



# Service Providers - Customer budgets

Planon Software Suite  
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# About this Document

## Intended Audience

This document is intended for *Planon Software Suite* users.

## Contacting us

If you have any comments or questions regarding this document, please send them to: [support@planonsoftware.com](mailto:support@planonsoftware.com).

## Document Conventions

### **Bold**

Names of menus, options, tabs, fields and buttons are displayed in bold type.



### *Italic text*

Application names are displayed in italics.

### CAPITALS

Names of keys are displayed in upper case.

## Special symbols

	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

# Table of Contents

Customer budgets solution for Service Providers.....	6
Required TSIs for the Customer budgets solution.....	6
Roles and processes.....	7
Concepts.....	8
Customer budget definitions.....	8
Customer budgets.....	8
Customer budget periods.....	9
Budget modifications.....	10
Budget transactions.....	10
Customer contracts.....	12
Contract lines for customer contracts.....	12
Customers.....	13
Life cycle.....	14
Revenues.....	14
Revenue estimations and customer quotations.....	15
Scopes types.....	16
Service agreement services.....	17
Service components.....	17
Service level.....	18
Service locations.....	18
Service terms - general and specific.....	19
Service provider.....	19
Subcontractors.....	19
Threshold behavior.....	20
Working with.....	22
Adding customer budget definitions.....	22

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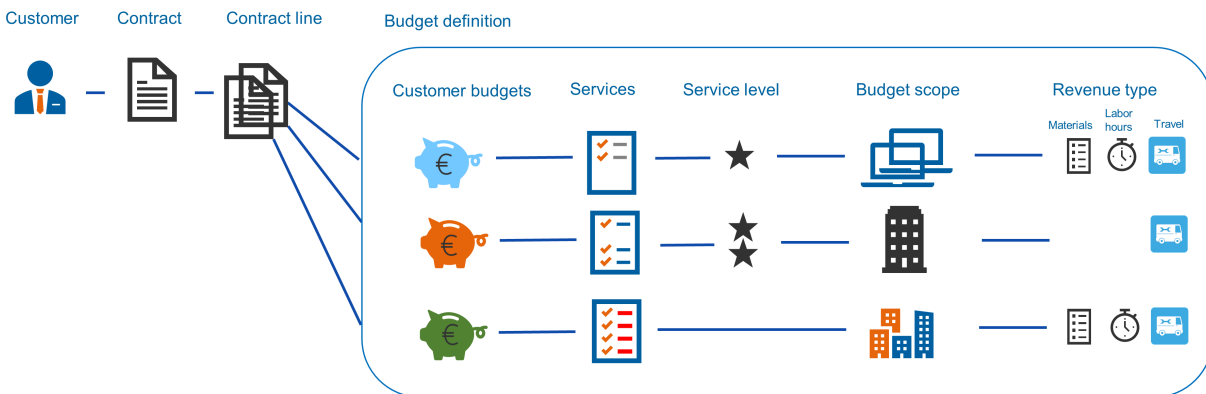
Running the 'Check for scope overlaps'.....	23
Adding customer budgets.....	24
Adding customer budget periods (optional).....	24
Configuring threshold behavior.....	25
Adding modifications to a customer budget.....	26
Deep copying customer budget definitions.....	26
Recalculating budget period amounts.....	27
Customer budgets and back-office operations.....	29
Field descriptions.....	31
Customer budget definition fields.....	31
Customer budget fields.....	33
Budget periods fields.....	35
Budget modification fields.....	37
Budget transaction fields.....	37
Events triggering customer budget transactions.....	38
Index.....	41

# Customer budgets solution for Service Providers

Planon offers service providers an enhanced way to provide their services. With Planon's Customer budgets (also known as 'Bank of Money'), service providers can deliver their agreed services to their customers at optimized prices.

Typically, service providers and their customers agree on a pre-determined budget in exchange for the service provider's services during a specified period of time, or sometimes even for an unspecified period. When a budget ends, the service providers can use Planon to determine whether they have incurred a loss or made a profit.

In the application, customer budgets can be defined and applied in such a way that the revenues are settled very accurately with the existing customer budget. As a result, the service providers and their customers will have less administration. Service providers are also able to track the balance of a specific customer budget and decide whether to negotiate more budget, or limit expenses / revenues.



## Required TSIs for the Customer budgets solution

The following TSIs are required to configure the Customer budgets solution.

### Customer configuration

- The **Customers** TSI - selection steps with existing customer data (**Customers** and **Service locations**).
- The **Customer contracts** TSI - existing selection steps with contract data.

### Service Provider configuration

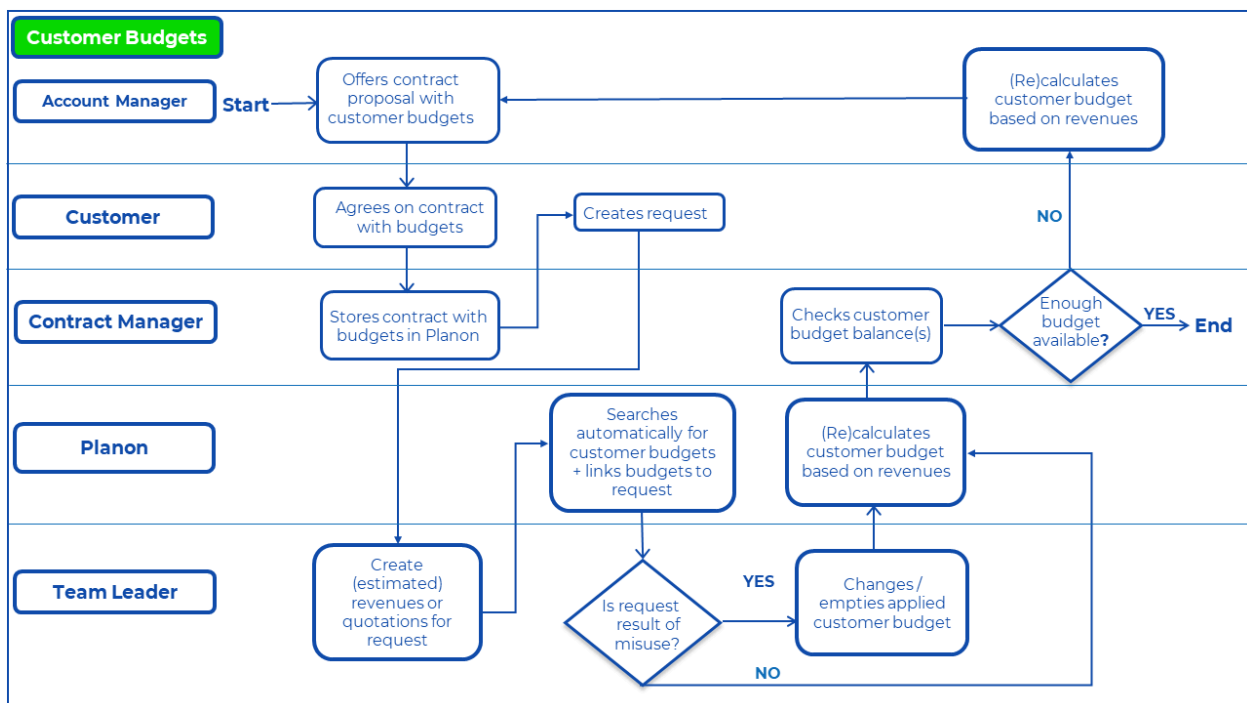
- **Customer budgets** TSI - selection steps with configured customer data (**Customers**, **Customer budget definitions**, **Customer**

**budgets, Customer budget periods , Budget modifications, Budget transactions, Contracts, and Contract lines).**

- The **Work Orders** TSI - with configured customer budget related features on the layouts of Order revenues, Revenue estimations and Customer quotation lines. For example; the **Customer budget** reference field.

