AP312 Personalizing the Distribution Line - Invoice Information Page

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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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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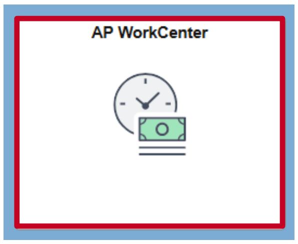
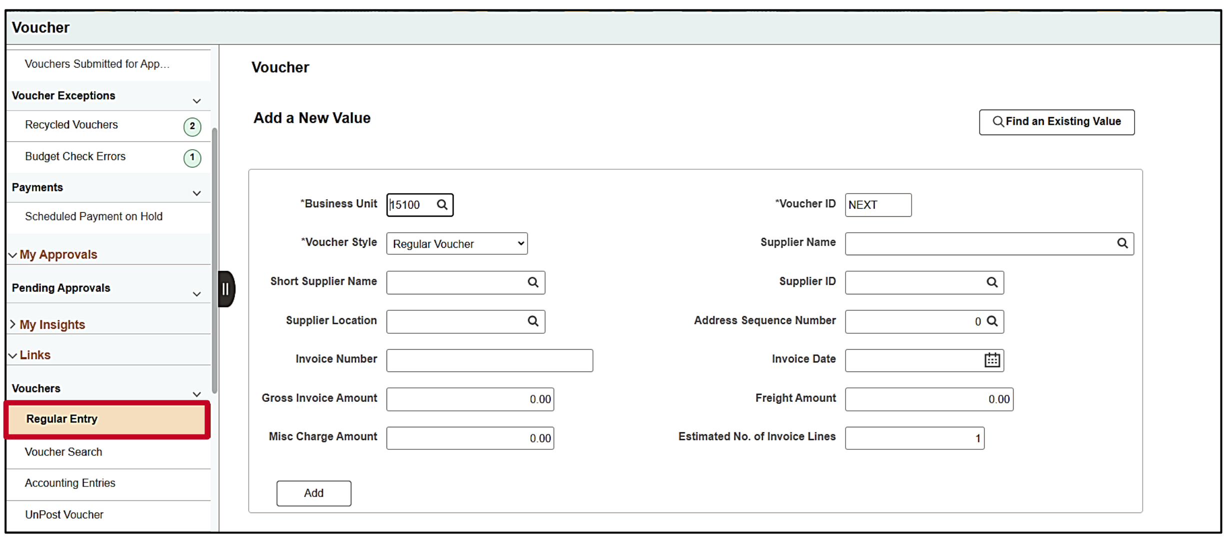
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Navigate to the Voucher page by clicking the AP WorkCenter tile on the Cardinal Financials Homepage.



