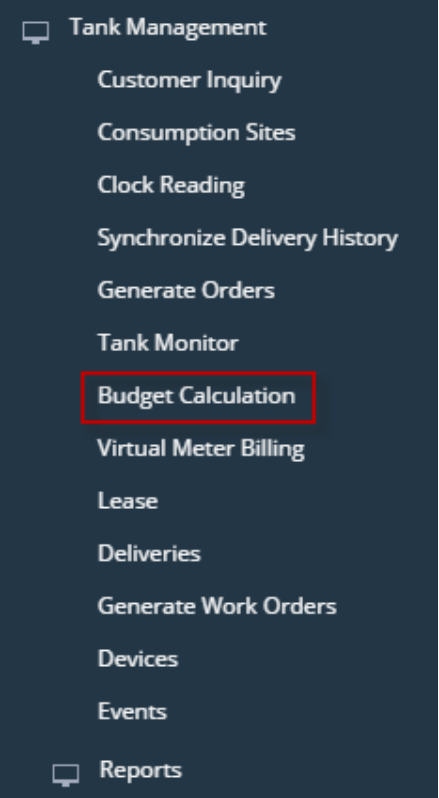
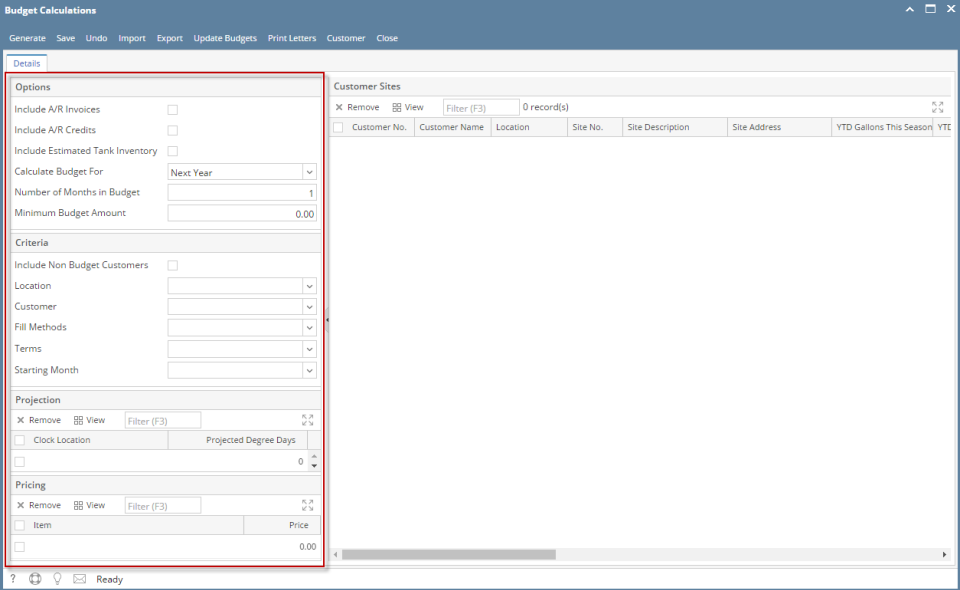


# How to Generate Customer Budgets

1. On the Menu panel, click **Budget Calculation**. This will open the Budget Calculation screen.



2. Select and filter the records based on the Options, Criteria, Projection and Pricing set from the Details tab.



Details

Options

Include A/R Invoices

☐

Include A/R Credits

☐

Include Estimated Tank Inventory

☐

Calculate Budget For

Next Year

▼

Number of Months in Budget

1

Minimum Budget Amount

300.00

Criteria

Include Non Budget Customers

☒

Location

0001 - Fort Wayne

▼

Customer

0001005056

▼

Fill Methods

Keep Full × Will Call ×

▼

Terms

Net 30 ×

▼

Starting Month

▼

Projection

× Remove

View

Filter (F3)

↕↕

<input type="checkbox"/> Clock Location	Projected Degree Days
<input checked="" type="checkbox"/> 001	300

Pricing

× Remove

View

Filter (F3)

