



Accounts Receivable Job Aid

AR323 Entering an Installment Bill (VDOT Only)

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.

Table of Contents

Revision History	2
Creating an Installment Bill	3



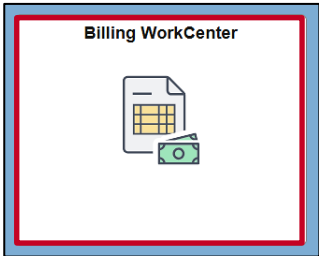
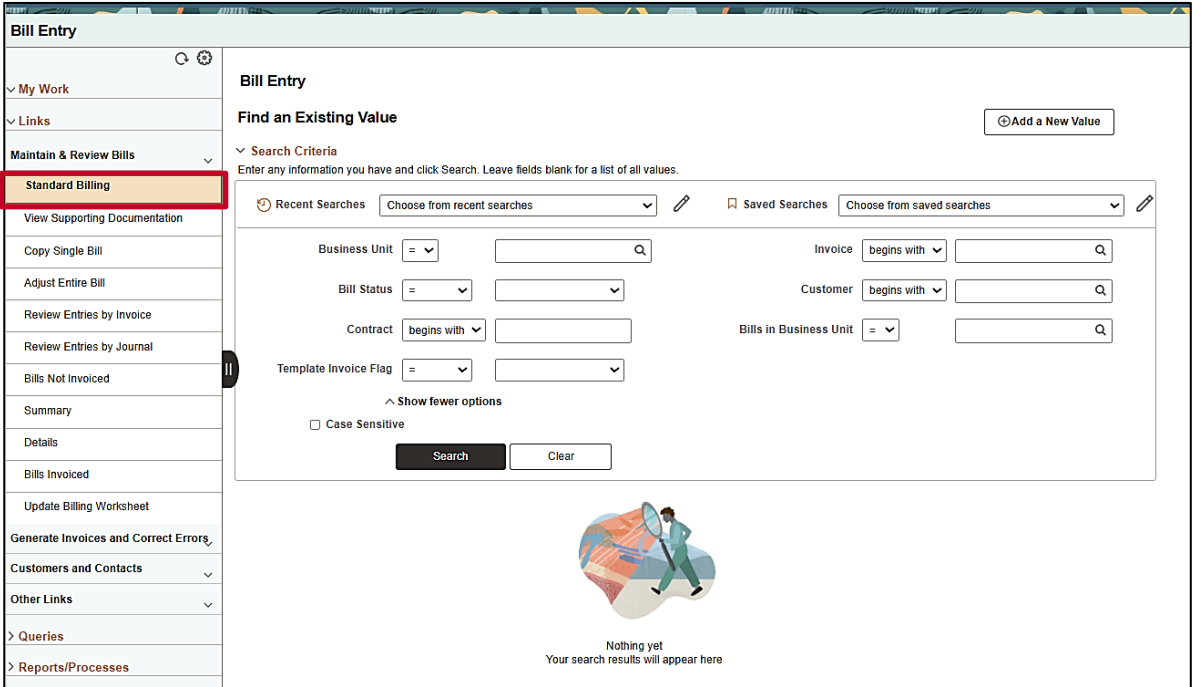
Accounts Receivable Job Aid