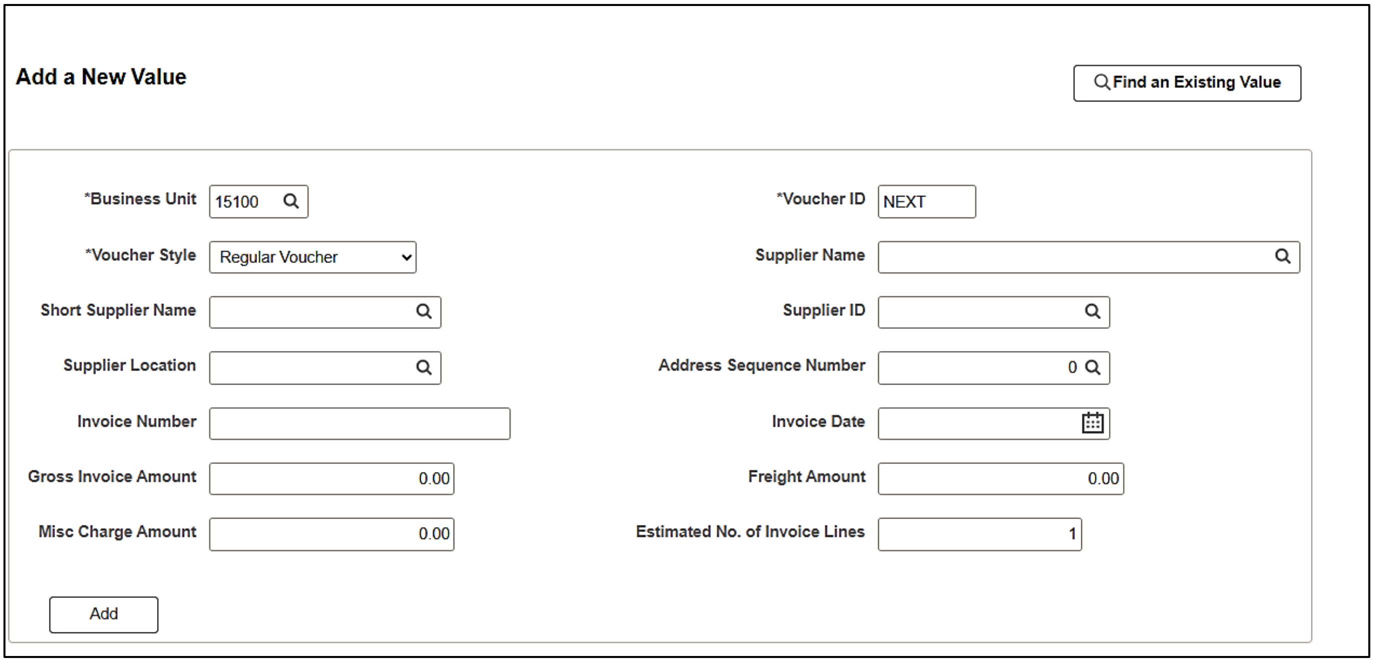
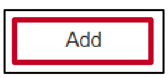
</td></tr>
<tr><td></td><td>For information about WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning.</td></tr>
<tr><td>2.</td><td>Use the following navigation path in the WorkCenter: Links > Vouchers > Regular Entry

Note: WorkCenter sections, folders, and pages may vary based on the user’s Security roles.



