Using Multiple SpeedCharts on an Invoice Line Overview

A SpeedChart is a shorthand key that auto-populates some ChartFields in one or more accounting distribution fields. Cardinal allows the use of a single or multiple SpeedCharts on a single Voucher Invoice Line.

Using the multiple SpeedChart feature, allows users to split the cost of a Supplier's goods/services between two or more departments, cost centers, etc.

Users can add new Distribution Line(s) or overwrite existing Distribution Line(s) using SpeedCharts.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the processes within this Job Aid. This "Notify" functionality is not currently turned on to send emails notifications to specific users within Cardinal.

Table of Contents

Revision History

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

Using the Multiple SpeedCharts Options

When using the **Multiple SpeedCharts** page, there are some key fields which are:

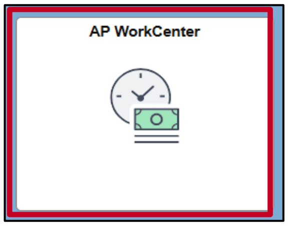
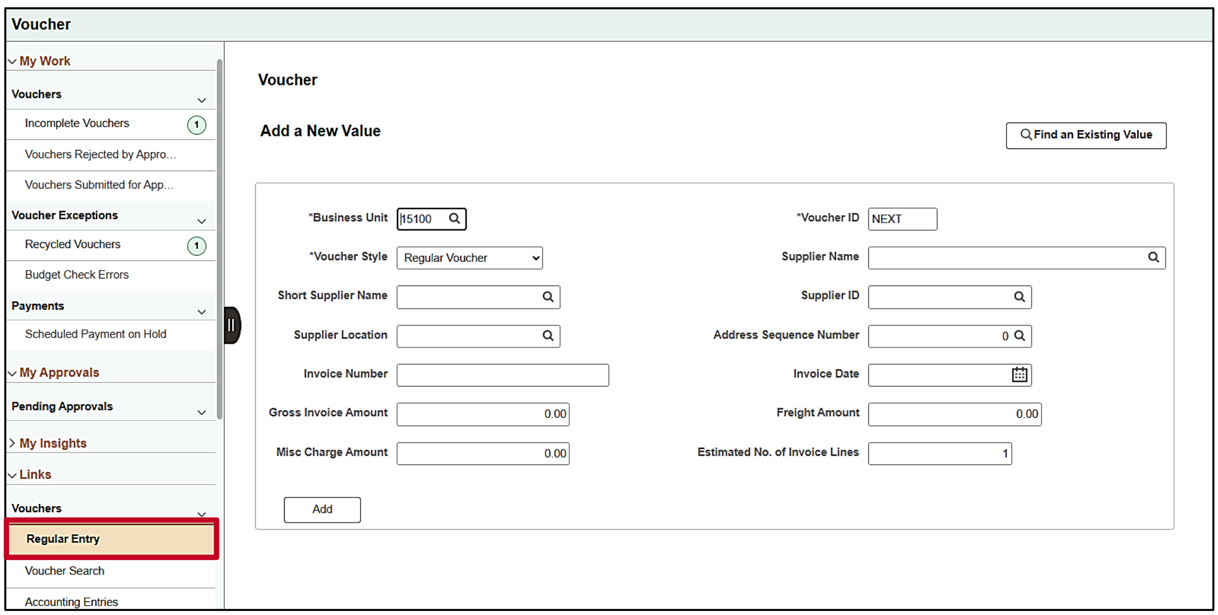
- **Invoice Line Amount**: This field displays the total amount of the Invoice.
- **Remaining Amount**: This field is calculated by summing the Merchandise Amounts on the existing Distribution Lines and subtracting that amount from the Invoice Line Amount. This calculation is performed for each Line added to this page and displays the remaining balance for the Invoice Line.
- **SpeedChart Key**: This field is used to enter each specific SpeedChart for cost distribution.
- **Amount to Distribute**: This field is used to list the specific amount to be charged to each SpeedChart Key that is entered.

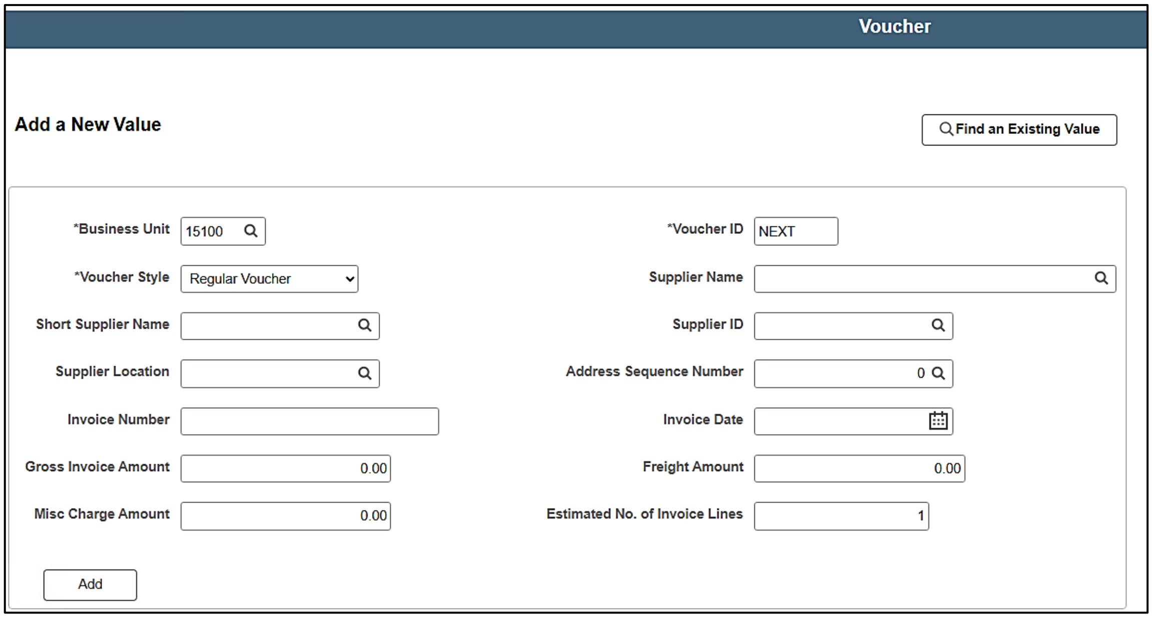
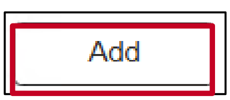
These fields impact the entry of the **SpeedCharts Process Options** which are “Append” and “Overwrite”.

