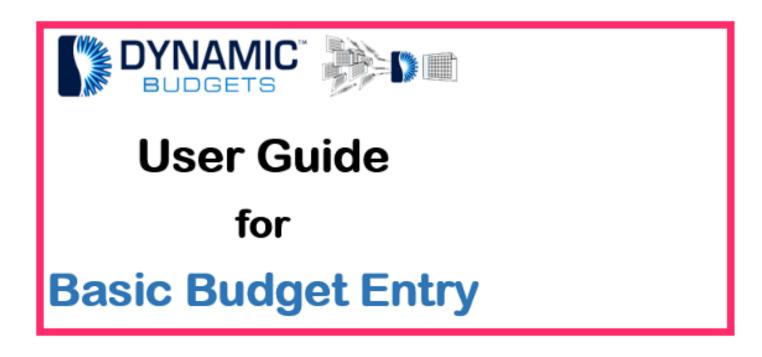
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Dynamic Budgets user Guide for Basic Budget Entry

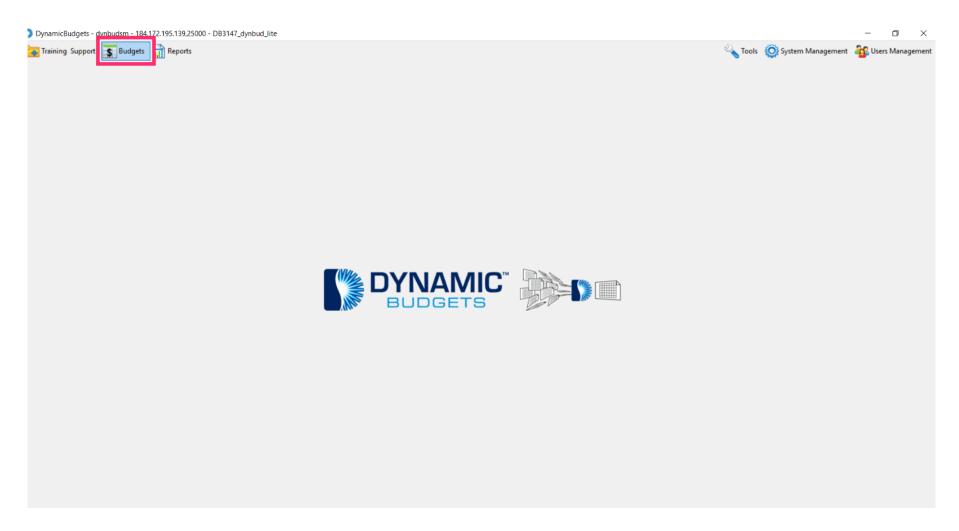


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• We are going to review how to enter your budget. Let's get started. Click on Budgets.

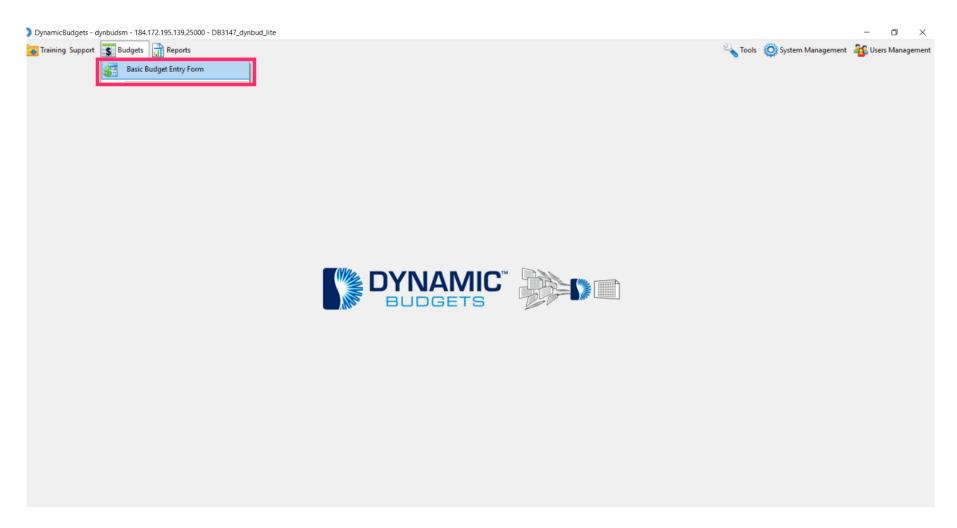


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Click on Basic Budget Entry Form.

