

Applying a Budget Line to an Entire Requisition

This document is a quick reference guide for users wishing to apply a budget line to an entire requisition in the Arizona Procurement Portal (APP). If you have any questions, please contact the APP Help Desk at <u>app@azdoa.gov</u>. Additional resources are also available on the SPO website: <u>https://spo.az.gov/</u>.

Users are able to apply budget line information within an item to all line items within a requisition. This option is available once a user adds all budget information to one line item.

Applying Budget Line to an Entire Requisition

- 1. Create a requisition with multiple line items.
- 2. Complete the requisition required fields.
- 3. Scroll to the **Items & Services** section and click the **Pencil** icon to edit the item's Details.

Add	Additional C	Charges			
~	0 Sele	ected 🕑 Edit	Lines - Set Allocations		
	3	<u>#</u>	Order Item Reference	ŧ	Short Description
	è 🕅	662843-1	CTR053227-PC21-2B		Surgical Mask (QKF

- 4. Select a Tax Rate.
- 5. Select an Order Supplier/Distributor and Supplier Contact if one is not auto populated.
- 6. Expand the **Budget Information** field and enter your budget information (ex. **Organization**, **Fiscal Year**, **Budget Fiscal Year**, **Function**, and **Object** fields).
- 7. Click Save.

Pudget Allecetic	n - Minimum Poqu	ired Eielde Eer S	7 JI Enc	umbranco				
Budget Allocatio	on - Minimum Requ	ired Fields For 5	Iccestrui Enc	umprance				
If allocation elements, A	ccounting Template or Function	are blank, then dimensions r	arked as bare minimu	n to process the requisition wi	ill be mandatory in AFIS			
 Those bare minimum all 	ocation elements are: Budget Fi	cai Year, Unit, Fund, Appr U	it, Object, Task and Ag	ency (AFIS - Department)				
Allocations								
/ liocations								
	Remaining To Allocate							
+ Allocation	0.00	USD						
Copy Line(s)	Apply to entire Re	quisition			0			
Copy Line(s)	Apply to entire Re	quisition			6			
Copy Line(s) Allocation	Apply to entire Re	quisition Pretax Amount © (USD)*	<u>Tax</u> 🚖 Organ	ization ()	6 Organization	Fiscal Year	Budget Fiscal Year*	Functi



It is important to click **Save** after you enter your budget information before proceeding to the next step.

- 8. Expand the **Budget Information** section, select the **checkbox** next to the budget line you would like apply to the entire requisition.
 - Allocations Remaining To Allocate: + Allocation 0.00 USD Copy Line(s) Apply to entire Requisition 9 Organization 🛈 ~ Tax 婁 Organization Allocation ID % (USD) 8 State Procurement Office 8 -Arizona Department of Administration 100.00 % _|||_ 39.90 1 Record(s)
- 9. Click the Apply to Entire Requisition button.

- 10. Click Save & Close.
- 11. Navigate to the **Budget Information** section, notice the budget information has been completed on all your line items.

Budget Information											
ltem No 🚖	Item Label 🔶	<u>In %</u> 🚖	Pretax Amount 🝨	<u>Tax</u> 🝨	Fiscal Year 🚖	<u>Organization</u>	Agency 🚖	<u>Object</u> 🛔	Budget Fiscal Year 🜲	Function 🚖	Department
662843-1	Surgical Mask (QKR) - Bulk Qty - 6-10 Day Delivery	100.00	39.90		2024	State Procurement Office	Arizona Department of Administration	7321 - Office Supplies	2024	SPO6300000 - CO OP STATE PURCHASING	732100 - Off Supplies
662843-2	Surgical Mask (QKR) - Bulk Qty - 2-5 Day Delivery	100.00	39.90		2024	State Procurement Office	Arizona Department of Administration	7321 - Office Supplies	2024	SPO6300000 - CO OP STATE PURCHASING	732100 - Off Supplies
2 Record(s)											

12. Edit all other line item's Tax, Supplier Contact, etc.



Tax Rate, Order Supplier/Distributor and Supplier Contact information will not copy into other lines, this information MUST be added to all line items individually.

- 13. Complete all other required fields on your requisition.
- 14. Click Submit for Approval.

Resources

Click the link below for more information on the requisition creation processes in APP:

https://spointra.az.gov/arizona-procurement-portal/app-support/quick-reference-guides-176-upgrade/procure-paygrgs-176