



Accounts Receivable Job Aid

AR323_Entering an Installment Bill (VDOT Only)

Installment Bills Overview

Installment Bills are 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.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.

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Revision History

Revision Date	Summary of Changes
10/1/2025	Baseline.



Accounts Receivable Job Aid

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Creating an Installment Bill

Step	Action
1.	Navigate to the Bill Entry page using the following path: Main Menu > Billing > Maintain Bills > Standard Billing

The **Bill Entry Find an Existing Value Search** page displays.



For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled **Overview of the Cardinal FIN Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

2. Click the **Add a New Value** button.








The **Bill Entry Add a New Value** page displays.

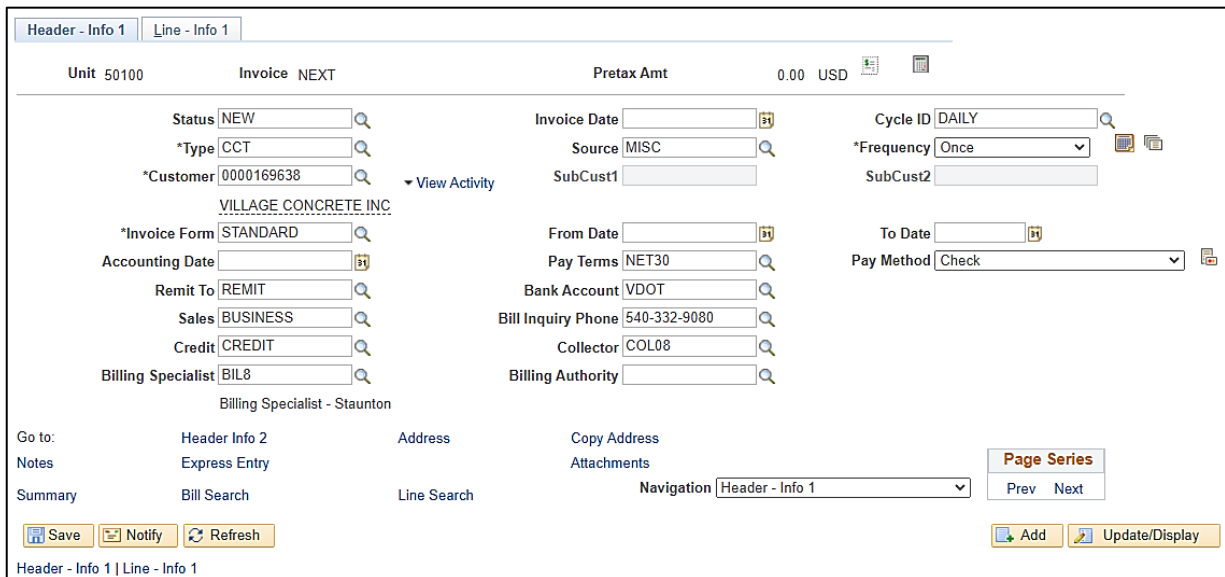



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Step	Action
	If the Business Unit field does not populate by default, enter or select the applicable Business Unit. The Invoice field defaults to "NEXT". Do not change it.
3.	Click the Bill Type Identifier Look up icon and select the applicable Bill Type. 
4.	Click the Bill Source Look up icon and select the applicable Bill Source. 
5.	Click the Customer Look up icon and select the applicable Customer. 
6.	Click the Add button. 

The **Header – Info 1** tab displays.





