AP312_Using Multiple SpeedCharts on an Invoice Line

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:

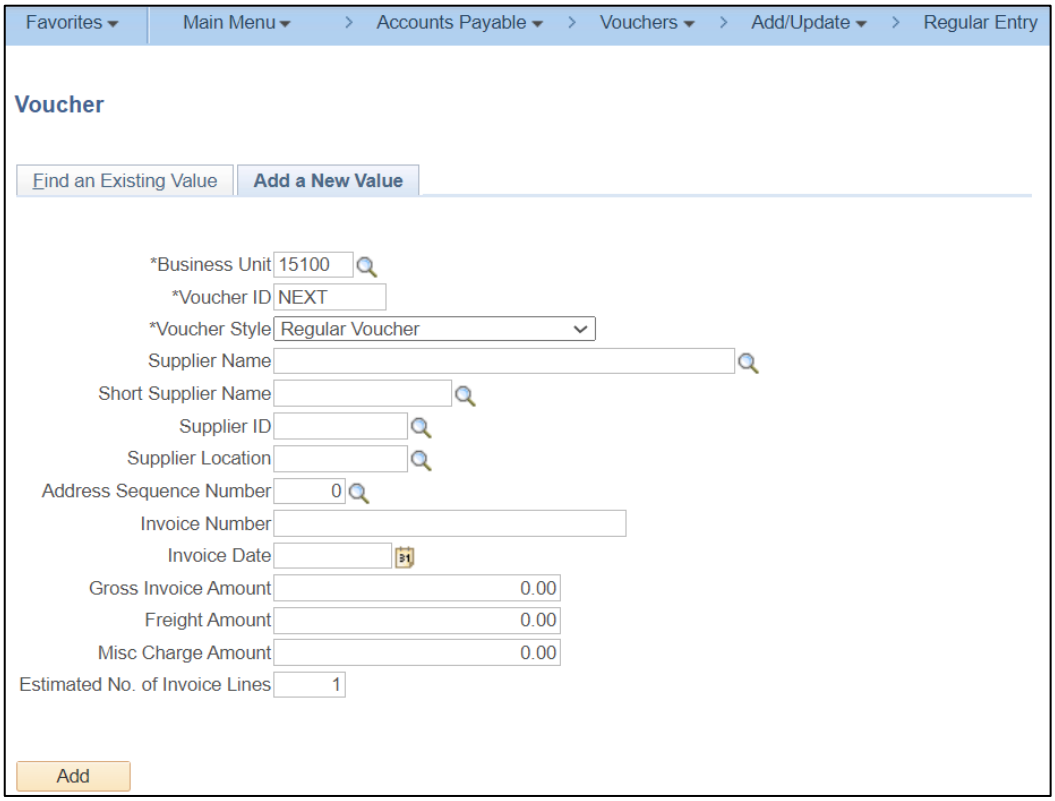
- **Invoice Line Amount**: This field displays the total amount of the Invoice
- **Remaining Amount**: This field is calculated by summing the Merchandise Amounts on the existing Distribution Lines and subtracting that amount from the Invoice Line Amount. This calculation is performed for each Line added 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