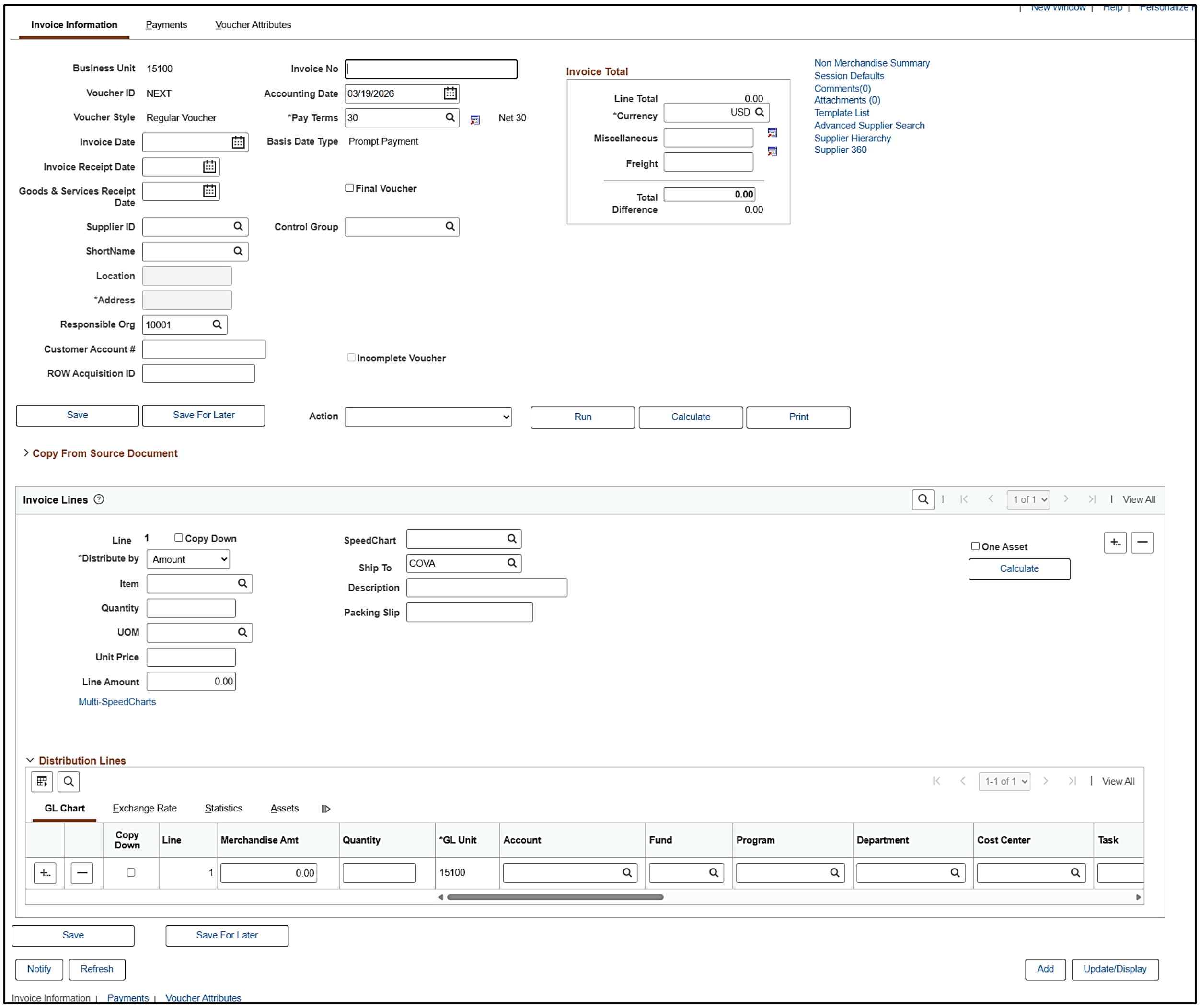
</td></tr>
<tr><td></td><td>Users can also access the Voucher page using the following navigation path:

NavBar > Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry</td></tr>
</table>

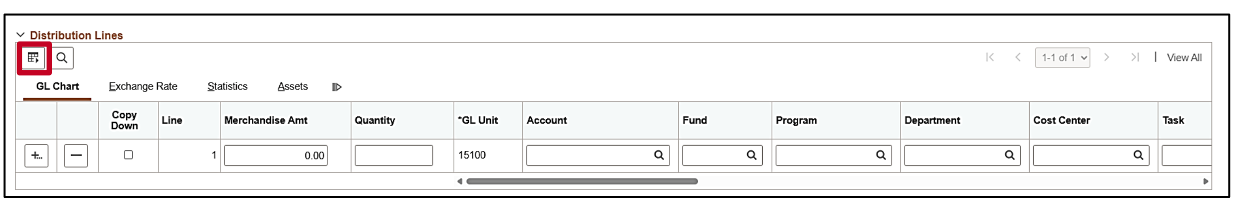
Step	Action
	The **Voucher Add a New Value** page displays. 
3.	Click the **Add** button. 

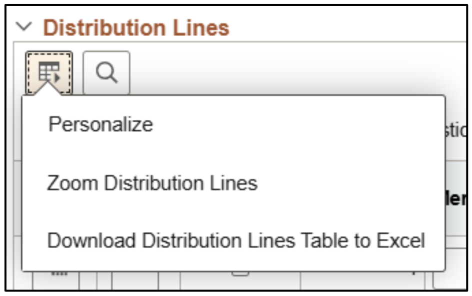
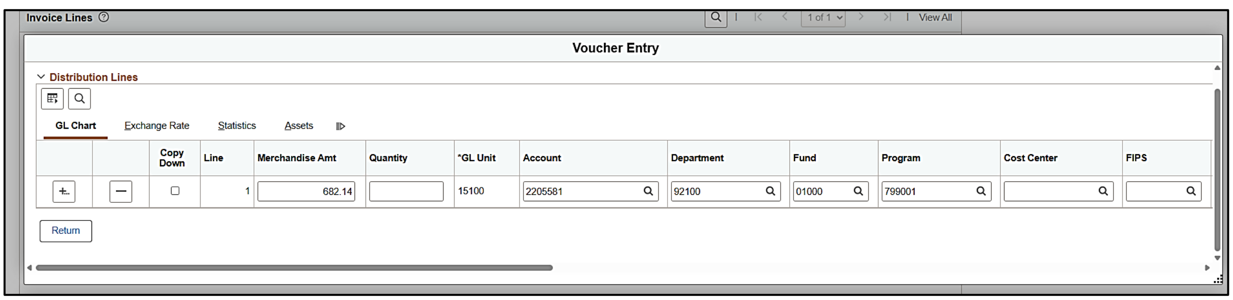
Step	Action