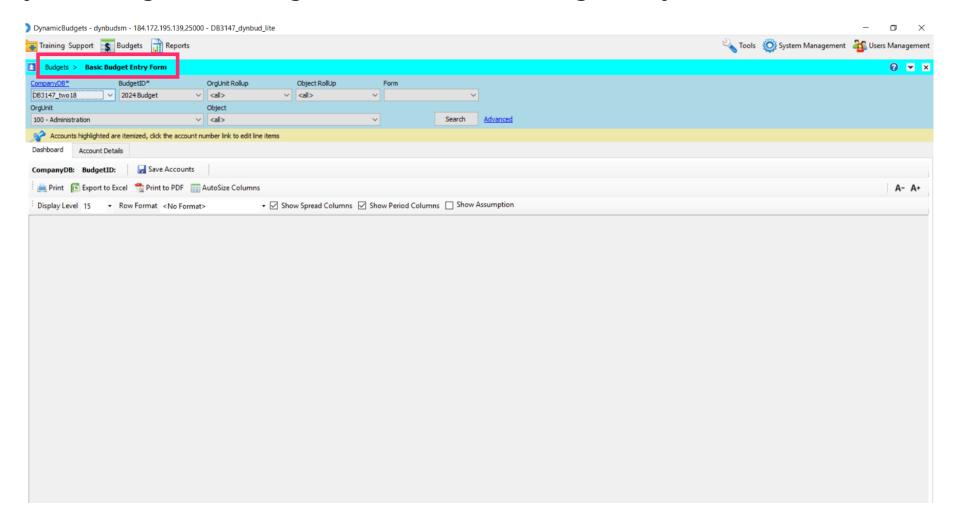


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Note: As a reminder, this path shows you how to get to this screen again. In this example, you would go to the Budgets menu then Basic Budget Entry Form.

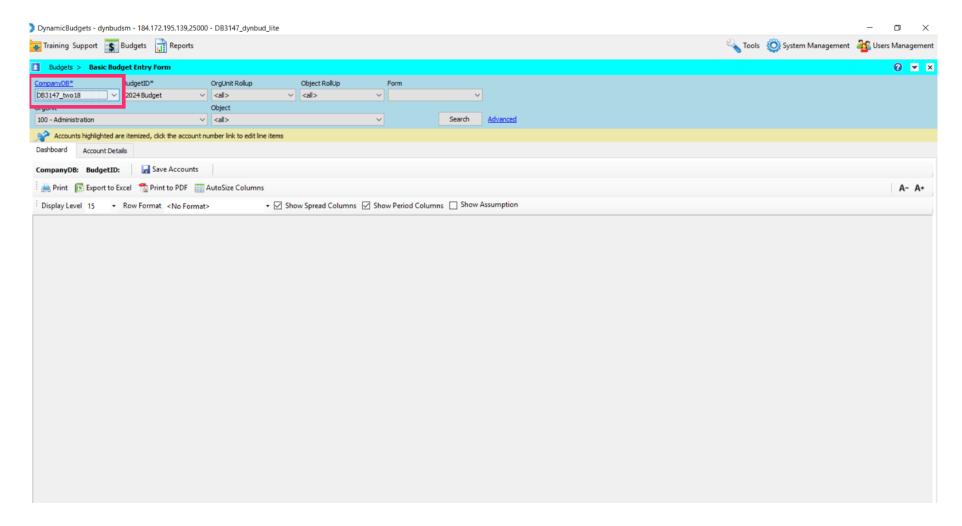


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Click on the CompanyDB dropdown list. Make your selection. In this example, select DB3147_two18.

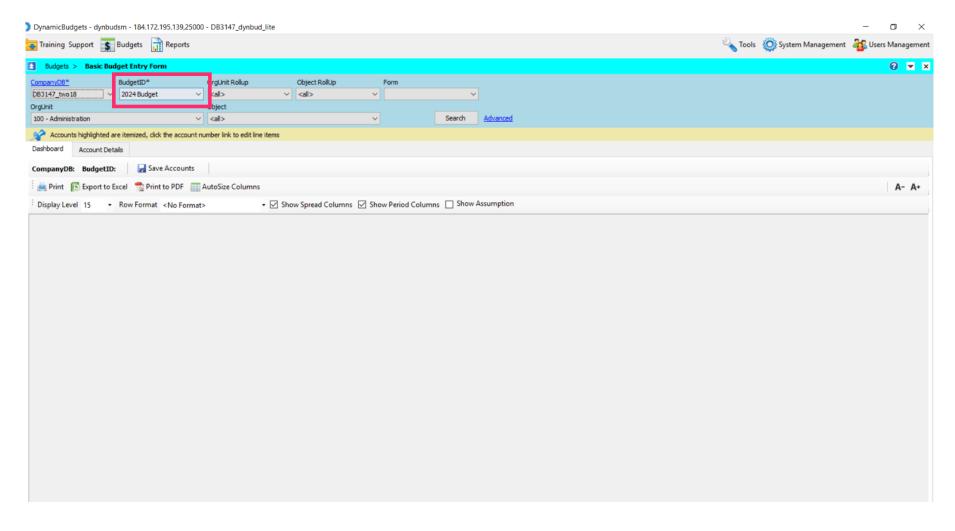


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Click on the BudgetID dropdown list. Make your selection. In this example, select 2024 Budget.

