Budget Management

Sublogin Documentation

Guide for Magento administrators, technical project owners, and implementation teams.

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Budget Management

`mageb2b/sublogin-budget` checks a sublogin's current cart against configured spending limits. Limits can belong to the sublogin, the main account or both, and can cover a fixed period, a recurring period or one order.

Install and test Budget after the base Sublogin checkout works.

Install

```
composer require mageb2b/sublogin-budget
php bin/magento module:enable MageB2B_SubloginBudget
php bin/magento setup:upgrade
```

Choose the budget types

Open **Stores > Configuration > MageB2B > Sublogin > Budget settings**.

Type	Meaning
Year	Fixed start and end within one selected year.
Yearly	Recurring yearly limit.
Month	Fixed selected month.
Monthly	Recurring monthly limit.
Day	Fixed selected day.
Daily	Recurring daily limit.
Per Order	Maximum for one order.

The default allowed-type list includes the six period types but not **Per Order**. Add it under **Allowed Budget Types** when your buyers need an order cap.

Use a fixed type for a project or a specific accounting period. Use a recurring type for an ongoing purchasing policy.

Decide whose budget applies

Budget Logic provides five choices:

Choice	Result
Disable	Budget validation is not applied.

Choice	Result
Apply main account budget limit when no sublogin budget found.	Use the buyer's budget when present, otherwise fall back to the parent account. This is the default.
Apply main account budget limit and skip sublogin budget.	Ignore sublogin budgets.
Use sublogin budget only.	Ignore main-account budgets.
Combine sublogin and main account budgets.	Evaluate applicable values from both owners.

Combined mode does not turn every record into one unrestricted total. Applicable amounts are combined by budget type and period; the effective per-order value uses the maximum applicable per-order allowance. Test the exact record combination you intend to use.

Assign budgets per website

Every budget record carries a required **Website** selection in the Admin budget form, and budgets apply only in that website's storefronts. A buyer who purchases in two websites can therefore have independent limits and independent usage per website.

Existing budgets created before website scoping was introduced are migrated to their owners' websites during the upgrade. On multi-website installations, verify a few migrated records and the Admin website selection before assuming a shared limit.

Choose what counts as spending

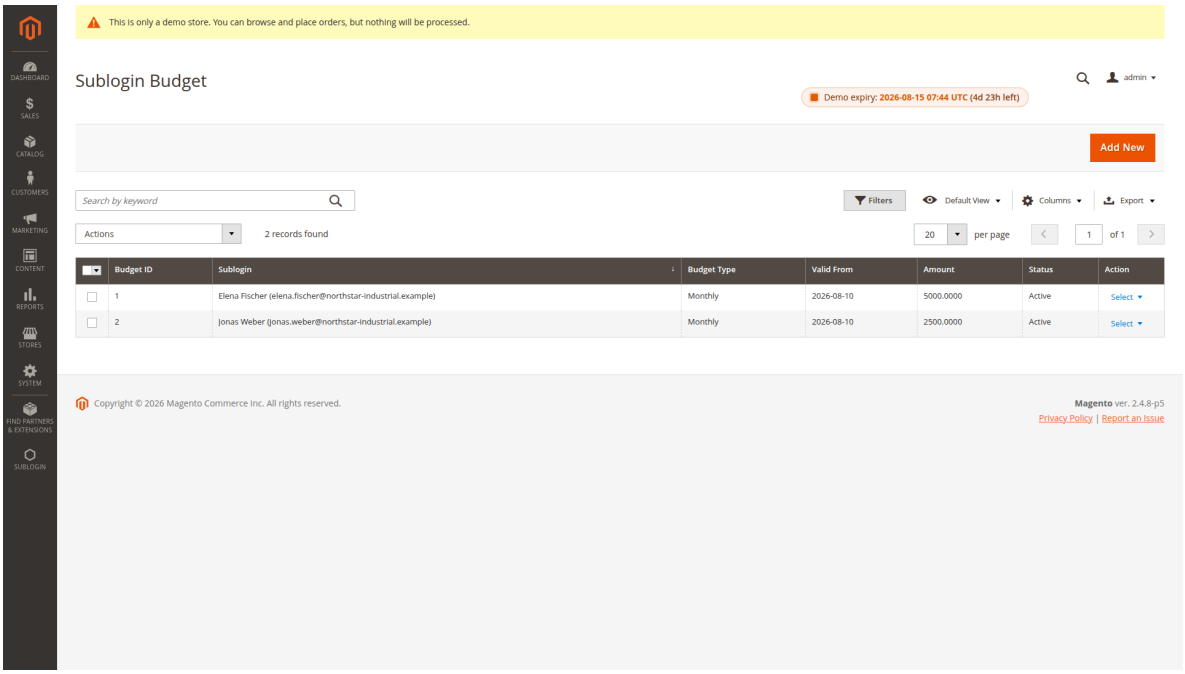
Setting	Default	Guidance
Budget Calculation Basis	Grand total	Choose subtotal when shipping and tax should not consume budget. Choose grand total for the final payable amount.
Order Status for budget consideration	Processing, Complete, Closed	Only orders in selected statuses contribute to used spend. Align this list with your cancellation and payment flow.
Use only Pay on Budget orders for budget usage	No	When enabled, orders paid another way do not consume the tracked budget.