The **Invoice Information** page displays.

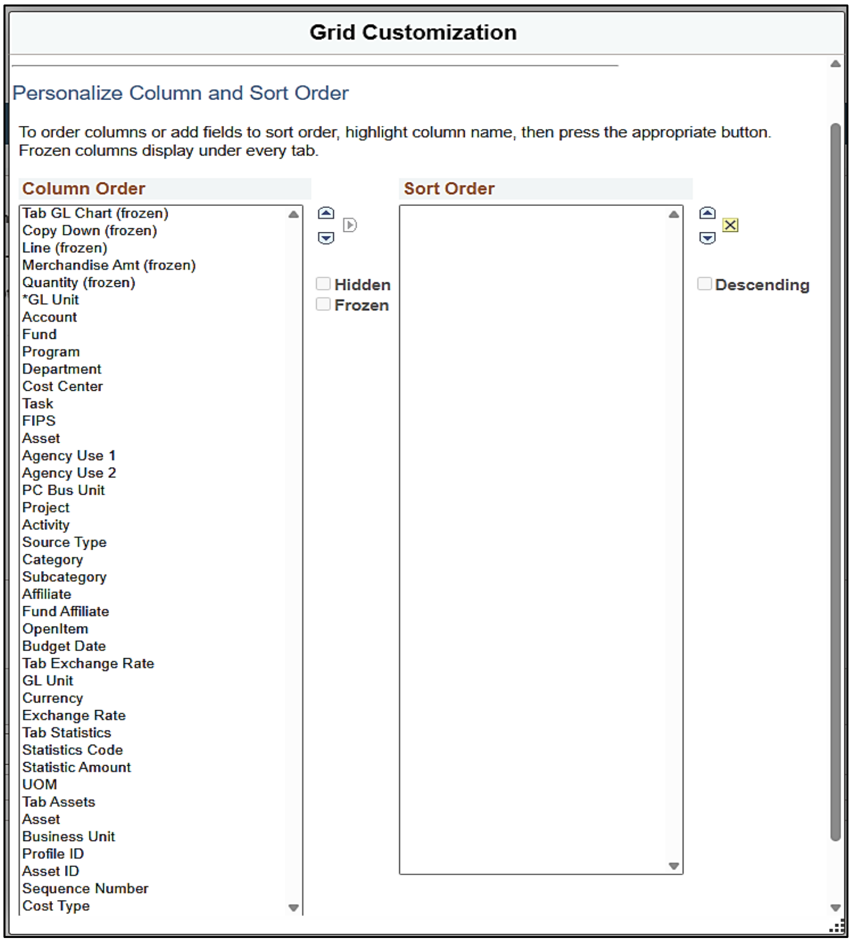
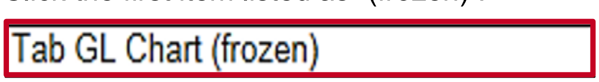


