

Product Level Contracts

Last Modified on 10/22/2024 9:07 am EDT

Product Level Contracts are used to upcharge deliveries to contracts when premium products are delivered against base product contracts. This is common during the winter when fuel with cold weather additives are delivered.

Rules

- The system setting for *ProductLevelContract* must be set to Y.

Category	Setting Name	Actual Value
Contracts	ProductLevelContract	Y

- All contracts will need to have the contracted product added. This includes contracts that will not be upcharged and any contracts already in Energy Force.

Contract #	Start Date	End Date	Payments Made
1402737	03/01/23	11/30/23	\$0.00
1402738	03/01/23	11/30/23	\$0.00
1402740	03/01/23	11/30/23	\$0.00
1401522	03/01/22	11/30/22	\$0.00
1401523	03/01/22	11/30/22	\$0.00
1400777	02/28/22	11/30/22	\$0.00

Customer #		
Bill Type	1	PREPAID FUEL
Price Code/Tier	999	A 3.1600
CONTRACT PRICE		
Delivered Product	130	RUBY - BULK

- Upcharges happen automatically in EnergyTrack.
- Manual sales posting does NOT automatically process upcharges. Any applicable charges will need to be manually added during posting.
- Any product delivered to a tank attached to a Product Level Contract will consume contract gallons. The contract gallons are not product-specific.
- The upcharge price per gallon is calculated by using the price in the price tables by subtracting the base price from the premium price. The Price Codes to use in the calculation can be identified by selecting **Contract Product XRef** at *Supervisor Menu / Maintenance Menu*.

Department Maintenance Table Setup

Departments need to be set up for the upcharges at *Supervisor Menu / Maintenance Menu / Maintenance Tables / Department*.

Div	Dept	Description	Department Type	Sale	Fed Tax	Other	Tank Type	Gas Dept	General Ledger
1	903	#1 RM PRICE DIFFERENCE	Sale	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
	1	904 #1 RUBY PRICE DIFFERENCE	Sale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
	83	903 #1 RM PRICE DIFFERENCE	Sale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
	83	904 #1 RUBY PRICE DIFFERENCE	Sale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			

Interface Billing Code	0
Posting Transaction Code	13
Allow Discounts	<input type="checkbox"/>
Inactive Departments	False
Global Department	<input checked="" type="checkbox"/>

- Enter the *Div* number. Departments need to be set up in Division 1 and any other applicable Divisions/Locations.

2. Enter the *Dept* number.

Note: If interfacing with another software, make sure to add the new department to the cross reference table (CFT).

3. Enter a *Description* for the new department.

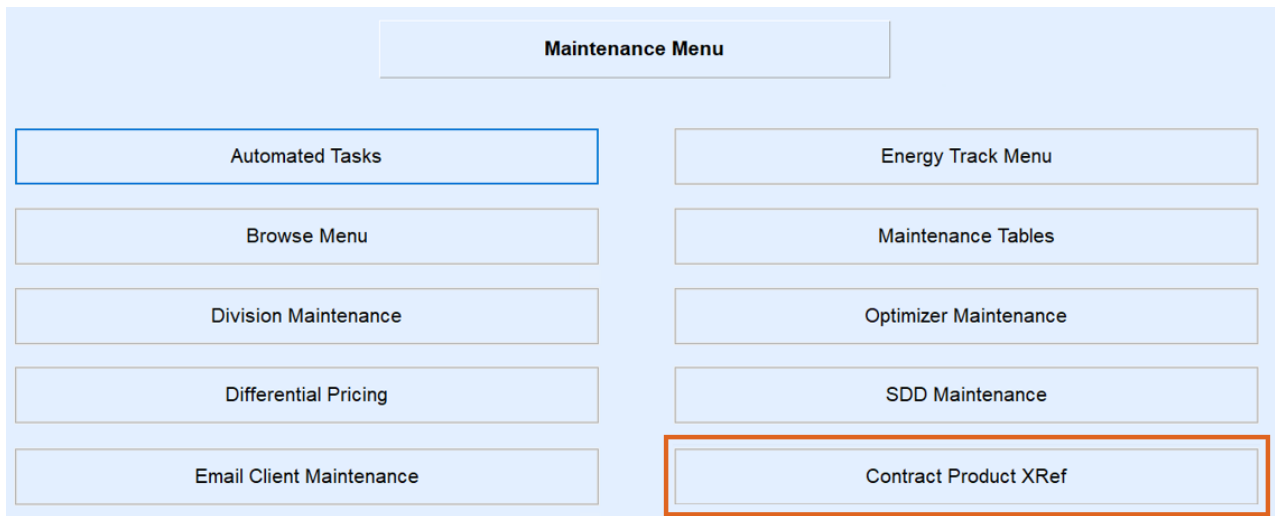
4. The *Department Type* should be set to *Sale*.

5. The *Posting Transaction Code* should be set to 13.

6. The *Global Department* option needs to be checked.

Upcharge Maintenance Table Setup

Go to *Supervisor Menu / Maintenance Menu* and select **Contract Product XRef**.



All products delivered to tanks with contracts that need to be upcharged should be listed in this table.

Delivered Product	Delivered Price Code	Delivered Price Tier	Contracted Product	Upcharge From Product	Upcharge From Price Code	Upcharge From Price Tier	Upcharge Posting Department
111 #1 ROADMASTER - BULK	111 #1 ROADMASTER - BULK	A	110 ROADMASTER - BULK	110 ROADMASTER - BULK	110 ROADMASTER - BULK	A	903 #1 RM PRICE DIFFERENCE
131 #1 RUBY - BULK	131 #1 RUBY - BULK	A	130 RUBY - BULK	130 RUBY - BULK	130 RUBY - BULK	A	904 #1 RUBY PRICE DIFFERENCE
150 UNL 87 OCTANE - BULK	150 UNL 87 OCTANE - BULK	A	151 UNL 87 OCT (10% ETHANOL)-BULK	151 UNL 87 OCT (10% ETHANOL)-BULK	151 UNL 87 OCTANE (10% ETHANOL) - BL	A	905 UNL PRICE DIFFERENTIAL
510 ROADMASTER-DIRECT SHIP	110 ROADMASTER - BULK	A	110 ROADMASTER - BULK	0	0		0
530 RUBY-DIRECT SHIP	130 RUBY - BULK	A	130 RUBY - BULK	0	0		0
551 UNL 87 OCT(10%ETH)-DIRECT SHIP	151 UNL 87 OCTANE (10% ETHANOL) - BL	A	151 UNL 87 OCT (10% ETHANOL)-BULK	0	0		0

1. Enter the *Product* that will be delivered.

2. Indicate the *Price Code* associated the delivered product.

3. Enter the *Price Tier*.

4. Indicate the *Contracted Product*.

5. Under the *Upcharge From Product* field:

a. Enter the *Upcharge From Product* (base product of contract).

b. Enter the *Upcharge From Price Code*.

c. Indicate the *Upcharge From Price Tier*.

d. Enter the *Upcharge Posting Department* for the delivered product.

Example

- The contract is for Ruby (Department 130) and 100 gallons of #1 Ruby (Department 131) is delivered.

- The price for Ruby (Price Code 130 A) is \$3.10 and the Price Code for #1 Ruby (Price Code 131 A) is \$3.45.
- When the delivery is made in EnergyTrack, an additional line will be added to Department 904 for a quantity of 100 at \$0.35 (total of \$35.00).