



Personalizing the Distribution Line - Invoice Information Page

Cardinal allows users to change the order the fields display on the Invoice Information tab for the **Distribution Line** section. This allows you to set up the order of the ChartFields in the way that works best for how you enter Vouchers for your Agency.

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Personalizing the Distribution Line – Invoice Information Page

Step	Action
1.	<p>Navigate to the Voucher page using the following path:</p> <p>Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry</p>
<p>The Voucher page displays with the Add a New Value tab displayed by default.</p> <div><div>Favorites ▾Main Menu ▾>Accounts Payable ▾>Vouchers ▾>Add/Update ▾>Regular Entry</div><div><div>Voucher</div><div><div>Find an Existing ValueAdd a New Value</div><div><div>Business Unit50100</div><div>Voucher IDNEXT</div><div>Voucher StyleRegular Voucher ▾</div><div>Supplier Name</div><div>Short Supplier Name</div><div>Supplier ID</div><div>Supplier Location</div><div>Address Sequence Number0</div><div>Invoice Number</div><div>Invoice Date</div><div>Gross Invoice Amount0.00</div><div>Freight Amount0.00</div><div>Misc Charge Amount0.00</div><div>Estimated No. of Invoice Lines1</div><div>Add</div></div></div></div></div>	
2.	<p>Click the Add button.</p> <div>Add</div>



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The **Invoice Information** tab displays.

Invoice Information | Payments | Voucher Attributes

Business Unit: 15100 | Invoice No: | Accounting Date: 10/02/2024 | Voucher ID: NEXT | Voucher Style: Regular Voucher | Invoice Date: | Invoice Receipt Date: | Goods & Services: | Receipt Date: | Supplier ID: | ShortName: | Location: | *Address: | Responsible Org: 10000 | Customer Account #: | ROW Acquisition ID: |

Invoice No: | Accounting Date: 10/02/2024 | *Pay Terms: 30 | Basis Date Type: Prompt Payment | Net 30 |

Invoice Total

Line Total	0.00
*Currency	USD
Miscellaneous	
Freight	
Total	0.00
Difference	0.00

Non Merchandise Summary

- Session Defaults
- Comments(0)
- Attachments(0)
- Template List
- Advanced Supplier Search
- Supplier Hierarchy
- Supplier 360

Save | Save For Later | Action: | Run | Calculate | Print

Copy From Source Document

Invoice Lines

Line 1 | Copy Down | SpeedChart: | One Asset: | Calculate

*Distribute by: Amount | Ship To: COVA | Description: | Packing Slip: |

Quantity: | UOM: | Unit Price: | Line Amount: 0.00

Multi-SpeedCharts

Distribution Lines

Personalize | Find | View All | First | 1 of 1 | Last

GL Chart	Exchange Rate	Statistics	Assets	FI							
Copy Down	Line	Merchandise Amt	Quantity	*GL Unit	Account	Fund	Program	Department	Cost Center	Task	FI
+	-	1	0.00		15100						

Save | Save For Later | Notify | Refresh | Add | Update/Display

Invoice Information | Payments | Voucher Attributes

3. Click the **Personalize** link at the top of the **Distribution Lines** section of the page.

Distribution Lines

Personalize | Find | View All | First | 1 of 1 | Last

GL Chart	Exchange Rate	Statistics	Assets	FI							
Copy Down	Line	Merchandise Amt	Quantity	*GL Unit	Account	Fund	Program	Department	Cost Center	Task	FI
+	-	1	0.00		15100						



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The **Grid Customization** page displays in a pop-up window.

