

Contracting Fuel

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Customer

Update Budgets/Create Bookings Utility

This utility simplifies the process of calculating the amounts for the next budget season and making the contracts for these amounts. It calculates the number of gallons delivered per tank for each season and creates an unpaid Booking for the gallons and values the anticipated gallons to be delivered based on the number of months in the budget season.

For details on completing the *Setup* screen, see *Setup*. Once the setup is done, on the *Create* tab, select **Preview** to load the customers into the grid. The customer information loads based on the entries on the *Setup* tab and the customer's tank file. Use the *Post* checkbox at the beginning of the row to select the customers to process. Selecting **Post** updates the Equal Billing amount on the tank file and creates an unpaid Booking for the customer. If the customer prepays this Booking before deliveries begin, a Payment on Account may be entered at *Accounting / A/R / Payments*.

Partially or Fully Paid Contract

In the Accounting module, add a Product Booking (*A/R / Product Bookings / Add*) for the customer using the fuel product. If the customer is paying, put a checkmark in the *P* column, which is the Paid indicator. If the customer is only paying part of the amount, place a checkmark in the *Dwn* column. With the *Dwn* column marked, double-click in the *<Amt Paid>* column. The amount may be entered as *Percent of Total \$*, *Per Billing Unit*, or *Dollars*. Once the amount is entered, select **Calculate Down Payment**. If the down payment information displayed is correct, choose **Done**. As the customer is invoiced for this fuel product, the prepay money is used proportionally to the down payment amount.

Vendor

Some vendors allow a partial payment (or down payment) to be made to hold a specific price for a product. For instructions on how to record a partial prepayment to a vendor, see [here](#).