

How to Edit or Delete Customer Budget

Open Customer Budget

1. Open the customer record. Navigate to **Customer tab | Misc tab**.
2. Click the **Budget Schedule button** to open the Customer Budget screen.

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 L

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: ☐

Edit Customer Budget

1. Open the Customer Budget screen.
2. Make the necessary change on Budget Date or Budget Amount. Note that you cannot edit a budget schedule when its date is in the past.
3. **Save** the changes.

Delete Customer Budget

1. Open the Customer Budget screen.
2. Select the schedules to be deleted.

3. Click **Remove** button.

Customer Budget ^ □ ×

Save Undo Close

☒ Remove ☐ Layout

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

4. Click **Yes** on the confirmation message.



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You are about to delete 2 rows.
Are you sure you want to continue?

Yes

No

Note that budget date cannot be deleted if a payment was already made against it.

5. **Save** the changes.

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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:

AR Balance:

Credit Stop Days:

Credit Code: ▾

Active: ☒

PO Required: ☐

Credit Hold: ☐

Budget Details

Budget Begin Date:

Monthly Budget:

No of Periods:

Budget Schedule

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Customer Budget

Save Undo Close

+ Insert **✕ Remove** Layout Filter Records (F3)

<input type="checkbox"/>	Budget Date	Budget Amount
<input checked="" type="checkbox"/>	01/10/2016	1000
<input checked="" 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

4. Click **Yes** on the confirmation message.



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Yes

No

5. **Save** the changes.

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

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

Statement Detail: ☐

Statement Format: ▾

Credit Stop Days: 0

Service Charge: 01 ▾

Budget Begin Date: 01/10/2016

Monthly Budget: 1,000.00

No of Periods: 6

Budget Schedule

Apply Prepaid Taxes: ☐

Apply Sales Tax: ☐