



### Personalizing the Distribution Line - Invoice Information Page

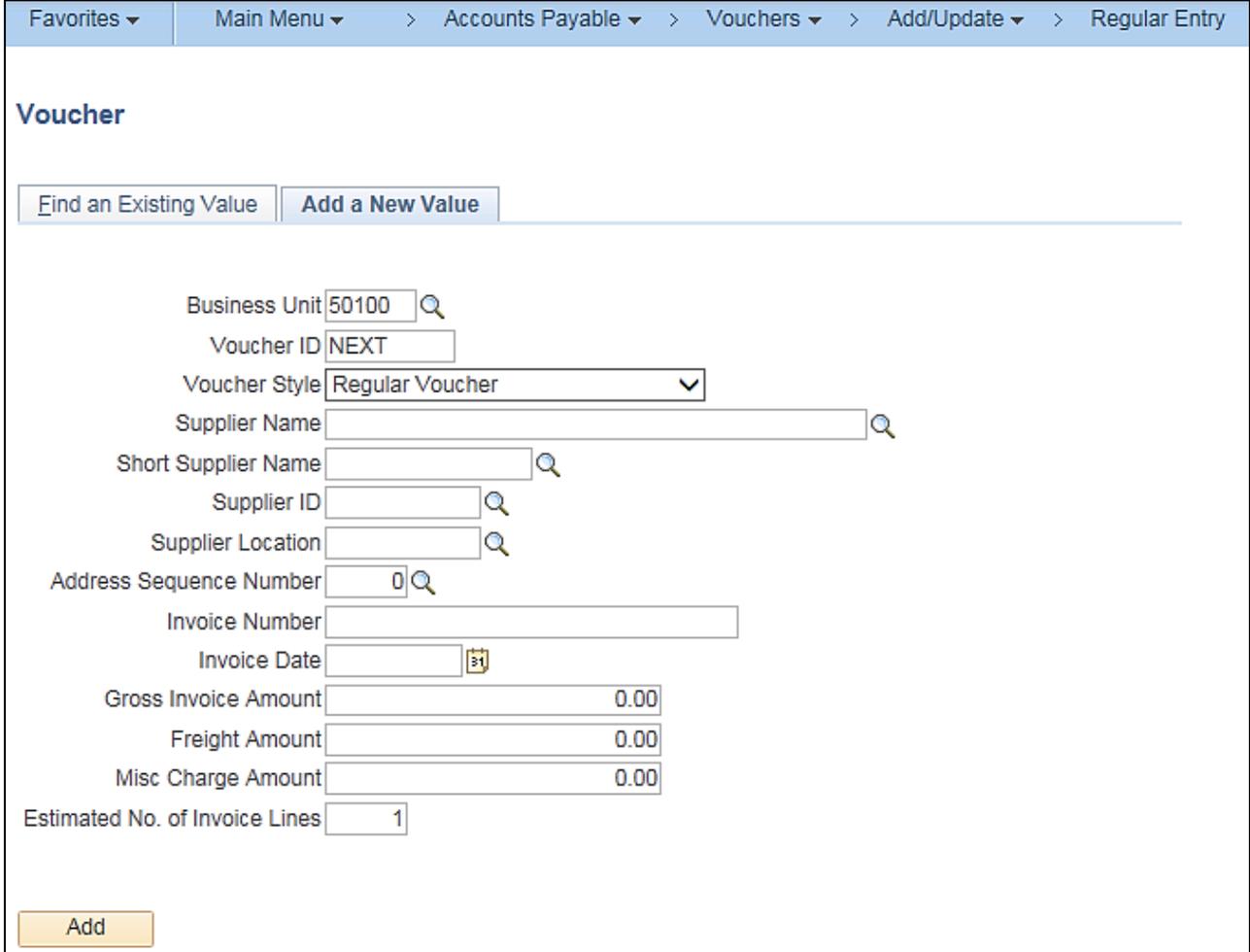
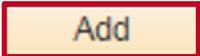
Cardinal allows users to change the order the fields display on the Invoice Information tab for the **Distribution Line** section. This allows you to set up the order of the ChartFields in the way that works best for how you enter Vouchers for your Agency.

