



Personalizing the Distribution Line - Invoice Information Page

Cardinal allows users to change the order that fields display on the **Invoice Information** page **Distribution Lines** section. This allows the user to set the order of the ChartFields in the way that works best for how Vouchers are entered for their Agency.

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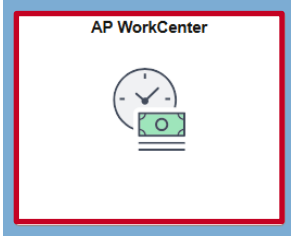
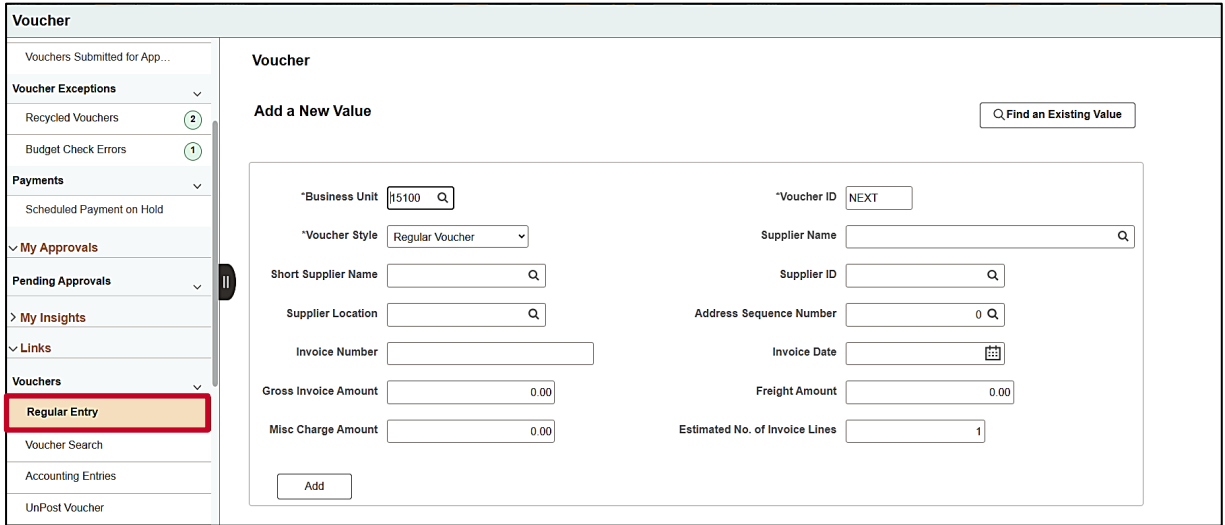
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Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
3/1/2025	Baseline.

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Step	Action
1.	Navigate to the Voucher page by clicking the AP WorkCenter tile on the Cardinal Financials Homepage. 
	For information about WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation path in the WorkCenter: Links > Vouchers > Regular Entry Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the Voucher page using the following navigation path: NavBar > Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry



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Step	Action
	The Voucher Add a New Value page displays. Add a New Value Q Find an Existing Value *Business Unit15100Q *Voucher IDNEXT *Voucher StyleRegular Voucher Supplier NameQ Short Supplier NameQ Supplier IDQ Supplier LocationQ Address Sequence Number0Q Invoice Number Invoice Date Gross Invoice Amount0.00 Freight Amount0.00 Misc Charge Amount0.00 Estimated No. of Invoice Lines1 Add
3.	Click the Add button. Add



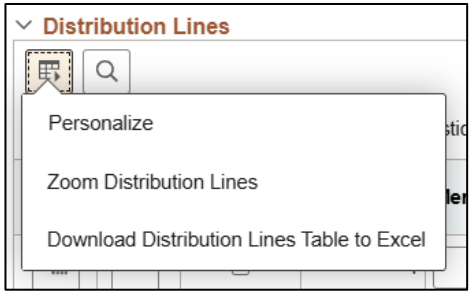
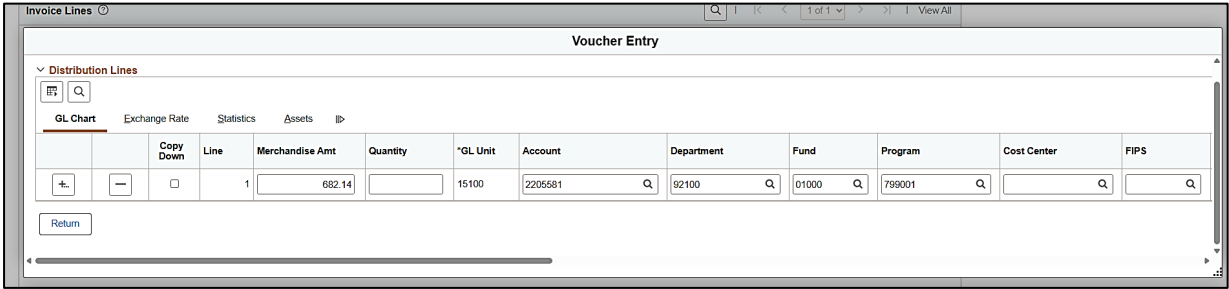
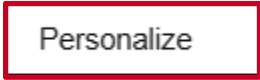
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Step	Action
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The **Invoice Information** page displays.

