How to Create Account Code Favorites

To save time in selecting the Account String for a requisition, you can add your commonly used Account Strings to your Profile. Then, when you are working on a requisition these Account Strings will be easily accessible to you from a drop-down list in the Account Code section of the requisition (rather than having to search for the Account String each time).

Following is the procedure for adding Account Codes to your Profile:

1. After logging into Gateway, click on the Profile link (next to your name in the header on the window).

2. Once in the profile settings, click on the Purchasing tab, then the Custom Fields tab in the second row, then Code Favorites in the third row.

3. In Code Favorites, click on the “Add” button which will bring up the Account Code form.

4. In the Account Code form, you will need to modify the three fields shown in the graphic below per the following steps:
a. In the **Nickname** field, type in whatever nickname you would like to associate with this **Account String** (this nickname will only be associated in your profile). If you want this to be your default account to auto-populate on each of your requisitions, click the “Default” checkbox.

b. In the **Department** field, press the “Select from all values...” link, and search for ELEG in the Value field of the search window. Press search, and select ELEG from the search results.*

c. In the **Account String** field, click the “Select from all values...” link, and enter a keyword or project code in the Description field. Press search, and select the desired account from the search results.*

d. Press the **Save** button in the Account Code form, and this Account String is now added to your favorites.

5. Repeat Steps 4 & 5 above to add additional Account Strings to your profile.

* For more details on selecting the Department code or Account String, see the procedure called “How to enter the Account String in Gateway”

**How to Select an Account String in the Requisition**

Once you have added one or more **Account Strings** to your profile, you can easily select one of them from a drop-down list in the **Requisition** per the following:

1. After you finalize your cart, in the **Requisition** screen scroll down to the **Accounting Codes** section and press the Edit button. The **Account Code** window should pop up, and includes a drop-down field that allows you to “Select from your code favorites”

2. Click the drop-down field, and the nicknames of the **Account Strings** you added to your profile should show up.

3. Select the nickname of the **Account String** you wish to use, and the **Department** and **Account String** fields should auto-populate in the **Account Code** form.

4. Press the **Save** button in the **Account Code** form.