How to enter the Account String in Gateway

After you finalize your cart, you will be taken to the Requisition screen to finish up your order. Any required items that aren’t yet filled in on the requisition will be brought to your attention by red alert icons.

Commonly, the Account String is one of the required items you will need to enter. Following is the procedure for entering the Account String:

1. To edit the Account String, click on the “Required field: Account String” alert (this is a link, even though it may not look like one), or scroll to the Accounting Codes section on the requisition and press the edit button.

2. Once in the edit Account Code screen, you first need to select a department code to populate the Department field.
   a. In the Department field, click on the “Select from all values...” link.
   b. A generic Custom Field Search window should pop up. In the Value field type “ELEG” and then press the Search button.
   c. In the search results, press the Select button.

3. Next, you need to choose an Account String (note: you will not be able to choose an Account String until you choose a department code in the Department field – step 2 above).
   a. In the Account String field, click on the “Select from all values...” link.
b. Once again, a generic Custom Field Search window should pop up. This time, instead of typing in the Value field, you will search for the account string by typing a key word in the Description field. For example, if you know your account’s project code (i.e., FGCP10), you would enter “FGCP10” in the Description field to search for the account string associated with that project code. Similarly, if you know the account’s fund number (i.e., 24987), you would enter “24987” in the Description field. Other keywords, including PI name, project title, and agency are also searchable in the Description field. Note: Be sure to do this search in the Description field, not the Value field, or you likely won’t get any results.

![Custom Field Search](image.png)

4. From the search results, select the account string you want to use for this order.

4. Now that you have selected the Department and Account String, press the Save button in the Account Code window (you do not need to provide values for any of the other fields in the Account Code window).

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To add Account Strings to your profile for quick retrieval for future order, see the procedure called “How to Create Account Code Favorites.”