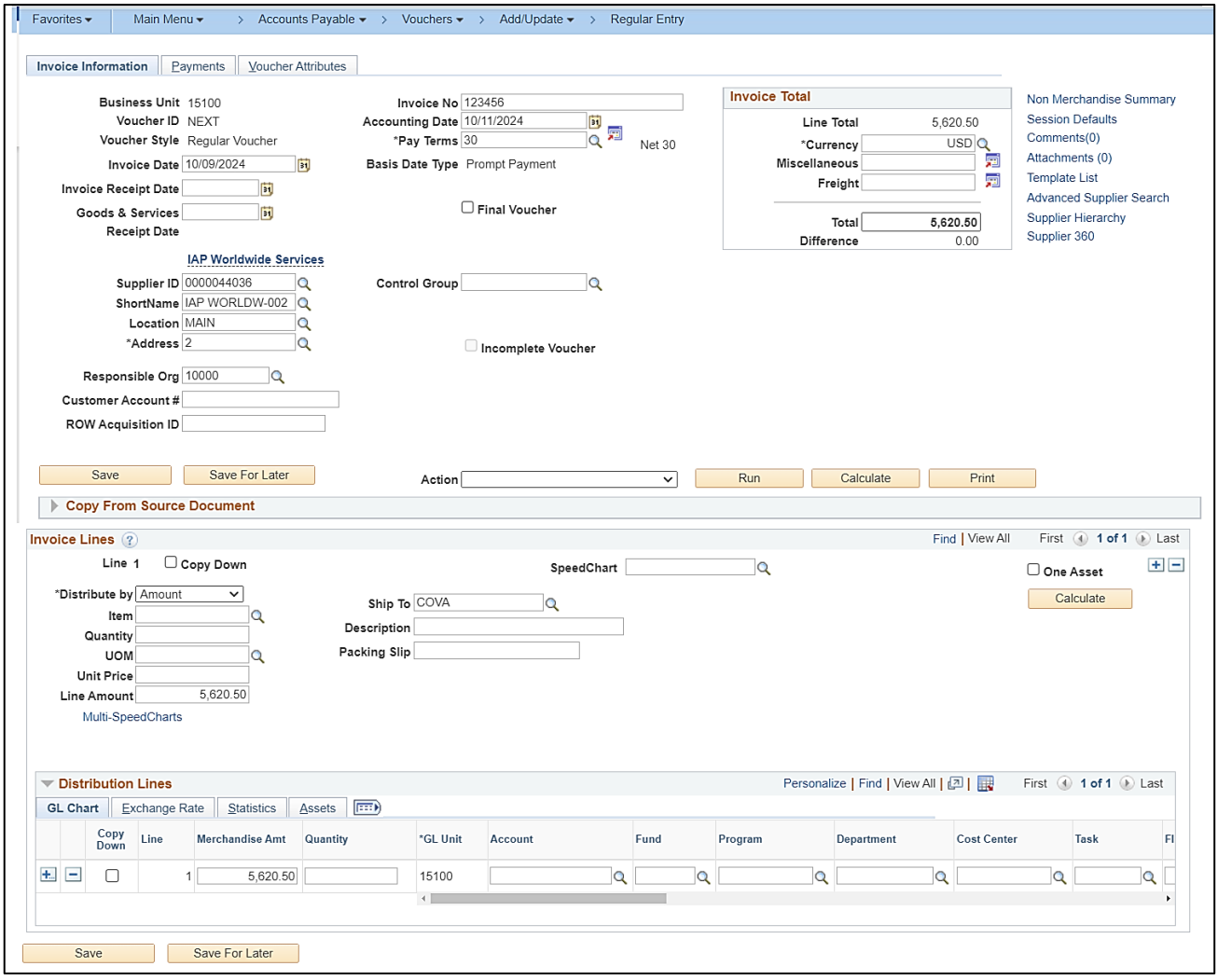
- When “Overwrite” is selected, the sum of the Amount to Distribute for all Lines on the **Multiple SpeedCharts** page cannot exceed the Invoice Line Amount. Users can overwrite existing Distribution Lines with new Lines that total or are equal to, but not greater than, the Invoice Line total

Append (Add) a SpeedChart Distribution using Multiple SpeedCharts

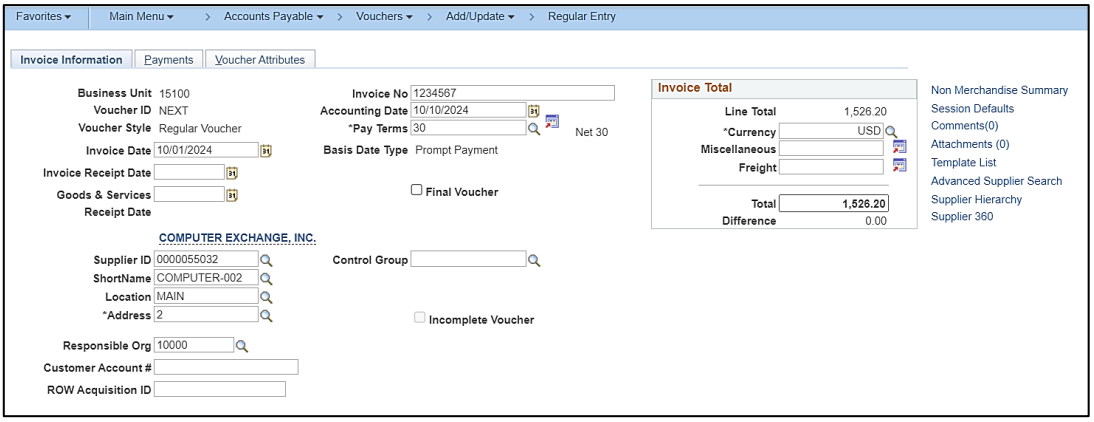
Step	Action
1.	Navigate to the **Voucher** page using the following path: **Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry**
The **Voucher** page displays with the **Add a New Value** tab displayed by default. 	
2.	Complete the **Voucher** page based on the Invoice.
3.	Click the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

