



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.

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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Accounts Receivable Job Aid

AR323_Entering an Installment Bill (VDOT Only)

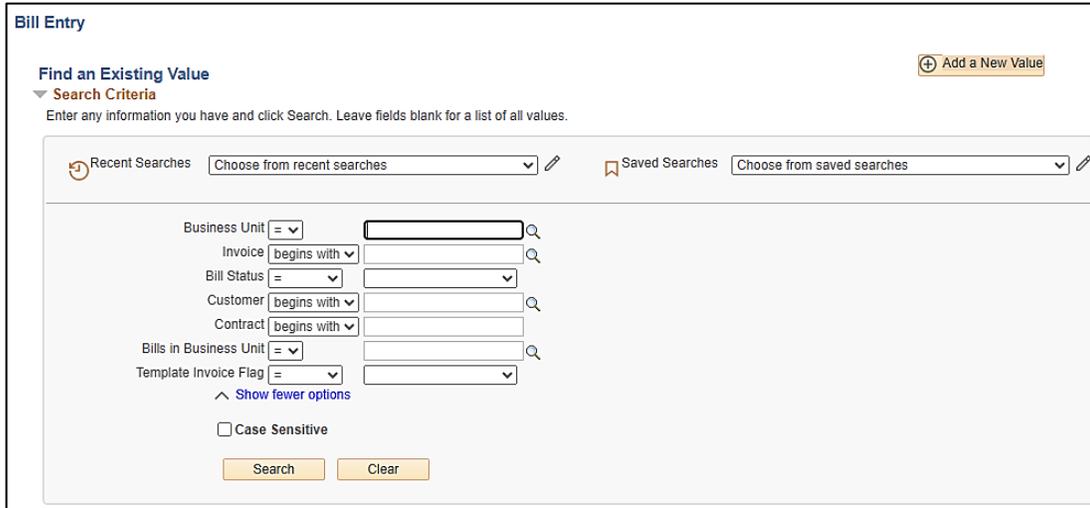
Revision History

Revision Date	Summary of Changes
7/6/2025	Baseline.

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** page displays.



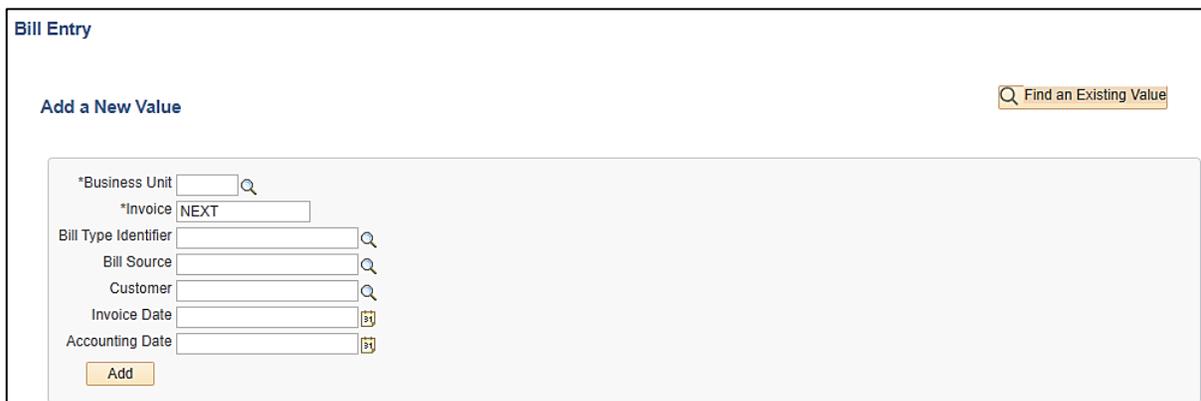

For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled "Overview of the Cardinal FIN Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning.

2.

