Creating a Budget Proposal

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1. In the customer’s account, go to the **Service** tab.
2. Select **+ New Proposal**.
3. Click **Budget**.
4. Enter a title.
5. Select your company’s budget (for example, “12-Month Budget Plan”).
6. Select the template. If the template has budget levels, choose the level.
7. Choose the budget period.
8. Set the expiration date. The proposal can be signed through the end of that day in your company’s time zone.
9. Add any promotions, if applicable.
10. Add the forecast strategy. This sets how gallons are estimated for deliveries during the budget period. Set any fixed-gallon overrides here.
11. Select the fuels this budget covers.
12. Add downside protection, if applicable, and choose how the fee is collected:
    - **Budget:** drawn from the budget wallet over the plan term.
    - **Immediate:** charged right away to the plan’s autopay card. An immediate fee is not included in the payment estimate.
13. Review the service plans included in the budget. Every eligible service plan on the account is added, and its sales tax is included in the estimate.
14. Set the wallet carryover:
    - **Apply:** puts the customer’s leftover wallet balance toward the new plan. Use the slider (starting at 100%) to set how much carries over.
    - **Leave:** keeps the balance in the wallet. Use this when the money is set aside for the old term, a transfer, or a refund.
15. Select **Preview**.
16. Select **Finish**.

After creating the proposal

- **Finding a draft:** drafts appear on the Proposals card on the customer’s dashboard when the **Drafts** toggle is on. They are also listed under **Billing > Budget Plans > Budget Proposals**.
- **Editing:** the wallet carryover can be changed in the proposal editor until the proposal is signed. Changing it does not re-quote the proposal at today’s prices.
- **Projected balance:** unpaid balances from the prior budget year are not included in the projection. Credits from the prior year carry forward.

Customer signing

- Customers sign in the Customer Portal.
- Attaching an autopay card is optional. Without one, the first invoice posts to the account for manual payment, and a banner with a payment link stays on the proposal until that balance is paid.
- If a service plan on the proposal expired, was cancelled, or changed after the proposal was created, the signature fails and the customer is asked to contact you. Create a new proposal.

Creating Budget Proposals in Bulk

Use the batch wizard on the Budget Proposals screen. It runs in four steps:

1. **Parameters:** set the template, period, forecast strategy, fuels, downside protection (set per fuel), wallet carryover, and expiration date. When the template has budget levels, the lowest level is applied automatically.
2. **Preview:** choose which customers receive a proposal.
3. **Run:** proposals are created and sent in batches.
4. **Complete:** review the results.

Budget plan and budget proposal lists can be downloaded with **Export CSV**.

Activating a Budget and What It Covers

- A budget plan is a subscription with one of three statuses: **Pending**, **Active**, or **Pending Renewal**.
- The plan bills on its installment schedule. Each installment invoice is created by the nightly billing run.
- The **first installment date** controls when billing starts. If a new plan stays Pending with no invoice, check that date.
- Moving the first installment date changes the number of payments in the term. Review the payment amount after changing it.
- The budget wallet pays the invoice types the budget covers:
  - Fuel
  - Service plans linked to the budget
  - Downside protection invoices
- Some bills are only partly covered, such as a delivery past the plan’s gallon cap or a mixed service invoice. The budget pays its share, and the customer owes the rest.
- Statements show the amount the budget covered for the period.

Editing or Removing a Signed Budget or Prebuy Contract

- A signed budget cannot be deleted. To stop it, cancel the budget subscription, then create a new proposal if the customer needs a corrected plan.

- Draft and pending fuel contract proposals can be edited: price, volume, term, and fees. Select **Recalculate** to preview the new total before saving. Once a contract is signed, its terms are locked.
- After a budget is signed, its service plan coverage can still be linked, moved, or unlinked. See **Linking Service Plans to a Budget**.
- **Last Invoice Date** on a subscription sets where billing picks up for a plan brought over mid-term from another system.

Budget Invoices, the Budget Wallet, and Prompt Pay

Wallets

Customer money is held in three wallets: **Cash**, **Deposit**, and **Budget**. The budget wallet pays only the invoice types the budget covers.

Budget money is applied when one of these happens:

- An invoice is posted.
- A payment is retried.
- A receipt is reflowed.

Moving money into the budget wallet does not pay invoices that are already open. To apply it to an open invoice, reflow the payment or add a budget payment to the invoice.