- When “Append” is selected, the “Amount to Distribute” for each Line added cannot exceed the “Remaining Amount”. If there is not enough “Remaining Amount” (e.g., Remaining Amount equals 0.00), the user must adjust the amounts on the Distribution Lines on the **Invoice Information** page prior to adding new Lines via the **Multiple SpeedCharts** page.

- When “Overwrite” is selected, the sum of the “Amount to Distribute” for all lines on the **Multiple SpeedCharts** page cannot exceed the “Invoice Line Amount”. Users can overwrite existing Distribution Lines with new Lines that total or are equal to, but not greater than, the Invoice Line total.

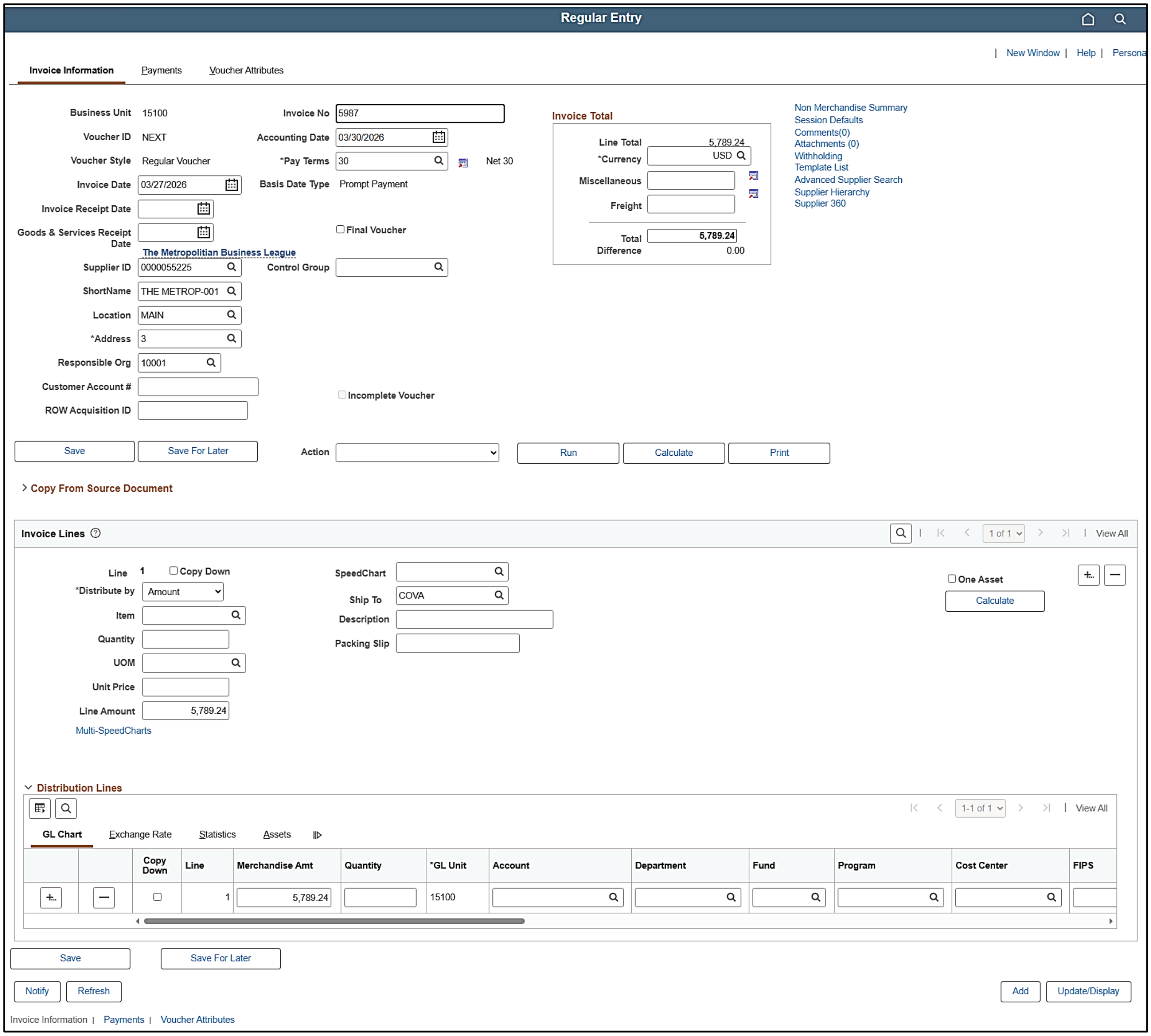
Append (add) a SpeedChart Distribution using Multiple SpeedCharts

Step	Action
1.	Navigate to the **Regular Entry** 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 **Regular Entry** page using the following navigation path: **NavBar > Menu > Accounts Payable > Vouchers > Regular Entry**

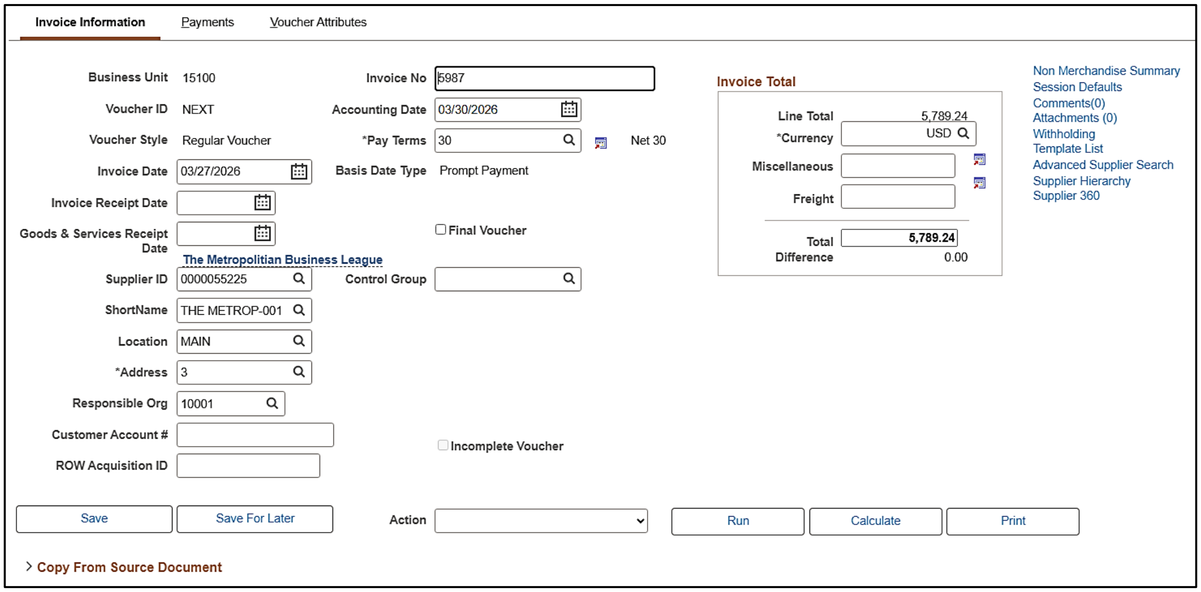
Step	Action
	The **Voucher Add a New Value** page displays. 
3.	Complete the **Voucher** page based on the Invoice. For details about entering a Voucher, see the Job Aid titled **AP312 Reviewing Supplier Information and Entering a Voucher**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.
4.	Click the **Add** button. 

