## 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. | Navigate to the **Voucher** page using the following path:<br>**Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry** |

The **Voucher** page displays with the **Add a New Value** tab displayed by default.

| Step | Action |
|------|--------|
| 2. | Click the **Add** button.<br> |

| Step | Action |
|------|--------|

The **Invoice Information** tab displays.



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

| Step | Action |
|---|---|
| | 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

☐ Hidden
☐ Frozen

**Sort Order**

☐ 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.<br><br>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).<br><br>Tab GL Chart (frozen) |

| Step | Action |
|------|--------|
| | A checkmark displays in the **Frozen** checkbox.  |
| 5. | Click on the **Frozen** checkbox to remove the **(frozen)** from all items in the list.  |
| 6. | To change the **Column Order**, click the field you want to move up or down. For this scenario, **Department** is selected.  |

| Step | Action |
|------|--------|
| 7. | 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.  |
| 8. | Repeat Steps 6-7 until all fields are in the desired order. |
| 9. | Click the **OK** button, at the bottom of the window to accept the changes and return to the **Invoice Information** tab.  |
| ℹ️ | Click the **Cancel** button to cancel the changes. <br> Click the **Preview** button to preview the changes. |

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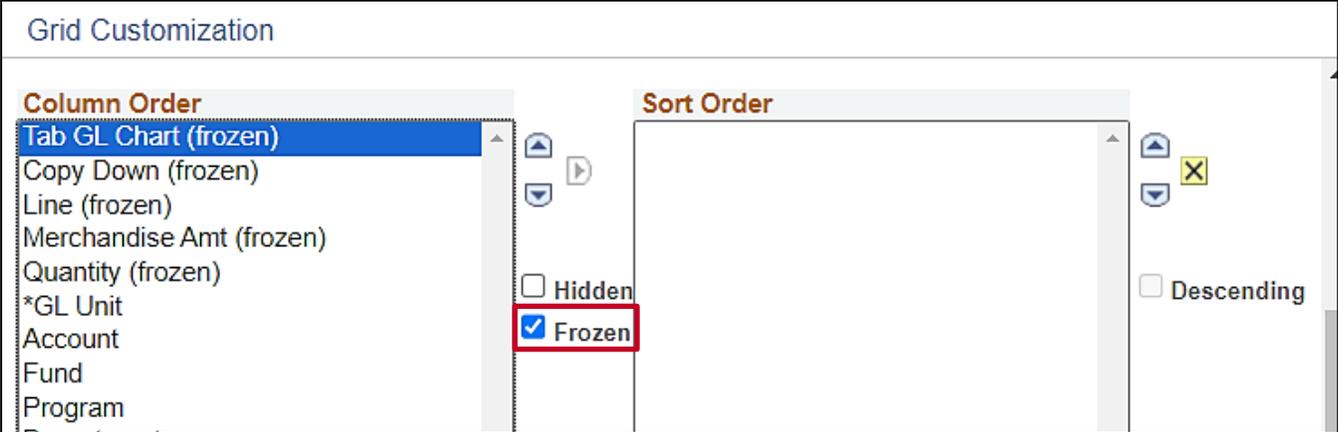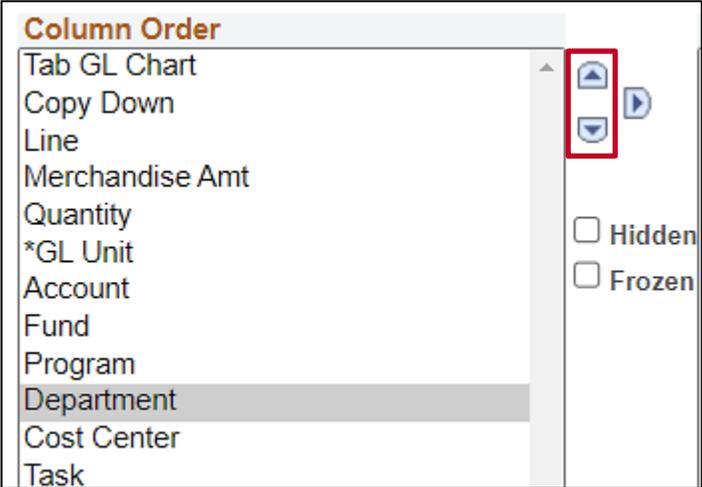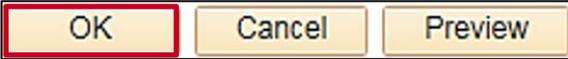
The **Invoice Information** tab returns with the **Distribution Lines** fields in the order that was defined.

| Step | Action |
|------|--------|
| ⓘ | Sample Screenshots: Below are sample screenshots showing a before and after of the Distribution Line personalization.<br><br>Before<br><br><br><br>After<br><br> |