7.	Click the Cycle ID Look up icon and select "MTH-INSTAL". 
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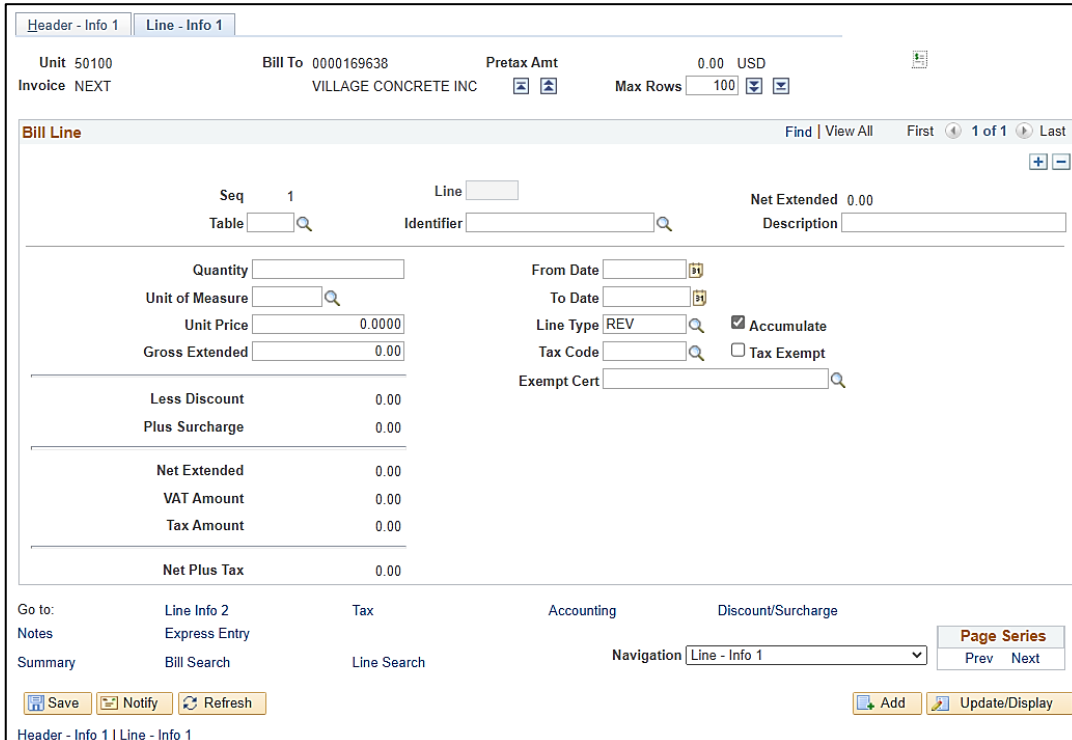


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Step	Action
8.	Click the Frequency dropdown button and select "Installment". 
9.	Click the Line – Info 1 tab. 

The **Line – Info 1** tab displays.



Header - Info 1 | Line - Info 1

Unit 50100 Bill To 0000169638 Pretax Amt 0.00 USD
Invoice NEXT VILLAGE CONCRETE INC Max Rows 100

Bill Line Find | View All First 1 of 1 Last

Seq	Line	Table	Identifier	Description	Net Extended
1	1				0.00

Quantity
Unit of Measure
Unit Price 0.0000
Gross Extended 0.00
Less Discount 0.00
Plus Surcharge 0.00
Net Extended 0.00
VAT Amount 0.00
Tax Amount 0.00
Net Plus Tax 0.00

From Date
To Date
Line Type REV
Tax Code
Exempt Cert
☒ Accumulate
☐ Tax Exempt

Go to: Line Info 2 Tax Accounting Discount/Surcharge
Notes Express Entry
Summary Bill Search Line Search
Navigation Line - Info 1
Page Series
Prev Next
Save Notify Refresh Add Update/Display



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Step	Action
10.	<p>Enter the billing information. At a minimum, enter the following values:</p> <ul style="list-style-type: none">• Table: determines the type of options available in the Identifier field• Identifier: used to select the item being billed and the associated charge distribution• Gross Extended: total amount of the individual Installment Bills
11.	<p>Click the Refresh button.</p>

Bill Line Find | View All First 1 of 1 Last

Seq 1 Line

Table ID Identifier MG&SCONSTR-RICHMND

Net Extended 0.00 Description Misc Gds & Svcs Con-Richmond

Quantity Unit of Measure EA Unit Price 0.0000

Gross Extended 550.00

From Date To Date Line Type REV Accumulate Tax Code Exempt Cert

Save Notify Refresh

Header - Info 1 | Line - Info 1

The **Line – Info 1** tab refreshes displaying additional values based on the previous entries.

Header - Info 1 Line - Info 1

Unit 50100 Invoice NEXT Bill To 0000169638 VILLAGE CONCRETE INC Pretax Amt 550.00 USD Max Rows 100

Bill Line Find | View All First 1 of 1 Last

Seq 1 Line

Table ID Identifier MG&SCONSTR-RICHMND

Net Extended 550.00 Description Misc Gds & Svcs Con-Richmond

Quantity 1.0000 Unit of Measure EA Unit Price 550.0000

Gross Extended 550.00

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

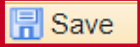
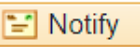
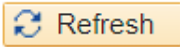
From Date To Date Line Type REV Accumulate Tax Code Exempt Cert

Go to: Line Info 2 Tax Accounting Discount/Surcharge Notes Express Entry Summary Bill Search Line Search

Navigation Line - Info 1 Page Series Prev Next

Save Notify Refresh Add Update/Display

Header - Info 1 | Line - Info 1

Step	Action
12.	<p>Click the Save button.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;">  Save  Notify  Refresh </div> <p>Header - Info 1 Line - Info 1</p>

The page refreshes and the system assigned Invoice ID Number displays at the top of the page.