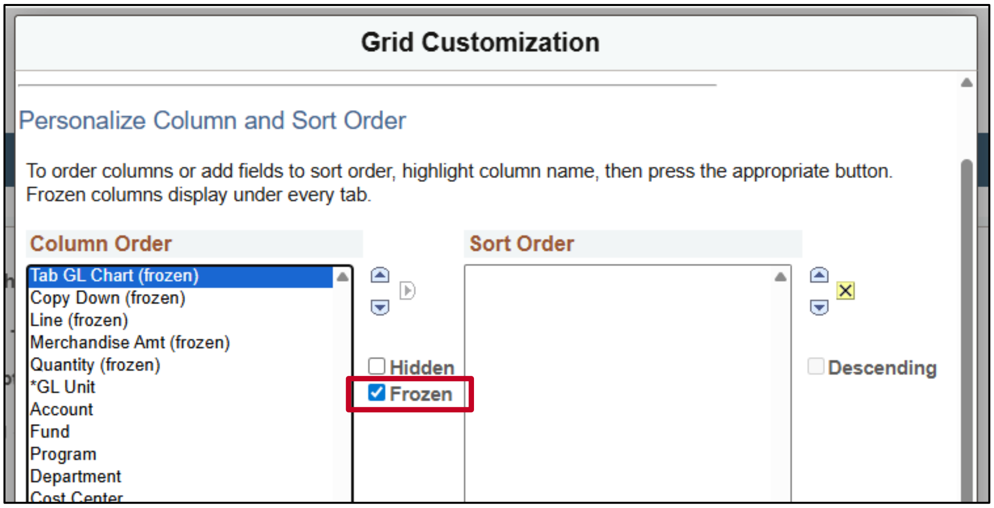
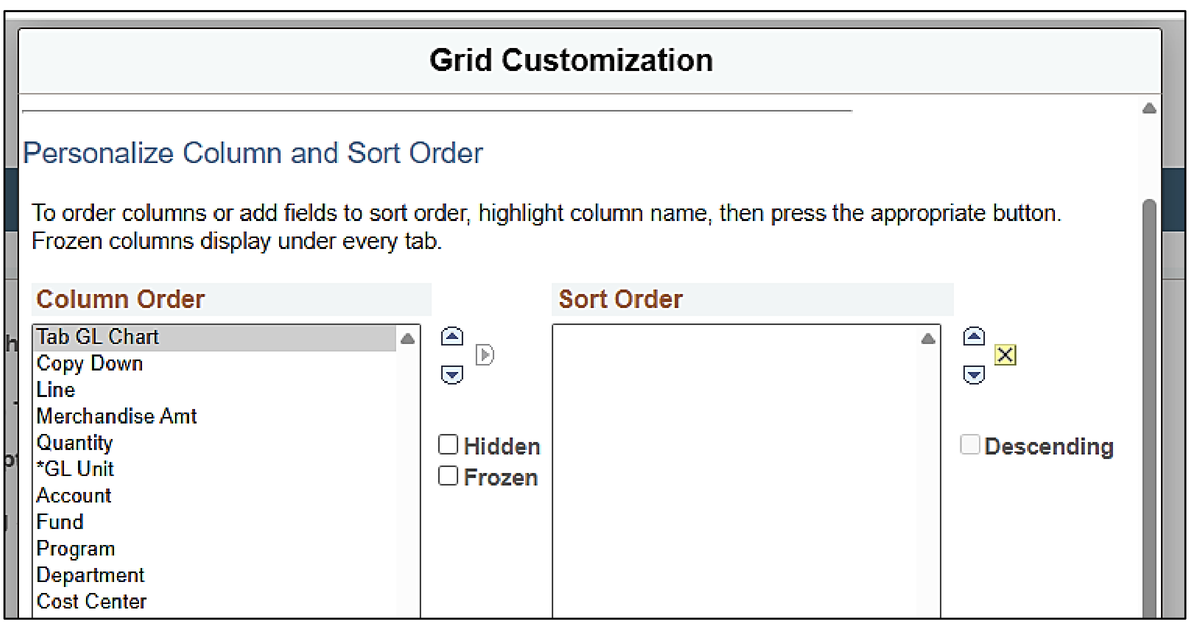
4. Click the **Grid Actions Menu** button in the **Distribution Lines** section.

