

SPLIT BUILDING BILLING ALLOCATION

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

▼ GETTING STARTED

This guide focuses on splitting a building billing allocation into several chartstrings. For the full walkthrough of the process, please see the **Update Building Billing Allocation** guide.

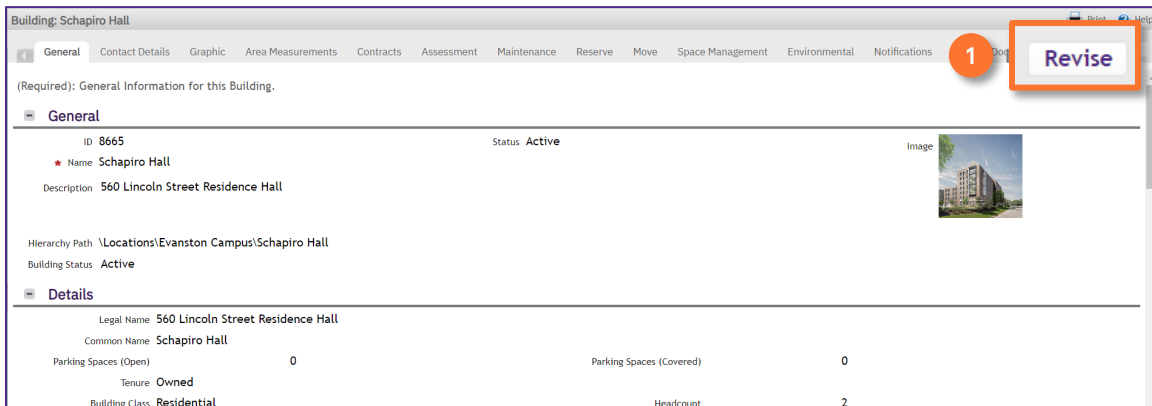
▼ IMPORTANT

Before updating the Building Billing Allocation information, submit a service ticket with NUIT or reach out to the Facilities Connect Product Team.

DIRECTIONS:

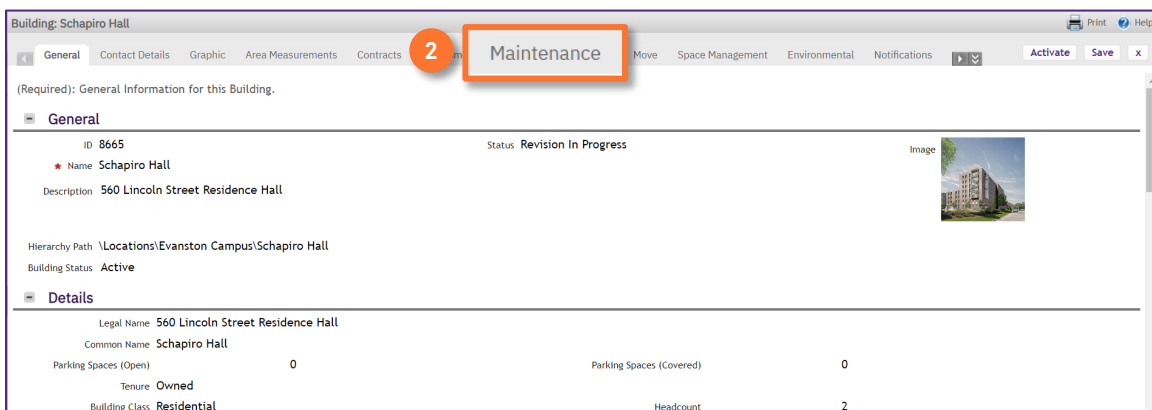
1 Once you locate the **Building Record** you wish to update,

