

Update Budget Amounts

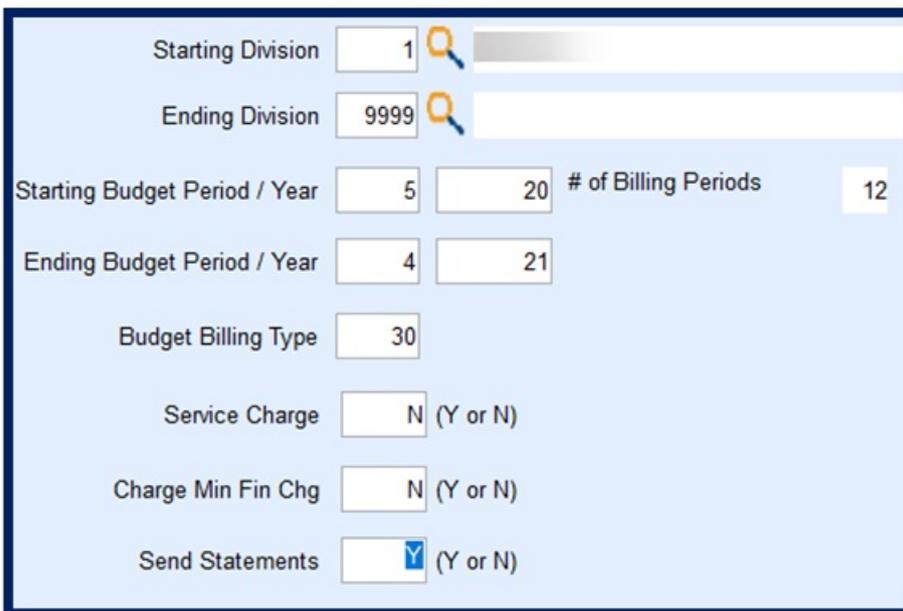
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The Update Budget Amounts program performs a mass update to *Budget* tabs located on the *Customer Maintenance* screen to reflect the newly calculated budget payments. The settings made in this program will automatically apply to all accounts within the Budget Temp screen, and therefore, imperative that they be accurate prior to performing this function.

1. Select **Update Budget Amounts** on the *Budget Report Menu* screen.



2. Enter *Starting* and *Ending Division* numbers.



3. Enter the *Starting Budget Period* month digit and the last two digits of the starting *Year*.
4. Enter the *Ending Budget Period* month digit and the last two digits of the ending *Year*. The *# of Billing Periods* will display. Check for accuracy.
5. Enter the *Budget Billing Type* code.
 - o This number is needed before accessing this program as there is no lookup feature for this field. Reference the *Bill Type Maintenance* screen to determine the proper code.
6. Enter Y or N to apply *Service Charges* to customer accounts during the budget billing time period.
 - o This is typically set to N.
7. Enter Y or N to *Charge Min Fin Chg*.

- This is typically set to *N*.
8. Enter *Y* or *N* to *Send Statements* to this customer during the budget billing time period.
 9. Select **Process** then select the **Green Checkmark** to confirm updating budget customers with entered values.
 10. The program will run and return to the *Budget Report Menu* screen.
 11. Navigate to the *Customer Maintenance* screen to verify the *Budget* tabs updated properly and that the *Service Charges*, *Minimum Finance Charges*, and *Statement* fields have updated properly.

The image shows a screenshot of a software interface for customer maintenance. The form is titled 'Customer Maintenance' and contains several fields for budget-related information. The fields are as follows:

Active/Inactive	A
Budget Payment	120.00
Beginning Period/Year	5 2020
Ending Period/Year	4 2021
ECommerce Budget Day	
# of Billing Periods	12
Billing Type Code	30 Budget
# Times Billed	0
# Payments Made	0
Prior Year Budget	150.00
Prior Year Balance	\$0.00