How to Update Budgets

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

Budget Calculations									
Details									
Options		Customer Sites							
Include A/R Invoices		× Remove BB Viet	V Filter (F3)	0 record(s)					5.7 2.3
Include A/R Credits		Non-Heat Usage	Estimated Qty in Tank	Required Qty	Price	Invoices	Credits	Daily Use	Estimated Budget
Include Estimated Tank Inventory		156.95	84.888887	223.616667	1.6	0.00	-5.39	0.43	358.00
Calculate Budget For	Next Year V								
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 (F:	3) 23								
Clock Location	Projected Degree Days								
001	300 ^								
	0 *								
Pricing									
X Remove 🔠 View Filter (Fi	3)								
Item	Price								
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	0.00 *	4							÷
? 💭 🖓 🖂 Ready									

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

		ort Update Budgets P																
Decails																		
Customer Sites																		
X Remove (8) V	ew Eller (F3)	0 record(s)																10
😴 Customer No.	Customer Name	Location	Site No.	Site Description	Site Address	YTO Gallons This Seese	YTO Gallors Last Season	1TD Gallons 2 Seasons Ago	Durn Role	Heating Usage	Non-Heat Usings	Estimated Qty in Tank	Required Qty	Price	Involces	Credits	Daily Use	Estimated Budget
✓ 0001005056	Cussomer C	0001 - Fors Wayse	0001	Test Site C	1234 Main Street	175	0	0	4.5	66.666667	156.95	84.000007	223.616667	1.6	0.00	-5.29	0.4	3 158.00

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

Updating Budget/s 🕻

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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.

Sales
Sales Orders
Invoices
Receive Payments
Receive Payment Details
Batch Posting
Batch Printing
Import Invoices from Origin
Import Billable from Help Desk
Calculate Service Charge
Service Charge Invoice
Import Transactions from CSV
Import Logs
Quote Page Builder
Customers
Customer Contact List
Sales Reps
Market Zone

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Generate Save Units Import Suport Update-Budgets PrintLetters C	lucenter filme										
Details											
Customer Stee											
X Remove S View Filter (73) 0 record(s)											н
Customer No. Customer Name Location Site No.	Site Description Site Address	YTD Gallons This Season YTD Gallons Last Season	YTD Galions 2 Seasons Ago	Durn Rate Heat	Usage Non-Heat Usage	Estimated Qty in Tank	Required Qty	Price Inv	ces Credits	Daily Use	Estimated Budget
✓ 0001005056 Customer C 0001 - Port Wayne 0001	Tesi Sile C 1234 Main Sireei	175 0	0	4.5	6.866667 156.95	84.888887	223.616667	1.6	0.00 -5.39	0.43	358.00

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 panel.

Entity Customer G	eneral	Locatio	ins C	ontacts	Split	Farm	History	Messages	Activities	(1) Ati	tachment	s (1)	Audit Log (11)	Custom			
Detail Misc Appro	val P	ricing	Taxing	Grain	Agrir	nine	Patronage	License	Help Desk	Softwa	re Tra	nsports	Commission	Buyback	Contracts	Field xRef	
Credit Details									Statemen	t Detail							
Credit Limit								5,000.00	Statemen	t Forma	t						
AR Balance								-5.39	Service Cl	harge							
Credit Stop Days								0	Apply Pre	paid Tax	xes						
Credit Code								~	Apply Sale	es Tax							
Active	\checkmark								Calc Auto	Freight							
PO Required									Disc Sche	dule							
Credit Hold									Print Invo	ice							
Budget Details									Link Cust	omer No	5						
Budget Begin Date	4/1/2	017							Referred	by Custo	omer						
Monthly Budget								0.00	Special Pr	ice Grou	qu						
No of Periods								0	Exclude D	unning	Letter						
	Bu	dget Sche	edule						Received	Signed L	icense						
Tie Budget to Custon	ner Agir	ng 🗌							Print Price	e on Pick	k licket						
									Include Er	ntity Nar	me in ad	dress					