1 Click on the **Revise** button.



2 Once the record is in **Revision in Progress** mode,

2 Click on the **Maintenance** tab.

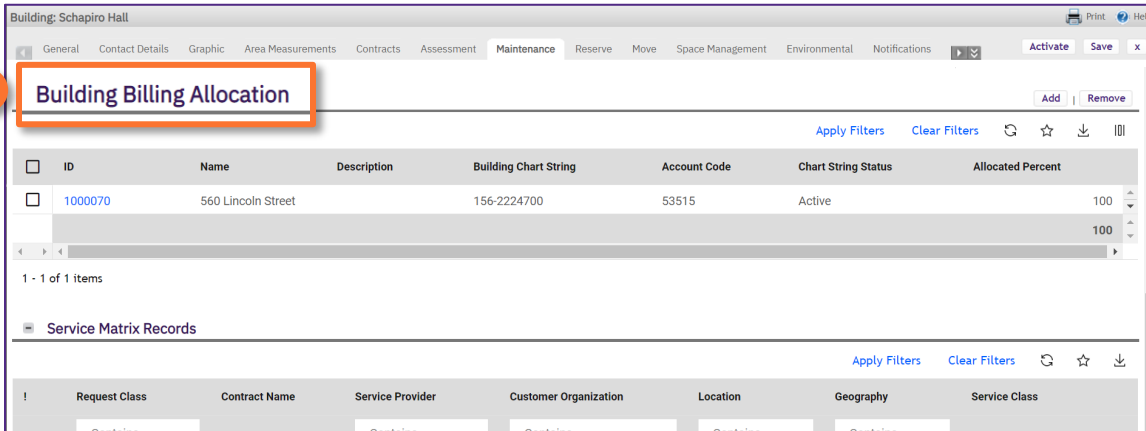




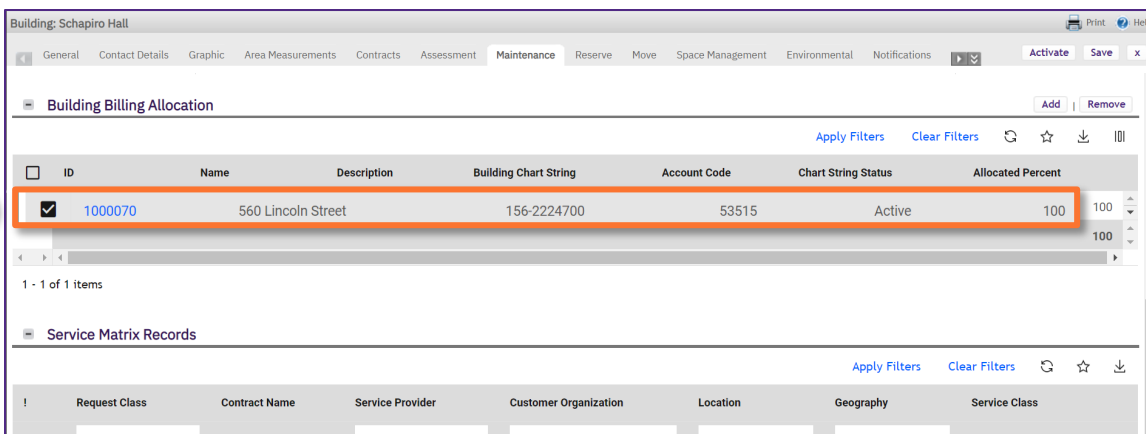
SPLIT BUILDING BILLING ALLOCATION

DIRECTIONS:

- 3 On the **Maintenance** tab,
- 3 Locate the **Building Billing Allocation** section.



- 4 To edit the existing Chartstring,
- 4 Click on the line item of the existing Chartstring.



SPLIT BUILDING BILLING ALLOCATION

DIRECTIONS:

5 Upon clicking, the **Chartstring** record will open,

5a Locate the **Allocation Percent** section.

Building Billing Allocation: 1000070

General System Workflow Instance Associations Save Save & Close More x

(General): Required

General

ID 1000070 Status Active

* Name 560 Lincoln Street Description

* Building Chart String 156-2224750 Chart String Status Active

* Allocation Percent 100 * Building Charge Revenue Account Code 53515

Save Save & Close more x

5b Lower the Allocation Percent to the updated number.

