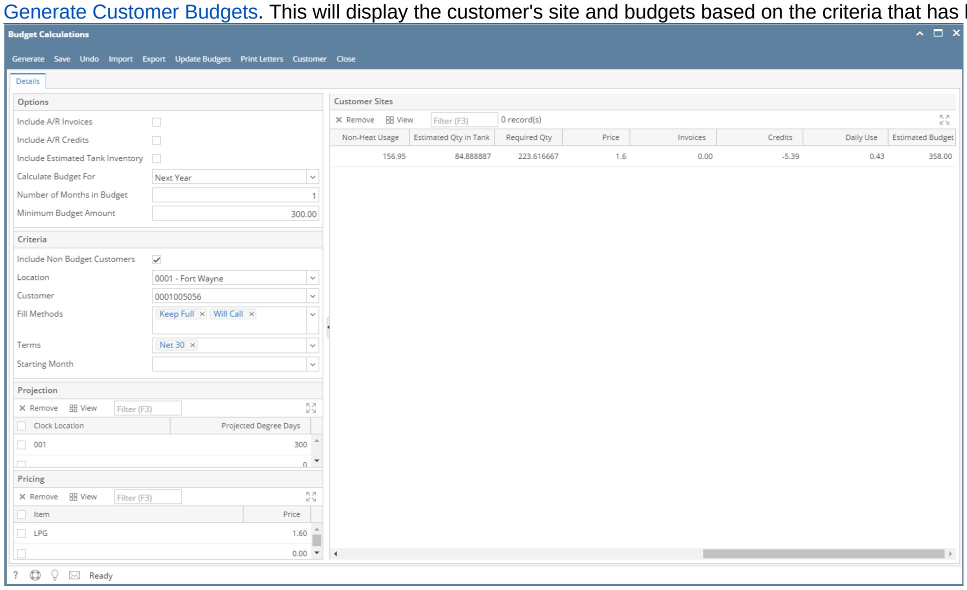
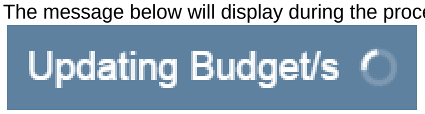
How to Update Budgets

1. On Menu panel, click the **Budget Calculation menu**. This will open the Budget Calculation screen.
2. Generate Customer Budgets. This will display the customer's site and budgets based on the criteria that has been set.