↕↕

<input type="checkbox"/> Item	Price
<input checked="" type="checkbox"/> LPG	1.60

a. Options:

- i. Include A/R Invoices is optional - see below on impact to Estimate Budget Calculation
- ii. Include A/R Credits is optional - see below on impact to Estimate Budget Calculation
- iii. Include Estimated Tank Inventory is optional - see below on impact to Estimate Budget Calculation
  1. Answer Yes if you want summer fills remaining inventory to be reduced from the budget amount
- iv. Calculate Budget For
  1. Next Year = Full year projection and Budget Calculation
  2. This Year = Revised Budget amount based on remaining budget season and YTD history
- v. Number of Months in Budget
  1. Enter amount of Months to use for Monthly Budget Amount based on Full Year or Partial year projection
- vi. Minimum Budget Amount
  1. This will be used in place of the actual budget amount if the budget calculation is lower than the minimum.
- vii. IE Budget Calculation = 50, but minimum is 100, then 100 would be used instead of 50.

b. Criteria:

- i. Include Non Budget Customers
  1. Set to No to only calculate budgets for existing budget customers

2. Set to Yes to calculate a new budget for a customer that was not previously on budget
    - a. This is normally would be done for a single customer at a time and use the Customer Filter
    - ii. Location - used to filter results if managing/verifying budgets by location
    - iii. Customer - used to filter results, typically when doing a single customer that is new to Budgets
    - iv. Fill Methods - optional used to filter results
    - v. Terms - optional used to filter results
    - vi. Starting Month- optional used to filter results
  - c. **Projection:**
    - i. **Clock Location and Projected Degree Days is Required**
  - d. **Pricing:**
    - i. **Item # and Price is Required**
3. Click the **Generate toolbar button**. This will display the customer's site on the grid.

Customer No.	Customer Name	Location	Site No.	Site Description	Site Address	HTG Station This Season	HTG Station Last Season	HTG Station 2 Season Ago	Burn Rate	Heating Usage	Non-Heat Usage	Estimated Qty in Tank	Required Qty	Price	Invoiced	Credits	Wkg Qty	Remaining Budget
00000000	Customer C	0001 Non-Res	0001	Test Site C	1234 Main Street	175	0	0	4.0	80.000007	10.01	\$4.000007	220.00007	1.0	0.00	0.00	0.00	350.00

The following values generated from Budget Calculations are being calculated as follows:

- **Heat Usage** = Projected Degree Days / Burn Rate
- **Non-Heating Usage** = 365 \* Daily Use - (If Calculating for Next Year)  
= Daily Use \* 30 \* # of Months (If calculating for This Year)
- **Required Qty** = Non-Heat Usage + Heat-Usage – Estimated Tank Inventory (If Include Estimated Tank Inventory is checked)  
= Non-Heat Usage + Heat-Usage (If Include Estimated Tank Inventory is unchecked)
- **Estimated Budgets** - computation is based on the selected options. See link below.

a. **A/R Invoices and A/R Credits = unchecked**

Estimated Budgets = (Required Qty \* Price) / No. of Months in Budget

b. **A/R Invoices = checked, A/R Credits = unchecked**

Estimated Budgets = (Required Qty \* Price + Current AR Balance) / No. of Months in Budget

c. **A/R Invoices = unchecked, A/R Credits = checked**

Estimated Budgets = (Required Qty \* Price + Unapplied Credits) / No. of Months in Budget

