Budget Billing Statements - Energy

Last Modified on 08/19/2024 11:18 am CDT

The Budget Billing Statement can be run in Energy at *Reports / Customer Status*. Selecting **Save Set** saves all options chosen under *Report Criteria*. **Load Set** can then be selected to recall these options to avoid having to select the same options each time.

Report Criteria

- **Select Customers** – Choose **Select** to specify certain Customers or **Cust. Cls.** to choose a Customer Classification including Customers for whom the Budget Billing Statement should be run.
- **Style** – Indicate if the statements should be *Detailed* or *Summarized*.
- **Select Range** – The report can be run by *Date* or *Fiscal Month* with an option to *Include Beg Bal* (Beginning Balance).
- **Memo invoice date** – Indicate the Memo invoice date range to indicate what should be included on the report.
- **Print Which** – Indicate if the *Invoice #* or *Control #* should be printed on the statement.
- **Sort By** – Statements can be sorted by *Customer ID*, *Customer Name*, or by *Zip Code*.
- **Zero Balance with Activity** – Check this option if statements with a zero balance but with activity in the date range indicated should be included when the statements are run.
- **Include all customers regardless of Print Budget Statement setting** – All Customers (based on date(s) and Customer selection) will be included when running the statements regardless of the *Print Budget Statement*

setting found on the Customer's *Miscellaneous Info* tab in Accounting.

- **Suppress Balance Message** – Check this option to ensure the balance message does not display on the statement.
- **Do Not Print Zero quantity Line Items** – Checking this option excludes zero quantity line items to keep the statement clean and easy to read.
- **Include Additional Dataset** – If an additional dataset needs included, indicate it from the drop-down.
- **Message** – Check the Message option to enable the text field. A message can be entered here that will print on all statements.
- **Statement Date** – This date will be printed on all statements.
- **Due Date** – This will be the date payment is due from the Customer.
- **# Copies** – Enter how many copies should be printed.
- **Send to Grower360** – If using Grower360, a *Month* and *Year* can be selected from the drop-down to identify the statement then exported to Grower360 for Customers to review statements there. Checking *Missing Only* will send only statements to Customers that have not already been sent so duplicate statements do not appear for some Customers if rerunning.

Statement

SSI

Barry Anderson
2220 N 1000 Rd E
Assumption, IL 62510

Amount Remitted: _____

Date	Number	Description		Charges	Payments	Balance
		Beginning Balance				0.00
08/01/2024	1200868	Propane- Home Heating (100.00 Gal @ $1.29/Gal)				
			Invoice Total	129.00		-129.00
08/08/2024	120265	Payment of $75.00 (Cash)				
					75.00	-54.00
08/12/2024	120267	Payment of $-75.00 (Cash)				
					-75.00	-129.00
08/18/2024	1200866	Propane- Home Heating (100.00 Gal @ $1.29/Gal)				
			Invoice Total	129.00		-258.00
08/19/2024	120332	Payment of $258.00 (Check)				
					258.00	0.00

Total Quantity Delivered:	**200.00**		***Balance:**	**0.00**

(* A positive balance indicates that payments have
exceeded deliveries. A negative balance indicates
that payments do not fully cover deliveries.)

Statement Message

Barry Anderson
Date: 08/19/2024 11:01:38 AM