

# Update Budgets/Create Bookings

Last Modified on 04/02/2026 8:35 am CDT

Located in the Energy module under the *Utilities* menu, this utility calculates and updates new budget monthly payments for budget billing customers and creates unpaid Bookings for the total gallons expected to be used by each customer.

## Setup

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Setup Create

Contract Information

Select Customers Cls Select Cust Class

Minimum Gallons 1

Gallon Price 1500.00

# of Billing Periods 12

Min. Budget Pymt Amount 5

Round Budget Amount to 0

Rounding Gallons 50

Equal Billing Cycle All

Include current budget balance in new budget payment calculation

Accumulate budget amount by customer/tank cycle

	Start Date	End Date	Include	Heating Degree Days
1	01/01/2022	12/31/2022	<input checked="" type="checkbox"/>	5508.70
2	01/01/2021	12/31/2021	<input type="checkbox"/>	5005.20
3			<input type="checkbox"/>	
4			<input type="checkbox"/>	
5			<input type="checkbox"/>	

Booking Information

Product <Default Product> Propane - Home Heating

Dept ID Prop00 Prod ID PropHH

When creating bookings, the selected product will be used when the tank does not have a product assigned.

Dates

Date 03/09/2023

Start 04/01/2023

End 04/30/2023

Location Tank Location

Printouts

Print Booking ADOBE PDF # Copies 1

Print Contract ADOBE PDF # Copies 1

Format Signatures

Booking Comments

Save

Cancel

### Contract Information

- **Select Customers** – Choose **Select** to specify customers or **Cust Class** to select all customers by Customer Classification.
- **Minimum Gallons** – The lowest number gallons that may be used when the Booking is created.
- **Gallon Price** – The price to be entered on the Booking.
- **# of Billing Periods** – The number of monthly payments in the budget season.
- **Min. Budget Pymt Amount** – The lowest monthly payment allowed on budget billing.
- **Round Budget Amount to** – Set to round monthly payment amounts to the nearest 5 or 10 dollars.
- **Rounding Gallons** – When calculating the total gallons, select to round this amount to the nearest 50 or 100 gallons.
- **Equal Billing Cycle** – Specify the billing cycle for the utility. This utility may be run multiple times

accommodating different cycles.

- **Include current budget balance in new budget payment calculation** – When calculating the new budget payment amount, this option uses the total dollars of the new budget season contract then adds or subtracts the customer's current budget balance.
- **Accumulate budget amount by customer/tank cycle** – For customers with multiple tanks on budget payments, this option adds the total dollars needed for each tank and then calculates one monthly payment. The payment amount will be associated with one tank while the others will have a 0.00 budget payment.

Five date ranges can be entered and three of those can be used to calculate the quantity and Heating Degree Days for the capture grid. Enter the *Start Date* and *End Date* and choose *Include* if applicable.

### Booking Information

- **Default Product** – Select a product to be used if there is no default product on the Tank.
- **Date** – Select the Booking Date.
- **Start Date** – Select the Booking Start Date.
- **End Date** – Select the Booking End Date.
- **Location** – The selected location is used for each Booking created.
- **Printouts** – Optionally select to print the Booking or Booking Contract (same as from *Booking* window). Select the printer where the documents are to be printed.
- **Booking Comments** – An additional comment may be entered to print on the Bookings created.

Select **Save** to save the changes on the *Setup* tab.

### Calculations

- The prior season and current season delivered amounts and the *Minimum Quantity* from the *Setup* tab are compared. The largest of these three amounts is rounded to the nearest 50 or 100 gallons, based on the *Rounding Gallons* specified on the *Setup* tab, and used for the Booking quantity.
- $Highest\ Gallons * Gallon\ Price = Budget\ Billing\ Dollars$
- $Budget\ Billing\ Dollars / \#\ of\ Billing\ Periods = Monthly\ Payment\ Amount$

## Create

Based on the information on the *Setup* tab and the calculations, this tab summarizes the information for the unpaid Bookings and the new monthly budget payment. Select **Preview** to populate information based on criteria on the *Setup* tab.

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Setup Create

	Post	Cust ID	Customer Name	Tank SN	Equal Billing Cycle	Equal Billing Dept ID	Equal Billing Prod ID	Equal Billing Product	Current Equal Billing \$ Amount	Booking Quantity
1	<input checked="" type="checkbox"/>	CarAd	Carmex, Adam	123456	Monthly	Misc00	BB-LevPay	Monthly Budget Bill/...	75.00	100.00
2	<input checked="" type="checkbox"/>	AndBa	Anderson, Barry	1234567	Monthly	Misc00	BB-LevPay	Monthly Budget Bill/...	75.00	100.00
3	<input checked="" type="checkbox"/>	AdeJa	Ade, James	250156	Monthly	Misc00	BB-LevPay	Monthly Budget Bill/...	6250.00	100.00

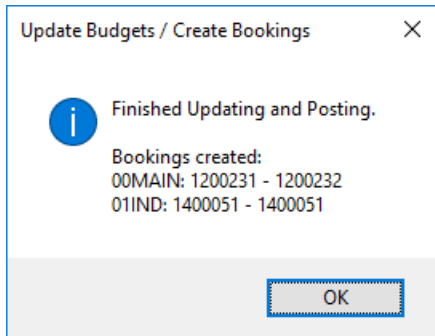
Contract Signed
  Assign Seller Signature

Bookings should not be entered in Advance while posting.

- **Post** – Manually select the boxes in grid for the tanks to be posted, or the **Tag All** button may be used to select all lines.
- **Tag All** – Selects the **Post** box on all lines.
- **Untag All** – Clears checkmarks from the **Post** column on all lines.
- **Contract Signed** – Select this option to indicate the customer has signed the contract. A notification is sent to SKY. Additionally, if the *Disallow edit of a signed booking preference* is selected in Accounting on the A/R tab at *Setup / Preferences*, checking this option will prevent any edits to the Booking after saving.
- **Assign Seller Signature** – Check this option to capture the Seller Signature. A window will display to select the appropriate seller. If the *Seller Signature Only From Logged In User* option is selected in Accounting at *Setup / Preferences* on the A/R tab, the signature of the user logged in will be added to the contract without the option to select another signature from the list. For more on setting up signatures, see [here](#).

Select **Post** to update the monthly payments on the selected tanks plus creates unpaid Bookings in the location(s) specified.

Upon posting, a confirmation displays to show the Bookings created.



These Bookings can be seen at *Accounting / A/R / Product Bookings*.

Booking	Location	Book Date	Customer Name	Comments
1400051	01IND	03/09/2023	Carmex Adam	Monthly Payme...
1200232	00MAIN	03/09/2023	Ade James	Monthly Payme...
1200231	00MAIN	03/09/2023	Anderson Barry	Monthly Payme...

If Bookings are not needed, this grid may be used to manually update the tank monthly payments.