

Step-by-Step Procedure

Budget Billing Campaign Letter

Campaign letters are a means to inform customers about the budget billing option. It provided information regarding the estimated budget bill amount as well as sign-up instructions.

Review the Campaign letter. Note any changes to wording, dates, and token fields needed. Submit a WSC ticket for assistance in making the changes to the letter.

Note: Recommended practice – create all letters using the Mail Merge process.

From the **Payment Plan Calculator**, create a batch containing all accounts.

Click **Add**.

Enter a **Batch ID** name.

The **Entry Defaults** tab will auto-populate based on the setups from the Control Table settings and the Program Key Value (PKV) setting.

On PAP select 'N', 'Y', or leave blank.

Click **OK**.

Journals > Standard > Payment Plan Calculator

Payment Plan Calculator (BROWSE)

Batch More

Batch I.D.: Budget Test 1 Batch Number: 8 Created By: aenfelt

Entry Defaults Auto-Load Entry Variance Report Verification Listing Letter Print Post

On PAP: [v]
of Payments: 12 Balance Refund High: 99999.00
Initial Payment Factor: 1.00 Balance Refund Low: -99999.00

Payment Plan Calculator Details (BROWSE)

Service	Service Description	Plan Type	Plan Type Descript...	Frequency	Frequency Descrip...	Day	Payment	Payment Description
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Select the **Auto-Load** tab.

Click **Edit** in the lower right corner.

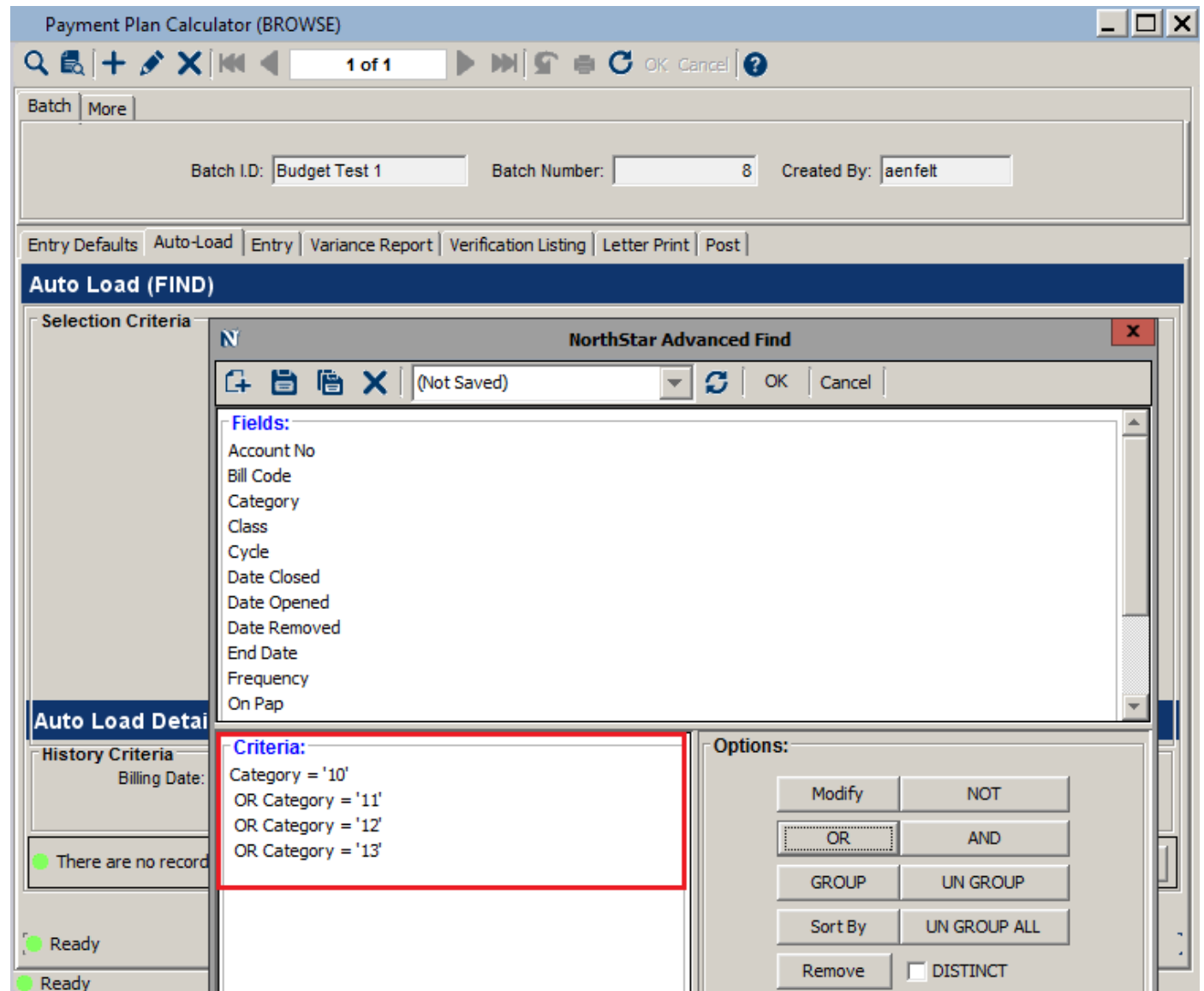
Create an **Advanced Find** for all active residential customers.

