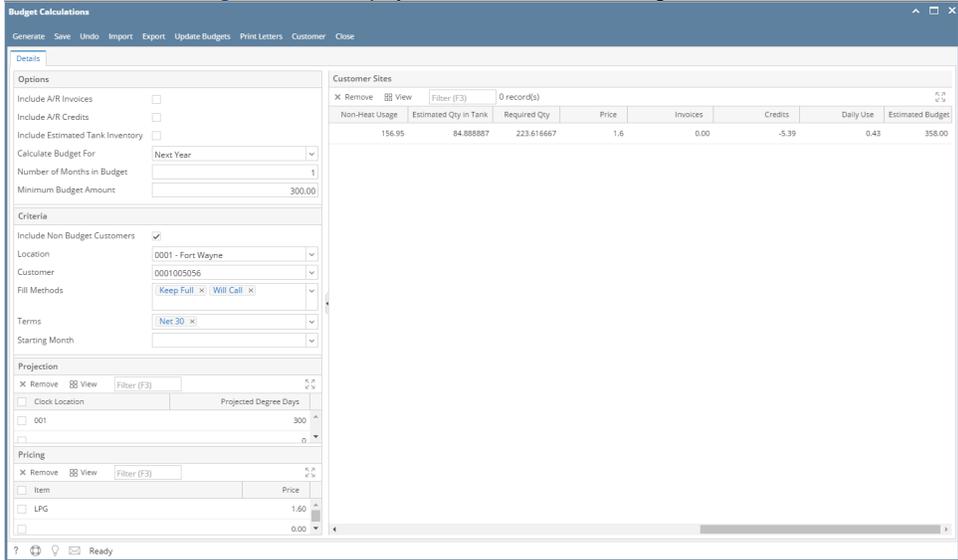


How to Update Budgets

1. On Menu panel, click the **Budget Calculation** menu. This will open the Budget Calculation screen.
2. **Generate Customer Budgets**. This will display the customer's site and budgets based on the criteria that has been set.



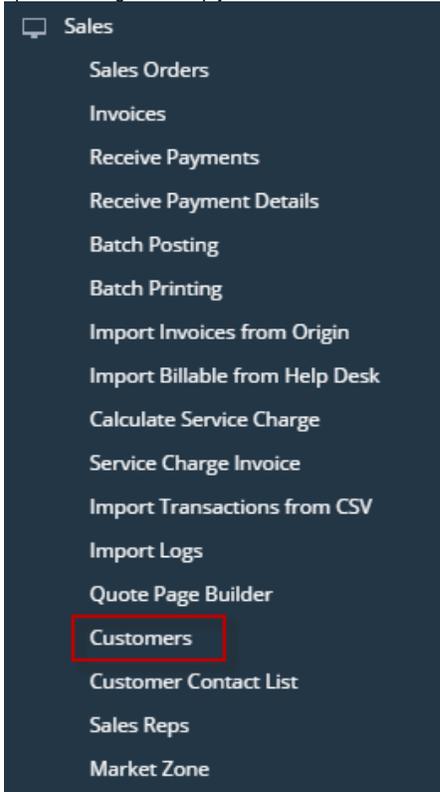
3. Select the customer you want to update the budgets. Click the **Update Budgets** toolbar button.



4. The message below will display during the process and will automatically closes once the update is finished.



5. To check if the customer budget has been updated, click the **Customers** menu from Sales Menu panel and search for the customer with the updated budget or simply click the **Customer toolbar button** from Budget Calculation screen. This will open the Customer Entity search screen.



Customer No.	Customer Name	Location	Site No.	Site Discussion	Site Address	YTD Gallons This Season	YTD Gallons Last Season	YTD Gallons 2 Seasons Ago	Burn Rate	Heating Charge	Nonfuel Charge	Estimated Qty in Tank	Required Qty	Price	Invoiced	Credits	Daily Use	Estimated Budget
00000000	Customer C	000 - Test Region	0001	Test Site C	1234 Main Street	100	0	0	0.0	0.000000	0.000000	0.000000	0.000000	1.0	0.00	0.00	0.00	0.00

6. The Entity screen for the customer will display. Navigate to Customer tab > Misc. This will display the Credit and Budget Details.
7. Check the value in **Budget Details** panel.