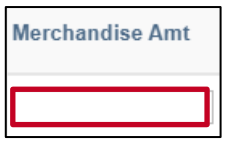
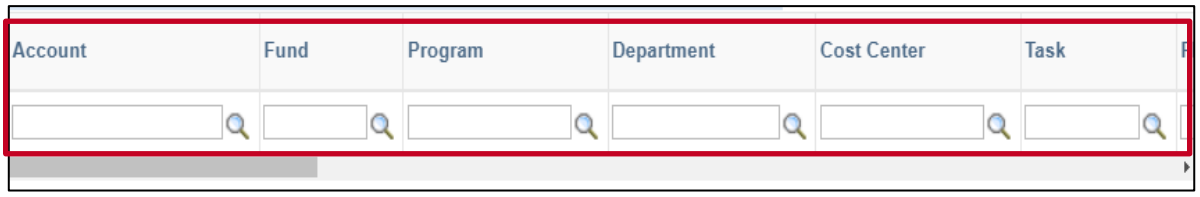
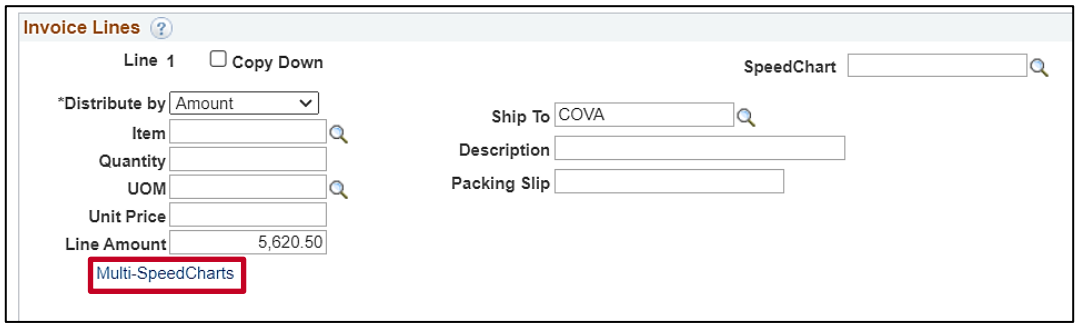
Step	Action

The **Invoice Information** page displays.