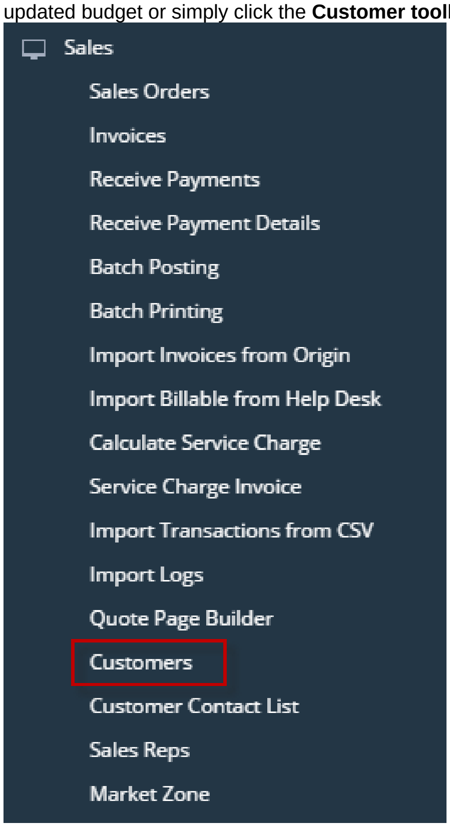


3. Select the customer you want to update the budgets. Click the **Update Budgets toolbar button**.

4. The message below will display during the process and will automatically closes once the update is finished.

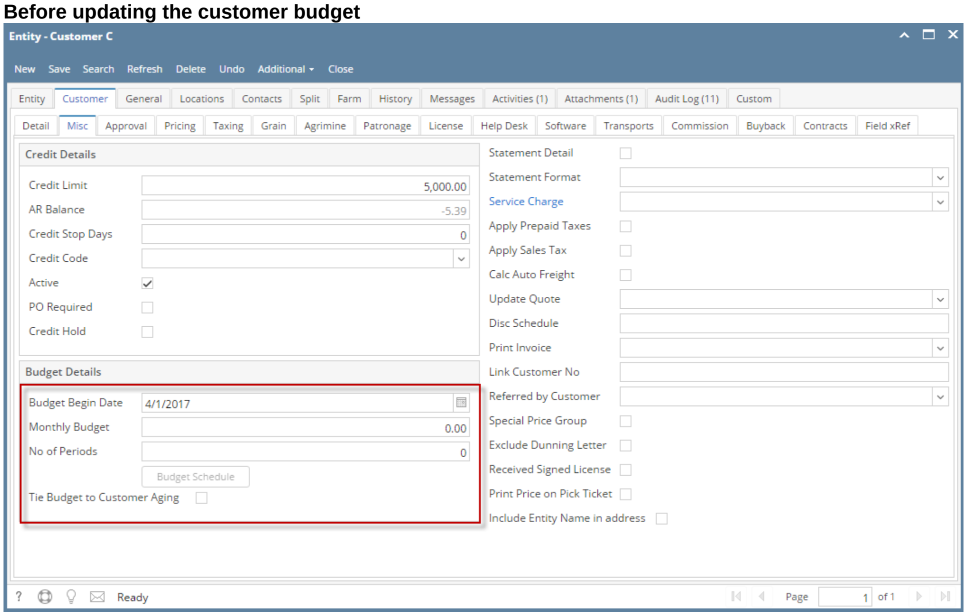


5. To check if the customer budget has been updated, click the **Customers menu** from Sales Menu panel and search for the customer with the updated budget or simply click the **Customer toolbar button** from Budget Calculation screen. This will open the Customer Entity search screen.



6. The Entity screen for the customer will display. Navigate to Customer tab > Misc. This will display the Credit and Budget Details.
7. Check the value in **Budget Details panel**.

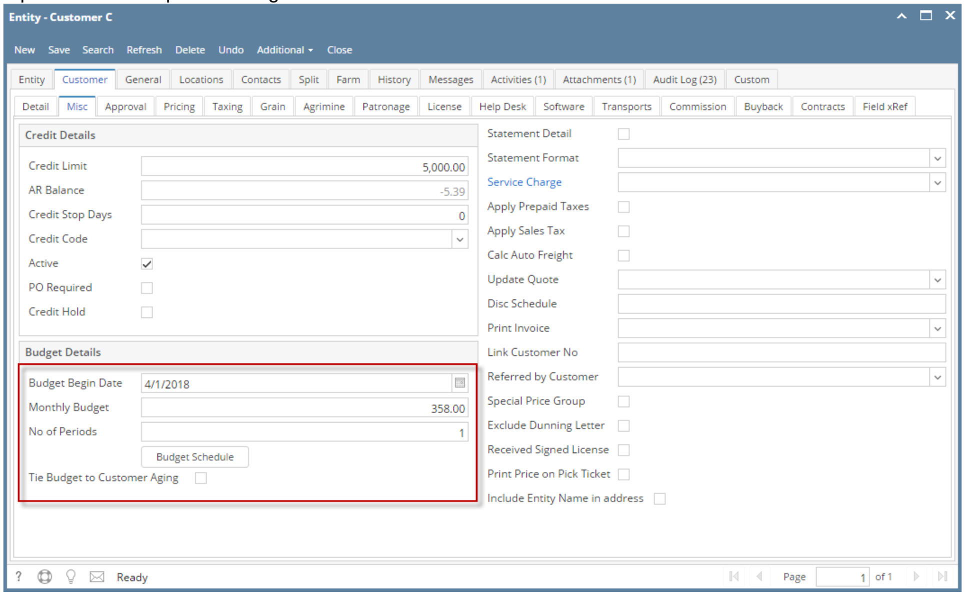
- **Before updating the customer budget**