## Roles and processes

The following illustration displays the roles and process that are specific for **Customer budgets**. Some processes are manual and some are automatic (triggered by the system).




# Concepts

The following topics describe the concepts that are key to understanding the functionality.


## Customer budget definitions

Customer budget definitions are used to register specific settings for one or multiple budgets. When you add a budget definition, you must link it to a specific customer and one or more customer contract(s). Budget definitions are 'life cycle aware' business objects. See [Adding customer budget definitions](#) for the procedure. The customer budget definitions need not have a fixed end date and can remain active for multiple years. Any budgets that you create for a customer budget definition must fall within the budget definition's start date and end date (if specified).

 If you allow multiple, recurring budgets under a budget definition, these budgets *cannot* overlap in time and must have the same scope type.

### Scope

A budget definition is characterized by its [scope type](#). The scope type plays an essential part in the process of automatically *detecting* the right budget when the back-office creates an order for a customer.

 It is recommended to create [user-defined business objects](#) and corresponding [user-defined statuses](#) for customer budget definitions in Field definer .

### Statuses

Customer budget definitions can have the following statuses:

- **Initial**
- **Active**
- **Closed**

Useful facts about these statuses:

- A customer budget definition can only be deleted or changed if it has the **Initial** status.
- If you change the status of a **Customer budget definition** from **Initial** to **Active**, all linked budgets' statuses are also changed to **Active**.
- In order to set the status to **Closed**, you must first set all the linked budgets to **Closed**.

## Customer budgets



The key feature of **Customer budgets** is the ability to *monitor* the approved budgets. A customer budget is an assigned amount to be spent on a task or a project for the related customer for a specific period of time. Every budget belongs to a specific customer budget definition.

Customer budgets can have the following statuses:

- **Initial**
- **Active**
- **Blocked**
- **Closed**

Useful facts about these statuses:

- A customer budget can only be deleted in its **Initial** status. Any changes can also only be done in the **Initial** status. You cannot set a customer budget to the **Active** status if the linked customer budget definition is still in the **Initial** status.
- If you change the status of a **Customer budget** from **Initial** to **Active**, all linked budget periods statuses are also changed to **Active**.
- You cannot create a new customer budget for a linked customer budget definition that is in **Closed** state.
- In order to set their status to **Closed**, you must first set all the linked budget periods to **Closed**.  
You can only transfer budget records to the archive that are in the **Closed** status.


 You can archive **Customer budgets** that are no longer relevant. To enable the archiving feature, you must add the actions **Transfer to archive** and **Retrieve from archive** to the appropriate **Customer budgets** layouts.

## Customer budget periods

The use of budget periods is optional. Budget periods can be helpful if you want to monitor a budget more closely and frequently.

Example: You have an annual budget and you want to monitor the budget on a monthly basis, you need to create one period for each month; 12 budget periods in total. You then divide the total budget sum over these 12 periods, depending on how much money you intend to spend in each budget period. While the budget is in use, you keep monitoring its actual use per month against the expected use.

Customer budget periods are defined for a specific customer budget. They become read-only as soon as the status of the corresponding customer budget is set to **Active**. The system statuses that are available for a budget period are **Initial** and **Active**.

 When you apply a [budget modification](#) to a budget (by increasing or decreasing the amount), the amounts of linked budget periods are also updated.

Useful facts about these statuses:

- You cannot set a budget period to the **Active** status if the linked customer budget is still in the **Initial** status.
- You cannot edit the budget period's start date. However, you can edit the latest budget period's end date.
- You can only delete a budget period if it is still in the **Initial** status.
- You cannot add budget periods to a budget that is in the **Closed** status.

## Budget modifications

Managers of customer budgets can use the **Add modification** feature to modify the amount on a budget. With a budget modification, they can increase or decrease the budget amount to accurately reflect the latest state of affairs.

Customer budget modifications can have the following statuses:

- **Initial**
- **Approval requested**
- **Approved**
- **Rejected**

Useful facts about these statuses:

- You can only change the status of a budget modification to **Approved** if the linked budget has the **Active** or **Blocked** status.
- Once approval is requested for a modification, or when it is approved, the amount can no longer be changed.
- When a modification is approved, the amounts on the budget (and any linked budget periods) will be updated.
- If **Customer budget modifications** have the **Approved** status they can no longer be deleted.



Any linked [budget periods](#) are also taken into account in a modification, if their date-times match with the modification's date-times. On the modification, you can manually redistribute the new budget period amounts as required.

For information about adding modifications, see [Adding modifications to a customer budget](#).

## Budget transactions

In **Customer budgets**, budget transactions are created automatically whenever (re)calculation of the budget revenues is required. The purpose of budget transactions is to fill or update the relevant *Total amount* and *Balance amount* fields on budgets (and

budget periods). Transactions take place in response to specific 'back-office events' on the order such as: *adding / deleting records*, *status changes* (on orders or customer quotations), *field changes*, and so on.

Budget transactions and the ensuing budget (re)calculations are not only triggered by field or status changes on the *order*, but also by field changes and/or status changes on *revenue related* business objects such as:

- **Order revenues** (subtypes: General, Labor hours, Materials, Travel, Subcontractor)
- **Customer quotation lines** (subtypes: General, Labor hours, Materials, Travel, Subcontractor)
- **Revenue estimation lines** (subtypes: General, Labor hours, Materials, Subcontractor)

See [Events triggering customer budget transactions](#) for more information on which field is recalculated by which event.



Some changes on **Order** fields can have a bigger impact than just recalculating amounts. Changes on the following **Order** fields will (highly likely) lead to a different applicable budget: **Customer**, **Contract line** and **Service agreement service**. Therefore, if the budget is no longer applicable, changing these fields will clear the **Customer budget** field. The **Manual budget?** field is only reset to the default value if there are no applicable budgets available to select manually. See [Revenue estimation lines - fields](#), [Customer quotation lines - fields](#) and [Order revenue fields](#).


### Example of budget & budget period revenue calculation


*The effect of budget transactions on the amounts of budget & budget period*



# Customer contracts

Contracts are binding agreements that are made between service providers and their customers. In a contract, you specify the contract details, the related service agreements and terms per service location.

 When configured, it is possible to view 'Contract history' and 'Contract line history' for **Customer contracts** to keep track of specific contract (line) information. History selection steps can be added to the **Customer contracts** TSI at the **Contract lines** level and **Service Agreements** level. For more information on adding these history steps, see [Configuring selection levels and selection steps](#) and [History](#).

 For more information on contract fields, see [Contract data fields](#).

