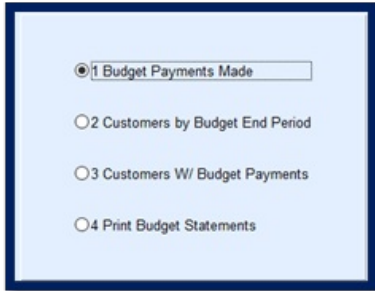


Budget Reports

Last Modified on 05/11/2022 3:33 pm EDT

There are four Budget Reports available within the *Budget Report Menu*.



Budget Payments Made

This report displays current budget customers and can be processed by *Bill Type* or by *Statement Cycle Code*. The report is designed to display the budget payment amount, current AR balance, number of times the customer has been billed and the number of times the customer has made a payment. It is a quick and easy way to determine if an account is past due on payments. In this example, Michael Brock is behind 2 payments.

04/08/21 16:18		Energy-Track				Page 1	
Number of Budget Payments Made							
Division		1 ABC PROPANE COMPANY		to 9999			
		Bill Type	0	Cycle Code	1		
Div	Customer #	Customer Name	Budget Amt	A/R Balance	# of Times Billed	# of Pymnts Made	Cycle
1	100007	ADAMS,ANSEL	120.00	\$18,537.29	2	1	1
1	10088	BILLINGSLY,PETER	1015.00	\$7,472.96	2	1	1
1	100005	BROCK,MICHAEL	170.00	\$1,156.75	2	0	1

Customers by Budget End Period

This report displays customers that have a budget ending in the month and 4-digit year that is entered in the parameter fields. Use this report to review budgets that are expiring soon or may be past due by number of payments made.

04/08/21 16:24		Energy-Track				Page 1	
Customers by Month Budget Ends							
Division		1 ABC PROPANE COMPANY		to 9999			
		Budget End Period	3	Budget End Year	2022	Bill Type	0
Div	Customer #	Customer Name	Budget Amt	Balance	# of Times Billed	# of Pymnts Made	
Budget A/I		Begin Period / Year	End Period / Year				
1	100007	ADAMS,ANSEL	120.00	\$18,537.29			
	A	4 2021		3 2022	12		11

Customers with Budget Payments

A list of all customers with active budget payments and the *Type* of budget is displayed.

Customers With Budget Payments			
Division 1		ABC PROPANE COMPANY	
Customer #	Customer Name	Payment Amount	Type
100007	ADAMS,ANSEL	120.00	BUDGET
10088	BILLINGSLY,PETER	1015.00	BUDGET
100005	BROCK,MICHAEL	170.00	BUDGET

Print Budget Statements

Use this report to send a simple statement to customers indicating their budget payment is due. Keep in mind that this does not update the # of times billed. Budgets will need processed using the monthly statement program in the *Month-End Menu* to update the times billed.

ABC PROPANE COMPANY 5250 US HWY 36 SUITE 100 AVON, IN 46123 (317)745-6560 Fax (317)250-1234					
ADAMS,ANSEL 123 PRODUCTION DRIVE BROWNSBURG, IN 46112	<table border="1" style="margin-left: auto; margin-right: auto;"> <tr> <td>Invoice Date</td> <td>Customer #</td> </tr> <tr> <td>04/08/21</td> <td>100007</td> </tr> </table> <p>Budget Amount Due</p> <p>120.00</p>	Invoice Date	Customer #	04/08/21	100007
Invoice Date	Customer #				
04/08/21	100007				
<p>Your monthly budget payment is \$ 120.00</p> <p>Payment is due by 04/30/2021</p>					