

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

Direction *

Any

Period

This year

From

1/Jan/17

To

31/Dec/17

Department *

Any

Category *

Any

People

Plan *

6,950

Fact

11,811,071

Progress %

169943

+ Add budget

	Description	Period	Department	Category	Direction	Fact	Plan	Progress %
						93,589	6,950	197
<input type="checkbox"/>	Q2	01/Apr/17 - 30/Jun/17	Support	Any	Any	71,000	0	0

Print

Full page

Remove this card

☒ Planned transactions

Save

Close

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

Planned transactions checkbox

You can display *planned transactions* in budgets to use them instead of budgets.

Budget: 2017

Direction *

Period From To

Department *

Category *

People

Plan *

Fact

Progress %

+ Add budget

	Description	Period	Department	Category	Direction	Fact	Plan	Progress %
						91,001	3,950	253
<input type="checkbox"/>	Q3	01/Jul/17 - 30/Sep/17	Support	Any	Any	20,001	3,950	506
<input type="checkbox"/>	Q2	01/Apr/17 - 30/Jun/17	Support	Any	Any	71,000	0	0

Print Full page Remove this card ☐ Planned transactions Save Close

For example, you can make 3 budget cards in the budget card on the development department:

- salary - 100 dollars
- server - 20 dollars
- advertising - 10 dollars

And vice versa, you can display planned transactions instead of 3 embedded cards (in case you have planned transactions).

Budget: 2017

Fact

Progress %

+ Add budget

	Description	Period	Department	Category	Direction	Fact	Plan	Progress %
						91,001	3,950	253
<input type="checkbox"/>	Q3	01/Jul/17 - 30/Sep/17	Support	Any	Any	20,001	3,950	506
<input type="checkbox"/>	Q2	01/Apr/17 - 30/Jun/17	Support	Any	Any	71,000	0	0
-		22/Sep/17	Hosting	Client	Income	-	49,290	-
ндс		4/Apr/17	Software	Software Supplier	Expense	-	-238,449	-
ндс		26/Jan/17	Software	Taxes	Expense	-	-1,098	-
-		12/Oct/17	Software	Client	Income	-	18,000	-
-		12/Jul/17	Software	Client	Income	-	18,000	-
-		20/Feb/17	Software	Supplier	Expense	-	-610	-

Print Full page Remove this card ☒ Planned transactions Save Close