Where to find budget money

Screen	What it shows
Overview, Account card	Cash wallet only
Billing tab	A Budget tile with the budget wallet balance
Ledger	All three wallets

Why a budget customer may see an amount due

- The monthly installment invoice is due.
- Part of a bill falls outside the budget, such as gallons past the cap or the uncovered part of a service invoice.
- The invoice is dated before the budget started.
- A replaced service plan has not been linked to the budget.
- An autopay charge was declined. A declined charge shows as due right away.

The customer’s **Due** tab hides invoices the budget covers. Installments and uncovered amounts still show.

Statements

Statements subtract wallet money from the balance owed and do not list budget-covered charges as due.

Prompt pay

- A budget customer’s wallet balance counts toward prompt-pay eligibility.
- A budget prompt-pay discount is applied when the invoice posts, and the discounted amount is paid from the budget wallet.
- A prompt-pay discount can be set to **Cash/Check only**, so payments made by card do not receive it.
- A discount removed by the office no longer appears in the Customer Portal or on the invoice PDF.

Budget Letters and Signup Emails

Edit the proposal email

1. Open **Proposals** settings.
2. Edit the subject and body for budget proposals. Quotes and fuel contracts have their own versions.
3. Use the live preview to check the customer name, portal link, and expiration date.
4. Available merge tokens include portal URL, expiration date, proposal type name, and title suffix.

Send budget proposals in bulk

1. Go to **Billing > Budget Plans > Budget Proposals**.
2. Select the accounts.
3. Choose the letter type.
4. Select **Send**.

Manage letter templates

- Budget letter templates are on the **Budget** tab under **Proposal Templates**.
- Use **Upload Template** to add a template, or **Download Default** to start from the standard version.
- Versions of the same template are grouped under one row.

If an email does not send

- The message names the problem, such as no default email on the customer or no support email on the brand.
- Addresses that bounce or report spam are blocked and tagged on the customer’s contact list.

Linking Service Plans to a Budget

When the proposal is created

A budget proposal includes every eligible service plan on the account. Each plan’s sales tax is included in the estimate.

When the budget is signed

The budget absorbs an existing service plan of the same template on the same unit instead of creating a duplicate.

When a covered service plan is replaced

The new plan is not linked to the budget automatically. Until it is linked, its charges bill the customer directly. To link it:

1. Open the budget’s detail dialog, or choose **Service plan coverage** on the budget row in the customer’s Subscriptions table.
2. Link, move, or unlink the coverage.
3. Review the preview of the change.
4. Select **Apply**. The change and the Ledger recalculation happen together.

This requires the ledger-adjustments permission and is recorded in the audit history.

A service plan template can be set to **Includes Tune-Up** so the plan counts as tune-up coverage.

Prebuy Contracts

Create offers in bulk

Use the bulk fuel contract proposal screen in the **Quotes** section of the Billing menu to create proposals for many customers at once. Contract templates are managed in **Proposals** settings.

Pricing options

Option	Choices
Price	Fixed price per gallon, or price protection with a market-price range, a protection fee, and a prepay option
Volume	A fixed number of gallons, or the customer’s prior-year gallons pulled automatically
Term	A fixed term or no end date
Fees and floors	May be set to $0. The enrollment fee field is required.

Customer acceptance

- Customers accept in the Customer Portal. The offer shows the fuel, term, volume, price, and prepay total.

- Attaching an autopay card is optional. Without one, the first invoice posts to the account for manual payment.
- A price protection offer that is not prepaid shows a **Due Now** amount.

Charging

- A prebuy creates an invoice for the prepaid amount.
- A contract accepted in the portal posts automatically. A contract accepted by staff in the office must be posted by staff.
- Downside protection is billed on its own invoice.
- On a partial-pay contract, the first invoice covers only non-fuel items, such as downside protection. Fuel is invoiced with each delivery.
- Before taking a manual payment on a contract invoice, check whether autopay will also collect it.

Deliveries against a prebuy

- When a delivery invoice posts, a **Fuel Contract Coverage** credit pays the fuel line at gallons × contract price, up to the prepaid amount remaining.
- A delivery larger than one contract is split across overlapping contracts.
- Sales tax on contract deliveries is not covered by the prepay. The customer owes the tax.
- The **Contract Obligations** report shows gallons committed, delivered, and still owed for each product. Gallons invoiced but not yet posted count as delivered.

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