

Installment Bills Overview

Installment billing is used to invoice customers in segments, with the total amount due divided equally, by percentage, or according to the configured definition. Each installment bill includes the installment number, the number of installments, the installment amount due, and the total invoice amount. Detailed installment billing information is entered manually on the **Installment Bill Terms** tab on the **Installment Bill Schedules** page.

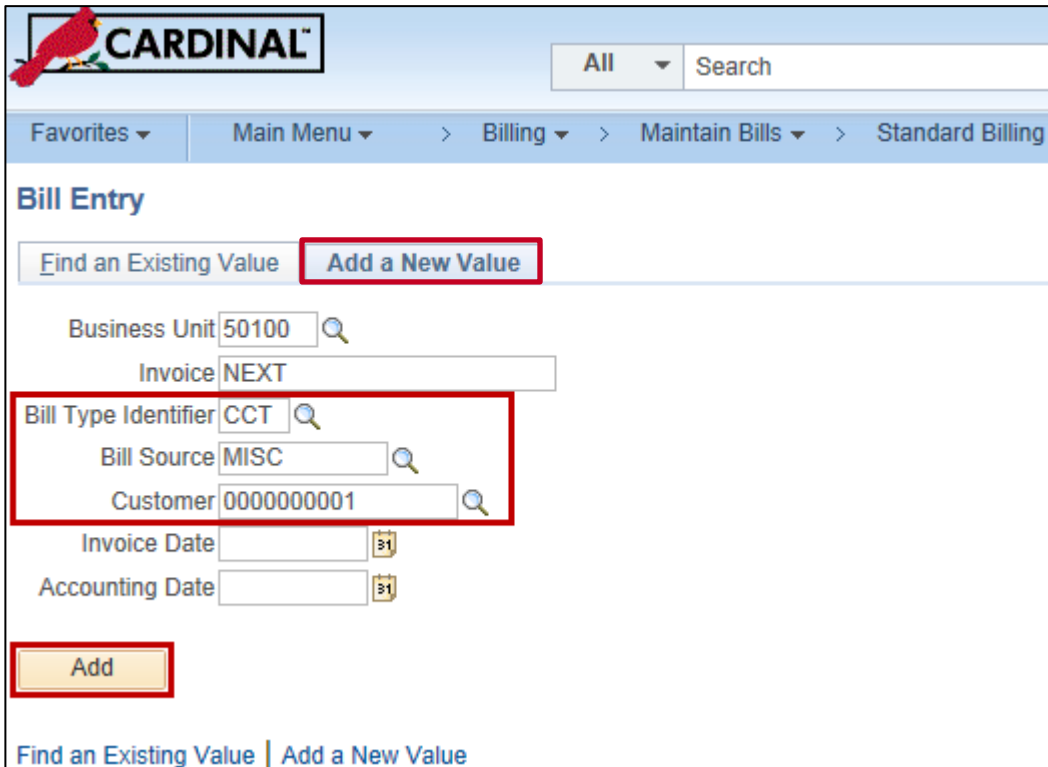
Table of Contents

Create an Installment Bill 2

Create an Installment Bill

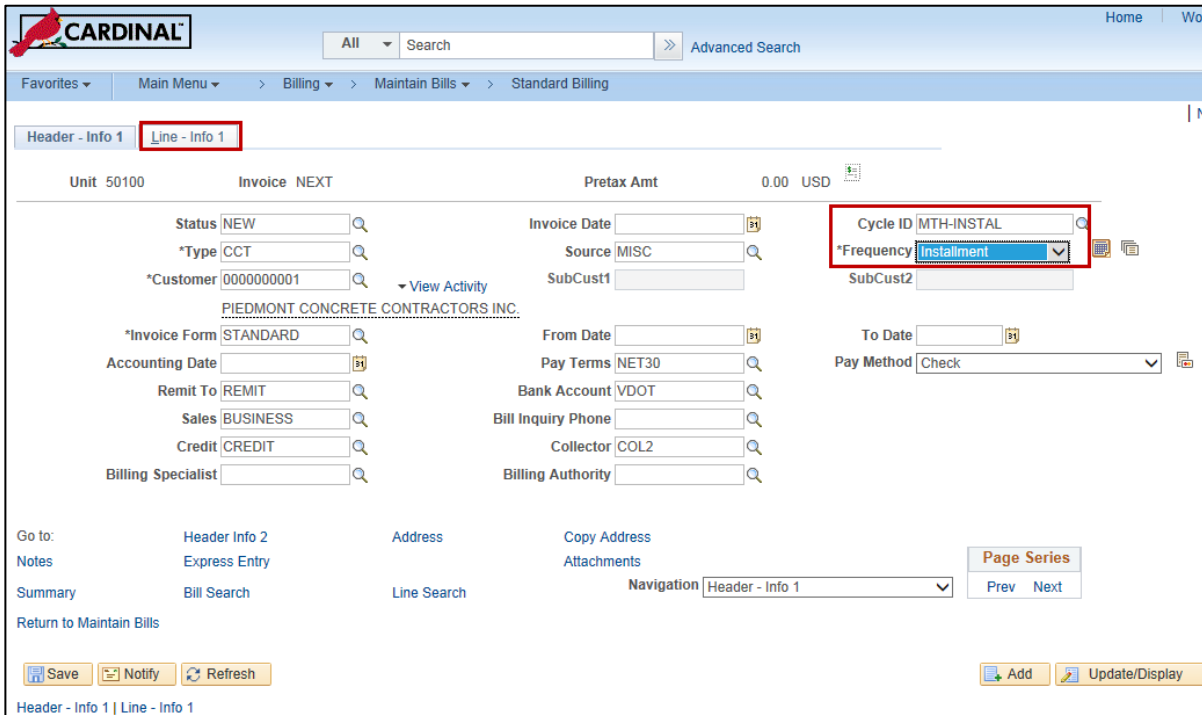
