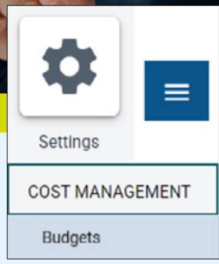
Microsoft

Set up Budget Alerts on StreamOne®



Navigation: Settings > (Cost Management) Budgets

Overview

Budgets is a platform cost management feature that allows Resellers to define and track cloud spend against predetermined criteria, with rules-based notifications if budgets are exceeded. This functionality is used by resellers to help their customers track their entire cloud spend and align it with their budgets in order to prevent cost overruns.

This feature includes the ability to:

- Track by provider
- Track across multiple providers
- Track by individual customer or group of customers
- Normalise spend to a specific currency with exchange rate adjustments
- Send alerts to internal platform recipients
- Track by partner cost or customer cost
- Trigger notifications by % of budget met or dollars exceeded

Note: Each time billing data from the provider is imported, the budgets are double-checked (usually daily). When the value has increased above the threshold since the last import, the budget warning is activated. Because the spending occurs constantly during those 24 hours, it's likely that the total will be a fluctuating amount above the threshold.

Creating a Budget

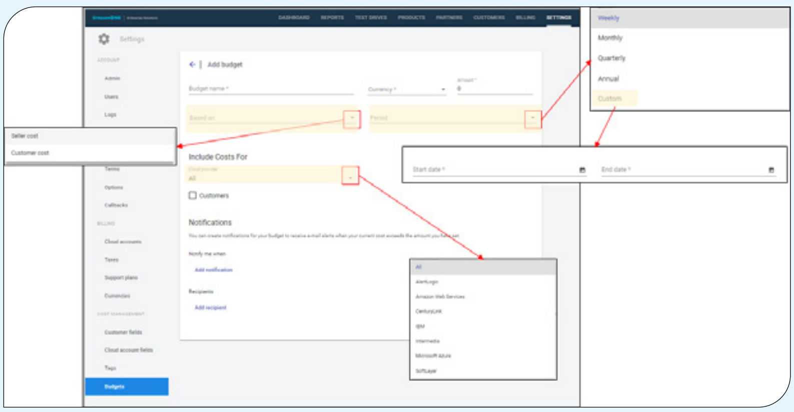
The Budget screen is divided into these categories:

1. Budget header information
2. Cost settings
3. Notifications

To create or 'Add' a budget, follow these steps:

1. From the Settings module, scroll to the **Cost Management** section, then click the **Budgets** menu option.
2. Click **[Add]**. The Add budget screen displays.
3. Enter a Budget Name (Note: This name is the reference used in your notifications)
4. Select a currency *
5. Enter a budget total threshold amount
6. Select an option for the budget base:
   a. Seller cost is equal to reseller price
   b. Customer cost is equal to the price book you set for the customer.
7. Select the period of time you want the budget to measure against. The options are:
   a. Weekly
   b. Monthly
   c. Quarterly
   d. Annual
   e. Custom (when you select this option, the Start date/End date entry fields display)

All fields with an "*" are required.



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Customer Cost Settings

By default, a budget is set to **"ALL"** cloud providers and **"ALL"** customers. Use the drop-down lists to customise your budget by provider, by customer, by cloud account.

Note: If you choose multiple customers, the Cloud Account option will be disabled and set to ALL.

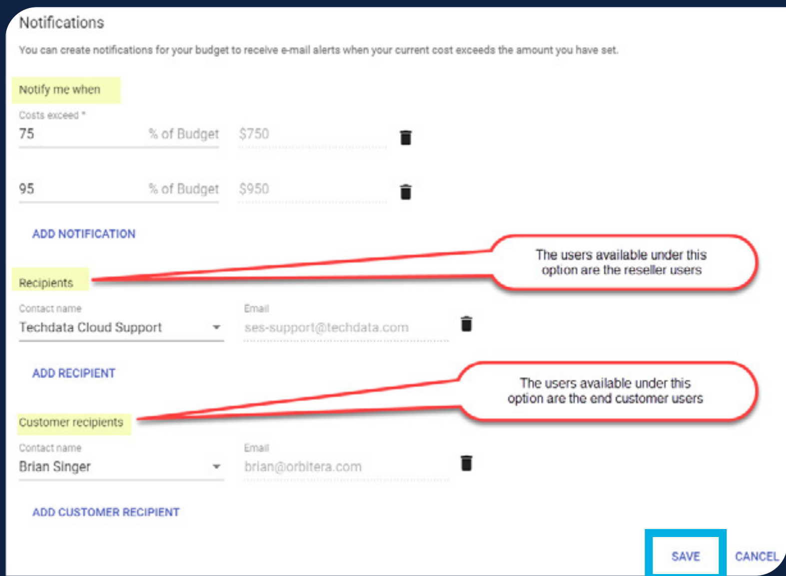
- If you know the customer name, start by typing their name and it automatically filters the selection for you.
- You can select one or more "accounts" *

Notifications

Notification options include the settings for various percentage (%) thresholds for the budget and to who you want the notification to be sent to.

The recipients are based on "users" setup in the platform. If a user is not available to pick from the drop down list, you must add them.

Note: Alerts in the database are reinitialised when a budget setting is changed.



Under "Notify me when" click **[Add Notification]** to setup your first threshold.

- Enter a percentage (the platform will create the budget value)
- You can add as many notifications as you need.

Under "Recipient", click **[Add recipient]** to pick a name from the User list

- You can select recipients based on current users in your account. This will not include end customers.
- The Contact Name and Email field populate based on your selection.
- You can add one or more recipients.

Under "Customer recipient", click **[Add Customer Recipient]** to pick a name from the User list

- You can select recipients based on active users from the Customer's account.
- The Contact Name and Email field populate based on your selection.
- You can add one or more customer recipients.

Click **[Save]**

Video Tutorial
How to Create Budgets in SIE →

Note: If an end customer sets a budget inside their AWS console, linked accounts that use Budgets will see discounted, blended rates.

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