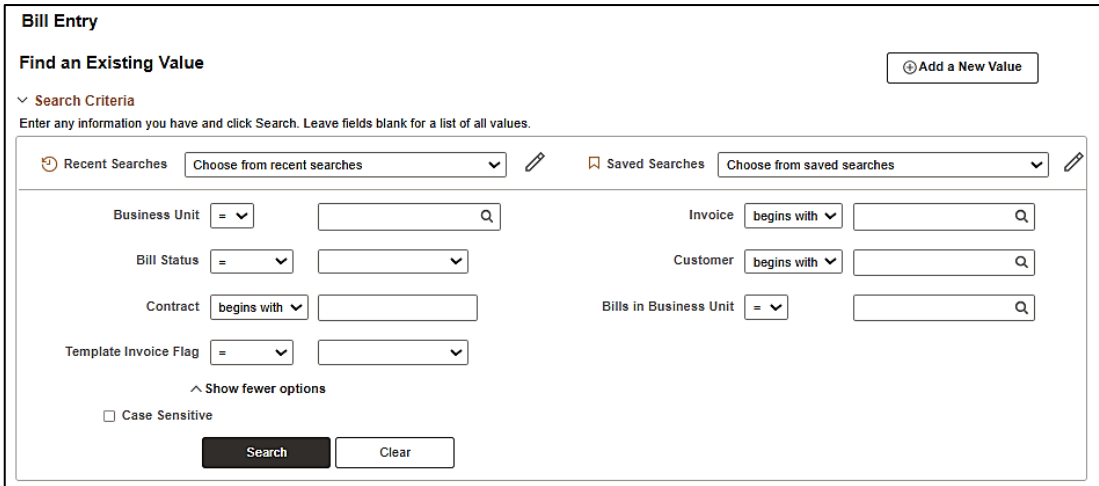
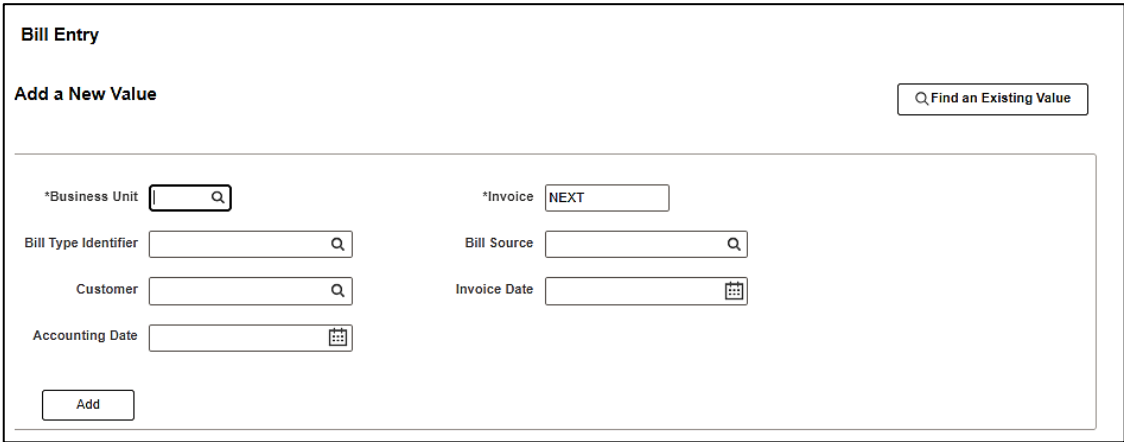
AR323 Entering an Installment Bill (VDOT Only)

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

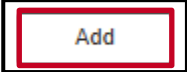
Step	Action
1.	Navigate to the Standard Billing page by clicking the Billing WorkCenter tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning
2.	Use the following navigation 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. 
	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. 