1. Navigate to the **Bill Entry** page using the following path:

Main Menu > Billing > Maintain Bills > Standard Billing



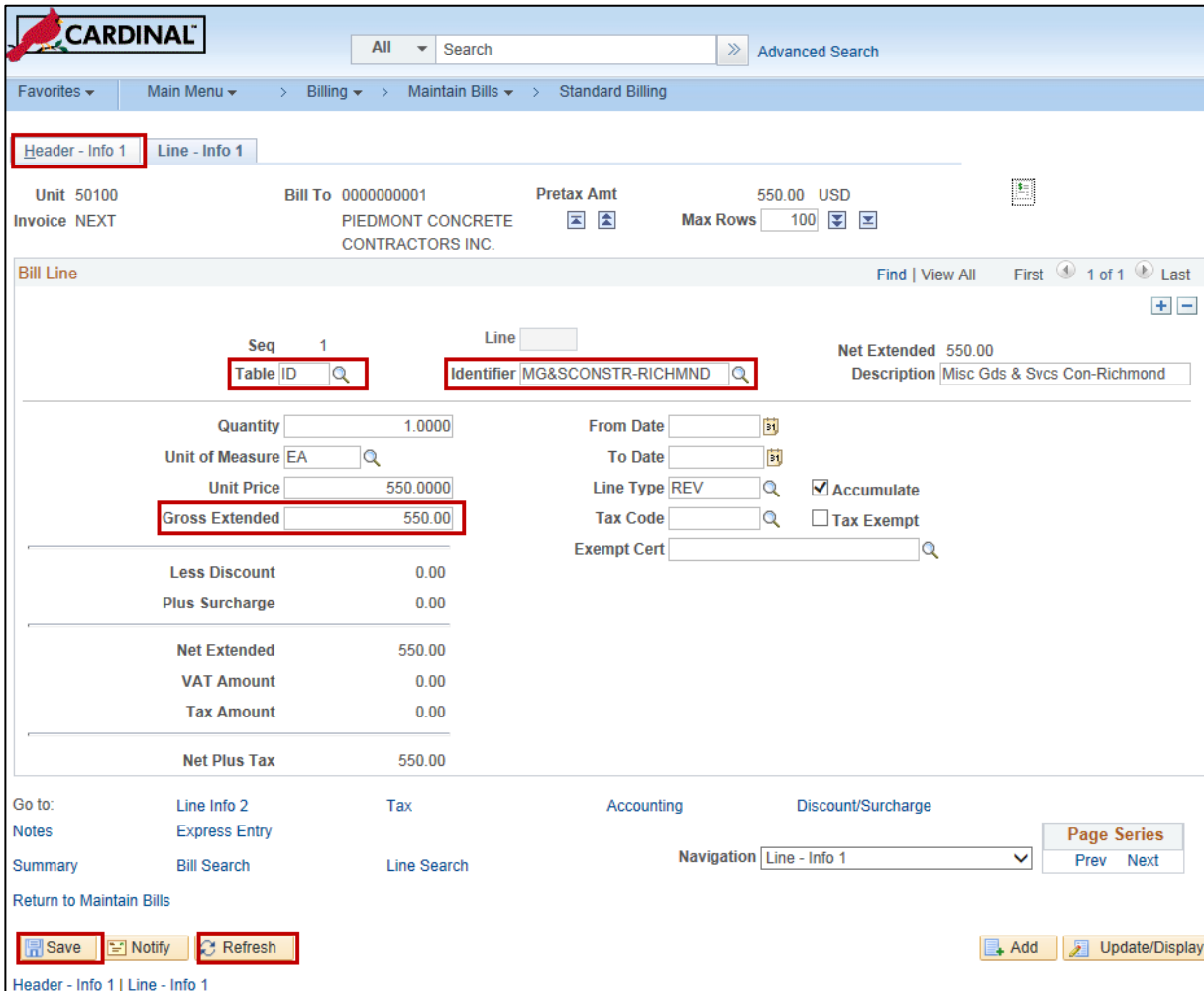
The screenshot shows the 'Bill Entry' page in the Cardinal software. The breadcrumb navigation is 'Main Menu > Billing > Maintain Bills > Standard Billing'. The 'Add a New Value' tab is selected. The form contains the following fields: Business Unit (50100), Invoice (NEXT), Bill Type Identifier (CCT), Bill Source (MISC), and Customer (0000000001). The 'Add' button is highlighted with a red box. The 'Find an Existing Value' and 'Add a New Value' tabs are also visible at the top and bottom of the form area.