Grid Customization

Help

Distribution Lines

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

Column Order

- Tab GL Chart (frozen)
- Copy Down (frozen)
- Line (frozen)
- Merchandise Amt (frozen)
- Quantity (frozen)
- GL Unit
- Account
- Fund
- Program
- Department
- Cost Center
- Task
- FIPS
- Asset
- Agency Use 1
- Agency Use 2
- PC Bus Unit
- Project
- Activity
- Source Type
- Category
- Subcategory
- Affiliate
- Fund Affiliate
- OpenItem
- Budget Date
- Tab Exchange Rate
- GL Unit
- Currency
- Exchange Rate
- Tab Statistics
- Statistics Code
- Statistic Amount
- UOM
- Tab Assets
- Asset
- Business Unit
- Profile ID
- Asset ID
- Sequence Number
- Cost Type

Sort Order

☐ Hidden
☐ Frozen

☐ Descending

OK Cancel Preview Copy Settings

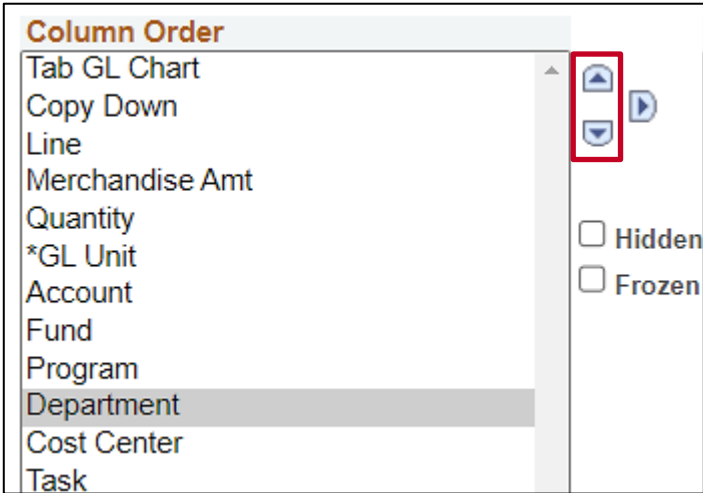
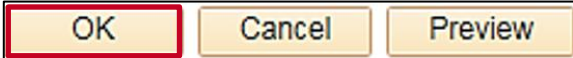

	To change the order of the fields in the Distribution Lines section, use the Column Order side of the page. If any display as “(frozen)”, unfreeze them so you can move the fields around.
4.	To remove the (frozen) status, click the first item listed as (frozen). Tab GL Chart (frozen)



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Step	Action
	<p>A checkmark displays in the Frozen checkbox.</p> <div><p>Grid Customization</p><div><p>Column Order</p><div>Tab GL Chart (frozen) Copy Down (frozen) Line (frozen) Merchandise Amt (frozen) Quantity (frozen) *GL Unit Account Fund Program</div><div><input type="checkbox"/> Hidden <input checked="" type="checkbox"/> Frozen</div></div><div><p>Sort Order</p><div></div><div><input type="checkbox"/> Descending</div></div></div>
5.	<p>Click on the Frozen checkbox to remove the (frozen) from all items in the list.</p> <div><input type="checkbox"/> Hidden <input checked="" type="checkbox"/> Frozen</div>
6.	<p>To change the Column Order, click the field you want to move up or down. For this scenario, Department is selected.</p> <div><p>Column Order</p><div>Tab GL Chart Copy Down Line Merchandise Amt Quantity *GL Unit Account Fund Program Department Cost Center Task FIPS Asset</div></div>

Step	Action
7.	<p>Click the up or down arrows to move the field to where you want it to display in the Distribution Lines section on the Invoice Information tab.</p> 
8.	Repeat Steps 6-7 until all fields are in the desired order.
9.	<p>Click the OK button, at the bottom of the window to accept the changes and return to the Invoice Information tab.</p> 
	<p>Click the Cancel button to cancel the changes.</p> <p>Click the Preview button to preview the changes.</p>



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The **Invoice Information** tab returns with the **Distribution Lines** fields in the order that was defined.

