

Setting Up Budgets

The feature allows to create budgets in CRM starting with CRM 1.9.4.

To track money in JIRA there are [Transactions](#) in CRM but transactions let us monitor incoming money when they become fact, not compare plan with fact. Plan finances with [Budgets](#) feature - create planned incomes and expenses and then compare them to transactions with fact status. Budget tool will show plan (which you input manually), fact (which is calculated automatically from transactions) and progress in percentage.

First CRM administrator should give permission to create, edit and remove budgets in [CRM administrator menu / Access](#)

Then go to CRM administrator menu / Budget:

CRM ADMINISTRATION

Access

Companies

Contacts

Products

Transactions

Custom directories

Audit Log

Integrations

Direct Mail

Table lists

Budget

Contact Synchronization

Budget tabs

Tab title

Tab title (En)

Add

План

Plan

Fields

Delete

Budget attributes

Field title	Field title (En)	Field type	Tab	Is required	Show in grid		
		string (255 symbols)				Add	
Наименование	Description	string (255 symbols)	Plan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Период	Period	Period Name	Plan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Начало периода	Start Period	Start Date	Plan	<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete
Конец периода	End Period	End Date	Plan	<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete
Бизнес-линия	Department	Directory	Plan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Категория	Category	Directory	Plan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Направление	Direction	Direction	Plan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Контакт	People	Contact	Plan	<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete
План	Plan	Plan	Plan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Факт	Fact	Progress	Plan	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Прогресс	Progress %	Progress %	Plan	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Статьи	Included Budgets	Included Budgets	Plan	<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete

Card Size

Width : 1200

Height: 690

Save

Breadcrumbs settings

Description

Description

Description

Description

Description

Budget tabs

Create at least 1 tab to place further attributes in it.

Item	Description
Tab title	Input tab title in default local system language
Tab title (En)	Input tab title in English. Tab's titles will be shown in English if current user has set any other language than default local language in his/her profile.
Add	Press "Add" button to add new tab

Fields	Clicking on the "Fields" button opens the dialog with attributes that were included into current tab in attributes section below. The order of fields can be changeable and sets the order of fields in a budget card.
Delete	Deletes tab

Budget attributes

The order of attributes in the table sets the order of fields in the grid. The attributes can be drg'n'dropped in different order.

Item	Description
Field title	Input field title in default local system language
Field title (En)	Input field title in English. Field's titles will be shown in English if current user has set any other language than default local language in his /her profile.
Field type	Select a type from dropdown list. Read more about types at Dictionary Attribute Types and Properties
Tab	Select tab from dropdown list of tabs that were created above. When attribute is added to a tab, it appears in fields list (Budget tabs / Fields button). If no tab is selected, the attribute will not be shown in budgets.
Is required	The attribute is required when checked
Show in grid	When checked, the attribute is shown in grid. When unchecked, the attribute is only in budget card.
Add	Press "Add" button to add new attribute
Properties	Opens the dialog with attribute's properties. Read more: Dictionary Attribute Types and Properties
Delete	Deletes attribute

Card size

Define width and height of budget card in pixels.

The screenshot shows a 'Budget Card' dialog box within a software interface. The dialog box has a title bar 'Budget' and a 'Plan' tab. It contains several input fields: 'Description *', 'Direction *' (with a dropdown menu set to 'Any'), 'Period' (with 'Custom' selected and date pickers for 'From' and 'To'), 'Department *' (set to 'Software'), 'Category *' (set to 'Client'), 'People' (with a dropdown menu), 'Plan *', 'Fact', and 'Progress %'. At the bottom, there is a table with columns: 'Description', 'Period', 'Department', 'Category', 'Direction', 'Plan', 'Fact', and 'Progress %'. The 'Plan', 'Fact', and 'Progress %' columns have the value '0'. Below the table are 'Print', 'Save', and 'Close' buttons. A red double-headed arrow labeled 'Width' spans the width of the dialog box, and a red double-headed arrow labeled 'Height' spans the height of the dialog box.

Breadcrumbs settings

Breadcrumbs settings were made to navigate deeper into included budgets. Select attributes from dropdw list of existing budget attributes to be output in address line when you select one included budget after another.

План	Plan	Plan	Plan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Факт	Fact	Progress	Plan	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Прогресс	Progress %	Progress %	Plan	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Статьи	Included Budgets	Included Budgets	Plan	<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete

Card Size

Width : 1200

Height: 690

Breadcrumbs settings

Description

Description

Description

Description

Category

Department

✓ Description

Direction

End Period

Fact

Included Budgets

People

Period

Plan

Progress %

Start Period

Budget: 2017 / Q2 / Warranty

Nina Lokotaeva (Teamlead)

Breadcrumbs

Budget card's creator

Plan

Description *

Direction *

Period

Department *

Category *

People

Plan *

Fact

Progress %

+ Add budget

Warranty

Any

Last quarter From 01/Apr/17 To 30/Jun/17

Support

Client

100,000

225,000

225

Description

Period

Department

Category

Direction

Plan

Fact

Progress %

Print

Full page

Remove

Save

Close