



Process Document Financials 9.0: Customize JE ChartField Order

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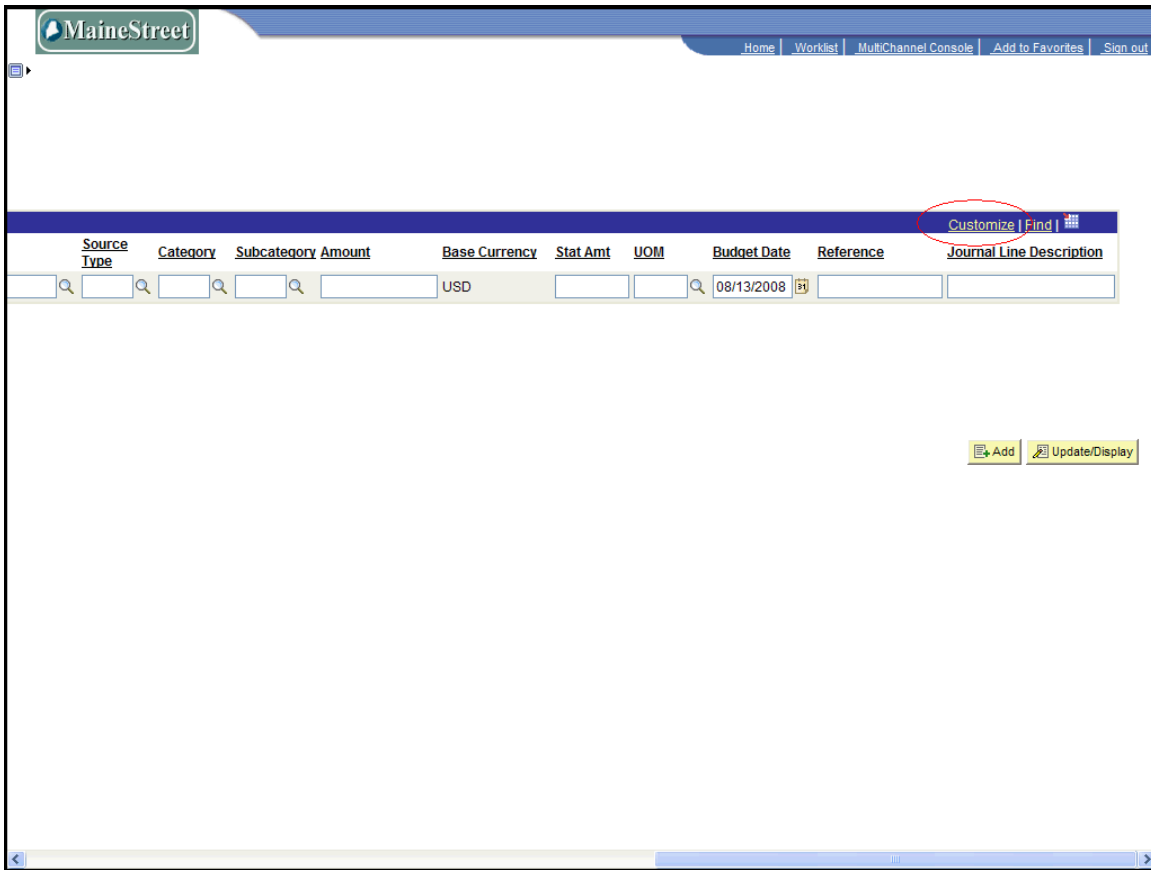
Customize JE ChartField Order

Procedure

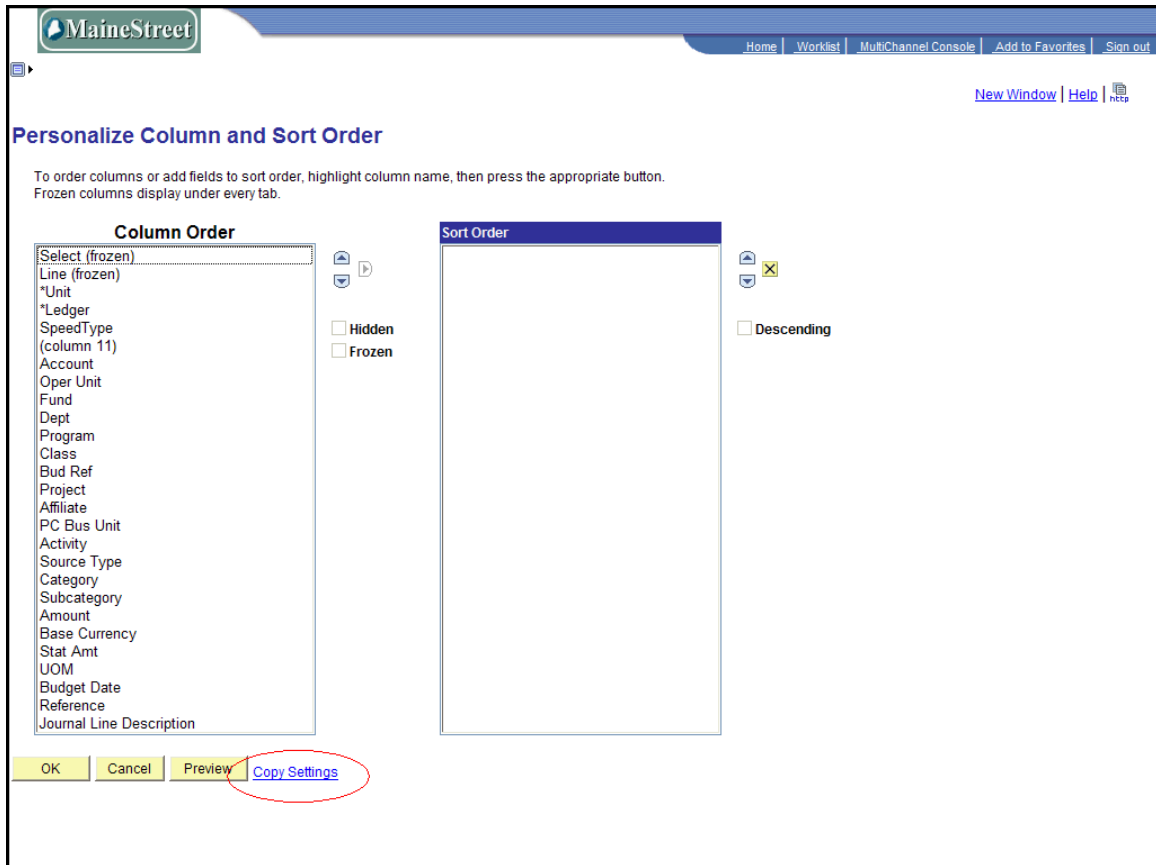
Step	Action
1.	<p>The first time you open the Lines page, the chartfield order will appear according to the system default. You can customize the Lines section so only the chartfields you typically use appear in each line.</p> <p>Scroll to the far right-hand side of the page.</p>

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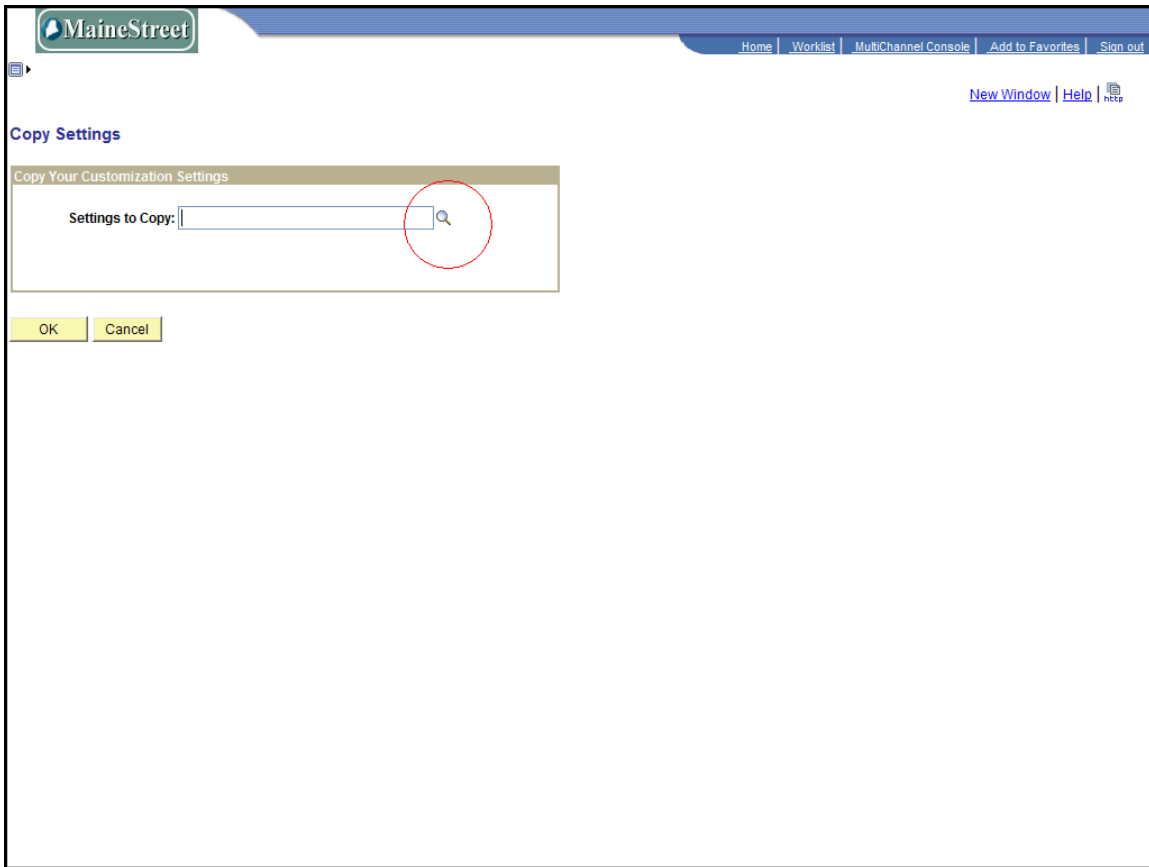
Step	Action
2.	Click the Customize link to open the Personalize Column and Sort Order page. Customize




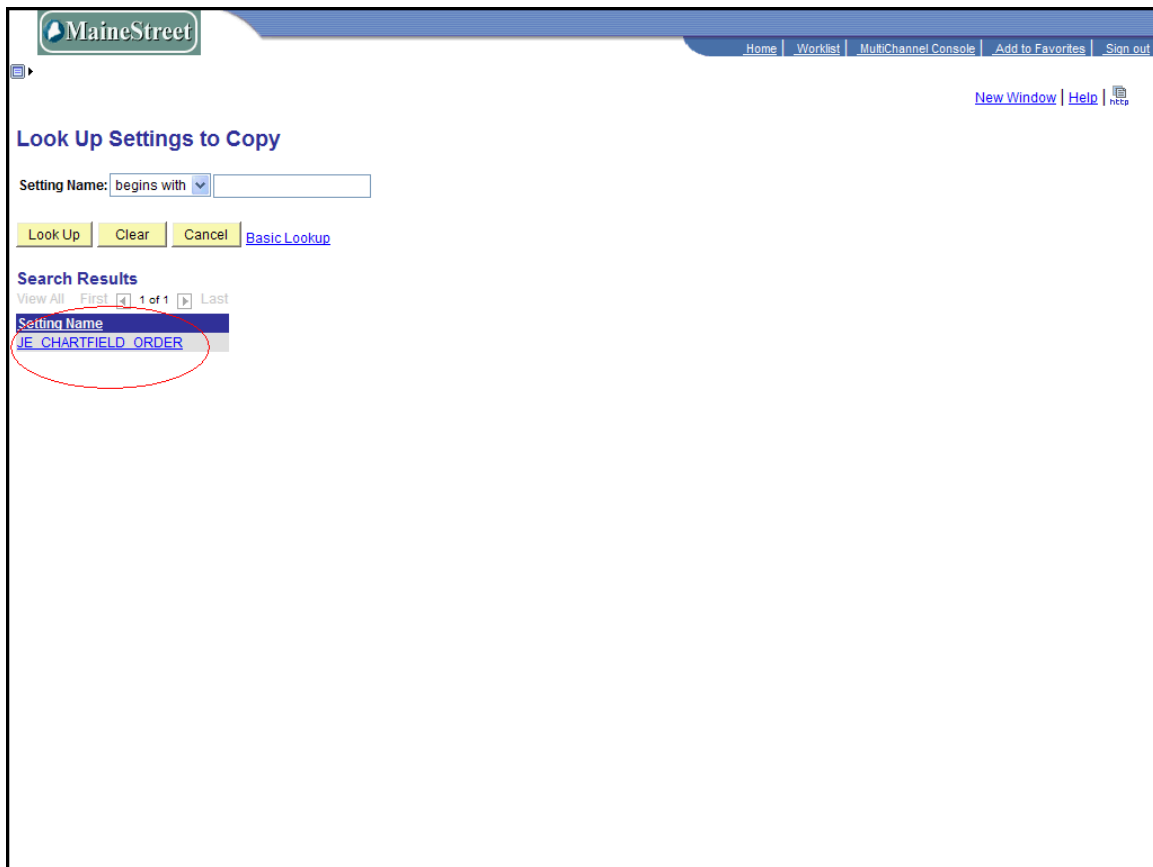
Step	Action
3.	<p>On the Personalize Column and Sort Order page, in the Column Order section, you can manually set which chartfields appear on the Lines page and in what order; Or, you can select a UMS-created ChartField template that will automatically adjust the chartfields for you. Here's how:</p> <p>Click the Copy Settings link at the bottom of the page.</p> <p>Copy Settings</p>

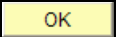
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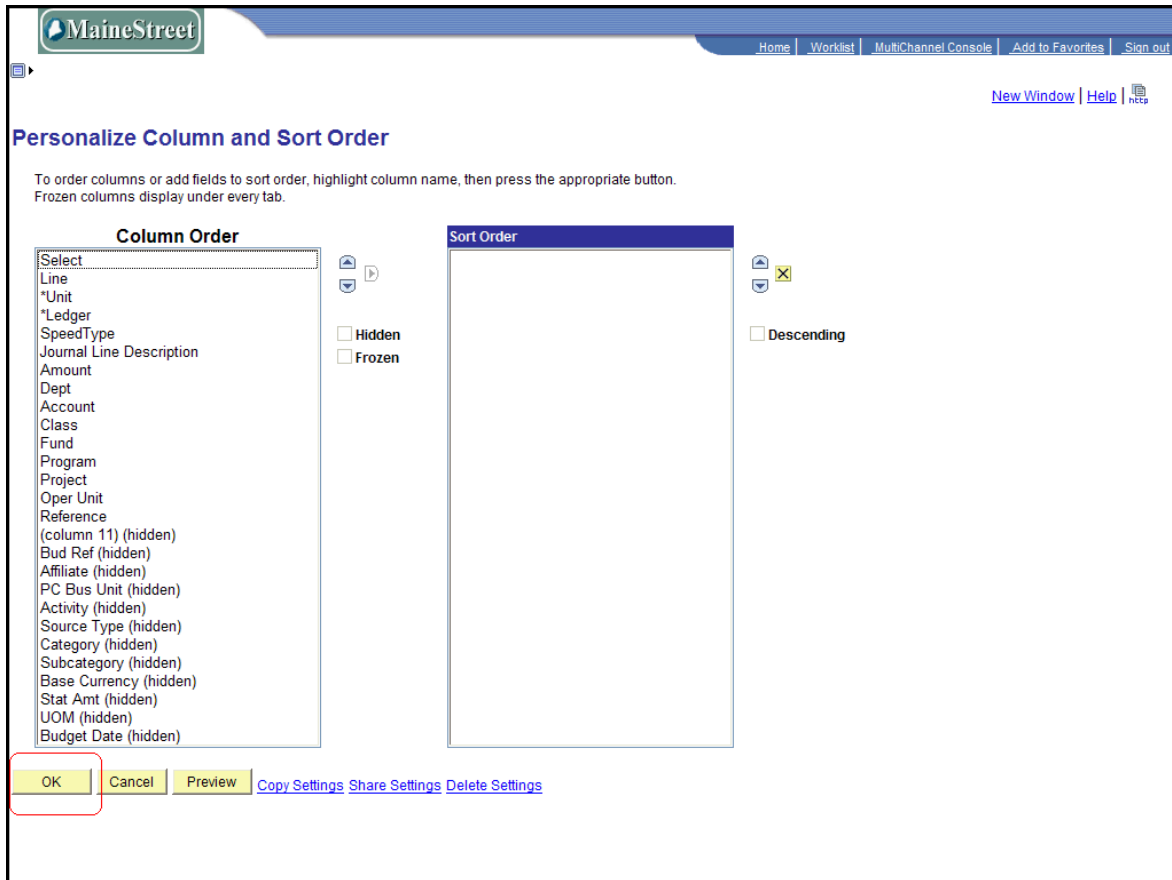
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Step	Action
4.	On the Copy Settings page, click the look up icon adjacent to the <i>Settings to Copy</i> field. 



Step	Action
5.	On the Look Up Settings to Copy page, click on JE CHARTFIELD ORDER to select it. <u>JE_CHARTFIELD_ORDER</u>
6.	Click the OK button. 



Step	Action
7.	On the Personalize Column and Sort Order page, click on the OK button to return to the Lines page. 



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Step	Action
8.	You should see that the several of the default chartfields are now hidden and the chartfields are in an order that will simplify data entry.
9.	End of Procedure.