## Contract lines for customer contracts

In the Service Providers solution, contract line(s) and their associated service agreements and terms determine the way your revenues are calculated for orders executed under a customer contract. In Planon ProCenter revenues ensuing from a contract + service agreement are calculated via an **SLA amount** contract line. As soon as an order is added, a search mechanism is triggered to find the applicable corresponding contract line, based on the combined information **Customer + Property + Service agreement**.


There are several contract line types available for customer contracts:

- *Standard* - this type applies to regular contractual activities. These contractual activities are carried out because the customer or an operative of the service providing organization found an issue and reported it. This type of contract line is automatically found when searching the right service for an order, based on the combined information **Customer + Property + Service agreement**.
- *Special* - a type that is not found automatically. This type can only be chosen manually on the order for exceptional situations, for example if a warranty still applies to an asset.
- *Proactive* - this type applies to special contractual activities which may be detected and reported *proactively* by an engineer of the service providing organization, usually against lower rates than the standard contractual activities. Proactively reported work should always be registered under a separate **SLA** contract line of type *proactive*, with separate terms attached. Only designated tradespeople and other users with special permissions are allowed to report work proactively. See [Proactive reporting of contractual work](#). If they report an issue, the system will check for associated contract lines of the type *proactive*. If such contract lines are found, the associated terms are applied. If


no such contract lines are found, the standard contract line and its associated terms are applied.

 'Proactive' contract lines cannot be linked to service levels.

- *Non-contractual work contract line* - if no standard or proactive contract line is found in the process of searching a service, the system will automatically search for a non-contractual contract line for the combination 'customer + property'.
- *Preventive* - this type applies to contractual activities related to *preventive maintenance* contracts. This contract line type can only come from the contract. It is not possible to manually create it on a PPM order. Preventive contract lines allow for flexible revenue calculations on PPM orders. You can link *service agreement services* to this contract line type. Also see the note at the bottom of this topic, about editing an existing contract line.

 Per contract line, you can only link 1 service agreement per specified period, of the type **Service agreements-contract lines**, as linked service agreements are not allowed to overlap. The terms (General terms, Labor hour terms, Subcontractor terms, Material terms, Travel terms) related to the service agreement determine how order revenues are calculated for PPM orders.

 Preventive contract lines cannot be used for **Customer budgets**.

 Typically, you can only *edit* the **Contract line type** field while the contract line is still in the **Inactive** or **Precalculate** status. Depending on the type you select, changing the contract line type may mean that links to Service agreement services or Service levels are no longer applicable. In that case, a warning is displayed and the links will be removed if you proceed. The exception to this editing 'ban' on **Active** contract lines is changing an existing active contract line from **Standard** to **Preventive**. This is possible, by clearing the **Contract line type** field first and saving the empty value, and by selecting **Preventive** next and saving that value. Please note that changing a value on an active contract line is only possible if no general terms or service agreements are linked.

## Customers

In Planon, the organizations a service provider is working for are registered as **Customers**. You can register the customer organizations in a hierarchical structure in the **Customers** TSI (3 levels). In addition, you can define service location types and add service locations for these customers. In **Customer contracts** you can link a customer to one or more contracts, as a contracting party.

Depending on your configuration, the **Customers** selection level is available in the following TSIs:

- Customer contracts
- Assets

- Work Orders
- Spaces & Workspaces
- Meters
- Projects
- Open module

See [Defining customer-related data](#), [Adding customers](#), [Adding service location types](#) and [Adding service locations](#) for more information on adding customer-related data.

## Life cycle

A customer budget definition's life cycle enables you to track the changes over time. In its lifetime, a customer budget definition passes through a series of stages. There is a start date and an end date associated with a customer budget definition. In the interim, a customer budget definition can enter different stages depending on the changes made to its data. A new life cycle can be added using the **Add modification** action on the budget definition.

Changes can be applied to the budget definition's scope over an active period , for example by linking new **Properties**, **Assets**, or **Contract lines** .

## Revenues

The term 'Revenues' refers to the money you receive for the services you delivered to your customers. Revenues are generated and saved on orders for customer contracts that are added or updated in the Work Orders TSI. Revenues are calculated via the [service terms](#) that belong to the [service agreement\(s\)](#) linked to an order.

The following types of order revenues are available:

- Labor hour revenues
- Subcontractor revenues
- Material revenues
- Travel revenues
- Bonus-malus revenues
- General revenues

When an order is added or updated, a [search mechanism](#) is triggered to find the applicable corresponding [contract line](#), based on the combined information **Customer + Property + Service agreement**. In addition, once the contract line is found, it also searches for an applicable [customer budget](#).



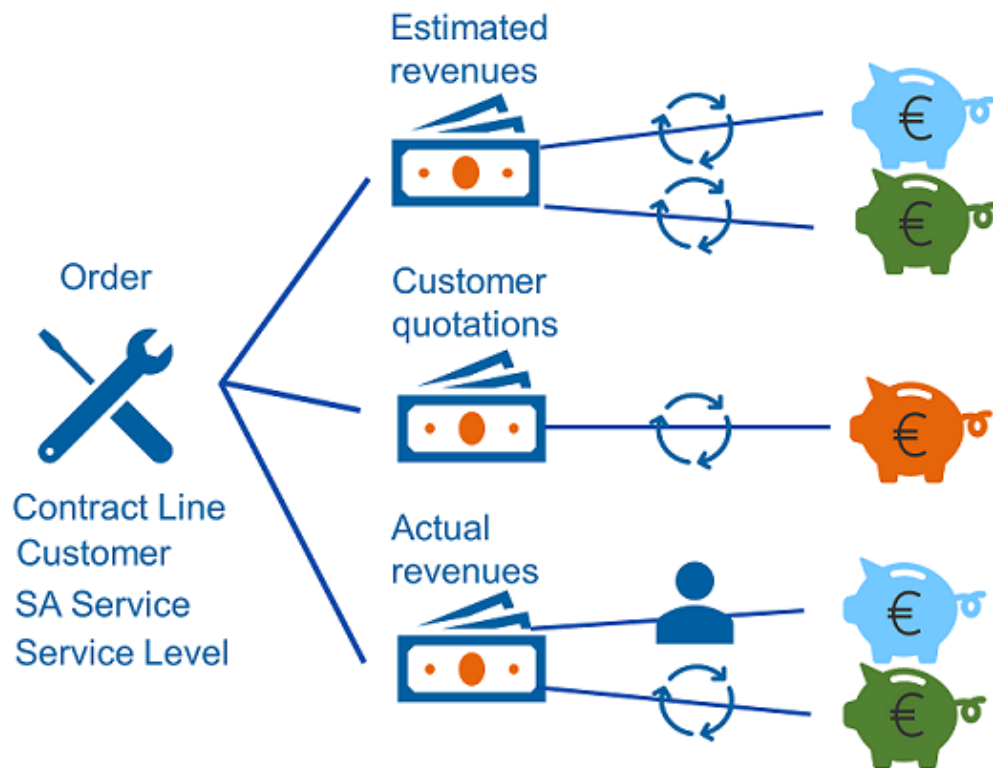
For more information on how to configure the order revenue generation, see [Defining order statuses for revenue calculation](#).

### Customer budget detection for revenues:

Planon will search for an applicable customer budget and update it accordingly in the following cases:

1. when [revenue estimation lines](#), [customer quotation lines](#) and order revenue lines are added;
2. when a customer quotation is added or updated;
3. when an order is updated;
4. when the quotation line type is changed.

