Getting Started with Cost Allocation

Log in with an administrator’s account and click “My Account” in the header. Select “Cost Allocation Management” in the left navigation bar.

Note: To set up this functionality please contact our eCommerce customer support team at 800-753-7970 or cust_service@mscdirect.com if you need to have administrator access established for your account.

Tip: Automatically require all users to use Cost Allocation by selecting “Make Cost Allocation mandatory on all internet orders.” If you do not want to require Cost Allocation for all users, simply select no.

Setting Up a Category and Value

To set up categories and values, select “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 (ie: Manufacturing). We will show you in the next step how to add additional values to this category by editing it later. At this point you can make this category active or inactive, which will indicate if it is needed during the order process.
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. We'll stick with the Department example from above.

On the Edit Category Values screen, you will notice the initial value you set up (in this case, Facilities) is listed in the Category Values table. To add additional values to this category, select “Add New Category Value.”
Add a new value (like Accounts Payable) and description, if necessary. Click “Create” to save. The form will remain open for you to enter as many values as you would like. When you are finished, close the form.
Managing Users

You can automatically require all users on your account to use Cost Allocation by selecting “Make Cost Allocation mandatory on all Internet orders.” If you do not want to require Cost Allocation for all users, simply select no.

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.
Here you have the ability to choose whether or not Cost Allocation is visible to this contact when he is placing an order and if he is allowed to create category values 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.

**Applying Cost Allocation Settings**

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, turn Order Level cost allocation off, then scroll to the item. Select a value from the dropdown and click “Update Cart.”
Applying Split Level Cost Allocation

Within Item Level Cost Allocation, you have the ability to split line item allocation to more than one value within the same category. For instance, you are buying 10 anchoring screens and you want to allocate 6 of them to your Manufacturing department and 4 to Facilities. Click “Add Split,” enter the desired quantities, choose the appropriate selection from each dropdown and click “Update Cart.”

You also have the option to override Order Level Cost Allocation at the item level. For example, if you want to allocate your entire order to your Manufacturing department except for one item that you want to allocate to Facilities, turn on Order Level Cost Allocation by changing the lever to “ON,” then click the “Override Order Level” link under the appropriate item, make your selection from the dropdown and click “Update Cart.”
<table>
<thead>
<tr>
<th>Item #06978522</th>
<th>Adhesive Anchoring Screens &amp; Tubes</th>
<th>For Rod Diameter (Inch): 1/2</th>
<th>Material: Nylon</th>
<th>Length (mm): 152.40</th>
<th>Length (Inch): 6</th>
<th>Length (Decimal Inch): 6.0000</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>STOCK STATUS: In Stock</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Routing Note:**

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**Cost Allocation:** Qty.  Category Name:  Category Value:  Add Split

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**Override Order Level:**

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Department: None