

AR323_Entering a Recurring Bill (VDOT Only)

Entering a Recurring Bill Overview

Recurring bills allow for the reproduction of bills, or portions of bills, and the generation of Invoices by using templates. Associating a recurring bill template with a predefined schedule (using the Recurring Schedule fields) allows the user to control when and how often recurring bills are generated. Schedules automate and control the generation of recurring bills. Bills are generated monthly in Cardinal.

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.

Table of Contents

Revision History	2
Creating a Recurring Bill	3



AR323_Entering a Recurring Bill (VDOT Only)

Revision History

Revision Date	Summary of Changes
8/14/2024	Baseline.



AR323_Entering a Recurring Bill (VDOT Only)

Creating a Recurring Bill

Step	Action
1.	Navigate to the Bill Entry page using the following path:
	Main Menu > Billing > Maintain Bills > Standard Billing
The Bill E	ntry Find an Existing Value page displays.
	Bill Entry Find an Existing Value Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. Recent Searches Choose from recent searches
	Business Unit = v Invoice begins with v Bill Status = v Customer begins with v Contract begins with v Bills in Business Unit = v Template Invoice Flag = v Show fewer options Case Sensitive Search Clear
ĺ	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 Add a	New Value page displays.
Bill E	ntry
Ad	Id a New Value
	*Business Unit



Step	Action
i	If the Business Unit field does not default, enter or select the applicable Business Unit. The Invoice field defaults to "NEXT". Do not change it.
3.	Enter or select the appropriate Bill Type using the Bill Type Identifier Look Up icon.
	Bill Type Identifier
4.	Enter or select the appropriate Bill Source using the Bill Source Look Up icon.
	Bill Source
5.	Enter or select the applicable Customer using the Customer Look Up icon.
	Customer
6.	Click the Add button.
The Heade	er – Info 1 tab displays.
Head	er - Info 1 Line - Info 1
	Unit 50100 Invoice NEXT Pretax Amt 0.00 USD
	Status NEW Q Invoice Date Cycle ID DAILY Q
	*Type STA Q Source MG&SE Q *Frequency Once v II III SubCust2
	Ann D LLC
	*Invoice Form STANDARD Q From Date B To Date B
	Accounting Date Pay Terms NET30 Q Pay Method Check V
	Remit To REMIT Q Bank Account VDOT Q Sales BUSINESS Q Bill Inquiry Phone 804-371-7435 Q
	Credit CREDIT Q Collector COL01 Q
	Billing Specialist Q Billing Authority Q
Go to:	Header Info 2 Address Copy Address
Notes	Express Entry Attachments Page Series
Summa	rry Bill Search Line Search Navigation Header - Info 1 Y Prev Next
🖪 Sa	we 🔄 Notify 🖉 Refresh
Header	- Info 1 Line - Info 1
7.	Click the Cycle ID Look Up icon and select "MTH-RECUR".
	Cycle ID MTH-RECUR



Step	Action
8.	Click the Frequency dropdown button and select the Recurring list item.
	*Frequency Recurring ~
9.	Click the Save button.
	Refresh
The Head	
	er – Info 1 tab refreshes and the Invoice Number is assigned.
Header - Inf Unit	
10.	Create the recurring bill schedule by clicking the Go To Recurring Bill Schedule icon.
	ring Bill Schedules page displays.
Recu	Ting Bill Schedules Business Unit 50100 Template Invoice MGSE004189
	Start Date 13 Pre-Assign Invoice Numbers
Recurri	ng Schedule Find View All First (1 of 1) Last
Genera	Invoice Date Invoice Inv Generated? Date Image: State
	Bill Header From Date
Return to	Bill Entry
i	Note: Use the Recurring Bill Schedules page to create a recurring bill schedule and to pre- assign Invoice Numbers.



Step	Action
11.	Enter or select the applicable start date using the Start Date Calendar icon. Start Date
12.	Enter or select the applicable end date using the End Date Calendar icon. End Date
13.	Enter or select the applicable generate date using the Generate Date Calendar icon.
14.	Enter or select the applicable Invoice date using the Invoice Date Calendar icon.
15.	Enter or select the applicable Bill Header from date using the Bill Header From Date Calendar icon. Bill Header From Date
16.	Enter or select the applicable to date using the To Date Calendar icon. To Date Image: Calendar icon
17.	Click the Pre-assign Invoice Numbers checkbox option to create the Invoice Numbers for the bills.
18.	Click the Generate Recur Bill Schedule icon and click the OK button on any messages that display.



