

Invoicing Split Bill Tanks - Energy Force Manual Sales Entry

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Billing a Split Tank is similar to a standard delivery with the exception of a *Split Preview* screen within the *Posting* screen. When pricing or percentages need to be modified, it must be done on the *Split Preview* screen for the changes to take effect for the current sales entry.

The screenshot displays the Energy Force Sales Entry interface. Key elements include:

- Header Information:** Ticket Date (09/05/19), Ticket # (1155), Balance (\$15,627.50), and Customer # (100007 ADAMS, ANSEL).
- Customer Details:** 987 RONALD REGAN PARKWAY, BROWNSBURG, IN 46112, AGRICULTURAL, WILL CALL.
- Split Bill Configuration:** The "Split Bill?" field is set to "Yes" and "Splits" is selected. A table below shows the split configuration for two customers:

Customer #	Name	Contract #	Split %	Price
100006	ALLISON, JENNY		50.00	2.1200
100007	ADAMS, ANSEL		50.00	2.1200

Additional fields include Tank Serial # (CUSTOWNS', 1000.00), Tank Name (COMMERCIAL PROPANE), Trans Code (0), Reference (COMMERCIAL PROPANE), Driver # (0), Lbs. of Gas (0.00), PO Number, Gals. Delivered (0.00), End % (0), Calculated Start (0%), Quantity Parts (0.00), Unit Price (2.1200), and Line Amount (\$0.00). A table at the bottom shows "Other Items in this Journal" with columns for Date, Customer #, Ticket, Tr, Dept, Gallons, Qty Parts, Unit Price, and Total Amount.

1. Create the Sales Journal as usual and advance to the *Sales Entry* screen.
2. Select the primary tank holder *Customer #*.
3. Choose the Split tank.
4. After the tank is selected, the *Split Bill?* field will have *Yes* populated.
 - If the split is to apply to the tank, leave as *Yes*.
 - If the split does not apply to the sale being entered, change to *No*.
5. Review the *Split Preview* screen for accuracy. If any items need modified such as percentages or pricing, select **Splits**.
 - If the *Split %* or pricing is modified at the time of the sales entry, it will not permanently save to the Split Bill program located on the Tank Info screen. A modification will need to be made at the tank level if the tank needs to be permanently modified.
 - If a contract applies to any split bill member, price changes will not fully process. The contract price will override modified prices.
6. If **Splits** is selected, modify the *Split %* or *Price* field on the *Preview* screen as needed.
 - Example: The split percentages have been modified from 50% on each member to 60% for the secondary member and 40% for the primary tank holder. The pricing has also been modified so the non-tank holder will be billed at a rate of \$3 per gallon. The price listed in the *Unit Price* field is not used when billing splits in Energy Force. Only the Split Preview prices are used.

Ticket Date	09/05/19	Ticket #	1165	Balance	\$15,627.50	COO
Customer #	100007	ADAMS, ANSEL	987 RONALD REGAN PARKWAY			
Tank Serial #	CUSTOWNS	1000.00	No Contract			
Tank Name	PIVOT	P	PROPANE	BROWNSBURG, IN 46112		
Split Bill?	Yes	Splits		AGRICULTURAL		
Department	1001	COMMERCIAL PROPANE		WILL CALL		
Trans Code	14	Charge Delivery Date				
Reference	COMMERCIAL PROPANE					
Driver #	4	CURT				
Lbs. of Gas	0.00	PO Number				
Gals Delivered	800.00	End %	88	Calculated Start	8%	
Quantity Parts	0.00					
Unit Price	2.1200	Line Amount	\$1,696.00			

Other Items in this Journal							
Date	Customer #	Ticket	Tr	Dept	Gallons	Qty Parts	Total Amount
00/00/00	0	0	0	0	0.00	0.00	\$0.00

New Ticket

7. Select in the *Split Bill?* field when finished and press Tab to navigate to the corresponding fields to enter the *Driver #, Gals Delivered,* and *End %.*
8. If there are other items to invoice, select **Another Item** and repeat the steps outlines for sales posting.
9. Select **New Ticket** when the sales entry is complete.
10. Press **ESC** on the keyboard to return to the Sales Journal listings.
11. Review the sales journal for accuracy.