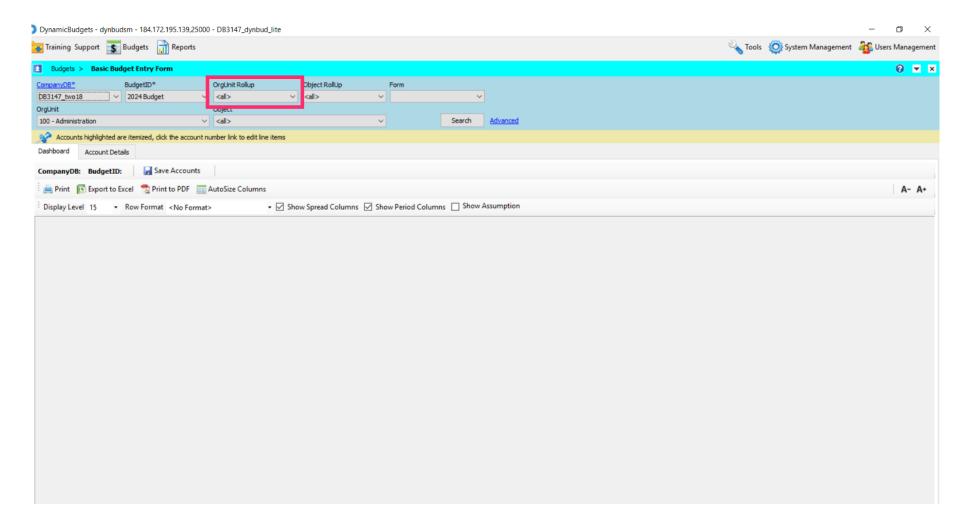


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Click on the OrgUnit Rollup dropdown list. Make your selection. In this example, select all.

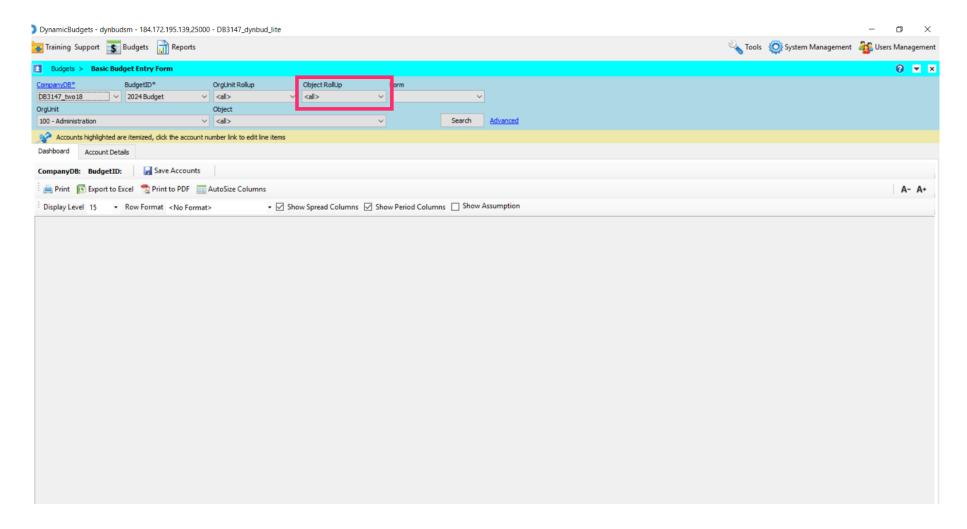


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Click on the Object Rollup dropdown list. Make your selection. In this example, select all.

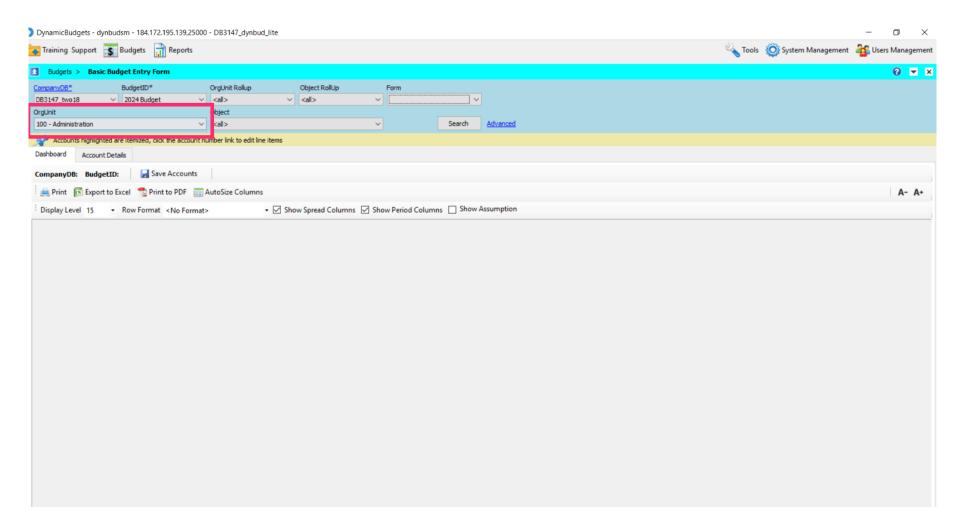


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Click on the OrgUnit dropdown list. In this example, we will select 100-Administration.

