

HOW TO ADD MULTIPLE BUDGET LINES WHEN CREATING A PO/REQ

To add more than one budget line, select add row and either look up budget code by clicking on "L" or if already known, type budget code directly into field.
 Do not type anything into the percent boxes, those will autofill later.

The screenshot shows the 'Requisition Entry' window for '65 - NOVATO UNIFIED SCHOOL DISTRICT'. The 'Accounts' section contains a table with the following data:

Ln	Fd	Reac	Objt	Gr	Goal	Funct	Sch	Resp	lcl	Percent	Budget	Balance
1	L	01-0000-0-4300-00-0000-7200-781-111-000								00	1,500.00	
2	L											

A red circle highlights the 'L' button in the first row of the table. A blue arrow points to the 'Percent' column of the second row, with a text box that says 'DO NOT TYPE IN HERE'.

Continue adding lines as needed, when done click on "Items".

The screenshot shows the 'Requisition Entry' window after adding more budget lines. The 'Accounts' section table now contains three rows:

Ln	Fd	Reac	Objt	Gr	Goal	Funct	Sch	Resp	lcl	Percent	Budget	Balance
1	L	01-0000-0-4300-00-0000-7200-781-111-000								33.33	500.00	
2	L	01-0000-0-4300-00-0000-7300-781-111-000								33.33	15.11	
3	L	01-0000-0-5840-00-0000-7300-781-111-000								33.34	47,773.47	

The 'Items' button in the top toolbar is highlighted with a red circle.

HOW TO ADD MULTIPLE BUDGET LINES WHEN CREATING A PO/REQ

Under SPLIT select "SPECIAL DOLLAR", this will allow you to enter the specific dollar amount per budget line. If you wish to use percentages, then use "CALCULATE PERCENTAGES".

The screenshot shows the 'Requisition Entry' window for '65 - NOVATO UNIFIED SCHOOL DISTRICT'. The 'Split' dropdown menu is highlighted with a red circle and set to 'Special Dollar'. Below it, the 'Accounts' table is visible:

Ln	Fd Resc	Objt Gr	Goal Fnct	Sch Rsp	lcl	Item Amount	Amount
1.	01-0000-0-4300-00-0000-7200-781-111-000					1,000.00	0.00
2.	01-0000-0-4300-00-0000-7300-781-111-000					2,000.00	0.00
3.	01-0000-0-5840-00-0000-7300-781-111-000					2,000.00	0.00

If there is not enough money available on a budget line, it will give you this information in a error pop-up box:

The screenshot shows the 'Requisition Entry' window with an error pop-up box. The error message is: "Error: Insufficient funds on standard ACCOUNT record for account: 01-0000-0-4300-00-0000-7300-781-111-000". The background shows the 'Accounts' table with budget balances:

Ln	Fd Resc	Objt Gr	Account	Budget Balance
1.	01-0000-0-4300-00-0000-7200-781-111-000			1,500.00
2.	01-0000-0-4300-00-0000-7300-781-111-000			1,015.11
3.	01-0000-0-5840-00-0000-7300-781-111-000			50,773.47

HOW TO ADD MULTIPLE BUDGET LINES WHEN CREATING A PO/REQ

When going in to correct an error or make a change, please note that the Tax will automatically default to YES. If it's supposed to be NO, you'll have to change it EVERY TIME (thanks QSS!!)

Requisition Entry 65 - NOVATO UNIFIED SCHOOL DISTRICT QSS/OASIS

Subject to tax: 0.00 Rate: 8.500 % Sub Total: 5,000.00 Total Tax: 0.00 Total: 5,000.00

Item	Print	Split	Quantity	Unit	Unit Cost	Total Cost	Tax	Stock #	Fixed Asset
1	Yes	Special Dollar	1.00	EA	5,000.0000	5,000.00	Yes	000000	

Discount Flag: No Discount Discount Percentage: .0000 % Discount Amount: 0.00

Description: OPEN PO 59 lines remaining.

Ln	Fd Resc	Objt Gr	Goal	Funct Sch	Rsp lcl	Item Amount	Amount
1.	01-0000-0-4300-00-0000-7200-781-111-000					1,000.00	1,000.00
2.	01-0000-0-4300-00-0000-7300-781-111-000					1,000.00	2,000.00
3.	01-0000-0-5840-00-0000-7300-781-111-000					3,000.00	2,000.00

Item	Print	Split	Quantity	Unit	Unit Cost	Sub-Total	Estimated Tax	Est. Total w/ Tax	Tax	Stock#
1	Y	SD	1.00	EA	5,000.0000	5,000.00	0.00	5,000.00	N	00000

Once your REQ is error free, it will assign a REQ number.

Requisition Entry 65 - NOVATO UNIFIED SCHOOL DISTRICT QSS/OASIS

Add successful.

Requisition: *New* Purchase Order: Control #: Warehouse: Stores Order:

Vendor/Addr#: 117249 / 00-THE HOME DEPOT P Date: 03/13/2024

PO Type: Delivery By: Confirming: 0 - No confirmation message

Description: TEST Tax %: 8.500 % B Ship To: 0001 NUSD Business Services (0001)

Submitted by: TTWEEDIE Terms: Commodity:

Site: 0001 BUSINESS SERVICES (0001) FOB:

Buyer: Program: Misc Date: Misc:

Routing Group: BUS SERVICES Room: Discount: .000 % Shipping %: 00

Ln	Fd Resc	Objt Gr	Goal	Funct Sch	Rsp lcl	Percent	Budget Balance
1.	L	01-0000-0-4300-00-0000				33.33	1,500.00
2.	L	01-0000-0-4300-00-0000				33.33	1,015.11
3.	L	01-0000-0-5840-00-0000				33.34	50,773.47

Requisition Number 242068 has been added.

Address (00) Additional Shipping Beg Message End Message

Vendor: HOME DEPOT U.S.A. INC
THE HOME DEPOT PRO
2455 PACES FERRY ROAD
ATLANTA, GA 30339

Remit: THE HOME DEPOT PRO
P O BOX 404488
ATLANTA, GA 30384-4468

HOW TO ADD MULTIPLE BUDGET LINES WHEN CREATING A PO/REQ

Please note that the percentages on the "main" REQ page are wrong (I do not know why, thanks AGAIN QSS!!)

Ln	Fd	Resc	Objt	Gr	Goal	Funct	Sch	Rsp	lcl	Percent	Budget Balance
1.	L	01-0000-0-4300-00-0000-7200-781-111-000								33.33	500.00
2.	L	01-0000-0-4300-00-0000-7300-781-111-000								33.33	15.11
3.	L	01-0000-0-5840-00-0000-7300-781-111-000								33.34	47,773.47

However, if you take a look at the PO/REQ Quick View, which is what will eventually become your PO, the percentages are correct (consistent much?!)

Item	Split	Ordered/	Received	Unit	Unit Cost	Total Cost	Discount	Tax	Stock	No	F
1	D	1.00/	0.00	EA	5,000.0000	5,000.00	.00	N	000000		
						20.0000*					
						20.0000*					
						60.0000*					

Ln	Fd	Resc	Objt	Gr	Goal	Funct	Sch	Rsp	lcl	Amount
1	01-0000-0-4300-00-0000-7200-781-111-000									1,000.00
2	01-0000-0-4300-00-0000-7300-781-111-000									1,000.00
3	01-0000-0-5840-00-0000-7300-781-111-000									3,000.00
Total:										5,000.00

TA-DA!!! You have just now added multiple budget lines to a REQ in specified dollar amounts! HUZZAH!!!