



Using Multiple SpeedCharts on an Invoice Line Overview

A SpeedChart is a shorthand key that auto-populates some ChartFields in one or more accounting distributions. Cardinal allows the use of a single or multiple SpeedCharts on a single Voucher Invoice Line. Using the multiple SpeedChart feature, users can split the cost of a Supplier’s goods/services between two or more departments, cost centers, etc. Users can add new Distribution Line(s) or overwrite existing Distribution Line(s) using SpeedCharts.

Navigation Note: Please note that you may see a **Notify** button at the bottom of various pages utilized while completing the processes within this Job Aid. This “Notify” functionality is not currently turned on to send emails notifications to specific users within Cardinal.

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Using the Multiple SpeedCharts Options

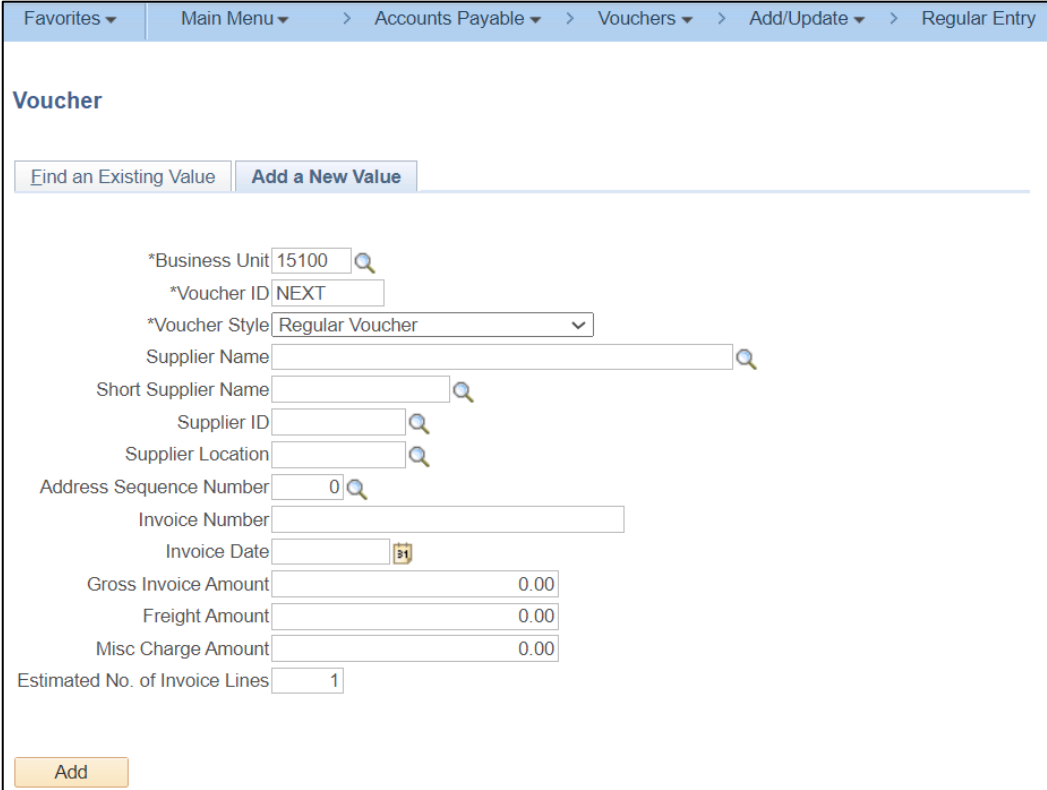

When using the **Multiple SpeedCharts** page, there are some key fields which are:

- **Invoice Line Amount:** This field displays the total amount of the Invoice
- **Remaining Amount:** This field is calculated by summing the Merchandise Amounts on the existing Distribution Lines and subtracting that amount from the Invoice Line Amount. This calculation is performed for each Line added to this page and displays the remaining balance for the Invoice Line
- **SpeedChart Key:** This field is used to enter each specific SpeedChart for cost distribution
- **Amount to Distribute:** This field is used to list the specific amount to be charged to each SpeedChart Key that is entered

These fields impact the entry of the **SpeedCharts Process Options** which are “Append” and “Overwrite”.

