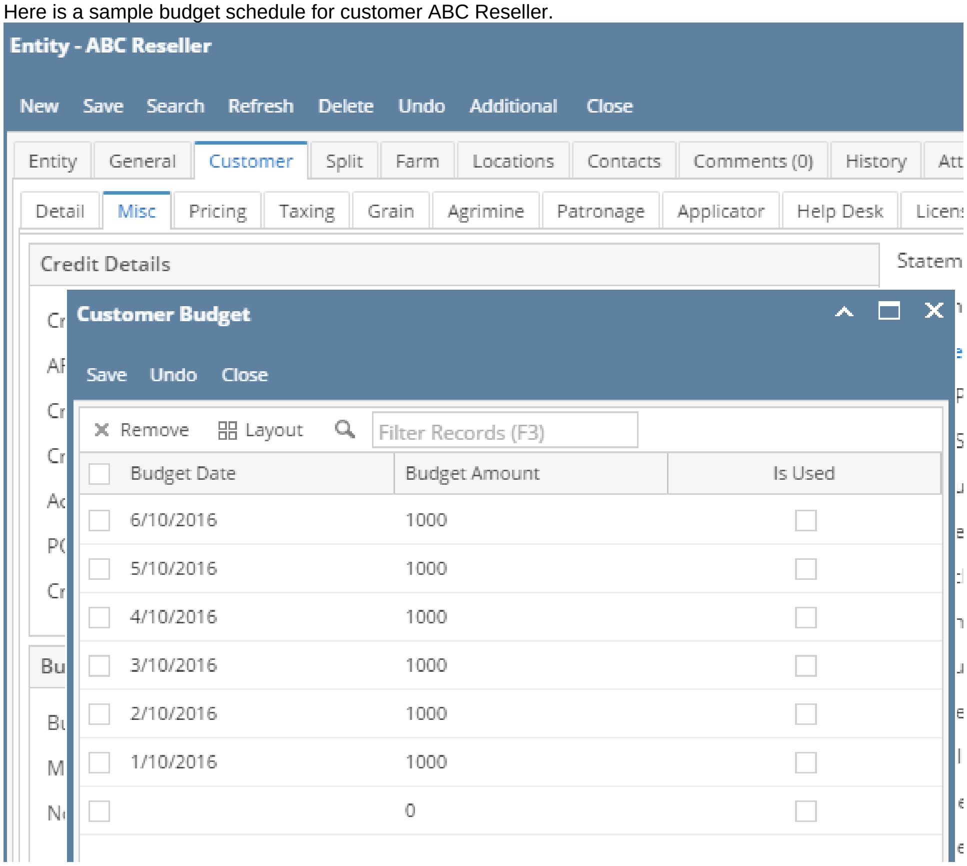
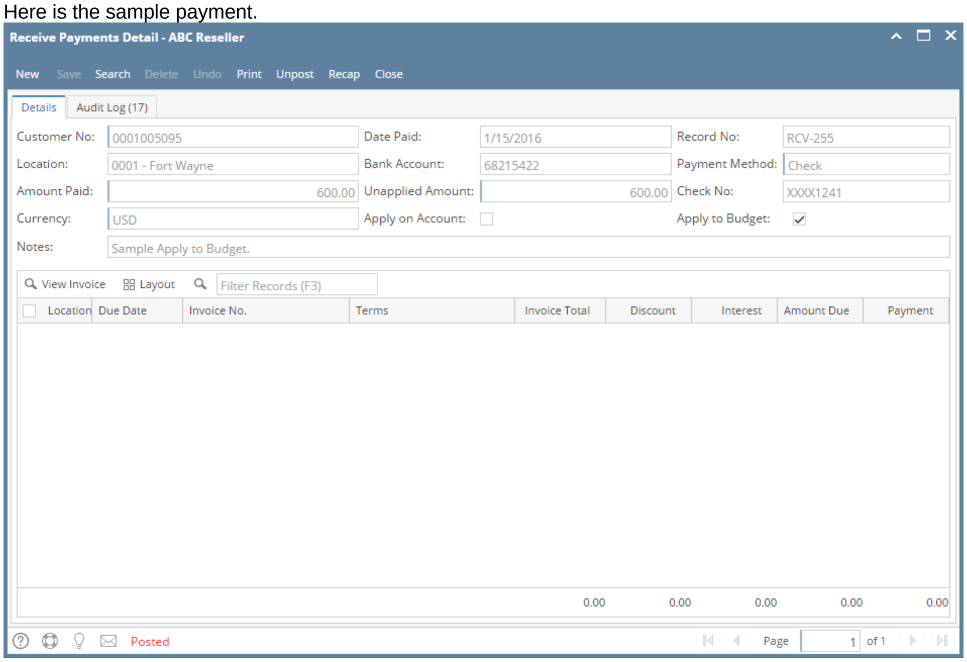
How to Apply Payment to Customer Budget

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.
   

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.



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