 **Customer budgets** cannot be applied to Bonus-malus revenue lines.



Customer budgets are [automatically updated](#) (via budget transactions) with the estimated, committed and actual revenues from the corresponding lines. This way you always have an up-to-date view of the amounts and balances of your customer budgets.

## Revenue estimations and customer quotations

Based on contractual agreements between you as a service provider and your customer, the customer can require a revenue estimation or a customer quotation for (additional) services to be executed by you. For example, if the costs for the work exceed a certain threshold, the customer requires a revenue estimation and/or a customer quotation that they have to approve first before you can actually execute the work.

In this case, the customer knows what to expect and if costs are too high, they still can decide to cancel the order. As a service provider you can agree with your customer to provide *procurement* costs before starting the actual work on orders.

When an order is added or updated and a matching contract line is found, Planon checks if a customer quotation or revenue estimation is required. This is determined by the **Procurement type** [setting](#) in the general terms. You can choose between:

- **No procurement**
- **Revenue estimation**
- **Quotation**

If you select **Revenue estimation** or **Quotation**, the related order is automatically moved to another status: **Estimation required** / **Quotation required** (see [Configuring a procurement procedure](#)).

This way, the back-office is informed that revenue estimations and/or customer quotations are required before executing the work. After manually creating the [estimations](#) and/or [quotations](#) (usually by the contract manager), the quotations can be viewed, edited or approved/rejected by the customer via the [customer portal](#).

## Scopes types

The scope type of a budget definition plays an essential part in the process of automatically *detecting* the right budget when the back-office creates an order for a customer. It is necessary that each budget definition is linked to a specific *scope type*. Planon uses the scope type to compare data available on an order (added by the back-office), with information from the budget definition. When a match is found between the data on the order and the budget definition, the applicable budget can be auto-filled on the relevant order revenue lines, revenue estimation lines and/or customer quotation lines.

When you add a budget definition, you must select a scope type.


1. Asset (A)
2. Asset group (AG)
3. Space (S)
4. Space category (SC)
5. Property (P)\*
6. Service location type (Property) (SLT)
7. Contract line (CL)\*

A budget search through a budget scope type is performed *hierarchically*, prioritizing the search from the smallest element (**Asset**) to the largest (**Contract line**). So if an asset is filled in on the order and an 'asset-based' budget definition exists for the selected customer, the search stops and the matching budget is auto-filled on the relevant lines (order revenue lines, revenue estimation lines and customer quotation lines).



If no asset is found on the order, the search continues further in the scope range, from **Asset group** down to **Contract line**, until there is a match.

If multiple budgets are found for the same scope type, the search stops, but no budget will be populated on the related order lines, because all found budgets are applicable. In that case, you must manually select an applicable budget.

 **Property (5) and Contract line (7)** will ultimately always lead to a match, because these values are required on the order.

Next, depending on the scope type you select, you must link relevant records to the definition. For example if you selected an asset-based scope type, you link assets; if you defined a property-based type, you link properties, and so on.

Additionally, you can include more specific links to further refine the search scope mechanism. These links are also compared with information on the work order (per scope type), in the following sequence.

1. Service agreement service + Cost center + Service level
2. Service agreement service + Cost center
3. Service agreement service + Service level
4. Service agreement service

With a defined search based on scope type and the links, Planon can detect and auto-fill the correct customer budget on an order.

See [Adding customer budget definitions](#) for more information on the configuration.

## Service agreement services

When defining your internal organization in Planon, you start by setting up a comprehensive service catalog, with all the services on offer. In Planon, these are called *service agreement services* or SA services.

Services can be linked to a contract via a contract line, a [service agreement](#) or one of its subtypes.

Services can be linked to planned maintenance via activity definitions of all types, for example to a **Contract activity definition** or **Survey activity definition**. To establish the link, you can configure a **Service agreement service** reference field on the layout of the relevant type of activity definition.

 For more information about working with activity definitions in planned maintenance, see the topics about activity definitions in the *Planned maintenance* user documentation.

## Service components

As service provider, you deliver services to your customers at many different service locations and for many different types of assets (hard services). The objects for which

those services are delivered are called *service components*. The following service components can be registered in Planon:

- **Service location groups**
- **Service locations** (properties)
- **Space categories**
- **Spaces**
- **Asset groups**
- **Assets**

For more information on working with service components in the Service Providers solution, see [Adding service agreements](#).



For more information about registering the above-listed service components in Planon, see the user documentation on [Assets, Spaces & workspaces](#) and [Property details](#).

## Service level

In agreement with your customer, you can define various service levels for certain services. These service levels can be used to define specific terms per level and to generate KPIs and revenues accordingly. Example: the introduction of Gold, Silver and Bronze service levels.

When creating a service level, keep the following points in mind:

- You must define service levels per customer.
- You can create any number of service levels per customer.
- Based on the service levels defined for the customer, you can also define applicable service levels per contract line.
- You can define service levels on every type of term, except general terms.
- It is possible to set *one* of the service levels as a default for a customer (though this is not compulsory). However, if you define a default service level, the service level becomes mandatory on the corresponding order.

## Service locations

You can register the service location types and service locations of your customers. A service location is a physical location belonging to your customer and it must be unique to this customer. The location details will help you to locate and deliver better services to your customers.



A service location is the same as a property.

## Service terms - general and specific

The preconditions under which the services in a customer contract must be carried out are called *service terms*. The terms are of vital importance for cost and revenue calculations and will consequently also impact the invoicing process. In Planon, there are various types of service terms, that must be configured in a specific order:

- You start with defining the *General terms* for a service contract. These are service terms that apply to the whole contract. Therefore you must link them to the contract line.
- If applicable, you continue by defining any exceptions to the general terms, such as *Terms for time* (including bonus-malus terms), *Terms for travel* (to be combined with *Methods for travel terms*, see note below), *Terms for labor hours*, *Terms for materials* and *Terms for subcontractors*. These are special terms that must be linked to the service agreements to which they apply.

For more information on working with service terms, see [Adding general terms](#) and [Adding specific service terms](#).



Some service terms have additional configuration options for the calculation of revenues. You can configure:

- **Surcharge rates** for General terms and Terms for labor hours. See [Surcharges - general terms and labor hour terms](#)
- **Threshold groups** for the dynamic calculation of surcharges on Terms for materials and Terms for subcontractors. See [Threshold groups - material terms and subcontractor terms](#)
- **Methods for travel terms** by which you can control the way fixed travel revenues are calculated on the order: per day, per internal tradesperson, on the main order only and so on.

## Service provider

Service Providers are companies that provide full or partial business process outsourcing. Typically, this outsourcing includes non-core services off-site, such as administrative tasks, customer services, IT services and technical maintenance support.

## Subcontractors

A subcontractor is a third-party involved in carrying out (part of) the work ensuing from a customer contract. As a Service Provider, you are likely to outsource work to one or more specialized subcontractors. You may even have multiple agreements with individual subcontractors, covering the scope of work that they carry out. If your organization works with subcontractors, you can configure the necessary data in the **Subcontractors** TSI.

