

How to Create Account Code Favorites

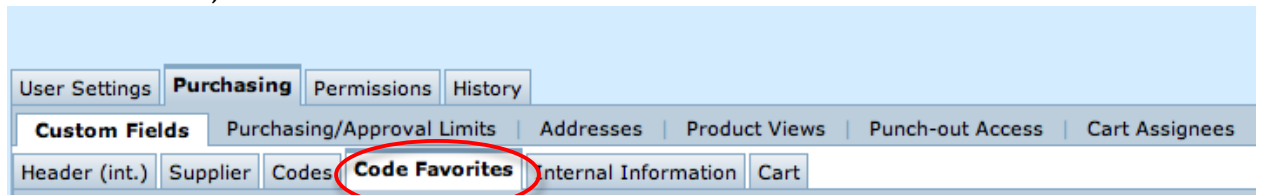
To save time in selecting the *Account String* for a requisition, you can add your commonly used *Account Strings* to your Profile. Then, when you are working on a requisition these *Account Strings* will be easily accessible to you from a drop-down list in the *Account Code* section of the requisition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

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

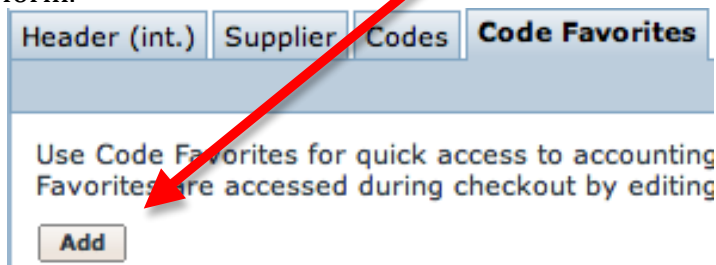
1. After logging into Gateway, click on the [Profile](#) link (next to your name in the header on the window)



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:

Account Code

Nickname Default

Department Account String

[Select from all values...](#)

- 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”

The screenshot shows the 'Account Code' form. At the top, there is a dropdown menu labeled 'Select from your code favorites' which is highlighted with a red rectangular box. Below this, there are two input fields: 'Department' and 'Account String'. The 'Department' field has a dropdown menu with the text 'Select from profile values...'. The 'Account String' field has a red error icon and the text 'Required field'.

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

The screenshot shows the 'Account Code' form with the dropdown menu open. The dropdown menu is positioned over the 'Department' field and contains the following options: 'Dept Shop', 'Main Account', 'Nan', and 'Rose Overhead'. The 'Dept Shop' option is currently selected, indicated by a checkmark and a blue highlight.

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.