Entering an Installment Bill 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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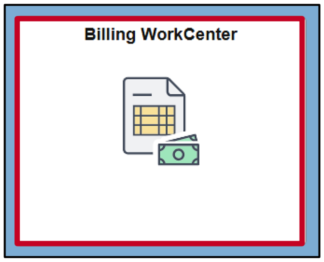
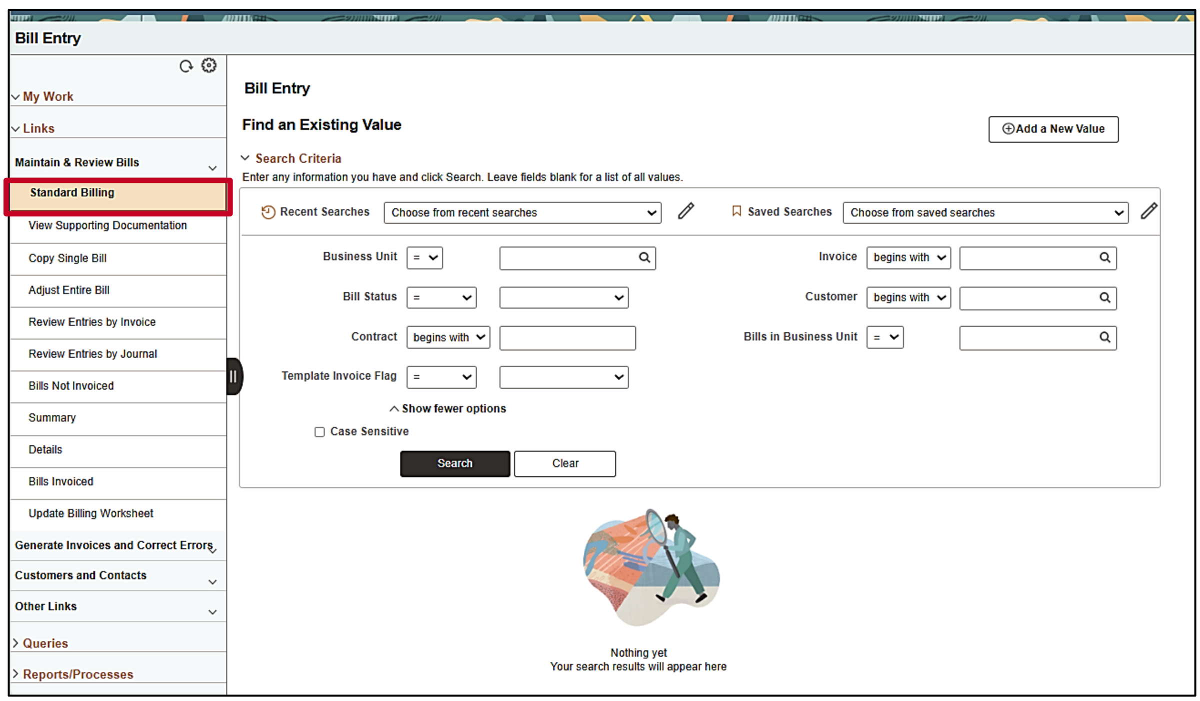
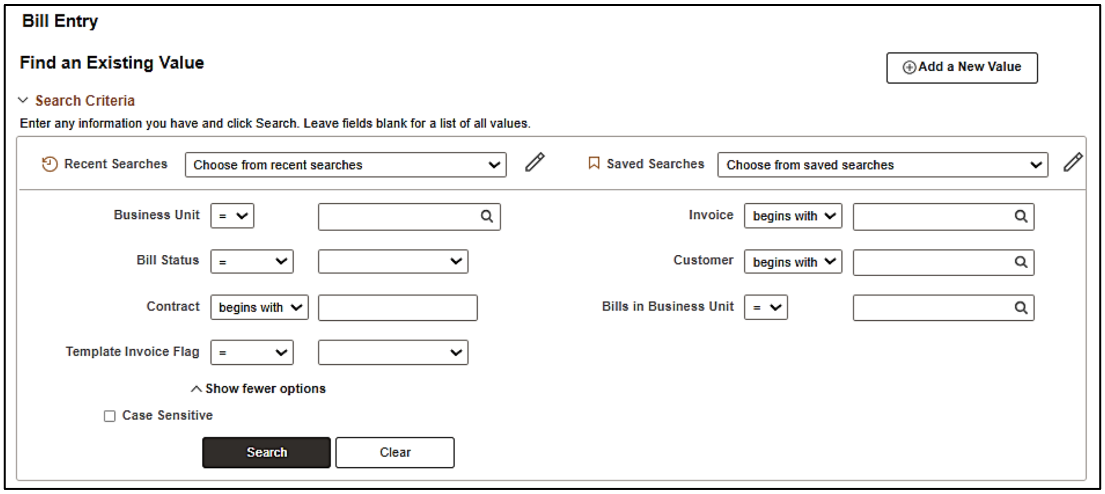
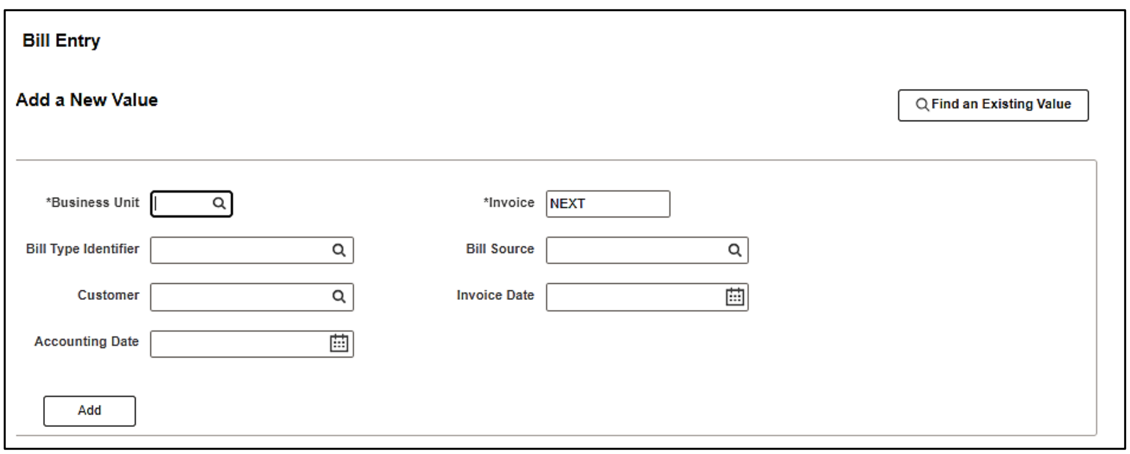
Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal System upgrades.
10/1/2025	Baseline.