Step	Action

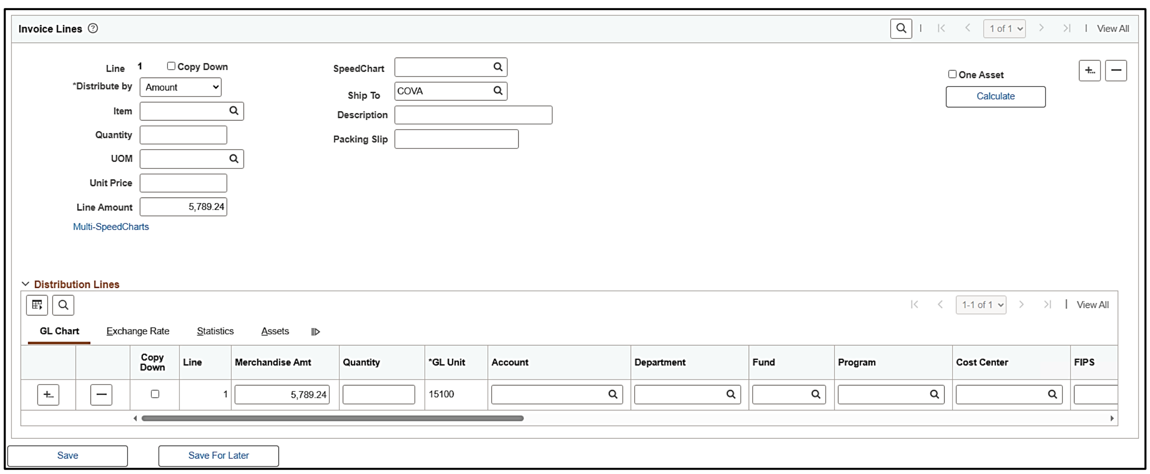
The **Invoice Information** page displays.



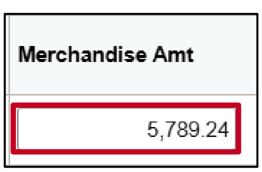
Step	Action
5.	Enter the applicable information in the **Header** section of this page based on the Invoice.



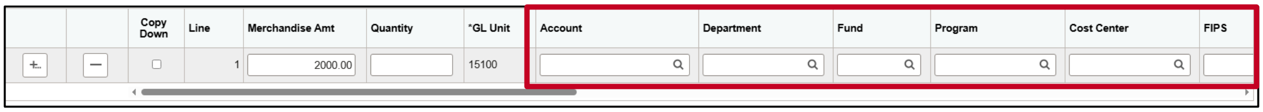
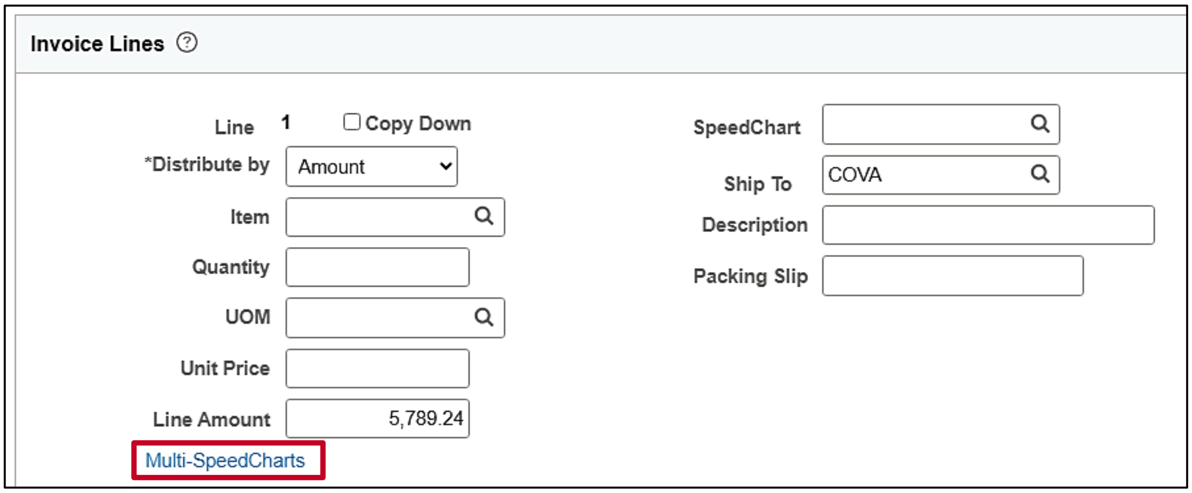
Step	Action
6.	Scroll down to the **Invoice Lines** section of the page.



