

Splitting Account Codes by Purchase Requisition

1. When you have completed shopping and are ready to checkout, proceed to checkout from your shopping cart (Figure 1).

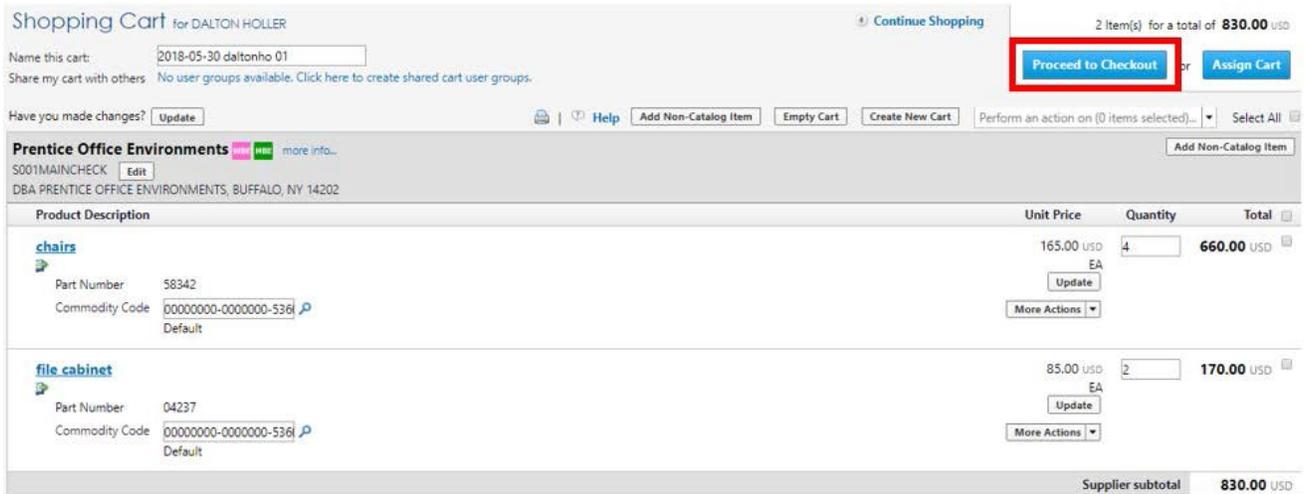


Figure 1

2. Navigate to the accounting information by selecting the "Accounting Codes" tab. Next, select "Edit" under the Accounting Codes section (Figure 2).

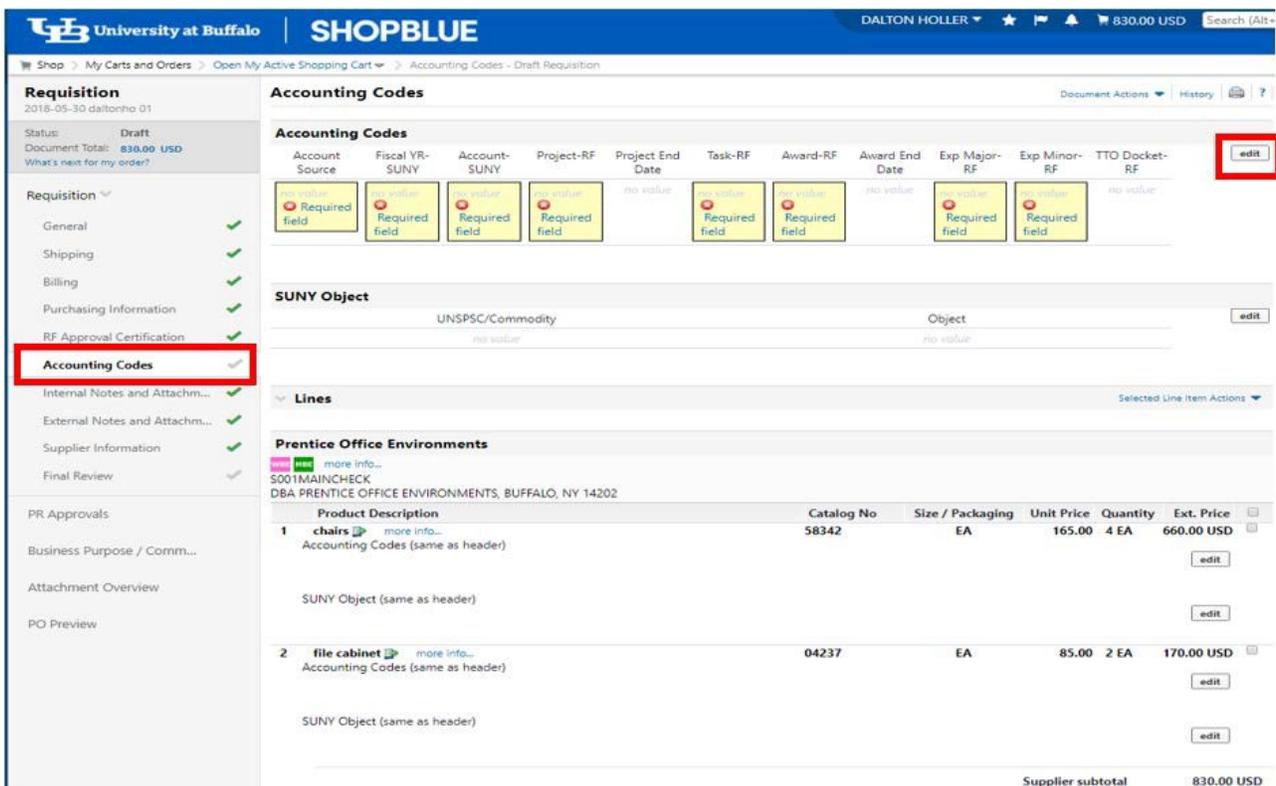


Figure 2

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- Once in accounting codes, select “add split” (Figure 3). *Note: select this button additional times to add additional accounts.*