• 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

tity Customer General Locations Cont	acts Split Farm History Messag	es Activities (1) Attachments (1) Aud	it Log (23) Custom
redit Details	arain Agrimine Patronage License	Statement Detail	commission Buyback Contracts Field xker
		Statement Format	
redit Limit	5,000.00	Service Charge	
redit Stop Days	-0.35	Apply Prepaid Taxes	
Iredit Code		Apply Sales Tax	
Active 🗸		Calc Auto Freight	
O Required		Update Quote	
Iredit Hold		Disc Schedule	
		Print Invoice	
udget Details		Link Customer No	
udget Begin Date 4/1/2018		Special Price Group	
		Special frice Group	
fonthly Budget	358.00	Exclude Dunning Letter	
Ionthly Budget	358.00	Exclude Dunning Letter	
Ionthly Budget	358.00	Exclude Dunning Letter Received Signed License Print Price on Pick Ticket	
No of Periods Budget Schedule Tie Budget to Customer Aging	358.00	Exclude Dunning Letter Received Signed License Print Price on Pick Ticket Include Entity Name in address	
Aonthly Budget No of Periods Budget Schedule Schedule Budget Schedule Budget Schedule Schedule Budget Schedule	358.00	Exclude Dunning Letter Received Signed License Print Price on Pick Ticket	R ← Poge 1 of 1 →
Wanthly Budget No of Periods Budget Schedule Tre Budget to Customer Aging C C C Ready C C Concentration Concentrat	Filter (F3)	Exclude Dunning Letter Received Signed License Print Price on Pick Ticket	I ← Page 1 of 1 →
Aonthly Budget to of Periods Budget Schedule te Budget to Customer Aging C C Ready Undo Close X Remove C View Budget Date	Filter (F3) Budget Amount	Exclude Dunning Letter Received Signed License Print Price on Pick Ticket Include Entity Name In address	I of of Contract o
Aonthly Budget Lo of Periods Budget Schedule Le Budget to Customer Aging C C C C C C C C C C C C C C C C C C C	Filter (F3) Budget Amount 358	Exclude Dunning Letter Received Signed License Print Price on Pick Ticket Include Entity Name in address	Is Used

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

		-									
Detaits											
Options		Customer Sites									
Include A/R Invoices:	×	X Remove 🔡 Layout	Q Filter Records (F3)								
nclude A/R Credits:		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 Budg
nclude Estimated Tank Inventory:		0	0	5	0.6	0	0.6	1.2	0	0	1
Calculate Budget For:	This Year 🗸	0	0	5	0.6	0	0.6	1.2	0	C	1
Number of Months in Budget:	2										
Minimum Budget Amount:	10.00										
Criteria											
nclude Non Budget Customers:	×										
location:	~										
Customer:	×										
Fill Methods:	~	1									
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Clock Location	Projected Degree Davs										
001	3 *										
Pricing											
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Item	Price										
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3. Select the customer you want to update the budgets. Click the Update Budgets toolbar button.

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Decalic																	
Options	Customer Sten																
Include A/R Involces:	× Remove Si Li	eyest Q. Files															
Include A/R Credits:	Customer No.	Customer Name	Location	Site No.	Site Description	Site Address	VTD Gallons This Season VTD Gallons L	act Season V1D Gallo	ns 2 Seasons Ago	Burn Rate Se	eason Expected Usage E	alimated Qty in Tarik	Required Qty	Price	Current AR Balance	Duily Use	Estimated Budget
Include Estimated Tank Inventory:	✓ 0001005079	Customer 8	0001 - Fort Wey.	0000	Tank 8	654 Downtown Street	0	0	0	5	0.6	0	0.6	1.2	0		20
Calculate Budget For: This Year v	0001005078	Customer A	0001 - Port Wey.	0001	Tarin A	1234 Main 5i	0	0	0	5	0.6	0	0.6	1.2	0		20
Number of Months in Budget: 2																	
Minimum Budget Amount: 20.00																	
Criteria																	
Include Non Budget Customers: 🖉																	
Location:																	
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4. The message below will display during the process and will automatically closes once the update is finished.

Updating Budget/s 🌔

5.	To ch searc	neck if the customer budget th screen.	has been updated	I, click the Custor	mers menu from S	ales Menu panel. Th	is will open the	Customer Entity
	Ţ	Sales						
		Sales Orders						
		Invoices						
		Receive Payments						
		Receive Payment Det	ails					
		Batch Posting						
		Batch Printing						
		Import Invoices from	Origin					
		Import Billable from I	Help Desk					
		Calculate Service Cha	rge					
		Service Charge Invoid	e					
		Import Transactions	from CSV					
		Import Logs						
		Quote Page Builder						
		Customers						
		Customer Contact Lis	t					
		Sales Reps						
		Market Zone						
c	Seer	ab and calent for the quoten	or with the undete	d hudget. Click th	Onen toolber b	itten		

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

customer entity						
New Open Import Refresh	Export - Close					
Customer Entity Pricing Tran	nsport Quote Transport Mile	age Tax Exemptions				
B Layout Q Filter Records	(F3) 3 records (1 s	elected)				
Entity No	Name 🔺	Phone	Address	City	State	Zip Code
0001005078	Customer A	100000000	1234 Main St.	Fort Wayne	IN	46801
✓ 0001005079	Customer B	200000000	111 Princeton Road	Fort Wayne	IN	46808
0001005080	Customer C	300000000	654 Downtown Street	Fort Wayne	IN	46814

- 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.