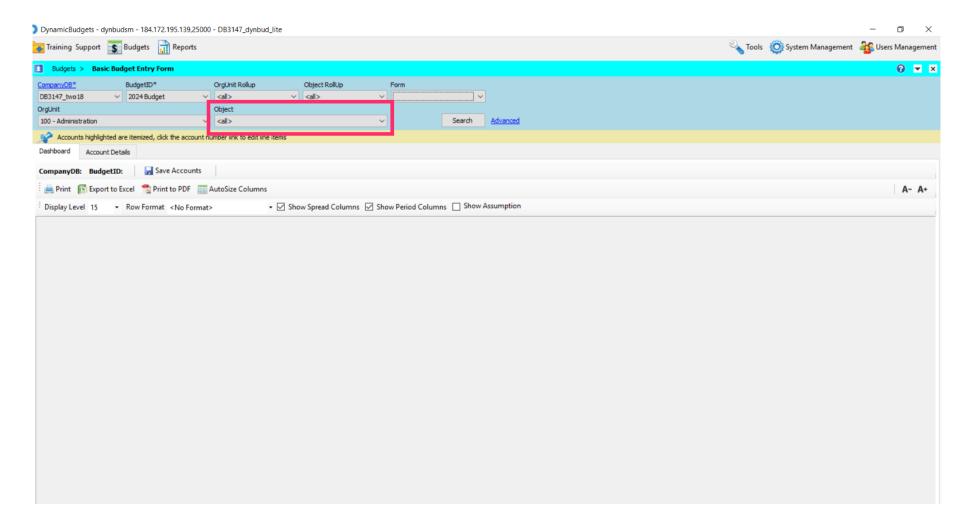


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Click on the Object dropdown list. In this example, we will select all.

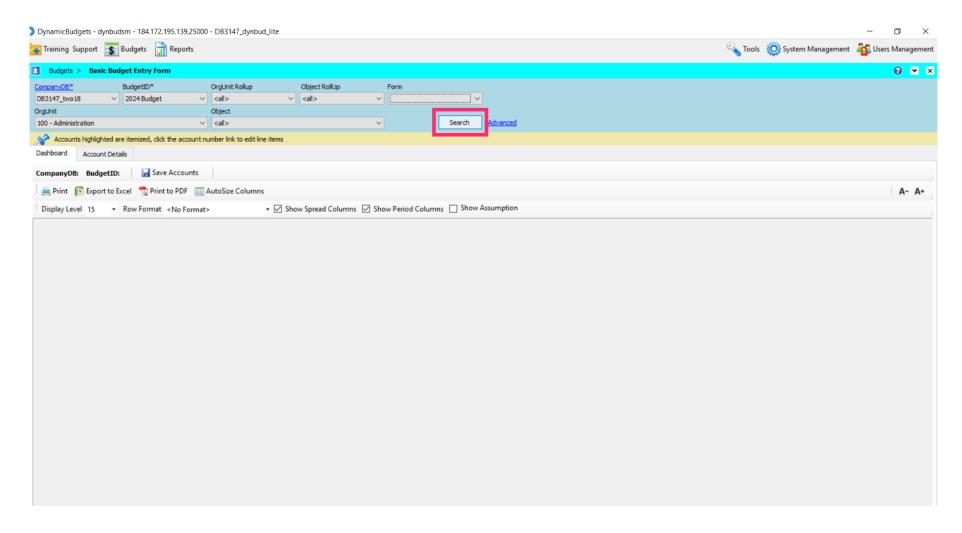


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Click on Search.

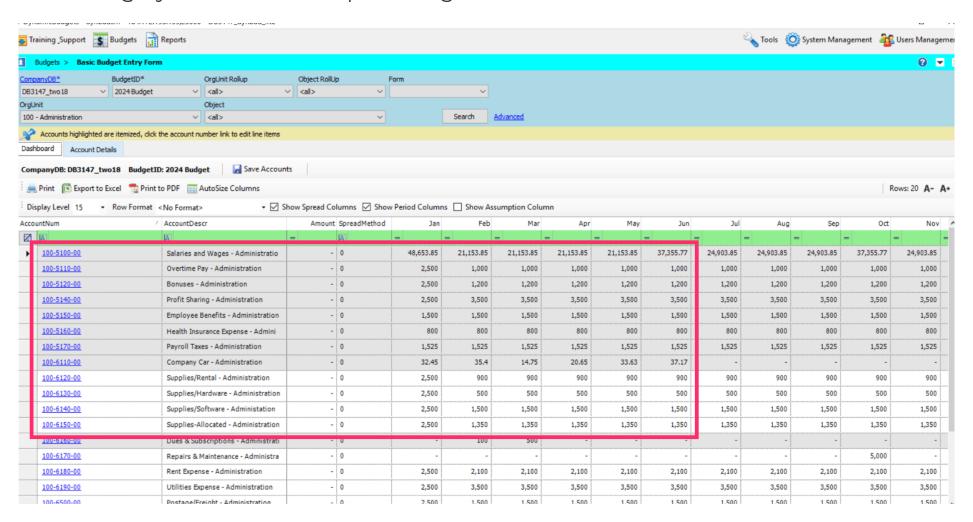


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You must click on the blue-hyperlink for the account you want to review. Note: Accounts that are grayed out have complex budget data that has been entered.

