

Billing Entry

Last Modified on 01/07/2026 12:10 pm EST

Billing Entry

1. Go to Main Menu / Posting Menu / Recurring Billing Menu / Billing Entry.
2. Select **Create** or **Ctrl+C** on the keyboard.
3. Select the **Search** icon or press **F5** to select the *Division, Customer #/Name, and Cycle Code*.

The screenshot shows the Billing Entry software interface. On the left, a search results grid displays customer information: Division (1), Customer # (100007), Name (ADAMS ANSEL), and Cycle Cd (1). To the right of the grid is a detailed view of the customer record, showing the address (345 PRODUCTION DRIVE, BROWNSBURG, IN 46112) and a Customer Total section with Billing (\$2.00), Tax (\$0.10), and Total (\$2.10). Below the grid is a table for tank entries. The table has columns for Tank Serial # (7899983), Tank Type (P), Department (1000), Description (RESIDENTIAL PROPANE), Quantity (1.00), Price Code (2), Tier Code (A), Price (\$2.00), and Loc (2). To the right of the table is a 'View Taxes' button and an Item Total section showing Billing (\$2.00), Tax (\$0.10), and Total (\$2.10). At the bottom right are buttons for Modify, Create, Save, and Cancel.

4. The *Tank Serial #* will default if the customer only has one tank. If the customer has multiple tanks, select the appropriate tank from the list that displays.
5. Choose the **Search** icon or press **F5** to select the *Department*. Enter the *Quantity* and choose on the **Search** icon to select the *Price Code* and *Tier Code*.
6. Review the *Billing* and *Tax* information to verify the information is correct.
7. Select **Save**.
8. Choose **Create** to add each customer that will be assessed a Recurring Billing Fee.
9. Once saved, a list of customers entered will display. If a customer was set up in error, highlight the customer and press the **Delete** button or **F3** on the keyboard.

Billing Customer List

It is best practice to print the Billing Customer List before processing recurring billing files. This gives the ability to review the customers per Division and Cycle Codes to ensure the Billing Entry file is accurate.

1. Go to Main Menu / Posting Menu / Recurring Billing Menu / Billing Customer List.

2. Enter the Division and Cycle Code and then select **Process**.
3. Select the **Printer** to print.
4. Review for accuracy. If changes need to be made, return to the *Billing Entry* screen and edit as necessary.

Process Recurring Billing

1. Navigate to *Main Menu / Posting Menu / Recurring Billing Menu / Process Recurring Billing*.
2. Select **Create** or press **Ctrl+C** on the keyboard.
3. Enter a *Description* for what will be processed.

Complete form and Change to Query Mode to Process

Create Date	Create Time	Created By	Description	File Name	Process As Of Date
12/05/16	15:54:38	sreasons	sdifaslkjdfkl	DKGFK	12/05/16
12/05/16	15:55:29	sreasons	sdkfskff	ALDF	12/05/16
12/05/16	15:56:47	sreasons	adfasfd	DD	12/05/16
05/08/14	14:03:12	SHANNON	APRIL READING FEE	APR14	04/30/14

Division Cycle Code Location Code

Populate Recurring Billing **Post Recurring Billing**
Print Billing Report **Delete Recurring File**
View/Edit Billing File



4. Enter a unique *File Name*.
5. In the *Process as of Date* field, enter the date on which the recurring charges should be applied.
6. Enter the *Division* to process. Enter *0* to process all *Divisions*.
7. In the *Cycle Code* area, enter the *Cycle Code* to process. Enter *0* to process all *Cycle Codes*.
8. Press **Ctrl+Q** to save the setup. Once saved, **Populate Recurring Billing** will highlight. **Delete Recurring File** will be highlighted as well. (If the wrong parameters were entered in the file setup, highlight the file name and select **Delete Recurring File**.)
9. Choose **Populate Recurring Billing**. This will populate the Billing File with all customers that were entered into the Billing Entry program with the same Cycle Code and Division. The **View/Edit** and **Print Recurring Billing** buttons will highlight when the program is finished running.
10. Select **View/Edit Billing File** to review billing information or to print the billing report for review. (It is not required to print the report but may be beneficial to keep for with records.) Delete customers from the View/Edit billing file by pressing **Ctrl+M** on the keyboard and then pressing **F3**. The amount of the billing cannot be edited. Press **ESC** on the keyboard when finished editing.
11. Once editing is completed, select **Post Recurring Billing**. Enter the Division to post to and select **Process**. This will update the customer account file, sales history, and create a posting journal in the *Sales Entry* menu.