Header - Info 1
Line - Info 1

Unit 50100

Invoice MISC000489

Bill To 0000169638

VILLAGE CONCRETE INC

13.	<p>Click the Header – Info 1 tab.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; margin-bottom: 5px;"> Header - Info 1 Line - Info 1 </div> <div> <p>Unit 50100</p> <p>Invoice MISC000489</p> </div> </div>
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The **Header – Info 1** tab displays.

Header - Info 1
Line - Info 1

Unit 50100

Invoice MISC000489

Pretax Amt 550.00 USD

Status

*Type

*Customer

*Invoice Form

Accounting Date

Remit To

Sales

Credit

Billing Specialist

Billing Specialist - Staunton

Invoice Date

Source

SubCust1

From Date

Pay Terms

Bank Account

Bill Inquiry Phone

Collector

Billing Authority

Cycle ID

*Frequency

SubCust2

To Date




Pay Method


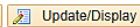
Go to: Header Info 2 Address Copy Address

Notes Express Entry Attachments


Summary Bill Search Line Search

Navigation

 Save
  Notify
  Refresh

 Add
  Update/Display

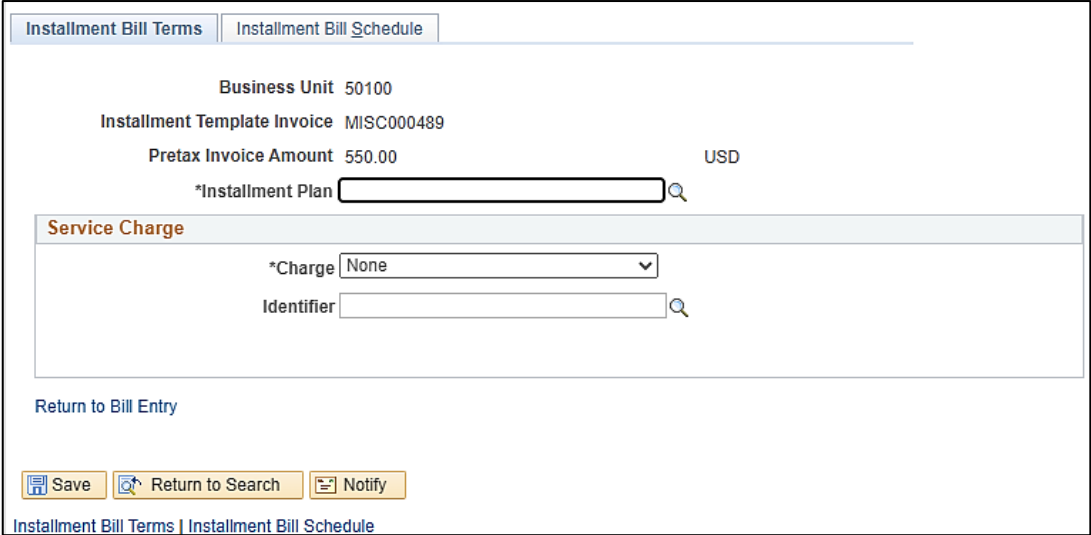
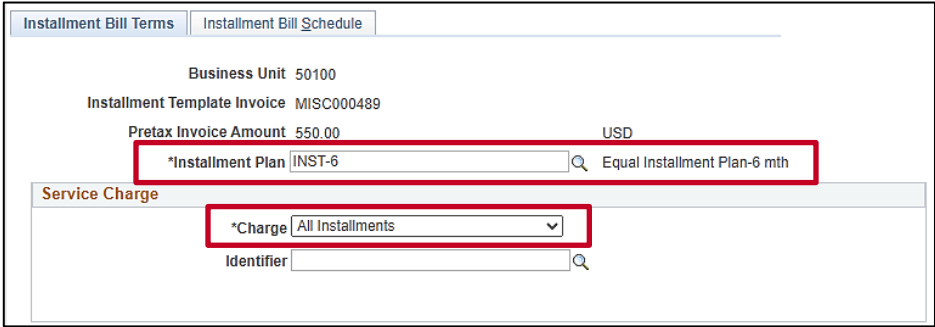

