

# 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 - ABC Reseller**

New Save Search Refresh Delete Undo Additional Close

Entity General **Customer** Split Farm Locations Contacts Comments (0) History

Detail **Misc** Pricing Taxing Grain Agrimine Patronage Applicator Help Desk

**Credit Details**

Credit Limit: 100,000.00

AR Balance: 383.68

Credit Stop Days: 0

Credit Code: ▼

Active: ☐

PO Required: ☐

Credit Hold: ☐

**Budget Details**

Budget Begin Date: 1/10/2016

Monthly Budget: 1,000.00

No of Periods: 6

Budget Schedule

Tie Budget to Customer Aging: ☐

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

**Entity - ABC Reseller**

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Budget Schedule

Tie Budget to Customer Aging: ☐

**Customer Budget**

Save Undo Close

Remove Layout Filter Records (F3)

Budget Date	Budget Amount	Is Used
6/10/2016	1000	<input type="checkbox"/>
5/10/2016	1000	<input type="checkbox"/>
4/10/2016	1000	<input type="checkbox"/>
3/10/2016	1000	<input type="checkbox"/>
2/10/2016	1000	<input type="checkbox"/>
1/10/2016	1000	<input type="checkbox"/>
0		<input type="checkbox"/>

4. **Save** the Customer Budget.

1. Open the customer record. Navigate to **Customer tab | Misc tab**.

2. Fill out the budget related fields.

- 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.
- Monthly Budget.** Enter the default monthly amount of budget.
- No of Periods.** Enter the number of periods the budget will be generated.

Entity - ABC Reseller

New Save Search Refresh Delete Undo Additional ▾ Close

Entity Customer Split Farm Locations Contacts Comments (0) History Attach

Detail Misc Pricing Taxing Grain Agrimine Patronage Applicator Help Desk

**Credit Details**

Credit Limit: 0.00

AR Balance: 0.00

Credit Stop Days: 0

Credit Code: ▾

Active: ☒

PO Required: ☐

Credit Hold: ☐

**Budget Details**

Budget Begin Date: 01/10/2016

Monthly Budget: 1,000.00

No of Periods: 6

Budget Schedule

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

Entity - ABC Reseller

New Save Search Refresh Delete Undo Additional ▾ Close

Entity Customer Split Farm Locations Contacts Comments (0) History Attach

Detail Misc Pricing Taxing Grain Agrimine Patronage Applicator Help Desk

**Credit Details**

Credit Limit: 0.00

AR Balance: 0.00

Credit Stop Days: 0

Credit Code: ▾

Active: ☒

PO Required: ☐

Credit Hold: ☐

**Budget Details**

Budget Begin Date: 01/10/2016

Monthly Budget: 1,000.00

No of Periods: 6

Budget Schedule

**Customer Budget**

Save Undo Close

+ Insert ✕ Remove ⌘ Layout 🔍 Filter Records (F3)

Budget Date	Budget Amount
<input type="checkbox"/> 01/10/2016	1000
<input type="checkbox"/> 02/10/2016	1000
<input type="checkbox"/> 03/10/2016	1000
<input type="checkbox"/> 04/10/2016	1000
<input type="checkbox"/> 05/10/2016	1000
<input type="checkbox"/> 06/10/2016	1000
<input type="checkbox"/>	0

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Entity - ABC Reseller

New Save Search Refresh Delete Undo Additional ▾ Close

Entity **Customer** Split Farm Locations Contacts Comments (0) History Attachments

Detail **Misc** Pricing Taxing Grain Agrimine Patronage Applicator Help Desk

Statement Detail: ☐

Statement Format:

Credit Stop Days:

Service Charge:

**Budget Begin Date:**

**Monthly Budget:**

**No of Periods:**

Apply Prepaid Taxes: ☐

Apply Sales Tax: ☐

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

Entity - ABC Reseller

New Save Search Refresh Delete Undo Additional ▾ Close

Entity **Customer** Split Farm Locations Contacts Comments (0) History Attachments

Detail **Misc** Pricing Taxing Grain Agrimine Patronage Applicator Help Desk

Statement Detail: ☐

Statement Format:

Credit Stop Days:

Service Charge:

**Budget Begin Date:**

**Monthly Budget:**

**No of Periods:**

Apply Prepaid Taxes: ☐

Apply Sales Tax: ☐

**Customer Budget**

Save Undo Close

+ Insert X Remove ⌘ Layout 🔍 Filter Records (F3)

Budget Date	Budget Amount
<input type="checkbox"/> 01/10/2016	1000
<input type="checkbox"/> 02/10/2016	1000
<input type="checkbox"/> 03/10/2016	1000
<input type="checkbox"/> 04/10/2016	1000
<input type="checkbox"/> 05/10/2016	1000
<input type="checkbox"/> 06/10/2016	1000
<input type="checkbox"/>	0

Edited

4. **Save** the Customer Budget.