

# Using Budgets

[Transactions](#) let us track money when they become fact, but to compare plan with fact you need additional Budget tool.

Plan finances with Budgets feature - create planned incomes and expenses and then compare them to transactions with fact status.

The permissions are set by Jira-administrators in [CRM Administrator menu / Access](#) and configured in [Setting Up Budgets](#).

If budget has no included budgets "Plan" is filled manually. If budgets are included, then "Plan" is calculated from plans of included budgets and the field becomes read only.

Budget: 2017

Nina Lokotaeva (Teamlead)

Period

This year

From

01/Jan/17

To

31/Dec/17

Department \*

Any

Category \*

Any

People

Plan \*

190000.0

Fact

11,856,070

Progress %

225

+ Add budget

	Description	Period	Department	Category	Direction	Plan	Fact	Progress %
						190,000	138,588	53
<input type="checkbox"/>	Q1	01/Jan/17 - 31/Mar/17	Support	Any	Any	20,000	2,588	13
<input type="checkbox"/>	Q2	01/Apr/17 - 30/Jun/17	Support	Any	Any	100,000	118,000	118
<input type="checkbox"/>	Q3	01/Jul/17 - 30/Sep/17	Support	Any	Any	70,000	20,000	29

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Fact field is read only and is calculated automatically with transactions with "Fact" status that correspond to budgets conditions (period, direction, department etc.).