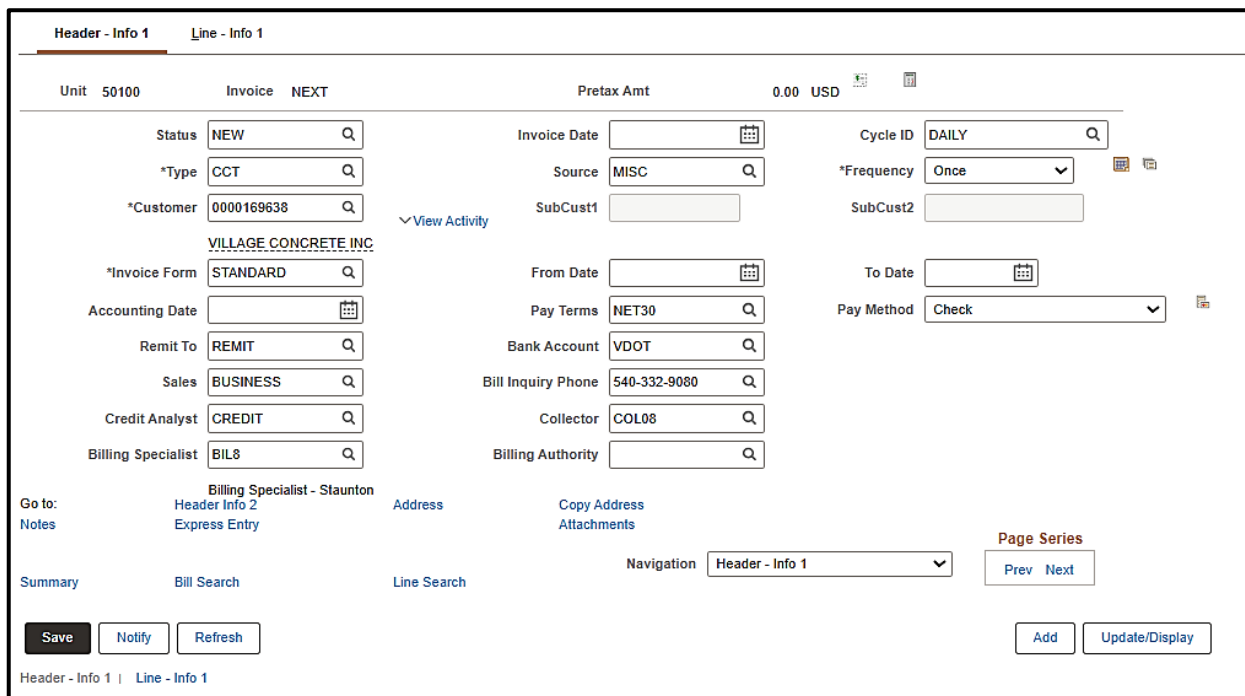


Accounts Receivable Job Aid

AR323 Entering an Installment Bill (VDOT Only)

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.

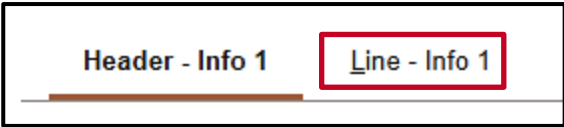


8.	Click the Cycle ID Look up icon and select “MTH-INSTAL”. 
9.	Click the Frequency dropdown button and select “Installment”. 