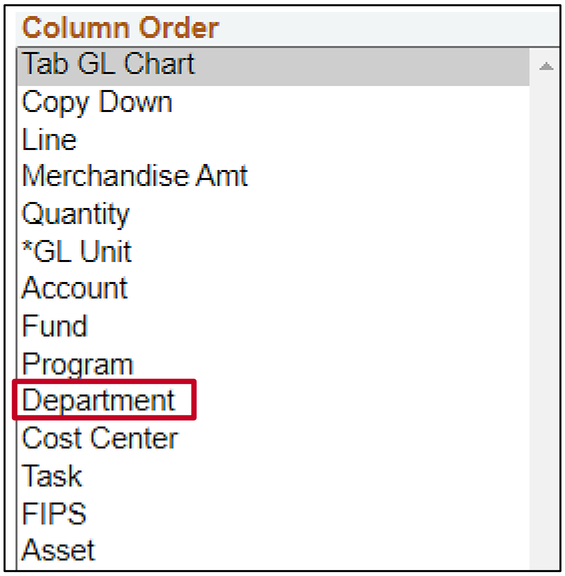
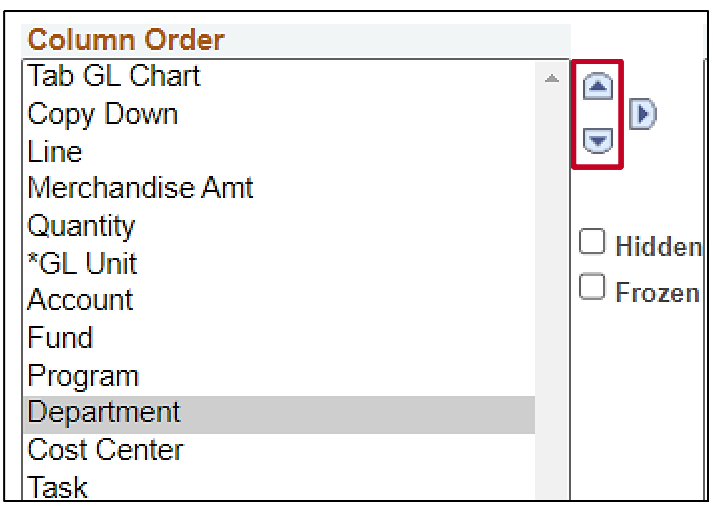
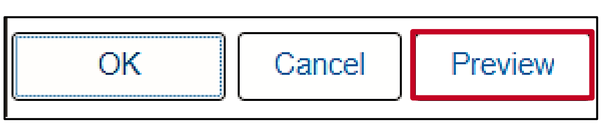


<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Grid Action Menu options display.

</td></tr>
<tr><td></td><td>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

</td></tr>
<tr><td>5.</td><td>Select the Personalize option.

