Manual Process to Add a Budget to a Customer Account

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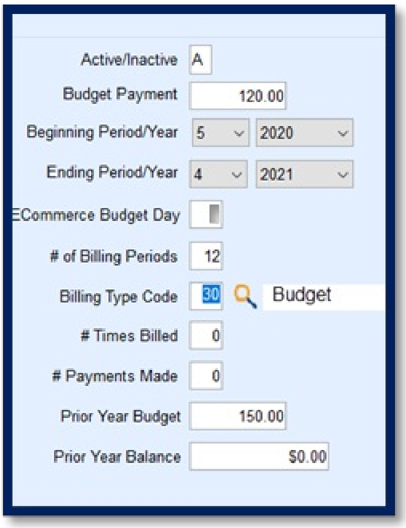
There are times a budget payment will need to be manually added to a customer account such as when an existing customer requests a budget payment after the automated processes have been completed or there is a new customer account. The following steps outline how to manually add a budget to a single customer account.

1. Navigate to *Main Menu / Customer Menu / Customer Maintenance*.
2. Highlight the customer account and select the *Budget* tab.
3. Enter *A* for active.



4. Enter the *Budget Payment* amount.
5. Enter the *Beginning Period* month and year.
    - If the budget season is already active, enter the month this particular customer will begin budget payments.
6. Enter the *Ending Period* month and year.
7. If utilizing the Energy Force Ecommerce Program and the customer has requested a specific day of month for their budget payment to process, enter the day of the month in the *ECommerce Budget Day* field. Otherwise, proceed to the next step.
8. The system will automatically calculate the *# of Billing Periods* based on steps 5 and 6.
9. Select the *Bill Type Code*.
10. *# of Times Billed* and *# of Payments Made* will typically be left blank upon creation.
    - If the billing process has already been completed and payment received prior to the setup of this budget, enter the information accordingly.
11. *Prior Year Budget* payment and *Prior Year Balance* will be left blank at this time.
12. Press **Ctrl+Q** to save the budget to the customer account.