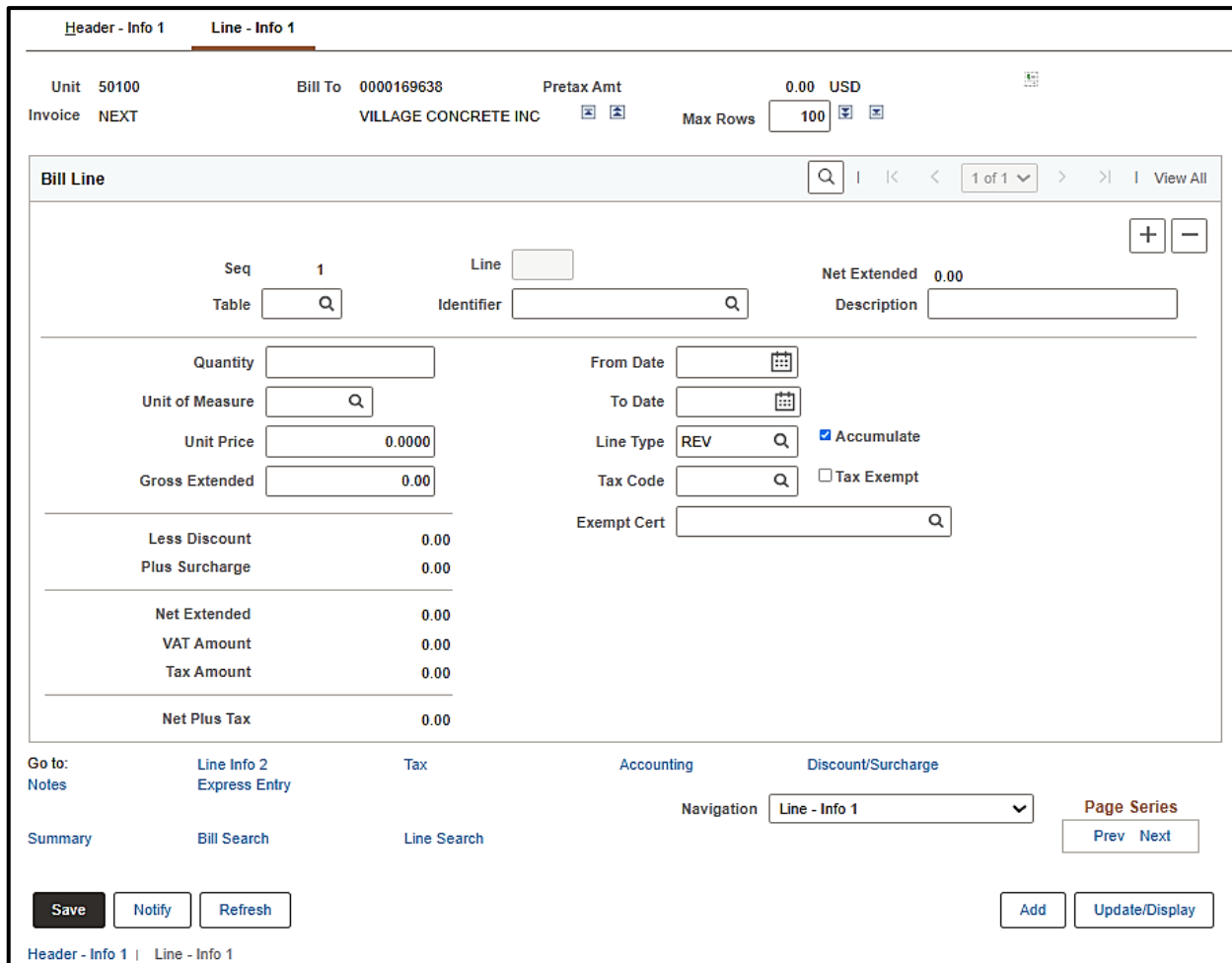


Accounts Receivable Job Aid

AR323 Entering an Installment Bill (VDOT Only)

Step	Action
10.	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 1 of 1 View All

Seq 1 Line Net Extended 0.00
Table Identifier Description

Quantity From Date To Date
Unit of Measure Line Type REV ☒ Accumulate
Unit Price 0.0000 Tax Code ☐ Tax Exempt
Gross Extended 0.00 Exempt Cert

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

Go to: Notes Line Info 2 Tax Accounting Discount/Surcharge
Summary Bill Search Line Search Navigation Line - Info 1 Page Series Prev Next

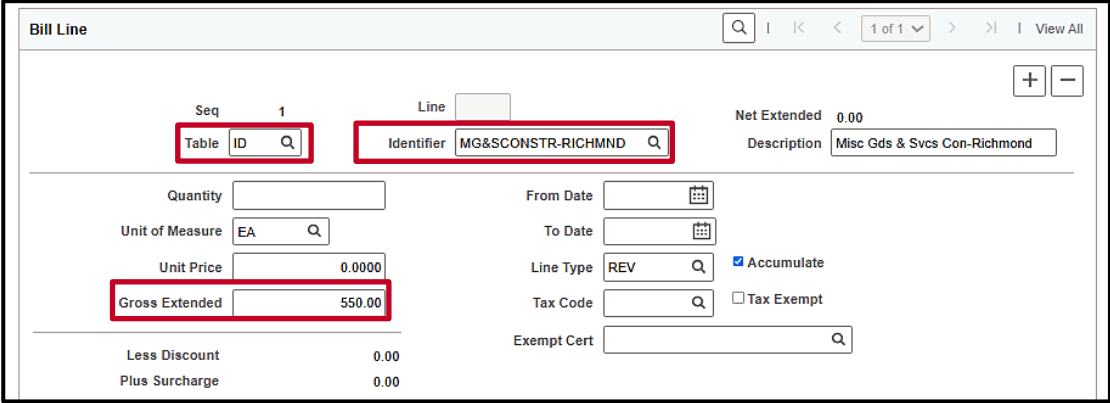
Save Notify Refresh Add Update/Display

Header - Info 1 | Line - Info 1



Accounts Receivable Job Aid

AR323 Entering an Installment Bill (VDOT Only)