The screenshot shows the 'Accounting Codes' form with various input fields for Account Source, Fiscal YR-SUNY, Account-SUNY, Project-RF, Project End Date, Task-RF, Award-RF, Award End Date, Exp Major-RF, Exp Minor-RF, and TTO Docket-RF. Each field has a 'no value' indicator and a 'Required field' label. A red box highlights the 'add split' button in the top right corner. At the bottom, there are 'Save' and 'Cancel' buttons.

Figure 3

- Based on your funding source, enter the appropriate accounting codes and information by clicking “Select from profile values...” under each column. You can select the appropriate choice from the dropdown menu. You will have multiple lines in which you can enter multiple accounting codes (Figure 4). *Note: you cannot mix RF and State funding on one purchase req.*

This screenshot shows the 'Accounting Codes' form with two lines of data entry. Red boxes and arrows highlight the 'Select from profile values...' dropdown menu in the 'Account Source' column for both lines. The form includes columns for various funding sources and a '% of Price' dropdown menu. At the bottom, there are 'Save' and 'Cancel' buttons, and a 'Split Total 0%' indicator.

Figure 4

- Once all accounting codes have been entered, choose the way in which to split the cost between accounts from the dropdown menu (Figure 5).

The screenshot shows the 'Accounting Codes' form with the '% of Price' dropdown menu highlighted in a red box. The dropdown menu is open, showing options: '% of Price', '% of Price', and '% of Qty'. The form includes columns for various funding sources and a 'Split Total 0%' indicator. At the bottom, there are 'Save' and 'Cancel' buttons.

Figure 5

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- After you choose how to split the cost between accounts, enter the desired quantity for each amount. You can then select "Save" to finish (Figure 6).

Accounting Codes ? X

Select from your code favorites

Account Source	Fiscal YR-SUNY	Account-SUNY	Project-RF	Project End Date	Task-RF	Award-RF	Award End Date	Exp Major-RF	Exp Minor-RF	TTO Docket-RF	% of Price	
S Select from profile values...	2017 Select from profile values...	74007900-28030 Select from profile values...	N/A	N/A	N/A	N/A	N/A	Select from all values...	Select from all values...		60	remove
S Select from profile values...	2017 Select from profile values...	90075500-28030 Select from profile values...	N/A	N/A	N/A	N/A	N/A	Select from all values...	Select from all values...		40	remove

Split Total 100% add split

[recalculate / validate values](#) [show monetary calculations](#)

Figure 6

- After you've entered the accounting codes and split method, you are ready to place your order. Notice the split of accounting codes at the header of the "Accounting Codes" tab (Figure 7). *Note: the example used is state funding.*

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Shop > My Carts and Orders > Open My Active Shopping Cart > Accounting Codes - Draft Requisition

< Return to shopping cart

This order is ready to be placed.

Requisition
2018-06-06 mweber2.01

Status: Draft
Document Total: 830.00 USD
What's next for my order?

Requisition

- General
- Shipping
- Billing
- Purchasing Information
- RF Approval Certification

Accounting Codes

- Internal Notes and Attachm...
- External Notes and Attachm...
- Supplier Information
- Final Review

PR Approvals

- Business Purpose / Comm...
- Attachment Overview
- PO Preview

Accounting Codes Document Actions History ?

Account Source	Fiscal YR-SUNY	Account-SUNY	Project-RF	Project End Date	Task-RF	Award-RF	Award End Date	Exp Major-RF	Exp Minor-RF	TTO Docket-RF	% of Price
S State	2017 Fiscal Year 2017-2018	74007900-28030 PHARMACEUTICS	N/A RF Only	N/A RF Only	N/A RF Only	N/A RF Only	N/A RF Only	N/A RF Only	N/A RF Only	no value	60%
S State	2017 Fiscal Year 2017-2018	90075500-28030 FINANCIAL MANAGEMENT	N/A RF Only	N/A RF Only	N/A RF Only	N/A RF Only	N/A RF Only	N/A RF Only	N/A RF Only	no value	40%

Lines Selected Line Item Actions

Prentice Office Environments
030PRENTICE
472 Franklin Street, Buffalo, NY 14202-1302 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 chairs Accounting Codes (same as header)	58342	EA	165.00	4 EA	660.00 USD
2 file cabinet Accounting Codes (same as header)	04237	EA	85.00	2 EA	170.00 USD

Supplier subtotal 830.00 USD

Shipping and Handling charges are calculated and charged by each supplier. Shipping and/or Freight charges exceeding \$100 should be added as a Non-Catalog line item to your requisition.

Subtotal	830.00
Total	830.00 USD

Figure 7