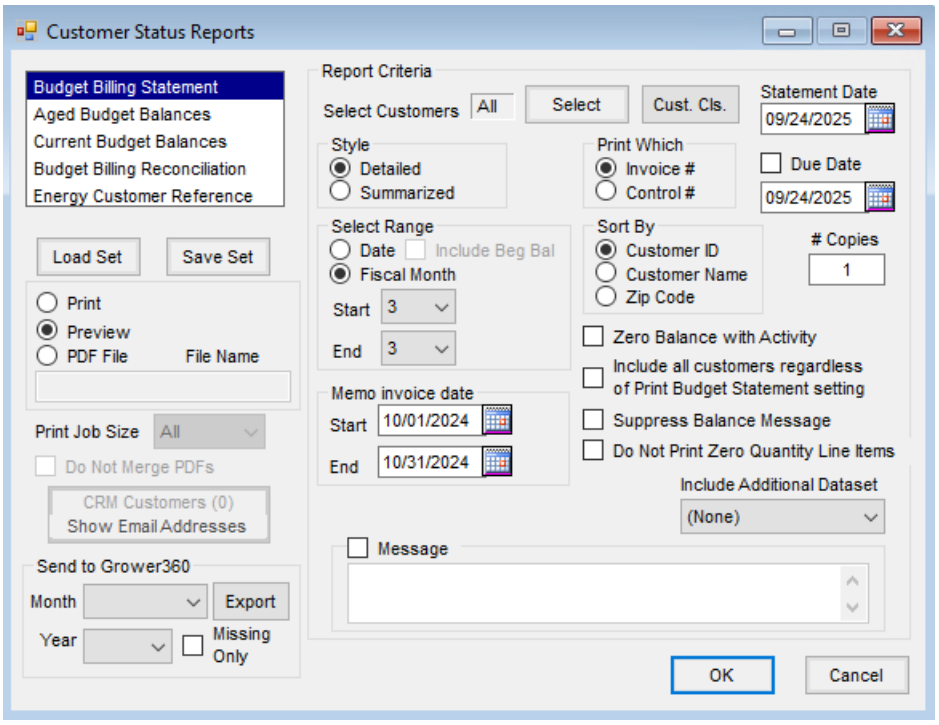
Budget Billing Statements - Energy

Last Modified on 09/25/2025 7:16 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.
- **Print Job Size** – This is available when the *Print* or *PDF File* option is selected. For printing large batches of Statements, selecting a *Print Job Size* reduces the spooling time, allowing the batches to print more efficiently. To break the print job into smaller batches of Customers without manually selecting groups of Customers for separate runs, select one of the options from the drop-down.
- **Do Not Merge PDFs** – When enabled and using a *Print Job Size* other than *All*, these PDFs will not be merged into one PDF and instead will create multiple PDFs based on the *Print Job Size* selected.
- **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

Date: 09/03/2024
ID: AndBa
Due Date : 09/23/2024
Payment(s) Due : $ 0.00

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: 09/03/2024 11:01:38 AM