Header - Info 1 | Line - Info 1

14.	<p>Click the Go To Installment Bill Schedule icon.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; margin-bottom: 5px;"> Cycle ID <input type="text" value="MTH-INSTAL"/>  </div> <div> *Frequency <input type="text" value="Installment"/> </div> </div>
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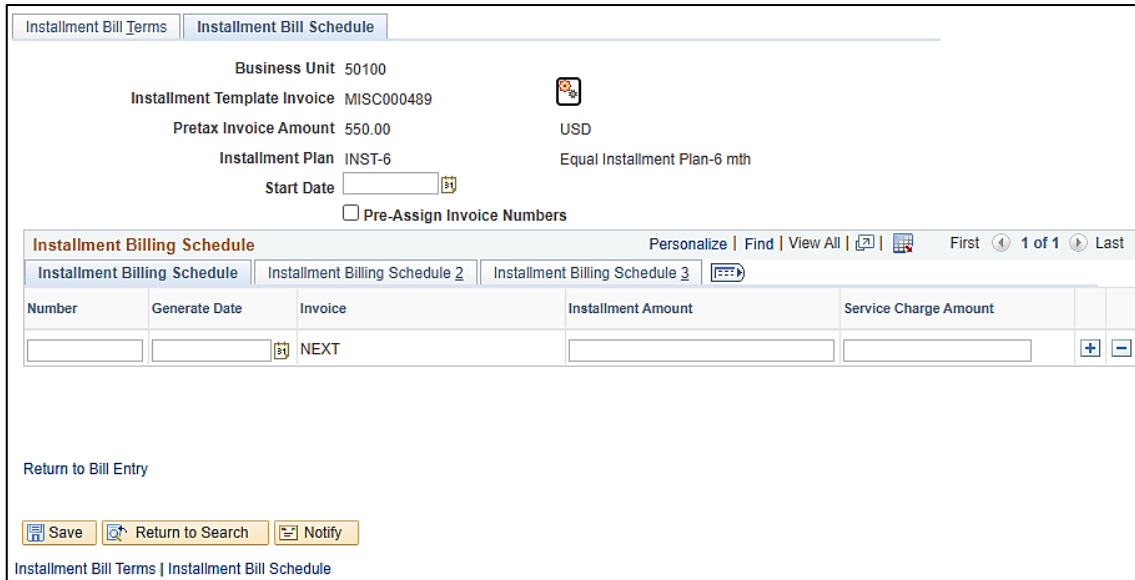
Accounts Receivable Job Aid

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Step	Action
	<p>The Installment Bill Terms tab displays.</p> <div></div>
15.	<p>Enter the Installment Bill terms. At a minimum, enter values for the following fields:</p> <ul style="list-style-type: none">• Installment Plan• Charge <div></div>
16.	<p>Click the Installment Bill Schedule tab.</p> <div></div>

Step	Action
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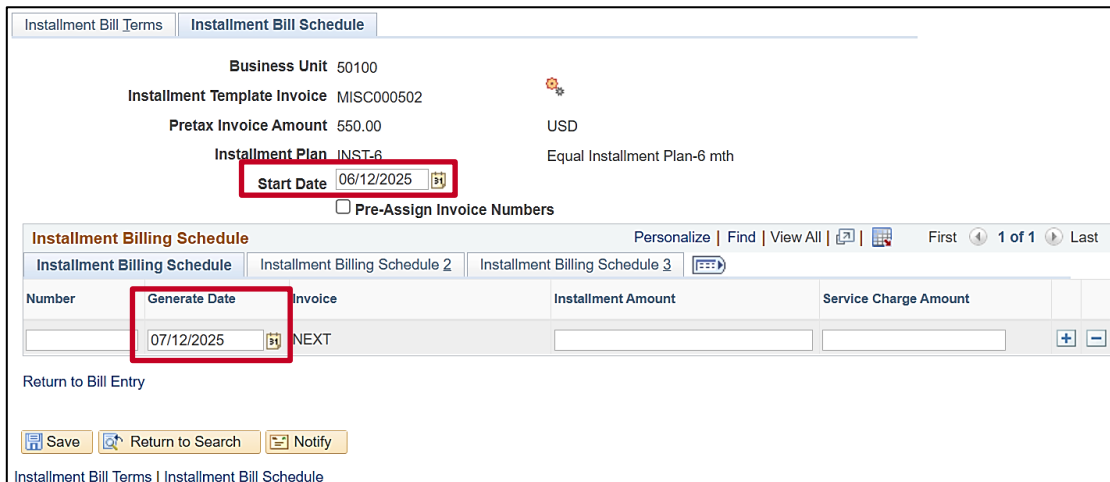
The **Installment Bill Schedule** tab displays.



