How to Add Customer Budget Schedule

Customer Budget is a simple process to require a budgeted payment each month, regardless of the actual activity level. Below are the steps in setting up a customer budget.

- 1. Open the customer record. Navigate to Customer tab | Misc tab.
- 2. Fill out the budget related fields.
 - a. Budget Begin Date. Enter the starting date of the new budget schedule to be generated. You can click on the mini-calendar button and select the date, or manually type the date.
 - b. Monthly Budget. Enter the default monthly amount of budget.
 - c. No of Periods. Enter the number of periods the budget will be generated.

Entity General Cus	tomer Split	Farm	Locations	Contacts	Comment	s (0) Hi
Detail Misc Pricing	g Taxing (Grain /	Agrimine F	atronage	Applicator	Help De
Credit Details						
Credit Limit:						100,000.
AR Balance:						383.
Credit Stop Days:						
Credit Code:						
Active:						
PO Required:						
Credit Hold:						
Budget Details						
Budget Begin Date:	1/10/2016					
Monthly Budget:						1,000.
No of Periods:						
	Budget Sci	a a du la				

3. Click the Budget Schedule button. This will generate the budget based on above details.

ntity General Customer Split Farm Locations	s Contacts Commen	ts (0) History	Customer Budget		^ □
	Patronage Applicator	Help Desk	Save Undo Close		
Credit Details	/		× Remove III Layout C	Filter Records (F3)	
Credit Limit:	/	100,000.00	Budget Date	Budget Amount	Is Used
AR Balance:	/	383.68	6/10/2016	1000	
Credit Stop Days:	/	0	5/10/2016	1000	
Credit Code:	/	~	4/10/2016	1000	
Active:	/		3/10/2016	1000	
PO Required:	/		2/10/2016	1000	
Credit Hold:			1/10/2016	1000	
Budget Details				0	
Budget Begin Date: 1/10/2016	_/				
Monthly Budget:		1,000.00			
No of Periods:		6			
Budget Schedule					
Tie Budget to Customer Aging:					

- 4. Save the Customer Budget.
- 1. Open the customer record. Navigate to Customer tab | Misc tab.
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- c. No of Periods. Enter the number of periods the budget will be generated.

Entity - ABC Reseller							
New Save Search Re	fresh Delet	te Undo	Addition	al - Close			
Entity Customer Sp	lit Farm	Locations	Conta	cts Comme	ents (0) H	History	Attac
Detail Misc Pricing	Taxing	Grain A	grimine	Patronage	Applicate	or Hel	p Desk
Credit Details							
Credit Limit:						0	0.00
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Budget Begin Date:	01/10/2010	5					
Monthly Budget:						1,000	0.00
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	Budget S	chedule					

3. Click the Budget Schedule button. This will generate the budget based on above details.

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etail Misc Pricin	g Taxing	Grain Ag	grimine Pa	tronage	Applicator	Help De	s Save Und	o Close						
Credit Details										0	D 1 (52)			
Credit Limit:						0.00		× Remove	🗄 Layout	Q, HI	ter Records (F3) Budget Amount			
AR Balance:					/	0.00	Budge							
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				/		Ŷ	03/10/	2016			1000			
Active:	\checkmark						04/10/	2016			1000			
PO Required:							05/10/	2016			1000			
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4. Save the Customer Budget.

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	Entity	Cust	omer	Split	Farm	Loc	ations	s Conta	acts	Comme	ents (0)	Hist	ory	Atta
	Detail	Mis	c Pri	cing	Taxing	Grai	n	Agrimine	Pa	tronage	Applic	tator	He	p Des
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١١	Budget	t Begir	n Date:			01	/10/2	016						
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	Apply F	Prepai	d Taxes	5:										
	Apply S	Sales T	ax:											

3. Click the **Budget Schedule** button. This will generate the budget based on above details.

ntity Customer Split Fan	m Locations Contacts Comments (0) History	~ 🗆
Detail Misc Pricing Taxin	g Grain Agrimine Patronage Applicator Help Des Save Undo Close	
tatement Detail:	+ Insert × Remove ⊞ Layout Q Filter Records (I	3)
tatement Format:	✓ Budget Date Budget Am	unt
redit Stop Days:	0 01/10/2016 1000	
ervice Charge:	01 02/10/2016 1000	
-	03/10/2016 1000	
udget Begin Date:	04/10/2016	
Nonthly Budget:	1,000.00 05/10/2016 1000	
lo of Periods:	6 06/10/2016 1000	
	Budget Schedule 0	
pply Prepaid Taxes:		
pply Sales Tax:		
ipply bales tax.		
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4. **Save** the Customer Budget.