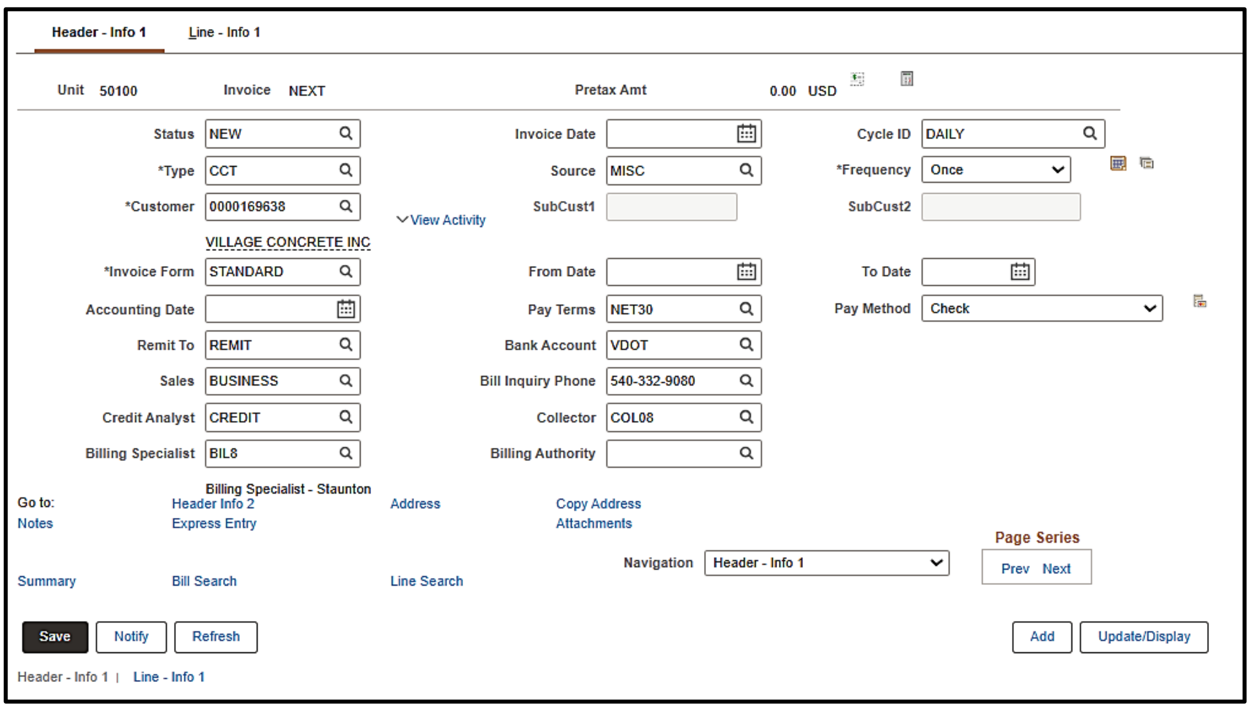
Creating an Installment Bill

Step	Action
1.	Navigate to the **Standard Billing** page by clicking the **Billing WorkCenter** tile. 
ℹ	For more information pertaining to WorkCenters, see the Job Aid titled **Overview of the Cardinal Financials WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**
2.	Use the following navigation path in the WorkCenter: **Links > Maintain and Review Bills > Standard Billing** **Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
ℹ	Users can also access the **Standard Billing** page using the following navigation path: **NavBar** > **Menu** > **Billing** > **Maintain Bills** > **Standard Billing**

Step	Action
	The **Bill Entry Find an Existing Value** page displays. 
3.	Click the **Add a New Value** button. 
	The **Bill Entry Add a New Value** page displays. 
	If the **Business Unit** field does not populate by default, enter or select the applicable Business Unit.
4.	Click the **Bill Type Identifier Look up** icon and select the applicable Bill Type. 

