

Update Equal Billing Info

Last Modified on 01/26/2024 10:08 am CST

See [here](#) for information on updating Budget Billing Memo Invoices.

This utility, found at *Energy / Utilities / Update Equal Billing Info*, was designed to simplify the task of updating the Equal Billing amounts on tanks. Multiple tanks may be edited at one time.

	/	Cust ID	Customer	Serial #	Cycle	Dept. ID	Prod. ID	<Product>	Amount
1	<input type="checkbox"/>	236663	Watt Karly	691987	Monthly	Misc00	BB-LevPay	Monthly Budget Bill/...	133.00
2	<input type="checkbox"/>	AdeJa	Ade James	250156	Monthly	Misc00	BB-LevPay	Monthly Budget Bill/...	500.00
3	<input type="checkbox"/>	AndBa	Anderson Barry	1234567	Monthly	Misc00	BB-LevPay	Monthly Budget Bill/...	500.00
4	<input type="checkbox"/>	CarAd	Carmex Adam	123456	Monthly	Misc00	BB-LevPay	Monthly Budget Bill/...	500.00
5	<input type="checkbox"/>	DAILYT	Daily Tine	354161	Monthly	Misc00	BB-LevPay	Monthly Budget Bill/...	50.00

Load Cycle: Monthly

- **Load Cycle** – Select the cycle to be updated. The grid loads after a cycle is selected from the *Load Cycle* dropdown.
- **Grid** – Equal billing customer information loads into the grid based on the *Load Cycle* selected. Manually update the *Amount* column with the new Equal Billing amounts.
- **Tag All** – This selects all tanks displayed in the grid.
- **Save** – Saving records the new amount in the *Equal Billing* area of the tank information for the selected tanks. This new amount will be used the next time Budget Invoices are posted.

The *Equal Billing Info*, sometimes also called Budget Billing amounts, can be easily updated using a few different methods. This Equal Billing Amount is found on the *Profile* tab of the tank file in the *Equal Billing Info* area, along with the *Cycle* and the product used for the Budget Billing.

The first option to update the Equal Billing amount is to manually edit the amount on the tank file. Using this option, the *Cycle*, *Product*, and *Amount* is manually entered on each individual tank. When using this method, there is no automatic calculation for the amount.

The second option is to use the Update Equal Billing Information utility, found at *Utilities / Update Equal Billing Info*. When using this option, tanks may optionally be filtered by the *Load Cycle*, and the new Budget Billing amount is manually entered into a grid. Other information available to update with this utility is *Cycle* and the *Product* used when processing the Budget Billing Memo Invoices.

	/	Cust ID	Customer	Serial #	Cycle	Dept. ID	Prod. ID	<Product>	Amount
1	<input type="checkbox"/>	236663	Watt Karly	691987	Monthly	Misc00	BB-LevPay	Monthly Budget Bill...	133.00
2	<input type="checkbox"/>	AdeJa	Ade James	250156	Monthly	Misc00	BB-LevPay	Monthly Budget Bill...	500.00
3	<input type="checkbox"/>	AndBa	Anderson Bary	1234567	Monthly	Misc00	BB-LevPay	Monthly Budget Bill...	500.00
4	<input type="checkbox"/>	CarAd	Carmex Adam	123456	Monthly	Misc00	BB-LevPay	Monthly Budget Bill...	500.00
5	<input type="checkbox"/>	DAILYT	Daily Tine	354161	Monthly	Misc00	BB-LevPay	Monthly Budget Bill...	50.00

The third option is to use the Update Budgets/Create Bookings utility found at *Utilities / Update Budgets/Create Bookings*. This utility serves to update the *Equal Billing Amount* on the tank and also creates an unpaid Booking for the upcoming heating season. The information is entered on the *Setup* tab for the program to calculate the number of gallons and amount based on tank history.

Note: The *New Equal Billing \$ Amount* calculated by the utility is appended to the *Booking Comments* on each Booking and is also included when Booking Comments are selected to print on Booking Contracts.

Update Budgets / Create Bookings

Setup Create

Contract Information

Select Customers CIs 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

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

	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"/>	

Save

Cancel

Once this information is set, on the *Create* tab select **Preview** to display the tank information, usage, along with the *New Equal Billing \$ Amount*.

Update Budgets / Create Bookings

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

Tag All Untag All Contract Signed Assign Seller Signature

Bookings should not be entered in Advance while posting.

Post

Cancel

Select the tanks to be posted by selecting the *Post* option. The *Booking Quantity* and the *New Equal Billing \$ Amount* may be manually edited if necessary. Choose **Post** to update the *Equal Billing Amount* on the tank and create an

unpaid Booking in the Accounting module for the calculated gallons of fuel.

For more on this utility, see [Update Budgets/Create Bookings](#).