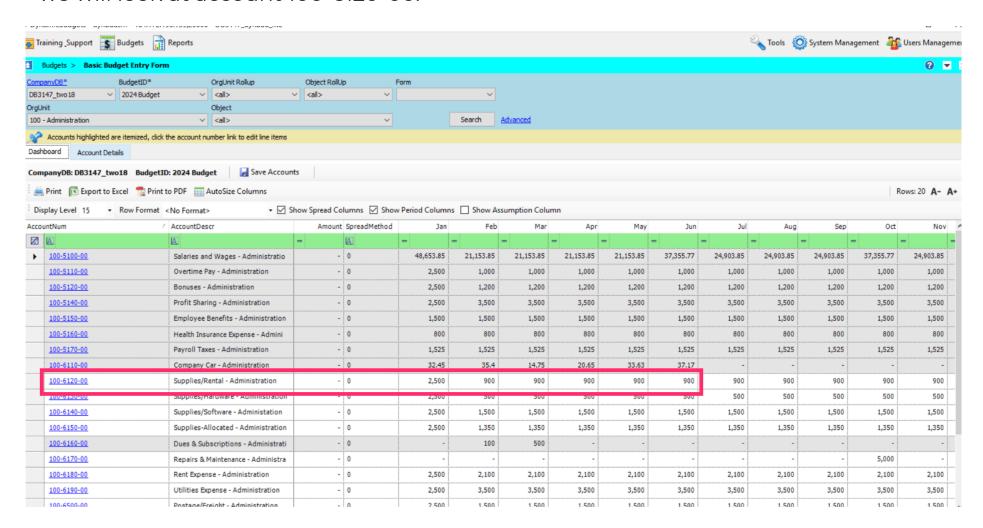


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You must click on the blue-hyperlink for the account you want to review. In this example, we will look at account 100-6120-00.

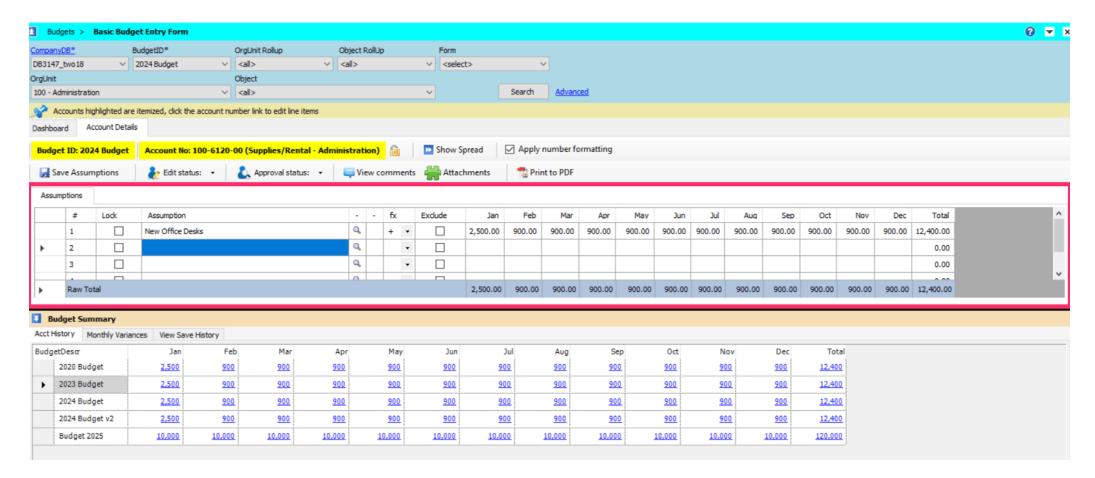


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• Now you are in the Assumptions grid or single-line item details screen.

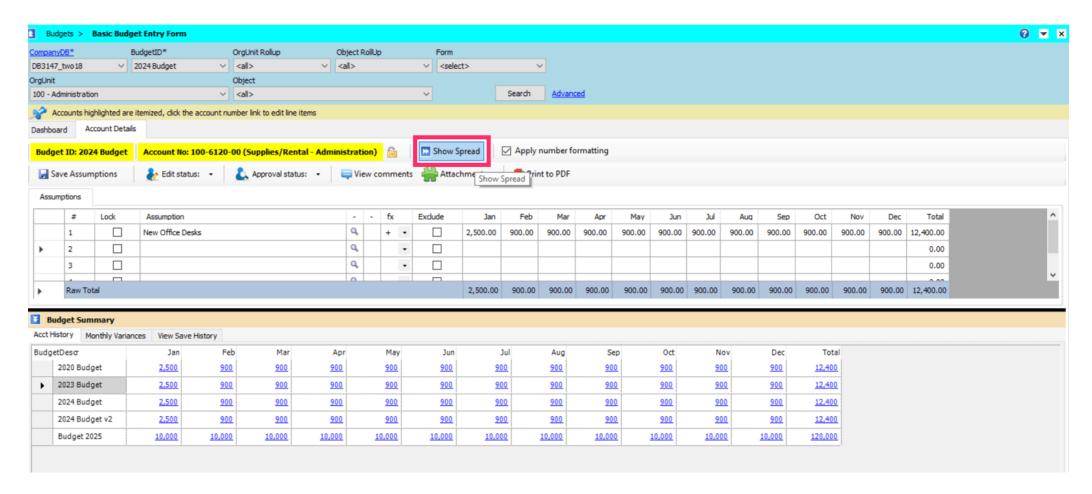


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Click on Show Spread. We will review 2 spread methods.

