Contract Gas

Last Modified on 06/18/2025 2:28 pm EDT

Division Billing Type Description Contract Type Expires on Ending Date? Energy Assistance Tax Exempt? 1 1 BUDGET Gallons Image: Contract Type Expires on Ending Date? Energy Assistance Tax Exempt? 1 2 LEVEL PAY Gallons Image: Contract Type Image: Contractype Image: Contract Type <t< th=""><th></th><th></th><th></th><th></th><th></th><th></th></t<>						
11BUDGETGallonsI12LEVEL PAYGallonsI13PRE PAY CONTRACTGallonsI14BUDGET CONTRACTGallonsI15HEAPDollarsI16PREPAYGallonsI17PREPAY DOR CONTRACTDollarsI18BUDGET DOR CONTRACTDollarsI	Division	Billing Type	Description	Contract Type	Expires on Ending Date?	Energy Assistance Tax Exempt?
1 2 LEVEL PAY Gallons I 1 3 PRE PAY CONTRACT Gallons I 1 4 BUDGET CONTRACT Gallons I 1 4 BUDGET CONTRACT Gallons I 1 5 HEAP Dollars I 1 6 PREPAY Gallons I 1 7 PREPAY DOR CONTRACT Dollars I 1 8 BUDGET DOR CONTRACT Dollars I	1	1	BUDGET	Gallons	✓	
1 3 PRE PAY CONTRACT Gallons Image: Contract in the	1	2	LEVEL PAY	Gallons		<u></u>
1 4 BUDGET CONTRACT Gallons Image: Contract con	1	3	PRE PAY CONTRACT	Gallons		
1 5 HEAP Dollars I I 1 6 PREPAY Gallons I	1	4	BUDGET CONTRACT	Gallons		
1 6 PREPAY Gallons Image: Constraint of the state of the	1	5	HEAP	Dollars		V
1 7 PREPAY DOR CONTRACT Dollars Image: Contract in the contract in	1	6	PREPAY	Gallons		
1 8 BUDGET DOR CONTRACT Dollars 🛛	1	7	PREPAY DOR CONTRACT	Dollars		
	1	8	BUDGET DOR CONTRACT	Dollars		
1 9 PURCHASE ORDER CONTRACT Dollars	1	9	PURCHASE ORDER CONTRACT	Dollars		

Please refer to File Management for directions on how to set up proper Billing Types.

Creating a Contract

- 1. From the Main Menu, select Customer and then proceed to Customer Maintenance.
- 2. Select the appropriate customer.
- 3. Choose Contract Gas located to the right of the Customer Information.

File Edit Options Master Menu	Energy Service Help				
i 🚑 🐼 🛤 🔳 🎭 💽 🐁 🖳	🗁 🥒 ? 🔯 🔠 🔁	P 🗊 🎑 🗑			
Div Customer Number	Bill To Name		Address		Phone ^
1 100007	100007 ADAMS, ANSEL		987 RONALD RE	EGAN PARKWAY	(317) 898-4455
1 100006	100006 ALLISON, SHANNON		123 PRODUCTIO	ON DRIVE	(800) 783-6560
1 100002	100002 BELL,EDNA		727 DAN JONES	S RD	(317) 654-6560
1 100005	100005 BROCK, MICHAEL		8877 SHORE LA	ANE	(918) 257-6564
1 100000	100000 DOE, JANE		111 PRODUCTIO	ON DRIVE	(317) 999-9999
1 100004	100004 JONES,CURT		21 JUMP STREE	ET	(317) 545-8897 -
Accounts Receivable Address & In	formation Budget Information	Landlord Tank Rent]		Tank Info
Credit Limit	\$0.00	Status	Active	Date 00/00/00	Credit Information
Current Balance	\$275.00	1	Inactive Reason Code	0 🔍	Appliances
30 Day Balance	\$50.00				Contract Gas
60 Day Balance	\$133.33	Turr	ned Over To Collection	No	History Inquiry
90 Day Balance	\$0.00		Number Of Tanks	1	Purged Inquiry
Total Balance	\$458.33	10	Calae XTD All Tanks	\$458.33	Tank Readings
Call In History		Gallon	s Used YTD All Tanks	0.00	Efficiency
Last Payment Date	11/30/13	Safe	ety Info Received Date	00/00/00	Payment Arrangement
Last Payment Amount	\$100.00				Tickler Information
Last Statement Balance	\$188.33				Meter/RTM Information
Last Statement Date	12/31/13				Print Information
Alternate ID #					Print Label
30 DAYS					Work Orders
Online Access Ta:	x Exemptions User	Defined	Tank Address	Tank Prices	Energy-Image
Service Orders	Proposa	als	Invoic	es	Service Locations