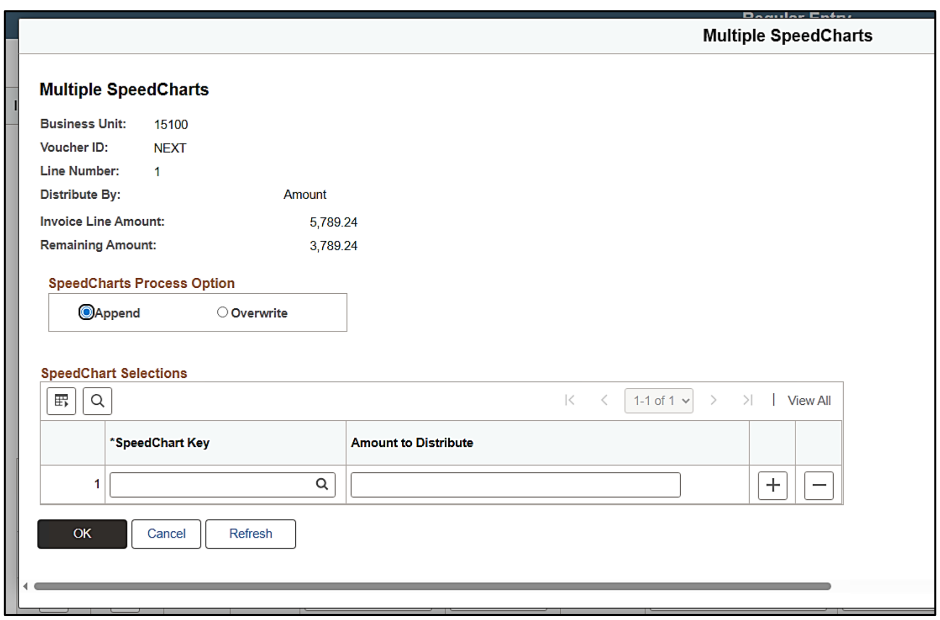
Step	Action
7.	Enter the amount being charged to the specific distribution in the **Merchandise Amt** field in the **Distribution Lines** section of the page.

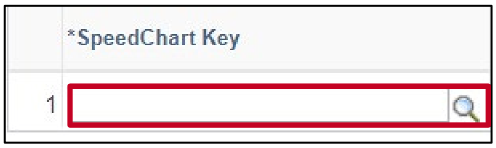
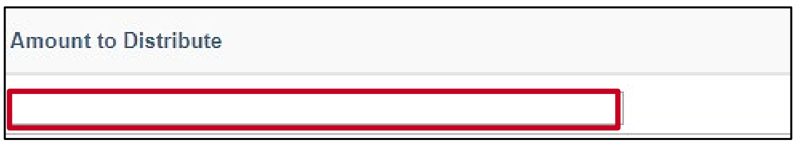
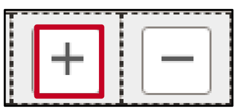
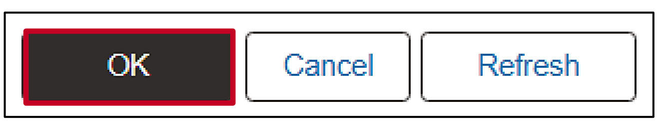


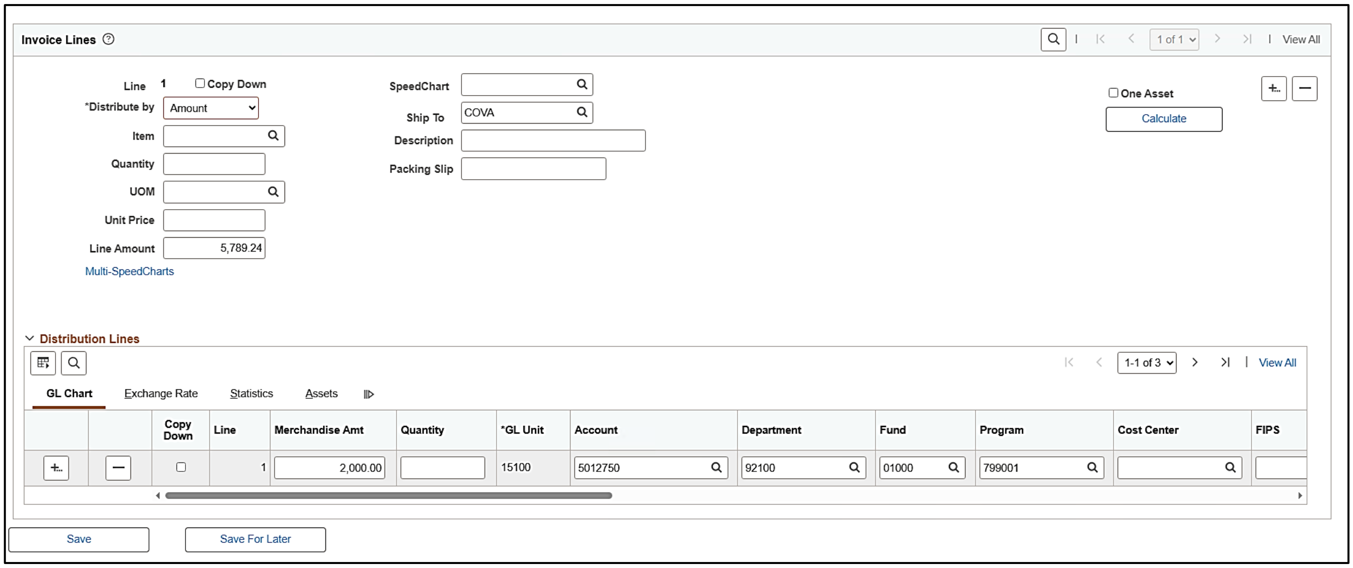
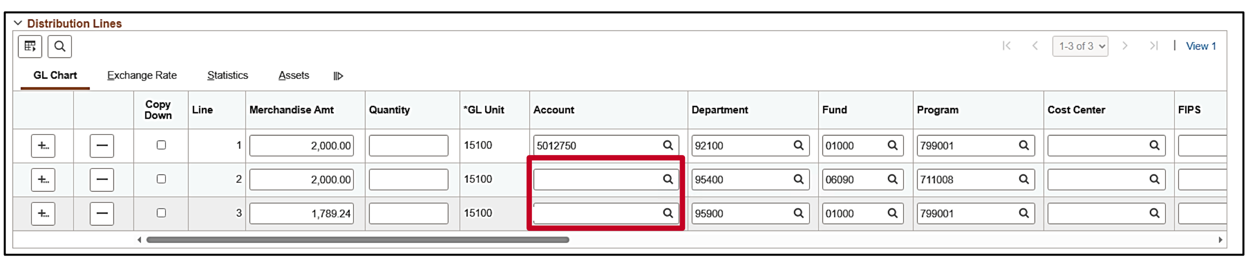
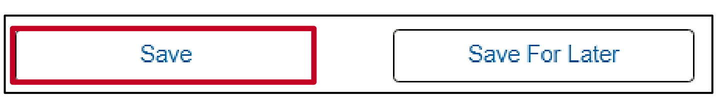
ℹ	The full amount of the Invoice populates in this field. Update as needed.