Similar as with your customer, you will also have one or more service contracts with your subcontractor(s). This contract is the legally binding part of the relation with the subcontractor. In addition, you will also enter into a framework agreement with the subcontractor, which is a 'handshake' agreement that includes all planned maintenance work that must be outsourced into a single batch to the subcontractor for a specific customer. Price negotiations for the outsourced maintenance activities are typically registered in this framework agreement. If your organization decides to work with framework agreements and subcontractor contracts, you can configure the necessary data in the **Outsourced maintenance proposals** TSI and **Subcontractor contracts** TSIs.



For more information on configuring the TSIs related to subcontractor data, see [Subcontractors](#).

## Threshold behavior

Service providers and their customers can make agreements on the maximum amounts that can be deducted from a customer budget (per order) by applying thresholds. The maximum threshold amounts that you apply to an order can be either be subtracted from the budget as a whole, or broken down by revenue type. By setting threshold behavior, you will ensure that amounts are not subtracted from the budget when they exceed the set thresholds.

Threshold settings can be made per budget definition. The settings are applicable per budget, per order 'cluster' (main order and suborders), and per *order revenue type* (depending on whether the 'specific' or the 'overall' threshold settings are selected).

The following threshold settings are available:

### Setting to determines if threshold behavior applies:

- Behavior at exceeded threshold

#### Threshold setting to subtract an overall amount:

- Threshold amount for Overall revenues

#### Threshold settings to subtract specific amounts per revenue type:

- Threshold amount for general revenues
- Threshold amount for labor hour revenues
- Threshold amount for materials revenues
- Threshold amount for travel revenues
- Threshold amount for subcontractor revenues



Once the budget definition is activated, you can no longer change the *threshold behavior* setting. However, it is still possible to increase / decrease the *threshold amounts*. If you adjust the amounts, and if there is at least one order revenue line linked to the budget, be aware that you will no longer be able to delete any existing values in the order's revenue lines, nor add new values.



For more information on the threshold behavior settings, see [Configuring threshold behavior](#) .

# Working with...

This section describes the various functions available.

## Adding customer budget definitions

A customer budget definition must be linked to a specific customer and one or more of their customer contract(s).

To add a [customer budget definition](#) with a relevant search [scope](#) and links that will refine the automatic detection of a budget, proceed as follows:

### Procedure

1. In the Customer budgets TSI, select the relevant customer and customer contract (line).
2. Go to the Customer budget definitions selection level.
3. On the action panel, click Add.
4. On the data panel, enter the required information.

For the field descriptions, see [Customer budget definition fields](#).



The scope type you select for the budget definition in the **Scope type** field is essential for the rest of the procedure. Once saved it can no longer be changed.

5. Click Save.
6. On the action panel, select the **Link contract lines** link action.
7. In the dialog, select a date and modification type, to add the contract line links.
8. Select the relevant contract lines you want to link.
9. Next, select the relevant 'scope type related' links, on the action panel.

The 'scope type related' links available on the action panel depend on which type you selected in the **Scope type** field:

- Link assets
- Link asset groups
- Link spaces
- Link space categories
- Link properties
- Link location types



The action panel automatically displays link actions for scope types that are actually used. In other words: the links related to scope types become available when you select a corresponding scope type.

10. In the dialog, select a date and modification type, to add the links.

**If relevant, use the available filter options:**

- **All:** This option is selected by default. It shows all existing records.
- **Applicable to contract lines:** This option only shows assets, properties or spaces (whichever applies) that are linked to the contract lines of the budget definition.

11. Select the relevant items you want to link (for example assets, spaces, properties) and click **OK**.

12. Similarly, on the action panel, add any *optional* links (not scope type related):

- Link cost centers
- Link service agreement services
- Link service levels

You have added a budget definition with a search scope and relevant links. Proceed with [Adding customer budgets](#).



The links that you add to a customer budget definition are 'time aware', similar to links that are used for contract lines and service agreements. See [Time aware links](#).



A customer budget definition should not have any overlaps in time and scope with existing customer budget definitions. So, when you add a new budget definition, it is recommended to run a scope overlap check. See: [Running the 'Check for scope overlaps'](#).

## Running the 'Check for scope overlaps'

You can run a **Check for scope overlaps** action on a customer budget definition. By selecting this 'step action', a check against all other customer budget definitions is done, to help you identify any overlaps in scope and time. The results are stored in a *log* on the [background action](#). If the action is not available on your action panel, ask your Planon administrator to make the **Check for scope overlaps** step action available on the action panel of the **Customer budget definitions** selection step. This can be done in TSIs > [Step actions](#).

### Procedure

1. In the TSI, select the relevant customer and contract.
2. Go to the Budget definitions selection level.
3. Select the customer budget definition(s) for which you want to do the **Check for scope overlaps**.

You can include a maximum of **5** budget definitions in the check. Each of the selected budget definitions will be checked for overlaps against **all** other possible overlapping budget definitions.

4. On the action panel, select the **Check for scope overlaps** action.  
**A background action is started.**
5. On the navigation panel, select the **Background actions** TSI.
6. Select the background action you just started, when it is completed.
7. On the data panel go to the **Log** tab and view the information.

The log informs you if any overlaps were found and if so, how many budget definitions are involved. These are displayed directly below, each with details where the scope overlaps are. For example: in the (M:n) links to **Contract lines** or **Service agreement services**.

If required, you can now update the selected budget definition(s), based on the information from the log. Removing the overlaps will prevent any problems with the detection of budgets.

## Adding customer budgets

To add a [customer budget](#) to a budget definition, proceed as follows:

### Procedure

1. In the Customer budgets TSI, select the customer budget definition to which you want to add a budget.
2. Go to the Customer budgets selection level.
3. On the action panel, click Add.
4. On the data panel, enter the budget data.

See [Customer budget fields](#) for more information on filling in this data.

5. Click Save.

The budget is added to the budget definition. If you have allowed recurring budgets on the budget definition, you can proceed by adding multiple budgets to the selected budget definition, provided they have no overlap (see [Customer budget fields](#) > Allow recurring budgets? field). If you want to use [Budget periods](#) for a budget, proceed with [Adding customer budget periods \(optional\)](#).

## Adding customer budget periods (optional)

If you want to monitor a budget more closely and frequently, you can add a relevant number of [budget periods](#) to a budget, with the following procedure.



## Procedure

1. Go to the Customer budget details > Customer budget periods.
2. On the action panel, click Add.
3. On the data panel, enter the required information.

For information on the available fields, see [Budget periods fields](#).

4. Click Save.

## Configuring threshold behavior

You can define budget threshold settings for your customer budgets, and thus determine *how* amounts (the various types of order revenues) should be subtracted from the selected customer budget.

Configure the [threshold behavior](#) as follows:

### Procedure

1. In the Customer budgets TSI, go to Budget definitions and select the required customer budget definition record.

**Precondition:** the customer budget definition is not yet activated.

2. On the data panel, in the General > Threshold section, enter data in the relevant threshold-related fields. See Customer budget definition fields.
3. In the Behavior at exceeded threshold field, select the relevant option:
  - **Subtract complete amount from budget** > no thresholds will be applied
  - **Do not subtract complete amount from budget** > thresholds will be applied when deducting amounts



Once the budget definition is activated, you can no longer change the *threshold behavior* setting. However, it is still possible to increase / decrease the *threshold amounts*. If you adjust the amounts, and if there is at least one order revenue line linked to the budget, be aware that you will no longer be able to delete any existing values in the order's revenue lines, nor add new values.