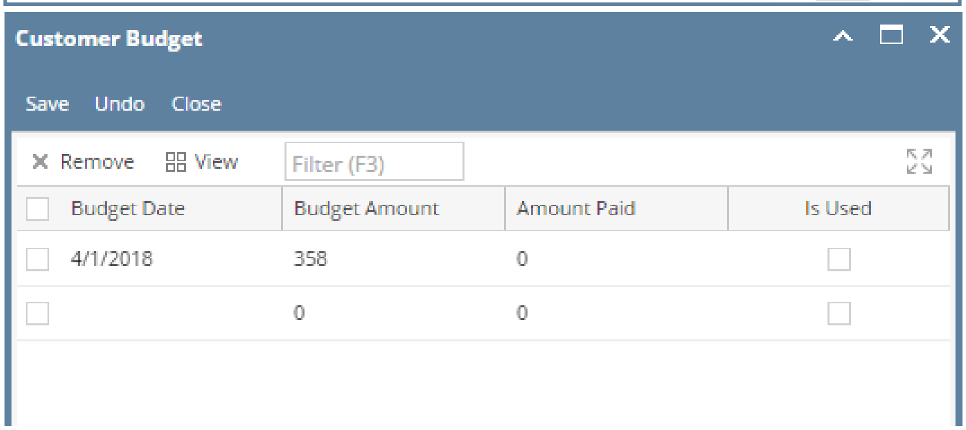


- **After updating the customer budget**

a. **Budget Begin Date -** Increases by 1 year if Budget Calculation > Calculate Budget For field = Next Year
b. **Monthly Budgets** - The budget is updated based on the value in Estimated Budget that has been generated from Budget Calculation screen.
c. **No. of Periods** - Displays the value entered in Budget Calculation > Number of Months in Budget field. This will determine the number of months created in Budget Schedule screen.
d. **Budget Schedule** - If Budget is Calculated for Next Year, Budget Date should be expanded by 1 year. All Monthly Amounts should be

equal to the new/updated Budget Amount.





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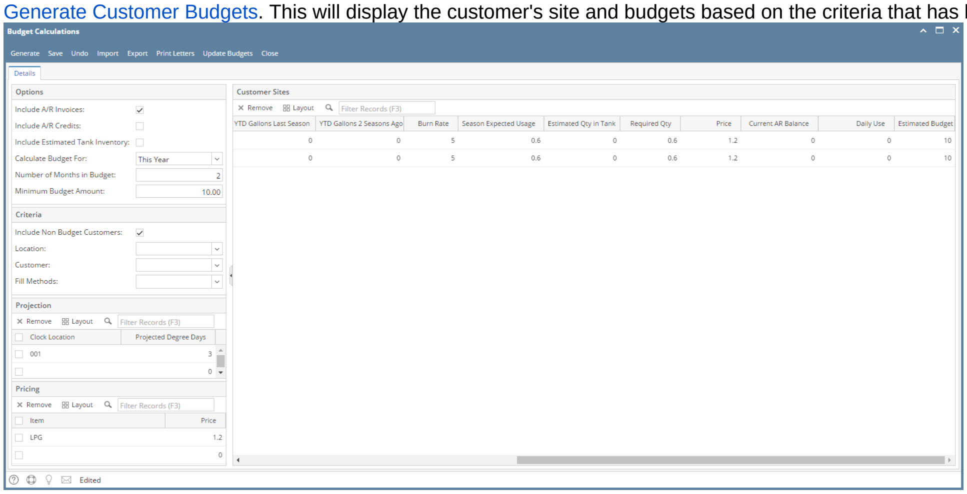
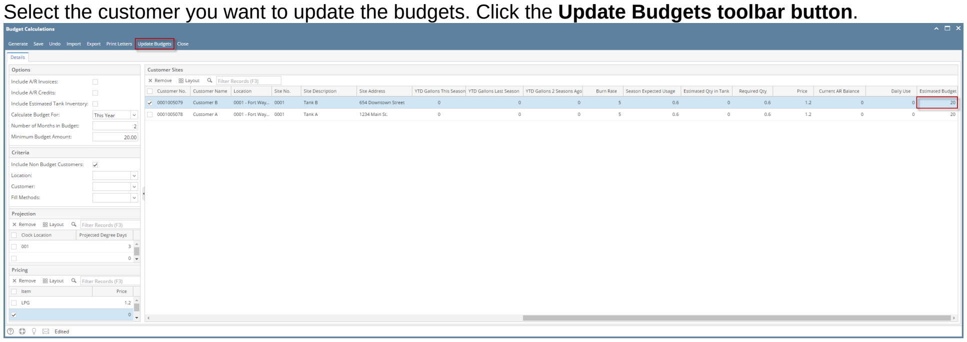