2. The **Bill Entry** page displays.
3. Enter a new bill by selecting the **Add a New Value** tab.
4. Complete the required standard billing fields according to your agency's policy. Enter the following fields at a minimum:
 - a. **Bill Type Identifier**
 - b. **Bill Source**
 - c. **Customer**
5. Click the **Add** button.



The screenshot shows the 'Header - Info 1' tab in the Cardinal Accounts Receivable system. The interface includes a search bar at the top, a navigation menu, and a form for entering bill information. The 'Cycle ID' is set to 'MTH-INSTAL' and the 'Frequency' is set to 'Installment'. The customer is 'PIEDMONT CONCRETE CONTRACTORS INC.' and the invoice type is 'CCT'. The unit is '50100' and the invoice is 'NEXT'. The pretax amount is '0.00 USD'. The form also includes fields for 'Status', 'Invoice Date', 'Source', 'SubCust1', 'SubCust2', 'Invoice Form', 'From Date', 'To Date', 'Accounting Date', 'Pay Terms', 'Pay Method', 'Remit To', 'Bank Account', 'Sales', 'Bill Inquiry Phone', 'Credit', 'Collector', and 'Billing Authority'. There are also buttons for 'Save', 'Notify', 'Refresh', 'Add', and 'Update/Display'.

6. The **Header - Info 1** tab displays. Select the following values:
 - a. **Cycle ID: MTH-INSTAL**
 - b. **Frequency: Installment**
7. Click on the **Line - Info 1** tab.



CARDINAL All Search >> Advanced Search

Favorites > Main Menu > Billing > Maintain Bills > Standard Billing

Header - Info 1 | Line - Info 1

Unit 50100 Bill To 000000001 Pretax Amt 550.00 USD
 Invoice NEXT PIEDMONT CONCRETE CONTRACTORS INC. Max Rows 100

Bill Line Find | View All First 1 of 1 Last

Seq 1 Line Net Extended 550.00
 Table ID Identifier MG&SCONSTR-RICHMND Description Misc Gds & Svcs Con-Richmond

Quantity 1.0000 From Date
 Unit of Measure EA To Date
 Unit Price 550.0000 Line Type REV Accumulate
 Gross Extended 550.00 Tax Code Tax Exempt
 Exempt Cert