4. If you chose the option to apply thresholds, proceed with setting the relevant amounts as specified in step 5 or 6.
5. If you want to set a threshold amount for the order's revenues as a whole, fill in an amount in the Threshold amount for Overall revenues field. Or ...,
6. If you want to specify threshold amounts per *order revenue type*, fill in amounts in the applicable 'specific' thresholds amount fields: General, Labor hours, Travel, Materials and/or Subcontractor.



If you select the option **Threshold amount for Overall revenues**, the specific threshold amount fields become unavailable / will be cleared. If you select one or more of the specific options, the **Threshold amount for Overall revenues** field becomes unavailable. If the field already contains a value, it will be cleared.

7. Click Save.



For more information on the back-office operations with regard to order revenues see [Order revenues](#).

Once you are satisfied that the budget definition is configured to your requirements you can set its status to **Active**.

## Adding modifications to a customer budget

If you want to adjust a budget amount for an active customer budget, you can add a budget modification. On approval of the budget modification, the amount on the budget will be updated.

Use the following procedure to add a customer budget modification for an active budget:

### Procedure

1. Go to the Budget details > Budget modifications step.
2. On the action panel, click Add.
3. Complete the fields in the data panel.

For information on the available fields, see [Budget modification fields](#).

4. Click Save.

A newly created modification always has the **Initial** status. It can then be sent for approval where the status changes to **Approval requested**. After it is verified by the respective personnel and approved, the status changes to either **Approved** or **Rejected**. Approval requested and rejected modifications can be reset to the **Initial** status. **Rejected** modifications can also be reset to **Approval requested**.

## Deep copying customer budget definitions

Deep copying is the process of copying a customer budget definition together with one or more selected associated items.

When deep copying, associated items such as modifications, linked budgets, linked periods, and selected links can also be copied.



- The copied budgets and periods will get the **Initial** status.

- Only **Initial amount** field values of budgets and periods are copied.

### Procedure

1. Go to Customer budget definitions selection level and select the customer budget definition you want to deep copy.
2. On the action panel, click Deep copy.

The **Copying** dialog box appears.

3. Select the required option from the dialog box and then click OK.

Some facts about deep copying:

- All deep copy items are selected by default and the copy date is pre-filled. You can edit these fields.
- If you clear the **Budget** check box, the **Periods** check box is also cleared.
- When you copy a customer budget record, only the check boxes that are valid for the copy action are shown in the **Copying** dialog box.

## Recalculating budget period amounts

In cases where recalculation of budget (period) amounts is required, the system will automatically update the amounts via budget transactions. However, in exceptional cases it might be necessary to *manually* recalculate budget period amounts, by using an action on your action panel.

**Example:** You have a budget that is already activated, but retrospectively decide to add **budget periods** to the budget. Other scenarios might be conceivable, but these will not be covered here.

### Procedure for this scenario

1. In , navigate from the relevant Customer, Contract (line) and Budget definition to the Budgets selection level.
2. Select the *activated* budget to which you want to retrospectively add budget periods.
3. Navigate to Budget details > Budget periods.
4. Add the required number of budget periods.

See [Adding customer budget periods \(optional\)](#) and [Budget periods fields](#) for the procedure and the field descriptions.

The system runs checks for existing orders and any linked revenues related to the budget, and will calculate the budget period amounts accordingly, via budget transactions. *If, at this point, budget data is updated at the very same time, the budget transactions might miss that update.*

5. In **Background actions**, check the error log for failed budget transactions.
6. If there are failed transactions, return to Budget details > Budget periods and select the relevant period(s).
7. On the action panel, click Recalculate period amounts.

**The budget period amounts are recalculated and updated.**



For the recalculation of budget period amounts, you are advised to choose a time when there is little or no chance that other users will change budget data.

# Customer budgets and back-office operations

When **Budget definitions**, **Budgets** and **Budget periods** have been configured and activated for a customer contract, the back-office can directly benefit from the *automatic budget detection* feature when adding / generating:

- **Orders;**
- **Order revenue lines;**
- **Revenue estimations;**
- **Customer quotations.**

The configuration of *Scope types* and the *Applicable revenue* settings on the budget definition, ensures that the system can detect and fill in the right budget for the items listed above. As a budget definition is 'life cycle aware', this happens on the condition that a matching budget exists at the **Original start date-time** of the order.

Once a budget is detected and filled in, the various budget amounts are automatically (re)calculated with each action that affects the budget, such as field changes, status changes, record deletion and so on.



To determine the applicability of any revenue types (General, Labor hours, Materials, Travel and so on) on the budget calculations, the **Original start date-time** of the order is decisive.

The Planon application takes care of the calculations via a mechanism called '[Budget transactions](#)', which can be monitored on the corresponding selection step in the Customer budgets TSI. See [Events triggering customer budget transactions](#) for more detailed information.

## Further reading about back-office operations

The [Service providers - Back-office operations](#) part of the documentation focuses on the back-office operations that are typical for the **Service Providers** solution.

Since many of the back-office operations in Planon ProCenter are about the registration and processing of the revenues that ensue from contractual work (both from customer contracts and from subcontractor contracts), the main TSI that is used is the Work Orders TSI.

The following topics deal with the various processes in and around that TSI:

- [Adding an order - automatic detection of applicable contract line](#)
- [Adding revenue estimation lines](#)
- [Adding customer quotations](#)
- [Applying terms for time \(KPIs\) to orders](#)

- Order revenues
- Configuring 'Customer quotation' workflows for the customer portal
- Subcontractor lines

# Field descriptions

The following section(s) describe(s) the fields, their purpose and meaning.


## Customer budget definition fields

---

Field	Description
Actual end date	Enter the actual end date of the customer budget definition.
Actual start date	Enter the actual start date of the customer budget definition.
Allow recurring budgets?	<p>Specify if you want to allow multiple, recurring budgets to be created on this budget definition, or not.</p> <p>If you select <b>Yes</b>, you can add multiple budgets to the budget definition. In that case it is mandatory to fill in a start date and end date on the budgets. The start and end dates of the different budgets must not overlap.</p> <p>If you select <b>No</b>, you can only add one budget. In that case, the budget does not require an end date.</p>
Behavior at exceeded threshold	<p>Select the relevant type of budget calculation to be applied when a set threshold amount is exceeded:</p> <ol style="list-style-type: none"><li>1. <i>Subtract complete amount from budget</i> - basically, with this setting, no threshold applies.</li><li>2. <i>Do not subtract complete amount from budget</i> - the whole amount has to be invoiced separately and is not subtracted from the budget.</li></ol> <p>Option 1 is the default value.</p>
Budget manager	Select the responsible budget manager. This field is subject to the life cycles of the budget definition, implying its value can change over time (per life cycle).
Code	Enter a unique code for the customer budget definition.

Field	Description
Customer	Displays the name of the customer to whom the budget definition is linked.
End date	Displays the date when the current life cycle of the customer budget definition ended.
Name	Enter a name for the customer budget definition.
Scope type	Select a relevant scope type for the corresponding customer budget definition. See <a href="#">Scopes types</a> for more information.
Start date	Displays the date when the current life cycle of the customer budget definition started.


