Contract Gas

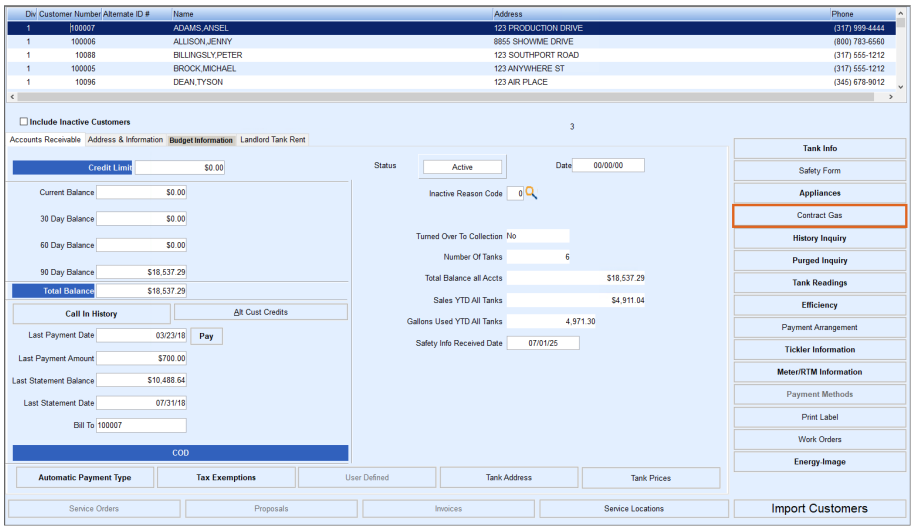
Last Modified on 08/14/2025 4:21 pm EDT

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

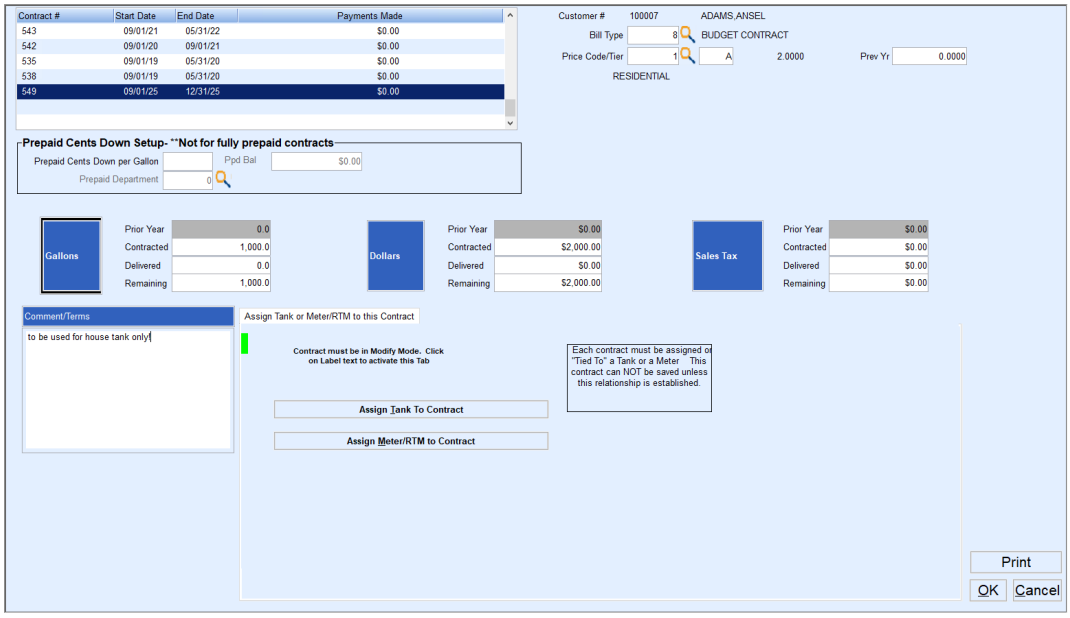
Division	Billing Type	Description	Contract Type	100% PrePaid	Expires on Ending Date?	Energy Assistance Tax Exempt?	Contr Print Type	Description
1	1	PREBUY	Gallons	☐	☑	☐	0	
1	2	.25 MAX PRICE	Gallons	☐	☑	☐	0	
1	3	CENTS DOWN	Gallons	☐	☑	☐	0	
1	4	BUDGET	Gallons	☐	☑	☐	0	
1	5	ENERGY ASSISTANCE	Dollars	☐	☐	☐	0	
1	6	LEVEL PAY	Gallons	☐	☑	☐	0	
1	7	PRE PAY CONTRACT	Gallons	☐	☑	☐	0	
1	8	BUDGET CONTRACT	Gallons	☐	☑	☐	0	
1	9	HEAP	Dollars	☐	☐	☑	0	
1	10	PREPAY	Gallons	☐	☑	☐	0	
1	11	PREPAY DOR CONTRACT	Dollars	☐	☑	☐	0	
1	12	BUDGET DOR CONTRACT	Dollars	☐	☑	☐	0	
1	13	PURCHASE ORDER CONTRA	Dollars	☐	☐	☐	0	
2	1	PREBUY	Gallons	☐	☑	☐	0	
2	2	MAX PRICE	Gallons	☐	☑	☐	0	
2	3	CENTS DOWN	Gallons	☐	☑	☐	0	
2	4	BUDGET	Gallons	☐	☑	☐	0	