Changing statuses or calculation basis changes future validation and can also change how past orders contribute to the current period. Review the effect before changing a live

website.

Create and test a budget

1. Choose one staging sublogin.
2. Create one active Monthly budget for the current month.
3. Set a round amount that makes the test easy to understand.
4. Add a cart below the remaining budget and proceed to checkout.
5. Place the order and move it into a status counted by Budget.
6. Start a second cart that exceeds the remaining amount.
7. Confirm the configured period, spent amount and exceeded amount appear in the message.



Add more periods only after this single record behaves as expected.

Checkout enforcement

Budget validates the quote during checkout. An over-budget cart is normally blocked.

When Order Approval is installed, **Allow budget restricted order to checkout** can send an over-budget order into the approval state instead. In that path, the sublogin's normal approval flag and threshold are ignored for the budget-restricted order.

Enable order approval on empty budget applies only to that integration and only when the sublogin is configured to need approval. Test an account with no applicable budget so the fallback is deliberate.

Multishipping checkout follows the same rule: an over-budget cart disables the multishipping flow unless **Allow budget restricted order to checkout** routes the order

into approval instead. If buyers report a missing "Check Out with Multiple Addresses" option, check the current cart against the applicable budgets first.

Budget summaries and messages

Budget summaries are disabled by default for both the sublogin and main customer. Enable the appropriate storefront summary when users should see the limit, used amount and remaining amount.

The exceeded messages support placeholders shown in Admin. Keep the wording factual and tell the buyer whom to contact. Do not expose internal IDs or approval tokens.

Pay on Budget

Pay on Budget is an offline Magento payment method and is disabled by default under **Stores > Configuration > Sales > Payment Methods**.

It is available only when:

- the shopper is an active sublogin;
- an applicable budget exists;
- the current cart passes budget validation;
- the method is enabled for the website and country.

Enforce Pay on Budget as only payment method when budgets are available hides other payment methods for an eligible buyer. Enable it only after confirming Pay on Budget works for every affected checkout country and address.

Expired fixed budgets

The cron job `mageb2b_subloginbudget_disable_expired_budgets` runs daily at 04:00 and deactivates expired fixed Day, Month and Year records. Recurring Daily, Monthly and Yearly records remain active because their period rolls forward.

Make sure Magento cron runs reliably. If a fixed record stays active after its end date, check the cron schedule and job history before editing the database.

One-time allowance

The separate `mageb2b/sublogin-budget-one-time` package lets the latest active one-time record override normal budgets for the next successful order. See One-Time Budget.

Integration boundary

Budget exposes PHP interfaces for code inside Magento. It does not register a REST or SOAP budget endpoint. See Budget Integration Boundary.

Hyvä storefront

Install `mageb2b/sublogin-budget-hyva` when the store uses Hyvä. See Hyvä Compatibility Packages.

Troubleshooting

- **Used amount is zero:** confirm the order reached a counted status and review Pay-on-Budget-only mode.
- **The wrong total is checked:** review subtotal versus grand total.
- **No budget appears:** check owner, type, active flag, period and Budget Logic.
- **Checkout is blocked:** compare the current cart with every applicable period and per-order limit.
- **Pay on Budget is missing:** check payment-method enablement, country, active sublogin and budget errors.

Related: Order Approval and Payment and Shipping Restrictions.