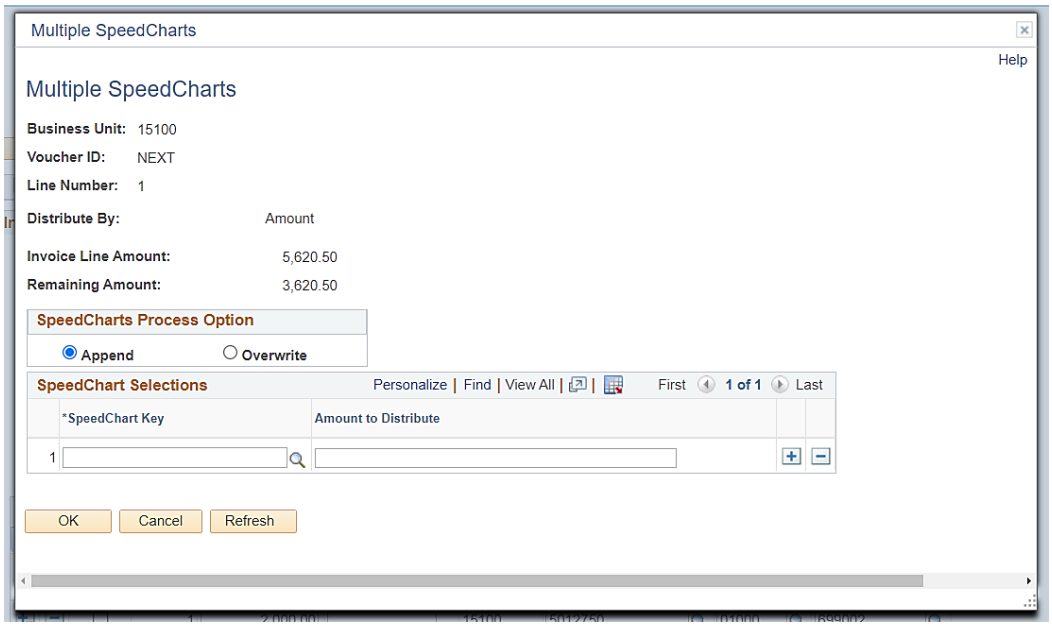


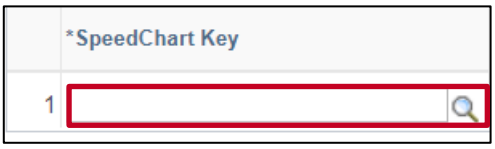
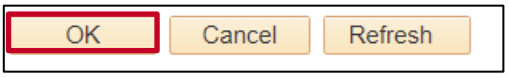
4. Enter the appropriate information in the **Header** section of this page based on the Invoice.



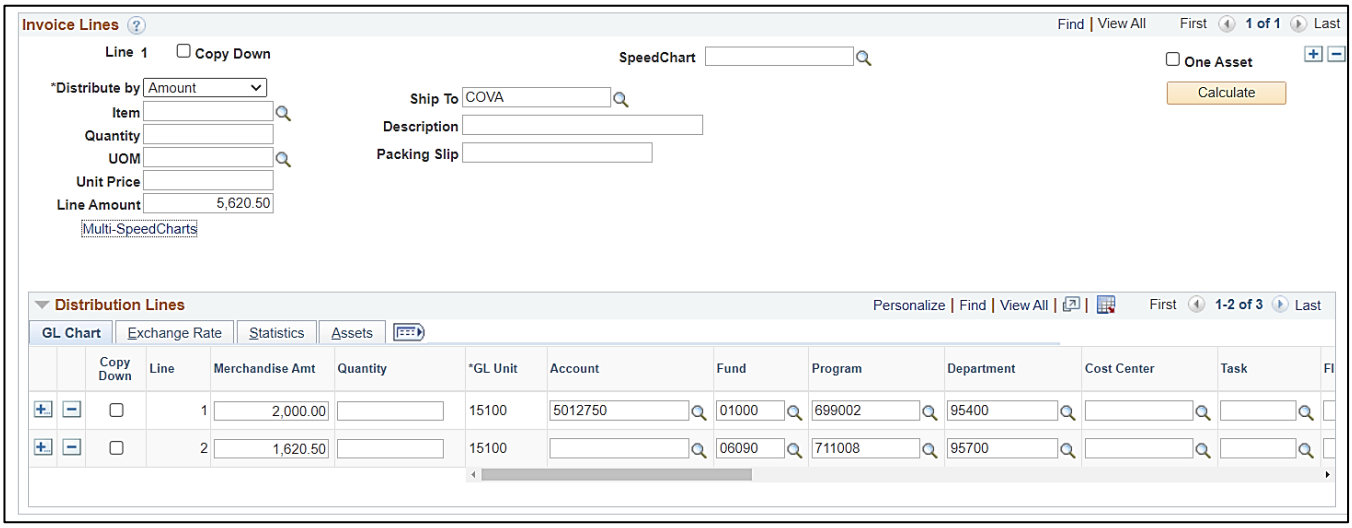
Step	Action
5.	Enter the amount being charged to the specific distribution in the **Merchandise Amt** field. 
6.	Enter the charge distribution information in the **Distribution** section as appropriate. 
7.	Click the **Multi-SpeedCharts** link. 

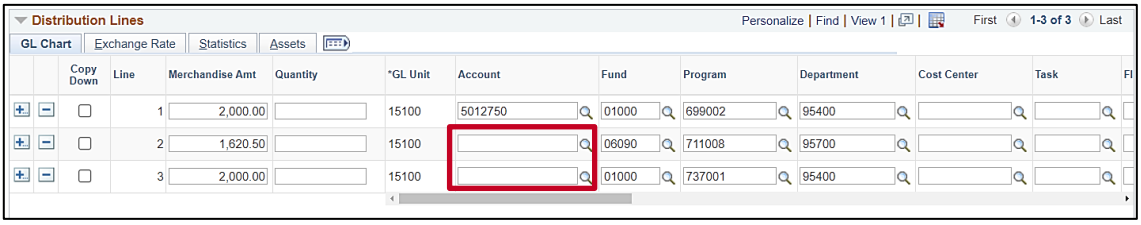
The **Multiple SpeedCharts** page displays in a pop-up window.



