



Required and Auto Populated Description on Voucher

In this example the customer not only wants to make the description field required, but also wants to:

1. Populate it with content of the Comment 2 field on the vendor card, when a vendor is entered.
2. Change the tab sequence so the focus moves from the vendor ID field to the Description field when a vendor is entered.

Vendor Master Record:

This is the vendor with an entry in the Comment 2 field.

The screenshot shows a 'Vendor Maintenance' window with the following data:

Vendor ID	CARLSONS0001	Status:	Active
Name	Carlson Specialties	Class ID	USA-US-M
Short Name	Carlson Special		
Check Name	Carlson Specialties		
Primary Address:			
Address ID	4567 ORCHARD LN	Phone 1	(312) 555-0115 Ext. 0000
Contact	Wendy Fabin-Carlson	Phone 2	(000) 000-0000 Ext. 0000
Address	4567 Orchard Lane	Phone 3	(000) 000-0000 Ext. 0000
		Fax	(312) 555-0115 Ext. 0000
City	Chicago	Tax Schedule	
State	IL	Shipping Method	
ZIP Code	60607-3439	UPS Zone	
Country Code			
Country	USA		
Address IDs:			
Purchase	4567 ORCHARD LN	Vendor Account	
Remit To	4567 ORCHARD LN	Comment 1	
Ship From	4567 ORCHARD LN	Comment 2	this vendor's comment

Buttons: Options, Address, Accounts

Footer: by Vendor ID



Payables Transaction Entry before Customization:

The out-of-the-box Microsoft Dynamics GP (Great Plains) Accounts Payable Transaction Entry window has four required fields (in red). Upon data entry of a vendor invoice, notice the description field is blank.

Payables Transaction Entry

Save Delete Post Print

Voucher No. 0000000000000469 Intercompany Batch ID
 Document Type: Invoice Doc. Date 7/17/2007
 Description

Vendor ID CARLSONS0001 Currency ID Z-US\$
 Name Carlson Specialties Document Number
 Address ID 4567 ORCHARD LN P.O. Number
 Remit-To ID 4567 ORCHARD LN Shipping Method
 Payment Terms Net 30 Tax Schedule ID

Purchases	\$0.00	1099 Amount	\$0.00
Trade Discount	\$0.00	Cash	\$0.00
Freight	\$0.00	Check	\$0.00
Miscellaneous	\$0.00	Credit Card	\$0.00
Tax	\$0.00	Terms Disc Taken	\$0.00
Total	\$0.00	On Account	\$0.00

Apply Distributions Print Check

by Batch ID Status Unsaved

Payables Transaction Entry after Customization:

We now have five required fields, including Description. The tab sequencing has been modified so that upon entry of the vendor ID, the tab moves to Description. If the vendor master record (see first illustration) has text in the Comment 2 field, this will automatically be populated in the Description field. Otherwise, the accounts payable clerk must enter a description or he/she will not be able to save the transaction.

Payables Transaction Entry

Save Delete Post Print

Voucher No. 0000000000000469 Intercompany Batch ID
 Document Type: Invoice Doc. Date 7/17/2007
 Description this vendor's comment

Vendor ID CARLSONS0001 Currency ID Z-US\$
 Name Carlson Specialties Document Number
 Address ID 4567 ORCHARDLN P.O. Number
 Remit-To ID 4567 ORCHARDLN Shipping Method
 Payment Terms Net 30 Tax Schedule ID

Purchases	\$0.00	1099 Amount	\$0.00
Trade Discount	\$0.00	Cash	\$0.00
Freight	\$0.00	Check	\$0.00
Miscellaneous	\$0.00	Credit Card	\$0.00
Tax	\$0.00	Terms Disc Taken	\$0.00
Total	\$0.00	On Account	\$0.00

Apply Distributions Print Check

by Batch ID Status Unsaved