0	Before	updating	the	customer	budget
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etail Misc Pricing	Taxing	Grain	Agrimine	Patron	age A	pplicator	Help D	esk Tra	nsports	Commissi	on Buyba	custom	racts	Field xRef	
redit Details	0		0					Statem	ent Detai	l:]				
Credit Limit:							0.00	Statem	ent Form	at:					
AR Balance:							0.00	Service	Charge						
Credit Stop Days:							0	Apply P	repaid Ta	axes:					
Credit Code:							~	Apply S	ales Tax:						
Active:	~							Calc Au	to Freigh	t:					
PO Required:								Update	Quote:						
Credit Hold:								Disc Sc	nedule:						
								Print In	voice:						
ludget Details								Link Cu	stomer N	lo:					
Budget Begin Date:								Referre	d by Cus	tomer:					
Monthly Budget:	<u> </u>						0.00	Special	Price Gro	oup:					
No of Periods:	-							Exclude	Dunning	g Letter:					
	Budget	Schedule						Receive	d Signed	License:					
								Print Pr	ice on Pi	ck Ticket:					

• After updating the customer budget

New Save Search Re Entity General Custo	fresh Del	ete Und	o Addition	al Close	ons Contac	cts Comm	ents (0) H	istory Attac	ihments (0) N	lessages	Custom Au	dit Log (4)	
Detail Misc Pricing	Taxing	Grain	Agrimine	Patronage	Applicator	Help Desk	License	Transports	Commission	Buyback	Contracts	Field xRef	
Credit Details							Statement	Detail:					
Credit Limit: AR Balance: Credit Stop Days: Credit Code: Active: PO Required: Credit Hold:						0.00	Statement Service Cha Apply Prep Apply Sales Calc Auto P Update Qu Disc Sched	Format: arge aid Taxes: s Tax: reight: ote: ule:					× ×
Budget Details							Print Invoid	:e: mer No:					~
Budget Begin Date:						20.00	Referred b Special Prio	y Customer: ce Group:					~
No of Periods:	Budget	Schedule				20.00	Exclude Du Received S	inning Letter: igned License	:				
Tie Budget to Custome	er Aging:						Print Price Include En	on Pick Ticke tity Name in a	t:				

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

Details																	
Options		Customer Sites															
Include A/R Invoices	2	H Farmove III I	ayout Q, Fil														
Include A/R Gredits:	2	Customer No.	Customer Name	Location	51e No.	Site Description	Site Address	YTD Gallons This Seaso	YTD Gallons Last Season	VTD Gallons 2 Seasons Ag	o Burn Rea	 Season Expected Usage 	Estimated Qty in Tank	Required City	Price	Current AR Balance	Estimated Budget
Include Estimated Tank Inventory:	×	0001005379	Customer B	0001 - Fort Way.		Tark B	111 Princeton Road	0		1		5 1	14 0	0.4	1,299		90
Colculate Budget For:	This Year v	0001005888	Customer C	0001 - Fort Wey.		Tank A	1254 Main St.	25		1		5 1	14 250	231.4	1,299		150
Number of Months in Budget:	2	0001005080	Customer C	0001 - Fert Wey.	2	Virtual Meter Site	654 Downtown Street	0				5 1	14 0	0.4	1,299		10
Minimum Budget Amount	10.00																
Criteria																	
Include Non Budget Customers:																	
Location:																	
Customer																	
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V Perme Millioner G. C.																	
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										_							