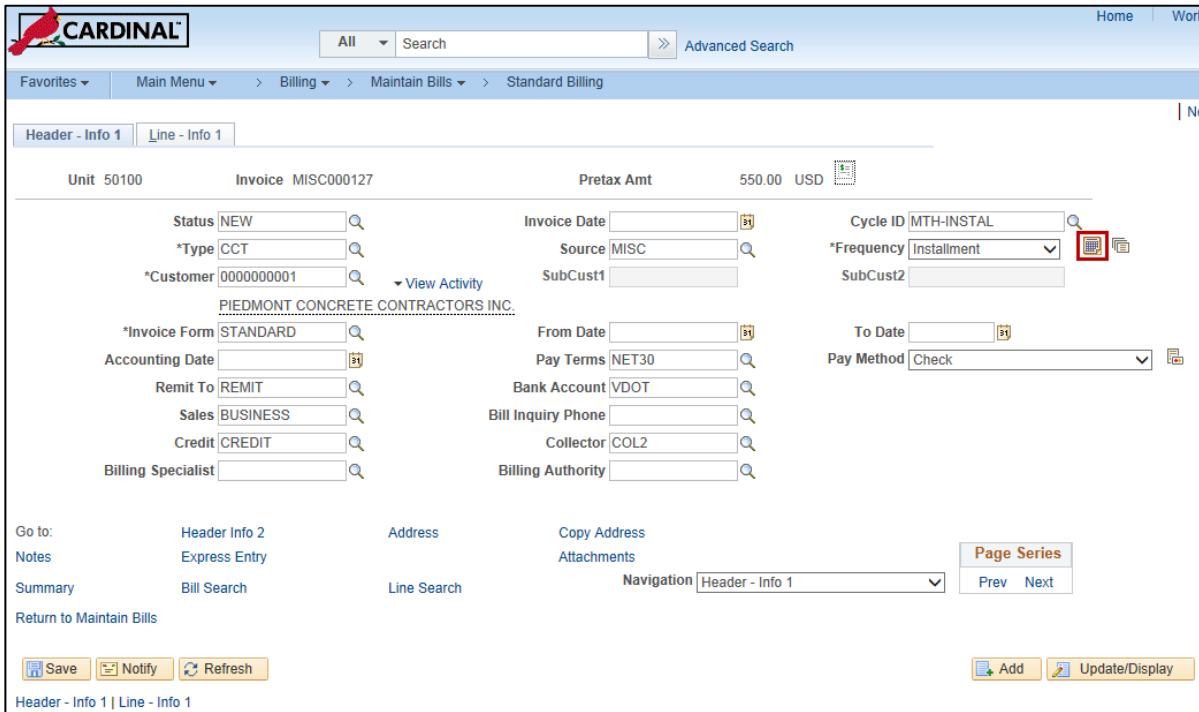
Less Discount	0.00
Plus Surcharge	0.00
Net Extended	550.00
VAT Amount	0.00
Tax Amount	0.00
Net Plus Tax	550.00

Go to: Line Info 2 Tax Accounting Discount/Surcharge
 Notes Express Entry
 Summary Bill Search Line Search Navigation Line - Info 1 Page Series
 Return to Maintain Bills

