

How to Apply Payment to Customer Budget

The **Apply to Budget** option can be used to receive payment for [Customer Budget](#). This option is enabled only when the customer have existing customer budget.

1. Make sure the customer have a customer budget setup. Refer to [How to Add Customer Budget Schedule](#). Here is a sample budget schedule for customer ABC Reseller.

The screenshot shows the 'Entity - ABC Reseller' interface with the 'Customer Budget' window open. The window has a title bar 'Customer Budget' and buttons for 'Save', 'Undo', and 'Close'. Below the title bar is a search bar 'Filter Records (F3)' and a table with the following data:

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

2. Go to **Sales | Receive Payment Details** menu. Click **New** button on the integrated search grid to open a new Receive Payments Detail screen. Some of the fields, like **Location**, **Currency**, **Bank Account**, and **Date Paid** are populated by default. You can still change the value of these fields if necessary.
3. Fill out the header details,
 - a. Select the **Customer No** the payment is from.
 - b. Select the **Location**.
 - c. Select a **Payment Method**.
 - d. In the **Amount Paid** field, enter the payment amount from the customer.
 - e. Fill out other fields as needed. Refer to [Receive Payments Detail | Field Description | Header Details](#) to help you in filling out the fields.
 - f. Check the **Apply to Budget** checkbox button.

4. **Post** the payment.
Here is the sample payment.

Receive Payments Detail - ABC Reseller

New Save Search Delete Undo Print Unpost Recap Close

Details Audit Log (17)

Customer No: 0001005095 Date Paid: 1/15/2016 Record No: RCV-255
 Location: 0001 - Fort Wayne Bank Account: 68215422 Payment Method: Check
 Amount Paid: 600.00 Unapplied Amount: 600.00 Check No: XXXX1241
 Currency: USD Apply on Account: Apply to Budget:
 Notes: Sample Apply to Budget.

View Invoice Layout Filter Records (F3)

Location	Due Date	Invoice No.	Terms	Invoice Total	Discount	Interest	Amount Due	Payment
				0.00	0.00	0.00	0.00	0.00

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Open the **Customer Budget** screen to view the update on the budget. Notice that the amount paid is deducted to the original budget amount.

Customer Budget

Save Undo Close

Remove Layout Filter Records (F3)

Budget Date	Budget Amount	Is Used
<input type="checkbox"/> 6/10/2016	1000	<input type="checkbox"/>
<input 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"/>
<input type="checkbox"/> 1/10/2016	400	<input checked="" type="checkbox"/>
<input type="checkbox"/>	0	<input type="checkbox"/>