional Resources:

- Glossary
- Video (where applicable – insert link)
- Help Text (where applicable – insert link)
- GMHEC Website (where applicable – insert link)
- cheryl.foster@gmhec.org

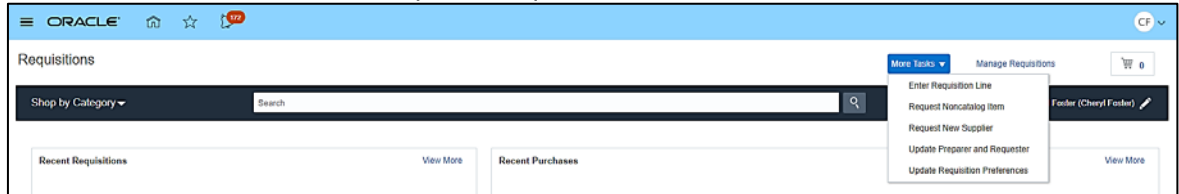
Navigation Path:

➤ Procurement → Purchase Requisition



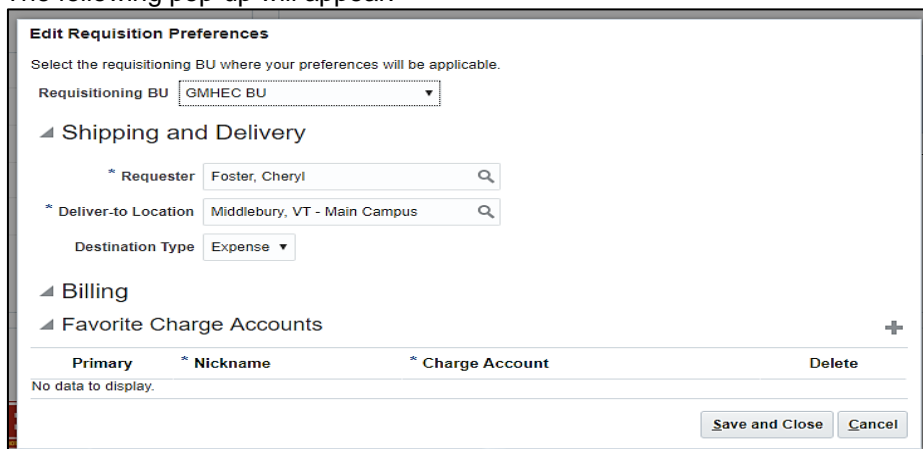
1.1 Set Your User Preferences

Go to “More Tasks” and choose “Update Requisition Preferences”



Choose Update Requisition Preferences from the “More Tasks” menu.

The following pop-up will appear:

A screenshot of the 'Edit Requisition Preferences' pop-up window. It shows the following fields and sections:

- Select the requisitioning BU where your preferences will be applicable.**
Requisitioning BU: GMHEC BU
- Shipping and Delivery**
 - * Requester: Foster, Cheryl
 - * Deliver-to Location: Middlebury, VT - Main Campus
 - Destination Type: Expense
- Billing**
- Favorite Charge Accounts**
 - Table with columns: Primary, * Nickname, * Charge Account, Delete
 - Content: No data to display.
- Buttons: Save and Close, Cancel

Here you can default:

1. Shipping and Delivery
2. Billing

To find your preferred deliver-to location, click on the search icon:

Edit Requisition Preferences

Select the requisitioning BU where your preferences will be applicable.

Requisitioning BU: GMHEC BU

Shipping and Delivery

* Requester: Foster, Cheryl

* Deliver-to Location: Kennedy Brothers

Billing

Favorite Charge Accounts

Primary	* Nickname	* Charge Account	Delete
No data to display			

Save and Close Cancel

You can search from this pop-up:

Search and Select: Deliver-to Location

Search

Match: All Any

** Name: Kennedy Brothers

** Code:

Search Reset

Name	Code	Address
No rows to display		

OK Cancel

However, doing an advanced search can find more results. Click the "Advanced" button (see above). Another pop-up will appear. Under any of the search criteria choose "Contains" – this will allow you to search any word that may be contained in the address you are looking for:

Search and Select: Deliver-to Location

Search

Match: All Any

** Name: Contains Kennedy Brothers

** Code: Starts with

Town or City: Starts with

Postal Code: Starts with

Country: Starts with

Search Reset Add Fields Reorder

Name	Code	Address
No rows to display		

OK Cancel

Click the search button and all addresses containing the search criteria will pop-up below. Highlight the address you want, and click “OK”

Search and Select: Deliver-to Location [X]

Search [Basic]

Match All Any ** At least one is required

** Name Contains

** Code Starts with

Town or City Starts with

Postal Code Starts with

Country Starts with

[Search] [Reset] [Add Fields] [Reorder]

Name	Code	Address
Kennedy Brothers	GMHEC KB	11 Main Street, Kenn...

[OK] [Cancel]

You can also create “Favorite Charge Accounts” by clicking the “+” sign to the right of “Favorite Charge Accounts”.

Favorite Charge Accounts [X]

Primary	* Nickname	* Charge Account	Delete
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/> [Account Icon]	[X]

Create a nickname and add your charge account by clicking the account icon:



Add your account information when the next pop-up appears. Hit “OK”, and then “Save and Close” when you’re done.

Preferences

Charge Account [X]

Hide Segments

Entity 100 Green Mountain Higher Education Consortium, Inc.

Department 1100 Shared Services

Object

Restriction 10 Unrestricted

Designation 000000 Default

Activity 00000 Default

Intercompany 000 Default

Future1 0 Default

[Search] [Reset] | [OK] [Cancel]

Save and Close

	<p>You're all set.... But ALWAYS double-check your Deliver-To and Billing information whenever performing a Self-Service Procurement action! You may not want to use your default.</p>
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