



Resetting Year-to-date Units

03-08-17	:Date
141.2	:Qty
1001.8	:YTD

The Fuel Scheduling record displays a number in the YTD field corresponding to the total number of gallons or liters that has been delivered since the start of the year. Many dealers consider this as the start of the heating season while others consider it as the start of their fiscal year or calendar year. There is no wrong or right way. It's simply a convenient way to quickly spot-check how much someone has used so far within a period. This YTD amount 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. Launch the Year End Processing screen by selecting "Utilities (F7)" / "Year End (F5)"
2. Select "Reset YTD Units" and click "Next"

	Last Performed On / By
<input checked="" type="radio"/> Reset YTD Units	01-Sep-16 KP
<input type="radio"/> Reset Degree Days	01-Sep-16 KP
<input type="radio"/> Reset Inventory YTD Info	01-Jan-17 KP
<input type="radio"/> Reset Contracts / Prices	01-Jul-17 DT

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.

Start Date: 9 / 1 / 2017

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