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

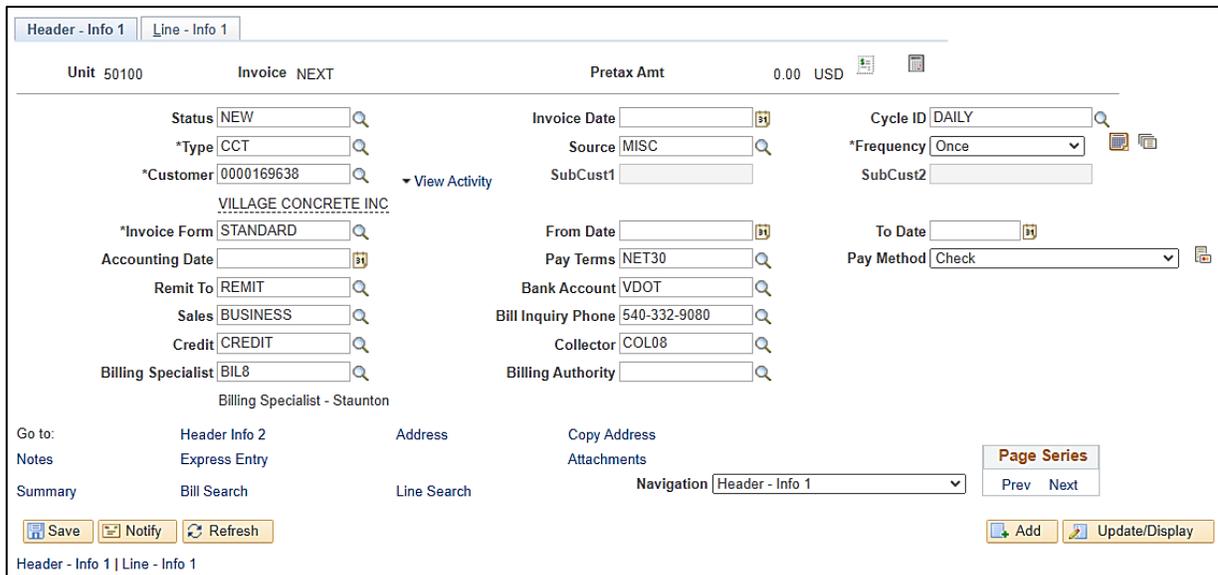


The **Add a New Value** page displays.



Step	Action
	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. 
4.	Enter or select the appropriate Bill Source using the Bill Source Look Up icon. 
5.	Enter or select the applicable Customer using the Customer Look Up icon. 
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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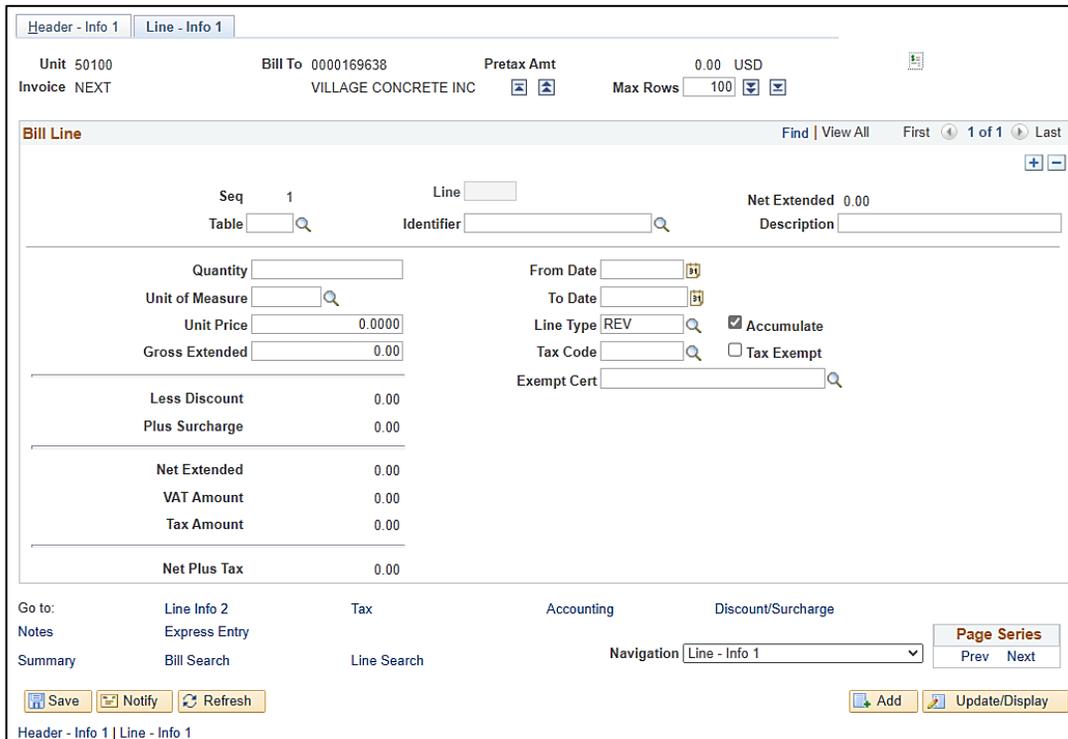


Accounts Receivable Job Aid

AR323_Enter an Installment Bill (VDOT Only)

