

## Creating and Using C-FOAPAL Code Favorites

If you are responsible for entering C-FOAPAL information on a requisition, you could create Code Favorites for the common C-FOAPAL strings you use. Creating and using Code Favorites will assist you with processing requisitions quicker and with less C-FOAPAL errors. This job aid details how to create an accounting code favorite, apply an accounting code to a requisition, and apply a specific account code at the line level.

### Creating Code Favorite FOAPAL

1. Log in to iBuy.
2. Click **User** (silhouette icon) found on the top right-hand of the page.
3. Select **View My Profile** in the drop-down menu.
4. Navigate to the following pages on the left column to verify that the information is accurate:
  - Under **View My Profile**, the **User's Name, Phone Number, Email, etc.** page.
  - Under **User Roles and Access**, the **Assigned Roles** page.
  - a. **NOTE:** Updates to phone number must be done through [My UI Info](#). All other updates should be done through a Unit Security Contact (USC).
5. Under **Default User Settings**, select **Custom Field and Accounting Code Defaults**.
6. Click the **Codes Favorites** tab.
7. Click **Add**.
8. Enter a name for the string in the **Nickname** field to help identify the purpose of the C-FOAPAL.
9. Use the **Select from all Values** option to search for the desired value for each segment.
  - a. **NOTE:** It is recommended to select the option that contains the appropriate Chart indicator for your university.
    - **-1** represents Urbana
    - **-2** represents Chicago
    - **-4** represents Springfield
    - **-9** represents System
  - b. **NOTE:** Using the steps above will validate that the desired option is associated with your Chart and will provide a description of the segment to further confirm the correct option has been selected.
10. You may opt to only include **Chart-Fund-Organization-Program** as a code favorite and edit the remaining segments as needed on the requisition.
11. Confirm that the **Purchasing Department** and **Purchasing Supervisor** correspond to the Chart selected.

12. Click **Save**.

## Make Code Favorite a Default Value

1. Click **Edit** associated with the desired Code Favorite.
2. Select **Default**.
  - a. **NOTE:** As the default, this Code Favorite will auto-populate when creating a requisition.
3. Click **Save**.

## Using Code Favorite Options on a Requisition

1. Click **Proceed to Checkout** once draft cart is completed.
2. In the **Accounting Codes** section, click the **pencil icon** to edit.
3. To review the code favorites options, hover on the bottom right corner of the **Accounting Codes** section and click the **heart icon**.
4. Select the nickname from the drop-down menu that appears. These are the Code Favorites you have added to your profile using the steps above.
5. To recalculate or validate the code favorite changes, hover on the bottom right corner of the **Accounting Codes** section and click the **check mark icon**.
6. Click **Save Changes**.

## Using Code Favorite Options on a Requisition at the Line Level

1. Click **Proceed to Checkout** once draft cart is completed.
2. Click the **three dots icon** next to the line item that needs a specific accounting code string.
3. Click **Accounting Codes** from the choices.
4. To review the code favorites options, hover on the bottom right corner of the **Accounting Codes** section and click the **heart icon**.
5. Select the nickname from the drop-down menu that appears. These are the Code Favorites you have added to your profile using the steps above.
6. To recalculate or validate the code favorite changes, hover on the bottom right corner of the **Accounting Codes** section and click the **check mark icon**.
7. Click **Save Changes**.

For information on splitting FOAPAL codes, please refer to the *Splitting FOAPAL Codes* job aid under the Shopping and Requisition Creation section.