# Getting Started with Cost Allocation

Administrator access is necessary to manage setup for Cost Allocation on your account. If you do not have Administrator access to set up this functionality please contact our eCommerce customer support team at 800-753-7970 or customercare@mscdirect.com we're happy to help.

Log in with an administrator's account and select **"Cost Allocation Management"** from the left navigation bar under My Business Solutions.

## Make Cost Allocation mandatory on all internet orders

Will force the use of cost allocations for all users. This is beneficial for auditing purposes and reporting. If you do not want to enforce Cost allocation for all users, simply select no.

## Setting Order Level Cost Allocation Defaults

Setting the Order Level Default to Yes will allow for the cost allocation to be active in the shopping cart and will default all items to the Category and Values selected for a specific user.

## Allow Line Item Override

Allowing Line Item Override allows users to make changes outside of Order Level and defaulted categories and values.

## Category Append required

Category append was created to allow customers to carry the line item coding to the credit card companies via the PO field. Selecting category append will override the PO field at the account level for all orders using Cost Allocation. The Category Append functionality will concatenate all active categories and populate them into the PO field (up to 17 characters).

## Cost Allocation Management - Manage Categories

You can setup and manage Cost Allocation from this page, allowing you to manage expense reporting. Learn More

* Make Cost Allocation mandatory on all Internet orders:  ● Yes  ○ No

* Default all carts to Order-Level Cost Allocation:  ● Yes  ○ No

* Allow line item override:  ○ Yes  ● No

* Category append required: ❓  ● Yes  ○ No

| Manage Categories | Manage Users | Upload History |
|---|---|---|

Category Search: [_____]  GO ➡          + ADD NEW CATEGORY

Download Categories & Category Values: CSV|TXT

## Download Categories and Category Values

Downloading of categories and category values is functionality that can be utilized to create a report via CSV file or TXT file. This report is useful for a bird's eye view of users and what category and category value assignment users may have or need changed.

Fields include: Category, whether or not it's a required category, the category status (active/inactive), category value, category value description, category value status (active/inactive), category value visibility, web ID, user name, whether or not cost allocation is visible during checkout, and what users can see the cost allocation screen during checkout.

## Cost Allocation Management - Manage Categories

You can setup and manage Cost Allocation from this page, allowing you to manage expense reporting. Learn More

* Make Cost Allocation mandatory on all Internet orders:   ⦿ Yes   ○ No

* Default all carts to Order-Level Cost Allocation:   ⦿ Yes   ○ No

* Allow line item override:   ⦿ Yes   ○ No

* Category append required: ❓   ⦿ Yes   ○ No

| Manage Categories | Manage Users | Upload History |
|---|---|---|

Category Search: [          ]  GO ➡          + ADD NEW CATEGORY

Download Categories & Category Values: CSV|TXT

# Setting Up a Category and Value

## What is a Category and a Category value?

Using a file cabinet as an example:   a Category should be a generic label you use to identify your Category Value.  A file cabinet drawer for example would be the generic label, the Category Value would be the folders within that drawer.

**Category:**  DEPARTMENT    **Category Value (folder):**  FACILITIES, MANUFACTURING, etc.



Categories are limited to 5 active at any given time (drawer), Category Values are unlimited (file folders within that drawer).

To set up Categories and Values, select "**Add New Category**."
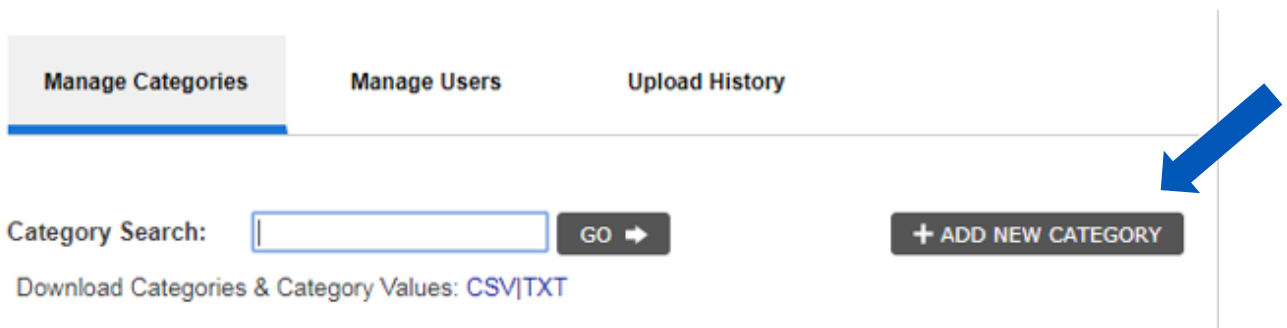
## Add New Category