- Note: If Contract Gas is in bold, this means that the customer already has an active contract on file. Multiple contracts can be entered for one customer.
- 4. Enter a *Contract #*. (Contract numbers can only contain letters or numbers) If a contract number is not available, press **Tab** and Energy Force will automatically assign a contract number.

File Edit Options	Master Menu	Energy Service	Help						
🚑 🐼 📣 🗐 🧄		۵ ? 🔍 🗑	u 🗉 🔁 🖻 🗊	S 🗊					
Contract #	Start Date	End Date	Payments Made	-					
2	09/01/13	04/30/14	\$0.00	C	ustomer #	100007	ADAMS, ANSE	L	
					Bill Type	19	PREBUY		
					Price Code/Tier	- 99 <mark>Q</mark>	A 1.750	10 F	Prev Yr 0.0000
					PRE	BUY CONT	RACT PRICE 20	14	
				Ŧ					
Prenaid "Ce	nts Down" ner	Gallon Setun	Prenaid (s ##) ner Gal	lon P	Pod Bal	02	00	
Frepaid Ce	Bar	Ganon Setup	Prepard	paid Dopartm			ψŪ.I	00	
			116	paid Departin		N			
	Prior Year	0.0		Prior Year		\$0.00		Prior Year	\$0.00
	Contracted	1 000 0		Contracted	C1 -	750.00		Contracted	00.00
Gallons	Contracted	1,000.0	Dollars	Contracteu	31,1	/50.00	Sales Tax	Contracted	\$0.00
	Delivered	0.0		Delivered		\$0.00		Delivered	\$0.00
	Remaining	1,000.0		Remaining	\$1,5	750.00		Remaining	\$0.00

- 5. Enter the contract Start Date and End Date.
 - a. The contract will only be available to the customer during this time period.
 - b. If there are multiple contracts with different *Start Dates*, it will use gallons in order of the Start Date. If multiple contracts begin with the same date, it will deplete gallons in no particular order.
 - c. If a contract is selected that is not flagged to expire on an ending date, leave the End Date field blank.
- 6. Enter Payments Made if applicable.
 - If a payment has been posted with a transaction type of 23, it will update the *Payments Made* field automatically.
- 7. Select the Bill Type.
- 8. Select the Price Code/Tier.

Note: This should be a specific price for the contract, not the same Price Code as the tank file.

- 9. Enter Prepaid Cents per Gallon if applicable. Otherwise, leave as \$.00.
- 10. If *Prepaid per Gallon* has been entered, enter the *Prepaid Department* code to which the credited cents will apply.
- 11. Enter the number of gallons *Contracted* by the customer if the contract is based on gallons.
 - By entering the gallons, this will autofill the *Dollars Contracted* column. If the contract is not based on gallons but rather by Dollars, Enter the dollars for which the customer is eligible. By entering the dollars and tabbing out of the field, Energy Force will automatically calculate the number of gallons the customer is entitled to based upon the Price Code chosen.

Note: Before the contract is saved, make sure *Gallons Contracted* or *Dollars Contracted* is greater than 0. Leaving these fields as 0 results in a error stating the field needs populated.