- When “Append” is selected, the Amount to Distribute for each Line added cannot exceed the Remaining Amount. If there is not enough Remaining Amount (e.g., Remaining Amount equals 0.00), the user must adjust the amounts of the Distribution Lines on the **Invoice Information** page prior to adding new Lines via the **Multiple SpeedCharts** page
- When “Overwrite” is selected, the sum of the Amount to Distribute for all Lines on the **Multiple SpeedCharts** page cannot exceed the Invoice Line Amount. Users can overwrite existing Distribution Lines with new Lines that total or are equal to, but not greater than, the Invoice Line total

Append (Add) a SpeedChart Distribution using Multiple SpeedCharts

Step	Action
1.	Navigate to the Voucher page using the following path: Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry
<p>The Voucher page displays with the Add a New Value tab displayed by default.</p> 	
2.	Complete the Voucher page based on the Invoice.
3.	Click the Add button. 



Step	Action
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The Invoice Information page displays.

[Favorites](#) > [Main Menu](#) > [Accounts Payable](#) > [Vouchers](#) > [Add/Update](#) > [Regular Entry](#)

[Invoice Information](#) | [Payments](#) | [Voucher Attributes](#)

Business Unit 15100 **Invoice No** 123456
Voucher ID NEXT **Accounting Date** 10/11/2024
Voucher Style Regular Voucher ***Pay Terms** 30 Net 30
Invoice Date 10/09/2024 **Basis Date Type** Prompt Payment
Invoice Receipt Date **Final Voucher**
Goods & Services **Incomplete Voucher**
Receipt Date **Incomplete Voucher**

Supplier ID 0000044036 **Control Group** **Incomplete Voucher**
ShortName IAP WORLDW-002
Location MAIN
***Address** 2
Responsible Org 10000
Customer Account #
ROW Acquisition ID

 Action

[Copy From Source Document](#)

Invoice Lines Find | View All First 1 of 1 Last

Line 1 Copy Down **SpeedChart** **One Asset**
***Distribute by** Amount **Ship To** COVA
Item **Description**
Quantity **Packing Slip**
UOM
Unit Price
Line Amount 5,620.50
 Multi-SpeedCharts

Distribution Lines Personalize | Find | View All First 1 of 1 Last

GL Chart	Exchange Rate	Statistics	Assets	FF???							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							
Copy Down	Line	Merchandise Amt	Quantity	*GL Unit	Account	Fund	Program	Department	Cost Center	Task	FI
<input type="checkbox"/>	1	5,620.50		15100							

4.

Enter the appropriate information in the Header section of this page based on the Invoice.

[Favorites](#) > [Main Menu](#) > [Accounts Payable](#) > [Vouchers](#) > [Add/Update](#) > [Regular Entry](#)

[Invoice Information](#) | [Payments](#) | [Voucher Attributes](#)

