

How to Setup Invoice Cycle in Card Accounts

1. From **Card Fueling** module, click **Card Accounts**. The **Card Accounts** screen will be displayed.
Select a **CF Customer** where you want to setup **Invoice Cycle**. Click **Open Selected** toolbar button to open **Card Account** details.

Search Accounts

Close

Accounts Vehicle Cards Account Network X-Ray

Clear Filters New Export Columns View Export Account Import Card Export Card Credit Lockout 1 record (1 selected)

Accounts Name	Company	Address	City	State	Zip Code	Customer Active	Discount Schedule	Invoice Cycle	Local Price P
Account Number	Account Name	Phone	2414 HAZ Ave Vancouver, WA	Vancouver	WA	98665	✓	Monthly Volume Discounts	BIW

2. Click Invoice Format tab, **Invoice Cycle** field (drop down) will be located.

Click on the drop down symbol to display all available **Invoice Cycle**. Records will be coming from Card Fueling > Setup > Invoice Cycle.

Account - [New Invoice](#) | [Invoice Cycle](#) | [Price Rule Group](#) | [Customer](#) | [Close](#)

Details | **Invoice Format** | Quote | Cards | Vehicles | Driver Pin | Departments | Miscellaneous | Purchase Orders | Audit Log

Invoice Cycle *

Primary Sort Order	Invoice Cycle	Description
Secondary Sort Order	* Test	Sample
Detail Display	SampleCycle	Daily
Print Price Per Gallon	* TM	Tri Monthly
Print Site Address	* SW	Semi-weekly
Department Grouping	S	Semi-Monthly
Primary Department	BM	Bi-Monthly

Summary By Product ☐ Summary By Department ☐

Summary By Card ☐ Summary By Dept/Card/Product ☐

Summary By Card/Product ☐ Summary By Dept/Vehicle/Product ☐

Summary By Vehicle: ☐ Summary By Dept/DriverPin/Product ☐

Summary By Miscellaneous ☐ Summary By Dept/Product ☐

Summary By Driver Pin ☐ Print Time on the Invoice ☐ Reports ☐

Show Vehicle Description Only ☐ Print Miscellaneous Info on Invoice ☐

Show Driver Pin Description Only ☐ Page Break By Primary Sort Order ☐

Export File Mapping

3. Select an **Invoice Cycle** then click **Save** toolbar button.
Then click the **Close** toolbar button or **X** button.