3. Select the customer you want to update the budgets. Click the **Update Budgets toolbar button**.



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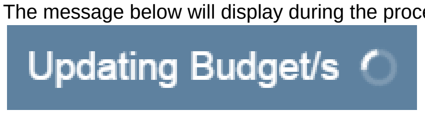
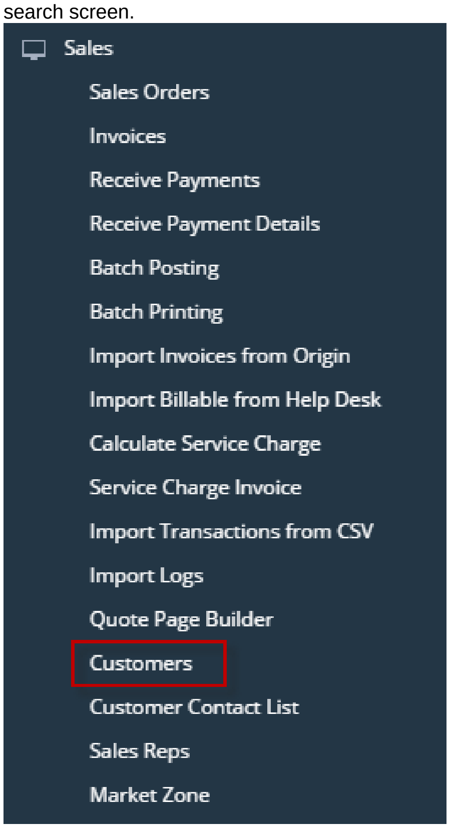
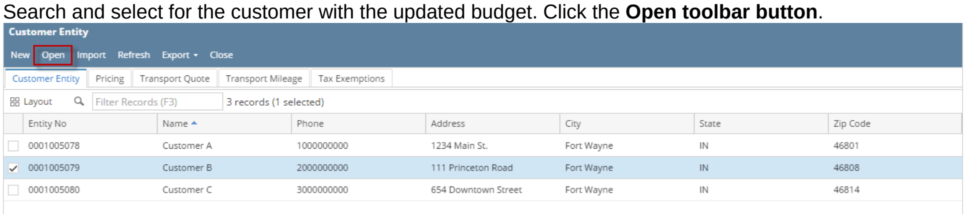


5. To check if the customer budget has been updated, click the **Customers menu** from Sales Menu panel. This will open the Customer Entity search screen.

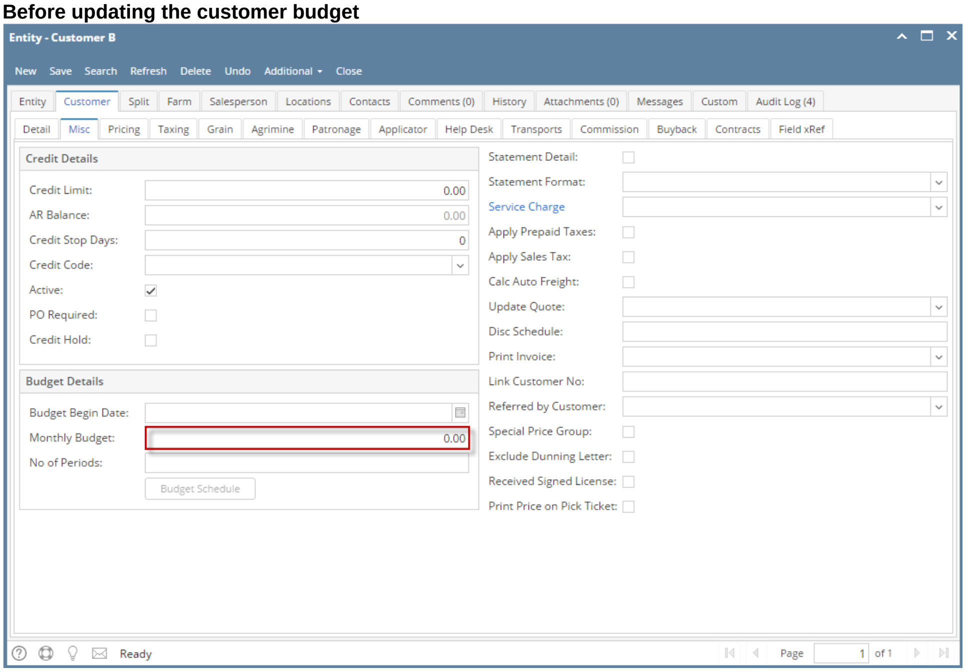


6. Search and select for the customer with the updated budget. Click the **Open toolbar button**.



7. The Entity screen for the customer will display. Navigate to Customer tab > Misc. This will display the Credit and Budget Details.
8. Check the value in **Budget Details > Monthly Budget field**. The budget is updated based on the value in Estimated Budget that has been generated from Budget Calculation screen.