5	Step	Actio	ı				
The	The Schedule Lines appear in the Recurring Schedule section.						
	Recurring S	Schedule			Find Vi	ew All First (🜒 1-2 of 5 🕟 Last
	Generate Da	ate	Invoice Date	Invoice	Inv Generated?	Date	+ -
	05/27/2024		06/01/2024	NEXT	N	Dute	
			Bill Header Fro	m Date 06/01/2024 🛐	To Date 06/30/2024		
	Generate Da	-	Invoice Date	Invoice	Inv Generated?	Date	+ -
	06/26/2024		07/01/2024	NEXT	Ν	Date	
			Bill Header Fro	m Date 07/01/2024 🛐	To Date 07/31/2024		
 	19.	Clink	ha View All link to	and the Cohodula Li			
	19.		ne view All link lo	see the Schedule Li			
		Find	View All	First 🕢 1-2 of 5	East		
					Jedor		
	<u> </u>						
All	Schedu	le Lines	s of the recurring s	schedule display.			
	Recurrin	ig Schedule	9		Find Vi	iew 2 🛛 First 🧃) 1-5 of 5 🕑 Last
	Generat	e Date	Invoice Date	Invoice	Inv Generated?	Date	+ -
	05/27/20		06/01/2024	NEXT	N		
			Bill Header F	rom Date 06/01/2024	To Date 06/30/2024		
	Generat	e Date	Invoice Date	Invoice	Inv Generated?	Date	+ -
	06/26/20	024 🛐	07/01/2024	NEXT	N		
			Bill Header F	rom Date 07/01/2024	To Date 07/31/2024		
	Generat	e Date	Invoice Date	Invoice	Inv Generated?	Date	+ -
	07/27/20	024 🛐	08/01/2024	NEXT	Ν		
			Bill Header F	rom Date 08/01/2024	To Date 08/31/2024		
	Generat	e Date	Invoice Date	Invoice	Inv Generated?	Date	+ -
	08/27/20	024 🛐	09/01/2024	NEXT	N		
			Bill Header F	rom Date 09/01/2024	To Date 09/30/2024		
	Generat	e Date	Invoice Date	Invoice	Inv Generated?	Date	+ -
	09/26/20	024 🛐	10/01/2024	NEXT	Ν		
			Bill Header F	rom Date 10/01/2024	To Date 10/31/2024		
	20.	Click t	he Save button to	generate the recurrin	g schedule.		
		🔚 Sa	ave 🛛 💽 Return to S	Search 🔡 Notify			
		I					



AR323_Entering a Recurring Bill (VDOT Only)

Step	Action	
21.	Click the Return to Bill E	Entry link at the bottom of the page.
	Return to Bill Entry	

The Header – Info 1 tab displays.

Unit 50100	Invoice MGSE0	04189	Pretax	Amt 0.0	00 USD 🖭 🔳			
Status	NEW	Q	Invoice Date	31	Cycle ID	ITH-RECUR		Q
*Туре	STA	Q	Source MC	G&SE	*Frequency	Recurring	~	
*Customer	0000167446	🔍 🗸 View Activit	y SubCust1		SubCust2			
	Ann D LLC							
*Invoice Form	STANDARD	Q	From Date	31	To Date		31	
Accounting Date	•	31	Pay Terms NE	T30 🔍	Pay Method	Check		✓ Ⅰ
Remit To	REMIT	Q	Bank Account VI	OT Q				
Sales	BUSINESS	Q	Bill Inquiry Phone 80	4-371-7435 🔍				
Credit	CREDIT	Q	Collector CC	DL01				
Billing Specialist	1	Q	Billing Authority	Q				
io to: Head	ler Info 2	Address	Copy Addre	ISS				
lotes Expre	ess Entry		Attachment	s		Pa	ge Series	
ummary Bill S	earch	Line Search	I	Navigation Header - Inf	fo 1	✓ Pr	ev Next	
Return to Sea	arch 📰 Notify	C Refresh					Add IT	Lindata/Diaplay
		Reliesh				•••	Add	Update/Display
leader - Info 1 Line - Info 1								
2. Click the	e Line – In	fo 1 tab.						