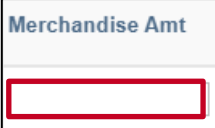
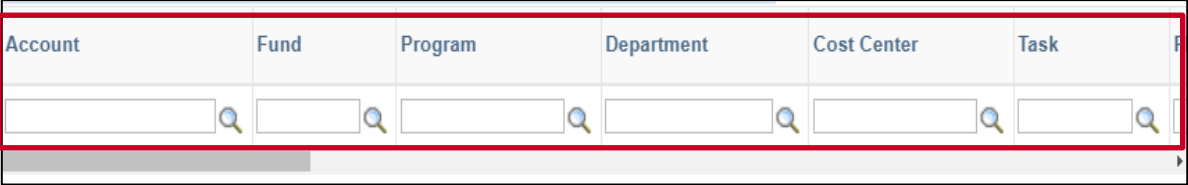
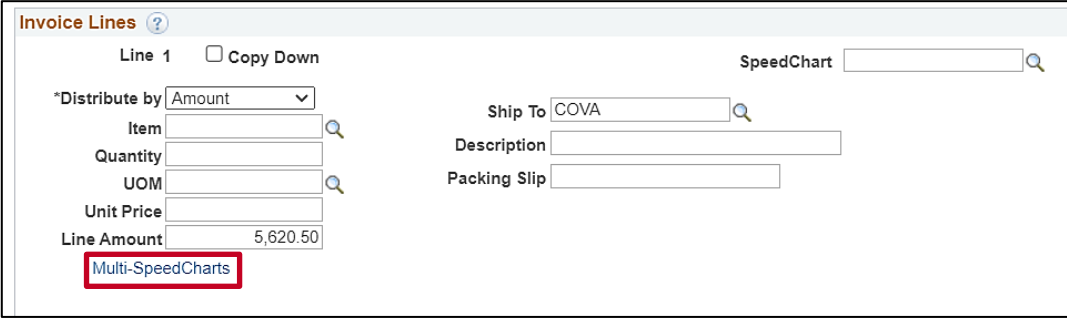
Business Unit 15100 **Invoice No** 1234567
Voucher ID NEXT **Accounting Date** 10/10/2024
Voucher Style Regular Voucher ***Pay Terms** 30 Net 30
Invoice Date 10/01/2024 **Basis Date Type** Prompt Payment
Invoice Receipt Date **Final Voucher**
Goods & Services **Incomplete Voucher**
Receipt Date **Incomplete Voucher**

Supplier ID 0000055032 **Control Group** **Incomplete Voucher**
ShortName COMPUTER-002
Location MAIN
***Address** 2
Responsible Org 10000
Customer Account #
ROW Acquisition ID

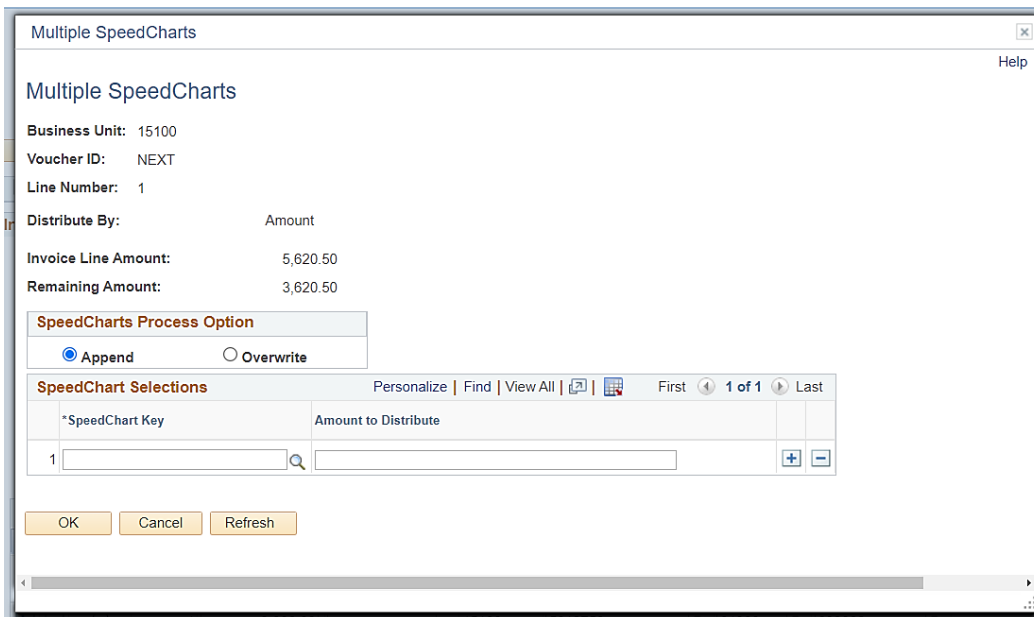
Invoice Total

Line Total	1,526.20
*Currency	USD
Miscellaneous	
Freight	
Total	1,526.20
Difference	0.00

Non Merchandise Summary
 Session Defaults
 Comments(0)
 Attachments(0)
 Template List
 Advanced Supplier Search
 Supplier Hierarchy
 Supplier 360

Step	Action
5.	Enter the amount being charged to the specific distribution in the Merchandise Amt field. 
6.	Enter the charge distribution information in the Distribution section as appropriate. 
7.	Click the Multi-SpeedCharts link. 