Building Billing Allocation: 1000070

General System Workflow Instance Associations Save Save & Close More x

(General): Required

General

ID 1000070 Status Active

* Name 560 Lincoln Street Description

* Building Chart String 156-2224750 Chart String Status Active

* Allocation Percent 50 * Building Charge Revenue Account Code 53515

Save Save & Close more x

5c Click **Save and Close** to save the new Allocation Percent.

Building Billing Allocation: 1000070

General System Workflow Instance Associations Save Save & Close More x

(General): Required

General

ID 1000070 Status Active

* Name 560 Lincoln Street Description

* Building Chart String 156-2224750 Chart String Status Active

* Allocation Percent 50 * Building Charge Revenue Account Code 53515

Save Save & Close more x

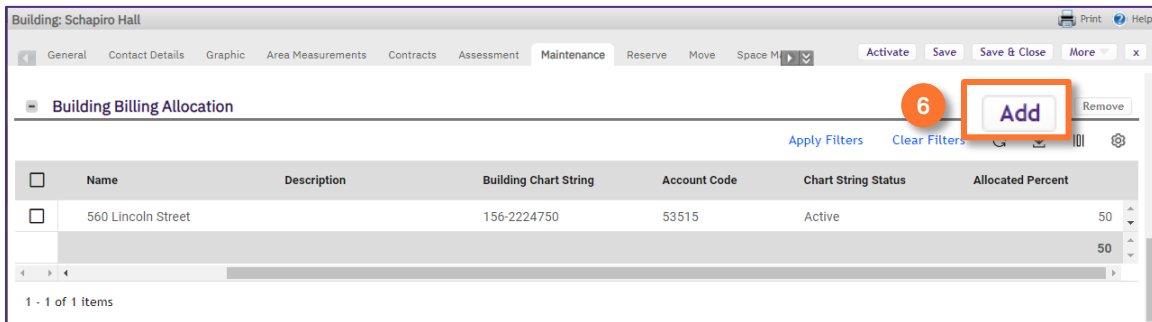
SPLIT BUILDING BILLING ALLOCATION

DIRECTIONS:

6 Once the original Chartstring is updated, **add** the new Chartstring.

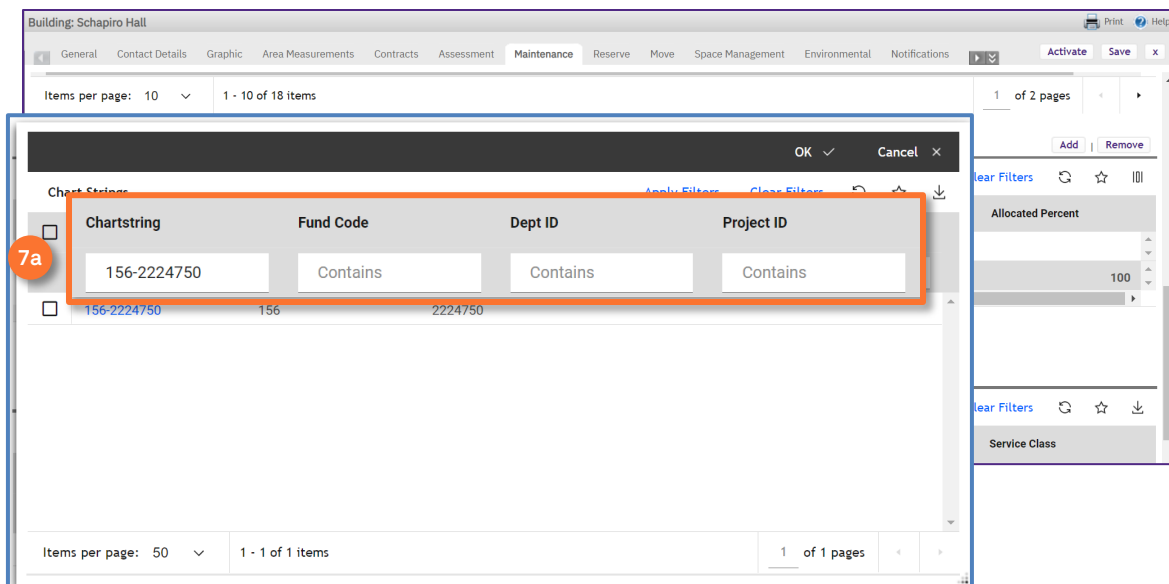
From the Maintenance tab,

6 Click on the **Add** button.



7 Upon clicking, the Chartstring search box will open.

7a Use the **columns** to search for the desired Chartstring.