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

Save Generate Undo Import E	oport Print Letters Update Budgets Close																
Details																	
Options		Customer Sites															
Include A/R Involces:	8	× Remove 38 L	ayout Q, Fill						your Q								
Include A/R Credits:	×	Customer No.	Cuttorner Name	Location	Size No.	Site Description	Site Address	YTD Galions This Season YTD	Galors Last Season VTD Galors	2 Seasons Ago	Durn Rase	Season Expected Usage	Estimated Qty in Tank	Required Qty	Price	Current AR Estance	Estimated Budget
Include Estimated Tank Inventory	~	✓ 0001005079	Customer B	0001 - Fort Way.		Tank 8	111 Princeton Roed	0	1	0	5	0.4	0	0.4	1.299	0	10
Calculate Budget For:	This Year v	0001005080	Custamer C	0001 - Fort Way.		Tank A	1234 Main 54	25		0	5	0.4	255	231,4	1.299		150
Number of Months in Budget	3	0001005080	Custaner C	0001 - Fort Way.	2	Virtual Meter Site	654 Downsown Street	0		0	5	0.4	0	0.4	1,299		10
Minimum Budget Amount:	10.00																
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4. The message below will display during the process and will automatically closes once the update is finished.

Updating Budget/s

5.	To ch searc	eck if the custome h screen.	er budget has been upda	ated, click the Customer s	s menu from Sales Mer	nu panel. This will open	the Customer Entity
	Ţ	Sales					
		Sales Orders					
		Invoices					
		Receive Payn	nents				
		Receive Payn	nent Details				
		Batch Posting	g				
		Batch Printin	g				
		Import Invoid	es from Origin				
		Import Billab	le from Help Desk				
		Calculate Ser	vice Charge				
		Service Charg	ge Invoice				
		Import Trans	actions from CSV				
		Import Logs					
		Quote Page E	Builder				
		Customers					
		Customer Co	ontact List				
		Sales Reps					
		Market Zone					
6	Soarc	ch and select for th	e customer with the upo	ated budget. Click the C	non toolbar button		

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

Customer Entity								
New Open Imp	ort Refresh	Export - Ck	ose					
Customer Entity	Pricing Tran	nsport Quote	Transport Milea	ge Tax Exemptions				
멾 Layout Q	Filter Records	s (F3)	3 records (1 se	lected)				
Entity No		Name 🔺		Phone	Address	City	State	Zip Code
0001005078		Customer A		100000000	1234 Main St.	Fort Wayne	IN	46801
✓ 0001005079		Customer B		200000000	111 Princeton Road	Fort Wayne	IN	46808
0001005080		Customer C		300000000	654 Downtown Street	Fort Wayne	IN	46814

- 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

tail Misc Prici	ng Taxing Grain	Agrimine Patronage	Applicator Help I	esk Transports Commi	ssion Buyback	Contracts	Field xRef	
redit Details				Statement Detail:				
redit Limit:			0.00	Statement Format:				
R Balance:			0.00	Service Charge				
redit Stop Days:			0	Apply Prepaid Taxes:				
redit Code:			~	Apply Sales Tax:				
ctive:	~			Calc Auto Freight:				
O Required:				Update Quote:				
redit Hold:				Disc Schedule:				
				Print Invoice:				
udget Details				Link Customer No:				
Budget Begin Date:				Referred by Customer:				
Nonthly Budget:	[0.00	Special Price Group:				
lo of Periods:	-			Exclude Dunning Letter:				
	Budget Schedule			Received Signed License:				
				Print Price on Pick Ticket				

0	After updating the customer budget
	Entity - Customer B

sy customer .	Abur Failli	salesper	JON LOCA	cons com	ucis comi	ments (0)	matory	Attachi	nents (0)	messages	custoff	AU	an 20g (10)	
tail Misc Prici	ng Taxing	Grain	Agrimine	Patronage	Applicator	Help Desk	Trans	ports	Commissio	n Buybao	k Contr	acts	Field xRef	
redit Details						9	Statemer	nt Detail:						
redit Limit:						0.00	Statemer	nt Forma	t					
R Balance:						0.00	Service C	harge						
Fredit Stop Days:						0	Apply Pre	epaid Ta:	(es:					
Credit Code:						~	Apply Sal	es Tax:						
Active:	~					(Calc Auto	Freight						
PO Required:						ι	Update C	uote:						
Credit Hold:						E	Disc Sche	dule:						
						F	Print Invo	vice:						
Budget Details						l	Link Cust	omer No						
Budget Begin Date:							Referred	by Custo	omer:					
Monthly Budget:	[10.00	Special P	rice Groi	nb:					
No of Periods:						E	Exclude [Dunning	Letter:					
	Budget	Schedule				F	Received	Signed I	icense:					
						F	Print Pric	e on Picl	k Ticket:					