In the example below, the category name is Department. Assign your first value to this category that corresponds to a department in your organization (i.e: Manufacturing). The Category name, Value name and Value description can be alpha or numeric. At this point you can make this category active or inactive, which will indicate if it is needed during the order process.

**Note:** you can have many categories but only 5 categories can be active at a given time. We will prompt you during setup to correct this if necessary.

## Category Value Visible To

Category Value Visible To is functionality which will allow you to control who will be utilizing and have visibility into the Categories and Category Values which have been created.  It will be defaulted automatically to All Users.  Should you need to limit to Specific Users select the radio button associated with Specific Users. Then select the Create & Add Restrictions button which changes once Specific Users is selected.

### Add New Category

Create a new category for your Cost Allocation below.

|  |  |
|---|---|
| * Category Name: | DEPARTMENT |
| * Required: | Optional ▼  Note: Creating a required category will enable all users to see Cost Allocation. |
| * Category Status: | ● Active  ○ Inactive |

Note: You must create a Category Value for your new category.

|  |  |
|---|---|
| * Category Value: | Manufacturing |
| Category Value Description: | 123456 |
| * Category Value Status: | ● Active  ○ Inactive |
| * Category Value Visible To: | ● All Users  ○ Only specific Users |

CANCEL    CREATE ➡

# Setting Up Restrictions

Setting up restrictions at the user level is very easy to do.  First you want to select the user from the Cannot or Can See listing. Select the box next to their name(s) and use the arrow to move them to the Can See or Cannot see list.  Note the page scrolling options under the user listing. select all that apply then click the save and close button.

| Manage Categories | Manage Users | Upload History |
| --- | --- | --- |

**Please make sure to save your changes under the Manage Categories tab before clicking outside the tab.**

| | |
| --- | --- |
| **Category Name:** | COST CENTERS |
| **Category Required:** | No |
| **Category Status:** | Active |
| **Category Value Name:** | 123456 |
| **Category Value Description:** | 123456 |
| **Category Value Status:** | Active |
| **Category Value Visible To:** | Only specific Users |

Search Users by:

○ Cannot see    ◉ Can see    [Search for names.. 🔍]

**Cannot see**
Cannot see category: ⇕

**Can see**
Can see category: ⇕                    CLEAR ALL

☐ AARON DAMRON

☐ ABBOTT CHRIS

☐ ADREANNA BROOKS

☐ ADRIENA JONES

☐ AGGIE PERRY

☐ ALAN YANG

☐ ALANA ALBERT

| 1 | 2 | 3 | 4 | 5 | > | >> |

CANCEL    SAVE & CLOSE ➡

## Setting Up Additional Values for a Category

To add additional values to your established categories, select the "**Edit**" link that corresponds to the category you want to edit.

# Edit or Add New Category Values

To add additional values to this category, select "Add New Category Value."  Add a new value and description. Create the Category Value Status as Active or Inactive and click "Create" to save. Choose if the Category Value will be visible to the user. The form will remain open for you to enter as many values as you would like. When you are finished, close the form by using the X in the upper right corner.