The screenshot shows the 'Installment Bill Schedule' tab selected. It displays fields for Business Unit (50100), Installment Template Invoice (MISC000489), Pretax Invoice Amount (550.00), Installment Plan (INST-6), and Start Date (empty). Below these is a checkbox for 'Pre-Assign Invoice Numbers'. The 'Installment Billing Schedule' section shows a table with columns: Number, Generate Date, Invoice, Installment Amount, and Service Charge Amount. The first row shows 'NEXT' in the Invoice column. At the bottom are buttons for 'Return to Bill Entry', 'Save', 'Return to Search', and 'Notify'.

17. Enter the billing schedule information in the **Installment Bill Schedule** section. At a minimum, enter values for the following fields:

- **Start Date**
- **Generate Date**


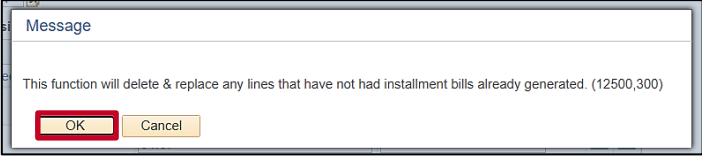
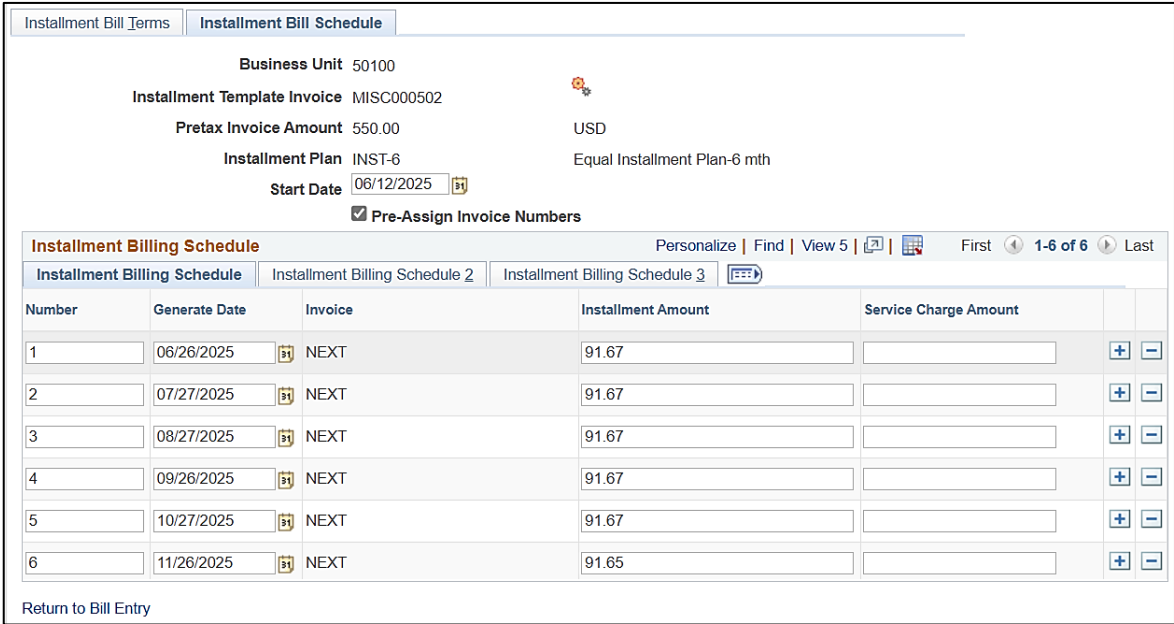

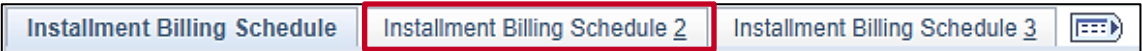


This screenshot is similar to the previous one but with two fields highlighted with red boxes: 'Start Date' (06/12/2025) and 'Generate Date' (07/12/2025). The 'Installment Template Invoice' is now MISC000502. The 'Generate Date' field is in the first row of the 'Installment Billing Schedule' table.

