Post a Sale into Energy Force

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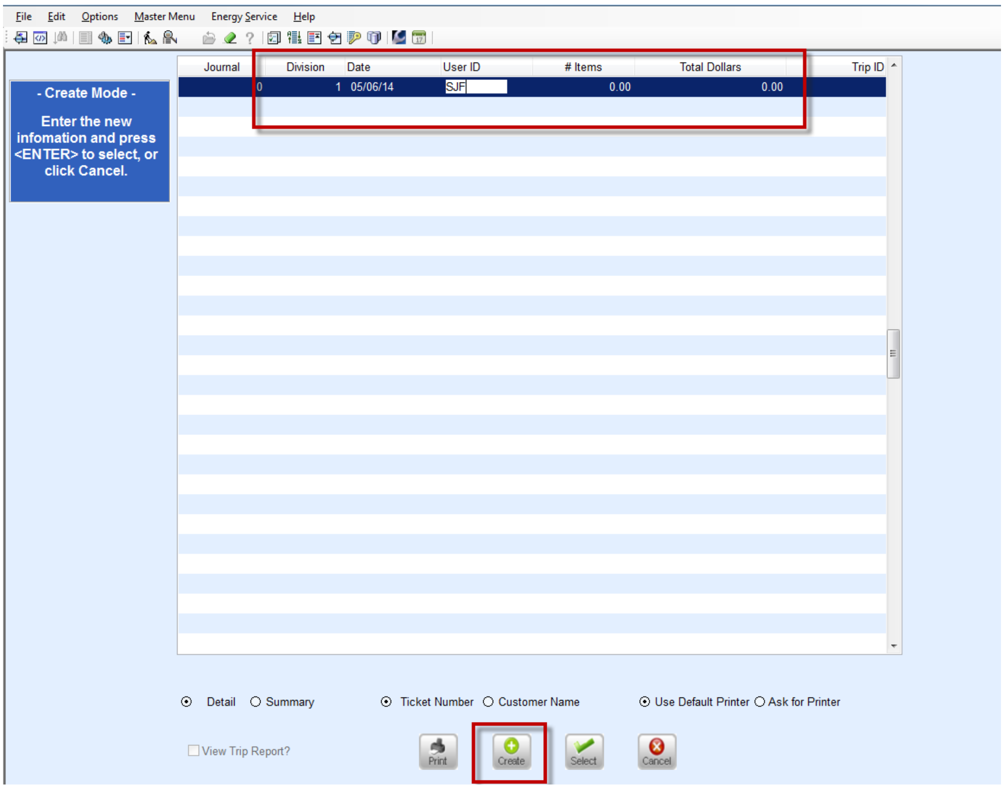
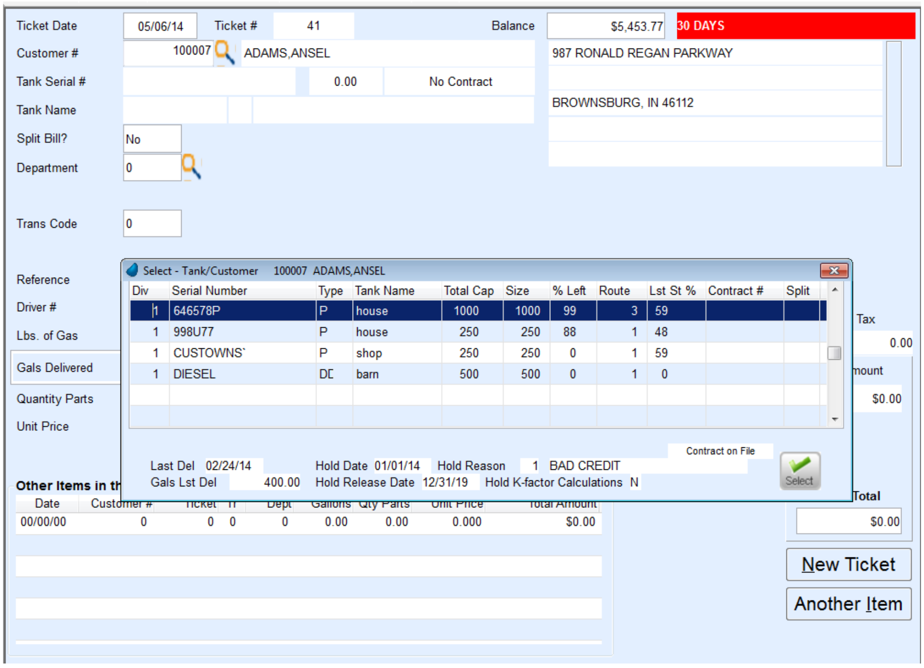
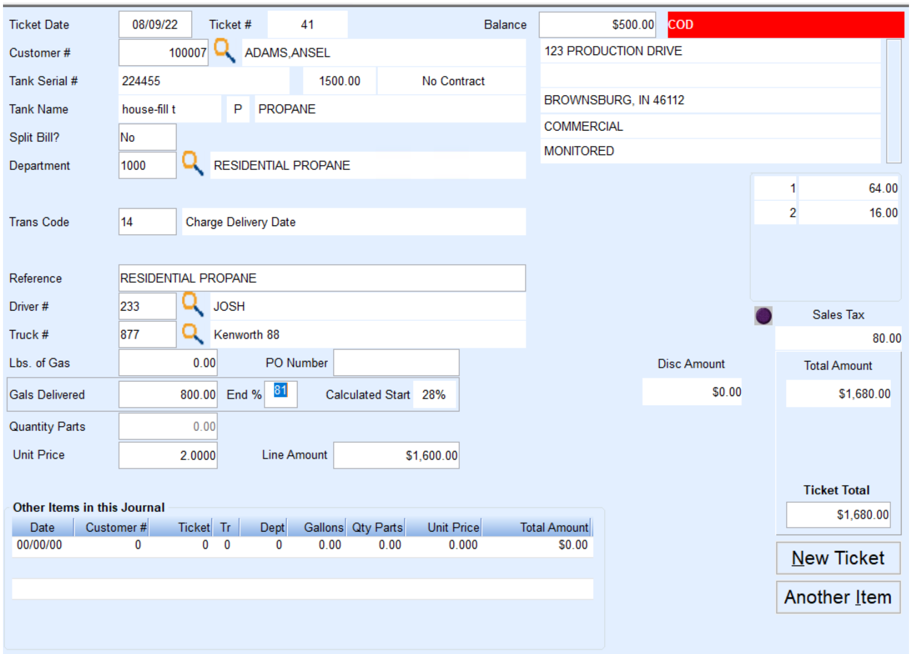
1. From the Master Menu, select **Posting Menu**.
2. Choose **Enter Sales**.
3. On the *Please Select a Sales Journal* window, select **Create**.



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.