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

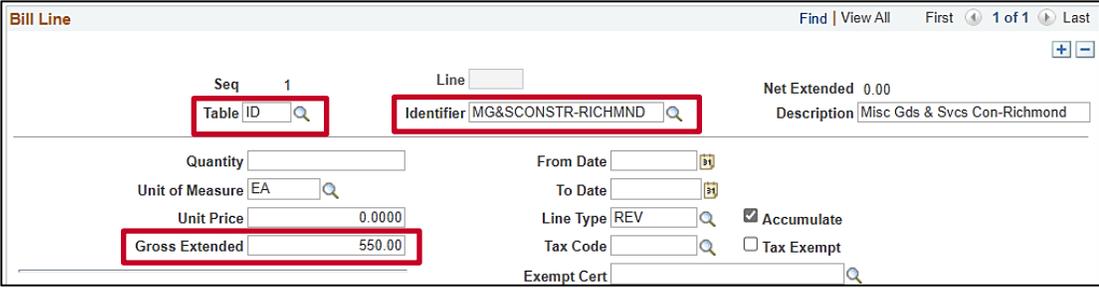
The **Line – Info 1** tab displays.



The screenshot shows the 'Line - Info 1' tab selected. The interface includes a header with 'Unit 50100', 'Invoice NEXT', 'Bill To 0000169638', 'VILLAGE CONCRETE INC', 'Pretax Amt 0.00 USD', and 'Max Rows 100'. Below this is a 'Bill Line' section with search and navigation options. The main area contains a table with the following data:

Seq	1	Line	Net Extended
Table		Identifier	0.00
Quantity		From Date	
Unit of Measure		To Date	
Unit Price	0.0000	Line Type	REV
Gross Extended	0.00	Tax Code	
Less Discount	0.00	Exempt Cert	
Plus Surcharge	0.00		
Net Extended	0.00		
VAT Amount	0.00		
Tax Amount	0.00		
Net Plus Tax	0.00		

At the bottom, there are navigation buttons: 'Save', 'Notify', 'Refresh', 'Add', and 'Update/Display'. A 'Page Series' button with 'Prev' and 'Next' options is also present.

Step	Action
10.	<p>Enter the billing information. At a minimum, enter the following values:</p> <ol style="list-style-type: none"> a. Table: determines the type of options available in the Identifier field b. Identifier: used to select the item being billed and the associated charge distribution c. Gross Extended: total amount of the individual installment bills <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  </div>
11.	<p>Click the Refresh button.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  </div>

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

Unit 50100
Bill To 0000169638
Pretax Amt 550.00 USD

Invoice NEXT
VILLAGE CONCRETE INC
Max Rows 100

Bill Line Find | View All First 1 of 1 Last

Seq 1 Line Net Extended 550.00

Table Identifier Description

Quantity

Unit of Measure

Unit Price

Gross Extended

From Date

To Date

Line Type Accumulate

Tax Code

Tax Exempt

Exempt Cert

Less Discount	0.00
Plus Surcharge	0.00
<hr/>	
Net Extended	550.00
VAT Amount	0.00
Tax Amount	0.00
<hr/>	
Net Plus Tax	550.00

Go to: [Line Info 2](#) [Tax](#) [Accounting](#) [Discount/Surcharge](#)

Notes [Express Entry](#)

Summary [Bill Search](#) [Line Search](#)

Navigation

Page Series

[Prev](#) [Next](#)

[Save](#) [Notify](#) [Refresh](#)

[Add](#) [Update/Display](#)

Header - Info 1 | Line - Info 1

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

Cardinal updates the **Invoice** ID with the next sequential number available.

Header - Info 1
Line - Info 1

Unit 50100

Invoice MISC000489

Bill To 0000169638

VILLAGE CONCRETE INC

13.	Click the Header – Info 1 tab. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">  <p style="text-align: center;">Unit 50100</p> <p>Invoice MISC000489</p> </div>
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The **Header – Info 1** tab redisplay.