- **Before updating the customer budget**



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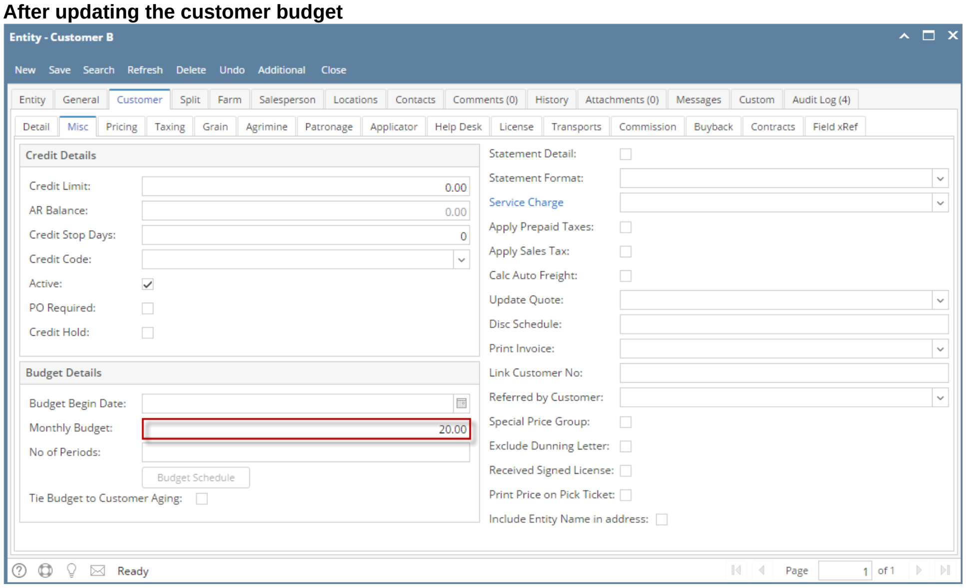

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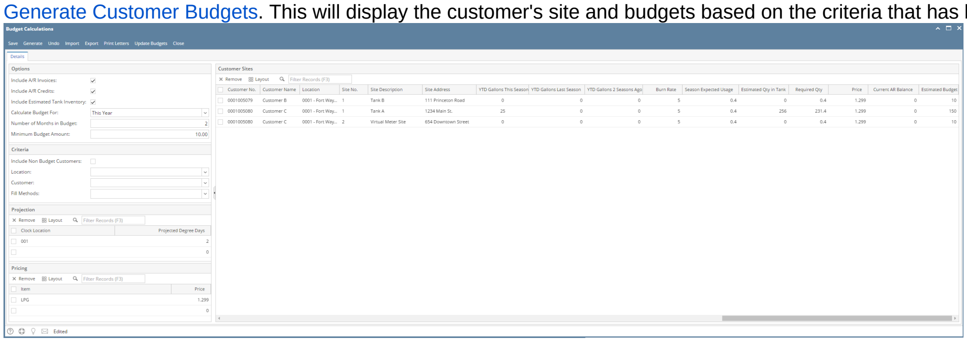

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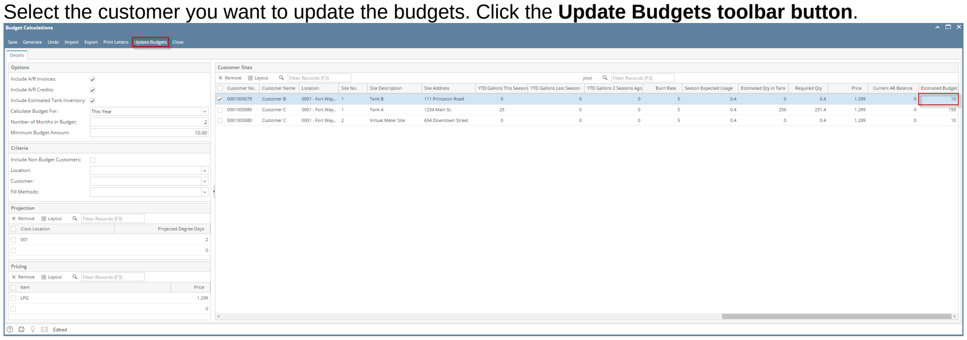

