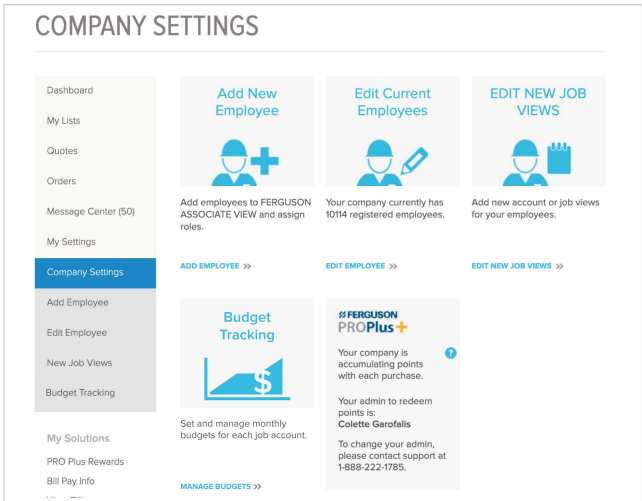


Introducing the New Budget Tracking Tool

Navigate the Budget Tracking Tool

Located in Company Settings on your ferguson.com Dashboard, Budget Tracking allows you to easily track your monthly spend.



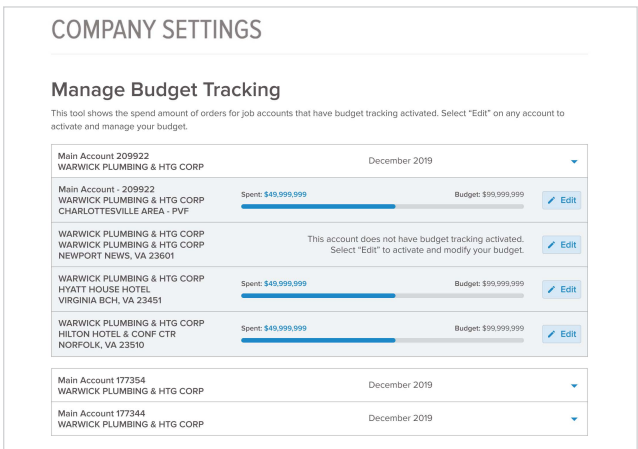
This Budget Tracking tool allows you to:

- Set and manage monthly spend targets for each job account.
- Assign a budget administrator who sets/edits target amounts and receives notifications via Message Center when order(s) placed reach 80% of budget or if reaches 100% of budget in a given day.
- View monthly budget amounts 12 months out.
- Edit monthly budgets quickly and easily.
- Click on the amount spent to view associated purchases.

The Account Admin assigns the budget administrator(s). Any person serving as an admin on the account can be assigned as the budget administrator.

Manage Budget Tracking

The Manage Budget Tracking tool displays the spend amount of orders for job accounts that have budget tracking activated.



Within the tool, you can:

- View the individual order spend amount.
- Quickly activate and manage your budgets.
- Edit existing budgets.

The date an order is needed determines which month's budget a purchase will apply to.

Manage Budget Tracking cont.

COMPANY SETTINGS

Manage Budget Tracking

This tool shows the spend amount of online and offline orders for job accounts that have budget tracking activated. Select "Edit" on any account to activate and manage your budget.

Main Account 209922
WARWICK PLUMBING & HTG CORP

December 2019

Main Account - 209922
WARWICK PLUMBING & HTG CORP
CHARLOTTESVILLE AREA - PVF

Spent: \$49,999,999

Budget: \$99,999,999

Edit

WARWICK PLUMBING & HTG CORP
WARWICK PLUMBING & HTG CORP
NEWPORT NEWS, VA 23601

This account does not have budget tracking activated.
Select "Edit" to activate and modify your budget.

Edit

WARWICK PLUMBING & HTG CORP
HYATT HOUSE HOTEL
VIRGINIA BCH, VA 23451

Spent: \$105,999,999

Budget: \$99,999,999

Edit

WARWICK PLUMBING & HTG CORP
HILTON HOTEL & CONF CTR
NORFOLK, VA 23510

Spent: \$85,999,999

Budget: \$99,999,999

Edit

Main Account 177354
WARWICK PLUMBING & HTG CORP

December 2019

Main Account 177344
WARWICK PLUMBING & HTG CORP

December 2019

With this tool, you can easily track the progress of a specific account budget to the total budget target.

A budget line will automatically turn red when the budget target is exceeded.

Orders Placed this Period ⓘ

Main Account - 209922
WARWICK PLUMBING & HTG CORP
CHARLOTTESVILLE AREA - PVF

Order	Job Name	PO#	Total
WF859487 12/19/2019	1234	1234	\$24,999.00
WF859487 12/19/2019	1234	1234	\$18,101.00
WF859487 12/19/2019	1234	1234	\$37,910.00
WF859487 12/19/2019	1234	1234	\$109,772.00

By clicking on the spend amount in blue, you can view a list of the orders placed within the current budget period.

Edit Budget

Edit Budget

Main Account - 209922
WARWICK PLUMBING & HTG CORP
CHARLOTTESVILLE AREA - PVF

Activate Budget Tracking

Budget Administrator

Billy Colonna

The budget administrator will be notified when the spent amount reaches 80% of the budget or exceeds the budget amount.

Month

Budget Amount

December


\$99,999,999

January

\$1,000,000

Edit budget allows you to:

- Activate budget tracking for a specific main or job account.
- Edit the monthly spend targets.
- Assign a budget administrator to manage the monthly budget spend.

 **FERGUSON**

Message Center

Dashboard

My Lists

Quotes

Orders

Message Center (53)

My Settings

Company Settings

My Solutions

PRO Plus Rewards

Bill Pay Info

View Bills

Resources

Ideas & Learning Center

Search Solutions

MESSAGE CENTER

Unread Messages (53 messages) [Mark All As Read](#)

You have a quote [WB009268, SAFETY, SAFETY COMING SOON] to review. [VIEW QUOTE >>](#)

Apr 02, 2020 [Mark As Read](#)

WARWICK PLUMBING & HTG CORP, HYATT HOUSE HOTEL, VIRGINIA BCH, VA 23451 has exceeded 80% of the budget amount for the March 2020 period. [VIEW BUDGET TRACKING >>](#)

Mar 31, 2020 [Mark As Read](#)

You have access to job account [INDUSTRIAL (TESTING ACCT)].

Mar 31, 2020 [Mark As Read](#)

You have access to job account [INDUSTRIAL-PVF VIEW].

Mar 31, 2020 [Mark As Read](#)

You have a quote [WB014009, Restoration Batteries & Electrical] to review. [VIEW QUOTE >>](#)

Mar 31, 2020 [Mark As Read](#)

You have a quote [WB060884, COAST TROP 300] to review.

Mar 30, 2020

The budget administrator will receive updates on orders reaching 80% or 100% of budget via Message Center in the Dashboard. A message will automatically be sent when a purchase will send the spend over 80% of the set budget and when the spend will exceed 100% of the budget target. Messaging only applies to those main/job accounts that have budget tracking activated.

Purchaser View

! Budget Exceeded

×

Placing this order will cause the Budget for this period to be exceeded. Are you sure want to place this order?

Budget Admin: Billy Colonna

Cancel

Place Order

The purchaser and approvers for orders setup for Order Approval will receive this pop-up message when they are placing an order that will exceed the budget target. The name of the budget admin will be listed in this message if you need to contact them to resolve the exceeded budget.