</td></tr>
</table>

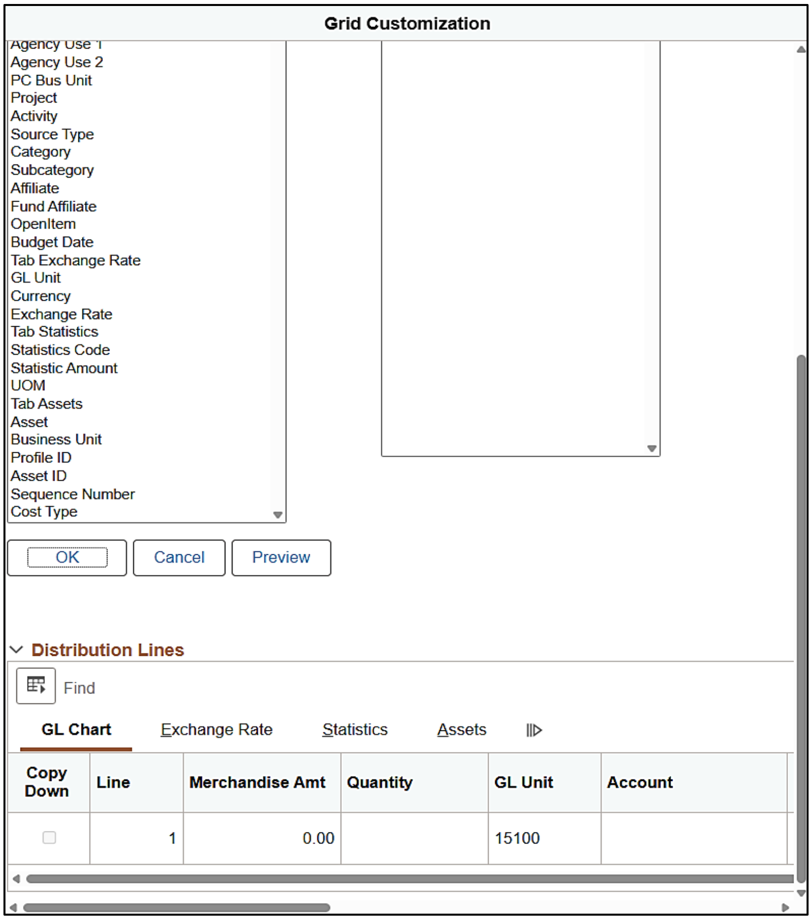
Step	Action
	The **Grid Customization** page displays in a pop-up window. 
	To change the order of the fields in the **Distribution Lines** section, use the **Column Order** side of the page.
6.	Review to see if any fields display as "(frozen)". If any display as "(frozen)", proceed to the next step.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

Step	Action
	A checkmark displays in the **Frozen** checkbox option. 
8.	Select the **Frozen** checkbox option to remove the "(frozen)" from all items in the list. 
	The page refreshes and the fields are no longer displayed "(frozen)". 

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. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">

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



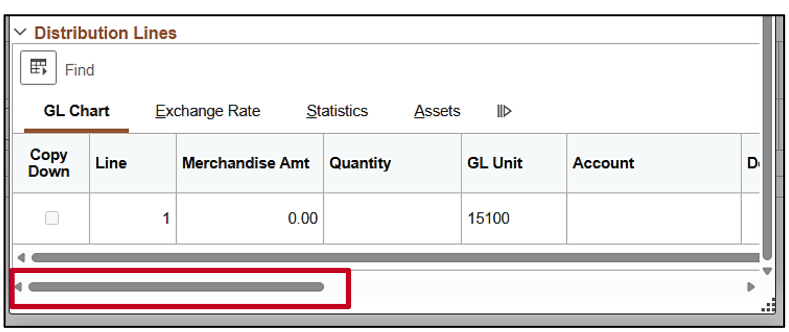
</td></tr>
<tr><td>

</td><td>

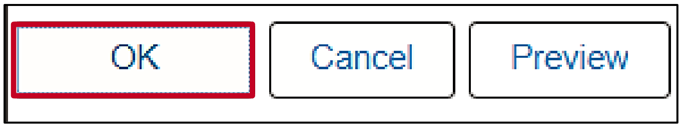
Users may see a **Copy Settings** link display at the bottom of the page. It is not used in Cardinal.

