

# 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.

The screenshot displays the EnergyService software interface. At the top, a table lists customers with columns for Div, Customer Number, Name, Address, and Phone. Customer 1, Brock, Michael, is highlighted. Below the table, the 'Invoices' tab is selected, showing various financial and operational details for the selected customer. The interface includes sections for Accounts Receivable, Address & Information, Budget Information, and Landlord Tank Rent. Key financial data includes Current Balance, 30 Day Balance, 60 Day Balance, 90 Day Balance, and Total Balance. Operational data includes Status, Inactive Reason Code, Turned Over To Collection, Number Of Tanks, Total Balance all Accts, Sales YTD All Tanks, Gallons Used YTD All Tanks, and Safety Info Received Date. A sidebar on the right contains links to 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, and Energy-Image. At the bottom, a row of tabs includes Service Orders, Proposals, Invoices (highlighted), and Service Locations.

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 | Turned Over To Collection: No

30 Day Balance: \$0.00 | Number Of Tanks: 4

60 Day Balance: \$0.00 | Total Balance all Accts: (1,280.10)

90 Day Balance: \$1,156.75 | Sales YTD All Tanks: \$1,350.73

Total Balance: (1,280.10) | Gallons Used YTD All Tanks: 2,686.00

Call In History | Alt Cust Credits

Last Payment Date: 06/20/18 | Last Payment Amount: \$20.00 | 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**.



to print.

Previous Next Save Print Preview E-mail Find

☐ Finalized?

### Invoice

Bill To Name / Address

Customer# 100005

MICHAEL BROCK

123 ANYWHERE ST

PENSACOLA, FL 32501

Service Name / Address

Service Location# 2

MICHAEL BROCK

123 ANYWHERE ST

ANYWHERE, IN 46123

Comments

Date 02/04/2026

Invoice# 538

Service Order Type 2 TANK SET

Sales Rep 2 JOHN SMITH

Customer Message

Div	Warehs. Name	Storage Desc.	Item	Description	Quantity	Amount	Total Amount
			00-5406	1000 GAL SKID TANK SINGLE WALL	1.00	\$2,327.94	\$2,327.94
			LABOR	LABOR	1.00	\$150.00	\$150.00

Add Line Remove Line

Sign

Inactivated by: Inactivated Date/Time: 00/00/0000 00:00:00

Sub Total \$2,477.94  
Tax \$0.00  
Total \$2,477.94

Undo Clear Search Create Modify Save & Close Post

- If not ready to post, choose **Save and Close**. Return to the invoice at any time to modify as necessary and select **Post**.
- Select the number of invoices to print.
- 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	2.00	2,477.94	N
1216	1	02/02/26	S	3.00	2,982.70	N
1213	1	01/27/26	S	1.00	5,122.44	Y
1211	1	12/10/25	L	0.00	0.00	Y

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

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Sales Posting Journal

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User ID

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	
				Tank	Serial #		Tax	St %	End %	Mtr Read	Unit Price			
538	1	100005	BROCK,MICHAEL											
	13	0	02/04/26			999	PROPANE PARTS							
						N			0	150.0000				
									1.00	0.00	\$150.00	\$0.00	\$150.00	
538	1	100005	BROCK,MICHAEL											
	13	0	02/04/26			999	PROPANE PARTS							
						N			0	2,327.9400				
									1.00	0.00	\$2,327.94	\$0.00	\$2,327.94	
Totals:										2.00	0.00	\$2,477.94	\$0.00	\$2,477.94