

Create an Invoice

Last Modified on 02/04/2026 4:43 pm EST

Invoices are created in EnergyService by selecting **Invoices**.

1. Select **Invoices**.
2. Highlight the customer and choose the *Invoices* tab.

Div	Customer Number	Name	Address	Phone
1	100005	BROCK, MICHAEL	123 ANYWHERE ST	(317) 555-1212
2	444	DO SHANNON	88 FREEWAY LANE	(317) 555-1212
1	10089	DOE, JANE	123 MAIN STREET	(231) 723-5555
1	100000	DOE, JOHN	111 PRODUCTION DRIVE	(317) 999-9999
1	10094	DOE, JOHN	1234 ANYWHERE ST	(555) 555-1212
1	199999	DUBE, DEBBIE	30303 WEST FIR STREET	(319) 444-4444

Include Inactive Customers

Accounts Receivable **Address & Information** Budget Information Landlord Tank Rent

Credit Limit	\$0.00	Status	Active	Date	00/00/00
Current Balance	(2,436.85)	Inactive Reason Code	0		
30 Day Balance	\$0.00	Turned Over To Collection	No		
60 Day Balance	\$0.00	Number Of Tanks	4		
90 Day Balance	\$1,156.75	Total Balance all Accts	(1,280.10)		
Total Balance	(1,280.10)	Sales YTD All Tanks	\$1,350.73		
Call In History		Alt Cust Credits			
Last Payment Date	06/20/18	Pay	Gallons Used YTD All Tanks	2,686.00	
Last Payment Amount	\$20.00		Safety Info Received Date	06/23/19	
Last Statement Balance	\$1,156.75				
Last Statement Date	03/31/21				
Bill To	100005				
30 DAYS					
Automatic Payment Type	Tax Exemptions	User Defined	Tank Address	Tank Prices	
Service Orders	Proposals	Invoices	Service Locations		

Tank Info
Safety Form
Appliances
Contract Gas
History Inquiry
Purged Inquiry
Tank Readings
Efficiency
Payment Arrangement
Tickler Information
Meter/RTM Information
Payment Methods
Print Label
Work Orders
Energy-Image

3. Press **Ctrl+C** or choose **Create**. The Invoice will automatically default to the customer highlighted.
4. Enter the *Service Location*, *Service Order Type*, and *Sales Rep* (optional) by selecting the **Search** icon or pressing **F5**.

5. Enter *Comments* if desired. (This message will print on the customer Invoice)
6. Go to the *Inventory Item* and press **F5** to display inventory items. Search by Division, Warehouse, Storage Description, Item, Descriptions, Category, etc.

7. Check the items to be billed and select **Save Selections**. This will return to the *Invoice* screen.
8. Enter the Qty for each line item. The total amount column will automatically calculate as will any applicable taxes.
9. If ready to complete the invoice and post to the customer account, select **Post**. Select the number of invoices

to print.

10. If not ready to post, choose **Save and Close**. Return to the invoice at any time to modify as necessary and select **Post**.
11. Select the number of invoices to print.
12. A sales journal will automatically generate. A Service Journal will be indicated by prepending an S in the *User ID* column.

Journal	Division	Date	User ID	# Items	Total Dollars	Trip ID	Cleared?
1217	1	02/04/26	S-[REDACTED]	2.00	2,477.94	N	
1216	1	02/02/26	S-[REDACTED]	3.00	2,982.70	N	
1213	1	01/27/26	S-[REDACTED]	1.00	5,122.44	Y	
1211	1	12/10/25	I-[REDACTED]	0.00	0.00	Y	

13. The journal will reflect the items purchased by customer and will update the customer history information.

02/04/26	15:40	Sales Posting Journal						Page	1					
UserID						Posting Date 02/04/26								
						Journal # 1217								
Journal Detail														
Ticket	Div	Customer#	Name	Trans	Driver	Date	Dept.	Reference	Parts	Gallons	Line Amount	Sales Tax	Total Amt	
538	1	100005	BROCK,MICHAEL	13	0	02/04/26	999	PROPANE PARTS						
538	1	100005	BROCK,MICHAEL	13	0	02/04/26	999	PROPANE PARTS						
Totals:										2.00	0.00	\$2,477.94	\$0.00	\$2,477.94