### Applicability of revenue types

 Applicability fields are subject to the life cycles of the budget definition. This means that it is possible to change the values over time (per life cycle).

General revenues applicable?	Select <b>Yes</b> if general revenues should be used as search criterion in the budget detection on <b>Order revenue lines, Customer quotation lines</b> and <b>Revenue estimation lines</b> . Select <b>No</b> if they should not.
Labor hour revenues applicable?	Select <b>Yes</b> if labor hour revenues should be used as search criterion in the budget detection on <b>Order revenue lines, Customer quotation lines</b> and <b>Revenue estimation lines</b> . Select <b>No</b> if they should not.
Materials revenues applicable?	Select <b>Yes</b> if materials revenues should be used as search criterion in the budget detection on <b>Order revenue lines, Customer quotation lines</b> and <b>Revenue estimation lines</b> . Select <b>No</b> if they should not.
Subcontractor revenues applicable?	Select <b>Yes</b> if subcontractor revenues should be used as search criterion in the budget detection on <b>Order revenue lines, Customer quotation lines</b> and <b>Revenue estimation lines</b> . Select <b>No</b> if they should not.
Travel revenues applicable?	Select <b>Yes</b> if travel revenues should be used as search criterion in the budget detection on <b>Order revenue lines, Customer quotation lines</b> and <b>Revenue estimation lines</b> . Select <b>No</b> if they should not.


### Threshold amount settings (optional)



Field	Description
 Threshold amount fields are subject to the life cycles of the budget definition. This means that it is possible to change the values over time (per life cycle).	
Threshold amount for general revenues	If relevant for the selected order, enter the amount that will be the threshold for the general revenues on the order (including the suborders). If you update this or any of the other specific threshold amount fields, the <b>Threshold amount for Overall revenues</b> field will be cleared.
Threshold amount for labor hour revenues	If relevant for the selected order, enter the amount that should serve as the threshold for any labor hour revenues on the order (including the suborders). If you update this or any of the other specific threshold amount fields, the <b>Threshold amount for Overall revenues</b> field will be cleared.
Threshold amount for materials revenues	If relevant for the selected order, enter the amount that should serve as the threshold for any materials revenues on the order (including the suborders). If you update this or any of the other specific threshold amount fields, the <b>Threshold amount for Overall revenues</b> field will be cleared.
Threshold amount for subcontractor revenues	If relevant for the selected order, enter the amount that should serve as the threshold for any subcontractor revenues on the order (including the suborders). If you update this or any of the other specific threshold amount fields, the <b>Threshold amount for Overall revenues</b> field will be cleared.
Threshold amount for travel revenues	If relevant for the selected order, enter the amount that should serve as the threshold for any travel revenues on the order (including the suborders). If you update this or any of the other specific threshold amount fields, the <b>Threshold amount for Overall revenues</b> field will be cleared.
Threshold amount for Overall revenues	Enter the amount that will be the threshold for the overall revenues on the order (including the suborders). If you update this field, all specific threshold amount fields will be cleared.

## Customer budget fields

Field	Description
<b>General</b>	

Field	Description
 Most <b>Customer budget</b> fields are only editable if the budget has the <b>Initial</b> status.	
Budget definition	Displays the linked budget definition.
Code	Enter a budget code. This budget code must be unique.
End date	Displays the end date of the customer budget. This field is editable if the budget has the <b>Initial</b> status.
Start date	Displays the default start date of the customer budget.
Status	Displays the status of the selected customer budget.

#### Amount fields involved in updating the budget (via transactions)

Initial amount	The original amount set when the budget is created.
Budget amount	Displays the current amount of the budget. This amount only differs from the initial amount if there has been a budget modification to increase or decrease the budget.
Total actual amount	This read-only field displays the amount only from order revenue lines linked to an Order in the <b>Administratively completed</b> status.
Total committed amount	This read-only field displays the amount only from order revenue lines linked to an Order where the status is not <b>Administratively completed</b> or <b>Cancelled</b> .
Total estimated amount	This read-only field displays the amount only from order revenue estimation line (after any revenue line amounts) linked to an Order where there is no <b>Completed</b> or <b>Accepted</b> customer quotation.
Total accepted quotation amount	This read-only field displays the amount only from customer quotation line (after any revenue line amounts) linked to an Order where the quotation status is <b>Accepted</b> .
Total completed quotation amount	This read-only field displays the amount only from customer quotation line amounts (after any revenue line amounts) linked to an Order where the quotation status is <b>Completed</b> .

---

Field	Description
Lower limit for threshold exceeded?	This read-only field indicates if the <i>lower limit</i> threshold of the budget is exceeded, or not. If it is exceeded, <b>Yes</b> is selected. In that case, the remaining budget has fallen below the lower limit and action may be required. The value specified in either <b>Amount threshold - lower limit</b> or in <b>Percentage threshold - lower limit</b> plays a part in determining when a budget overrun is reached.
Amount threshold - lower limit	The amount entered in this field is used to determine if the lower limit threshold is exceeded. This field is editable in all budget statuses.
Percentage threshold - lower limit	The percentage entered in this field is used to determine if the lower limit threshold is exceeded. This field is editable in all budget statuses.

### Balance fields

Actual balance amount	<p>Displays the budget's current balance based on actual budget increases / decreases (actual amounts).</p> <p>Actual balance amount = Budget amount - Total amount actual</p>
Committed balance amount	<p>Displays the budget's current balance for committed amounts / completed quotations.</p> <p>Committed balance amount = Balance amount actual - Total amount committed - Total quotation amount accepted</p>
Estimated balance amount	<p>Displays the budget's current balance for estimated amounts / accepted quotation amounts.</p> <p>Estimated balance amount = Balance amount actual - Total amount committed - Total amount estimated - Total quotation amount completed</p>

---

## Budget periods fields


---

Field	Description
Budget	Displays the customer budget to which the budget periods are added.
Start date	Enter a start date for the budget period.

Field	Description
End date	Enter an end date for the budget period.
<b>Amount fields</b>	
Initial amount	The original amount set when the budget is created.
Period amount	Displays the current amount of the budget period. This amount only differs from the initial amount if there has been a budget modification to increase or decrease the budget.
Previous period remaining amount	Displays the actual balance amount from the previous customer budget period.
Total period amount	Displays the current amount of the budget period, that is the total period amount + the remaining amount for this period.
Total actual amount	This read-only field displays the amount only from order revenue lines linked to an Order in the <b>Administratively completed</b> status.
Total committed amount	This read-only field displays the amount only from order revenue lines linked to an Order where the status is not <b>Administratively completed</b> or <b>Cancelled</b> .
Total estimated amount	This read-only field displays the amount only from order revenue estimation line (after any revenue line amounts) linked to an Order where there is no <b>Completed</b> or <b>Accepted</b> customer quotation.
Actual balance amount	Displays the budget's current balance based on actual budget increases / decreases (actual amounts).  Actual balance amount = Budget amount - Total amount actual
Committed balance amount	Displays the budget's current balance for committed amounts / completed quotations.  Committed balance amount = Actual balance amount - Total committed amount - Total quotation amount accepted
Estimated balance amount	Displays the budget's current balance for estimated amounts / accepted quotation amounts.