Header - Info 1
Line - Info 1

Unit 50100 Invoice MISC000489

Pretax Amt 550.00 USD

Status

*Type

*Customer View Activity

*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

Page Series

Prev Next

Save Notify Refresh

Add Update/Display

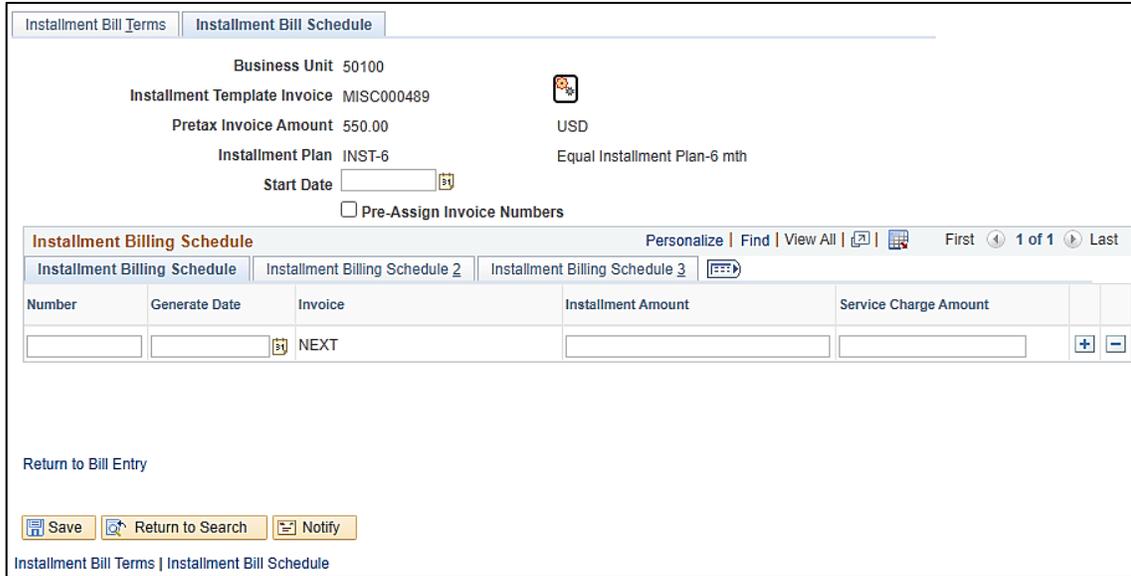
Header - Info 1 | Line - Info 1

14.	Click the Go To Installment Bill Schedule icon. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">  </div>
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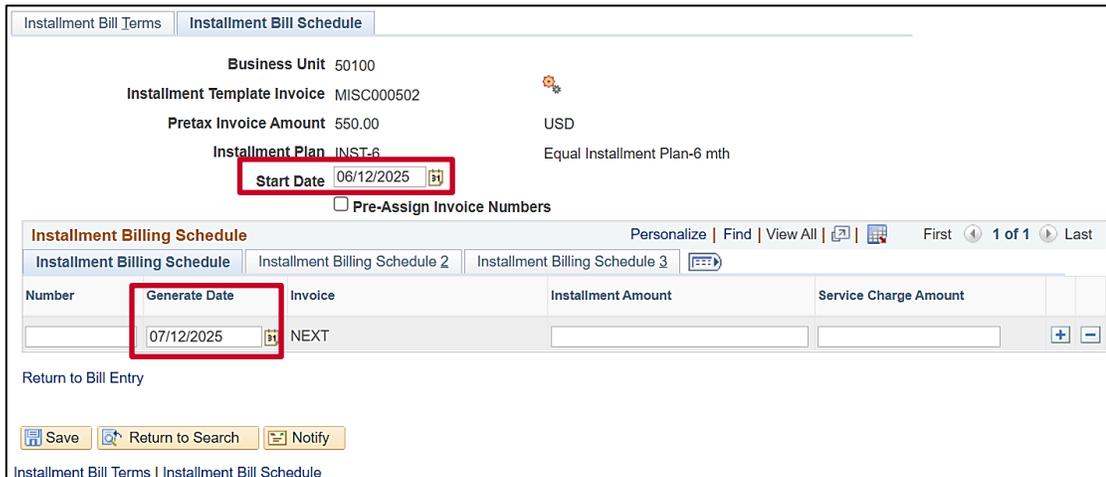
Step	Action
	<p>The Installment Bill Terms tab displays.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <div style="display: flex; border-bottom: 1px solid #ccc; margin-bottom: 10px;"> Installment Bill Terms Installment Bill Schedule </div> <div style="text-align: center;"> <p>Business Unit 50100</p> <p>Installment Template Invoice MISC000489</p> <p>Pretax Invoice Amount 550.00 USD</p> <p>*Installment Plan <input style="width: 150px;" type="text" value=""/> <input type="button" value="Q"/></p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Service Charge</p> <p>*Charge <input style="width: 100px;" type="text" value="None"/> <input type="button" value="v"/></p> <p>Identifier <input style="width: 150px;" type="text" value=""/> <input type="button" value="Q"/></p> </div> <p style="margin-top: 10px;">Return to Bill Entry</p> <div style="display: flex; justify-content: center; gap: 10px; margin-top: 10px;"> <input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Notify"/> </div> <p style="font-size: small; margin-top: 5px;">Installment Bill Terms Installment Bill Schedule</p> </div>
15.	<p>Enter the Installment Bill Terms. At a minimum, enter values for the following fields:</p> <ol style="list-style-type: none"> a. Installment Plan b. Charge <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <div style="display: flex; border-bottom: 1px solid #ccc; margin-bottom: 10px;"> Installment Bill Terms Installment Bill Schedule </div> <div style="text-align: center;"> <p>Business Unit 50100</p> <p>Installment Template Invoice MISC000489</p> <p>Pretax Invoice Amount 550.00 USD</p> <p>*Installment Plan <input style="width: 150px;" type="text" value="INST-6"/> <input type="button" value="Q"/> Equal Installment Plan-6 mth</p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Service Charge</p> <p>*Charge <input style="width: 100px;" type="text" value="All Installments"/> <input type="button" value="v"/></p> <p>Identifier <input style="width: 150px;" type="text" value=""/> <input type="button" value="Q"/></p> </div> </div>
16.	<p>Click the Installment Bill Schedule tab.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <div style="display: flex; border-bottom: 1px solid #ccc;"> Installment Bill Terms Installment Bill Schedule </div> </div>