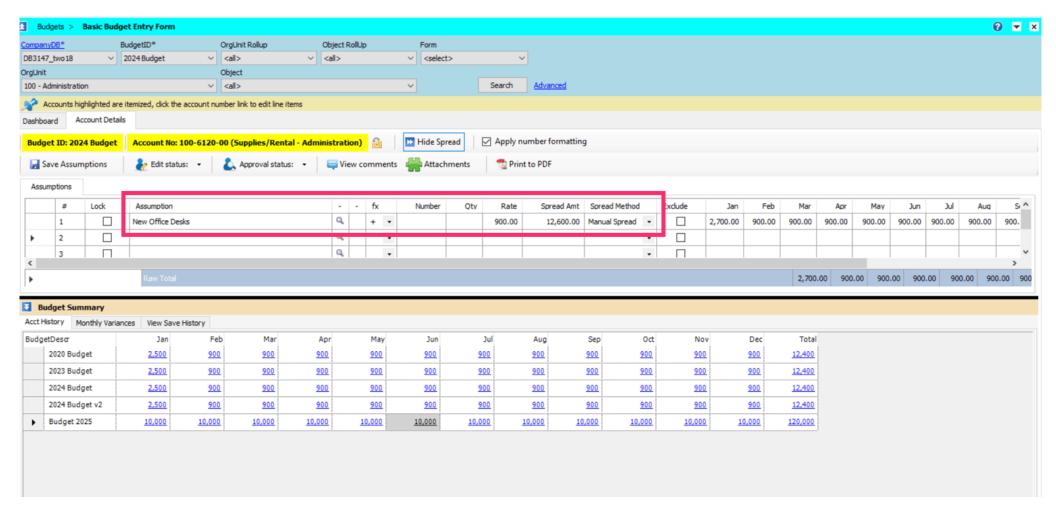


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1. Manual Spread Method: Select Manual Spread Method Enter your description, rate, spread amount & the (\$) for the months that apply to this assumption. In this example, new office desks are bought @ \$900 per unit for a total of \$12,600.

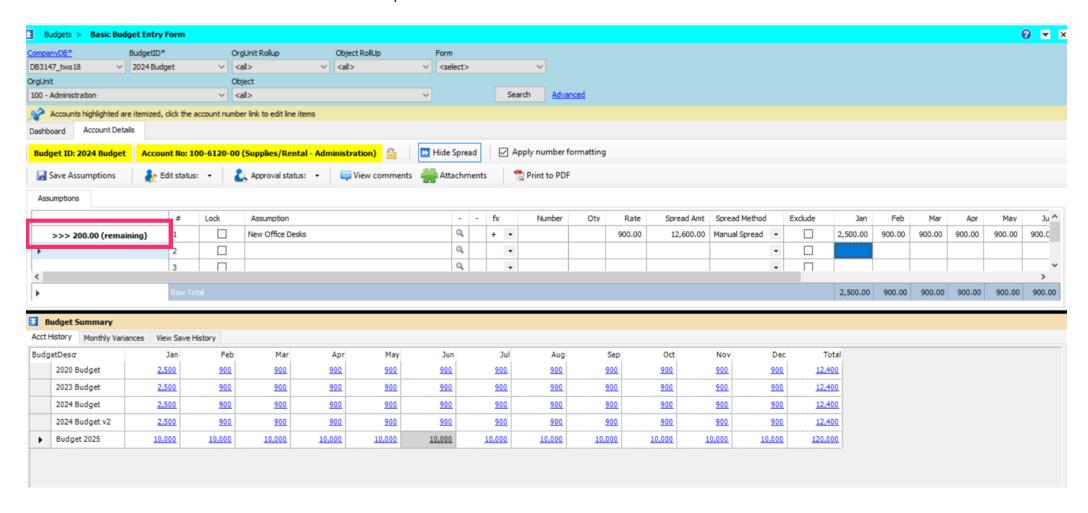


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>>> 200.00 (remaining) If a spread amount has been entered and the total is less than that amount for the year, then this message will continue to display until an adjustment is made to balance this assumption & clear this notice.

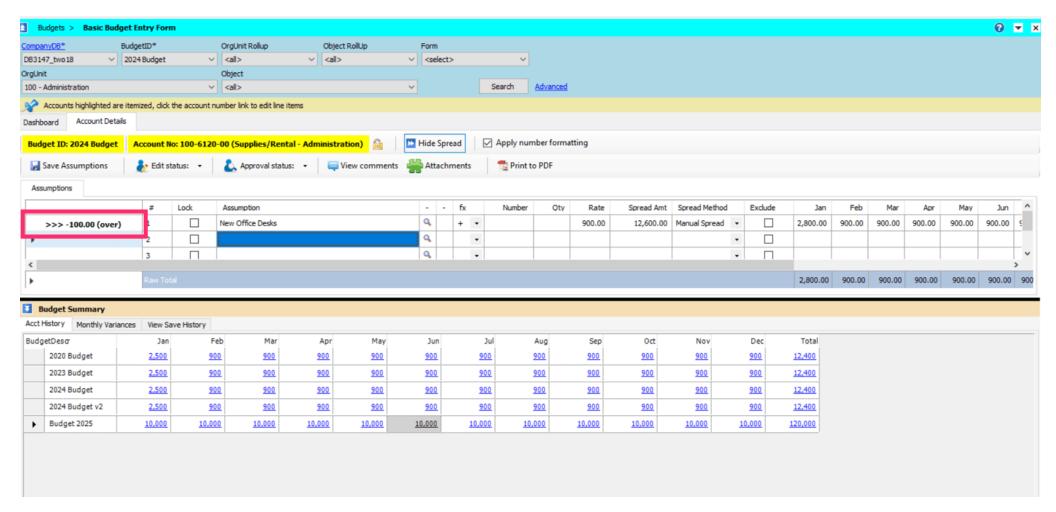


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>>> - 100.00 (over) If a spread amount has been entered & the total is more than that amount for the year, then this message will continue to display until an adjustment is made to balance this assumption & clear this notice.