Field	Description
	Estimated balance amount = Actual balance amount - Total committed amount - Total estimated amount - Total completed quotation amount

## Budget modification fields

Field	Description
Code	Enter a code for the customer budget modification.
Name	Enter a relevant name for the customer budget modification.
Amount	Specify the amount that you want to change.
Budget	Select the budget for which the modification is needed.
	<div style="border: 1px solid #00a0e3; padding: 5px; display: inline-block;">  You can only select budgets with <b>Active</b> or <b>Blocked</b> statuses.         </div>
Approval date	Displays the date on which the customer budget modification was approved.
Effective date	Displays the date from which the modification applies.
Original amount	Displays the amount before the modification was made.
New amount	Displays the updated budget amount.

## Budget transaction fields

Customer budget transaction fields are solely meant for monitoring any updates on customer budgets (amount and balance related fields). The transaction records are generated automatically and non-editable. Transactions on customer budgets are 'triggered' by status changes, field changes and other events on orders and order related elements such as **Order revenues**, **Customer quotation lines** and **Revenue estimation lines**.

Field	Description
Amount	Displays the amount processed by the transaction.
Budget	Displays the budget for which the transaction is created.

Field	Description
Budget increase?	This field indicates whether or not the transaction updates (adds / subtracts) corresponding amounts on the budget and/or on any affected budget periods.
Order	Displays the order for which the transaction is created. Good to know: if the transaction covers changes on main order and suborder(s), the main order is referenced here.
Period	Displays the budget period to which the transaction applies and whose amount fields are updated if the budget period is affected by the transaction.
Transaction amount type	<p>Displays what kind of transaction amount is being processed. The following types exist:</p> <ul style="list-style-type: none"> <li>• Actual</li> <li>• Committed</li> <li>• Estimated</li> <li>• Quotation accepted</li> <li>• Quotation completed</li> </ul> <p>The above types will update the corresponding <i>amount</i> fields on the budget (add, subtract or clear amounts):  <b>Total actual amount, Total committed amount, Total estimated amount, Total accepted quotation amount and Total completed quotation amount.</b></p>
Transaction type	<p>Displays what kind of transaction is being processed. The following types exist:</p> <ul style="list-style-type: none"> <li>• Set period value only</li> <li>• Update budget only</li> <li>• Update budget and period</li> <li>• Update period only</li> </ul> <p>The above types will update the corresponding <i>amount</i> fields on the budget and / or the budget period.</p>

## Events triggering customer budget transactions

The customer budget transactions and ensuing budget (re)calculations are triggered by field changes and status changes on the *order* and also by field changes and/or status changes on *order-related* business objects, such as revenue estimations, customer quotations and order revenues.


The following table lists several common events generating budget transactions.




Note that the listed examples are just simple cases, without multiple simultaneous changes to other lines involved.

Business object	Back-office change	Update on Budget definition
<b>Revenue estimation line with a reference to a customer budget</b>	Action <b>Add revenue estimation</b>	Updates field: <b>Total estimated amount</b>
	<div style="border: 1px solid black; padding: 5px;"> <p><i>Field changes</i> on amount fields can also result in amount updates. For example at: <b>General revenue estimations</b> and/or revenue estimations for <b>Labor hours, Materials</b> or <b>Subcontractors</b>.</p> </div>	
<b>Customer quotation line activated and with a reference to a customer budget</b>	Status change to <b>Accepted</b>	Updates field: <b>Accepted total quotation amount</b>
	Status change to <b>Completed</b>	Updates fields: <b>Total estimated amount</b> <b>Completed total quotation amount</b>
	<div style="border: 1px solid black; padding: 5px;"> <p><i>Field changes</i> on amount fields can also result in amount updates. For example changes on: <b>General quotation lines</b> and/or quotation lines for <b>Labor hours, Materials</b> or <b>Subcontractors</b>.            Changing the <b>Quotation line type</b> can also trigger a recalculation.</p> </div>	
<b>Order revenue lines invoiceable and with a reference to a customer budget</b>	Action <b>Add order revenue</b>	Updates field: <b>Total committed amount</b>
	<div style="border: 1px solid black; padding: 5px;"> <p><i>Field changes</i> on amount fields can also result in amount updates. For example changes on: <b>General revenues</b> and/or revenues for <b>Labor hours, Travel, Materials</b> or <b>Subcontractors</b>.</p> </div>	

Business object	Back-office change	Update on Budget definition
Order	Status change to <b>Administratively completed</b>	Updates field: <b>Total actual amount</b>  Clears fields: <b>Total committed amount</b> and <b>Total estimated amount</b>

 Field changes, for example on start and end dates, can also result in amount updates.

 For information on the fields of **Customer budget transactions**, available on the **Details** selection level or on the **Period details** selection level, see: [Budget transaction fields](#).



# Index

## B

- Budget period
  - customer budget 35
  - fields 35
- Budget period amounts
  - recalculate 27
- Budget periods
  - start and end date 9
- Budget transaction
  - customer budget 37
  - read-only fields 37
  - triggered by actions / changes on the order 37

## C

- Check for scope overlaps
  - customer budget definition 23
  - step action 23
- concepts 8
- Contract line type
  - edit 12
  - non-contractual work 12
  - preventive 12
  - proactive 12
  - special 12
  - standard 12
- Customer budget
  - Amount fields 33
  - modification 10
  - modify 26
  - Transaction triggering 33
- Customer budget definition
  - deep copy 26
- Customer budget definitions
  - add 22
  - check for scope overlaps 8
  - life cycle aware 8
  - scope 8
  - status 8
  - user-defined business object 8
- Customer budget period
  - add 24
- Customer budget scope

- budget detection 16
  - define 16
  - hierarchy 16
  - scope subtypes 16
- Customer budgets 14
  - add 24
  - back-office operations 29
  - introduction 6
  - status
    - transfer to archive 8
- Customer budgets- transactions
  - due to field change 10
  - due to status change 10
- Customer contract
  - definition 12
  - enable History 12
- Customer contract line
  - SLA amount 12
- Customer quotations 15
  - add 29

## E

- Estimations 15

## F

- Field change
  - triggers for customer budget transactions 38
- Field descriptions 31

## L

- Life cycle
  - Customer budget definition 14

## M

- Methods for travel terms 19

## O

- Order revenues 14

## R

- Revenue estimations 15
  - add 29
- Revenues 15
  - generate 29
  - process 29
- Roles and process in Customer budgets

manual processes 7  
system triggered / automatic  
processes 7

## S

Service agreement service  
link to contract line 17  
link to maintenance activity definition  
17  
SA service 17  
Service component 17  
Service level 18  
Service location 18  
Service location type 18  
Service provider  
concept, definition 19  
Customer 13  
Service terms  
definition 19  
general 19  
specific 19  
Specific service terms  
for labor hours 19  
for materials 19  
for subcontractors 19  
for time 19  
for travel 19  
Status change  
customer budget transaction 10  
triggers for customer budget  
transactions 38  
Subcontractor  
definition 19  
TSIs 19

## T

Terms  
Service Providers 19  
Threshold behavior  
configure 25  
Subtract complete amount from  
budget 25  
Threshold behavior upon exceeding  
settings  
TSIs required for Customer budgets 6

## W

Working with... 22