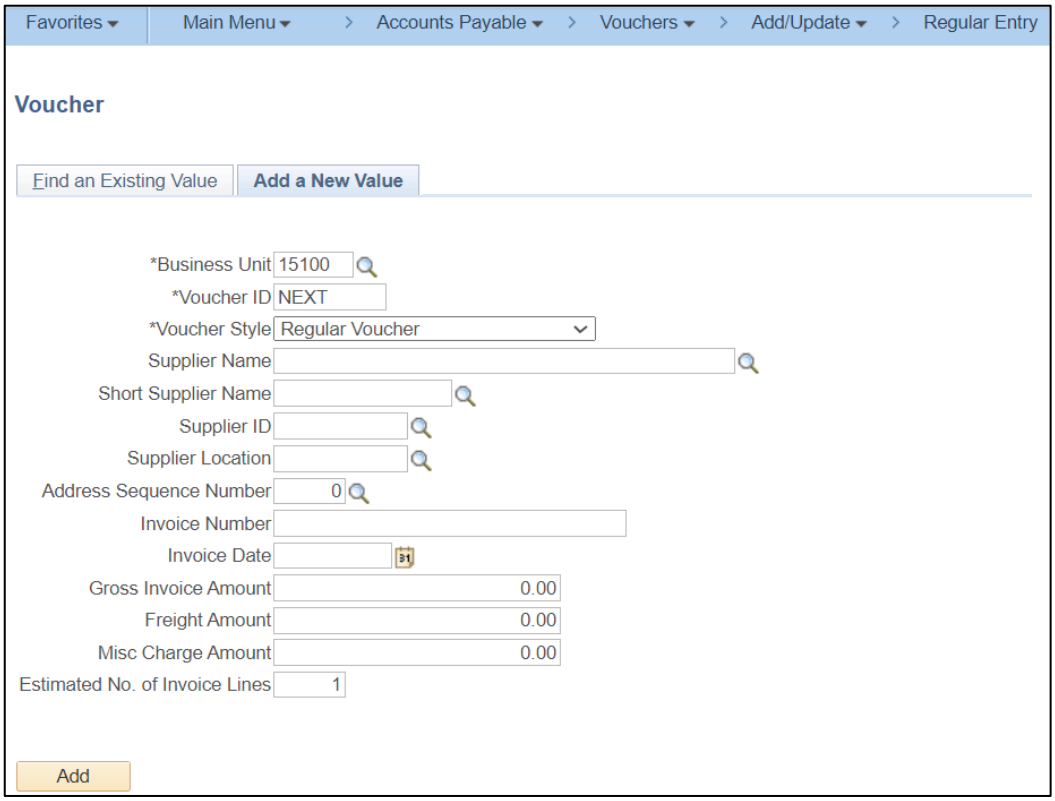
Step	Action
	In the **SpeedCharts Process Option** section, the “Append” radio button option defaults as selected. Do not change this.
8.	Enter or select the applicable SpeedChart in the **SpeedChart Key** field. 
9.	Enter the amount to be charged for the SpeedChart in the **Amount to Distribute** field.
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 redisplays.



