What is it?

When on the checkout screen for your CU Marketplace Cart, Requesters must ensure the Accounting Code (ChartString) information is complete and correct before submitting as a Requisition into approval workflow. Shoppers have the option to enter this information but are not required to do so.

If ChartString information is not complete, you must enter it before checking out. If you created default values in your Profile (refer to the Modifying Profile Settings in the CU Marketplace job aid), those values will be populated with that information.

You have the option to split the ChartString distribution to add additional lines and indicate a percent or dollar amount for each line.
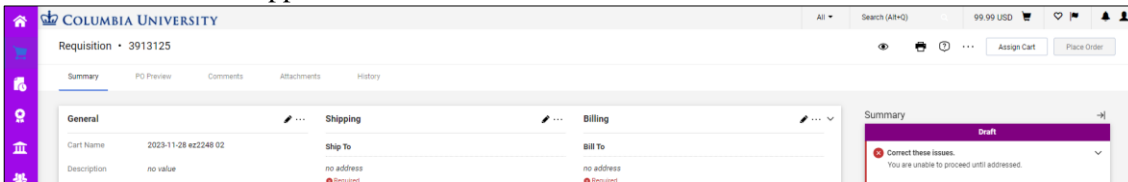
Viewing a Requisition to Update Accounting Codes (ChartString)

In order to update the ChartString (Accounting Codes), you must proceed to Checkout in order to view the Requisition screen.

On the Shopping Cart page, click the **Proceed to Checkout** button.
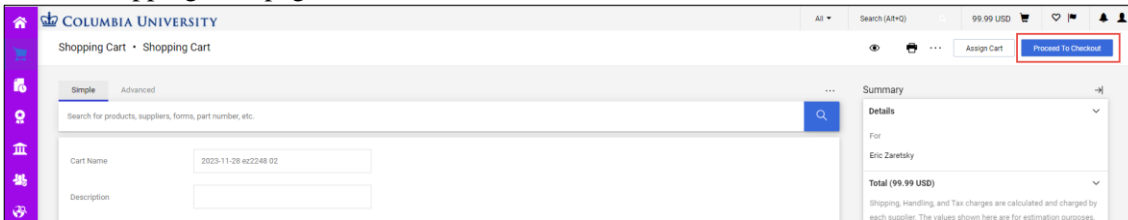
The Checkout screen appears.

Updating and Adding Accounting Codes (ChartString) at Checkout

1. On the Checkout screen, click the **Edit** ✏️ icon for Accounting Codes.

The Edit window will appear. It will display the default or populated ChartFields,

2. Update the ChartFields as needed. ChartFields must be entered in order left to right as the available values are dependent on the value in the previous field. Click the **Dropdown** ↙ arrow in the field you are populating to view the available values and select the matching value.

3. Click the **Validate** ✓ icon to ensure your ChartFields were entered correctly. If you corrected a ChartField and it still appears as Required [1403102 🔍 ⊘Required], click the Validate icon again.

＋ You can click the **Add Split** icon to add additional ChartString lines.

♥ You can click the **Code Favorites** icon to select a favorite ChartString if you created one in your Profile.

4. If you clicked Add Split, select **% of Price** or **Amount of Price** in the last column heading. Enter the % or amount in each line of your distribution depending on your selection. The Split Total must equal 100% or the total dollar amount.

5. Click the **Save** button.

Each item in your Cart can also be updated with different ChartStrings. Click the **Line Item Actions** icon for the item and select **Accounting Codes**.

Where do I get help?

Please contact the Finance Service Center

http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now

https://columbia.service-now.com

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IN THE CITY OF NEW YORK