The **Multiple SpeedCharts** page displays in a pop-up window.




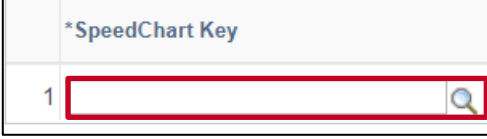


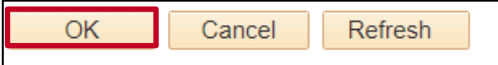
The screenshot shows a pop-up window titled "Multiple SpeedCharts" with a "Help" button in the top right corner. The window displays the following information:

- Business Unit:** 15100
- Voucher ID:** NEXT
- Line Number:** 1
- Distribute By:** Amount
- Invoice Line Amount:** 5,620.50
- Remaining Amount:** 3,620.50

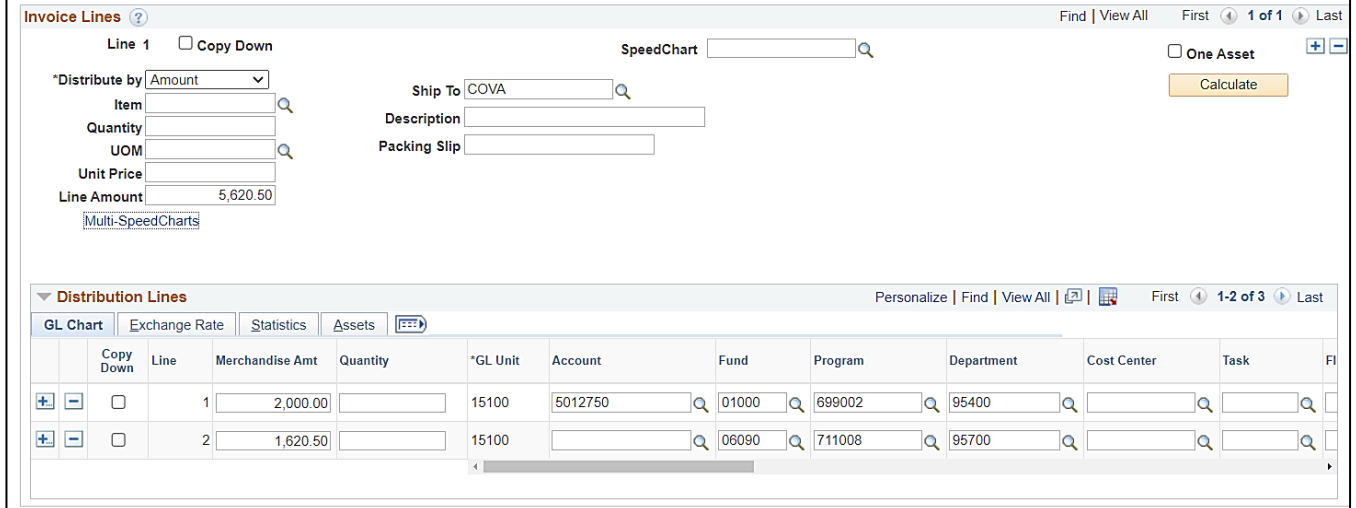
Below this information is a section for "SpeedCharts Process Option" with two radio buttons: "Append" (selected) and "Overwrite".