Step	Action
8.	Enter the charge distribution information as applicable. 
9.	Click the **Multi-SpeedCharts** link in the **Invoice Lines** section. 

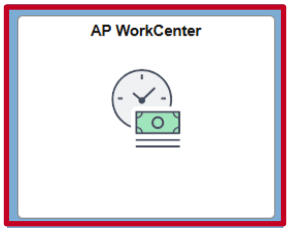
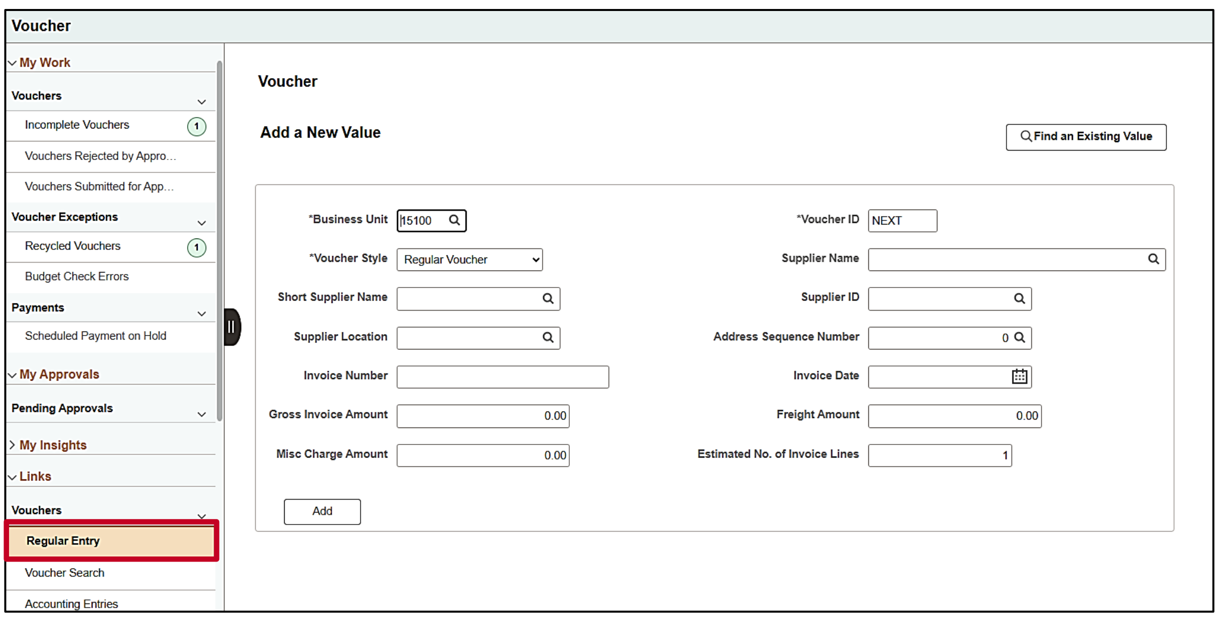
The **Multiple SpeedCharts** page displays in a pop-up window.

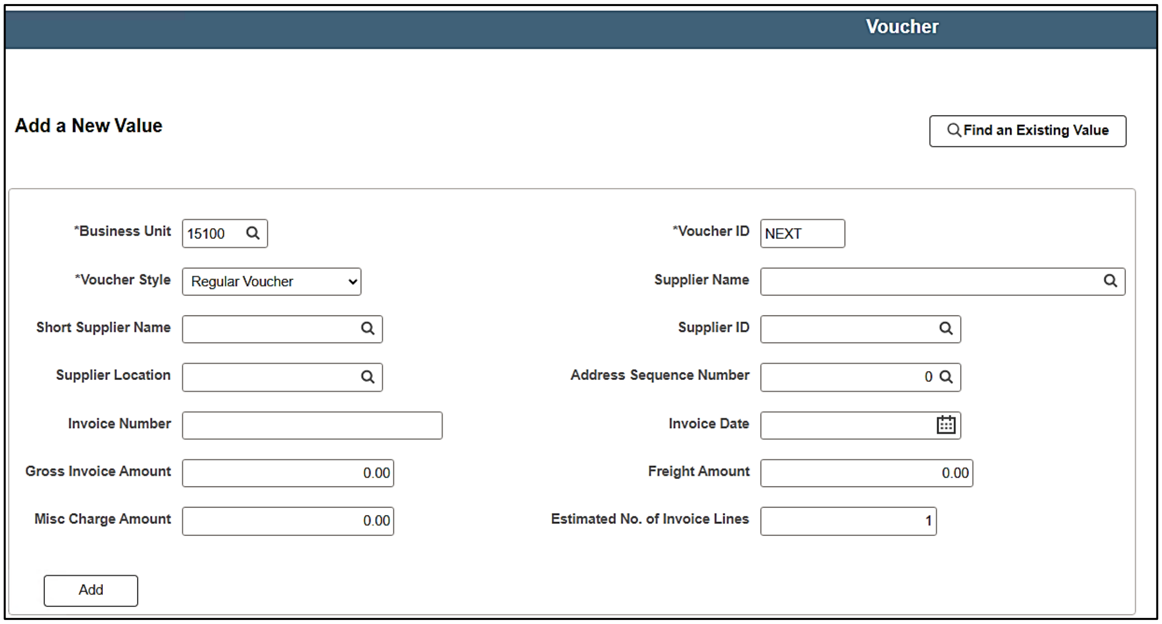


Step	Action
	In the **SpeedCharts Process Option** section, the “Append” radio button option defaults as selected. Do not change. When using the “Append” option, the total entered on this page cannot exceed the total displayed in the **Remaining Amount** field on this page.
10.	Enter or select the applicable SpeedChart in the **SpeedChart Key** field. 
11.	Enter the amount to be charged for the SpeedChart in the **Amount to Distribute** field. 
12.	Click the **Add Row** (**+**) icon to add an additional row. 
13.	Repeat **Steps 9 - 12** until all SpeedCharts and amounts have been entered.
14.	Click the **OK** button to return to the **Invoice Information** page. 

