

Financial Processing – Purchasing (PUR)

Shopping Profile

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| Document Summary | |
| Product Owner / Author | Riaan Prinsloo |
| Editor Name | Chimoné Barends |
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| Lesson Objectives | |
|  | On completion of this lesson you should be able to:   * Navigate to Shopping Profile * Navigate to the Account * Create a Profile |
| Lesson Scenario | |
|  | * As an existing staff member of the NWU you are required to work on the KFS system as an Initiator of your Department. One of your key roles in the department is to do shopping for the obtaining of goods from the different stores. * This lesson will show you how create a shopping profile to do shopping for future purposes. |
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| Lesson Prerequisites | |
|  | * You need to be a NWU staff member that is registered on KFS as a user. |

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## Main Menu

**KFS navigation:** **Main Menu >** **Shopping** **>** **Shopping**

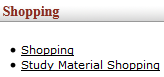


Figure 1

|  |  |
| --- | --- |
| 1. | Click on **Shopping**. |

1. **Shopping Portal Layout**

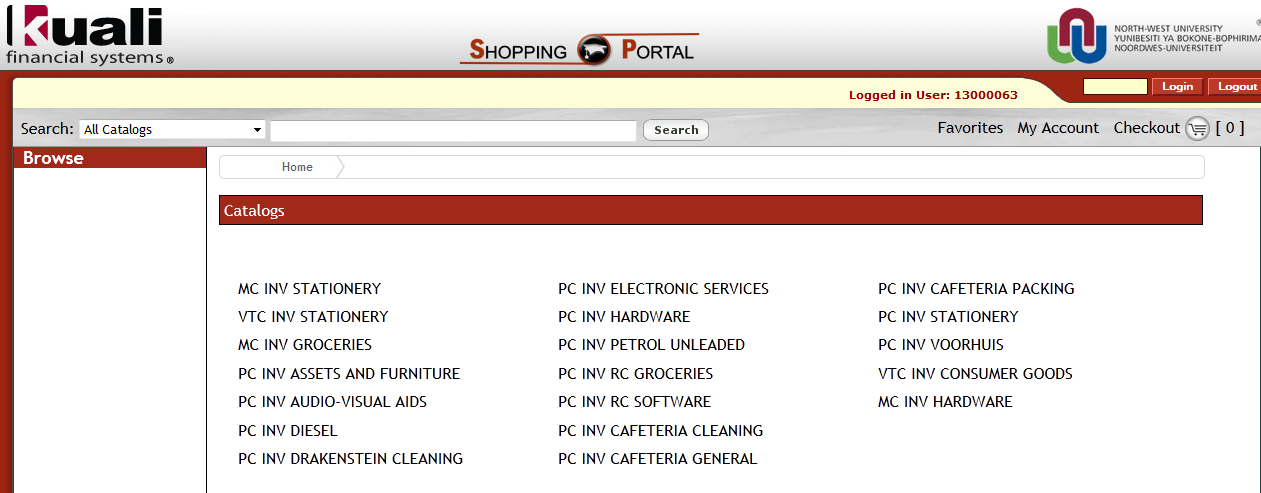


Figure 2

|  |  |
| --- | --- |
| 1. | Click on |

1. **My Account - Customer Information:**

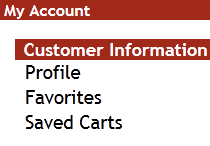


Figure 3

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| --- | --- |
| 1. | Click on **Profile** below Customer Information. |

**3.1 Profile Maintenance: Edit Profile: DEFAULT**

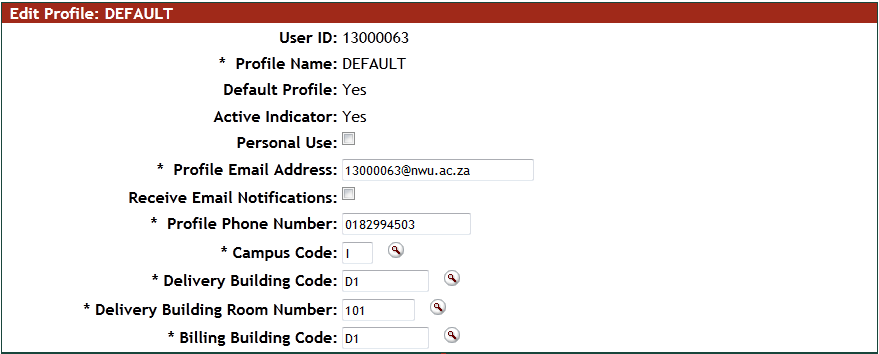


Figure 4

* Enter all the required information of the requestor.

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| 1. | Complete or searchicon the **Delivery Building Code**. |
| 2. | Complete or searchicon the **Delivery Building Room Number**. |
| 3. | Complete or searchicon the **Billing Building Code**. |

**3.2 Default Ship-To Address and Default Billing Address**

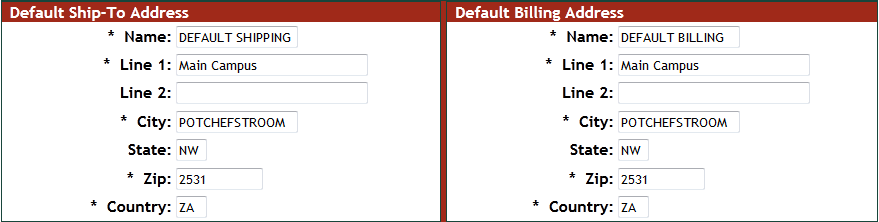


Figure 5

**3.3 Accounting**

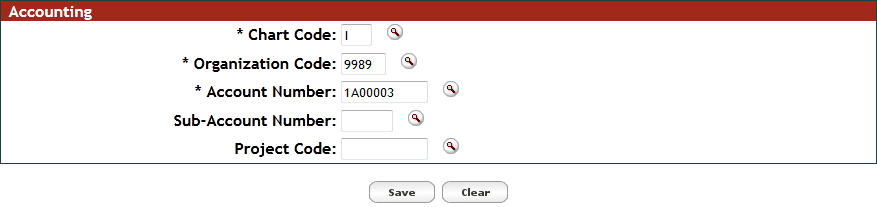


Figure 6

|  |  |
| --- | --- |
| 1. | Complete or searchicon the **Chart Code**. |
| 2. | Complete or searchicon the **Organization Code**. |
| 3. | Complete or searchicon the **Account Number**. |
| 4. | Click on button-save |

**3.4 Click on Save**

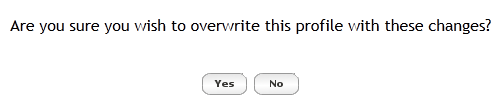


Figure 7

|  |  |
| --- | --- |
| 1. | Click on button-yes if you wish to overwrite your profile changes. When you click on button-yes, will the system indicates your |
| 2. | Click on button-no if you don’t want to overwrite your profile changes anymore. |
| 3. | **Please Note**:  If your screen is blank, please contact your IT-Help on Campus for assistance on your Firefox version. It is recommended to down-grade to an older version so that KFS can work properly. |

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| 1. **Lesson Summary** | |
|  | Having completed this lesson you should be able to:   * Navigate to Shopping Profile * Navigate to the Account * Create a Profile |