The next section is "SpeedChart Selections", which includes a toolbar with "Personalize", "Find", "View All", "First", "1 of 1", and "Last" buttons. Below the toolbar is a table with two columns: "*SpeedChart Key" and "Amount to Distribute". The table contains one row with the key "1" and an empty field for the amount. There are "+" and "-" buttons to the right of the table.

At the bottom of the window are three buttons: "OK", "Cancel", and "Refresh".

Step	Action
	In the SpeedCharts Process Option section, the “Append” radio button option defaults as selected. Do not change this.
8.	Enter or select the applicable SpeedChart in the SpeedChart Key field. 
9.	Enter the amount to be charged for the SpeedChart in the Amount to Distribute field. 
10.	Click the Add Row (+) icon to add an additional row. 
11.	Repeats Steps 8 -10 until all SpeedChart and amounts have been entered.
12.	Click the OK button to return to the Invoice Information page. 


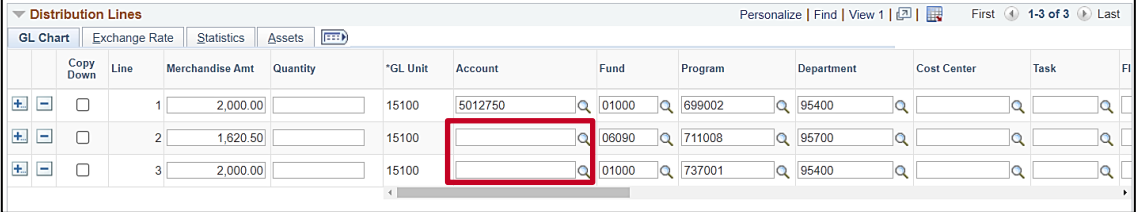

The **Invoice Information** page redisplay.



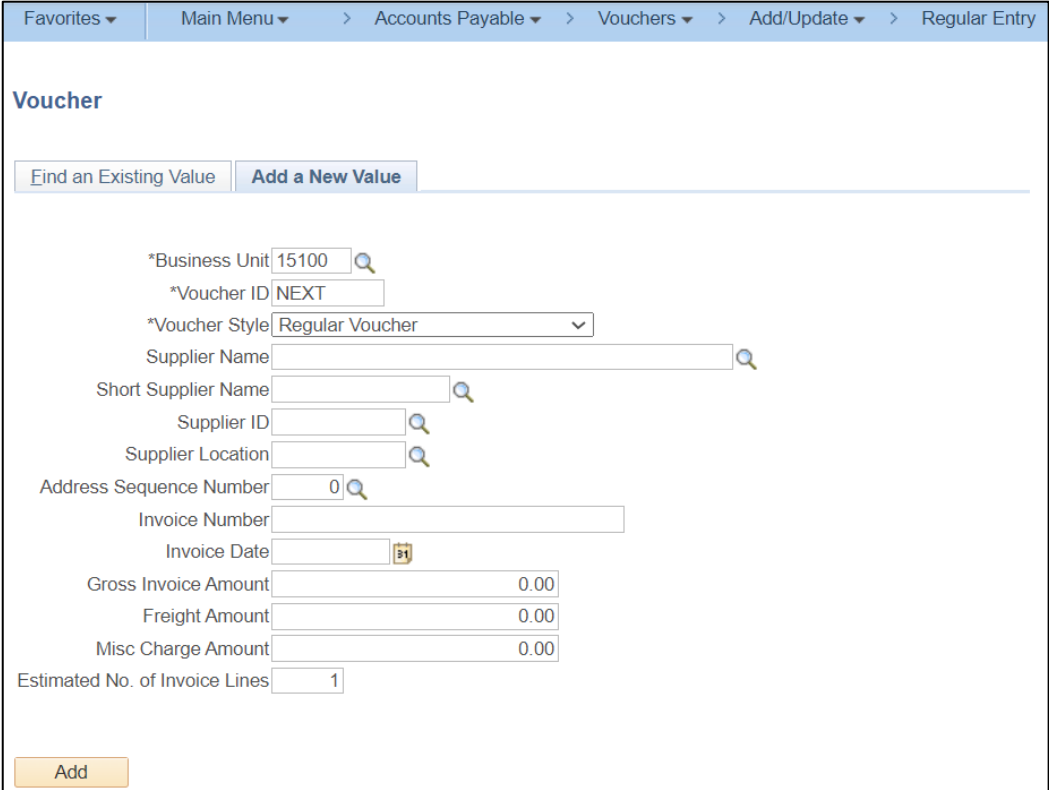

The screenshot shows the 'Invoice Lines' page with the following details:

- Line 1** (Copy Down): *Distribute by: Amount, Line Amount: 5,620.50
- SpeedChart**: [Searchable field]
- Ship To**: COVA
- Description**: [Searchable field]
- Packing Slip**: [Searchable field]
- One Asset**: [Checked]
- Calculate**: [Button]
- Distribution Lines** table:

Copy Down	Line	Merchandise Amt	Quantity	*GL Unit	Account	Fund	Program	Department	Cost Center	Task
<input type="checkbox"/>	1	2,000.00		15100	5012750	01000	699002	95400		
<input type="checkbox"/>	2	1,620.50		15100		06090	711008	95700		

Step	Action
13.	Click the View All link in the Distribution Lines section to view all of the Distribution Lines. 
14.	Enter any additional fields that are required to complete the distribution for the SpeedChart(s) entered. 
15.	Complete any other required fields for the Voucher.
16.	Click the Save button. 

Overwrite (Replace) a SpeedChart Distribution using Multiple SpeedCharts

Step	Action
1.	Navigate to the Voucher page using the following path: Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry
<p>The Voucher page displays with the Add a New Value tab displayed by default.</p> 	
2.	Complete the Voucher page based on the Invoice.
3.	Click the Add button. 



Accounts Payable Job Aid

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Step	Action
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The Invoice Information tab displays.

Favorites > Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry

Invoice Information | Payments | Voucher Attributes

Business Unit 15100 Invoice No 123456
 Voucher ID NEXT Accounting Date 10/11/2024
 Voucher Style Regular Voucher *Pay Terms 30 Net 30
 Invoice Date 10/09/2024 Basis Date Type Prompt Payment
 Invoice Receipt Date
 Goods & Services Receipt Date
 Final Voucher

Invoice Total
 Line Total 5,620.50
 *Currency USD
 Miscellaneous
 Freight
 Total 5,620.50
 Difference 0.00

Non Merchandise Summary
 Session Defaults
 Comments(0)
 Attachments(0)
 Template List
 Advanced Supplier Search
 Supplier Hierarchy
 Supplier 360

IAP Worldwide Services
 Supplier ID 0000044036 Control Group
 ShortName IAP WORLDW-002
 Location MAIN
 *Address 2
 Incomplete Voucher

Responsible Org 10000
 Customer Account #
 ROW Acquisition ID

Save Save For Later Action Run Calculate Print

Copy From Source Document

Invoice Lines Find | View All First 1 of 1 Last
 Copy Down SpeedChart One Asset Calculate

*Distribute by Amount Ship To COVA
 Item Description
 Quantity UOM Packing Slip
 Unit Price
 Line Amount 5,620.50
 Multi-SpeedCharts

Distribution Lines Personalize | Find | View All First 1 of 1 Last

GL Chart	Exchange Rate	Statistics	Assets	FF??										
+	-	<input type="checkbox"/>	1	5,620.50		15100								

Save Save For Later

4.

Enter the appropriate information in the Header section of this page based on the Invoice.