o **Before updating the customer budget**

Entity - Customer C

New Save Search Refresh Delete Undo Additional Close

Entity Customer General Locations Contacts Split Farm History Messages Activities (1) Attachments (1) Audit Log (11) Custom

Detail Misc Approval Pricing Taxing Grain Agrimine Patronage License Help Desk Software Transports Commission Buyback Contracts Field xRef

Credit Details

Credit Limit: 5,000.00
 AR Balance: -5.39
 Credit Stop Days: 0
 Credit Code: [Dropdown]
 Active:
 PO Required:
 Credit Hold:

Budget Details

Budget Begin Date: 4/1/2017
 Monthly Budget: 0.00
 No of Periods: 0
 Budget Schedule: [Button]
 Tie Budget to Customer Aging:

Statement Detail

Statement Format: [Dropdown]
 Service Charge: [Dropdown]
 Apply Prepaid Taxes:
 Apply Sales Tax:
 Calc Auto Freight:
 Update Quote: [Dropdown]
 Disc Schedule: [Dropdown]
 Print Invoice: [Dropdown]
 Link Customer No: [Text]
 Referred by Customer: [Dropdown]
 Special Price Group:
 Exclude Dunning Letter:
 Received Signed License:
 Print Price on Pick Ticket:
 Include Entity Name in address:

? [Icons] Ready Page 1 of 1

o **After updating the customer budget**

- a. **Budget Begin Date** - Increases by 1 year if Budget Calculation > Calculate Budget For field = Next Year
- b. **Monthly Budgets** - The budget is updated based on the value in Estimated Budget that has been generated from Budget Calculation screen.
- c. **No. of Periods** - Displays the value entered in Budget Calculation > Number of Months in Budget field. This will determine the number of months created in Budget Schedule screen.
- d. **Budget Schedule** - If Budget is Calculated for Next Year, Budget Date should be expanded by 1 year. All Monthly Amounts should be

equal to the new/updated Budget Amount.

The screenshot shows the 'Entity - Customer C' window with the 'Budget Details' section highlighted in red. The 'Budget Details' section includes the following fields:

- Budget Begin Date: 4/1/2018
- Monthly Budget: 358.00
- No of Periods: 1
- Tie Budget to Customer Aging:

Below the 'Budget Details' section is the 'Customer Budget' table:

Budget Date	Budget Amount	Amount Paid	Is Used
4/1/2018	358	0	<input type="checkbox"/>
	0	0	<input type="checkbox"/>

1. On Menu panel, click the **Budget Calculation** menu. This will open the Budget Calculation screen.
2. **Generate Customer Budgets**. This will display the customer's site and budgets based on the criteria that has been set.

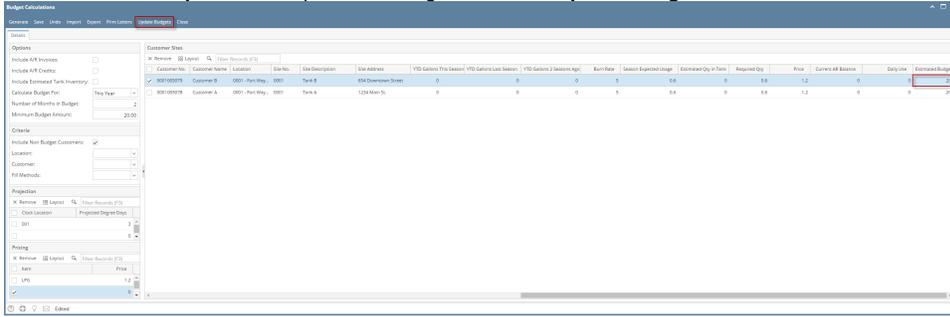
The screenshot shows the 'Budget Calculations' window with the following options and criteria:

- 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: [Dropdown]
 - Customer: [Dropdown]
 - Fill Methods: [Dropdown]
- Projection:
 - Click Location: [Dropdown]
 - Projected Degree Days: [Dropdown]
- Pricing:
 - Item: LPS
 - Price: 1.2

The 'Customer Sites' table is displayed below the options:

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

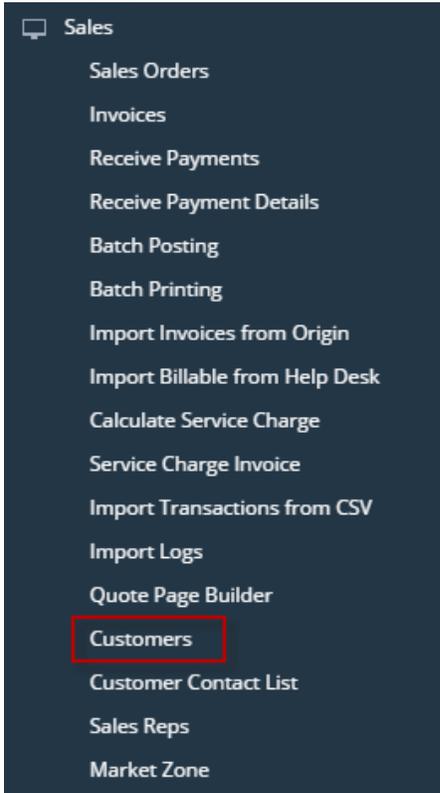
3. Select the customer you want to update the budgets. Click the **Update Budgets** toolbar button.



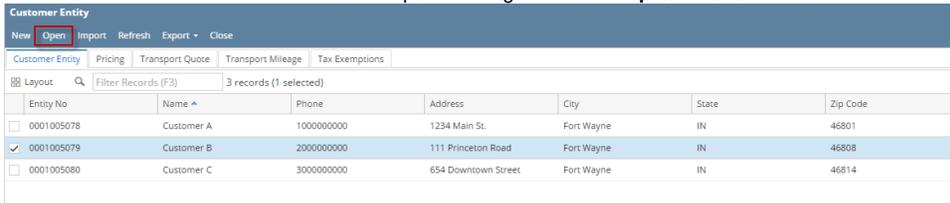
4. The message below will display during the process and will automatically closes once the update is finished.



5. To check if the customer budget has been updated, click the **Customers** menu from Sales Menu panel. This will open the Customer Entity search screen.



6. Search and select for the customer with the updated budget. Click the **Open** toolbar button.



7. The Entity screen for the customer will display. Navigate to Customer tab > Misc. This will display the Credit and Budget Details.

8. Check the value in **Budget Details > Monthly Budget** field. The budget is updated based on the value in Estimated Budget that has been generated from Budget Calculation screen.

○ **Before updating the customer budget**

The screenshot shows the 'Entity - Customer B' form with the 'Customer' tab selected. The 'Budget Details' section contains the following information:

- Budget Begin Date: [Empty]
- Monthly Budget: **0.00** (highlighted with a red box)
- No of Periods: [Empty]

Other fields in the 'Budget Details' section include 'Budget Schedule' and 'Tie Budget to Customer Aging' (unchecked).

○ **After updating the customer budget**

The screenshot shows the 'Entity - Customer B' form with the 'Customer' tab selected. The 'Budget Details' section contains the following information:

- Budget Begin Date: [Empty]
- Monthly Budget: **20.00** (highlighted with a red box)
- No of Periods: [Empty]

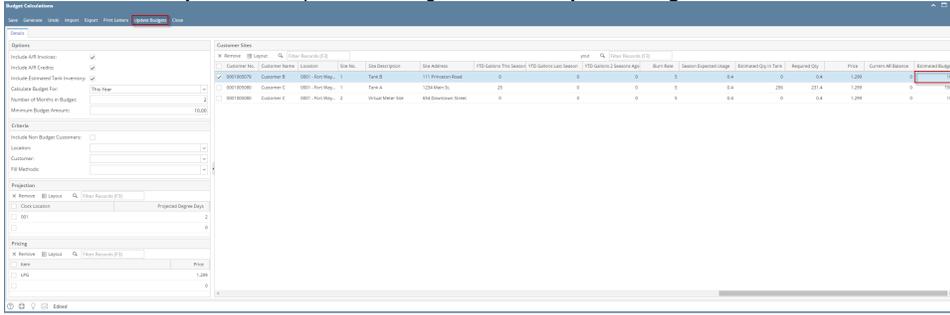
Other fields in the 'Budget Details' section include 'Budget Schedule' and 'Tie Budget to Customer Aging' (unchecked).

1. On Menu panel, click the **Budget Calculation** menu. This will open the Budget Calculation screen.
2. **Generate Customer Budgets**. This will display the customer's site and budgets based on the criteria that has been set.

