



Slide 1

Slide notes: What is a Customer Sales Budget? It is in fact an expansion of an existing Income Budget on a GL Account.

Budget by Customer

- A standard Income Budget for a Ledger Account can be expanded to a Budget by Customer
- Budgeting can be performed for some Customers only, with the balance viewed as “Other Customers”

Budget by Customer

Slide notes: The Customer Budget does not replace the normal Budget. Instead, it is in addition to the normal Budget, where we can budget for Income from specific Customers, and without having to budget for ALL Customers. In other words, the balance that we do not budget for specifically, becomes the so-called 'Other Customers'.

An Example Income Account

Budget for Income Account: 10101032 Discharge Full 20 foot		
Jul-07	Financial	Physical
Customer A	-10,000.00	200.00
Customer B	-20,000.00	350.00
Other	-30,000.00	600.00
Total	-60,000.00	1,150.00

An Example Income Account

Slide notes: And here we look at an example, for the Period July 2007, on an Income Account. So what we have is that for Customer A we budget Sales of \$10,000 and 200 Physical Units, while for Customer B we budget Sales of \$20,000 and 350 Units. Since the Actual Budget for the Account is \$600,000, the difference becomes 'Other Customers', i.e. the remainder that we do not specifically indicate from which Customers we expect these Sales to come.

How Customer Budget is measured

- The Customer Budget is measured from Retail Invoices processed, by Customer
- The Results can be measured with DocWriter for reporting with standard template functions

How Customer Budget is measured

Slide notes: The measurement against the Customer Budgets are based on Retail Invoices that measure Sales by Customer. The results can also be measured in DocWriter Reports, where standard Template Functions are provided for this purpose.

