

# 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.

Non-Heat Usage	Estimated Qty in Tank	Required Qty	Price	Invoices	Credits	Daily Use	Estimated Budget
156.95	84.888887	223.616667	1.6	0.00	-5.39	0.43	358.00

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.



equal to the new/updated Budget Amount.

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 (23) 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  
Active ☒  
PO Required ☐  
Credit Hold ☐

**Budget Details**

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

**Statement Detail**

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

Ready Page 1 of 1

**Customer Budget**

Save Undo Close

X Remove View Filter (F3)

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

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Budget Calculations

Generate Save Undo Import Export Print Letters Update Budgets Close

**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 (F3)  
Clock Location Projected Degree Days  
001 3  
0

**Pricing**

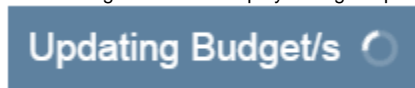
X Remove Layout Filter Records (F3)  
Item Price  
LPG 1.2  
0

**Customer Sites**

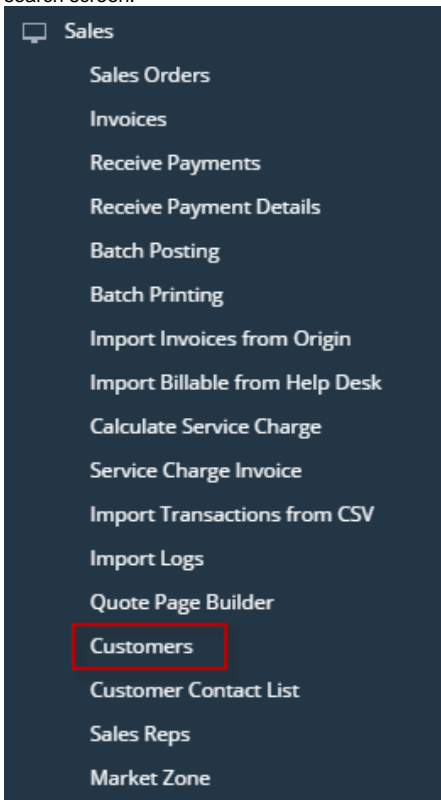
YTD Gallons Last Season	YTD Gallons 2 Seasons Ago	Burn Rate	Season Expected Usage	Estimated Qty in Tank	Required Qty	Price	Current A/R Balance	Daily Use	Estimated Budget
0	0	5	0.6	0	0.6	1.2	0	0	10
0	0	5	0.6	0	0.6	1.2	0	0	10

- 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.

Click the **Open** button for this customer with the updated budget. Click the **Open** toolbar button.

Customer Entity						
New	Open	Import	Refresh	Export	Close	
Customer Entity   Pricing   Transport Quote   Transport Mileage   Tax Exemptions						
<div> <div> <div>Layout</div> <div> <input type="text" value="Filter Records (F3)"/> </div> </div> <div>3 records (1 selected)</div> </div>						
Entity No	Name	Phone	Address	City	State	Zip Code
<input type="checkbox"/> 0001005078	Customer A	1000000000	1234 Main St.	Fort Wayne	IN	46801
<input checked="" type="checkbox"/> 0001005079	Customer B	2000000000	111 Princeton Road	Fort Wayne	IN	46808
<input type="checkbox"/> 0001005080	Customer C	3000000000	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

Entity - Customer B

New Save Search Refresh Delete Undo Additional ▾ Close

Entity

Customer

Split

Farm

Salesperson

Locations

Contacts

Comments (0)

History

Attachments (0)

Messages

Custom

Audit Log (4)

Detail

Misc

Pricing

Taxing

Grain

Agrimine

Patronage

Applicator

Help Desk

Transports

Commission

Buyback

Contracts

Field xRef

Credit Details

Credit Limit:

0.00

AR Balance:

0.00

Credit Stop Days:

0

Credit Code:

▾

Active:

☒

PO Required:

☐

Credit Hold:

☐

Budget Details

Budget Begin Date:

Monthly Budget:

0.00

No of Periods:

Budget Schedule

Statement Detail:

☐

Statement Format:

Service Charge

Apply Prepaid Taxes:

☐

Apply Sales Tax:

☐

Calc Auto Freight:

☐

Update Quote:

Disc Schedule:

Print Invoice:

Link Customer No:

Referred by Customer:

Special Price Group:

☐

Exclude Dunning Letter:

☐

Received Signed License:

☐

Print Price on Pick Ticket:

☐

Ready

1 of 1

- After updating the customer budget

Entity - Customer B

New Save Search Refresh Delete Undo Additional Close

Entity General Customer Split Farm Salesperson Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (4)

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

**Credit Details**

Credit Limit: 0.00

AR Balance: 0.00

Credit Stop Days: 0

Credit Code:

Active: ☒

PO Required: ☐

Credit Hold: ☐

**Budget Details**

Budget Begin Date:

Monthly Budget: 20.00

No of Periods:

Tie Budget to Customer Aging: ☐

**Statement Detail:** ☐

Statement Format:

Service Charge:

Apply Prepaid Taxes: ☐

Apply Sales Tax: ☐

Calc Auto Freight: ☐

Update Quote:

Disc Schedule:

Print Invoice:

Link Customer No:

Referred by Customer:

Special Price Group: ☐

Exclude Dunning Letter: ☐

Received Signed License: ☐

Print Price on Pick Ticket: ☐

Include Entity Name in address: ☐

Ready

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**Budget Calculations**

New... 
  Cancel 
  Import 
  Report 
  Print Layouts 
  Update Budgets 
  Close

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### Options

☒ Include All Expenses  
☒ Include All Credits  
☒ Calculate From Purchase Order  
☐ Calculate Budget From: This Year

Number of Month(s) Budget: 2  
 Minimum Budget Amount: \$0.00

---

### Clients

Include Non-Budget Customers:   
 Location:   
 Customer:   
 Fit Materials:

---

### Properties

☒ Remove 
 ☐ Layout 
 ☐ Filter Records (2/3)

☐ Check Location: Program Degree Day  
 Alt: 0  
 ID: 0

---

### Pricing

☒ Remove 
 ☐ Layout 
 ☐ Filter Records (2/3)

Item:   
 UPS: 1.279  
 Price: 0

---

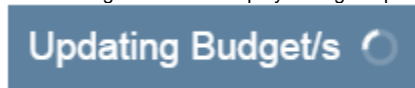
### Customer Data

☒ Remove 
 ☐ Layout 
 ☐ Filter Records (2/3)

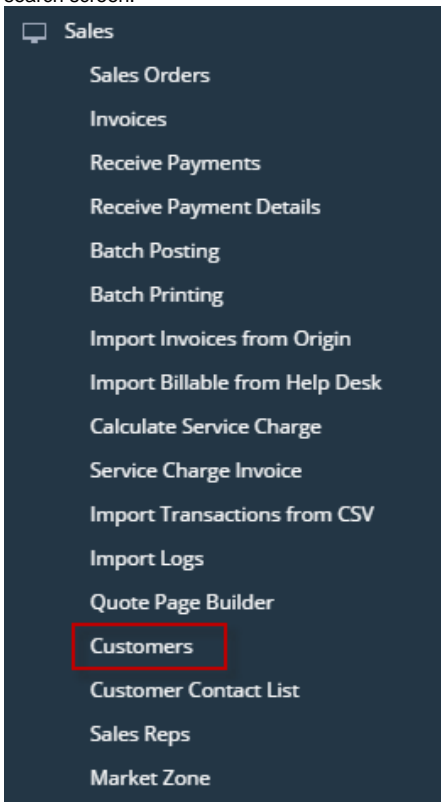
Customer No.	Customer Name	Location	Site No.	Site Description	Site Address	YTD Sales This Season	YTD Sales Last Season	YTD Sales 2 Seasons Ago	Burn Rate	Seasonal Upgrade Index	Estimated Qty in Yr	Required Qty	Price	Current AM Balance	Estimated Balance
00010001A	Customer B	BBB - North Bay	Tank A	1-10 Paved Road		0	0	0	0.4	0	0.4	0	1,200	0	0
00010000B	Customer C	BBB - North Bay	Tank A	1234 Main St.		20	0	0	0.4	200	220.4	1,200	0	0	100
00010000C	Customer C	BBB - North Bay	Virtual Water Site	854 Downcross Street		0	0	0	0.4	0	0.4	1,200	0	0	100

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

Entity No.	Name	Phone	Address	City	State	Zip Code
<input type="checkbox"/> 0001005078	Customer A	1000000000	1234 Main St.	Fort Wayne	IN	46801
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- 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

Entity - Customer B

New Save Search Refresh Delete Undo Additional ▾ Close

Entity Customer Split Farm Salesperson Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (4)

Detail Misc Pricing Taxing Grain Agrimine Patronage Applicator Help Desk Transports Commission Buyback Contracts Field xRef

**Credit Details**

Credit Limit: 0.00  
AR Balance: 0.00  
Credit Stop Days: 0  
Credit Code: ▾  
Active: ☒  
PO Required: ☐  
Credit Hold: ☐

**Budget Details**

Budget Begin Date:   
Monthly Budget: 0.00  
No of Periods:   
Budget Schedule

Statement Detail: ☐  
Statement Format: ▾  
Service Charge: ▾  
Apply Prepaid Taxes: ☐  
Apply Sales Tax: ☐  
Calc Auto Freight: ☐  
Update Quote: ▾  
Disc Schedule:   
Print Invoice: ▾  
Link Customer No:   
Referred by Customer: ▾  
Special Price Group: ☐  
Exclude Dunning Letter: ☐  
Received Signed License: ☐  
Print Price on Pick Ticket: ☐

Ready Page 1 of 1

○ After updating the customer budget

Entity - Customer B

New Save Search Refresh Delete Undo Additional ▾ Close

Entity Customer Split Farm Salesperson Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (10)

Detail Misc Pricing Taxing Grain Agrimine Patronage Applicator Help Desk Transports Commission Buyback Contracts Field xRef

**Credit Details**

Credit Limit: 0.00  
AR Balance: 0.00  
Credit Stop Days: 0  
Credit Code: ▾  
Active: ☒  
PO Required: ☐  
Credit Hold: ☐

**Budget Details**

Budget Begin Date:   
Monthly Budget: 10.00  
No of Periods:   
Budget Schedule

Statement Detail: ☐  
Statement Format: ▾  
Service Charge: ▾  
Apply Prepaid Taxes: ☐  
Apply Sales Tax: ☐  
Calc Auto Freight: ☐  
Update Quote: ▾  
Disc Schedule:   
Print Invoice: ▾  
Link Customer No:   
Referred by Customer: ▾  
Special Price Group: ☐  
Exclude Dunning Letter: ☐  
Received Signed License: ☐  
Print Price on Pick Ticket: ☐

Ready Page 1 of 1