



Resetting Year-to-date Units

05-18-21	:Date
152.6	:Qty
1127.7	:YTD

The Fuel Scheduling screen displays a number in the YTD field corresponding to the total number of gallons or litres delivered since the start of the year. Many dealers prefer to track this from the start of the heating season while others prefer to track from the start of their fiscal year or calendar year. There is no wrong way! It's simply one of several convenient ways for you to quickly spot-check how much fuel a customer has used so far within a

period. This YTD number is available as a selectable field in the Custom Reports module.

Once a year someone goes through the process outlined below of initiating a new period and resetting the accumulated units.

1. Open the Year End Processing screen by selecting "Utilities (F7)" / "Year End (F5)"
2. Select "Reset YTD Units" and click "Next"
3. This screen opens up showing the **Current** start date that you are accumulating from. You should change this date to the new start date, usually 12 months later.
4. Click "Next"
5. It may take a couple of minutes to complete processing all your accounts and resetting their YTD units.

Year End Processing

Year End Processing Wizard

Last Performed On / By

<input checked="" type="radio"/> Reset YTD Units	02-Sep-20	DF
<input type="radio"/> Reset Degree Days	02-Sep-20	RR
<input type="radio"/> Reset Inventory YTD Info	02-Jan-21	KP

Next Cancel

Year End Processing

Select the date from which to track YTD Gallons

Start Date: 9 / 1 / 2021

Click Next to update all your customers. This may take a couple of minutes to complete.

Next Back

* Note: if you later decide that you would prefer to see the YTD numbers tracked from a different start date, simply perform the Reset YTD step over again.