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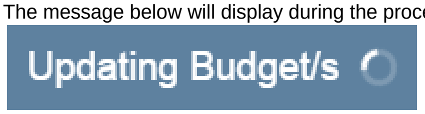

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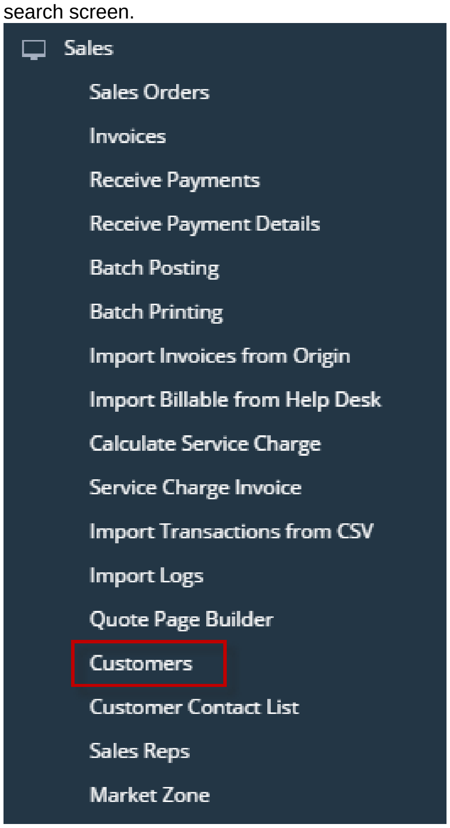

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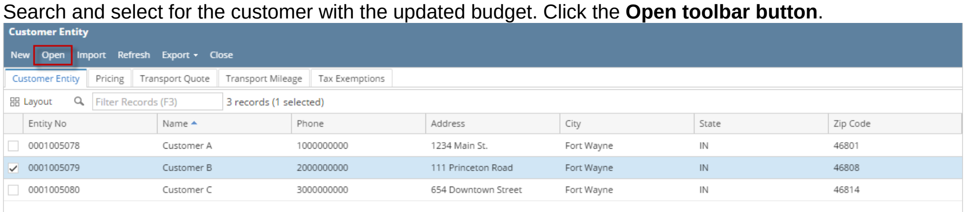

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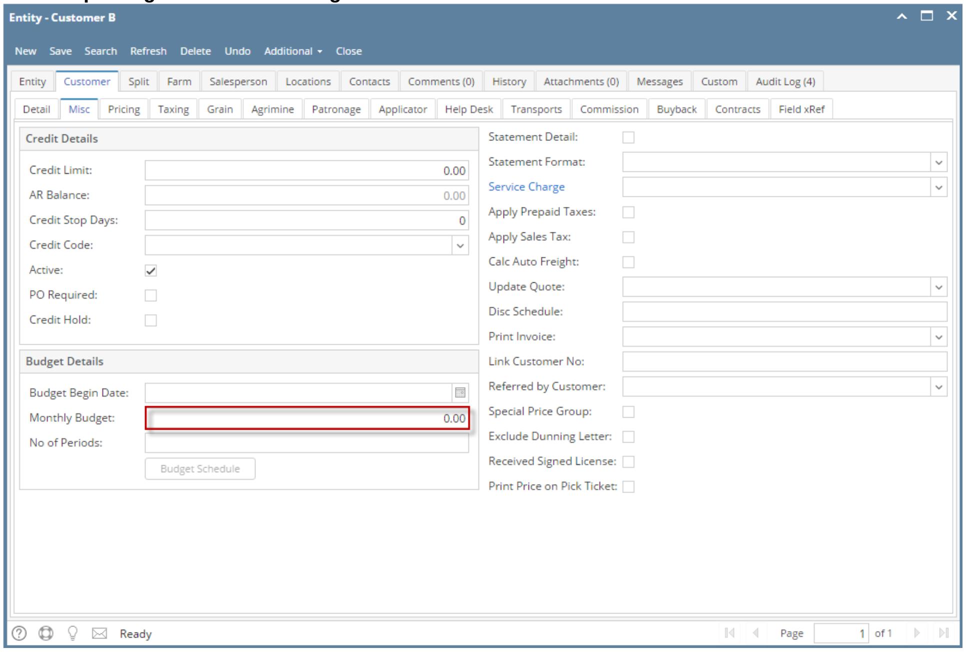
- **Before updating the customer budget**



- **After updating the customer budget**