AR323_Entering a Recurring Bill (VDOT Only)

Step	

Action

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ne – Into	1 tab displa	ays.				
Header - Info 1	Line - Info 1					
Unit 50100 Invoice MGSE0	004189	Bill To 0000167446 Ann D LLC	Pretax Amt		00 USD 100 \$ 1	E.
Bill Line					Find View All	First 🕢 1 of 1 🕑 Last
						+ -
	Seq	1 L	ine		Net Extended 0.00	
	Table	 Q Identi	ier	Q	Description	
	Quantity		From Date) II		
	Unit of Measure	Q	To Date			
	Unit Price		Line Type		Accumulate	
	Gross Extended	0.00	Tax Code		Tax Exempt	
	Less Discount	0.00	Exempt Cer	t	Q	
	Plus Surcharge	0.00				
	curonarge	0.00				
	Net Extended	0.00				
	VAT Amount	0.00				
	Tax Amount	0.00				
-	Net Plus Tax	0.00				
Go to:	Line Info 2	Tax	Accoun	ting	Discount/Surcharge	
Notes	Express Entry					Page Series
Summary	Bill Search	Line Search		Navigation Line	e - Info 1	 Prev Next
Sava St	Return to Search	E Notify 2 Refresh				Add 🖉 Update/Display
		rvenesii				22 OpuaterDisplay
Header - Info 1	Line - Inio 1					
Clic	< the Table	Look Up icon.				
		0				
Tal	ble	Q				
ok Up Ta	able page c	lisplays.				
		Look	Up Table			
		Select o	ne of the follov	ing values:		
		D Diec	ount Table			
		ID PS/E	Billing Charge I	d		
					1	
		S Surc	harge Table			
			harge Table			
		S Surc				



AR323_Entering a Recurring Bill (VDOT Only)

Step	Action
Í	The Table field determines the options available in the Identifier field. The "Discount Table" and "Surcharge Table" are not used in Cardinal.
25.	Click the ID PS/Billing Charge Id link. ID PS/Billing Charge Id
26.	Click the Identifier Look Up icon.

The Look Up Identifier page displays.

SetID Billing Currency Identifier begins witt Description begins witt						
Identifier begins with Description begins with	h ♥					
Identifier begins with Description begins with	h ♥					
Description begins with	h 🗸					
Look Up Clear	Cancel					
	Cancer	Basic Lookup				
Search Results						
View 100			First (1-14	6 of 146 💿 Last	
Identifier	Effective Date	Description	Unit of Measure		Distribution Code	
AUDIT1	01/01/1901	Audit - HMO - OTH	EA	0	AUDITAUDIT	
AUDIT2	01/01/1901	Audit - CON - OTH	EA	0	AUDITAUDI2	
DECALSCVSS	01/02/1901	Decals/Signs - CVSS	EA	0	DECALS	
DMVGRNT	01/02/1901	DMV Open Container Grant	EA	0	DMVGRANT	
EQUIPPROPDMGAR-01	12/01/2015	EQUIPPROPDMGAR-Bristol	EA	0	EQREP-01	
EQUIPPROPDMGAR-02	12/01/2015	EQUIPPROPDMGAR-Salem	EA	0	EQREP-02	
EQUIPPROPDMGAR-03	12/01/2015	EQUIPPROPDMGAR-Lynchburg	EA	0	EQREP-03	
EQUIPPROPDMGAR-04	12/01/2015	EQUIPPROPDMGAR-Richmond	EA	0	EQREP-04	
EQUIPPROPDMGAR-05	12/01/2015	EQUIPPROPDMGAR-Hampton Roads	EA	0	EQREP-05	
EQUIPPROPDMGAR-06	12/01/2015	EQUIPPROPDMGAR-Fredericksburg	EA	0	EQREP-06	
EQUIPPROPDMGAR-07	12/01/2015	EQUIPPROPDMGAR-Culpeper	EA	0	EQREP-07	
EQUIPPROPDMGAR-08	12/01/2015	EQUIPPROPDMGAR-Staunton	EA	0	EQREP-08	
EQUIPPROPDMGAR-09	12/01/2015	EQUIPPROPDMGAR-NOVA	EA	0	EQREP-09	
EQUIPPROPDMGST-01	12/01/2015	EQUIPPROPDMGST-Bristol	EA	0	EQREP-10	
EQUIPPROPDMGST-02	12/01/2015	EQUIPPROPDMGST-Salem	EA	0	EQREP - 11	
EQUIPPROPDMGST-03	12/01/2015	EQUIPPROPDMGST-Lynchburg	EA	0	EQREP - 12	
EQUIPPROPDMGST-04	12/01/2015	EQUIPPROPDMGST-Richmond	EA	0	EQREP - 13	
EQUIPPROPDMGST-05	12/01/2015	EQUIPPROPDMGST-Hampton Roads	EA	0	EQREP - 14	
EQUIPPROPDMGST-06	12/01/2015	EQUIPPROPDMGST-Fredericksburg	EA	0	EQREP - 15	
EQUIPPROPDMGST-07	12/01/2015	EQUIPPROPDMGST-Culpeper	EA	0	EQREP - 16	
EQUIPPROPDMGST-08	12/01/2015	EQUIPPROPDMGST-Staunton	EA	0	EQREP - 17	
EQUIPPROPDMGST-09	12/01/2015	EQUIPPROPDMGST-NOVA	EA	0	EQREP - 18	
EQUIPWOREPAIRAR	01/01/1901	Equipment Workorder Repair A/R	EA	0	EQREPEQREP	