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  The screenshot shows the 'Bill Line' form. The 'Table' dropdown is set to 'ID'. The 'Identifier' dropdown is set to 'MG&SCONSTR-RICHMND'. The 'Gross Extended' field is set to '550.00'. Other fields include 'Seq' (1), 'Line' (empty), 'Net Extended' (0.00), 'Description' (Misc Gds & Svcs Con-Richmond), 'Quantity' (empty), 'Unit of Measure' (EA), 'Unit Price' (0.0000), 'From Date' (empty), 'To Date' (empty), 'Line Type' (REV), 'Tax Code' (empty), 'Exempt Cert' (empty), 'Less Discount' (0.00), and 'Plus Surcharge' (0.00). The 'Accumulate' checkbox is checked.
12.	Click the Refresh button.  The screenshot shows three buttons: 'Save', 'Notify', and 'Refresh'. The 'Refresh' button is highlighted with a red box.



Accounts Receivable Job Aid

AR323 Entering an Installment Bill (VDOT Only)

Step	Action
	The Line – Info 1 tab refreshes displaying additional values based on the previous entries. Header - Info 1 Line - Info 1 Unit 50100 Bill To 0000169638 Pretax Amt 550.00 USD Invoice NEXT VILLAGE CONCRETE INC Max Rows 100 Bill Line 1 of 1 View All 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 Gross Extended 550.00 Accumulate 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: Notes Line Info 2 Express Entry Tax Accounting Discount/Surcharge Navigation Line - Info 1 Page Series Summary Bill Search Line Search Prev Next Save Notify Refresh Add Update/Display Header - Info 1 Line - Info 1



Accounts Receivable Job Aid

AR323 Entering an Installment Bill (VDOT Only)

Step	Action
14.	Click the Header – Info 1 tab. Header - Info 1 Line - Info 1 Unit 50100 Bill To 0000169638 Invoice MISC000530 VILLAGE CONCRETE INC

The **Header – Info 1** tab displays.