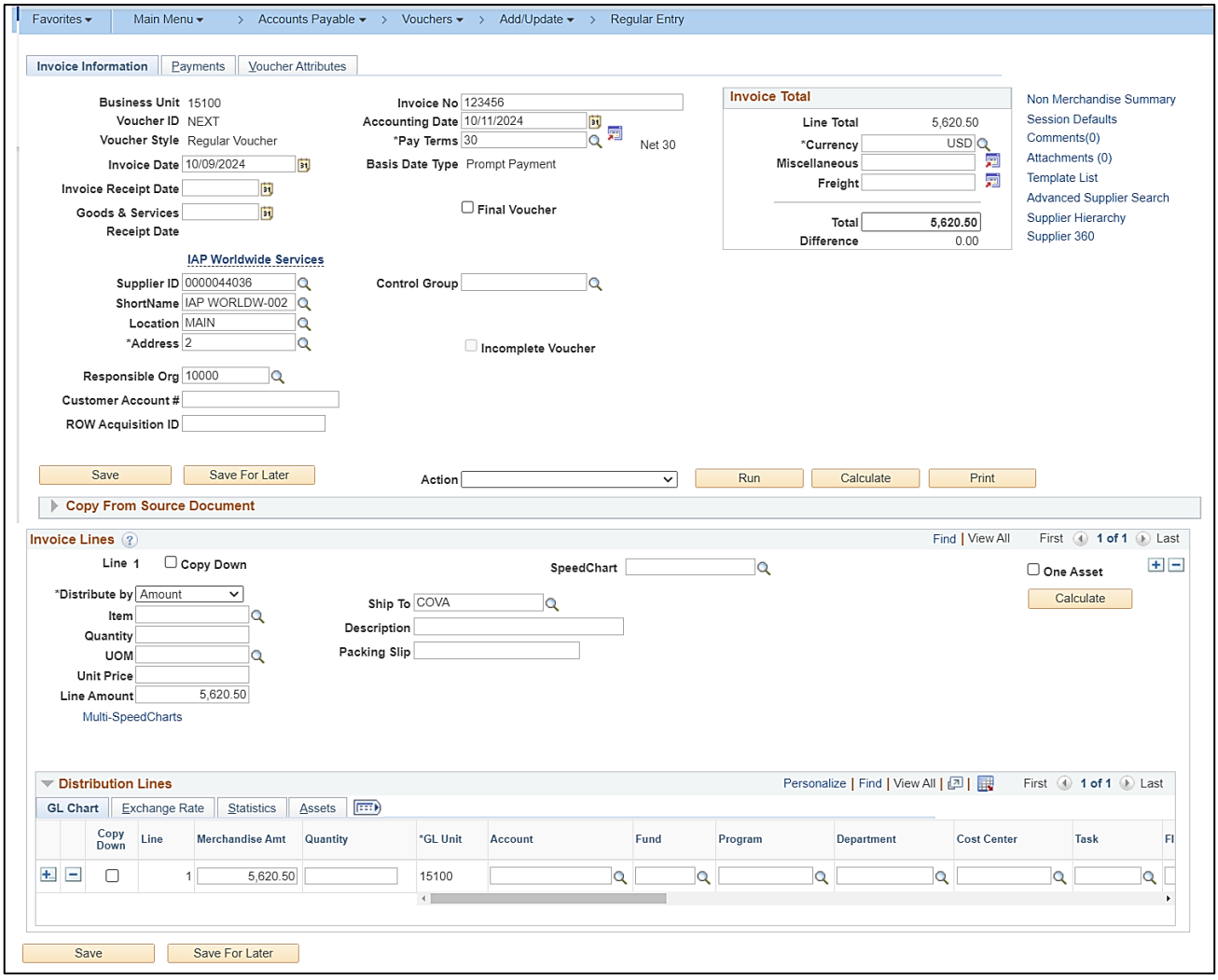
Step	Action
13.	Click the **View All** link in the **Distribution Lines** section to view all of the Distribution Lines.
14.	Enter any additional fields that are required to complete the distribution for the SpeedChart(s) entered. 
15.	Complete any other required fields for the Voucher.
16.	Click the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

Overwrite (Replace) a SpeedChart Distribution using Multiple SpeedCharts

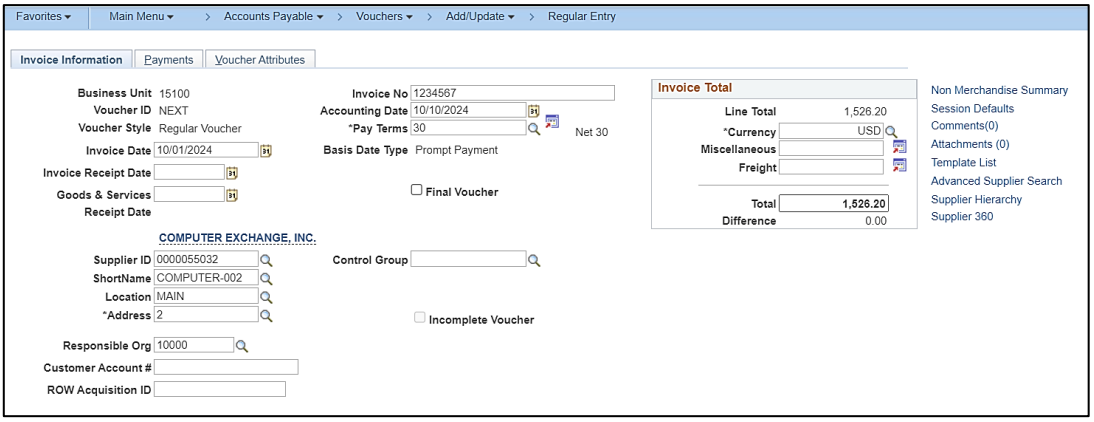
Step	Action
1.	Navigate to the **Voucher** page using the following path: **Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry**
The **Voucher** page displays with the **Add a New Value** tab displayed by default. 	
2.	Complete the **Voucher** page based on the Invoice.
3.	Click the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