18. Click the **Pre-Assign Invoice Numbers** checkbox option.

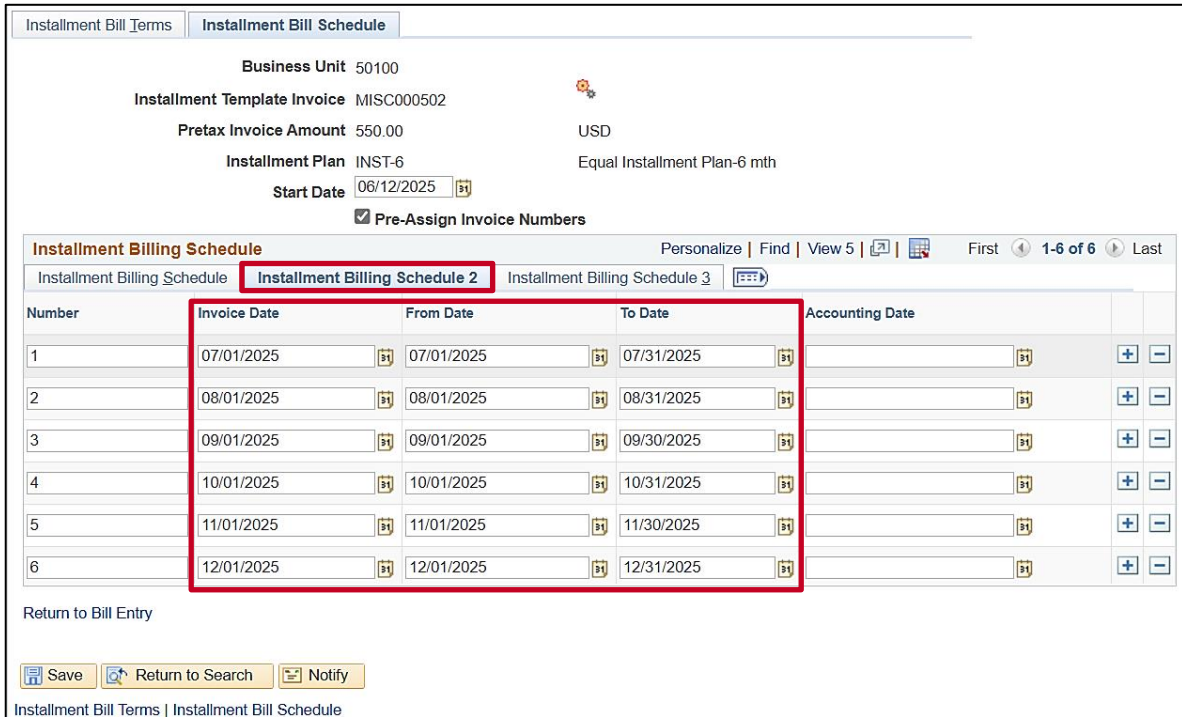


A close-up of the 'Pre-Assign Invoice Numbers' checkbox, which is checked and highlighted with a red box.

Step	Action
19.	<p>Click the Generate Install Bill Schedule icon.</p> 
20.	<p>Click the OK button if a warning message displays.</p> 
<p>The page refreshes with the Installment Billing Schedule rows created. The Generate Date and Installment Amount fields automatically populate based on previous data entered.</p> 	
	<p>Only 5 rows display initially. Click the View All link to view all rows in the Installment Billing Schedule section. The information can be modified as needed. However, the installment amounts must equal the Line amount entered in the Gross Extended field in Step 10. This amount is reflected as the pretax Invoice amount.</p>
21.	<p>Click the Installment Billing Schedule 2 tab.</p> 

Step	Action
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The **Installment Billing Schedule 2** tab displays the **Invoice Date**, **From Date**, and **To Date** fields for each installment.