d. **A/R Invoices and A/R Credits = checked**

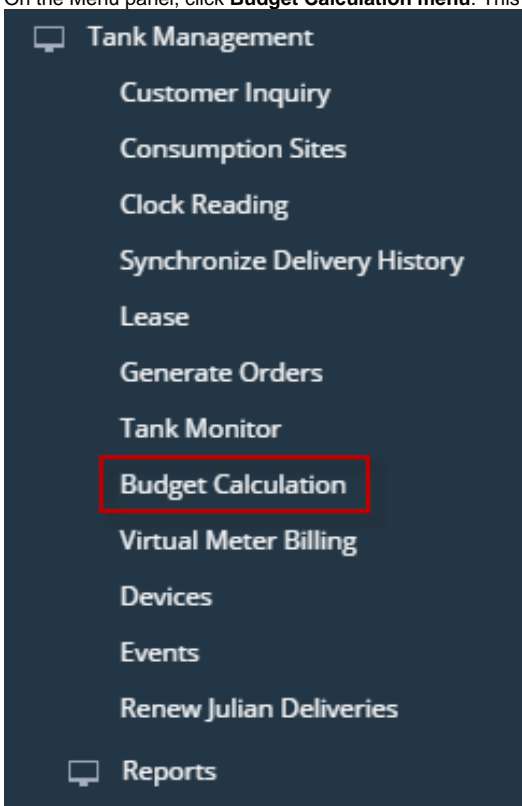
Estimated Budgets = (Required Qty \* Price + Current AR Balance + Unapplied Credits) / No. of Months in Budget

**NOTE:** Minimum Budget Amount will be used instead, if the value is larger than the Estimated Budget calculation.

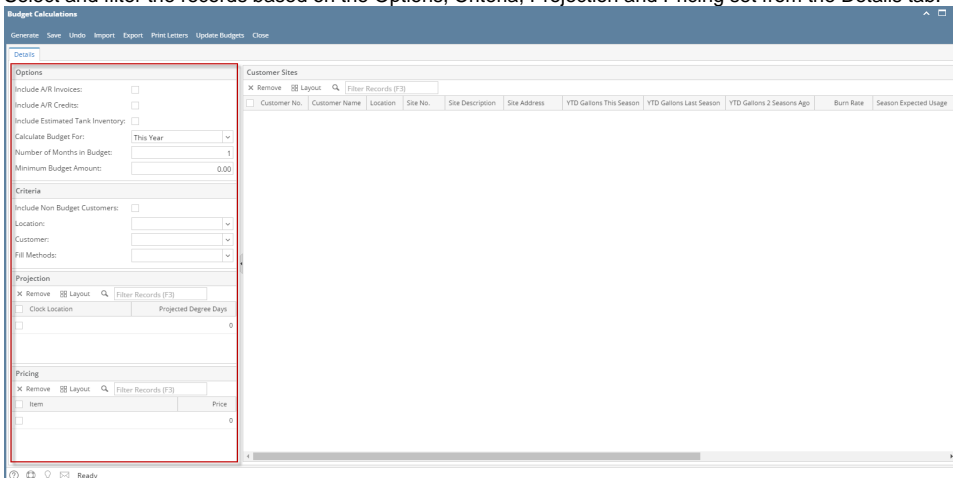
4. You may want to save the generated customer budget by clicking **Save toolbar button**.

- a. Amounts can be manually adjusted before completing the next steps.
  - b. Optional - the Export button can be used to allow users to review data in Excel, make changes, and then Import in those Budget Amounts.
5. Continue with Next step of Updating Budgets - [How to Update Budgets](#)

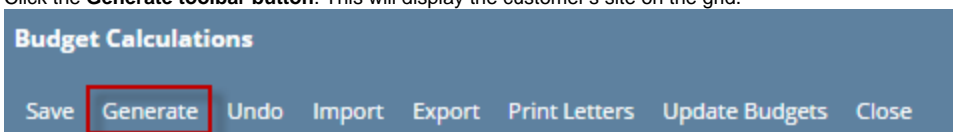
1. On the Menu panel, click **Budget Calculation menu**. This will open the Budget Calculation screen.