### Table of Contents

Personalizing the Distribution Line – Invoice Information Page .....	2
--	---



### Personalizing the Distribution Line – Invoice Information Page

Step	Action
1.	Navigate to the <b>Voucher</b> page using the following path: <b>Main Menu &gt; Accounts Payable &gt; Vouchers &gt; Add/Update &gt; Regular Entry</b>
The <b>Voucher</b> page displays with the <b>Add a New Value</b> tab displayed by default.	
	
2.	Click the <b>Add</b> button. 



# Accounts Payable Job Aid

## AP312\_Personalizing the Distribution Line - Invoice Information Page

Step	Action
------	--------

The Invoice Information tab displays.

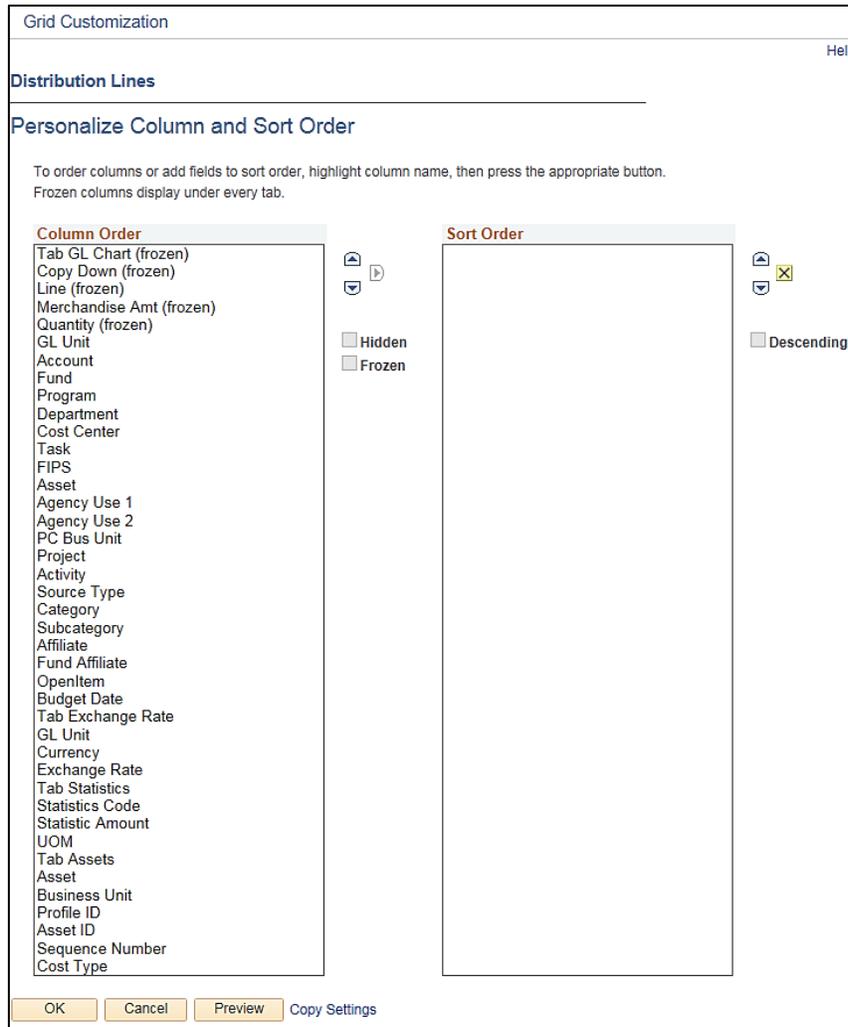
The screenshot shows the 'Invoice Information' tab in a software application. It includes fields for Business Unit (15100), Voucher ID (NEXT), Invoice No, Accounting Date (10/02/2024), and Invoice Date. There is an 'Invoice Total' summary box showing Line Total, \*Currency (USD), Miscellaneous, Freight, Total (0.00), and Difference (0.00). Below this is a 'Copy From Source Document' section and an 'Invoice Lines' section with a 'Distribute by' dropdown set to 'Amount'. The 'Distribution Lines' section is a table with columns: Copy Down, Line, Merchandise Amt, Quantity, \*GL Unit, Account, Fund, Program, Department, Cost Center, Task, and FI. A 'Personalize' link is highlighted in red in the top right of the Distribution Lines section.