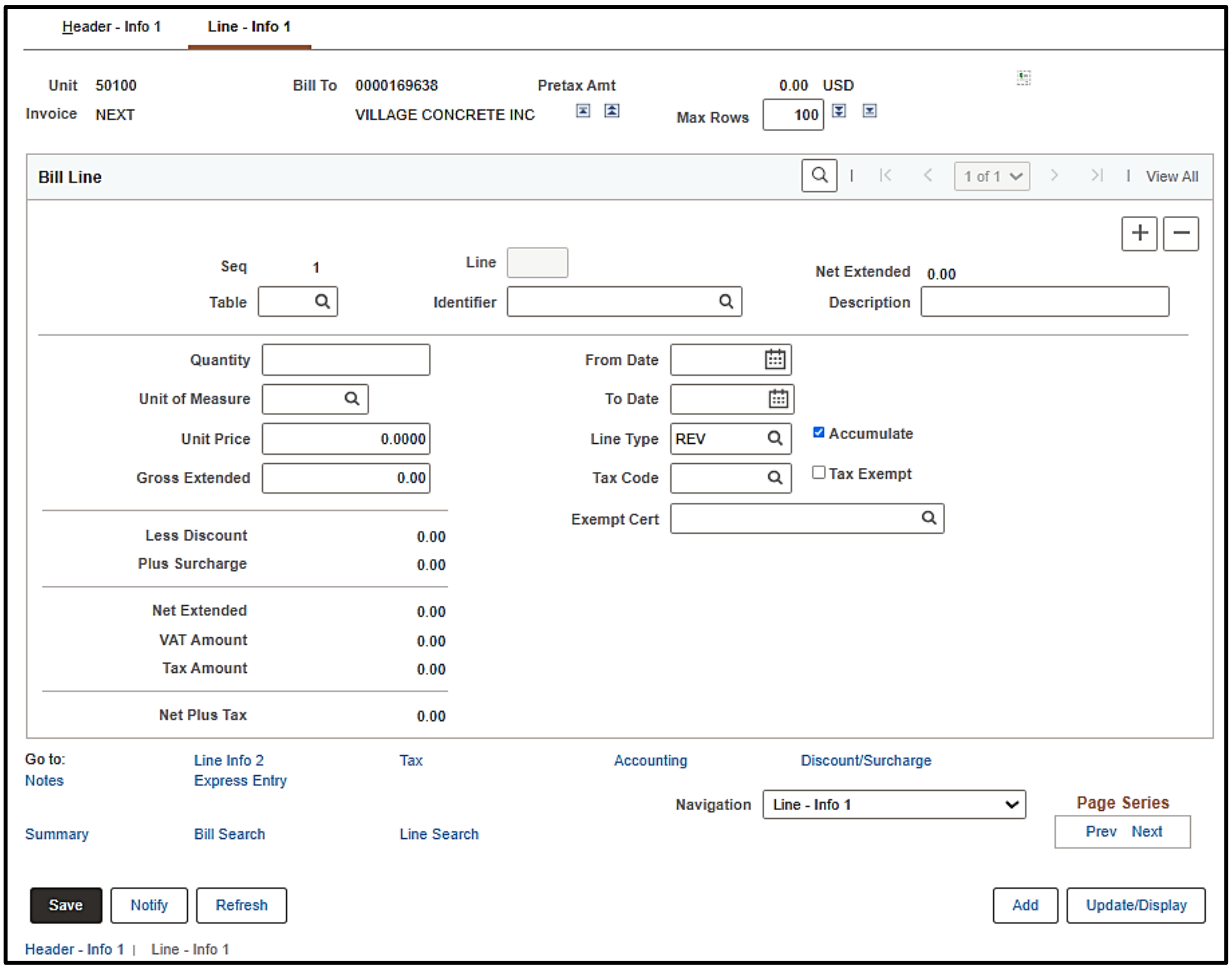
Step	Action
5.	Click the **Bill Source Look up** icon and select the applicable Bill Source. 
6.	Click the **Customer Look up** icon and select the applicable Customer. 
7.	Click the **Add** button. 

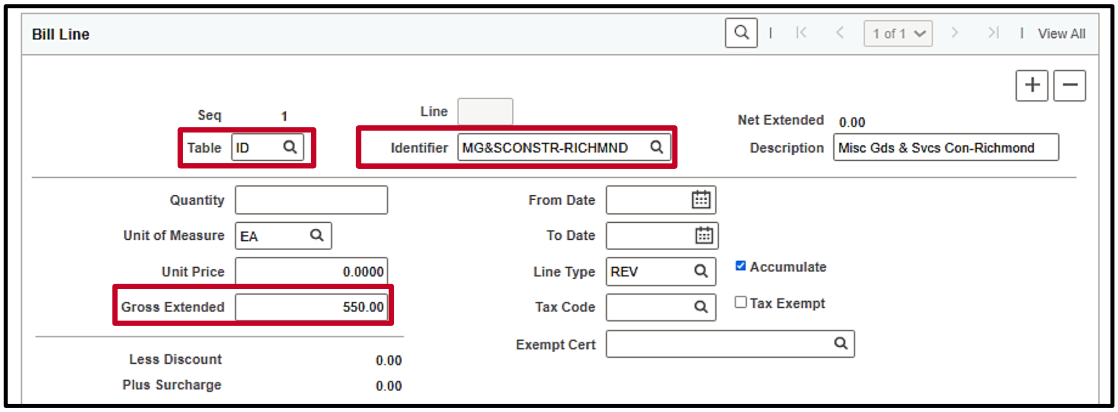
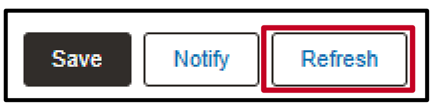
The **Header – Info 1** tab displays.