Note: Typically, utilities use an open search for all active residential customers when initiating budget billing campaigns.

The utility in this example only has four (4) Residential Category Codes.

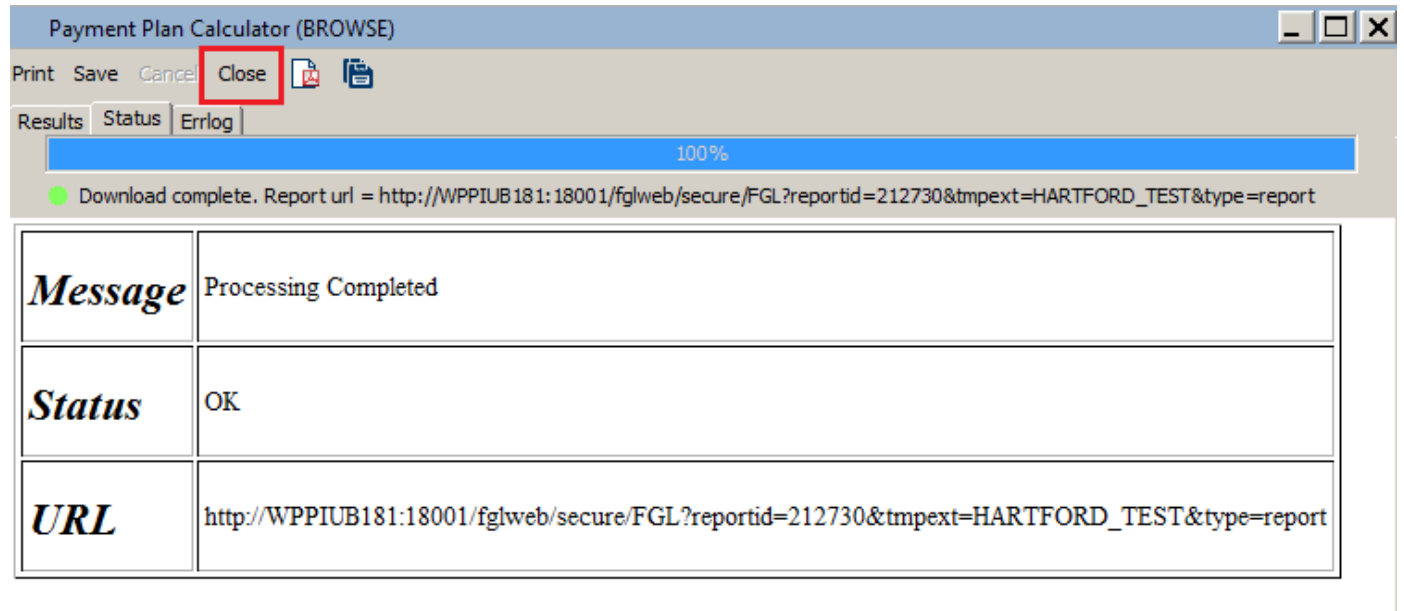
Click **OK** to activate the advanced find.

Click **OK** to initiate the report process.



The processing screen appears.

Click **Close** when the processing completes. This will return the Payment Plan Calculator to view.



Move to the **Letter Print** tab. This has two (2) additional tabs: Letter Create and Print.

From the **Letter Create** tab:

Click the **Edit** button in the lower right corner.

At the **Letter** dropdown, select the budget letter for the campaign.

Click **OK**.

Payment Plan Calculator (BROWSE)

Batch I.D.: Budget Test 1 Batch Number: 8 Created By: aenfelt

Letter Create

Generate Letters (FIND)