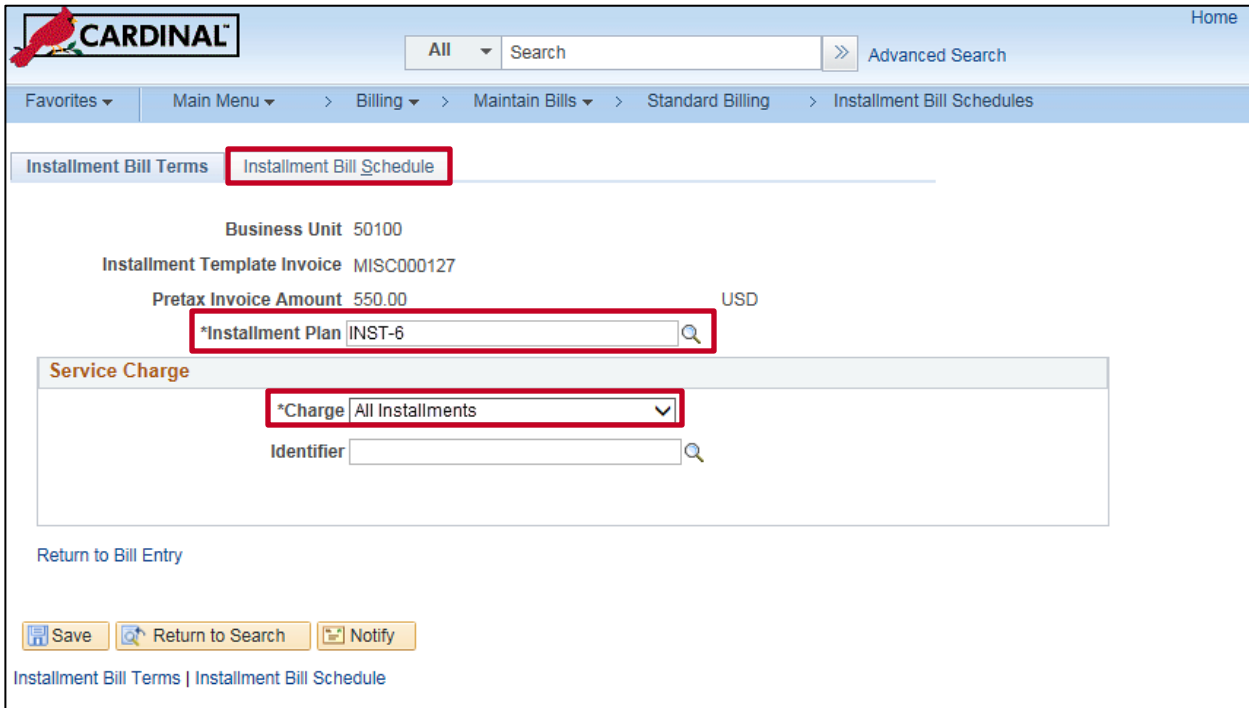
Save Notify Refresh Add Update/Display

Header - Info 1 | Line - Info 1

8. Enter the desired billing information. At a minimum, enter the following values:
 - a. **Table**: determines the type of options available in the identifier field
 - b. **Identifier**: used to select the item that is billing billed and the associated charge distribution
 - c. **Gross Extended**: total amount of the individual installment bills
9. Once you have entered all the fields, click the **Refresh** button. Other values display based on your entries.
10. Click the **Save** button. Upon save, Cardinal updates the **Invoice ID** with the next sequential number available.
11. Click the **Header - Info 1** tab.



12. On the **Header - Info** tab, click the **Go To Installment Bill Schedule** icon  .



CARDINAL Home

All Search >> Advanced Search

Favorites Main Menu > Billing > Maintain Bills > Standard Billing > Installation Bill Schedules

Installation Bill Terms **Installation Bill Schedule**

Business Unit 50100

Installation Template Invoice MISC000127

Pretax Invoice Amount 550.00 USD

*Installation Plan INST-6

Service Charge

*Charge All Installments

Identifier

[Return to Bill Entry](#)

[Save](#) [Return to Search](#) [Notify](#)

[Installation Bill Terms](#) | [Installation Bill Schedule](#)

13. The **Installation Bill Terms** tab displays. At a minimum, enter values for the following fields:
 - a. **Installation Plan**
 - b. **Charge**
14. Click the **Installation Bill Schedule** tab.

Business Unit 50100
 Installment Template Invoice MISC000127
 Pretax Invoice Amount 550.00 USD
 Installment Plan INST-6 Equal Installment Plan-6 mth
 Start Date 12/01/2016
 Pre-Assign Invoice Numbers