SPLIT BUILDING BILLING ALLOCATION

DIRECTIONS:

8 Once you have located the new Chartstring,

8a Click the **checkbox** to the left of the desired new Chartstring.

8b Click **OK** to save.

Building: Schapiro Hall

Items per page: 10 | 1 - 10 of 18 items

Chart Strings

Chartstring	Fund Code	Dept ID	Project ID	Activity ID
<input type="checkbox"/> 156-2224750	Contains	Contains	Contains	Contains
<input checked="" type="checkbox"/> 156-2224750	156		2224750	

Items per page: 50 | 1 - 1 of 1 items

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

Building: Schapiro Hall

Building Billing Allocation

Name	Description	Building Chart String	Account Code	Chart String Status	Allocated Percent
Contains	Contains	Contains	Contains	Contains	Equals
560 Lincoln Street		156-2224750	53515	Active	50
		156-2224750	53515	Active	0

1 - 2 of 2 items

SPLIT BUILDING BILLING ALLOCATION

DIRECTIONS:

10 To edit the newly added Chartstring,

10 Click on the line item of the new Chartstring.

Complete steps 5a-5c to update.

Building: Schapiro Hall

Building Billing Allocation

Name	Description	Building Chart String	Account Code	Chart String Status	Allocated Percent
Contains	Contains	Contains	Contains	Contains	Equals
560 Lincoln Street		156-2224750	53515	Active	50
156-2224750		156-2224750	53515	Active	0

1 - 2 of 2 items

11 The new Chartstring allocations will now appear.

Building: Schapiro Hall

Building Billing Allocation

Name	Description	Building Chart String	Account Code	Chart String Status	Allocated Percent
Contains	Contains	Contains	Contains	Contains	Equals
560 Lincoln Street		156-2224750	53515	Active	50
156-2224750		156-2224750	53515	Active	50
					100

1 - 2 of 2 items

SPLIT BUILDING BILLING ALLOCATION

DIRECTIONS:

▼ IMPORTANT

The percentage splits will only change if the Chartstring on Work Task matches the building billing allocation chartstring. The splits that are not updated are due to a mismatch with the chartstring on the work task and the building allocation chartstring.

To ensure that all Work Tasks are updating properly, review the **Work Tasks – With WTBA** queue in the Tasks section of the Maintenance Tab.

Building: Schapiro Hall

General Contact Details Graphic Area Measurements Contracts Assessment Maintenance Reserve Move Space Management Environmental Notification

(Optional): Maintenance information for this building.

Maintenance Details

Maintenance Priority

Geography Cost Index

Name

Cost Item Source Index 0

PM Schedules Safety Plans (Procedures) Building Systems Readings Warranties Projects Tasks Checklists Meter Service Allocations Transaction Log Available Services

Tasks

Work Tasks - All

Apply Filters Clear Filters

Work Tasks - With WTBA

Planned Tasks	Contains	Status
WT-1255022	WT-1255022 - Important, Sch...	Closed
WT-1255023	WT-1255023 - Urgent, Schapi...	Closed
WT-1255057	WT-1255057 - Urgent, Schapi...	Closed
WT-1255491	560 Lincoln Lint Trap Monthl...	Completed
WT-1255651	WT-1255651 - Urgent, Schapi...	Closed
WT-1255659	WT-1255659 - Urgent, Schapi...	Closed
WT-1255662	WT-1255662 - Medium, Scha...	Closed
WT-1255664	WT-1255664 - Urgent, Schapi...	Closed
WT-1255816	WT-1255816 - Important, Sch...	Closed
WT-1256062	WT-1256062 - Routine, Scha...	Closed
WT-1256092	WT-1256092 - Urgent, Schapi...	Closed
WT-1256102	WT-1256102 - Urgent, Schapi...	Closed