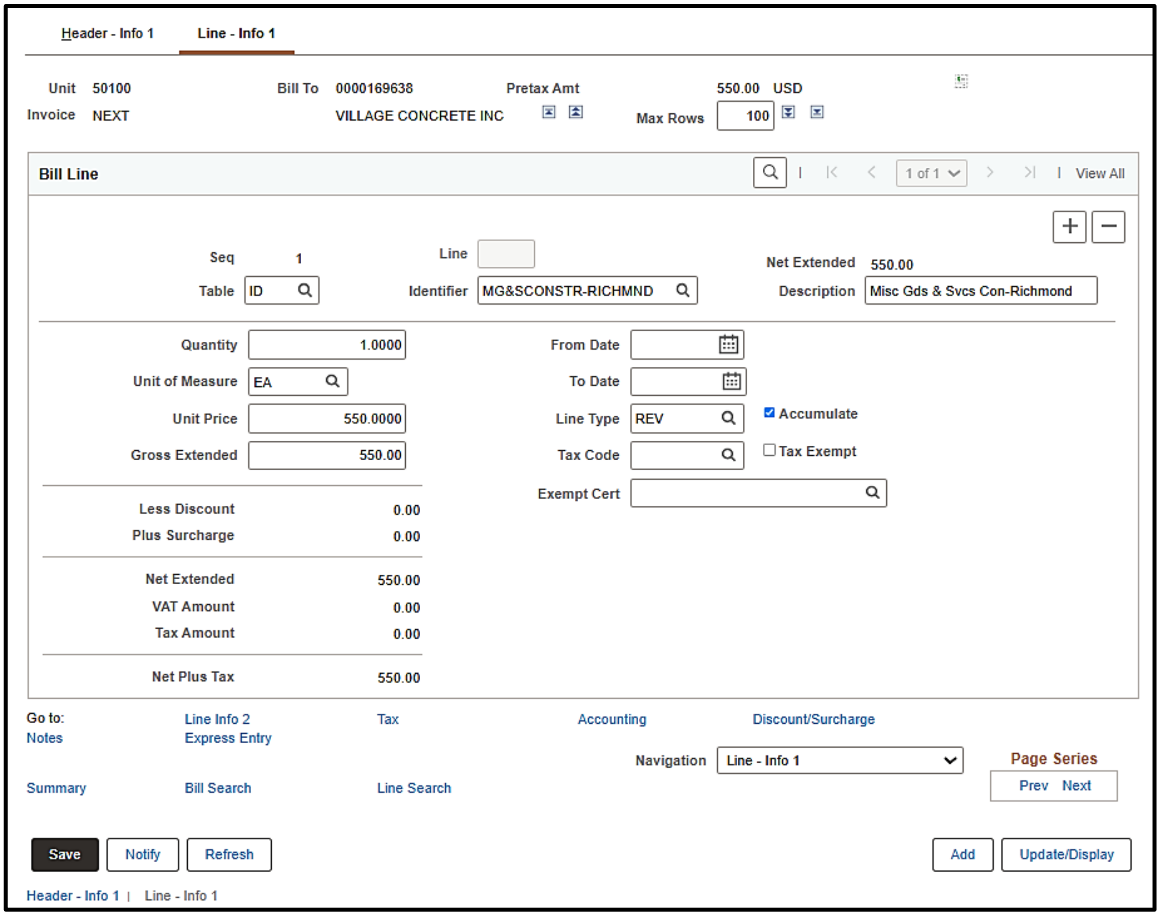
Step	Action
8.	Click the **Cycle ID Look up** icon and select “MTH-INSTAL”. 
9.	Click the **Frequency** dropdown button and select “Installment”. 

Step	Action
10.	Click the **Line – Info 1** tab. 
The **Line – Info 1** tab displays.	



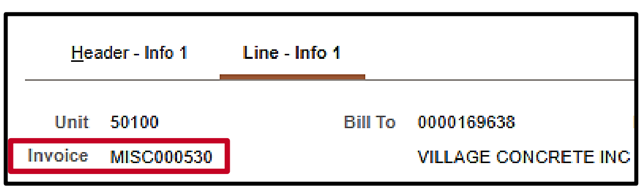
Step	Action
11.	Enter the billing information. At a minimum, enter the following values: • **Table**: determines the type of options available in the **Identifier** field • **Identifier**: used to select the item being billed and the associated charge distribution • **Gross Extended**: total amount of the individual Installment Bills 
12.	Click the **Refresh** button. 

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



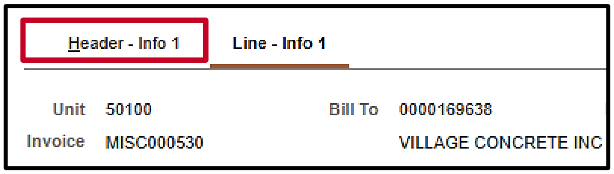
Step	Action
13.	Click the **Save** button.

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



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>14.</td><td>

Click the **Header – Info 1** tab.



