

Split Bills - Refined Fuels

Last Modified on 05/14/2024 9:30 am EDT

If a tank has been set up for Split Bills in Energy Force, EnergyTrack will automatically invoice the associated customer accounts for their portion of the billing.

If a tank has a split associated, the split percentage will display in the lower portion of the *Tank* screen on the *Route* tab. This percentage cannot be modified here but can be modified at the time of delivery.

DOE,JOHN		Bus Owns	Y	Add Comment	Deliver	Back
Route Contracts Directions Call In / Hold Update %						
Last Delv:	250.00	% Left:	0	Product:	1001	COMMERCIAL PROP
K-Factor:	0.81	DailyUse:	0.00	Price:	2.0000	View History
Next Julian:	00/00/00	% Upd:	06/24/16	Route:	1	ROB
Cust:	RESIDENTIAL					
Delv:	KEEP FULL					
DD Last Delv:	20	DD Next Delv:	340	Reg Cd:		
Calc. Dollars	Prod. Deliv.	Meters	Navigate	Splits	50.00%	Tank Leak Test: 00/00/00
						Gas Check Date: 02/01/14

Split Billing Rules

- When billing splits, the percentage of each member can be modified. All percentages must add up to 100%.
- A member can be modified to 0%. However, new members must be added from the back office.
- Prices can be modified for the split bill members with the exception of contract deliveries. Contract pricing cannot be modified.
- If the tank holder has a contract on file, the contract will automatically apply to the delivery.
- If members of the split have a contract on file that is associated with the same tank type as the delivery, their contract will automatically apply to their portion of the delivery.
- Only one pumpable item can be billed on a split ticket.
- If the tank holder has an applicable discount, all members will receive a discount for their delivery.
- Selecting **Add Items** will have items split among each member based on the split percentage.

Split Billing Delivery

1. Select the customer account belonging to the tank holder and select **Tanks**.
2. Choose **Deliver** to make the delivery.
3. Pump gallons as usual and proceed to the *Invoice* screen.
4. The *Invoice* screen will display a checkmark next to the *Split Bill?* field. If the delivery should not apply to the split, uncheck this field. One hundred percent of the gallons will be billed to the tank holder.
5. If pricing or percentages need to be modified for the split members, select **Splits**.

Customer	BROCK,MICHAEL			Total Capacity	500.00
Contract#	Contract: 529			Split Bill?	<input checked="" type="checkbox"/> Splits
Tank Serial #	DYEDDSL				
Tank Name	FIELD				
Department	3000	Choose	DYED DIESEL FUEL		
Gals / Qty	400.00		PO#		
Preview Price	Line Amount	All Taxes	Total Amount	Start %	19
1.7500	700.0000	0.00	700.0000	End %	99
400.00	1.7500	DYED DIESEL FUE			
			Remove	Out of Gas	
			Discount	Payment	
				Add Item	
			\$700.00	Continue	

Customer #	Name	Contract #	%	Price
100005	BROCK,MICHAEL	529	50.00	1.7500
100007	ADAMS,ANSEL		50.00	1.9900

- a. Update as necessary. Select **Save & Close** when finished.
 - b. Price changes must be made on the *Splits* screen in order to take effect. Price changes on the *Invoice* screen will not flow through to the Invoices.
 - c. Contract prices cannot be modified and will not flow through to the Invoices.
6. Choose **Continue** to finalize and print the Invoice. An Invoice for each member will print indicating the applicable percentage of gallons for each Invoice.