The screenshot shows the 'Budget Calculations' screen with the following table:

Customer Site	YTD Sales This Month	YTD Sales Last Month	YTD Sales 2 Months Ago	Bull Rate	Swain Budget Change	Estimated Qty in Tank	Required Qty	Price	Current AM Balance	Estimated Budget
00000079 Customer B 880 - Res. Mty. 1 Tank B 111 Princeton Road	0	0	0	5	0.4	0	0.4	1.26	0	10
00000080 Customer C 880 - Res. Mty. 1 Tank A 124 Main St	20	0	0	5	0.4	20	20.4	1.26	0	10
00000080 Customer C 880 - Res. Mty. 2 Vinyl Meter 24 504 Downson Street	0	0	0	5	0.4	0	0.4	1.26	0	10

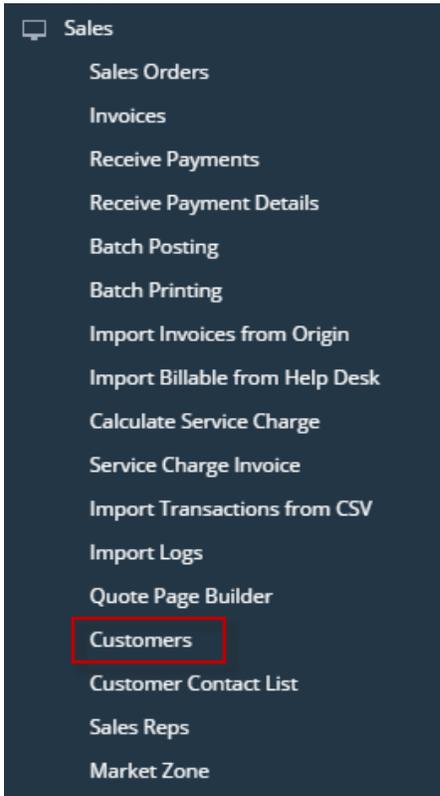
- Select the customer you want to update the budgets. Click the **Update Budgets** toolbar button.



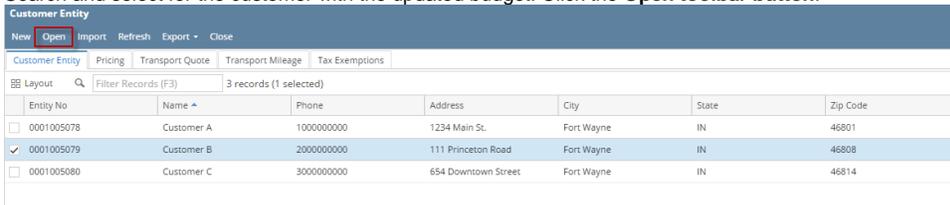
- The message below will display during the process and will automatically closes once the update is finished.



- To check if the customer budget has been updated, click the **Customers** menu from Sales Menu panel. This will open the Customer Entity search screen.



- Search and select for the customer with the updated budget. Click the **Open** toolbar button.



- The Entity screen for the customer will display. Navigate to Customer tab > Misc. This will display the Credit and Budget Details.
- Check the value in **Budget Details > Monthly Budget** field. The budget is updated based on the value in Estimated Budget that has been generated from Budget Calculation screen.

○ Before updating the customer budget

The screenshot shows the 'Entity - Customer B' form with the 'Customer' tab selected. The 'Budget Details' section is visible, containing the following fields:

- Credit Limit: 0.00
- AR Balance: 0.00
- Credit Stop Days: 0
- Credit Code: [dropdown]
- Active:
- PO Required:
- Credit Hold:
- Budget Begin Date: [calendar icon]
- Monthly Budget: 0.00 (highlighted with a red box)
- No of Periods: [input]
- Budget Schedule: [button]

Other sections include 'Credit Details' and 'Statement Details'.

○ After updating the customer budget

The screenshot shows the 'Entity - Customer B' form with the 'Customer' tab selected. The 'Budget Details' section is visible, containing the following fields:

- Credit Limit: 0.00
- AR Balance: 0.00
- Credit Stop Days: 0
- Credit Code: [dropdown]
- Active:
- PO Required:
- Credit Hold:
- Budget Begin Date: [calendar icon]
- Monthly Budget: 10.00 (highlighted with a red box)
- No of Periods: [input]
- Budget Schedule: [button]

Other sections include 'Credit Details' and 'Statement Details'.