Header - Info 1

Line - Info 1

Unit 50100 Invoice MISC000530 Pretax Amt 550.00 USD

Status NEW

*Type CCT

*Customer 0000169638

VILLAGE CONCRETE INC

*Invoice Form STANDARD

Accounting Date

Remit To REMIT

Sales BUSINESS

Credit Analyst CREDIT

Billing Specialist BIL8

View Activity

Invoice Date

Source MISC

SubCust1

From Date

Pay Terms NET30

Bank Account VDOT

Bill Inquiry Phone 540-332-9080

Collector COL08

Billing Authority

Cycle ID MTH-INSTAL

*Frequency Installment

SubCust2

To Date

Pay Method Check

Go to: Notes

Header Info 2 Express Entry

Address

Copy Address Attachments

Page Series

Prev

Next

Summary

Bill Search

Line Search

Navigation Header - Info 1

Save

Notify

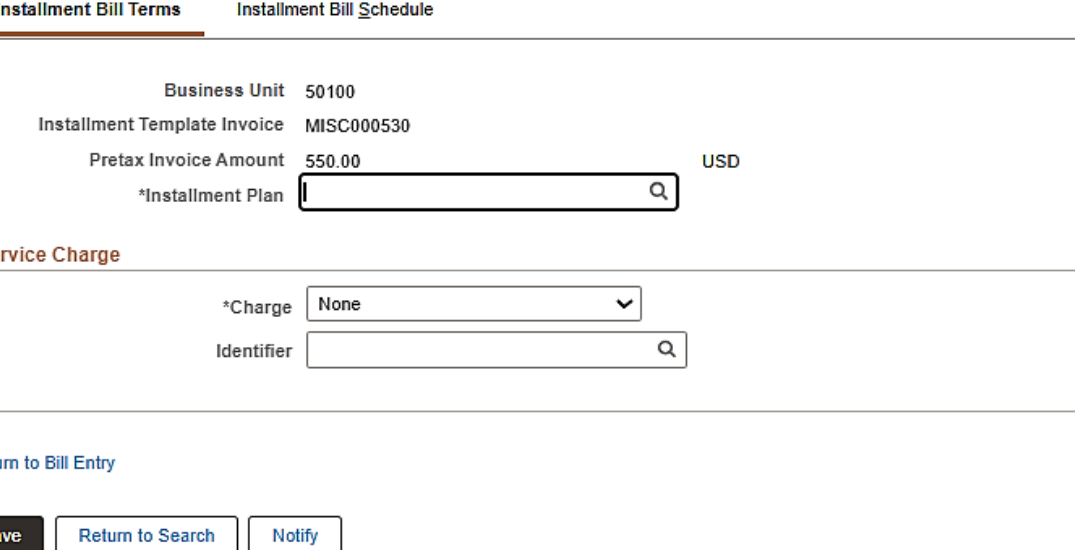
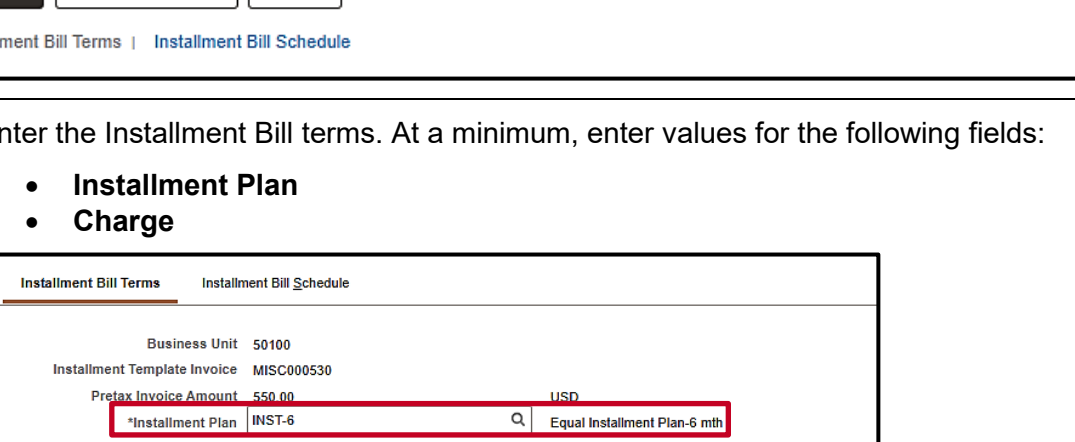
Refresh