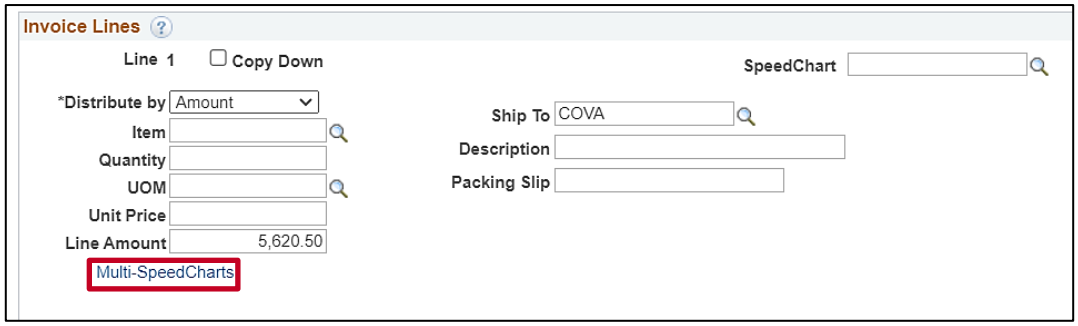
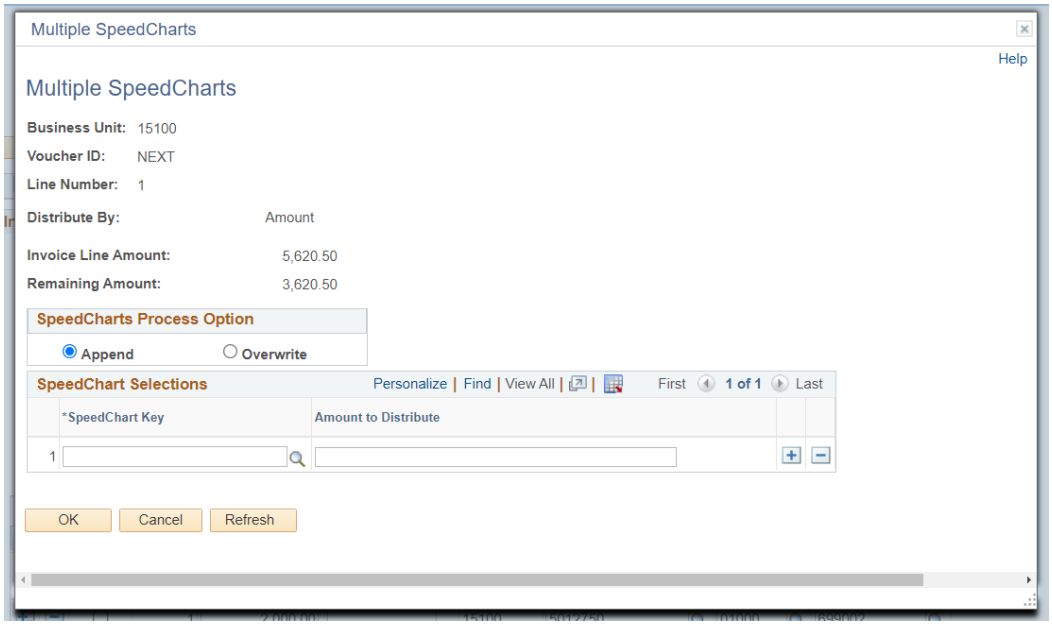
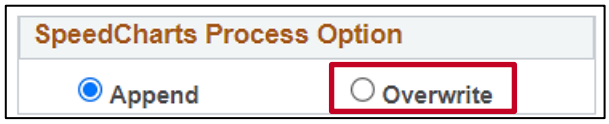
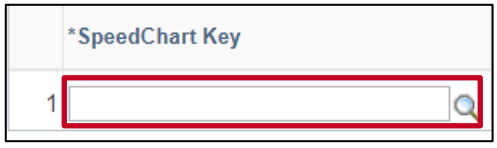
Step	Action