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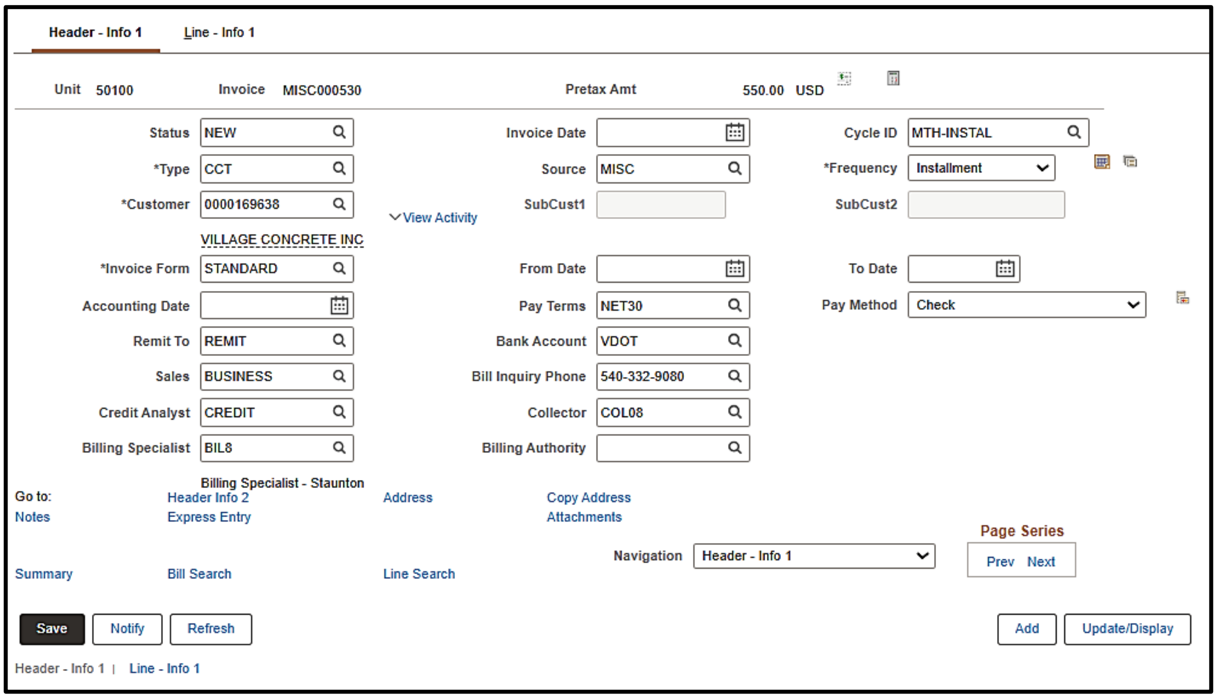
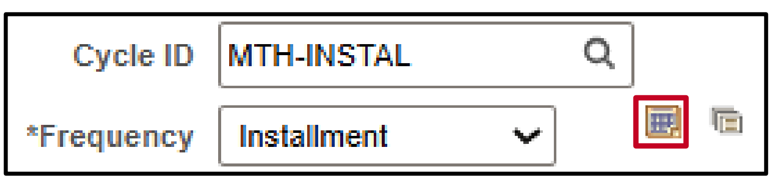
The **Header – Info 1** tab displays.



</td></tr>
<tr><td>15.</td><td>

Click the **Go To Installment Bill Schedule** icon.



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<table>
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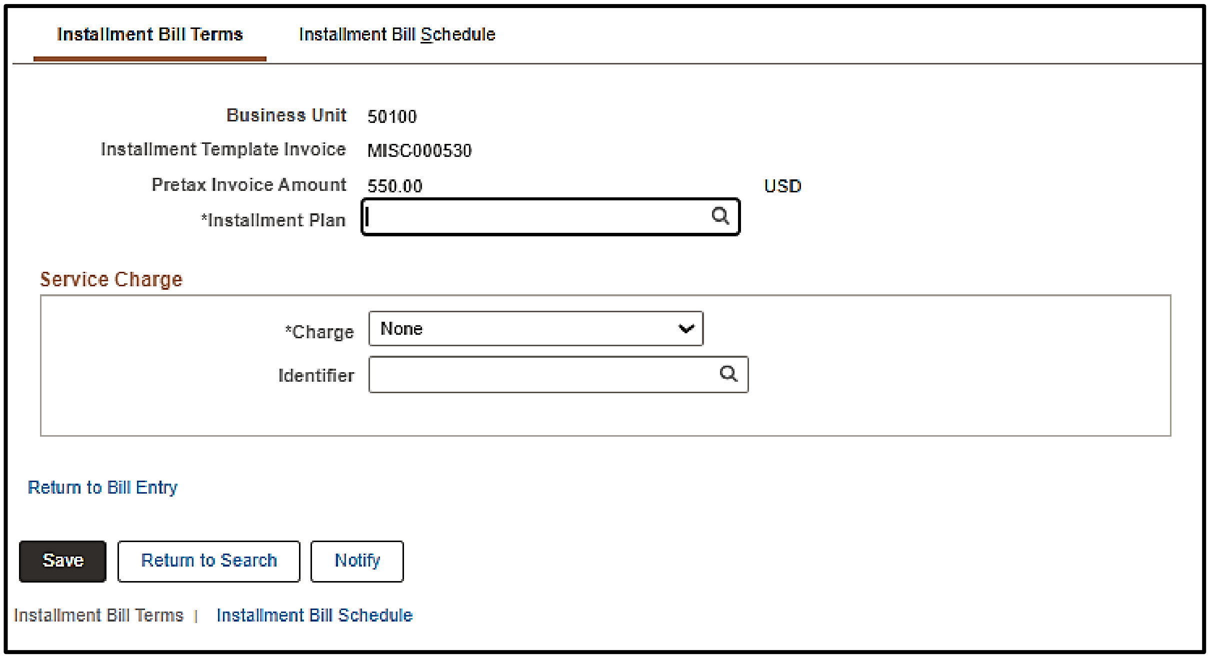
The **Installment Bill Terms** tab displays.