Navigation: Favorites > Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry

Tabs: Invoice Information | Payments | Voucher Attributes

Business Unit 15100
Voucher ID NEXT
Voucher Style Regular Voucher
Invoice Date [Calendar Icon]
Invoice Receipt Date [Calendar Icon]
Goods & Services [Calendar Icon]
Receipt Date

Invoice No [Field]
Accounting Date 10/03/2024 [Calendar Icon]
***Pay Terms** 30 [Calendar Icon] Net 30
Basis Date Type Prompt Payment
☐ Final Voucher

Supplier ID [Field] [Search]
ShortName [Field] [Search]
Location [Field]
***Address** [Field]
Responsible Org 10000 [Field] [Search]
Customer Account # [Field]
ROW Acquisition ID [Field]

Control Group [Field] [Search]
☐ Incomplete Voucher

Invoice Total

Line Total	0.00
*Currency	USD [Search]
Miscellaneous	[Field] [Search]
Freight	[Field] [Search]
Total	0.00
Difference	0.00

Non Merchandise Summary
Session Defaults
Comments(0)
Attachments (0)
Template List
Advanced Supplier Search
Supplier Hierarchy
Supplier 360

Buttons: Save, Save For Later, Action [Dropdown], Run, Calculate, Print

Copy From Source Document

Invoice Lines [?] Find | View All First 1 of 1 Last

Line 1 ☐ Copy Down SpeedChart [Field] [Search]

*Distribute by: Amount [Dropdown]
Item [Field] [Search]
Quantity [Field]
UOM [Field] [Search]
Unit Price [Field]
Line Amount 0.00
Multi-SpeedCharts

Ship To: COVA [Field] [Search]
Description [Field]
Packing Slip [Field]

☐ One Asset [Calculate]


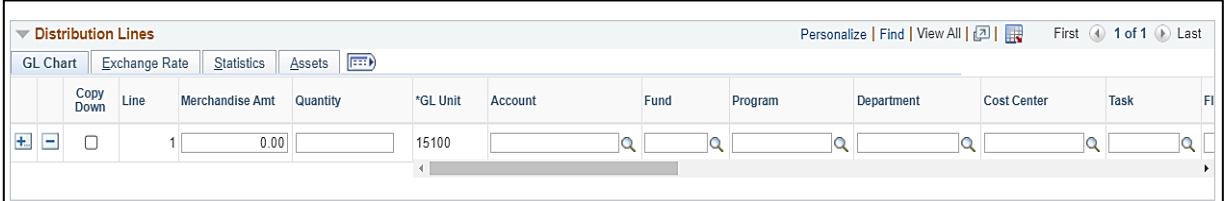
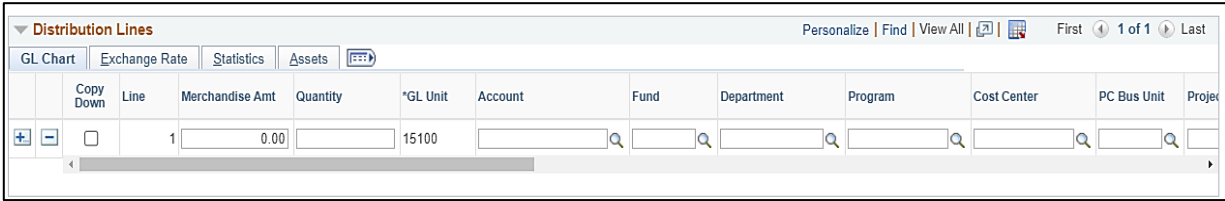
Distribution Lines Personalize | Find | View All [Icons] First 1 of 1 Last

GL Chart	Exchange Rate	Statistics	Assets	Copy Down	Line	Merchandise Amt	Quantity	*GL Unit	Account	Fund	Department	Program	Cost Center	PC Bus Unit	Projec
				<input type="checkbox"/>	1	0.00		15100		[Field] [Search]	[Field] [Search]	[Field] [Search]	[Field] [Search]	[Field] [Search]	[Field] [Search]



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Step	Action
	<p>Sample Screenshots: Below are sample screenshots showing a before and after of the Distribution Line personalization.</p> <p><u>Before</u></p> <div></div> <p><u>After</u></p> <div></div>