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.



   - **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.



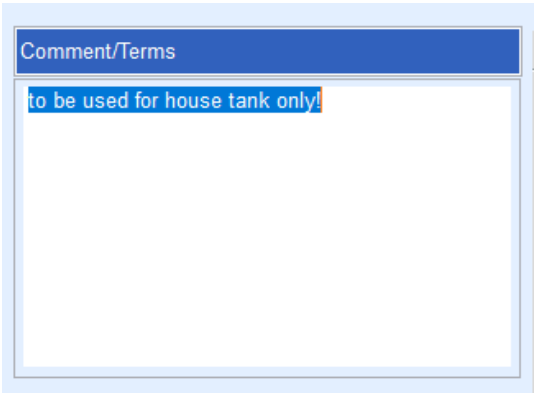
5. Enter the contract *Start Date* and *End Date*.
    a. The contract will only be available to the customer during this time period.
    b. If there are multiple contracts with different *Start Dates*, it will use gallons in order of the Start Date. If multiple contracts begin with the same date, it 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.

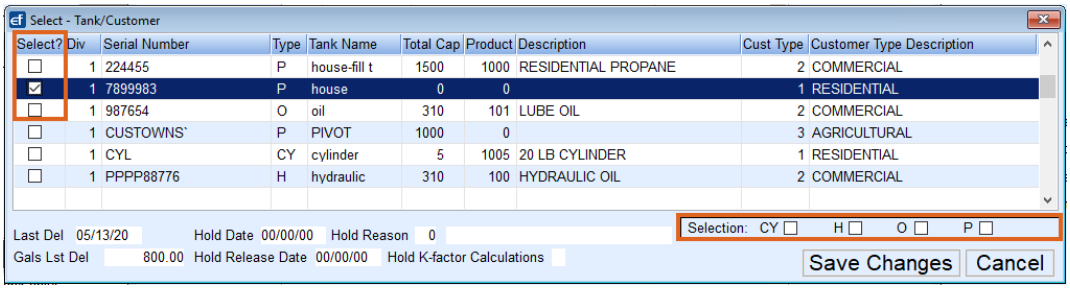
      Note: Before the contract is saved, make sure *Gallons Contracted* or *Dollars Contracted* is greater than *0*. Leaving these fields as 0 results in a error stating the field needs populated.
12. Enter Sales Tax *Contracted* if applicable.
13. Enter Gallons *Delivered* if a sale has been made to the 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*.

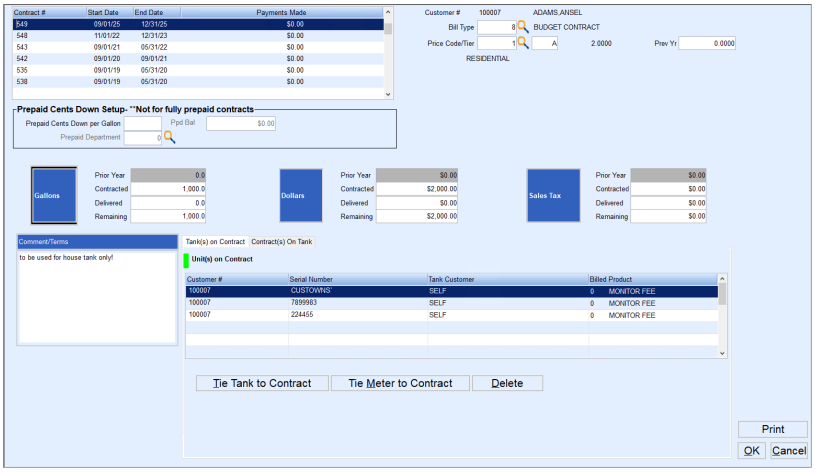
14. Once all fields have been entered for *Gallons*, *Dollars*, and *Sales Tax*, tab to the *Comments/Terms* section on the lower half of the *Contract Entry* screen.
15. Enter *Comments/Terms* if applicable.