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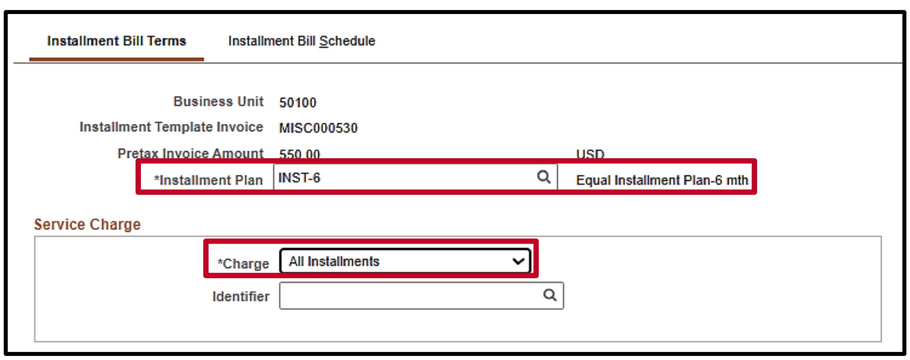
<tr><td>16.</td><td>

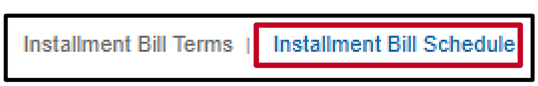
Enter the Installment Bill terms. At a minimum, enter values for the following fields:

- **Installment Plan**
- **Charge**



</td></tr>
<tr><td>17.</td><td>

Click the **Installment Bill Schedule** tab.



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<tr><th>Step</th><th>Action</th></tr>
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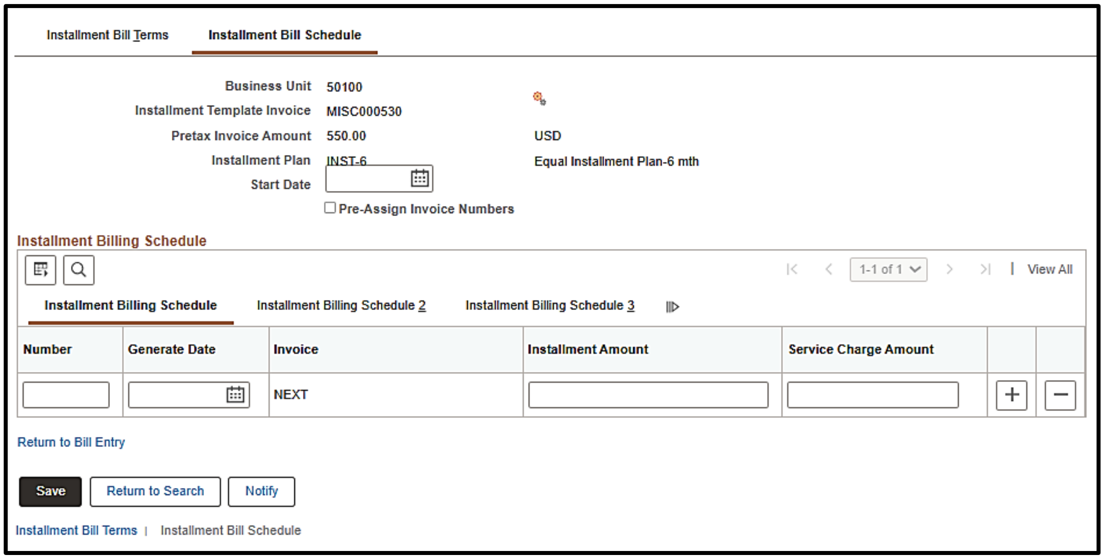
The **Installment Bill Schedule** tab displays.



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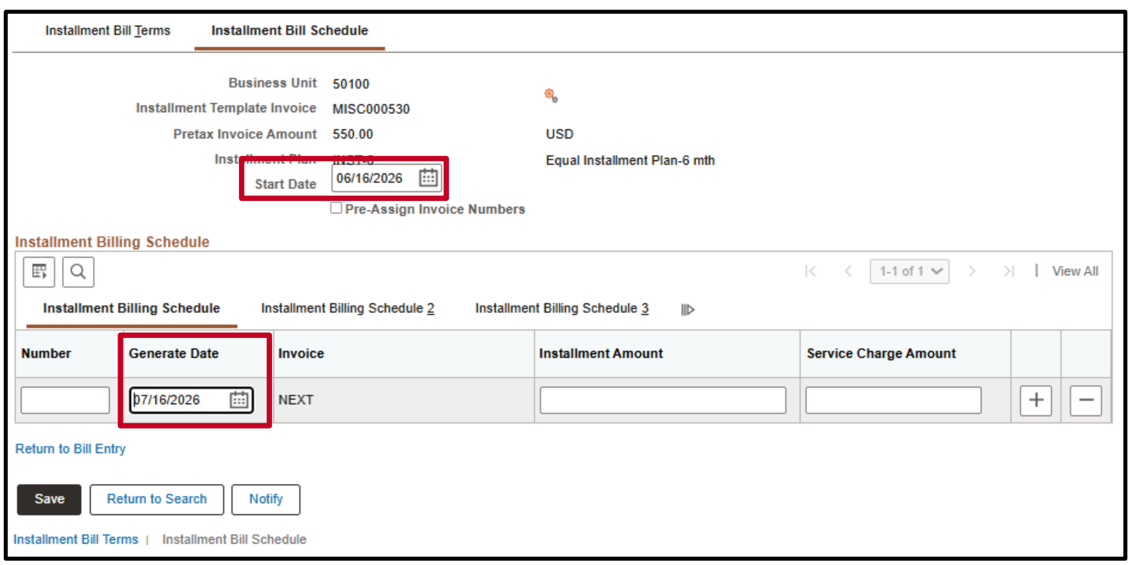
<tr><td>18.</td><td>

