

AFD with Product Level Contracts

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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.

Category	Setting Name	Actual Value
AFD	AFD Price Option	2

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

Category	Setting Name	Actual Value
AFD	AFD Price Option	2
AFD	Proc 1% Gross Disc	N
Contracts	ProductLevelContract	Y

- 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*.

AFD Menu

AFD Product XRef Daily	Review Detail
AFD Product XRef Monthly	Re-Process Detail
AFD Trip Charges	Pre-Billing Review
Import and Process Pre-Billing	Energy Force Tank Validation
Price Code Summary	AFD Price Options
AFD Maintenance	AFD Contract XRef

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.

Div	Delivered Product	Description	Contracted Product	Description	Upcharge Amount	UpCharge Dept	Description
10	20202	Unleaded - Premium - IA	20100	Unleaded - 10% Eth	0.2000	100	PREMIUM GAS UPCHARGE
10	60312	#1 Ruby Fieldmaster - IA	60306	Ruby Fieldmaster - IA	0.3000	101	#1 DD UPCHARGE
10	60316	#1 Clear - IA	60315	#2 Clear - IA	0.2500	102	#1 CD UPCHARGE

Example: Here is a Contract with *Contracted Product* 60306.

Contract #	Start Date	End Date	Payments Made	
5	07/01/22	12/31/24	\$0.00	
2	01/01/22	12/31/24	\$0.00	

Customer # 23428

Bill Type 100% Prepay Contract

Price Code/Tier 4.0000 Prev Yr

CONTRACT PRICE

Contracted Product Ruby Fieldmaster - IA

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.

Cust#	Contact Name	Tank Id	Tank Cap	Split Bill%	Dept	AFD Glns	Price	Price C...	Tier	Total Tax	Total Amount
23428		666	272.40		60312	230.00	0.0000	999	A	\$0.00	\$0.00
23428		666	272.40		60312	230.00	4.0000	999	A	\$0.00	\$920.00
23428		666	272.40		101	230.00	0.3000	605	A	\$0.00	\$69.00