About Using Multiple Speeedcharts on an Invoice Line

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, you can split the cost of a supplier's goods / services between two or more departments, cost centers, etc. You can add new distribution line(s) or overwrite existing distribution line(s) using SpeedCharts.

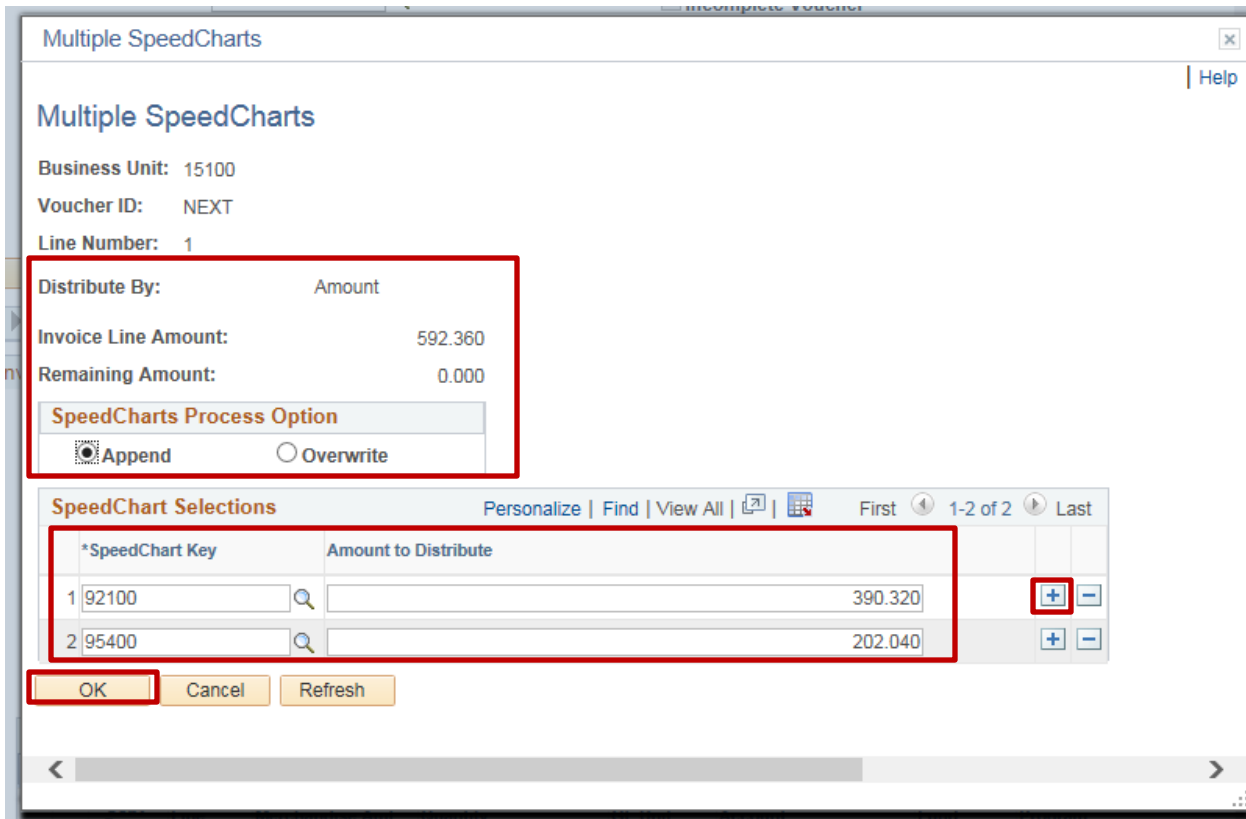## TABLE OF CONTENTS

Adding Multiple SpeedCharts

1   Navigate to the **Invoice Information** page using the following path:

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

2   Open an existing voucher or create a new voucher.

3   The above screenshot depicts the Voucher Entry – **Invoice Information** page.

4   On the invoice line, there is a **Multi-SpeedCharts** link below the **Line Amount** field.

5   Click the **Multi-SpeedCharts** link.

6 The **Multiple SpeedCharts** page displays. The three key fields are **Invoice Line Amount**, **Remaining Amount**, and **Amount to Distribute**.

The **Remaining Amount** 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.

7 If **Append** is selected as the **SpeedCharts Process Option**, 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**), you <u>must</u> adjust the amounts of the distribution lines on the **Invoice Information** page prior to adding new lines via the **Multiple SpeedCharts** page.

8 If **Overwrite** is selected as the **SpeedCharts Process Option**, the sum of the **Amount to Distribute** for all lines on the **Multiple SpeedCharts** page cannot exceed the **Invoice Line Amount**. You can Overwrite existing distribution lines with new lines that total or are equal to, but not greater than, the **Invoice Line** total.

To Append (Add) a SpeedChart distribution using Multiple SpeedCharts

Under **SpeedChart Process Option** choose **Append** to add distribution lines using SpeedCharts to an existing voucher line or create multiple distribution lines using SpeedCharts on a new voucher.

1   In the **SpeedCharts Process Option** section of the page, select the **Append** option.

2   In the **SpeedChart Key** field, enter the SpeedChart value desired for the additional distribution line. The lookup icon can be used to search for existing SpeedCharts.

3   In the **Amount to Distribute** field, enter in the desired amount for the additional distribution line.

4   If needed, click on the **+** icon to add additional distribution lines.

      If the **Remaining Amount** field displays **0.00**, no additional lines can be added. In order to add new SpeedChart lines, you will need to navigate back to the **Invoice Information** page and reduce the amounts on the existing **Distribution Lines** prior to using the **Multiple SpeedCharts** page.

5   Once completed, click **OK** to redisplay the **Invoice Information** page. The additional SpeedChart distribution(s) have now been added to existing **Distribution Line(s)** on the Invoice Line.

6   Enter any additional fields that are required to complete the distribution for the SpeedChart you entered. For example, the SpeedChart may be missing Account.

7   Complete any other required fields to complete your voucher. Click the **Save** button.

To Overwrite (Replace) a SpeedChart distribution using Multiple SpeedCharts

Under **SpeedChart Process Option** choose **Overwrite** to replace distribution lines using SpeedCharts to an existing voucher line.

1   In the **SpeedChart*s* Process Option** section of the page, select the **Overwrite** option. All previously entered distributions for this line will be removed and replaced with the newly entered SpeedCharts.

2   In the **SpeedChart Key** field, enter the SpeedChart value desired for the new distribution line. The lookup icon can be used to search for existing SpeedCharts.

3   In the **Amount to Distribute** field, enter in the desired amount for the new distribution line.

4   If needed, click on the **+** icon to add additional distribution lines.

      The sum of the lines on the **Multiple SpeedCharts** page cannot exceed the **Invoice Line Amount** when in Overwrite mode.

5   Once completed, click **OK** to redisplay the **Invoice Information** page. The previous distribution line(s) have now been replaced by the SpeedChart distribution(s) entered on the **Multiple SpeedCharts** page.

6   Enter any additional fields that are required to complete the distribution for the SpeedChart you entered. For example, the SpeedChart may be missing the **Account**.

7   Complete any other required fields to complete your voucher.

8   Click the **Save** button.