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

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



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<tr><td>19.</td><td>

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

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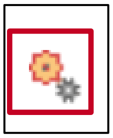
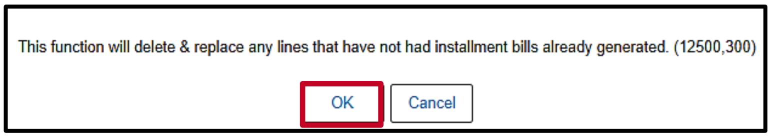
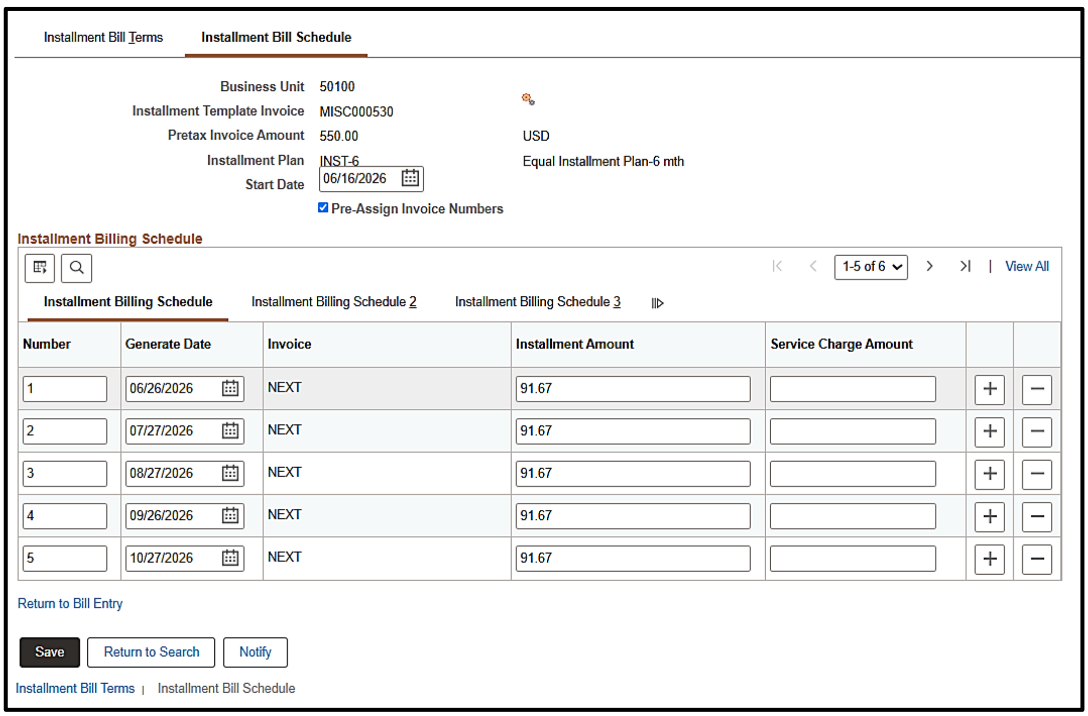
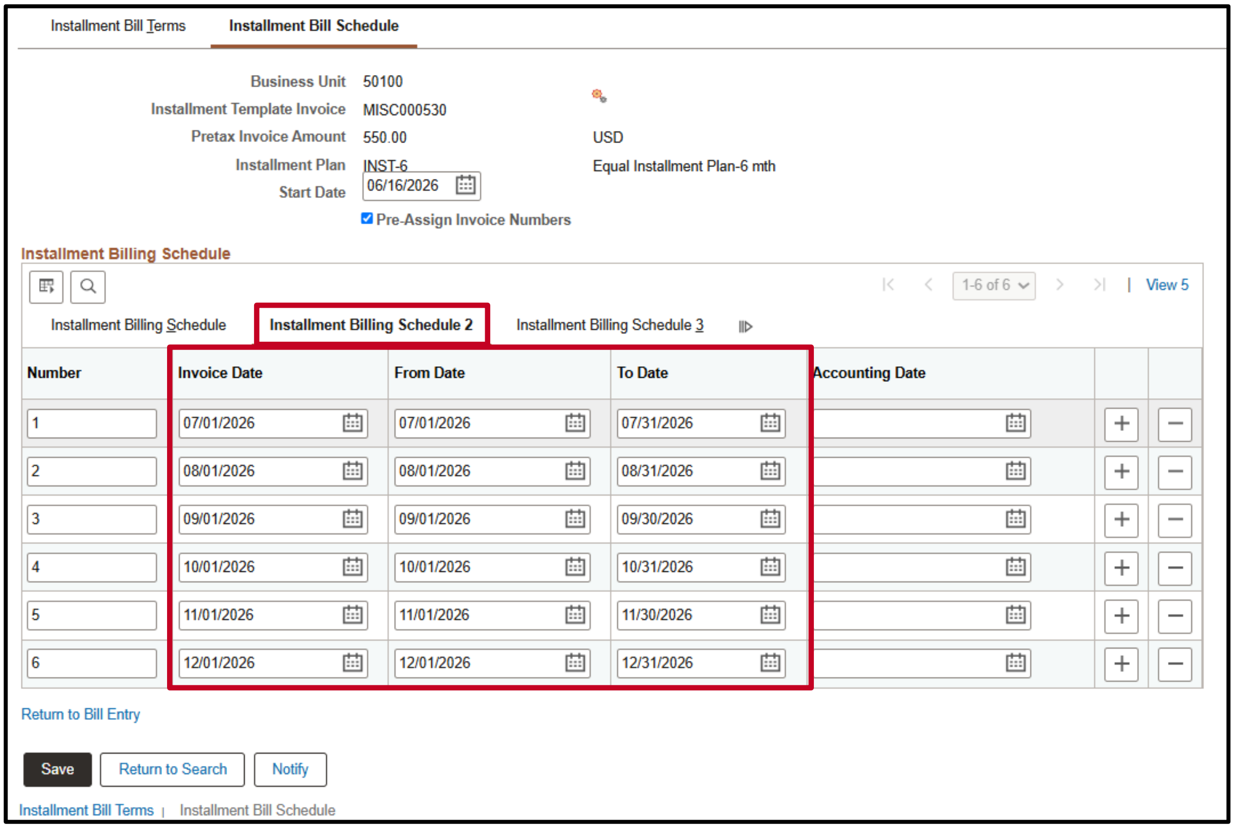
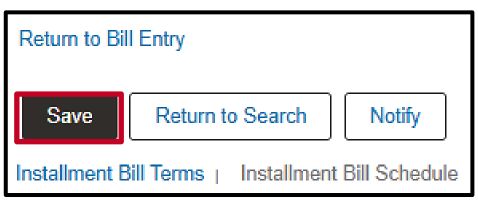
Step	Action
20.	Click the **Generate Install Bill Schedule** icon. 
21.	Click the **OK** button if a warning message displays. 
	The page refreshes with the **Installment Billing Schedule** rows created. The **Generate Date** and **Installment Amount** fields automatically populate based on previous data entered. 
	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.
22.	Click the **Installment Billing Schedule 2** tab. 