## Edit New Category Value

### Edit Category Value JOHN

You can edit the category value below.

| | |
|---|---|
| * Category Value: | JOHN |
| Category Value Description: | John - 123456 |
| * Category Value Status: | ⦿ Active  ◯ Inactive |
| * Category Value Visible To: | ⦿ All Users  ◯ Only specific Users |

**+ DELETE THIS CATEGORY VALUE**    **CANCEL**    **SAVE ➡**

## Add New Category Value

### Add New Category Value to CONTACTS

You can create a new category value for this category.

| | |
|---|---|
| * Category Value: | Laura |
| Category Value Description: | Laura - 987654 |
| * Category Value Status: | ⦿ Active  ◯ Inactive |
| * Category Value Visible To: | ⦿ All Users  ◯ Only specific Users |

**CANCEL**    **CREATE ➡**

# MANAGING USERS

To manage user's select the Manage Users tab.  To search for a user, enter their first or last name within the search field.  If you want to make updates to multiple contacts at one time, select the check box next to each contact, make your selections from the dropdown menus and click "Apply" to save changes. To make updates to an individual contact, click the "Edit" link that corresponds to the contact you want to update.
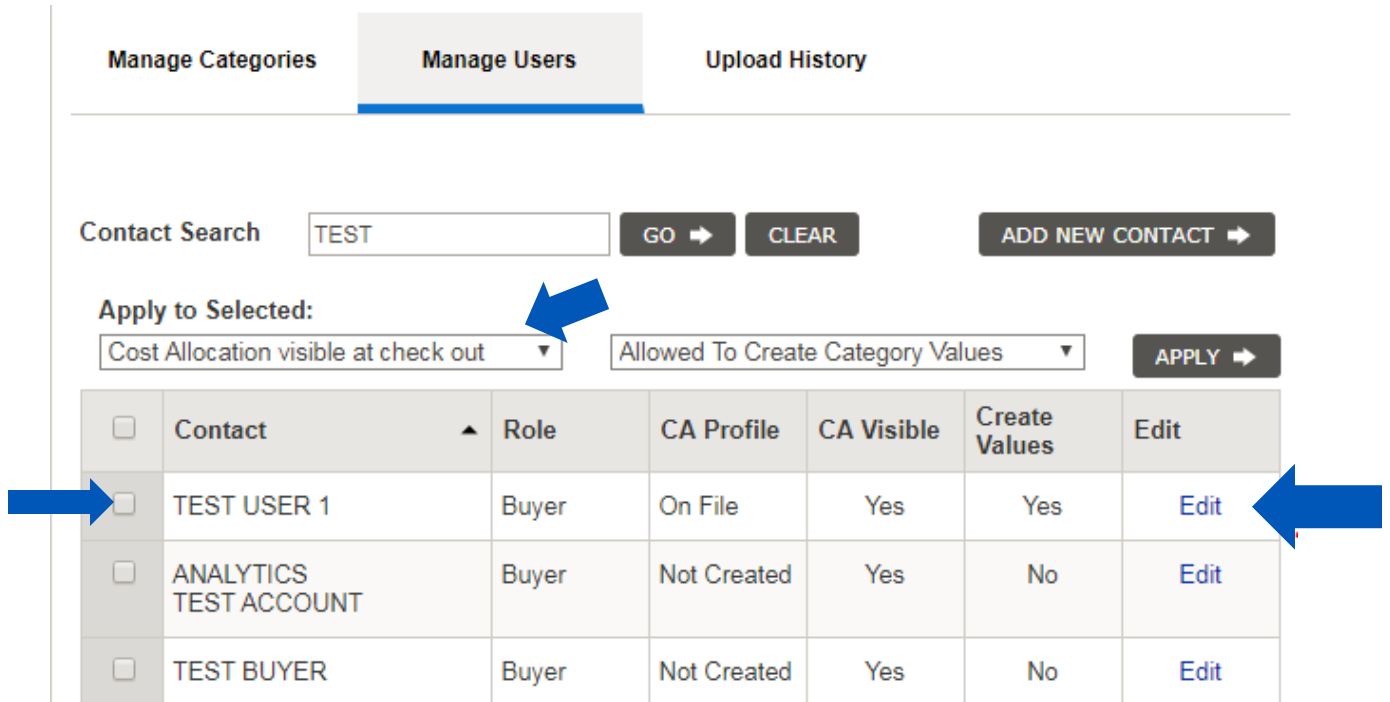
| Manage Categories | Manage Users | Upload History |
| --- | --- | --- |

Contact Search [TEST] [GO ➡] [CLEAR]   [ADD NEW CONTACT ➡]

