AFD with Product Level Contracts

Last Modified on 12/09/2025 9:52 am EST

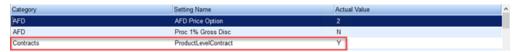
Purpose: To upcharge premium product billings that are applied against a base product contract.

Rules

1. Only applicable when using AFD Price Option 2 (cost plus margin). Below is a screenshot from the Division Maintenance / System Setting table.



2. Product Level Contracts must be turned on and Products must be filled in on all Contracts.



- There is a batch under *Utilities* (Upper task bar in Energy Force) to populate the Departments when first turning this option on.
- The Department on the Contracts will be populated by the default product of the first tank attached to the Contract.
- A user right is required for the *Utilities* menu.
- After running the batch, a report will be generated in the CSV folder showing the Contracts populated and the Department used. Users will have the option to have the file automatically open when the program is finished.
- If there are existing Contracts that already have the product field filled in, the batch will not override the existing entry.
- 3. Upcharge Amounts will only apply to gallons pulled from a Contract. If the delivery exceeds the remaining gallons on the contract the upcharge will not apply to the gallon overage.
- 4. If the billed product and contracted product match no upcharge will apply.
- 5. If the delivered Product and contracted Product don't match but there is no corresponding entry in the XRef table to match the combination, no upcharge will apply.

Setup

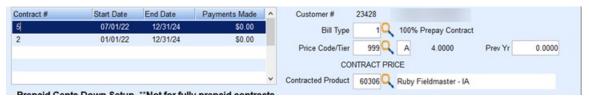
- 1. Upcharge Departments need to be set up under Supervisor Menu / Maintenance Menu / Maintenance Tables / Department. Departments need to be in Division 1 and the AFD division.
- 2. AFD Contract XRef table needs to be filled in. This is located on the Posting Menu / AFD Menu.



This table identifies the *Delivered Product* and the *Contracted Product*, the *Upcharge Amount* (per gallon) and *Upcharge Dept*. The *Upcharge Amount* will need to be updated manually prior to billing. The table can have multiple *Delivered Products* linked to the same contracted product.



Example: Here is a Contract with Contracted Product 60306.



In the Xref screenshot above, AFD *Delivered Product* 60312 with *Contracted Product* 60306 will be upcharged 0.30 per gallon.

The upcharge is shown in the AFD Pre-Billing Review screen and will automatically charge when the file is processed.