2. Select and filter the records based on the Options, Criteria, Projection and Pricing set from the Details tab.



3. Click the **Generate toolbar button**. This will display the customer's site on the grid.



**Budget Calculations**

Generate Save Undo Import Export Print Letters Update Budgets Close

**Details**

**Options**

Include A/R Invoices: ☒

Include A/R Credits: ☐

Include Estimated Tank Inventory: ☐

Calculate Budget For: This Year

Number of Months in Budget: 2

Minimum Budget Amount: 10.00

**Criteria**

Include Non Budget Customers: ☒

Location:

Customer:

Fill Methods:

**Projection**

X Remove Layout Filter Records (73)

☐ Clock Location Projected Degree Days

☐ 001 3

☐ 0

**Pricing**

X Remove Layout Filter Records (73)

☐ Item Price

☐ LPG 1.2

☐ 0

**Customer Sites**

This Season	YTD Gallons Last Season	YTD Gallons 2 Seasons Ago	Burn Rate	Season Expected Usage	Estimated Qty in Tank	Required Qty	Price	Current A/R Balance	Daily Use	Estimated Budget
0	0	0	5	0.6	0	0.6	1.2	0	0	10
0	0	0	5	0.6	0	0.6	1.2	0	0	10

Edited

- You may want to save the generated customer budget by clicking **Save toolbar button**.

**Budget Calculations**

**Save** Generate Undo Import Export Print Letters Update Budgets Close

- On the Menu panel, click **Budget Calculation menu**. This will open the Budget Calculation screen.

**Tank Management**

- Customer Inquiry
- Consumption Sites
- Clock Reading
- Synchronize Delivery History
- Lease
- Generate Orders
- Tank Monitor
- Budget Calculation**
- Virtual Meter Billing
- Devices
- Events
- Renew Julian Deliveries

**Reports**

2. Select and filter the records based on the Options, Criteria, Projection and Pricing set from the Details tab.

**Budget Calculations**

Generate Save Undo Import Export Print Letters Update Budgets Close

**Details**

**Options**

Include A/R Invoices: ☐  
Include A/R Credits: ☐  
Include Estimated Tank Inventory: ☐  
Calculate Budget For: This Year  
Number of Months in Budget: 1  
Minimum Budget Amount: 0.00

**Criteria**

Include Non Budget Customers: ☐  
Location:   
Customer:   
All Methods:

**Projection**

X Remove Layout Filter Records (F3)  
Clock Location:  Projected Degree Days: 0

**Pricing**

X Remove Layout Filter Records (F3)  
Item:  Price: 0

**Customer Sites**

Customer No.	Customer Name	Location	Site No.	Site Description	Site Address	YTD Gallons This Season	YTD Gallons Last Season	YTD Gallons 2 Seasons Ago	Burn Rate	Season Expected Usage
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3. Click the **Generate** toolbar button. This will display the customer's site on the grid.

**Budget Calculations**

Save **Generate** Undo Import Export Print Letters Update Budgets Close

**Budget Calculations**

Generate Save Undo Import Export Print Letters Update Budgets Close

**Details**

**Options**

Include A/R Invoices: ☒  
Include A/R Credits: ☒  
Include Estimated Tank Inventory: ☒  
Calculate Budget For: This Year  
Number of Months in Budget: 2  
Minimum Budget Amount: 10.00

**Criteria**

Include Non Budget Customers: ☐  
Location:   
Customer:   
All Methods:

**Projection**

X Remove Layout Filter Records (F3)  
Clock Location:  Projected Degree Days: 2

**Pricing**

X Remove Layout Filter Records (F3)  
Item:  Price: 1.200

**Customer Sites**

Customer No.	Customer Name	Location	Site No.	Site Description	Site Address	YTD Gallons This Season	YTD Gallons Last Season	YTD Gallons 2 Seasons Ago	Burn Rate	Season Expected Usage	Estimated Qty in Tank	Project HZ Qty	Price	Current A/R Balance	Estimated Budget	
00000029	Customer B	0001 - Farm Hwy.	1	Tank B	111 Princeton Road	0	0	0	0	0.4	0	0.4	1.200	0	0	10
00000030	Customer C	0001 - Farm Hwy.	1	Tank A	124 Main St.	25	0	0	0	0.4	25	221.4	1.200	0	0	100
00000030	Customer C	0001 - Farm Hwy.	2	Virtual Water Site	604 Downcross Street	0	0	0	0	0.4	0	0.4	1.200	0	0	10

4. You may want to save the generated customer budget by clicking **Save** toolbar button.

**Budget Calculations**

**Save** Generate Undo Import Export Print Letters Update Budgets Close