

# Overview of Budgets in Onit

When it comes to storing budget and spend information, Onit is able to do so at either the overall-level (life of the matter), or monthly, quarterly, or yearly. Within any of these time ranges, Onit can optionally further break up the data by fees versus expenses or they can be grouped together.

For granular budgeting (life-of-matter, annual, quarter, etc.), there are a number of configuration tasks that you should usually complete. Some of the below are a few hard-fast rules, while others are general recommendations/ FYIs that you should be aware of.

## Apps Involved in Budgeting

Budgeting in Onit involves the cooperation of many different Apps. Below is a simplified breakdown of the important Apps in budgeting:

### Matter

A Matter App Record represents one matter. Vendors and budgets can be assigned to the matter and invoices can be billed against the matter.

### Vendor

A vendor Record represents one vendor in BillingPoint that can be assigned to a matter. Once a vendor is assigned to a matter Record a Matter/Vendor Record will be created in the **Vendor Assignment to Matters** App.

### Budget

You can imagine the Records in this App as folders. Each budget 'folder' holds a varying number of child Records inside called **Budget Details**. Each budget detail Record represents either a period of time (e.g., month, quarter, year) or fees or expenses on the life of the matter.

## Vendor Assignment to Matters

Records in the **Vendor Assignment to Matters** represent vendor matter pairings. Once a vendor has been assigned to a matter a Record will be created here.

### **\_total vs \_amount Fields:**

In the **Vendor Assignment to Matters** App, there are a set of Fields containing **\_total** in their name and another set containing **\_amount** in their name. It's important to understand the differences between these two sets.

Any Field that has **\_total** in its name is aimed at the client. These Fields ultimately get their values from the child **Budget** App. These Fields are intended to reflect the internal-facing budget values for the client, which may or may not be appropriate to show to the vendor in BillingPoint.

Any Field that has **\_amount** in its name is aimed at the vendor. If you need to show a different budget value to the vendor than the client tracks internally, use the **\_amount** Fields to achieve this.

**Note:** Using the out-of-the-box plumbing in Gold, the **budget\_amount\_vendor\_currency** Field is the only budget value that will be sent to the BAR in BillingPoint.

Overall, it is the App Builder's job to ensure that these values are set correctly and that they appropriate values are displayed to the client in Onit.