Step	Action
	The **Invoice Information** page redisplays. 
15.	Click the **View All** link in the **Distribution Lines** section to see all the Distribution Lines for the Voucher. 
16.	Enter any additional fields that are required to complete the distribution for the SpeedChart(s) entered. For this scenario, the **Account** field must be completed. 
17.	Complete any other required fields for the Voucher.
18.	Click the **Save** button. 

Overwrite (replace) a SpeedChart Distribution using Multiple SpeedCharts

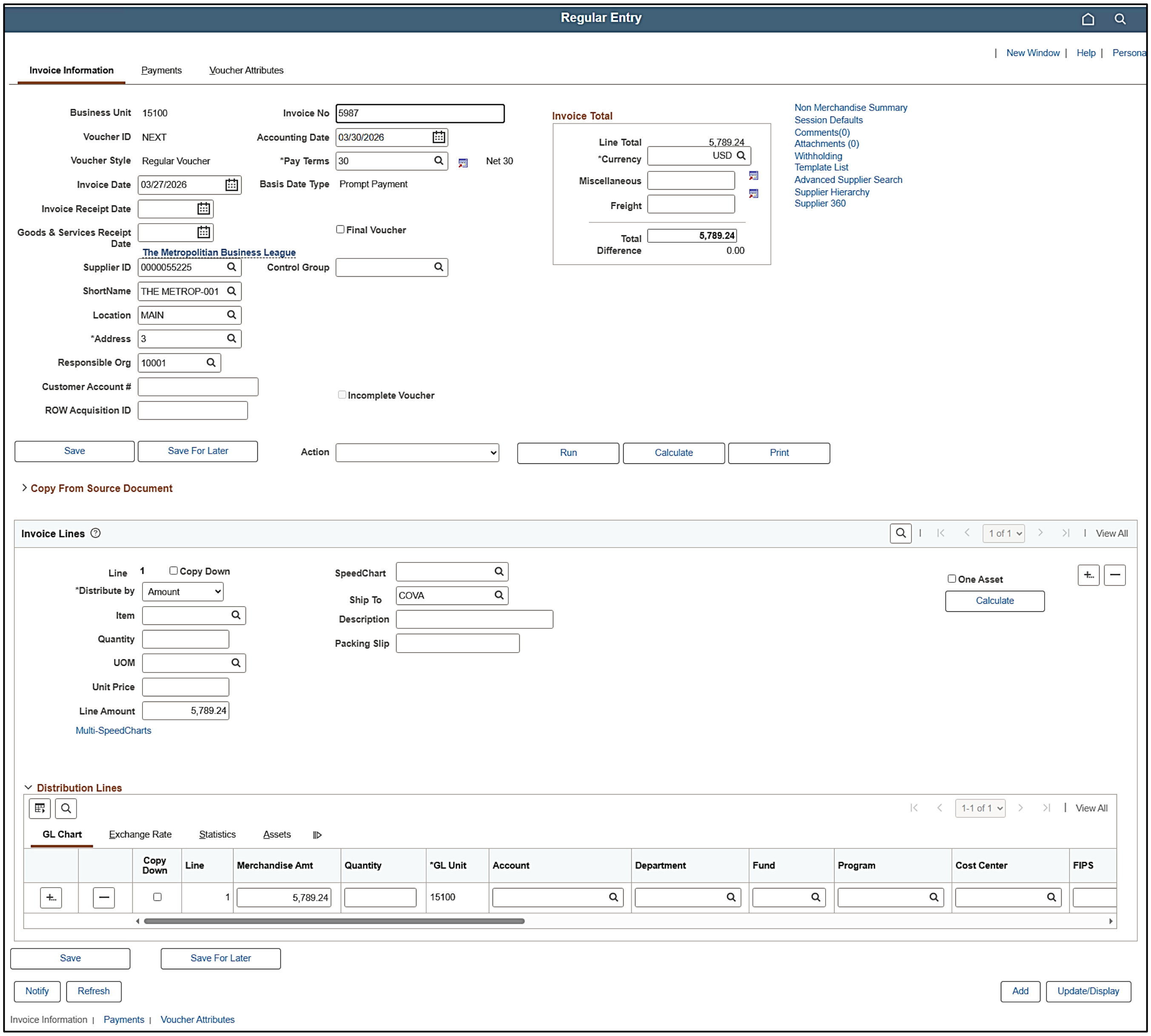
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Navigate to the Regular Entry page by clicking the AP WorkCenter tile on the Cardinal Financials Homepage.

</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 Regular Entry page using the following navigation path:
NavBar > Menu > Accounts Payable > Vouchers > Regular Entry</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Voucher Add a New Value page displays.

</td></tr>
<tr><td>3.</td><td>Complete the Voucher page based on the Invoice.

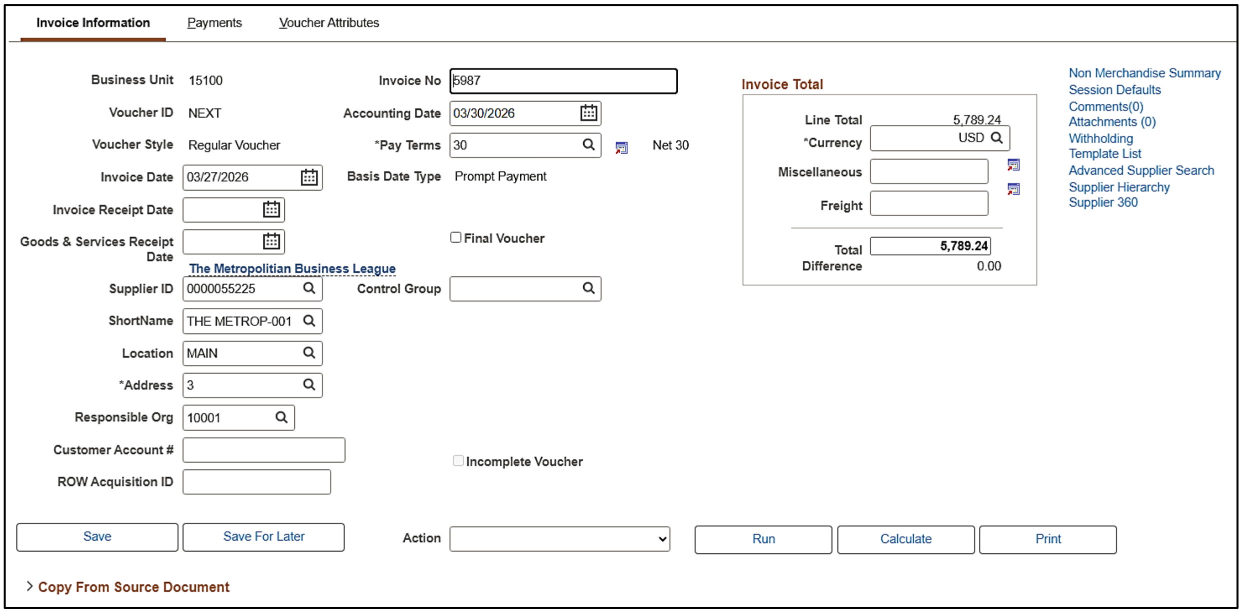
For details about entering a Voucher, see the Job Aid titled AP312 Reviewing Supplier Information and Entering a Voucher. This Job Aid is located on the Cardinal Website in Job Aids under Learning.</td></tr>
<tr><td>4.</td><td>
</td></tr>
</table>

