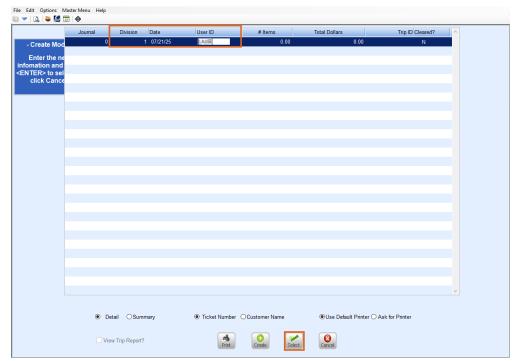
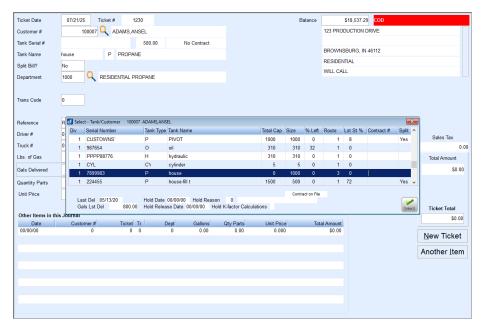
Post a Sale into Energy Force

Last Modified on 07/21/2025 5:33 pm EDT

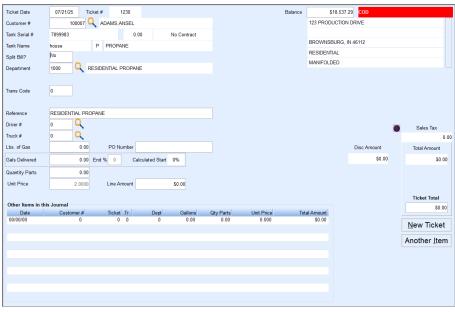
- 1. From the Master Menu, select **Posting Menu**.
- 2. Choose Enter Sales.
- 3. On the Please Select a Sales Journal window, select Create.
- 4. Enter the Division for the Sales Tickets.
- 5. Enter the *Date* of the tickets delivered.
- 6. Enter the User ID.
- 7. Choose Select.



- 8. On the *Sales Journal* window, enter the Ticket or Invoice number in the *Ticket Number* field or press **Tab** and the system will assign a ticket number.
- 9. The date in the *Ticket Date* field will default to the date entered in Step 5 but can be changed if necessary. The system does not allow a date after the system date to be entered or a date before the date in the *Change Posting Date* window.
- 10. Enter the customer number in the *Customer Number* field. Alternatively, press **F5** or select the **Search** icon to choose from a list.
 - **Note:** If a customer is inactive, the number will not appear in the list. Entering an inactive customer number will result in an error message.
- 11. If a customer has more than one tank, select the tank serial number on the Select Tank/Customer window and choose Select.



12. The default department from the Customer *Tank Info* window will display in the *Department Number* field. The department can be changed if necessary. Enter the new department number or press **F5** to select the



- department from the list.
- 13. If the department entered is set to allow discounts, the discount code from *Customer Maintenance* will display in the *Discount Code* field. The discount code can be changed if necessary.
- 14. In the Transaction Code field, the default transaction code from the department set up will display.
- 15. In the *Reference* field, the description for the department number displays. This description prints on statements and displays in the *Customer History Inquiry* window. Enter a corrected description if necessary.
- 16. In the *Driver* # field, enter the number that represents the driver who delivered the gas. By entering the driver code, the system will automatically track sales and gallons for the driver reports.
- 17. Choose *Truck* # that delivered the product. If delivering a non-pumpable product, a truck number will not be required.
- 18. Enter the pounds delivered if applicable to cylinder delivery in the Lbs of Gas field.
- 19. Enter number of gallons the driver delivered in the Gals Delivered field.
- 20. Enter the percentage of the tank after it was filled if desired in the End % field. This information is not required

- for non Keep Full customers.
- 21. The *Calculated Start* will automatically be updated based on *End* %. Enter the percentage of the tank before it was filled if desired. This information is not required for non *Keep Full* customers.
- 22. Enter the quantity in the *Quantity Parts* field if gas was not delivered. This field is used for service work, parts, feet of gas line, etc.
- 23. In the *Unit Price* field, the price from the Price Code on the *Tank Info* window will display. If the Price Code is not correct, enter the correct price with the decimal point.
- 24. In the Line Amount field, the amount will be calculated from the gallons * unit price.
- 25. If the Division is set to allow regulatory fees and gallons have been entered in the *Reg Fee* area, the charge from the regulatory code on the *Tank Info* window will display. If the fee is not correct, enter the correct fee with the decimal point.
- 26. If there is a discount allowed on the sale, the discount amount will display in the *Disc Amount* field. The discount amount is calculated based on the Discount Code and cannot be changed.
- 27. If the discount is taxable, the calculated sales tax amount based on the tax code(s) on the *Tank Info* window will display in the *Disc Tax* field. A breakdown of the tax amount will display above the *Disc Tax* total. To change the sales tax on the discount, select the **Blue Dot** next to the *Disc Tax*, change the tax amount, and select **Exit**.
- 28. In the *Sales Tax Total* field, the calculated sales tax amount based on the tax code(s) on the customer *Tank Info* window displays. A breakdown of the tax code and tax amount will display above the sales tax total.
- 29. In the *Total Amount* field, the amount is automatically calculated by adding the line amount, *Reg Fee*, *Reg Fee*Tax. and *Sales Tax Total*.
- 30. In the Ticket Total field, the accumulated total of the ticket will display.
- 31. To post additional items to the ticket, select Another Item and repeat Steps 11 31.
- 32. If finished with the ticket, select New Ticket and repeat Steps 8 31.
 - Note: A ticket cannot be changed after selecting New Ticket or Another Item. Go to Void Line Item to void the ticket and re-enter the ticket in a new sales journal. To change the ticket before selecting New Ticket or Another Item, press F2 to clear the window and then press ESC start the ticket over.
- 33. To print an invoice for the ticket just entered, after selecting **New Ticket**, choose **Print Inv** and then select **Print** on the *Print* window.
- 34. When done posting tickets, close the Sales Journal window.
- 35. **Print** or **Print Preview** the journal and verify that the *Sales Journal* amount equals the *Department Summary* amount.