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2.02.08 Budget

The Budget mask manages the project-related budgets in the system. Here, a budget item can be defined for a project using any cost element. You can define internal budgets (i.e. cost specifications/planned costs) and/or external budgets (items that are to be charged on for a specific project, such as travel or travel expenses). These budget items are compared in the system with the costs entered, as the basis for different plan/actual comparisons.




The mask consists of the following elements:

General Data



- **Basic Information:**

- **Number:** The system assigns a unique number for the budget item in the Number field. The Number field can also be edited after creation.
- **Description:** This field indicates the name of the budget item.
- **Budget (internal):** This field defines the internal budget (that is, the cost specification) for the selected budget item. These internal budgets are included in the internal planned costs of the project.
- **Surcharge:** This field allows you to enter an additional amount for the budget. If the overhead is defined, the system determines the external budget from the internal budget and overhead.
- **Budget (external):** This field defines the external budget (that is, the amounts that are to be charged on for the project) for the selected budget item. These external budgets are included in the planned revenues for the project and can be transferred to the offer.
- **Budget Difference:** This field calculates the difference between internal and external budget.
- **Actual Costs Net:** If this budget is assigned in the cost entries, these actual costs are displayed in the budget.
- **Period (from/to):** The fields indicate the start and end of the validity of the budget item. If a project is selected, these fields are filled with the start and end of the assigned project.
- **Cost:** This field defines the cost type for the defined budget item. These cost elements are later compared with the entered costs in the plan/actual comparisons and can be defined and changed in the cost types mask.
- **Project:** This field defines the project to which the defined budget item belongs. A budget item can be assigned to both a main project and a sub-project. The projects can be defined and changed in the project mask.
- **Product:** This field is without function in the standard version.
- **Supplier:** This field identifies the supplier for the defined budget. If incoming invoices (external invoice) are entered for this project, the system compares the amounts with the budget (and warns if the budget is exceeded). The suppliers can be defined and changed in the Contact screen (with the contact type supplier).

- **Note:** This field allows you to enter remarks about the budget item.
- **Item:**
 - **Number of Items (planned), Item:** The number and type of an external service can be entered here if the budget item refers to external services (e.g. databases, hardware, ...). After activating the green check mark, the internal and external budgets are determined by the system from the purchase and sales prices of the external service.
- **Item Sales:**
 - **Number of Items (actually):** 
 - **Number of Items (Difference):** 
 - **Item Sales:** 

Misc



- **Technical Details:**
 - **InternalNo.:** This alphanumeric field clearly identifies the budget. This number is proposed by the system.
 - **Offer Position:** This field contains a link to the purchase order item (if the budget has been adopted in the purchase order).
 - **BudgetPeriod:** Time period in which the budget is valid.
- **Incoming Invoice Positions:** This field contains a link to the incoming invoice line item (if the budget has been copied to the incoming invoice).
- **Receipts:** This field contains a link to the receipts (if the budget has been assigned in the receipt).
- **Travels:** This field contains a link to the trips (if the budget has been assigned in the trip).
- **Invoice Lines:** Related invoices for this budget.

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