Favorites > Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry

Invoice Information | Payments | Voucher Attributes

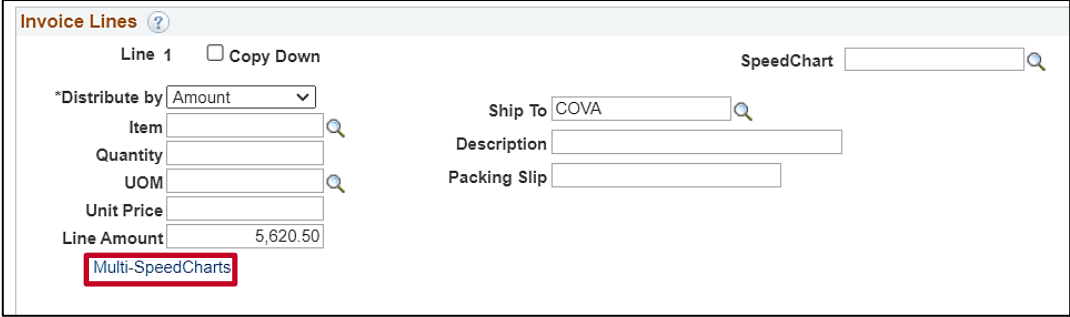
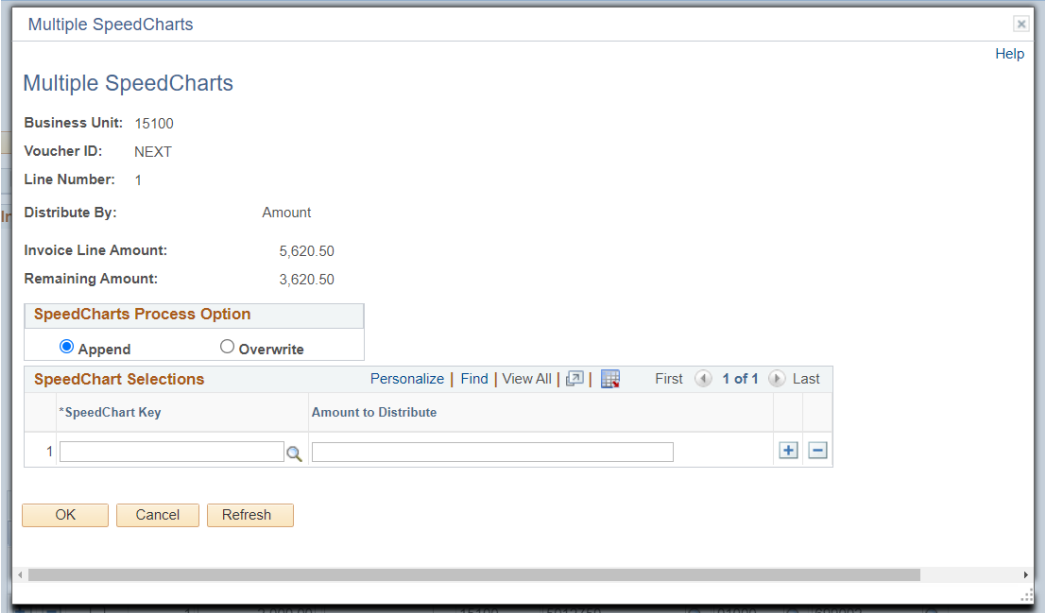
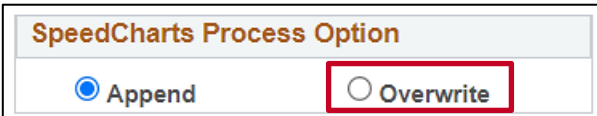
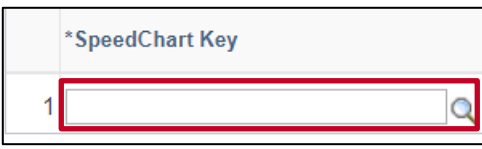
Business Unit 15100 Invoice No 1234567
 Voucher ID NEXT Accounting Date 10/10/2024
 Voucher Style Regular Voucher *Pay Terms 30 Net 30
 Invoice Date 10/01/2024 Basis Date Type Prompt Payment
 Invoice Receipt Date
 Goods & Services Receipt Date
 Final Voucher

Invoice Total
 Line Total 1,526.20
 *Currency USD
 Miscellaneous
 Freight
 Total 1,526.20
 Difference 0.00

