

Edit Budget Temp

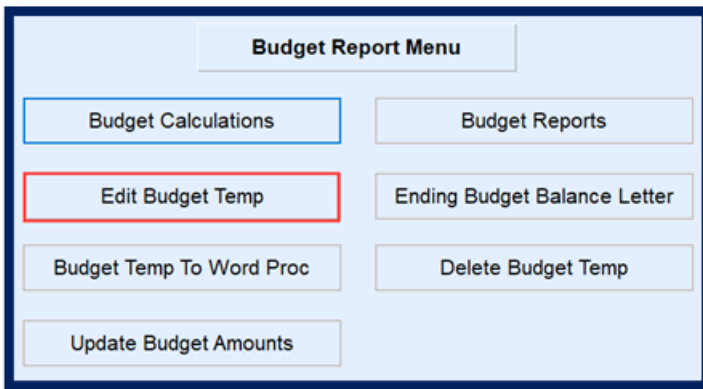
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Once budget calculations have been performed, the Edit Budget Temp program is ready for review and modification if necessary.

To preview the budget information in an Excel spreadsheet prior to updating the information within this program, see the [Budget Temp to Word](#) article.

Edit Budget Temp Screen

1. Select **Edit Budget Temp** on the *Budget Report Menu* screen.



2. Review the screen.

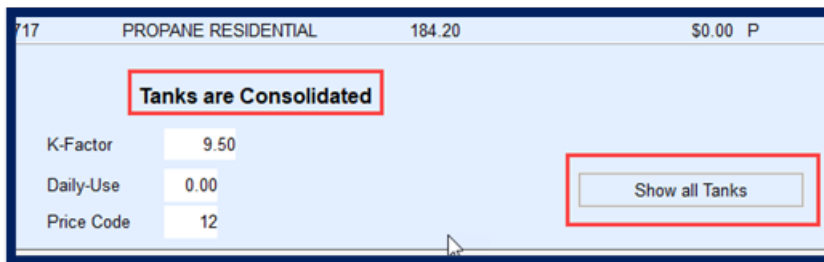
The screenshot displays a data table with the following columns: Div, Customer #, Name, Tank RRN/Serial, Product, Total Gallons, Curr Bu..., Total Balance, Type, and New Budget. Below the table are control fields for K-Factor, Daily-Use, and Price Code, along with "Consolidate Tanks" and "Cancel" buttons.

Div	Customer #	Name	Tank RRN/Serial	Product	Total Gallons	Curr Bu...	Total Balance	Type	New Budget
1	6295342		44,300	PROPANE RESIDENTIAL	1283.60	254.66	(2,086.76)	P	115
1	6371684		686,439	PROPANE RESIDENTIAL	1199.80	254.19	\$762.27	P	175
1	6785830		44,141	PROPANE RESIDENTIAL	1010.20	230.72	\$349.17	P	150
1	6785221		43,899	PROPANE RESIDENTIAL	1288.50	152.80	(1,280.00)	P	85
1	6295751		612,788	PROPANE RESIDENTIAL	1507.20	148.20	\$563.08	P	220
1	6656092		612,903	PROPANE RESIDENTIAL	1084.10	127.33	(21.18)	P	160
1	74997390		222,920	PROPANE RESIDENTIAL	1217.10	127.33	\$180.73	P	180
1	838148		281,335	PROPANE RESIDENTIAL	754.30	110.45	(528.52)	P	70
1	6785932		44,434	PROPANE RESIDENTIAL	1075.10	110.45	\$210.09	P	160
1	3615180		753,307	PROPANE RESIDENTIAL	283.60	97.27	(404.37)	P	10
1	6784137		281,078	PROPANE RESIDENTIAL	625.00	90.78	(156.11)	P	80
1	34229189		753,541	PROPANE RESIDENTIAL	424.00		\$0.00	P	65
1	6784756		228,480	PROPANE RESIDENTIAL	832.90	85.91	\$37.37	P	125
1	50143109		218,295	PROPANE RESIDENTIAL	776.00	85.91	(175.78)	P	100
1	27025579		44,305	PROPANE RESIDENTIAL	699.20	79.89	(130.30)	P	95
1	6295255		617,483	PROPANE RESIDENTIAL (AG E	447.90		(123.28)	P	55
1	36868502		281,173	PROPANE RESIDENTIAL	858.10	73.64	(562.08)	P	80
1	66422372		44,367	PROPANE RESIDENTIAL	426.30	61.36	(276.70)	P	40
1	6436463		709,369	PROPANE RESIDENTIAL	606.50	60.00	(375.76)	P	60
1	56664956		612,767	PROPANE RESIDENTIAL	200.00		\$0.00	P	30
1	1002008		44,297	PROPANE RESIDENTIAL	487.30	51.52	\$119.33	P	75
1	6785463		44,662	PROPANE RESIDENTIAL	474.60	36.82	\$110.31	P	70
1	70674022		220,950	PROPANE RESIDENTIAL	428.60	36.82	\$57.30	P	65
1	519049		44,626	PROPANE RESIDENTIAL	447.70		(75.78)	P	60

Control fields:
K-Factor: 4.35
Daily-Use: 0.00
Price Code: 12
Buttons: Consolidate Tanks, Cancel

- Customer number and tank information is displayed to reference if the customer account needs reviewed.
- Total gallons for the timeframes are listed along with the current budget payment if the customer already has one.
- The customer *Total Balance* is also listed. Only credit balances will have an effect on the New Budget payment amount if *Include Credit Balances* was selected when processing budget calculations.

- The *New Budget* amount is listed. This amount is based on the *number of Total Gallons * the price entered on the Budget Calculation screen*. It is then divided by the number of months entered to determine the payments.
 - All payments are rounded up in \$5 increments.
- 3. If a customer has more than one tank, the tanks are listed separately with a payment based for gallons sold or estimated for each tank. To have the payments consolidated into one payment for all tanks, select **Consolidate Tanks**.
- 4. If selected, the **Consolidate Tanks** button modifies to display **Show all Tanks**.



- 5. This button can be selected to return to the previous mode that displays all tanks.
- 6. Press **Ctrl+M** and modify new Budget Amounts as necessary.
 - If a budget needs removed, highlight the budget customer and press F3 and confirm to delete.
 - Don't forget! If utilizing the customer credit balance into the calculation and the customer has more than one tank with history, adjust the payment amount to reflect only one credit balance. The payment may need to be increased.
- 7. Press **Ctrl+Q** to save and **Esc** to exit the program once all changes have been made. Budget Payments are now ready to be applied to customer accounts, also known as Update Budget Amounts.

Year End Budget Clear

This procedure needs to be performed BEFORE processing the Update Budget Amount portion. The Year End Budget clear inactivates previous budgets and resets customer AR information. See the [Year End Budget Clear](#) article for details. Once completed, proceed to [Update Budget Amounts](#).