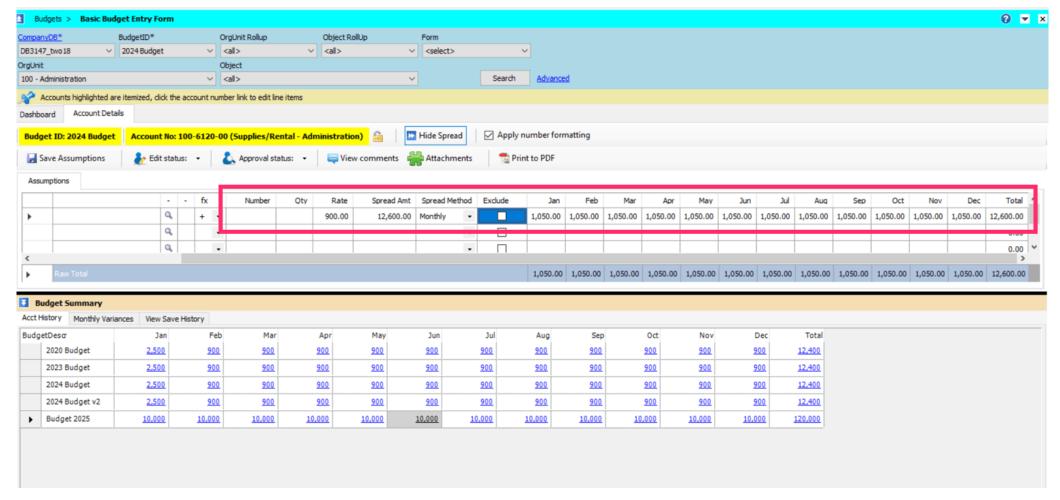


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2. Monthly Spread Method: Select Monthly Spread Method. Enter your description, rate & spread amount. In this example, new office desks are bought @ \$900 per unit for a total of \$12,600 which is spread evenly across 12 months.

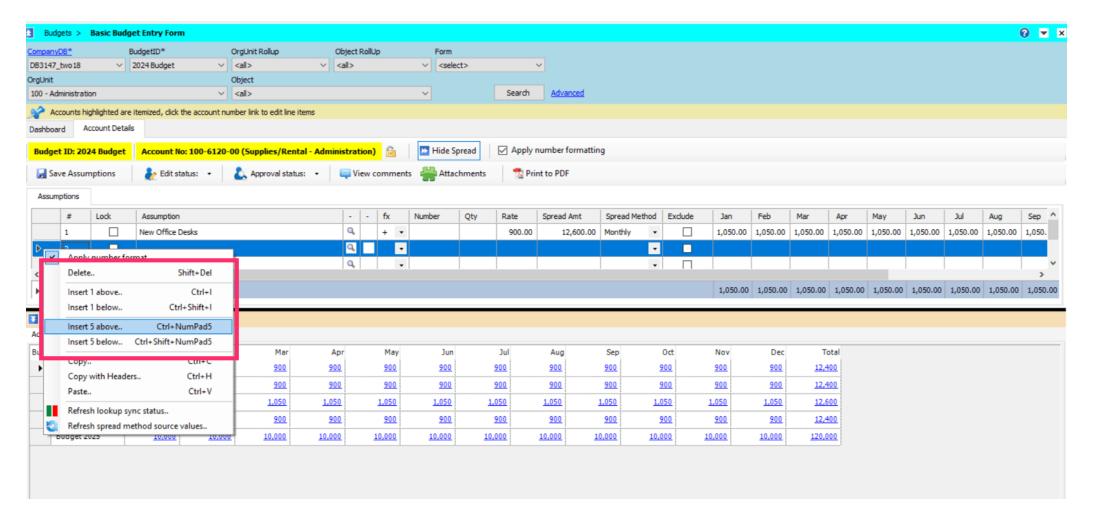


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You can delete or add rows as needed. Just right click on a row and make a selection to delete, Insert 1 above or below, OR Insert 5 above or below.