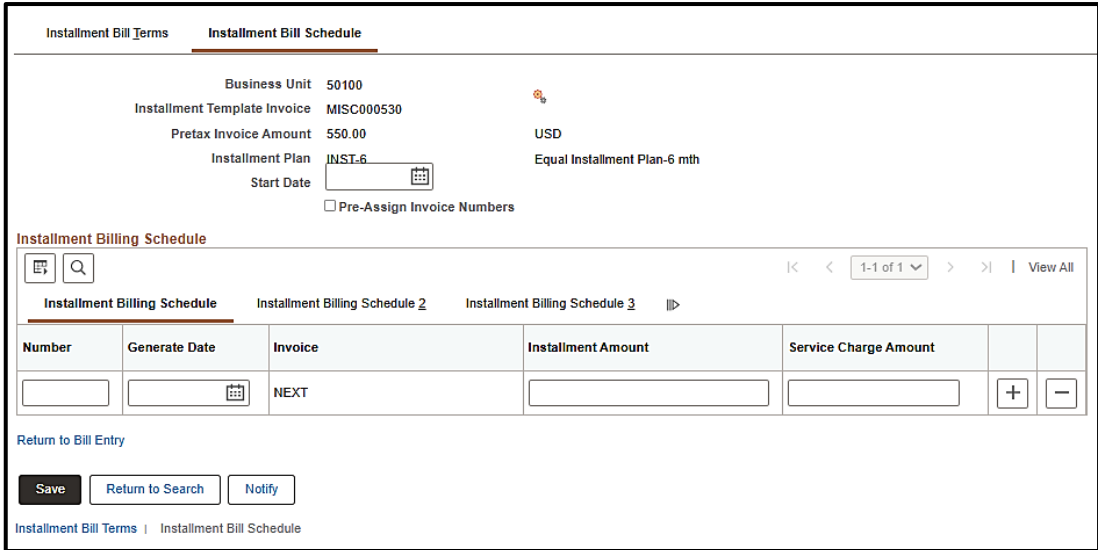
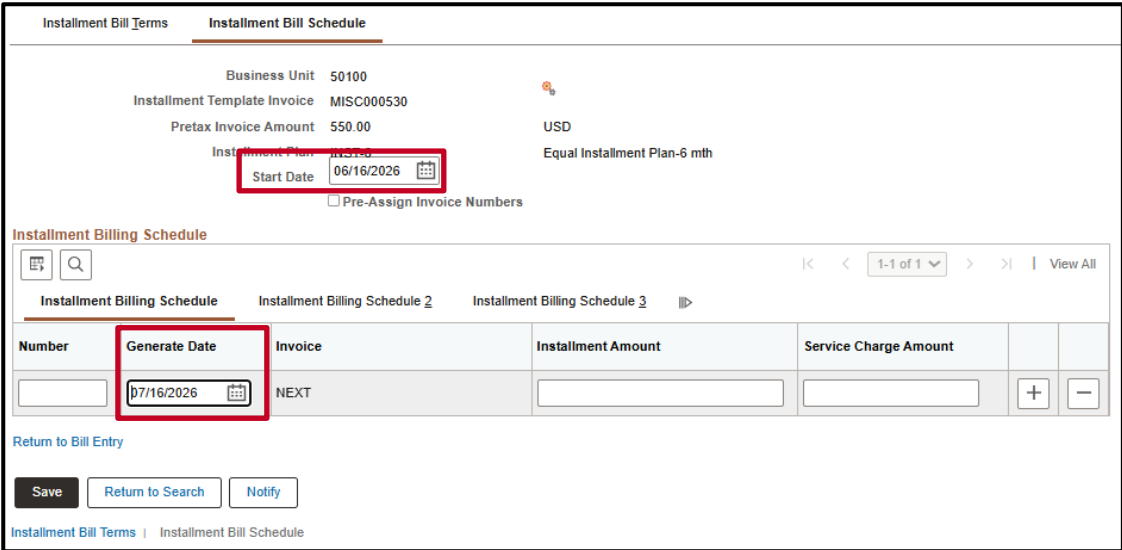
Add

Update/Display

Header - Info 1 | Line - Info 1

15.	Click the Go To Installment Bill Schedule icon. Cycle ID MTH-INSTAL *Frequency Installment
-----	---

Step	Action
	The Installment Bill Terms tab displays. 
16.	Enter the Installment Bill terms. At a minimum, enter values for the following fields: • Installment Plan • Charge 
17.	Click the Installment Bill Schedule tab. 

Step	Action
	The Installment Bill Schedule tab displays. 
18.	Enter the billing schedule information in the Installment Bill Schedule section. At a minimum, enter values for the following fields: • Start Date • Generate Date 
19.	Click the Pre-Assign Invoice Numbers checkbox option. 

Step	Action
20.	Click the Generate Install Bill Schedule icon. 
21.	Click the OK button if a warning message displays. This function will delete & replace any lines that have not had installment bills already generated. (12500,300) OK Cancel

The page refreshes with the **Installment Billing Schedule** rows created. The **Generate Date** and **Installment Amount** fields automatically populate based on previous data entered.