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

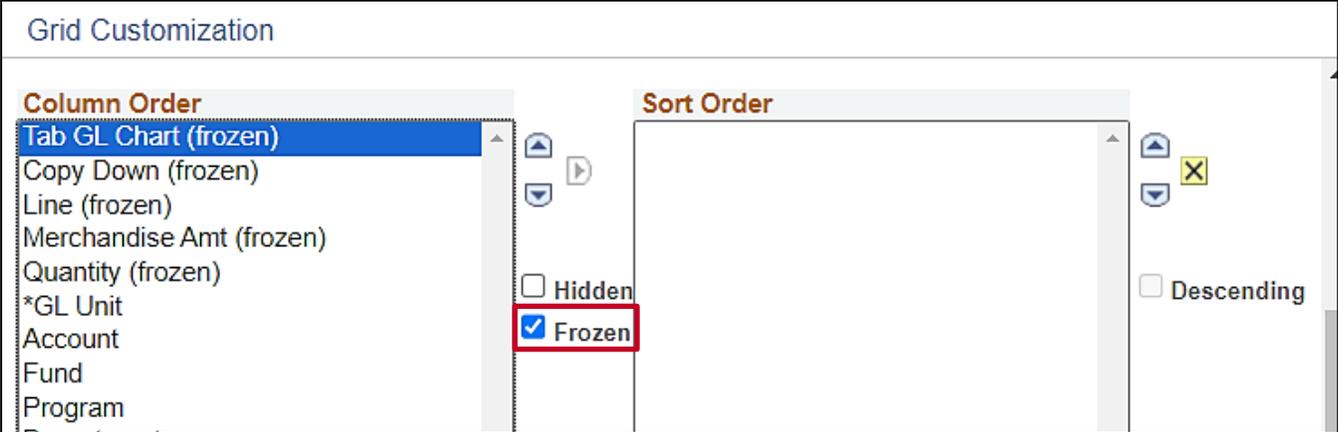
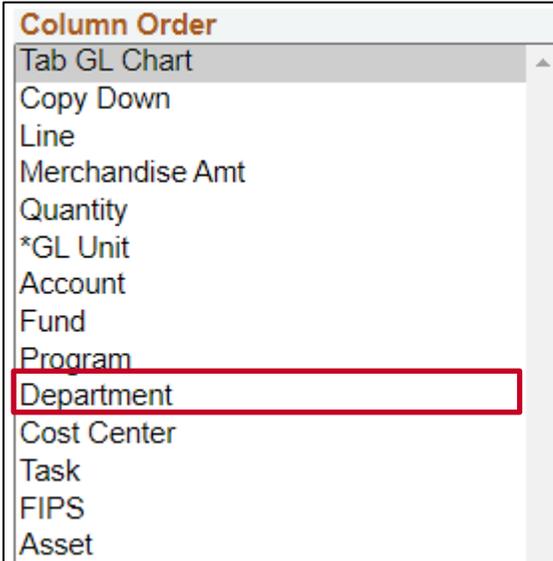
This is a close-up of the 'Distribution Lines' section. The 'Personalize' link is highlighted with a red box. The table below it shows the following data for Line 1: Merchandise Amt: 0.00, Quantity: (empty), \*GL Unit: 15100, Account: (empty), Fund: (empty), Program: (empty), Department: (empty), Cost Center: (empty), Task: (empty).

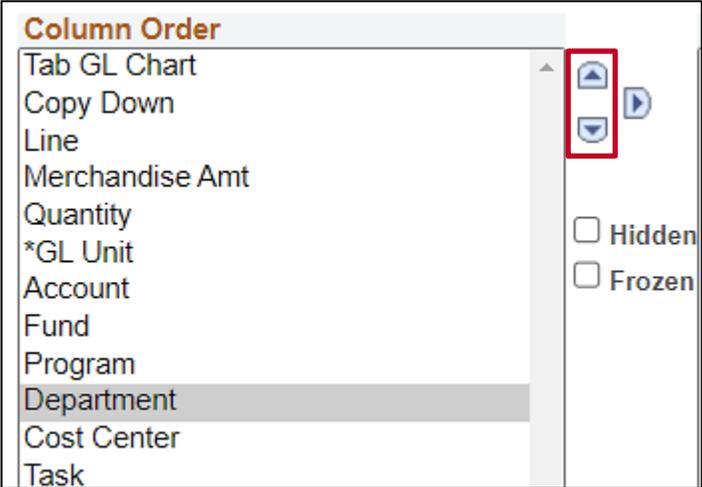
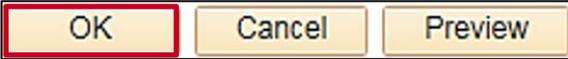
Step	Action
------	--------

