

Booking Offers

Last Modified on 07/05/2023 8:10 am CDT

A tool in Accounting to create mass Bookings, located at *Accounting / Utilities / Booking Offers*, gives the ability to gather information to subsequently mass-create Bookings for non-budget tanks as well as any product offered on Bookings.

The Load Set/Save Set capabilities are available and remember the values in the grid. This can be exported to an external file to create contracts so offers can be distributed. Upon being accepted, the **Load Set** can be used to recall information and create a Booking from selected lines.

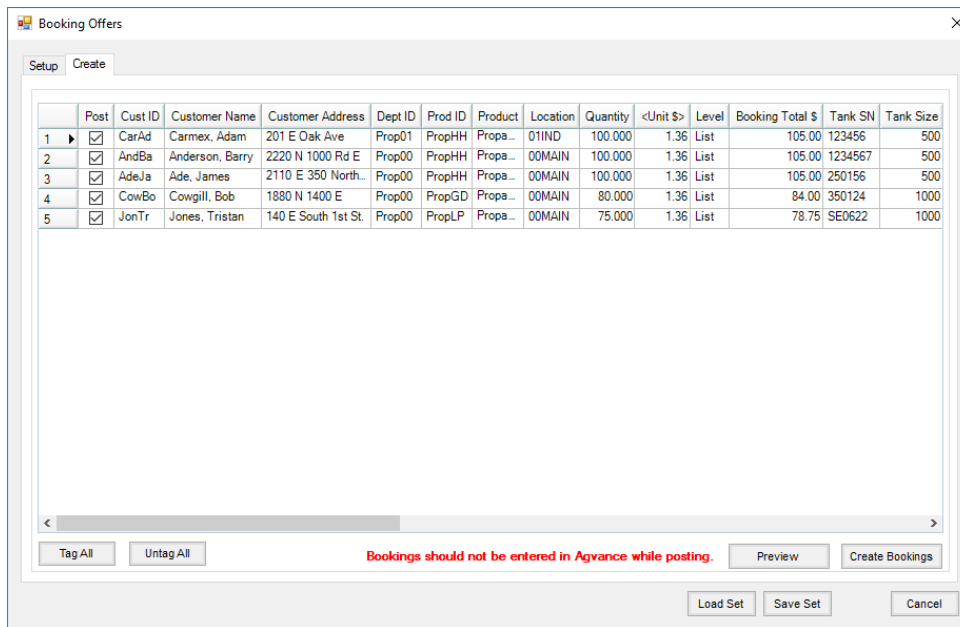
1. On the *Setup* tab, choose **Select** by *Select Customers* to specify for whom a Booking is being entered or select **Cust. Class.** to choose a Customer Classification.

The screenshot shows the 'Booking Offers' window with the 'Setup' tab selected. The 'Select Customers' section has 'Cust. Class.' highlighted in red. The 'Booking Information' section includes a 'Product' field with '<Default Product>' and a checked 'Use tank history' option. The 'Dates' section has 'Date' set to 01/25/2023, 'Start' to 02/01/2023, and 'End' to 02/28/2023. The 'Location' is set to 'DOMAIN'. The 'Printouts' section has 'Print Booking' and 'Print Contract' options, both with '# Copies' set to 1. The 'Booking Comments' field is empty. At the bottom, there are 'Load Set', 'Save Set', and 'Cancel' buttons.

	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"/>	

2. Checking the *Use tank history* option gives the ability to enter five date ranges. Three of those ranges can be used to calculate the quantity and Heating Degree Days. Enter the *Start Date* and *End Date* and choose *Include* if applicable.
3. With *Use tank history* unchecked, selecting a Location from the *Location* drop-down populates dates on the *Create* tab for that Location's tanks and posts the Booking in the Location selected. When *Use tank history* IS checked, dates will be populated for all tanks and the Booking will be posted to the tank Location.
4. A *Default Product* can be chosen by double-clicking in that field. This product will be used on the Booking created.
5. Choose **Save Set** and enter a *Description* to remember options chosen here. When ready to recall the information, select **Load Set**.
6. On the *Create* tab, select **Preview** to display Bookings matching criteria set on the *Setup* tab.
Note: Tanks displaying here are only those not set up with a Budget Billing cycle.
7. Enter the *Quantity* for the product.

- Enter a unit price or double-click in the <Unit \$> field to choose a price. This price can be applied to all in the grid by right-clicking and selecting *Copy Down*. If a Price Level is selected, this will be indicated in the *Level* column.



- Check the *Post* column to create a Booking for that customer. Selecting **Tag All** will select all customers.
- Choose **Create Bookings**. A confirmation message will display giving the range of Bookings created.

