

In This Guide

- ✓ Assign multiple funding sources to a requisition
- ✓ Split funding by percentage or amount

This guide provides the steps required to assign multiple funding sources to a requisition line item. It also details how to split funding sources by percentage or amount.

Procedure

1. Once you have populated your shopping cart and initiated the checkout process, select the  process step or by clicking on the **Accounting** tab under the Requisition window (shown below).



It is recommended to set accounting defaults to make the checkout process more efficient. See the Manage User Profiles job aid for information related to setting default accounting information.

Note: Depending on the settings in your user profile, you may or may not have default values present for the source of funding. For the purposes of this job aid, default values have been populated based on the user profile.

2. Select the  icon for the line you wish to allocate to multiple funding sources. If you wish to apply the same split funding for all lines on the requisition, select the  icon in the **Accounting** section of the screen.

3. A pop-up window will appear with the existing accounting information for the requisition line (or entire requisition if so selected). Select the **add split** icon to insert a second accounting distribution line to the requisition.

Accounting (Enter Index and Account other elements driven by Index and will populate when save)

Index	Account Code	Fund	Organization	Program	Activity	Location	% of Price	add split
134201 <small>Select from all values...</small>	72162 <small>Select from all values...</small>	111220	06CB11	19				remove
134201 <small>Select from all values...</small>	72162 <small>Select from all values...</small>	111220	06CB11	19			0	remove

Split Total 0% add split

recalculate / validate values show monetary calculations

Save **Cancel**

4. Select the method for splitting funding sources. You have for options: percent of price, percent of quantity, amount of price, or amount of quantity.

% of Price add split

- % of Price
- % of Qty
- Amount of Price
- Amount of Qty

remove



If splitting at the requisition header level, only three options are available: percent of price, percent of quantity, and amount of price.

5. Once a split option is selected, add a percentage or amount depending on the option chosen and select the **recalculate / validate values** icon. If splitting by price, an error message will be displayed if the total does not equal to the line total. If splitting by percentage, an error message will be displayed if the total does not equal 100%

Accounting (Enter Index and Account other elements driven by Index and will populate when save)

Index	Account Code	Fund	Organization	Program	Activity	Location	% of Price	add split
134201 <small>Select from all values...</small>	72162 <small>Select from all values...</small>	111220	06CB11	19			50	remove
134201 <small>Select from all values...</small>	72162 <small>Select from all values...</small>	111220	06CB11	19			50	remove

Split Total 100% add split

recalculate / validate values show monetary calculations

Save **Cancel**

6. Add additional split lines if required by selecting the **add split** icon.

Accounting (Enter Index and Account other elements driven by Index and will populate when save)

Index	Account Code	Fund	Organization	Program	Activity	Location	% of Price		
134201 <small>Select from all values...</small>	72162 <small>Select from all values...</small>	111220	06CB11	19			50	add split remove	
134201 <small>Select from all values...</small>	72162 <small>Select from all values...</small>	111220	06CB11	19			50	remove	
							Split Total	100%	add split
<small>recalculate / validate values show monetary calculations</small>									

Save **Cancel**

7. Once all split lines have been added and any calculation errors have been resolved, select the **Save** icon. You will be returned to the **Accounting** section of the screen where the split funding information is displayed.

Fisher Scientific 330 1 more info...
Purchasing Buy From 2
Part of ThermoFisher Sci, 4500 Turnberry Drive, Hanover Park, IL 60133-5491 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 2-NAPHTHOYL CHLORIDE 10GR <small>more info...</small>	AC376590100	EA	49.98	2 EA	99.96 USD

Accounting (Enter Index and Account other elements driven by Index and will populate when save)
values have been overridden for this line

Index	Account Code	Fund	Organization	Program	Activity	Location	% of Price	edit
134201 Neurology	72162 Research and Laboratory Supplies	111220 Medicine	06CB11 Neurology Dept Administration	19 Instruction A-21 Analysis Required	no value	no value	50%	
134201 Neurology	72162 Research and Laboratory Supplies	111220 Medicine	06CB11 Neurology Dept Administration	19 Instruction A-21 Analysis Required	no value	no value	50%	

Supplier subtotal **99.96 USD**

Subtotal **99.96**
Total **99.96 USD**

You have successfully split funded a requisition.