Step	Action

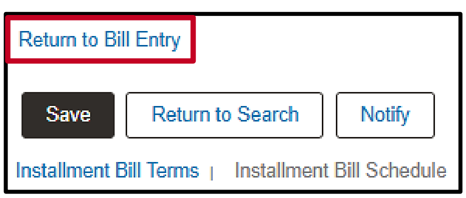
The **Installment Billing Schedule 2** tab displays the **Invoice Date**, **From Date**, and **To Date** fields for each installment.



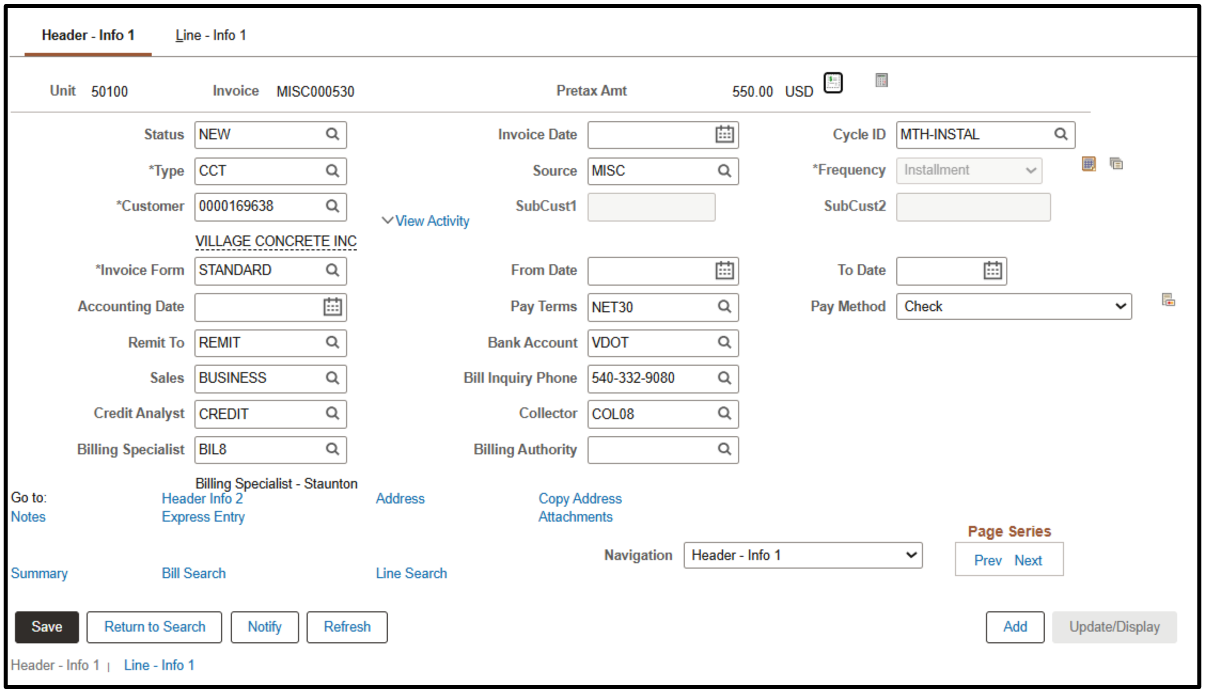
23. Click the **Save** button.



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



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The **Header – Info 1** tab displays.


</td></tr>
<tr><td>25.</td><td>Click the **Status Look up** icon and select “RDY”.


</td></tr>
<tr><td>26.</td><td>Click the **Save** button to save the entries.


</td></tr>
<tr><td></td><td>Cardinal creates the Bill when the system date is equal to or greater than the Installment Bill generate date.</td></tr>
</table>