Profile Settings and Options
Profile Settings and Options

- This guide will illustrate
  - How to update default shipping and billing addresses
  - How to create default shopping settings
  - How to identify your approvers
  - How to find your permission settings
Click on the Profile icon at the top of the Shopping Home Page
User Profile and Preferences > User’s Name, Phone Number, Email, etc.
- Your basic profile information will be populated for you.
Default User Settings > Custom Field and Accounting Code Defaults

• Save your frequently used Purpose Code and Account combinations under Code Favorites.
Default User Settings > Default Addresses

- To add default addresses to your profile, click Select Addresses for Profile to enable the Address Search
- Search by keyword or building code
Default User Settings > Cart Assignees

• Save frequently used names to assign your shopping carts, such as Requesters and additional Approvers.
• Click Add Assignee to generate a user search for UD employees.
User Roles and Access > Assigned Roles

- View the level of access that you have in UD Exchange, for example: Shopper, Requester, Approver.
User Roles and Access > Access

- View which departments you can access to search documents in UD Exchange.
User Roles and Access > User Purchasing and Approval Limit Values

- View your various purchasing limits in UD Exchange.
Ordering and Approval Settings > View Assigned Approval Folders
- View Approval folders assigned to you
- Filter by Type
Permission Settings > Shopping Carts & Requisitions > Shopping
• View your UD Exchange Shopping Permissions
Permission Settings > Shopping Carts & Requisitions > Cart/Requisition
• View your UD Exchange Requisition Permissions
Permission Settings > Orders > My Orders/Organization Orders

- View your visibility of orders in UD Exchange.
- View your permissions related to action on orders in UD Exchange.
Permission Settings > Orders > Change Requests

- View your visibility of change requests in UD Exchange.
- View your permissions related to action on change requests in UD Exchange.
Permission Settings > Approvals
- View your permissions related to approvals in UD Exchange including Requisitions and Purchase Orders.
Notification Preferences

- View and modify notifications you receive regarding Shopping, Requisitions, and Purchase Orders.
User History > View User’s History
- View changes and updates made to your user profile and access in UD Exchange
Resources

Procurement Services
procurement@udel.edu