

Getting Started with Energy

Last Modified on 12/21/2022 11:33 am CST

This Agvance module is designed to help track energy inventory, predict when tanks need filled (based on heating degree days), and help organize equal billing customers. Delivery routes are established and truck tickets are recorded. These tickets then import into the Accounting module to be invoiced. The Energy sales occur in the standard Agvance Accounting module.

Setup

There are several areas that must be set up before using the Energy module. In the Accounting module, a general ledger account for Equal Billing Receivables is required, along with a Pay Method for Equal Billing. In the Energy module, information is necessary at *Setup / Preferences* prior to entering energy tickets.

The following is a checklist for customers beginning to use the Energy module:

1. Set up a Budget Billing Receivable G/L at *Accounting / File / Open / G/L Accounts*.
2. Set up a Fuel Department at *Accounting / Setup / Inventory Departments*.
3. Set up Misc. Department (if one does not already exist) at *Accounting / Setup / Inventory Departments*.
4. Set up a Fuel Product in Fuel Department at *Accounting / File / Open / Products*.
5. Set up a Budget Billing Product in Misc. Department pointing to the Budget Billing Receivable G/L at *Accounting / File / Open / Products*.
6. Set up a Budget Billing Pay Method pointing to the Budget Billing Receivable G/L at *Accounting / Setup / A/R / Pay Methods*.
7. Set up Energy Preferences at *Energy / Setup / Preferences*.
8. Customers must be set up before tanks can be added at *Accounting / File / Open / Customers*.
9. Add tanks (Fuel and Budget Billing products should default from *Setup / Preferences*) at *File / Open / Tank Information*.