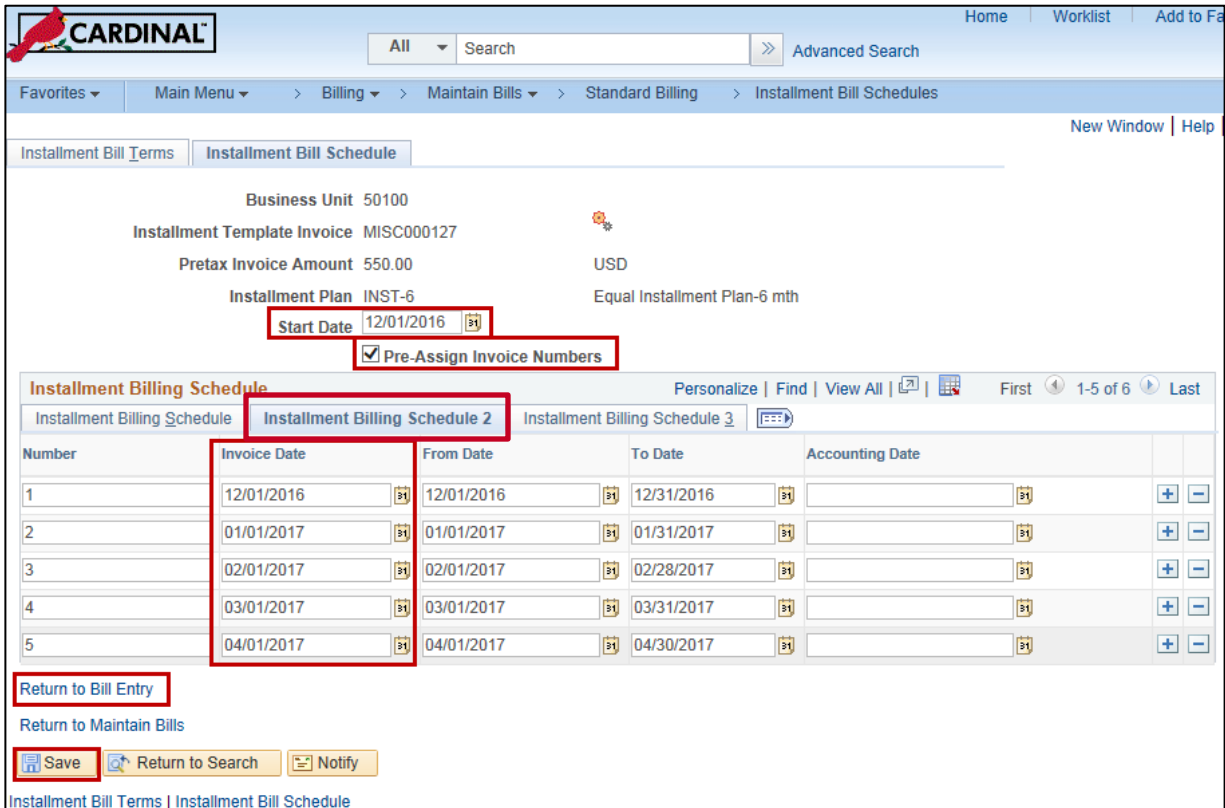
Number	Generate Date	Invoice	Installment Amount	Service Charge Amount
1	11/26/2016	NEXT	91.67	
2	12/27/2016	NEXT	91.67	
3	01/27/2017	NEXT	91.67	
4	02/24/2017	NEXT	91.67	
5	03/27/2017	NEXT	91.67	

15. Enter billing schedule information in the **Installment Bill Schedule** tab. At a minimum, enter the following values:

- Start Date**
- Generate Date(s)**
- Installment Amount(s)**

Note: The installment amounts must equal the line amount you entered in the **Gross Extended** field in [Step 8](#).

- Select the **Pre-Assign Invoice Numbers** checkbox.
- Click on the **Generate Install Bill Schedule** icon. (Click **OK** if a warning message displays.) **Installment Billing Schedule** lines are created with the **Generate Date** and **Installment Amount** fields generated.
- Click the **Installment Billing Schedule 2** tab.