Step	Action

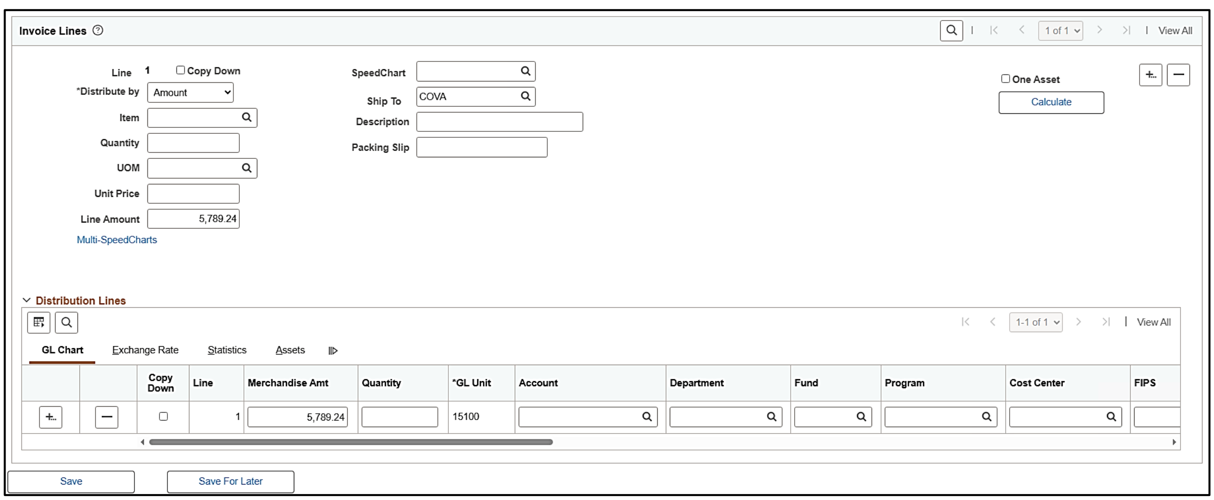
The **Invoice Information** page displays.



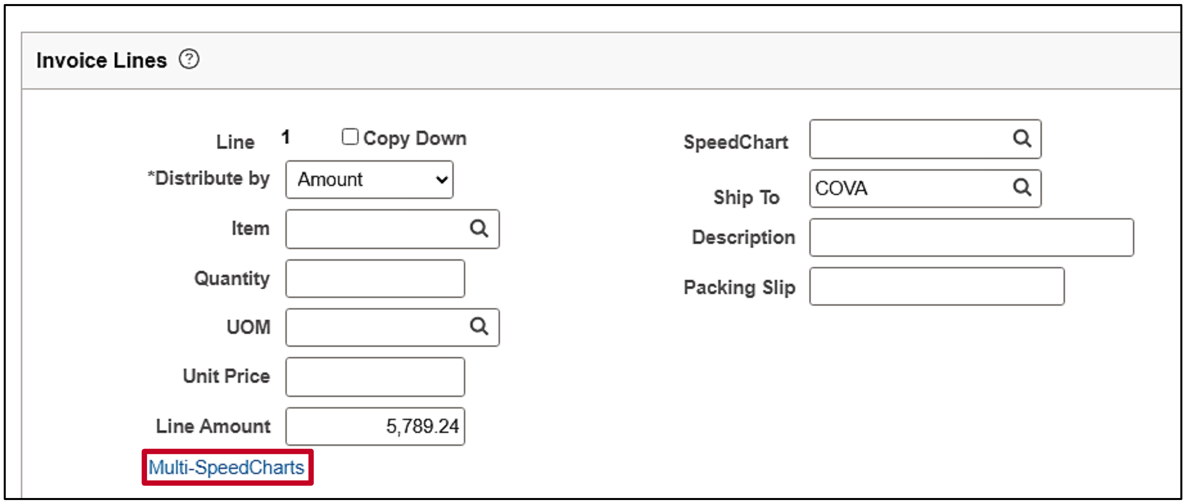
Step	Action
5.	Enter the applicable information in the **Header** section of this page based on the Invoice.

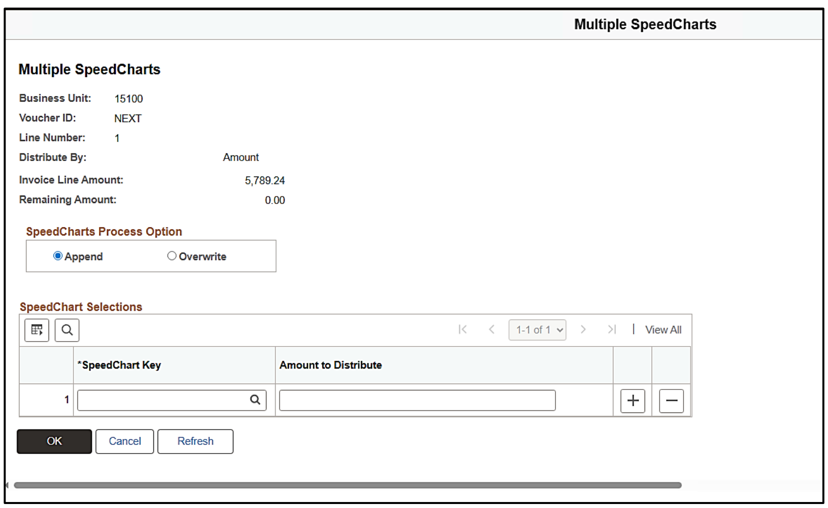


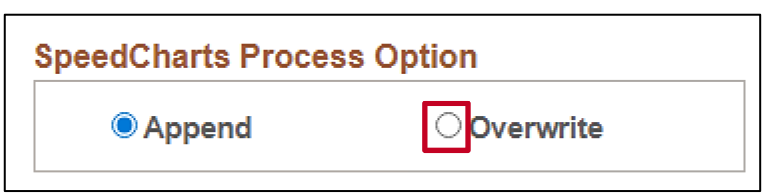
Step	Action
6.	Scroll down the page to the **Invoice Lines** section of the page.