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



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

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

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



# Accounts Payable Job Aid

## AP312\_Personalizing the Distribution Line - Invoice Information Page

Step	Action
------	--------

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

[Favorites](#) > [Main Menu](#) > [Accounts Payable](#) > [Vouchers](#) > [Add/Update](#) > [Regular Entry](#)

[Invoice Information](#) | [Payments](#) | [Voucher Attributes](#)

Business Unit: 15100      Invoice No:   
 Voucher ID: NEXT      Accounting Date: 10/03/2024      \*Pay Terms: 30 Net 30  
 Voucher Style: Regular Voucher      Basis Date Type: Prompt Payment  
 Invoice Date:        Final Voucher  
 Invoice Receipt Date:   
 Goods & Services:        Incomplete Voucher  
 Receipt Date:

Supplier ID:       Control Group:   
 ShortName:   
 Location:   
 \*Address:        Incomplete Voucher  
 Responsible Org: 10000  
 Customer Account #:   
 ROW Acquisition ID:

**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

       Action:            

**Copy From Source Document**

**Invoice Lines**      Find | View All      First 1 of 1 Last

Line 1     Copy Down      SpeedChart:        One Asset  
 \*Distribute by: Amount      Ship To: COVA  
 Item:       Description:   
 Quantity:       Packing Slip:   
 UOM:   
 Unit Price:   
 Line Amount: 0.00  
 Multi-SpeedCharts

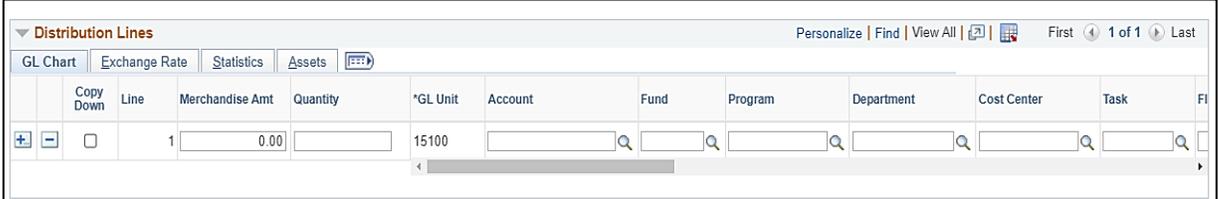
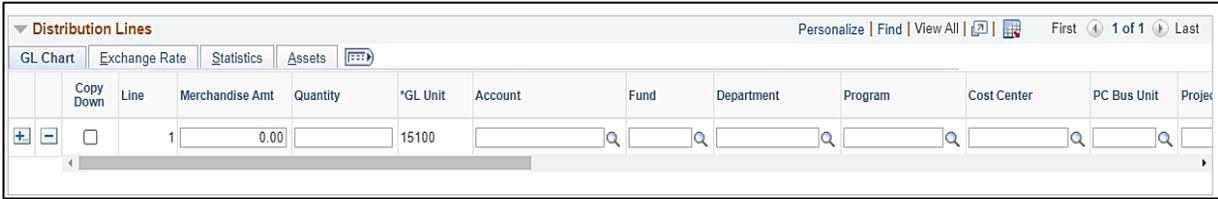
**Distribution Lines**      Personalize | Find | View All |       First 1 of 1 Last

GL Chart	Exchange Rate	Statistics	Assets	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	<input type="text"/>						



# Accounts Payable Job Aid

## AP312\_Personalizing the Distribution Line - Invoice Information Page

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 data-bbox="267 504 1485 703"></div> <p><u>After</u></p> <div data-bbox="267 777 1485 976"></div>