Installment Bill Terms
Installment Bill Schedule

Business Unit 50100

Installment Template Invoice MISC000530

Pretax Invoice Amount 550.00

Installment Plan INST-6

Start Date 06/16/2026

USD

Equal Installment Plan-6 mth

☒ Pre-Assign Invoice Numbers

Installment Billing Schedule

< 1-5 of 6 > >> | [View All](#)

Installment Billing Schedule
Installment Billing Schedule 2
Installment Billing Schedule 3
▶▶

Number	Generate Date	Invoice	Installment Amount	Service Charge Amount		
1	06/26/2026	NEXT	91.67		+	-
2	07/27/2026	NEXT	91.67		+	-
3	08/27/2026	NEXT	91.67		+	-
4	09/26/2026	NEXT	91.67		+	-
5	10/27/2026	NEXT	91.67		+	-

[Return to Bill Entry](#)

Save
Return to Search
Notify

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

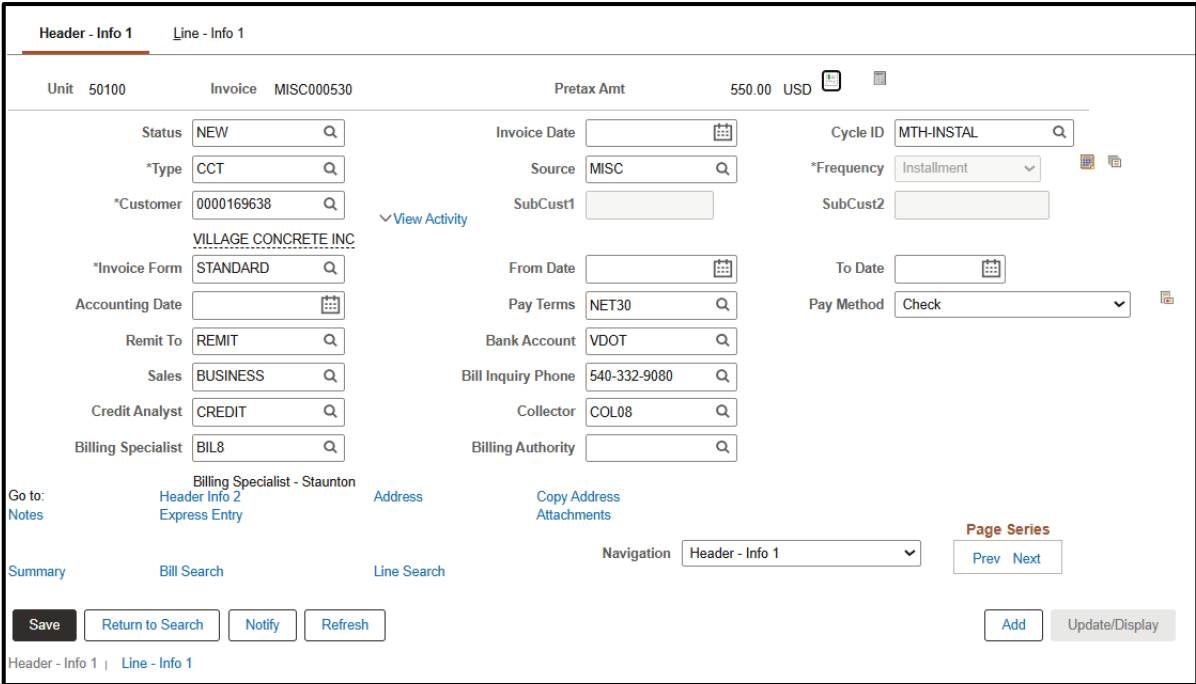
	Only 5 rows display initially. Click the View All link to view all rows in the Installment Billing Schedule section. The information can be modified as needed. However, the installment amounts must equal the Line amount entered in the Gross Extended field in Step 10. This amount is reflected as the pretax Invoice amount.
22.	Click the Installment Billing Schedule 2 tab. Installment Billing Schedule Installment Billing Schedule 2 Installment Billing Schedule 3 ▶▶

Page 13 of 14



Accounts Receivable Job Aid

AR323 Entering an Installment Bill (VDOT Only)

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