

Posting Equal Bills

Last Modified on 01/23/2024 1:23 pm CST

Posting Equal Bills at *Energy / Equal Bills / Posting* creates a Memo Invoice for each selected customer. Creating a Memo Invoice does not affect the customer's Regular Accounts Receivable account or the General Ledger. It does show on the customer *Payment on Account* screen when the *Budget Billing* Payment Type is selected as well as the Aged Budget Balance report. The General Ledger remains unaffected until a payment is taken against the Memo Invoice.

	Post	Customer	Size	Serial #	Description	Bill Amount
1	<input type="checkbox"/>	Ade James	500	250156	Home Heat	500
2	<input type="checkbox"/>	Daily Tine	700	354161	Home Heat	50
3	<input type="checkbox"/>	Watt Karly	750	691987	Budget Tank	133
4	<input type="checkbox"/>	Anderson Barry	500	1234567	Home Heat	500

Posting Information
Invoice Date: 01/23/2024
Due Date: 01/23/2024
Location: 00MAIN

Filter
Cycle: Monthly
Location: 00MAIN

Create Payment
Date: 01/23/2024
Method: [Dropdown]

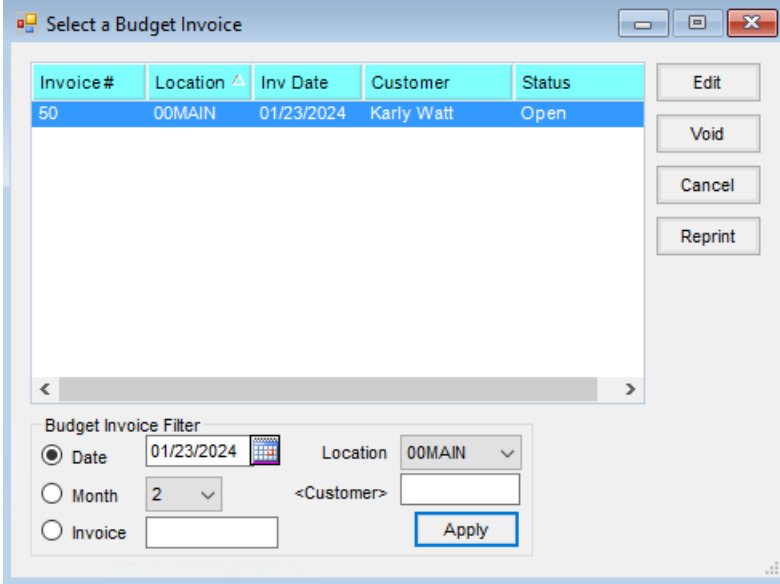
Tag All **Print Invoices**

Print Report **OK** **Cancel**

This process will create one Memo invoice for each tank that has the Post column checked. Each invoice will have one line item with a quantity of one and a rate and extension equal to that customers split percentage of the equal bill amount setup on that tank.

- **Invoice Date** – This the date for the Memo Invoices.
- **Due Date** – This is the due date for the Memo Invoices created.
- **Location** – This is the location for the Invoices created by the posting function.
- **Filter**
 - **Cycle** – This filters for the cycle set at *File / Open / Tank Information* on the *Profile* tab.
 - **Location** – This filters the information in the grid by the location on the tank.
 - **Create Payment** – This option allows the payment to automatically be posted when the bills are created. This is useful in the situation of Budget Billing payments received electronically from customers.
- **Date** – Enter the date for the payment.
- **Method** – Select the payment method to be used on the customer's payment.
- **Tag All** – Select all tanks in the grid for posting.
- **Print Invoices** – Selecting this box prints the Memo Invoices for the selected Equal Billing customers when choosing **OK**.
- **Print Report** – This prints a report of the information shown in the grid.

Once Budget Invoices are posted, this screen at *Energy / Equal Bills / Budget Invoices* gives additional options.



The screenshot shows a window titled "Select a Budget Invoice". It contains a table with the following data:

Invoice#	Location	Inv Date	Customer	Status
50	00MAIN	01/23/2024	Karly Watt	Open

Below the table is a "Budget Invoice Filter" section with the following controls:

- Date: 01/23/2024 (with a calendar icon)
- Month: 2 (with a dropdown arrow)
- Invoice: (empty text box)
- Location: 00MAIN (with a dropdown arrow)
- <Customer>: (empty text box)
- Apply: (button)

On the right side of the window, there are four buttons: Edit, Void, Cancel, and Reprint.

- **Edit** – This option allows the Invoice to be viewed. The Invoice *Due Date* may be edited.
- **Void** – This removes the amount of the Budget Invoice from the *Payment on Account* window and amount due on Budget Billing statements.
- **Reprint** – Select the Invoice to be reprinted. At the top of the screen, a Budget Invoice range may be entered to be reprinted if there are a group of Invoices to print.