Non Merchandise Summary
 Session Defaults
 Comments(0)
 Attachments(0)
 Template List
 Advanced Supplier Search
 Supplier Hierarchy
 Supplier 360

COMPUTER EXCHANGE, INC.
 Supplier ID 0000055032 Control Group
 ShortName COMPUTER-002
 Location MAIN
 *Address 2
 Incomplete Voucher

Responsible Org 10000
 Customer Account #
 ROW Acquisition ID

Step	Action
5.	<p>Click the Multi-SpeedCharts link.</p> 
	<p>The Multiple SpeedCharts page displays in a pop-up window.</p> 
6.	<p>Click the Overwrite radio button option in the SpeedCharts Process Option section.</p> 
7.	<p>Enter or select the SpeedChart in the SpeedChart Key field.</p> 

Step	Action
8.	Enter the amount to be charged for the SpeedChart in the Amount to Distribute field. <div style="border: 1px solid black; padding: 5px; width: fit-content;"> <p style="margin: 0;">Amount to Distribute</p> <div style="border: 2px solid red; height: 20px; width: 100%;"></div> </div>
9.	Click the Add Row (+) icon to add an additional row. <div style="border: 1px solid black; padding: 5px; display: inline-block;"> + - </div>
10.	Repeats Steps 7 - 9 until all SpeedCharts and amounts have been entered.
11.	Click the OK button to return to the Invoice Information page. <div style="border: 1px solid black; padding: 5px; display: flex; gap: 10px;"> OK Cancel Refresh </div>

The **Invoice Information** page redisplay.

Invoice Lines Find | View All | First 1 of 1 | Last

Line 1 Copy Down SpeedChart

*Distribute by: One Asset + -

Item: Ship To:

Quantity: Description:

UOM: Packing Slip:

Unit Price:

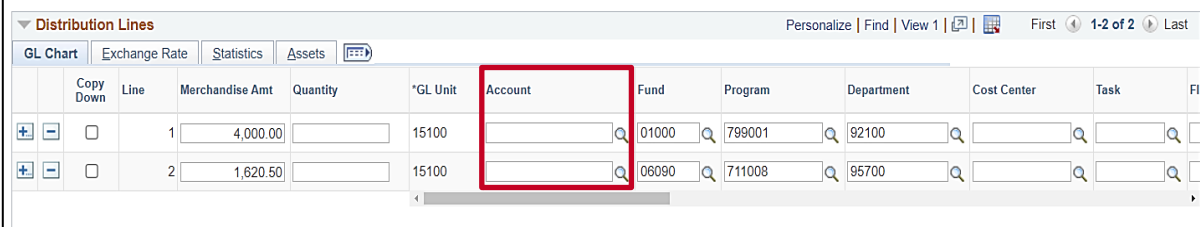
Line Amount: Calculate

[Multi-SpeedCharts](#)

Distribution Lines Personalize | Find | View All | First 1-2 of 3 | Last

GL Chart	Exchange Rate	Statistics	Assets		Line	Merchandise Amt	Quantity	*GL Unit	Account	Fund	Program	Department	Cost Center	Task	FI
+ -	<input type="checkbox"/>				1	2,000.00	<input type="text"/>	15100	5012750	01000	699002	95400	<input type="text"/>	<input type="text"/>	<input type="text"/>
+ -	<input type="checkbox"/>				2	1,620.50	<input type="text"/>	15100	<input type="text"/>	06090	711008	95700	<input type="text"/>	<input type="text"/>	<input type="text"/>

12.	Click the View All link in the Distribution Lines section to view all of the Distribution Lines. <div style="border: 2px solid red; padding: 5px; display: inline-block;">View All</div>
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Step	Action
13.	<p>Enter any additional fields that are required to complete the distribution for the SpeedChart(s) entered.</p> 
14.	Complete any other required fields for the Voucher.
15.	<p>Click the Save button.</p> 