



12 A budget manager's guide to creating an individual account

A local authority organisation will normally set up an individual on Budget Manager and then assign a budget manager to them. The budget manager will then create an account for the individual.

Creating an individual account

If your organisation has multiple roles within Budget Manager, then you must ensure that you have selected the budget manager role. You can check this in the welcome information box at the top of your screen, as shown below.



Fig. 1 Changing Roles

There are three main roles that can be selected. To make it easy for you to identify the right one for you, these have been colour coded as follows:

| | |
|------------------------------|----------|
| Budget manager role | – orange |
| Local authority role | – red |
| Service provider role | – blue |

To change your role, click on the Change button.

Now go to the Individuals tab on the bottom left navigation panel. Click on the Create Account button



Create Acc to start the Account Creation Wizard.

Using the Account Creation Wizard

Wizard Step 1 - Select Individual

Select an individual from the drop down list. If only one individual is available they will be selected automatically. A message will be displayed if no individuals are available.

Wizard Step 2 - Personal Details

Here, you can input an individual's personal details, contact details and upload an image and contact details, as shown below. Any fields marked with an asterisk are mandatory.

To add a contact, click on the Add Contact button, as shown below.

☑ Contact details

| | Action | ☑ Contact type | ☑ Contact details | ☑ Format |
|---|--------|----------------|-------------------|---------------|
| ☑ | ✗ | Mobile | 0714 251 1458 | 0712 312 3456 |

Add contact

Wizard Step 3 - Further Personal Details

At this step, shown below, you can record additional personal information such as date of birth, ethnic group, marital status, gender and disability. This information is hidden on the Personal Budget Account unless it is specifically requested by specific individuals with appropriate permissions.

| Action | Reference type | Reference details | Format |
|--------|----------------|-------------------|--------------------|
| ✗ | Email | email@vw.com | username@gmail.com |

Add reference

Fig. 4 Further Personal Details

References such as an email address or any specifically created reference type can also be added.

Wizard Step 4 - Catalogue

This step allows you to establish which catalogues an individual will have access to. To select the required catalogues go to the drop down menu on the top left hand of the screen and select Buyer Catalogue Group (BCG).

Here, you can also add the catalogue to the individual's favourite view.

| | Add to favourites | Action | Service provider name | Address | Catalogues | Supplier of | Accreditation |
|-------------------------------------|-------------------------------------|--------|-------------------------|---|------------------|----------------|---------------|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | Supplier organisation | 15 Tanhouse Avenue, Birmingham, Staffordshire, B43 5AA | Public catalogue | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | Buyer1 organisation | 13 Tanhouse Avenue, Birmingham, Staffordshire, B43 5AA | Public catalogue | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | Supplier organisation 2 | 11 Tanhouse Avenue, Birmingham, Staffordshire, B43 5AA | Public catalogue | | |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | Rob the Supplier | 1 Birkrig, Skelmersdale, Lancashire, WN8 9HL | Public catalogue | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | LA BM SP VW | Unit 1 Enfield Industrial Estate Enfield Street, Wigan, WN5 8DB | Public catalogue | Fairground Tat | |
| <input type="checkbox"/> | <input type="checkbox"/> | | SP Only | 7 Eavesdale, Skelmersdale, Lancashire, WN8 6AU | Public catalogue | | |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | AA Associates Ltd. | 1 Smithy Court, Wigan, WN3 6PS | Public catalogue | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | Thera - East Anglia | The West House Alpha Court Swingbridge Road, Grantham, Lincolnshire, NG31 7XT | Public catalogue | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | 1111111111111 | 1 Eastfields Road, London, Middlesex, W3 0AA | Public catalogue | | |

Fig. 5 Adding catalogues

Wizard Step 5 - Support Team

This step allows you to add an individual to a support team.

If you select the 'add an individual to a support team' option the Wizard will guide you through the process.



Select organisation type:

Please input the name of organisation:

Selected organisation: Lancs County Council

Please select required user from the list below or create new one using Create button:

 Create

| | Name | Address |
|----------------------------------|-----------------------|--|
| <input checked="" type="radio"/> | Ima LA Org User | 1 Cambridge Close Preston Lancashire PR1 7PR |
| <input type="radio"/> | Justin Time | Apartment 4 Wharfside Heritage Way Wigan WN3 4AT |
| <input type="radio"/> | Anne Other Individual | |

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Fig. 6 Add a Support Member