Business Unit 50100
 Installment Template Invoice MISC000502
 Pretax Invoice Amount 550.00 USD
 Installment Plan INST-6 Equal Installment Plan-6 mth
 Start Date 06/12/2025
☒ Pre-Assign Invoice Numbers

Installment Billing Schedule Personalize | Find | View 5 | First 1-6 of 6 Last

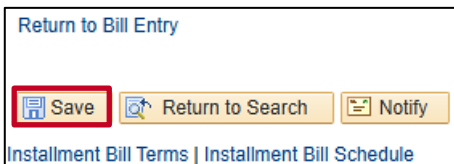
Installment Billing Schedule **Installment Billing Schedule 2** Installment Billing Schedule 3

Number	Invoice Date	From Date	To Date	Accounting Date
1	07/01/2025	07/01/2025	07/31/2025	
2	08/01/2025	08/01/2025	08/31/2025	
3	09/01/2025	09/01/2025	09/30/2025	
4	10/01/2025	10/01/2025	10/31/2025	
5	11/01/2025	11/01/2025	11/30/2025	
6	12/01/2025	12/01/2025	12/31/2025	

Return to Bill Entry

Installment Bill Terms | Installment Bill Schedule

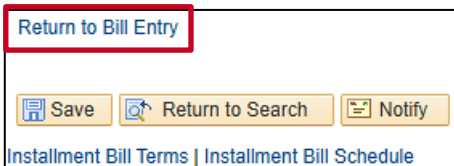
22. Click the **Save** button.



Return to Bill Entry

Installment Bill Terms | Installment Bill Schedule

23. Click the **Return to Bill Entry** link.



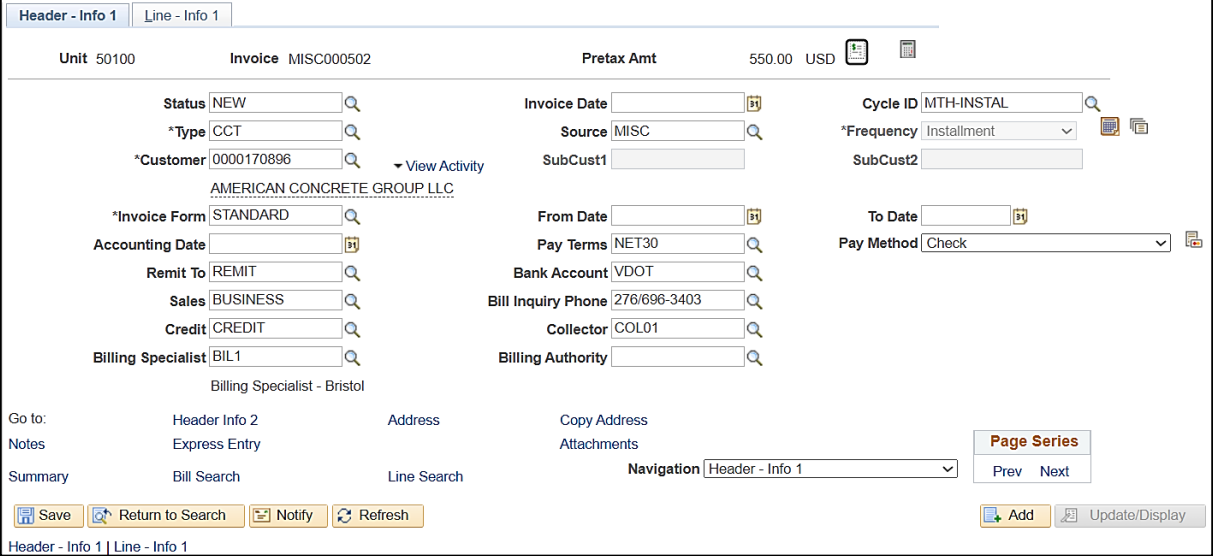

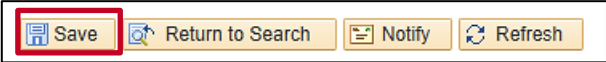

[Return to Bill Entry](#)

Installment Bill Terms | Installment Bill Schedule



Accounts Receivable Job Aid

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Step	Action
	<p>The Header – Info 1 tab displays.</p> <div></div>
24.	<p>Click the Status Look up icon and select “RDY”.</p> <div></div>
25.	<p>Click the Save button to save the entries.</p> <div></div>
	<p>Cardinal creates the Bill when the system date is equal to or greater than the Installment Bill generate date.</p>