

Items/Funding Tab

The **Items/Funding tab** has three sections: *UNSPSC*, *Item Information* and *Requisition Funding Lines*. The *UNSPSC* section searches for a code that NYS issues for any item purchased. The *Item Information* section describes (in detail) the item you are purchasing, the quantity of the item and the price. The *Requisition Funding Lines* section is where the account and dollar amount is input.

The screenshot shows a software interface with a header bar containing tabs: "Header", "Items/Funding" (selected), "Vendor", and "Summary". Below the header is a blue notification bar that says "Saved Header Successfully".

The main content area is divided into two sections:

- UNSPSC Search:** This section contains two input fields. The first is labeled "UNSPSC Code or UNSPSC Description:" and is highlighted with a black box. Below it is a smaller field labeled "Sub-Object Code:". A "Search" button with a magnifying glass icon is also highlighted with a black box.
- UNSPSC Search Results:** This section shows a table with the following structure:
 - Header: "(1 of 1)" followed by navigation icons and a dropdown menu set to "10".
 - Table Headers: "Unspsc Title" and "Unspsc Code", both with dropdown arrows.
 - Table Body: A single row containing the text "No records found."
 - Footer: "(1 of 1)" followed by navigation icons and a dropdown menu set to "10".A "Select" button with a checkmark icon is located at the bottom of the results section.

1. On the **Items/Funding** tab, under **UNSPSC Search**:
 - a. A UNSPSC code identifying each item must be assigned to the requisition.
 - a. If you know the UNSPSC code for the item you are purchasing, you can directly input the number into the **UNSPSC Code or UNSPSC Description** field and then click on **Search**.
 - b. If you do *not* know the UNSPSC code to use, type in what you are purchasing in the **UNSPSC Code or UNSPSC Description** field, and then click **Search**.
2. **Scroll** down the page to **UNSPSC Search Results** to view your results.

Note: You may have to search through several pages to find what you are looking for. Many items in the system use different verbiage than how you would describe the item that you are purchasing. You may have to try a few different words to come up with what you are looking for. Use whatever item *best* describes what you are purchasing; it does not have to be an exact match.

UNSPSC Search Results

(4 of 6) [Navigation: 1 2 3 4 5 6 10]

Unspsc Title	Unspsc Code
<input type="radio"/> Sports equipment and accessories	49220000
<input type="radio"/> Judging chair or stand	49221514
<input type="radio"/> Domestic Appliances and Supplies and Consumer Electronic Products	52000000
<input type="radio"/> Floor coverings	52100000
<input type="radio"/> Chair mat	52101512
<input type="radio"/> Bedclothes and table and kitchen linen and towels	52120000
<input type="radio"/> Chair cover	52121514
<input type="radio"/> Furniture and Furnishings	56000000
<input type="radio"/> Accommodation furniture	56100000
<input checked="" type="radio"/> Chairs	56101504

(4 of 6) [Navigation: 1 2 3 4 5 6 10]

[Select]

- When you find the item or closest match, click the radio button of the UNSPSC title.
- Click **Select**.
- Scroll down the page to **Item Information**.

Item Information

UNSPSC: 56101504 - Chairs
 Commodity Code: 20915-00

P Contracts:

* Item Description:

* Quantity: * Units: Conversion Factor:

* Price: Amount:

Discount: -OR-

Discount Notes:

Net Amount:

Receiving Comment:

- Under **Item Information**, in the **Item Description** field, delete the default words and type a *very detailed description* of the item you are ordering. Be very descriptive as Purchasing creates the purchase order from this field. If the item you are purchasing is under contract, be sure to include the *P Contract Number* here. If you are using a quote to order the item, type in the entire description from the quote.

Note: to go from field to field: press tab on your keyboard or click in the field.
- Enter the **Quantity**, or the number of items you are purchasing.
- Leave the **Units** and **Conversion Factor** fields blank.
- Enter **Price** and press tab or click outside the field. The system will update the **Amount** and **Net Amount**.
- If there are **discounts**, type in the percentage or dollar amount of the discount.
- Receiving Comment** field is optional.
- Scroll down to **Requisition Funding Lines**.

13. Click on **Add Funding**.

14. A new window will appear. Enter the **Account Number** you wish to use. The account number will populate as you type. Choose the account number you want.
15. If the **Sub Object Code** is incorrect, click the pull-down and change it. If you do not know the Sub Object Code, use the default code.
16. **Fiscal Year**: automatically populates – leave default.
17. **Amount**: make sure the amount is correct and matches the amount in *Item Information*.
18. Click either:
 - a. **Save/Add Next Account**: saves and allows you to add another funding account. Use this to split the dollar amount into more than one account.
Ex: total amount = \$50 – split \$30 from one account and \$20 from another. Make sure the dollar amounts equal the total amount.
 - b. **Save and Return**: saves and returns to the previous screen.

Requisition Funding Lines

(1 of 1) 1 10

Account	Sub Object	Percentage	Fiscal Year	Encumbrance	Balance
8601234567	572220	100.00%	20xx	\$335.49	\$335.49

Total Currently Encumbered: \$335.49

(1 of 1) 1 10

+ Add Funding ↑ Update Funding

Save + Add Item

19. Under **Requisition Funding Lines**, review the information to ensure accuracy.

20. Click **Save**.

Note:

- Once you click *Save*, you will encumber the dollar amount.
- To add more items, click in the **Items/Funding** tab at the top of the page.

Header Items/Funding **Vendor** Summary

Summary

Saved Items Successfully

Header Information

Req Number:	021353
Last Updated:	08/28/2015
Updated By:	JSUNY
Req Status:	Incomplete
Requestor:	Joe Suny
Budget Requisition:	No
Comments:	New chair for Director
Encumbrance Total:	\$335.49
Outstanding Amount:	\$335.49
Vouchered Amount:	\$0.00

21. Once you clicked **Save**, by default, you will be brought to the **Summary** tab. You need to **add a vendor** by clicking on the **Vendor** tab at the top of the page.