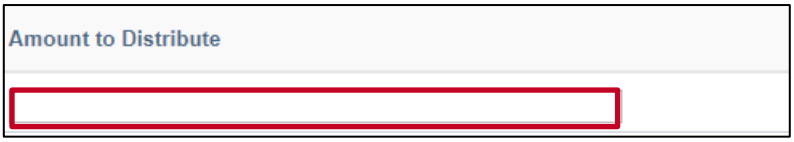
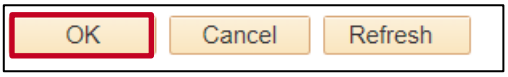
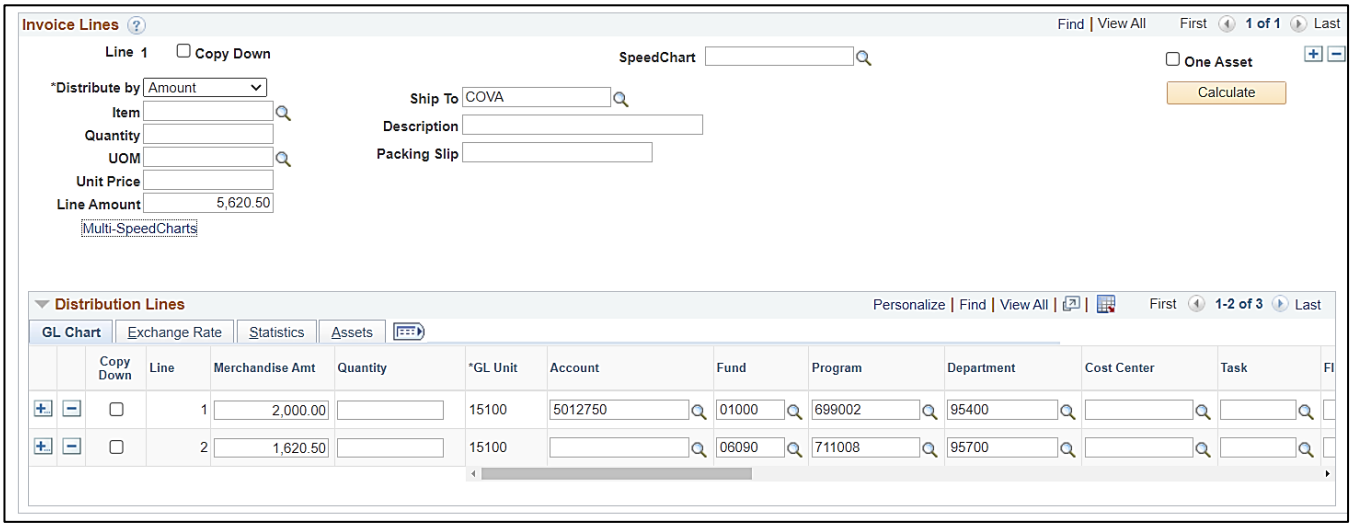
The **Invoice Information** tab displays.

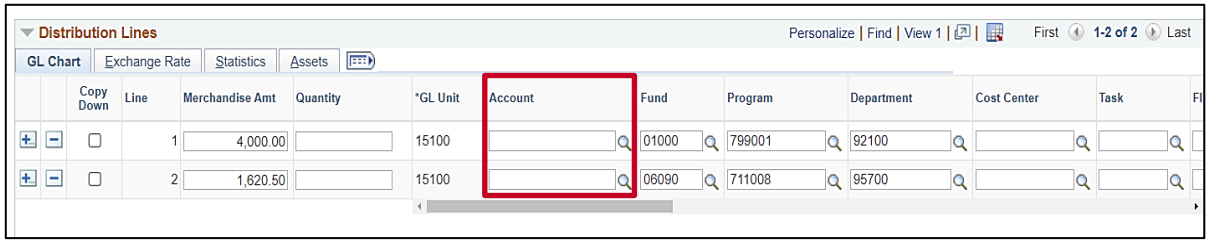


4. Enter the appropriate information in the **Header** section of this page based on the Invoice.



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

Step	Action
8.	Enter the amount to be charged for the SpeedChart in the **Amount to Distribute** field. 
9.	Click the **Add Row (+)** icon to add an additional row.
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. 
The **Invoice Information** page redisplays. 	
12.	Click the **View All** link in the Distribution Lines section to view all of the Distribution Lines.

Step	Action
13.	Enter any additional fields that are required to complete the distribution for the SpeedChart(s) entered. 
14.	Complete any other required fields for the Voucher.
15.	Click the **Save** button.