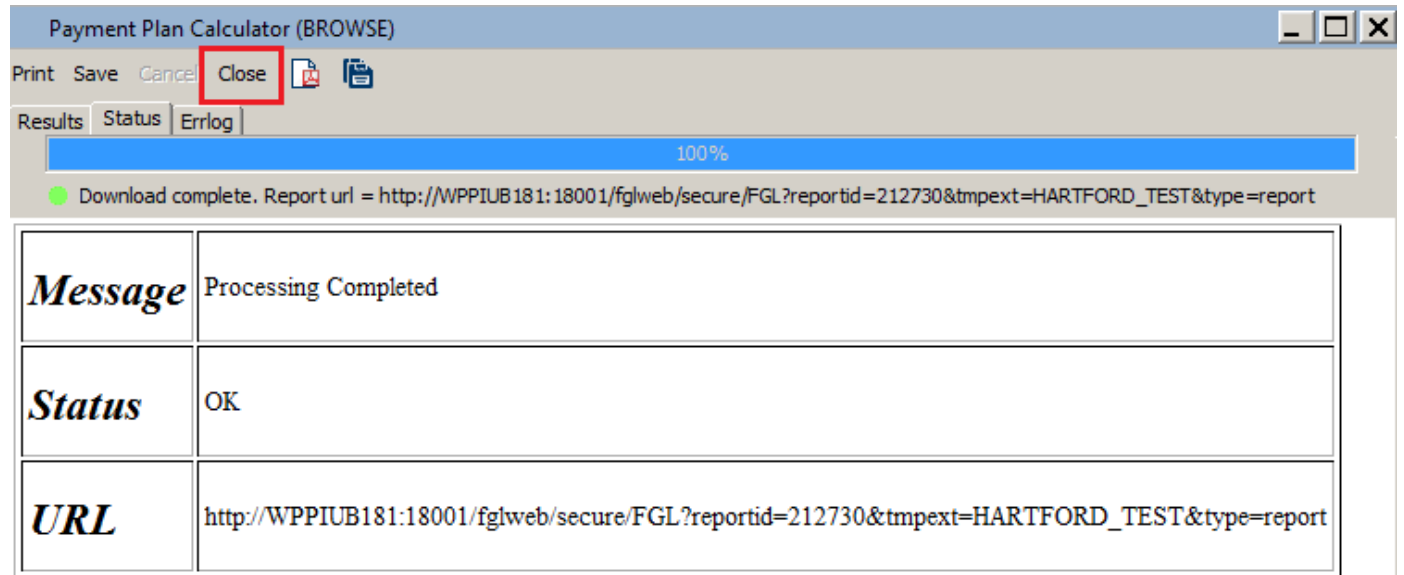
Selection Criteria

On PAP: [dropdown]
Payment Plan: [dropdown]
Letter: 30 [dropdown]

OK Cancel

The processing screen appears.

Click **Close** when the processing completes. This will return the Payment Plan Calculator to view.



Select the **Print** tab.

Click **Edit** at the bottom of the screen.

Select the same **Letter Number** used in the Letter Create process.

At **Order by**, select the preferred printing order.

Click **OK** to execute the letter print process.

The screenshot shows the 'Payment Plan Calculator (BROWSE)' application window. The window title bar includes standard OS controls and a search icon. Below the title bar is a toolbar with icons for search, edit, delete, and navigation, along with a '1 of 1' indicator and 'OK' and 'Cancel' buttons. The main area of the window is divided into several sections. At the top, there are tabs for 'Batch' and 'More'. Below these, there are input fields for 'Batch I.D.: Budget Test 1', 'Batch Number: 8', and 'Created By: aenfelt'. A second set of tabs includes 'Entry Defaults', 'Auto-Load', 'Entry', 'Variance Report', 'Verification Listing', 'Letter Print', and 'Post'. The 'Letter Print' tab is selected, and a sub-tab 'Print' is highlighted with a red box. Below the tabs, a dark blue header reads 'Letter Print (FIND)'. The main content area is mostly empty, with a red rectangular box highlighting a 'Letter Number: 30' dropdown menu and an 'Order By: 1' dropdown menu. At the bottom of the window, there are 'OK', 'Cancel', and 'Edit' buttons.

Print and mail the Campaign Letters.

Budget Billing Program

Note: *This is the actual letter mailed to customers after they have registered for Budget Billing. Campaign letters will vary by utility.*

Customer Name
Mailing Address
Mailing Address City Stat Zip

You have successfully enrolled in the Budget Billing Program. Your calculated budget billing amount will be **\$201.00** at service address **Service Address**. Your monthly budget amount is based on the average of your actual bill charges during the previous 12 months. We will continue to read your meter every month and your utility bill will show how much energy you used, the actual bill amount, and the balance on your account. Please continue to review your bill monthly, for bill messages that will provide additional important notifications in regards to the Budget Billing Program and other City announcements.

We will review all budget accounts every 6 months. In March, each year, your monthly budget amount due may change if the recalculated budget changes by 10 percent or more. Any settlement balance will be included in the average of your next 6 months' budget bill amount. Then in September, each year, we will process a final budget review and reconcile your account. Any outstanding charges will be owed at that time, while any credits under \$150.00 will be applied to your next month's billing. A refund check will be issued for all credits over \$100.00 and mailed to you. At that time, we will also calculate a new budget billing for the following year based off of your actual usage for the last 12 months.

Please remember being enrolled in Automatic Payment Plan (ACH) is a requirement to be enrolled in the Budget Billing Program. Your monthly Budget amount will be automatically paid each month on the 20th from the checking or savings account you provided us when you enrolled. If you have any questions, please feel free to contact us at the Utilities at 555-555-5555.

Sincerely,

Delete the batch after the letters are printed.

The purpose of this batch is for the creation of the budget billing campaign letters.

A new batch will be created when customers sign-up for the budget billing option.