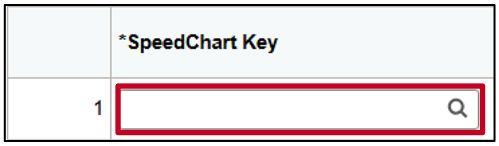
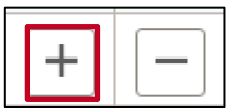
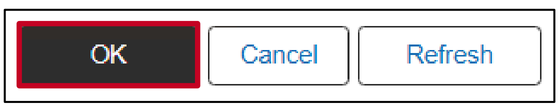


<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7.</td><td>Click the Multi-SpeedCharts link.

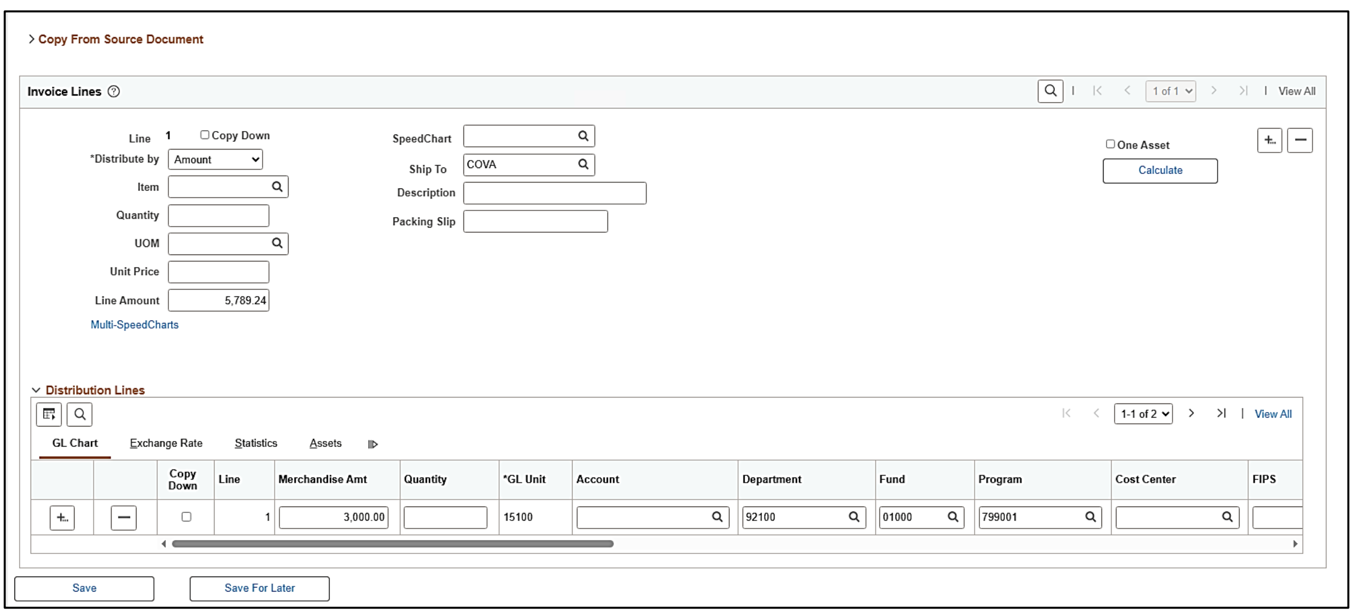

</td></tr>
<tr><td colspan="2">The Multiple SpeedCharts page displays in a pop-up window.

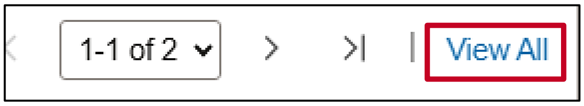
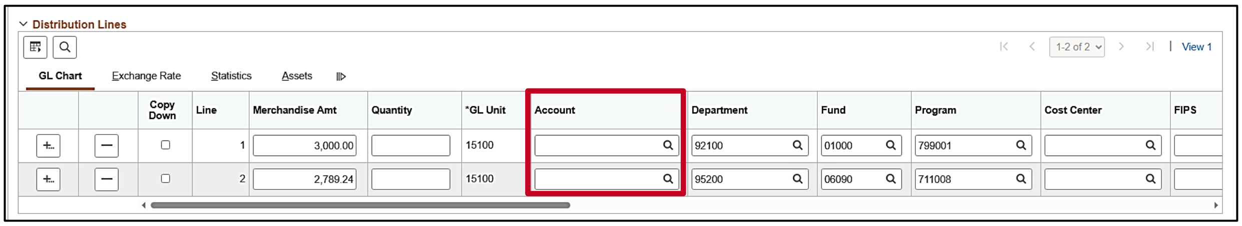

</td></tr>
<tr><td>8.</td><td>Select the Overwrite radio button option in the SpeedCharts Process Option section.


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

Step	Action
9.	Enter or select the SpeedChart in the **SpeedChart Key** field. 
10.	Enter the amount to be charged for the SpeedChart in the **Amount to Distribute** field. 
11.	Click the **Add Row** (**+**) icon to add an additional row. 
12.	Repeat **Steps 8 - 11** until all SpeedCharts and amounts have been entered.
13.	Click the **OK** button to return to the **Invoice Information** page. 

The **Invoice Information** page redisplays.



Step	Action
14.	Click the **View All** link in the **Distribution Lines** section to see all distributions for the SpeedCharts entered. 
15.	Enter any additional fields that are required to complete the distribution for the SpeedChart(s) entered. For this scenario, the **Account** field must be completed. 
16.	Complete any other required fields for the Voucher as applicable.
17.	Click the **Save** button.