

Payment Arrangements

Last Modified on 11/01/2023 9:00 am EDT

Use this feature to create a payment arrangement that will be visible on the *Customer Maintenance* screen as well as the *Payment Posting* screen.

1. From the Main Menu, select **Customer** then **Customer Maintenance**.
2. Choose the customer and select **Payment Arrangement**.

Safety Info Received Date	00/00/00		
BUDGET			
Start Date	04/01/14	End Date	07/31/14
Monthly Payment Amt	\$1,337.82	Active	
Must pay in full by the end of July or will not be eligible for 2015 budget.			

- Payment Arrangement
- Tickler Information
- Meter/RTM Information
- Print Information
- Print Label
- Work Orders

3. *Active* is the default.
4. Enter a *Billing Type*.
5. Enter *Start* and *End Dates*.
6. Based on the starting date, ending date, and Figured On amount, Energy Force will calculate the *Monthly Payment Amount*. This amount can be edited if necessary.
7. Enter *Comments* and select **Save**.
8. The payment amount will now appear on the *Customer Maintenance* screen.

Notes:

- *Payment Arrangements* is a feature used to indicate the amount the customer should pay. However, it does not track the amount pending nor does it police what is entered as payment on the *Posting* screen.
- The *Payment Arrangement* option will become *Inactive* once it has reached the *End Date*. If the customer pays off the balance before the ending date is reached, the arrangement will need to be inactivated manually.