- 12. Enter Sales Tax Contracted if applicable.
- 13. Enter Gallons *Delivered* if a sale has been made to the account since the contract was written. Otherwise, leave as 0.0.
 - By entering gallons, this will autofill the Dollars Delivered.
 - This information will automatically update as the customer is invoiced in the *Sales Posting Menu* or on the *Handheld*.
- 14. Once all fields have been entered for *Gallons*, *Dollars*, and *Sales Tax*, tab to the *Comments/Terms* section on the lower half of the *Contract Entry* screen.
- 15. Enter Comments/Terms if applicable.

Comment/Terms	Assign Tank or Meter/RTM to this Contract	
to be used for house tank only!!	Each contract must be assigned or "Tred To" a Tank or a Meter This contract can NOT be saved unless this relationship is established. Assign Tank To Contract Assign Meter/RTM to Contract	<u>OK</u> <u>Cancel</u>

16. Go to the Assign Tank or Meter/RTM to this Contract tab and select Assign Tank to Contract or Assign

Meter/RTM to Contract.

- Each contract must be assigned a Tank or Meter. Otherwise, it cannot be saved.
- 17. Select the customer tank to which the contract applies.
 - Select the customer account to which the contract applies.
 - If the customer has more than one tank, select the appropriate tank from the list of tanks that displays.
- 18. Select tanks by placing a checkmark in front of the individual tank or select multiple tanks at once in

the Selection area.

Selec	t - Tanl	k/Customer								~
Calaat	2 Div	Social Number	Tune	Tenk Name	Total Can	Droduct	Description	Cust Tures	Customer Tune Description	
Select	? Div	Senai Number	Type	Tarik Name	Total Cap	Floduct	Description	Cust Type	Customer Type Description	
	1	646578P	P	house	1000	1000	RESIDENTIAL PROPANE	1	RESIDENTIAL	
	1	CUSTOWNS'	Р	shop	250	1001	COMMERCIAL PROPANE	2	COMMERCIAL	
	1	DIESEL	DD	barn	500	3000	DYED DIESEL FUEL	3	AGRICULTURAL	_
										-
										-
	_	1		1						_
Last De	el 00/0	00/00 Hold Date (0/00/0	0 Hold Reaso	on O		Selection	n: DD 📃	P 🔲	
Gals L	st Del	0.00 Hold Release	e Date	00/00/00 H	old K-facto	r Calcula	tions N		Sava Changes Canes	
									Save Changes Cance	
								*		

- 19. Selecting the tank type in the *Selection* area will assign all tanks assigned to that customer with that specific tank type.
- 20. Select Save Changes. This will return to the Contract Setup screen.
- 21. Review the Contract Setup Screen for accuracy. Click OK when complete.



22. The *Customer Maintenance* screen will display. The *Contract* tab should now be in **bold** to indicate the customer has an active contract on file.

Additional Notes Regarding Contracts

- An active contract is one that is within the beginning and ending date parameters set. The contract must also have gallons available for sale.
- Sales to a contract exceeding the gallons left will make an automatic adjustment to the account.
 - Example: Joe's Ag has 400 gallons available on a contract; however, a sale is made to Joe's Ag for 500 gallons. The system will calculate 400 gallons at the contract price and will bill the remaining 100 gallons according to the Pricing Tier that has been applied in the *Product* section of the *Tank* screen. Below is an example of how a contract overage journal will appear:

Tank S/	V 3141			Tai	nk Nam	e	Tank Size	<u>_</u>							
Date	Drvr	Jrni	Ticket#	Code	Dept	Posting Referen	Quantity	Gallons	Unit Price	Line Amt	Sales Tax	Debit Amt	Credit Amt	Balance	1
01/14/14	2	10803	16765	13	40006	EP GOVERNMEN	200.00	0.00	1.5400	\$308.00	\$0.00	\$308.00		\$5,460.20	
01/14/14	2	10803	16765	15	40006	EP GOVERNMEN	600.00	0.00	1.3500	\$810.00	\$0.00	\$810.00		\$5,152.20	
01/14/14	2	10803	16765	14	40006	EP GOVERNMEN	0.00	800.00	0.0000	\$0.00	\$0.00	\$0.00		\$4,342.20	
03/12/13	7	9734	85374	13	40006	EP GOVERNMEN	70.00	0.00	1.2900	\$90.30	\$0.00	\$90.30		\$4,342.20	
03/12/13	7	9734	85374	14	40006	EP GOVERNMEN	0.00	340.00	1.4900	\$0.00	\$0.00	\$0.00		\$4,251.90	
03/12/13	7	9734	85374	15	40006	EP GOVERNMEN	270.00	0.00	1.4900	\$402.30	\$0.00	\$402.30		\$4,251.90	
01/15/13	7	9350	84937	14	40006	EP GOVERNMEN	0.00	330.00	1.4900	\$0.00	\$0.00	\$0.00		\$3,849.60	