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



17. Enter the billing schedule information in the **Installment Bill Schedule** section. At a minimum, enter the following values:
- a. **Start Date**
 - b. **Generate Date**



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



Step	Action
19.	Click the Generate Install Bill Schedule icon. 
20.	Click the OK button if a warning message displays. 

Installment Billing Schedule rows are created with the **Generate Date** and **Installment Amount** fields populated.

Installment Bill Terms
Installment Bill Schedule

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

Personalize | Find | View 5 |  | 
First 1-6 of 6 Last

Installment Billing Schedule
Installment Billing Schedule 2
Installment Billing Schedule 3


Number	Generate Date	Invoice	Installment Amount	Service Charge Amount	
1	06/26/2025 	NEXT	91.67		+ -
2	07/27/2025 	NEXT	91.67		+ -
3	08/27/2025 	NEXT	91.67		+ -
4	09/26/2025 	NEXT	91.67		+ -
5	10/27/2025 	NEXT	91.67		+ -
6	11/26/2025 	NEXT	91.65		+ -

Return to Bill Entry



Only 5 rows display initially. Use the **View All** link to view all rows in the **Installment Billing Schedule**. The information can be modified as needed. However, the installment amounts must equal the line amount that was entered in the **Gross Extended** field in Step 10. This amount is reflected as the Pretax Invoice Amount.

21.	Click the Installment Billing Schedule 2 tab. 
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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.

Installation Bill Terms
Installation Bill Schedule

Business Unit 50100

Installation Template Invoice MISC000502

Pretax Invoice Amount 550.00 USD

Installation Plan INST-6 Equal Installation Plan-6 mth

Start Date 06/12/2025

Pre-Assign Invoice Numbers

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

Installation Billing Schedule
Installation Billing Schedule 2
Installation 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

Save
Return to Search
Notify

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

22.	<p>Click the Save button.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> <p style="margin: 0;">Return to Bill Entry</p> <div style="display: flex; justify-content: space-around; margin-top: 5px;"> Save Return to Search Notify </div> <p style="margin: 0;">Installation Bill Terms Installation Bill Schedule</p> </div>
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23.	<p>Click the Return to Bill Entry link.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> <p style="margin: 0; border: 2px solid red; padding: 2px;">Return to Bill Entry</p> <div style="display: flex; justify-content: space-around; margin-top: 5px;"> Save Return to Search Notify </div> <p style="margin: 0;">Installation Bill Terms Installation Bill Schedule</p> </div>
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Step	Action
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The **Header – Info 1** tab redisplay.

Header - Info 1 | Line - Info 1

Unit 50100 Invoice MISC000502 Pretax Amt 550.00 USD

Status

*Type

*Customer View Activity

*Invoice Form

Accounting Date

Remit To

Sales

Credit

Billing Specialist

Billing Specialist - Bristol

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 Return to Search Notify Refresh

Add Update/Display

24.	<p>Change the Status field from “NEW” to “RDY”.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>Status <input type="text" value="RDY"/></p> </div>
25.	<p>Click the Save button to save the entries.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p> Save Return to Search Notify Refresh </p> </div>
	<p>Cardinal creates the bill when the system date is equal to or greater than the installment bill generate date.</p>