Step	Action
i	The Identifier is used to select the item that is being billed and the associated charge distribution.
27.	Use the Identifier field to narrow down the search results as needed.

The Look Up Identifier page refreshes and the search results display.

						Help
SetIE	0	50100				
Billing Currency	у	USD				
Identifie	r begins with	PRO				
Description	n begins with					
		<u> </u>				
Look Up	Clear	Cancel	Basic Lookup			
Search Resu	ilts					
View 100				First	1-	19 of 19 🕟 Last
		Effective		Unit of	List	Distribution
ldentifier		Date	Description	Measure	Price	Code
PROPDMGAR-	BRISTOL	01/01/1901	Property Damage A/R - Bristol	EA	0	CALCUCAL01
PROPDMGAR-	CULPEPER	01/01/1901	Property Damage A/R - Culpeper	EA	0	CALCUCAL07
PROPDMGAR-	FREDERIC	01/01/1901	Property Damage A/R - Frederic	EA	0	CALCUCAL06
PROPDMGAR-	HAMPTRDS	01/01/1901	Property Damage A/R - HamptRds	EA	0	CALCUCAL05
PROPDMGAR-	LYNCHBRG	01/01/1901	Property Damage A/R - Lynchbrg	EA	0	CALCUCAL03
PROPDMGAR-	NOVA	01/01/1901	Property Damage A/R - NOVA	EA	0	CALCUCAL09
PROPDMGAR-	RICHMOND	01/01/1901	Property Damage A/R - Richmond	EA	0	CALCUCAL04
PROPDMGAR-	SALEM	01/01/1901	Property Damage A/R - Salem	EA	0	CALCUCAL02
PROPDMGAR-	STAUNTON	01/01/1901	Property Damage A/R - Staunton	EA	0	CALCUCAL08
PROPDMGAR-	TOLL	01/01/1901	Property Damage A/R - Toll	EA	0	CALCUCAL34
PROPDMGST-	BRISTOL	01/01/1901	Property Damage StAgy-Bristol	EA	0	CALCUCAL10
PROPDMGST-	CULPEPER	01/01/1901	Property Damage StAgy-Culpeper	EA	0	CALCUCAL16
PROPDMGST-	FREDERIC	01/01/1901	Property Damage StAgy-Frederic	EA	0	CALCUCAL15
PROPDMGST-	HAMPTRDS	01/01/1901	Property Damage StAgy-HamptRds	EA	0	CALCUCAL14
PROPDMGST-	LYNCHBRG	01/01/1901	Property Damage StAgy-Lynchbrg	EA	0	CALCUCAL12
PROPDMGST-	NOVA	01/01/1901	Property Damage StAgy-NOVA	EA	0	CALCUCAL18
PROPDMGST-	RICHMOND	01/01/1901	Property Damage StAgy-Richmond	EA	0	CALCUCAL13
PROPDMGST-	SALEM	01/01/1901	Property Damage StAgy-Salem	EA	0	CALCUCAL11
			Property Damage StAgy-Staunton	EA		CALCUCAL17