**Apply to Selected:**

[Cost Allocation visible at check out ▼]  [Allowed To Create Category Values ▼]  [APPLY ➡]

| ☐ | Contact ▲ | Role | CA Profile | CA Visible | Create Values | Edit |
| --- | --- | --- | --- | --- | --- | --- |
| ☐ | TEST USER 1 | Buyer | On File | Yes | Yes | Edit |
| ☐ | ANALYTICS TEST ACCOUNT | Buyer | Not Created | Yes | No | Edit |
| ☐ | TEST BUYER | Buyer | Not Created | Yes | No | Edit |

# EDITING A USER

When editing a user you can choose whether or not Cost Allocation is visible to this contact when they are placing an order and if allowed to create category value during the order process. You can also opt to automatically apply certain Cost Allocation default settings to all orders placed by this contact and not allow a user to see options during checkout.

## Edit LAURA MERCURIO's Cost Allocation Settings

You can edit and save your contact's cost allocation settings below.

| | |
|---|---|
| **Contact Name:** | LAURA MERCURIO |
| **Role:** | Administrator |
| * **CA Visible at checkout:** | ● Yes ○ No |
| * **Allowed to Create Category Values:** | ○ Yes ● No |

You can assign Cost Allocation to users so that it will be applied automatically to all orders placed by them:

| | |
|---|---|
| CONTACTS | - Select Category Value - ▼ |
| COST CENTERS | - Select Category Value - ▼ |
| DEPARTMENTS | - Select Category Value - ▼ |
| Job Code | - Select Category Value - ▼ |
| POs | - Select Category Value - ▼ |

CANCEL    SAVE ➡

# Upload Category Updates

Uploading of categories will provide easy ability for creating user access to specific categories and category values in addition to updates. Simply upload a file created with CVS or TXT format.

Fields include: Category, whether or not it's a required category, the category status (active/inactive), category value, category value description, category value status (active/inactive), category value visibility, web ID, user name, whether or not cost allocation is visible during checkout, and what users can see the cost allocation screen during checkout.

| Manage Categories | Manage Users | Upload History |
| --- | --- | --- |

**Contact Search** [ TEST ]  GO ➡  CLEAR          ADD NEW CONTACT ➡

**Apply to Selected:**

[ Cost Allocation visible at check out ▼ ]  [ Allowed To Create Category Values ▼ ]  APPLY ➡

| ☐ | Contact ▲ | Role | CA Profile | CA Visible | Create Values | Edit |
| --- | --- | --- | --- | --- | --- | --- |
| ☐ | TEST USER 1 | Buyer | On File | Yes | Yes | Edit |
| ☐ | ANALYTICS TEST ACCOUNT | Buyer | Not Created | Yes | No | Edit |
| ☐ | TEST BUYER | Buyer | Not Created | Yes | No | Edit |

UPLOAD CATGEORY UPDATES ➡

1 | 2                                       Next >>

---

**Upload Cost Allocation Updates**

You can upload your Cost Allocation updates. Select a csv with comma as delimiter or a text file with tab as delimiter.

\* **Select File:**  [ Choose File ] No file chosen

CANCEL   UPLOAD ➡

# Applying Cost Allocation Settings from the Shopping Cart

In the shopping cart, you will be able to apply Cost Allocation settings to your entire order **(Order Level)** or to individual items **(Item Level)** within your cart.

**Order Level Cost Allocation**
To assign categories and values to your entire order, turn on order level cost allocation by switching the lever to **"ON**." Select a value from the dropdown and click **"Apply to All Items."**

## Item Level Cost Allocation

If you would rather apply Cost Allocation to an individual item, scroll to the item level and select **"Override Order-Level Cost Allocation."** Then apply the appropriate values at the item level. You may also revert to Order Level Cost Allocation at any time.

**Applying Split Level Cost Allocation**

Within Item Level Cost Allocation, you can split line item allocation to more than one value within the same category. For example, if you are buying 10 anchoring screens and you want to allocate 6 of them to your Manufacturing department and 4 to Facilities. Select the **Override Order-Level Cost Allocation** and then Click **"Add Split,"** enter the desired quantities, choose the appropriate selection from each dropdown and select **"Update Cart."**