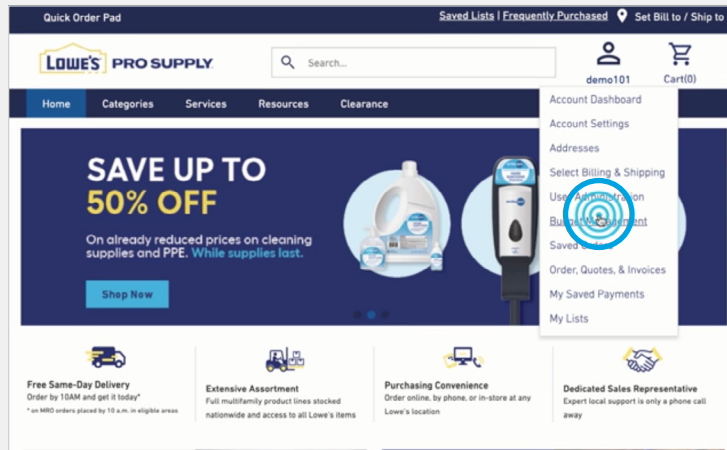


# BUDGET MANAGEMENT



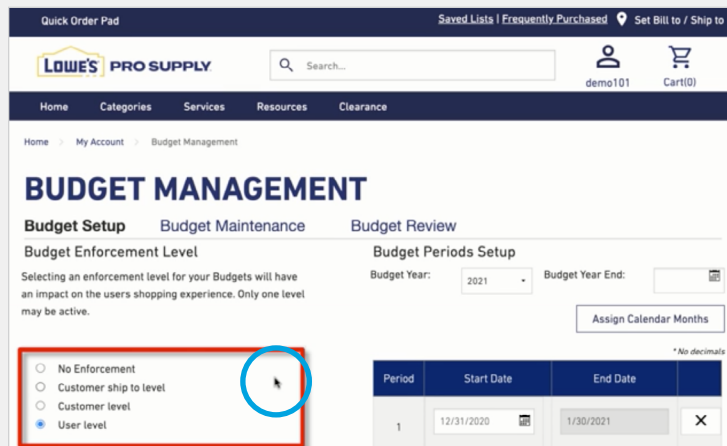
With the Budget Management feature, it's easy to set budget controls on your Lowe's Pro Supply account.

- Easily access and set budget controls
- Manage by customer, address or user
- View current and past spending



1

To get started, use the pull-down menu on your account icon and select Budget Management.



2

Only one Budget Enforcement Level may be active on your account, and each one affects the user's shopping experience in a different way — so choose the one that works best for you based on these considerations:

## ONLINE GUIDE

# BUDGET MANAGEMENT



**BUDGET MANAGEMENT**

**Budget Setup** Budget Maintenance Budget Review

**Budget Enforcement Level**

Selecting an enforcement level for your Budgets will have an impact on the users shopping experience. Only one level may be active.

☐ No Enforcement  
☒ Customer ship to level  
☐ Customer level  
☐ User level

**Budget Periods Setup**

Budget Year: 2021 Budget Year End: 1/30/2021

Assign Calendar Months

Period	Start Date	End Date
1	12/31/2020	1/30/2021

3

The Customer level is the broadest level for budget setup, incorporating all ship-tos and users under a single overarching budget.

**BUDGET MANAGEMENT**

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**Budget Periods Setup**

Budget Year: 2021 Budget Year End: 1/30/2021

Assign Calendar Months

Period	Start Date	End Date
1	12/31/2020	1/30/2021

4

At the Customer ship to level, each address must have its own budget set up, and everyone who makes purchases under that address is subject to the overall budget.

## ONLINE GUIDE

# BUDGET MANAGEMENT



**BUDGET MANAGEMENT**

**Budget Setup** Budget Maintenance Budget Review

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☐ No Enforcement  
☐ Customer ship to level  
☐ Customer level  
☒ User level

**Budget Periods Setup**

Budget Year: 2021 Budget Year End:

\* No decimals

Period	Start Date	End Date
1	12/31/2020	1/30/2021

5

And when you select the User level, you'll need to set individual budgets for each user with a login.

**BUDGET MANAGEMENT**

**Budget Setup** Budget Maintenance Budget Review

**Budget Enforcement Level**

Selecting an enforcement level for your Budgets will have an impact on the users shopping experience. Only one level may be active.

☐ No Enforcement  
☐ Customer ship to level  
☐ Customer level  
☒ User level

**Budget Periods Setup**

Budget Year: 2021 Budget Year End:

\* No decimals

Period	Start Date	End Date
1	12/31/2020	1/30/2021
2	1/31/2021	

6

Let's say you'd like to set controls at the User level. Just select and save this option, then go to Budget Periods Setup to choose your Budget Year, Assign Calendar Months and Save your preferred time frames.

Home > My Account > Budget Management

## BUDGET MANAGEMENT

Budget Setup   **Budget Maintenance**   Budget Review

Your Budget Enforcement is set to: User level

No budget configured. Please configure a budget to continue.

Select User

Or

Select Ship To Address

Budget Year: 2021 ▾  

7

Then, to manage individual users, navigate to the Budget Maintenance tab, use the pull-down menu and select View Budget to adjust controls.

9	<input type="text" value="9/29/21"/>	<input type="text" value="1000"/>
10	<input type="text" value="10/30/21"/>	<input type="text" value="800"/>
11	<input type="text" value="11/29/21"/>	<input type="text" value="1000"/>
12	<input type="text" value="12/30/21"/>	<input type="text" value="1000"/>

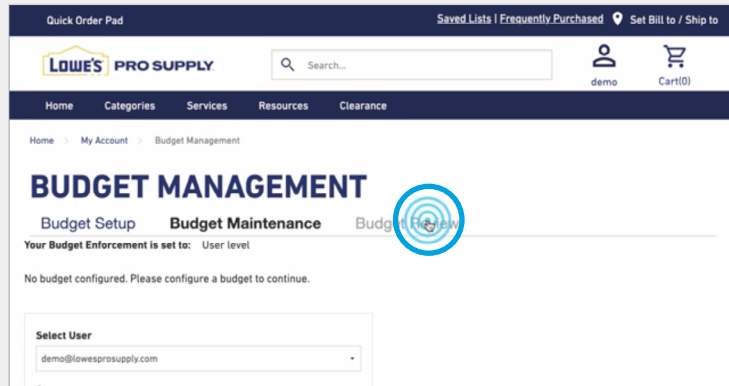
**NEED HELP?**  
Orders: 866.630.6747  
Web Support: 888.204.1160

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Careers

**RESOURCES**  
My Account  
Product Catalog Request

8

Be sure to Save your settings.



9

You can also navigate to Budget Review for a snapshot of current spending, maximum amounts and historical data by user.



## HOW-TO VIDEO: BUDGET MANAGEMENT

Scan the code for a video guide on setting budget controls and viewing spending data.