- Trans code 14 is for full gallons to update tank percentage.
- Trans code 15 is for gallons covered by contract and at contract price.
- Trans code 13 is for gallons not covered by contract and at daily tank price.
- The system allows multiple contracts for the same tank and they can have the same beginning and ending date. However, the system will randomly select the first contract that it can find. To have the system use a specific contract first, use different start dates.
 - **Example:** If there are three contracts with the starting dates of 10/01/22, 10/03/22 and 10/05/22, it will apply gallons to them in chronological date order. If they all started with 10/01/22, there is no control over which contract the system will pick.
- If a customer has more than one contract tied to a tank, the system will exhaust all gallons on the first contract before it will apply the gallons to the next available contract. The rules of the second contract will apply to the remainder of the gallons.

Tanks tied to another person's contract will show the person delivered to with a transaction code of 14 (gallon delivery) for k-factor. However the charges will be applied to the contract account.

Example: Michael Brock is on Jane Doe's contract.

Michael receives a delivery of 175 gallons with a transaction code 14 (gallon delivery) for k-factor purposes at zero dollars.

Jane Doe will be charged a transaction code 15 (contract delivery) contract price for the 175 gallons.

02/19/14	15:	15					Sa	es Postir	ng Journ	al		Page	1
User ID)											Posting Date	02/19/14
												Journal #	3
								Journal	Detail				
Ticket	Div	Cust	omer#	Name	е						Line		
	Trans	Driver	Date	Dept	t. R	eferenc	e		Parts	Gallons	Amount	Sales Tax	Total Amt
	Tank Se	erial #	٦	Tax	St %	End %	Mtr Read	Unit Price					
3	1		100000	DOE,	JANE								
	15	1 0	2/19/14	10	00 RE	SIDENTI	AL PROPAN	E					
	SPARE			Ν	10	68	0	1.7500	175.00	0.00	\$306.25	\$0.00	\$306.25
4	1		100005	BRO	ск,мі	CHAEL							
	14	1 0	2/19/14	10	00 RE	SIDENTI	AL PROPAN	E					
	SPARE			Ν	10	68	0	0.0000	0.00	175.00	\$0.00	\$0.00	\$0.00
												· ·	
		Tota	Is:						175.00	175.00	\$306.25	\$0.00	\$306.25

Jane's contract *Delivery History* will reflect the decrease of contracted gallons.

Contract # 8797636	Start Date 09/01/13	End Date 04/30/14	\$0.00	Payments Made	· ·	Customer # 100000 Bill Type Price Code/Tier PREBUY CO	DOE, JANE 1 PREBUY 99 A A ITRACT PRICE 2014	1.7500	Prev Yr
Prepaid "Ce	ents Down" per Bar	Gallon Setup	Prepaid (\$.##) per Ga Prepaid Departn	lion Ppd B	al \$0.00				
Gallons	Prior Y Contra Deliver Remain	ear cted ed ning	0.0 1.000.0 175.0 825.0	Dollars	Prior Year Contracted Delivered Remaining	\$0.00 \$1,750.00 \$306.25 \$1,443.75	Sales Tax	Prior Year Contracted Delivered Remaining	\$0.00 \$0.00 \$0.00 \$0.00
Comment/Terms			Delivery History Tank 02/19/14	s) on Contract Date Gas Del To 10000	0	Qty C 175.00	Velivered \$0.00	Sales Tax	Line Amount \$306.25