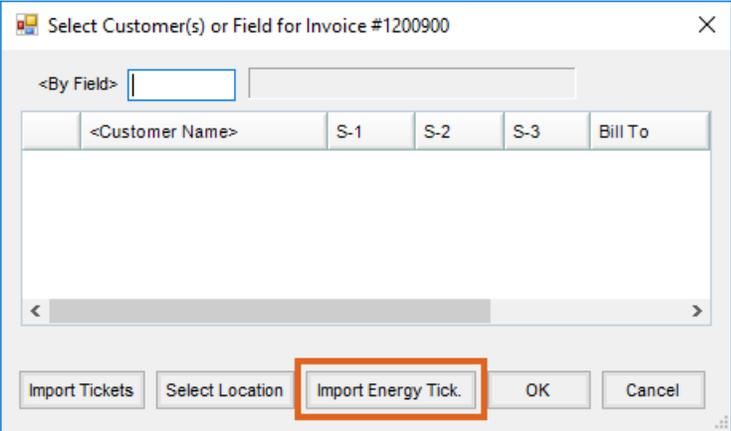


# Invoicing Energy Tickets

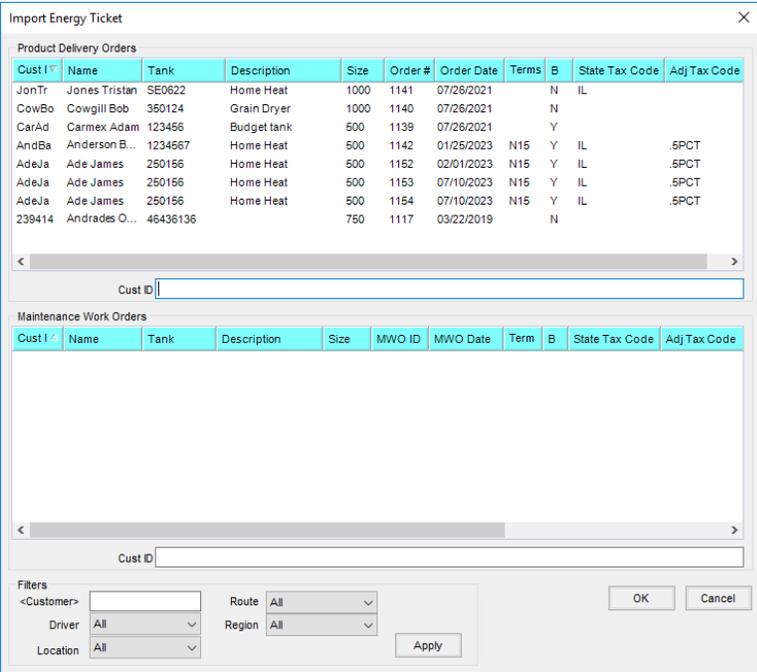
Last Modified on 01/23/2024 9:27 am CST

Invoices can be created from Energy Tickets or directly from the PDO.

Invoices from Energy Tickets are processed in the Accounting module of Agvance by selecting **Add** at *A/R / Invoice*.



**Import Energy Tick.** displays the *Import Energy Ticket* window. This window shows all Product Delivery Orders and Maintenance Work Orders created in the Energy module, having an open status, and fulfilling the selected filters. The default shows all open orders. Once the ticket is imported into an Invoice, the status on the Energy Ticket is changed to *Complete*.



The *Filters* may optionally be used to only show orders for a particular *Customer, Driver, Location, Route, or Region*. Select the information to filter, and then choose **Apply** to filter the open Energy tickets.

Highlight the ticket or tickets to be invoiced, then select **OK**.

# Importing a Single Energy Ticket

If one ticket is selected, the following *Process Energy Order* screen appears.

The screenshot shows the 'Process Energy Order' window. At the top, there is a 'Customer' field with 'AdeJa' selected and 'Ade James' displayed. Below this is a table with columns: '<Customer Name>', 'S-1', 'S-2', 'S-3', and 'Bill To'. The first row contains 'James Ade', '100.0000', and empty cells for S-2, S-3, and Bill To. Below this table is a large empty rectangular area. At the bottom of the window is another table with columns: 'Cust ID', 'Customer Name', 'Tank SN', 'Tank Description', 'Order #', 'Prod ID', 'Dept ID', '<Product>', and 'Amount'. The first row contains: 'AdeJa', 'Ade James', '250156', 'Home Heat', '1154', 'PropHH', 'Prop00', 'Propane - Home...', and '0.00'. Below this table is another large empty rectangular area. At the very bottom of the window are three buttons: 'Apply', 'OK', and 'Cancel'.

The customer displays based on the billing splits set on the tank. The tank serial number and product default from the tank.

The *Amount* populates if the order was filled by gallons. The *Amount* may be changed on this screen. If it was filled by % or dollars, *Amount* will be blank and the number of gallons delivered must be entered. This updates the *Last Delivery Amount* on the tank and populates the quantity on the Invoice.

If the tank is a scheduled delivery, the *Tank %* is required. This updates the *Last Delivery Gauge %* on the tank.

The *Truck Ticket* is optional information. This updates *Last Delivery Truck Ticket* on the tank.

*Order #*, *Current K-Factor*, and *Aux. K-Factor* are for informational purposes. The *Order #* is the Product Delivery Order number from the Energy module. *Current K-Factor* and *Aux. K-Factor* populate if the tank is marked to *Update K Factor* information (found at *File / Open / Tank Information* on the *Delivery Info* tab).

If the tank is set to *Update K Factor* and the tank has had at least two fills, selecting **Apply** calculates a new K-Factor and optionally updates the tank. If the *Update K Factor* box is checked on the tank file and the program calculates a new K Factor, the K Factor is automatically updated if the difference between the current and calculated K Factors is less than the tolerance % specified in *Energy / Setup / Preferences / K Factor Update Tolerance %*. If the difference is greater, a message displays showing the current and calculated %, giving the option to retain the current K-Factor or update to the new calculated K-Factor.

# Importing Multiple Energy Tickets

Multiple Energy Tickets may be selected if the billing splits, state and adjustment tax codes, and the Budget Billing status match. If multiple Energy Tickets are imported, the following screen appears.

Process Energy Order

Customer

	<Customer Name>	S-1	S-2	S-3	Bill To
1	▶ James Ade	100.0000			▼

	Cust ID	Customer Name	Tank SN	Tank Description	Order #	Prod ID	Dept ID	<Product>	Amount
1	▶ AdeJa	Ade James	250156	Home Heat	1153	PropHH	Prop00	Propane - Home...	0.00
2	AdeJa	Ade James	250156	Home Heat	1154	PropHH	Prop00	Propane - Home...	0.00

<           >

Apply OK Cancel

Scrolling to the right in the bottom grid allows the *Tank %* and the *Truck Ticket* number to be entered. The *New K-Factor* is visible if the tank is set to have the K-Factor automatically update.