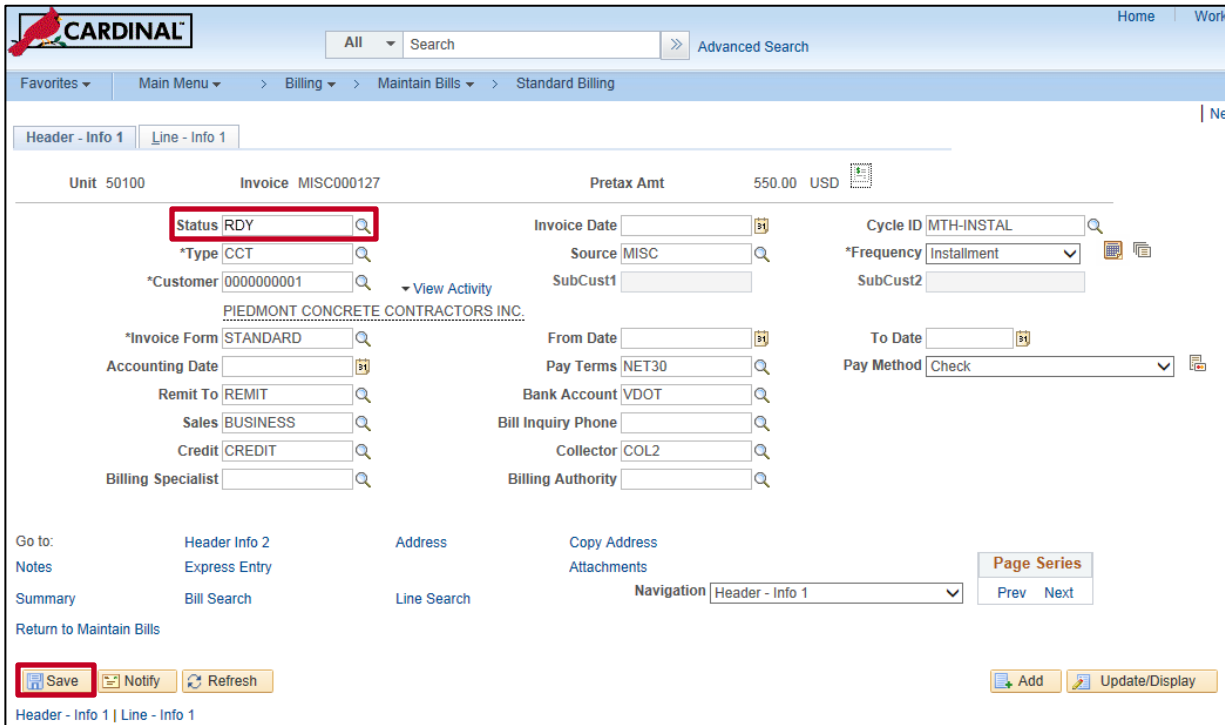
Business Unit 50100
 Installment Template Invoice MISC000127
 Pretax Invoice Amount 550.00 USD
 Installment Plan INST-6 Equal Installment Plan-6 mth
 Start Date 12/01/2016
 Pre-Assign Invoice Numbers

Installment Billing Schedule

Number	Invoice Date	From Date	To Date	Accounting Date
1	12/01/2016	12/01/2016	12/31/2016	
2	01/01/2017	01/01/2017	01/31/2017	
3	02/01/2017	02/01/2017	02/28/2017	
4	03/01/2017	03/01/2017	03/31/2017	
5	04/01/2017	04/01/2017	04/30/2017	

[Return to Bill Entry](#)
[Return to Maintain Bills](#)

19. On the **Installment Billing Schedule 2** tab, the **Invoice Date** field displays for each installment.
20. Click the **Save** button.
21. Click the **Return to Bill Entry** link located at the bottom of the page.



Unit 50100 Invoice MISC000127 Pretax Amt 550.00 USD

Status RDY

Invoice Date [] Cycle ID MTH-INSTAL

*Type CCT Source MISC *Frequency Installation

*Customer 0000000001 SubCust1 SubCust2

PIEDMONT CONCRETE CONTRACTORS INC.

*Invoice Form STANDARD From Date [] To Date []

Accounting Date [] Pay Terms NET30 Pay Method Check

Remit To REMIT Bank Account VDOT

Sales BUSINESS Bill Inquiry Phone []

Credit CREDIT Collector COL2

Billing Specialist [] Billing Authority []

Go to: Header Info 2 Address Copy Address

Notes Express Entry Attachments Page Series

Summary Bill Search Line Search Navigation Header - Info 1 Prev Next

Return to Maintain Bills

Save Notify Refresh Add Update/Display

22. On the **Header - Info 1** tab, change the **Status** field from **NEW** to **RDY**.
23. Click the **Save** button. Your entries are saved.
24. Cardinal creates the bill when the system date is equal to or greater than the installment bill generate date.