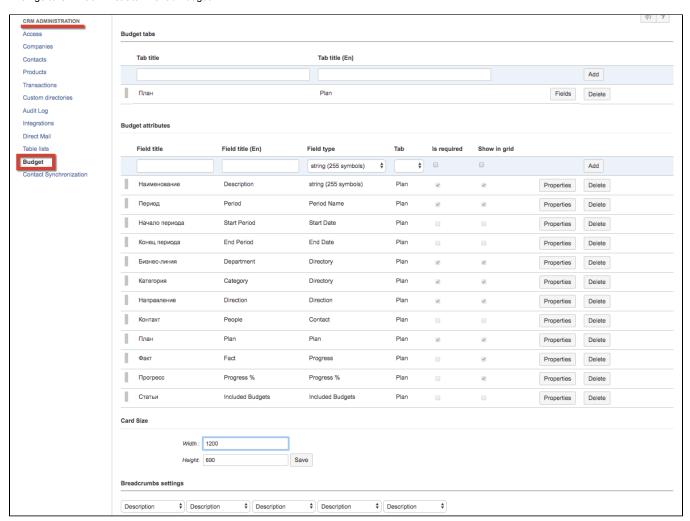# Setting Up Budgets

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:

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'droped 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.

Breadcrumbs settings

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

⋮⋮	План	Plan	Plan	Plan	☑	☑	Properties	Delete
⋮⋮	Факт	Fact	Progress	Plan	☐	☑	Properties	Delete
⋮⋮	Прогресс	Progress %	Progress %	Plan	☐	☑	Properties	Delete
⋮⋮	Статьи	Included Budgets	Included Budgets	Plan	☐	☐	Properties	Delete

Card Size

Width : 1200

Height: 690

- Category
- Department
- ✓ Description
- Direction
- End Period
- Fact
- Included Budgets
- People
- Period
- Plan
- Progress %
- Start Period

Breadcrumbs settings

| Description ⇕ | Description | Description ⇕ | Description ⇕ |

Budget: 2017 / Q2 / Warranty ← **Breadcrumps**   **Budget card's creator** → Nina Lokotaeva (Teamlead)

Plan

Description *	Warranty
Direction *	Any ▾
Period	Last quarter ⇕ From 01/Apr/17 📅 To 30/Jun/17 📅
Department *	Support
Category *	Client
People	▾
Plan *	100,000
Fact	225,000
Progress %	225

+ Add budget

Description	Period	Department	Category	Direction	Plan	Fact	Progress %

| Print | Full page | Remove | | | Save | Close |