</td></tr>
<tr><td>10.</td><td>

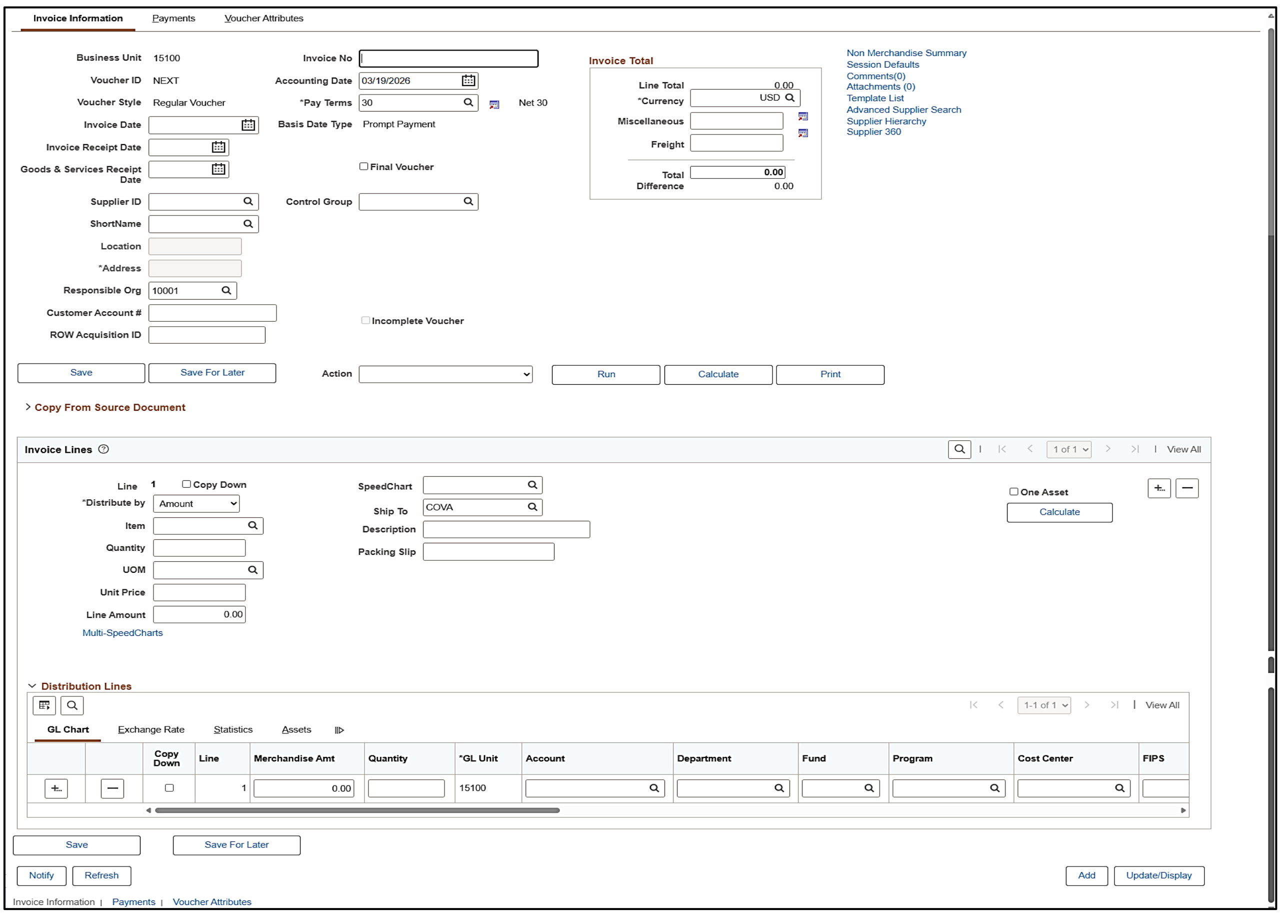
Use the scrollbar to see a preview the **Distribution Lines** based on the changes that were made.



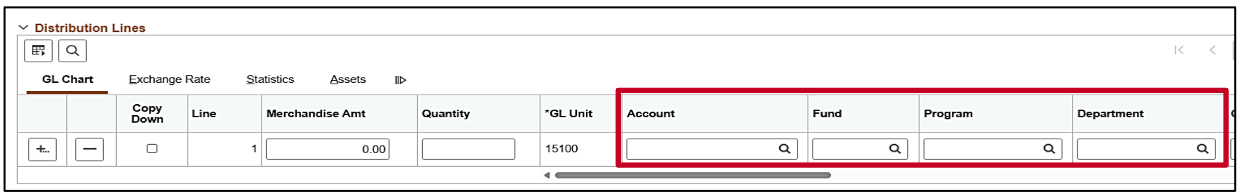
</td></tr>
</table>

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 redisplays with the applicable changes.



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: