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Purchase Line Distribution Entry

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Overview

Purchase Line Distribution Entry is a Purchase Line action that allows users to view and customize the account that will be used when posting the document. This allows users to decide how each monetary category will be applied to GL Accounts. In this document, you will learn where to access Purchase Line Distribution Entry, as well as how to change accounts. Any relevant securities and settings will be listed at the end of the document.

Usage

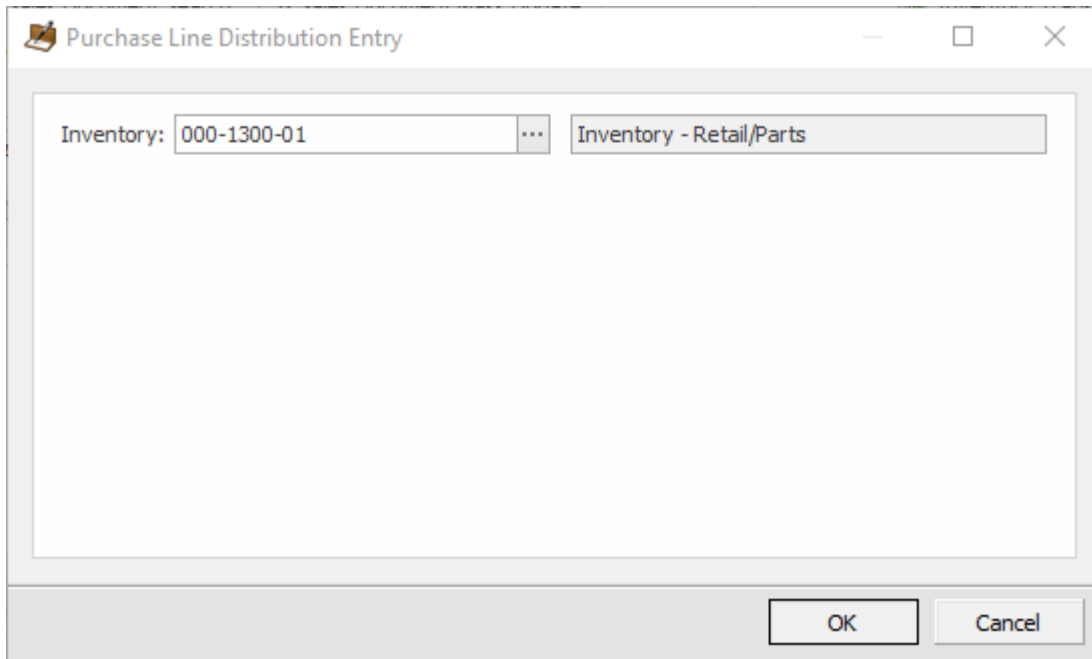
To use Purchase Line Distribution, navigate to the **Actions** dropdown on the Line Items tab of a Purchase Order.

The screenshot shows the Dynamics GP interface for a Purchase Order Search window. The window title is "(STANDARD) PO2087 - NOMEM - SalesPad". The top menu bar includes Application, CRM, Distribution BOM, Equipment Management, Inventory, Purchasing, Reporting, Sales, and Setup / Utilities. The 'Purchasing' menu is expanded, showing options like Sales Documents, Counter Sales, Sales Document Mass Update, Sales Batch Processing, Inventory Lookup, Inventory Transfers, and Sales Transfers. The 'Line Items' tab is selected, displaying a table with one item: HD-20, 20 Gig Hard Drive. The 'Actions' dropdown menu is open, showing options like New, Cancel, Insert, and Purchase Line Distribution Entry. The 'Purchase Line Distribution Entry' option is highlighted.

Click the Purchase Line Distribution Entry action.

The screenshot shows the 'Configure Actions...' dialog box. The dialog box has a title bar 'Configure Actions...' and a list of actions. The 'Purchase Line Distribution Entry' action is selected.

This will open up the Purchase Line Distribution Entry window:

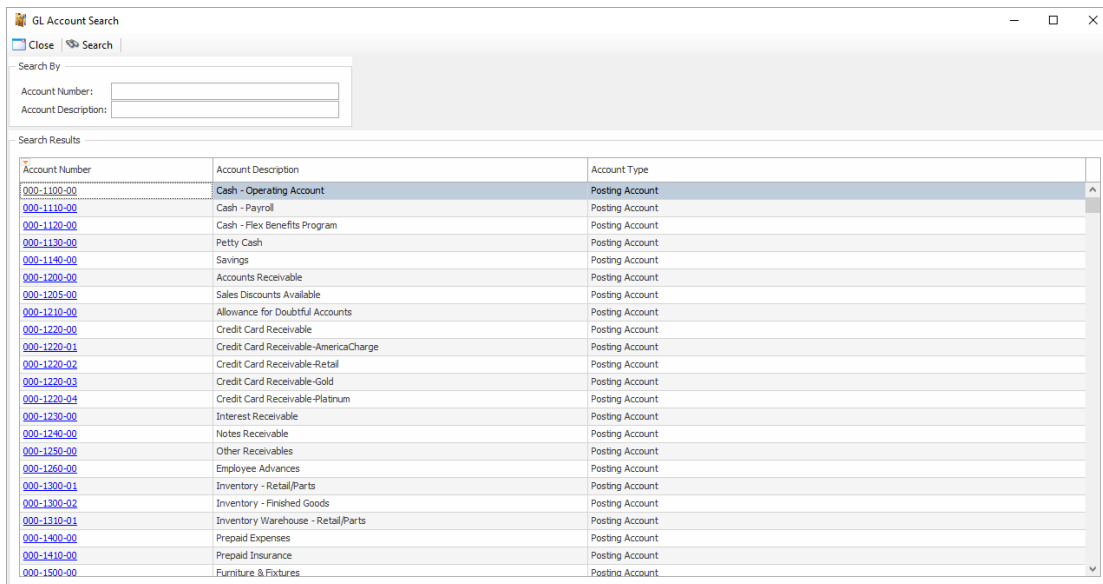


The screenshot shows a window titled "Purchase Line Distribution Entry". It features a text field labeled "Inventory:" containing the account number "000-1300-01". To the right of this field is an ellipsis (...) button. Further right is a text field containing the account description "Inventory - Retail/Parts". At the bottom right of the window are two buttons: "OK" and "Cancel".

Changing the Accounts

To change the account, you may type the account number in yourself, or you can click the ellipsis (...) on the right of the field to open up the GL Account Search window. Clear out the Account Number field and enter the account number you want to find, then click the **Search** button. If you search without anything in the Account Number field, it will pull up all of the accounts in your system.

Note: Accounts must exist in GP, they cannot be created in SalesPad.



The screenshot shows a window titled "GL Account Search". It has a "Close" button and a "Search" button. Below these are two input fields: "Account Number:" and "Account Description:". The "Search Results" section contains a table with three columns: "Account Number", "Account Description", and "Account Type".

Account Number	Account Description	Account Type
000-1100-00	Cash - Operating Account	Posting Account
000-1110-00	Cash - Payroll	Posting Account
000-1120-00	Cash - Flex Benefits Program	Posting Account
000-1130-00	Petty Cash	Posting Account
000-1140-00	Savings	Posting Account
000-1200-00	Accounts Receivable	Posting Account
000-1205-00	Sales Discounts Available	Posting Account
000-1210-00	Allowance for Doubtful Accounts	Posting Account
000-1220-00	Credit Card Receivable	Posting Account
000-1220-01	Credit Card Receivable-AmericaCharge	Posting Account
000-1220-02	Credit Card Receivable-Retail	Posting Account
000-1220-03	Credit Card Receivable-Gold	Posting Account
000-1220-04	Credit Card Receivable-Platinum	Posting Account
000-1230-00	Interest Receivable	Posting Account
000-1240-00	Notes Receivable	Posting Account
000-1250-00	Other Receivables	Posting Account
000-1260-00	Employee Advances	Posting Account
000-1300-01	Inventory - Retail/Parts	Posting Account
000-1300-02	Inventory - Finished Goods	Posting Account
000-1310-01	Inventory Warehouse - Retail/Parts	Posting Account
000-1400-00	Prepaid Expenses	Posting Account
000-1410-00	Prepaid Insurance	Posting Account
000-1500-00	Furniture & Fixtures	Posting Account

Security and Application Settings

Security

*Purchase Line Distribution Entry** - Allows users to see and use the Purchase Line Distribution Entry action.

Note: Securities with an asterisk (such as *Purchase Line Distribution Entry*) have sub-securities that are listed in the middle section of the Security field. Sub-security descriptions appear in the bottom section of the field. Review and customize these as desired.

Application Settings

Enable SalesPad Desktop Distributions - Allows users to use SalesPad for distributions. Defaults to False.

NOTE: This setting will disable Econnect distributions for all transactions. This means that all distributions for

all transactions would need to be set manually or through other means. It is strongly recommended to TEST turning this setting on before applying it to a live environment.

GL Account Segments - Allows users to change how account numbers should be formatted in SalesPad. The default format is \d\d\d-\d\d\d\d-\d\d.