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.



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/N 3141 | Tank Name | Tank Size

Date	Drvr	Jrnl	Ticket#	Code	Dept	Posting Referen...	Quantity	Gallons	Unit Price	Line Amt	Sales Tax	Debit Amt	Credit Amt	Balance
01/14/14	2	10803	16765	13	40006	EP GOVERNMEI	200.00	0.00	1.5400	$308.00	$0.00	$308.00		$5,460.20
01/14/14	2	10803	16765	15	40006	EP GOVERNMEI	600.00	0.00	1.3500	$810.00	$0.00	$810.00		$5,152.20
01/14/14	2	10803	16765	14	40006	EP GOVERNMEI	0.00	800.00	0.0000	$0.00	$0.00	$0.00		$4,342.20
03/12/13	7	9734	85374	13	40006	EP GOVERNMEI	70.00	0.00	1.2900	$90.30	$0.00	$90.30		$4,342.20
03/12/13	7	9734	85374	14	40006	EP GOVERNMEI	0.00	340.00	1.4900	$0.00	$0.00	$0.00		$4,251.90
03/12/13	7	9734	85374	15	40006	EP GOVERNMEI	270.00	0.00	1.4900	$402.30	$0.00	$402.30		$4,251.90
01/15/13	7	9350	84937	14	40006	EP GOVERNMEI	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.

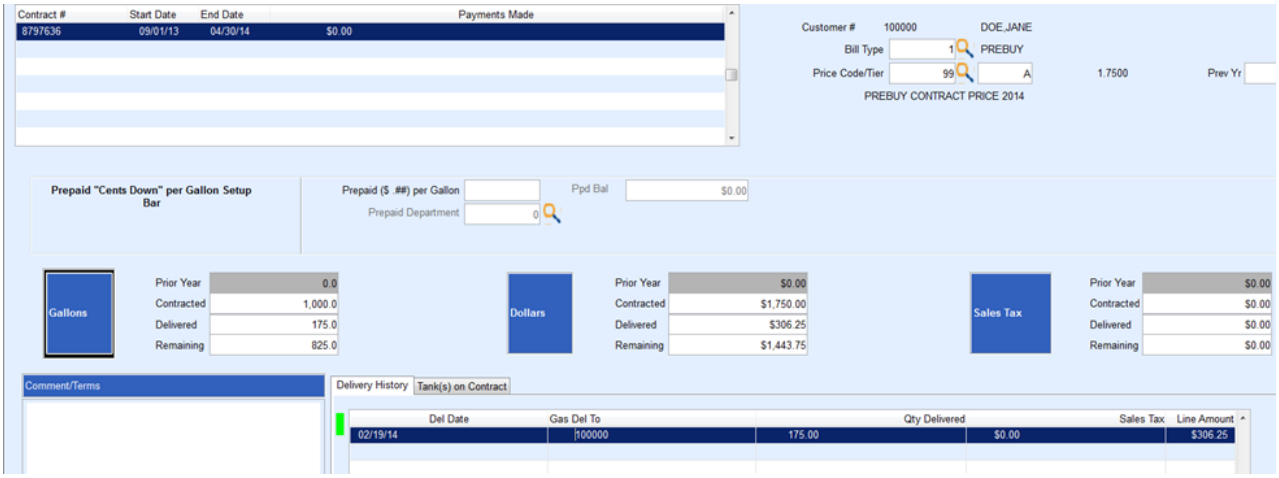
Example: Michael Brock is on Jane Doe's contract.

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 **Sales Posting Journal** Page 1
User ID Posting Date 02/19/14
Journal # 3

Journal Detail

Ticket	Div / Trans / Tank	Customer# / Driver / Serial #	Name / Date / Tax	Dept. / St %	Reference / End %	Mtr Read	Unit Price	Parts	Gallons	Line Amount	Sales Tax	Total Amt
3	1	100000	DOE,JANE									
	15	1 02/19/14		1000 RESIDENTIAL PROPANE								
	SPARE		N	10	68	0	1.7500	175.00	0.00	$306.25	$0.00	$306.25
4	1	100005	BROCK,MICHAEL									
	14	1 02/19/14		1000 RESIDENTIAL PROPANE								
	SPARE		N	10	68	0	0.0000	0.00	175.00	$0.00	$0.00	$0.00
	Totals:							175.00	175.00	$306.25	$0.00	$306.25

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