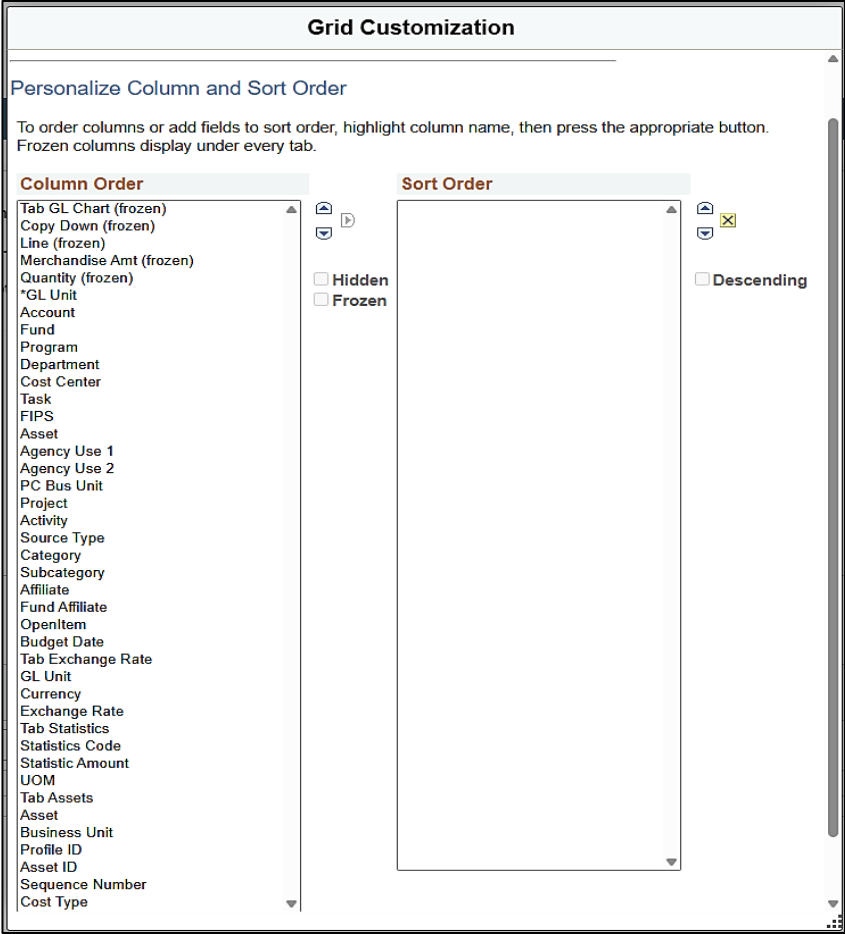
4. Click the **Grid Actions Menu** button in the **Distribution Lines** section.

Step	Action
	The Grid Action Menu options display. 
	See a description for each option below: • Personalize: allows users to personalize how the fields display in the Distribution Lines section • Zoom Distribution Lines: displays the Distribution Lines in a pop-up window • Download Distribution Lines Table to Excel: downloads the Distribution Lines into an Excel spreadsheet 
5.	Select the Personalize option. 



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Step	Action
	The Grid Customization page displays in a pop-up window. 
	To change the order of the fields in the Distribution Lines section, use the Column Order side of the page.
6.	Review to see if any fields display as “(frozen)”. If any display as “(frozen)”, proceed to the next step. If no fields display as “(frozen)” proceed to Step 9.
7.	Click the first item listed as “(frozen)”. Tab GL Chart (frozen)



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Step	Action
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A checkmark displays in the **Frozen** checkbox option.

