UPDATE BUILDING BILLING ALLOCATION

Provides guidance for updating the chartstring information on a building record. The building billing information would only need to be changed at the request of a school or department.

DIRECTIONS:

1. From the Facilities Connect Home Screen,
   
   1. Click on the Portfolio section.

2. Locate the Locations section,
   
   2. Click on the Buildings option.
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DIRECTIONS:

3 From the Buildings list,

   Use the columns to search for the desired location.

4 Once you have located the correct Building,

   Click on the Building Record line.
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DIRECTIONS:

5 Upon clicking, the Building Record will open in a new window.

5 Click on the Revise button.

6 Once the record is in Revision in Progress mode,

6 Click on the Maintenance tab.
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DIRECTIONS:

7 On the Maintenance tab,

7 Locate the Building Billing Allocation section.

To remove the existing Chartstring,

8a Click on the checkbox in front of the existing Chartstring.

8b Click the Remove button.
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DIRECTIONS:

9 To add the new Chartstring,

   Click on the Add button.

Upon clicking, the Chartstring search box will open.

10a Use the columns to search for the desired Chartstring.
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DIRECTIONS:

11 Once you have located the new Chartstring,

11a Click the checkbox to the left of the desired new Chartstring.

11b Click OK to save.

The new chartstring will now appear in the Building Billing Allocation section:
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DIRECTIONS:

13a To save the changes to the Building Record,
   Click the **Save button**.

13b Click the **Activate button**.

The building charges can be split between multiple Building Billing Allocations and the total **Allocated Percent** needs to sum to be 100%.

The most efficient way to achieve this, is to reduce the percentage on the first chartstring added and click save before adding a 2nd billing allocation chartstring.

**IMPORTANT**

Only once the Building Record has been Activated, will the new Account Codes be added to the Chartstring. If you are trying to update or run a Job Cost report and are not seeing the new Account Codes, please confirm that you have Activated the Building Record.

**INFORMATION**

The building charges can be split between multiple Building Billing Allocations and the total **Allocated Percent** needs to sum to be 100%.

The most efficient way to achieve this, is to reduce the percentage on the first chartstring added and click save before adding a 2nd billing allocation chartstring.