

# How Budgets are Updated Once Applied to a Customer

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## Number of Times Billed

This information gets updated when monthly budget statements are processed in Energy Force. The system is designed to increment the number of times billed after statements are generated when **Update Statements** is selected.

The screenshot shows a software interface for processing statements. At the top, it says "Complete form and Change to Query Mode to Process". Below this, there are fields for "Create Date", "Create Time", "Created By", "Description", "File Name", and "Stmnt Proces". The "Description" field contains "April 2021 Statements".

Under "Division", there is a dropdown menu showing "1 ABC PROPANE COMPANY". Below this, there are three radio buttons: "All" (selected), "Statement", and "Budget".

There are several checkboxes for processing options: "Process Credit Balances", "Process Budget Credit Balances", "Process Pay Arr. Credit Balances", "Process Current Balances", and "Process Idle Credit Accounts", all set to "Yes".

There are also fields for "Show Meter Price As", "Print Gallons On Meters", "Statement \$ Limit", and "Meter Statement \$ Limit", all set to "Gals" and "Yes" respectively, with dollar limits of "\$0.00".

On the right side, there are several buttons: "Process Statement Data", "View/Edit Aging Messages", "View Customers", "View History", "Print Statements", "Update Statements" (highlighted with a red box), "Delete Statement File", and "Electronic Bill".

At the bottom, there are fields for "Budget Due On", "Last Processed", and "Budget Last Processed". The "Budget Due On" field shows "04/15/21".

When processing monthly statements, *All* or *Budget* will need to be chosen in order for budgets to process.

## Number of Payments Made

The screenshot shows a payment entry form. At the top, there are fields for "Div / Cust#" showing "1 100007 ADAMS ANSEL".

Below this, there are fields for "Transaction" (set to "24 Payments - Budge"), "Department" (set to "128 PAYMENT - CHECK"), and "Amount" (set to "\$120.00").

On the right side, there are fields for "Budget#" (set to "12"), "Check #" (set to "0"), "Reference" (set to "PAYMENT - CHECK"), "Group / Discounts", "Group", "Collections?" (set to "No"), and "Terms" (set to "COD").

At the bottom, there is a summary section with the following data:

Total Balance	\$500.00
Budget Payment Amount	120.00
Last Pymt Date and Amount	03/23/18 \$700.00

This value is updated when a payment is made in Energy Force using transaction code 24 for budgets. The system is designed to automatically increment the number of payments based on the dollar value entered.

For example, if the Budget payment is \$100 and the customer pays \$100, the system will increment by one. If the customer pays \$200, the number of payments made will update by two payments.

**Note:** The payment must be for the minimum value, double, triple, etc. in order for the amounts to increment. If the customer paid \$150, the payment will only update by one payment.