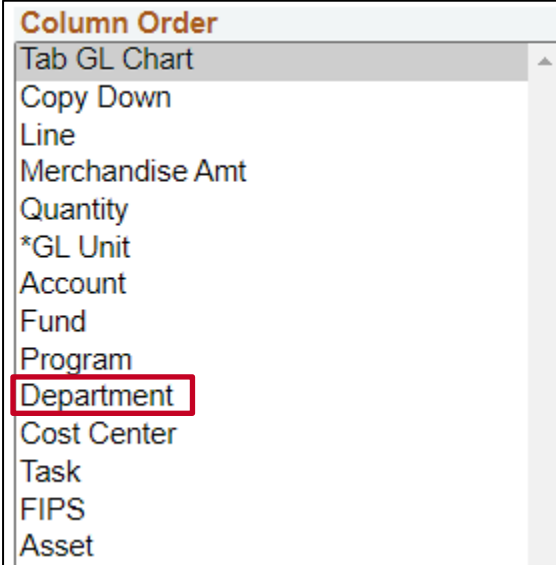
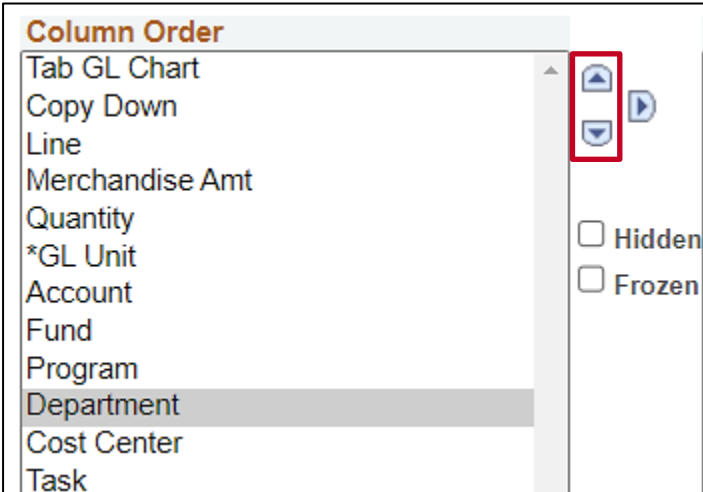
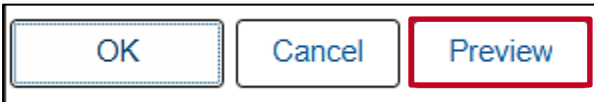
The screenshot shows the 'Grid Customization' window with the title 'Personalize Column and Sort Order'. Below the title, it says: 'To order columns or add fields to sort order, highlight column name, then press the appropriate button. Frozen columns display under every tab.' There are two main sections: 'Column Order' and 'Sort Order'. In the 'Column Order' list, 'Tab GL Chart (frozen)' is selected. To the right of this list, there are two checkboxes: 'Hidden' (unchecked) and 'Frozen' (checked, with a red box around it). The 'Sort Order' section is empty, and there is a 'Descending' checkbox which is also unchecked.

8. Select the **Frozen** checkbox option to remove the “(frozen)” from all items in the list.

A close-up of the checkbox options. The 'Hidden' checkbox is unchecked, and the 'Frozen' checkbox is checked with a blue checkmark and is highlighted with a red box.

The page refreshes and the fields are no longer displayed “(frozen)”.

The screenshot shows the 'Grid Customization' window after the refresh. The 'Column Order' list now shows 'Tab GL Chart' without '(frozen)'. The 'Frozen' checkbox is now unchecked, and the 'Hidden' checkbox remains unchecked. The 'Sort Order' section and the 'Descending' checkbox are also visible.

Step	Action
9.	Click the applicable field to be moved. For this example, Department is selected. 
10.	Click the up or down arrows to the right of the Column Order section of the page to move the field to the applicable location. 
11.	Repeat Steps 9-10 until all fields are in the desired order.
9.	Click the Preview button at the bottom of the page to review the changes. 



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Step	Action
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The **Distribution Lines** section displays at the bottom of the **Grid Customization** page.

The screenshot shows the 'Grid Customization' window. On the left is a list of fields: 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, and Cost Type. Below this list are 'OK', 'Cancel', and 'Preview' buttons. The 'Distribution Lines' section is expanded, showing a 'Find' button and tabs for 'GL Chart', 'Exchange Rate', 'Statistics', and 'Assets'. The 'GL Chart' tab is active, displaying a table with columns: Copy Down, Line, Merchandise Amt, Quantity, GL Unit, and Account. The table contains one row with Line 1, Merchandise Amt 0.00, and GL Unit 15100. A scrollbar is visible on the right side of the table.



Users may see a **Copy Settings** link display at the bottom of the page. It is not used in Cardinal.

[Copy Settings](#)

10.

Use the scrollbar to see a preview the **Distribution Lines** based on the changes that were made.

This screenshot is a zoomed-in view of the 'Distribution Lines' section. It shows the 'Find' button, the 'GL Chart' tab, and the table with one row (Line 1, Merchandise Amt 0.00, GL Unit 15100). A red rectangular box highlights the vertical scrollbar on the right side of the table, indicating where to click to scroll through the distribution lines.