Actio	า							
Click t	he correspo	onding I	ink to select the app	licable l	dentif	ier.		
Look U	p Identifier					2	c	
						Help)	
	SetID	50100						
Billing Cu	irrency	USD						
	entifier begins with							
Desc	cription begins with	×						
Look	Look Up Clear Cancel Basic Lookup							
Search	Results							
View 100				Fir	rst 🕢	1-19 of 19 🕟 Last		
Identifier		Effective	Description	Unit of	List	Distribution		
		Date	Description	Measure	Price	Code		
	IGAR-BRISTOL	01/01/1901	Property Damage A/R - Bristol	EA	0	CALCUCAL01		
	IGAR-CULPEPER	01/01/1901	Property Damage A/R - Culpepe Property Damage A/R - Frederic		0	CALCUCAL07 CALCUCAL06		
	IGAR-HAMPTRDS		Property Damage A/R - HamptR		0	CALCUCAL05		
PROPDM	IGAR-LYNCHBRG	01/01/1901	Property Damage A/R - Lynchbrg		0	CALCUCAL03		
	IGAR-NOVA	01/01/1901	Property Damage A/R - NOVA	EA	0	CALCUCAL09		
and a second sec	IGAR-RICHMOND	01/01/1901 01/01/1901	Property Damage A/R - Richmor Property Damage A/R - Salem	EA EA	0	CALCUCAL04 CALCUCAL02		
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Step	Action
29.	Enter the applicable number in the Quantity field.
	Quantity 2
30.	Enter the total amount of all recurring bills in the Gross Extended field.
	Gross Extended 38,000.00
31.	Click the Refresh button.
	Refresh

The Line - Info 1 tab refreshes.

Unit 50100 Invoice MGSE	004189	Bill To 0000167446 Ann D LLC	Pretax Amt	· · · · · · · · · · · · · · · · · · ·	00 USD 100 🐺 🖭		
Bill Line					Find View A	All First 🕢 1 of 1 🕑 Last	1
						+ -	
	Seq	1	Line		Net Extended 38	.000.00	
	Table	ID Q	Identifier BULLNOSE1-04	Q	Description Bu	INoseTerm-HCRichmond	
	Quantity	2.0000	From Date	ij			
	Unit of Measure	EA	To Date) I			
	Unit Price	19,000.0000	Line Type	REV	🗹 Accumulate		
	Gross Extended	38,000.00	Tax Code	Q	Tax Exempt		
			Exempt Cert		Q		
	Less Discount	0.00					
	Plus Surcharge	0.00					
	Net Extended	38,000.00					
	VAT Amount	0.00					
	Tax Amount	0.00					
	Net Plus Tax	38,000.00					
Go to:	Line Info 2	Tax	Accounti	ng	Discount/Surcharge		
Notes	Express Entry	r				Page Series	
Summary	Bill Search	Line Sea	arch	Navigation Line	e - Info 1	Prev Next	
🔚 Save 🛛 🖸	Return to Search	E Notify 2 Refres	h		[Add Dy Update/Display	
Header - Info 1						(and the second second	1
rieduer - IIIIO T	Line - Into T						_
Click	the Heade	er – Info 1 tal	า				
CIICK	ine neaue		J.				



Step	Action					
The Header – Info 1 tab redisplays.						
Head	ier - Info 1					
	Unit 50100 Invoice MGSE004189 Pretax Amt 38,000.0 USD 🛄					
	Status NEW Invoice Date *Type STA Source MG&SE *Type STA Source MG&SE *Customer 0000167446 View Activity SubCust1 SubCust2 Ann D LLC *Invoice Form STANDARD From Date *Invoice Form STANDARD Pay Terms NET30 Pay Method Check Remit To REMIT Sales BUSINESS Sill Inquiry Phone 804-371-7435 Credit CREDIT Collector COL01 Billing Specialist					
Go to: Notes Summ Heade	Header Info 2 Address Copy Address Express Entry Attachments Page Series ary Bill Search Line Search Navigation Header - Info 1 Prev					
33.	Change the status from "NEW" to "RDY" using the Status Look Up icon. Status RDY					
34.	Click the Save button.					
	Image: Save Image: Sav					
i	Cardinal creates the bill when the system date is equal to or greater than the recurring bill generate date.					