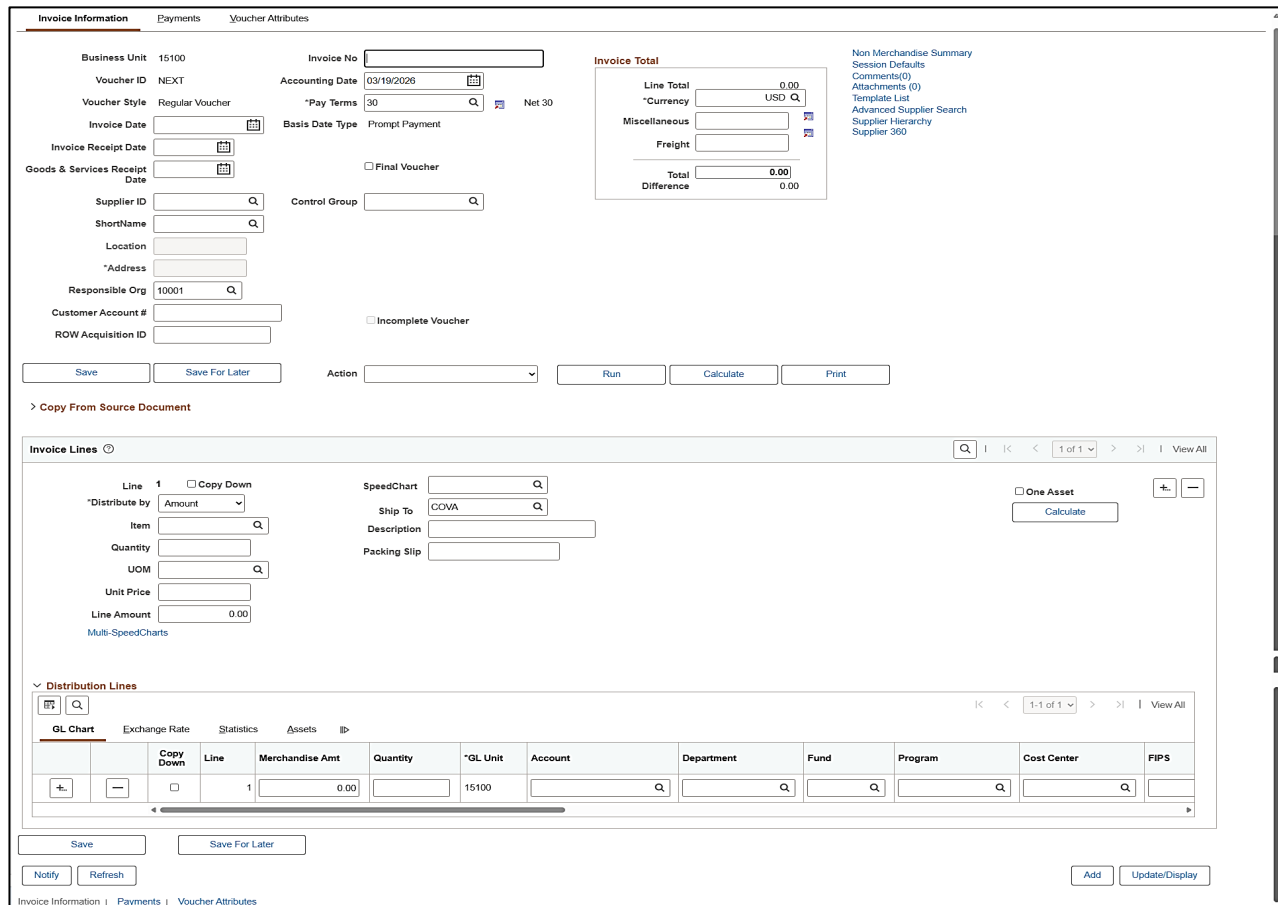


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Step	Action
11.	Click the OK button at the bottom of the window to accept the changes. 
	The Cancel button can be used to cancel the changes in needed.

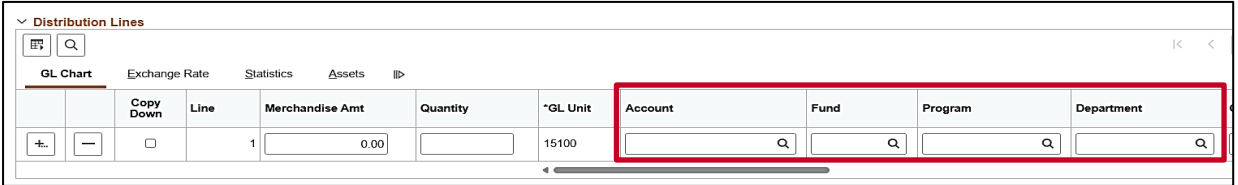
The **Invoice Information** page redispays with the applicable changes.





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Step	Action
	Sample Screenshots: Below are sample screenshots showing a before and after of the Distribution Lines after a change was made. In this example, the Department field was moved to display next to the Account field. Before:  After: 