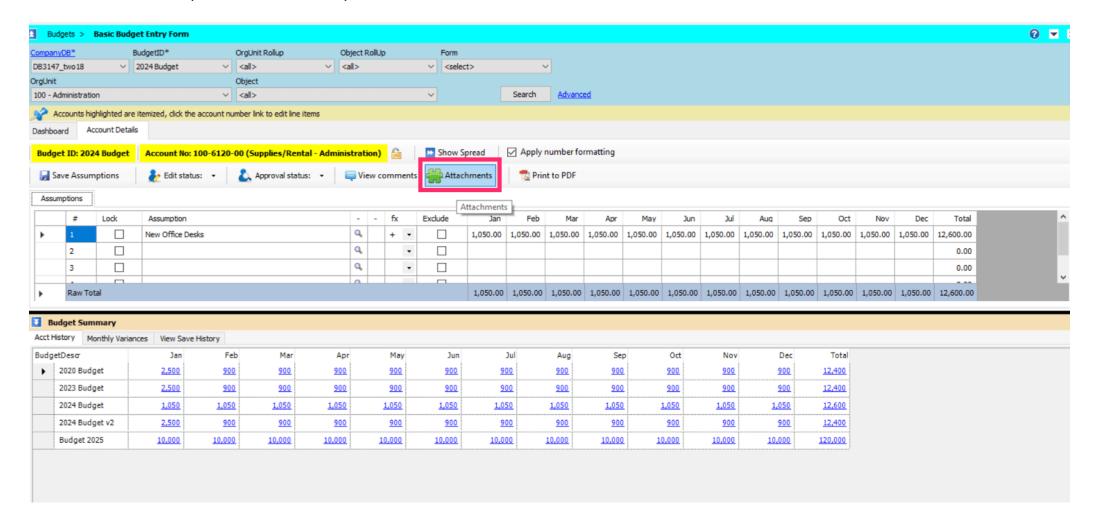


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• If you want to attach supporting details for an entry, you can attach the document(s) to this account (on this screen). Click on Attachments.

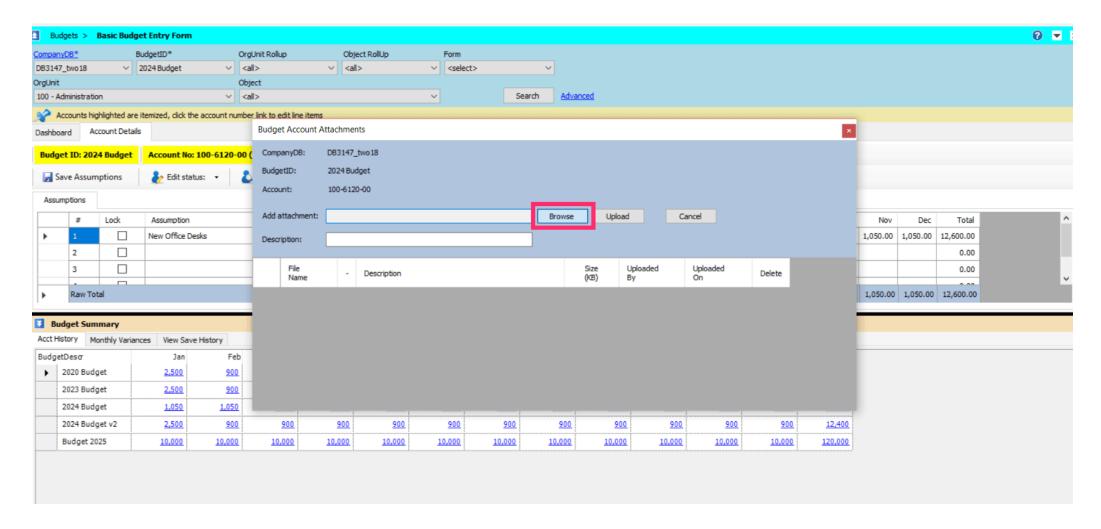


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Click on Browse.

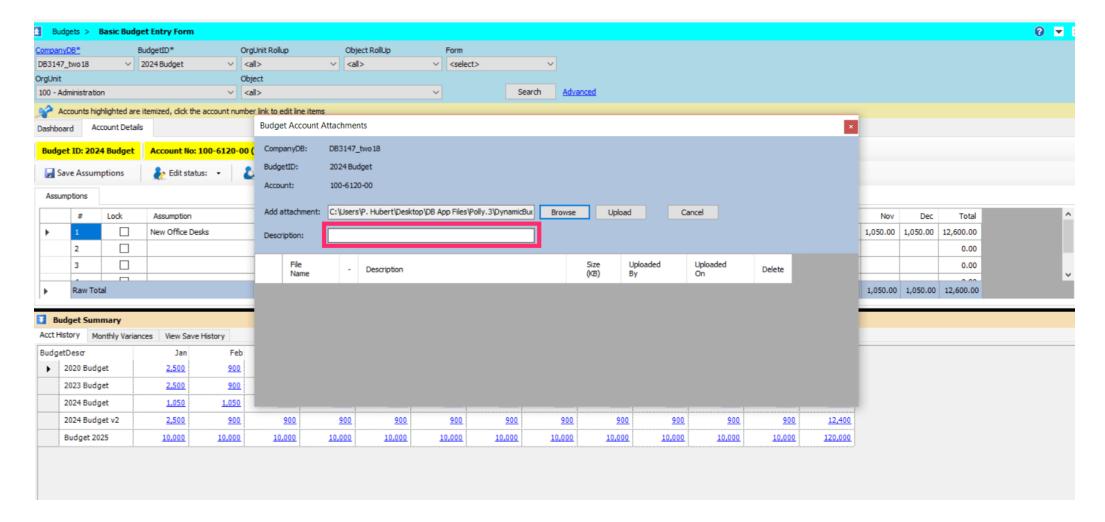


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• After selecting and attaching the file, enter a description.

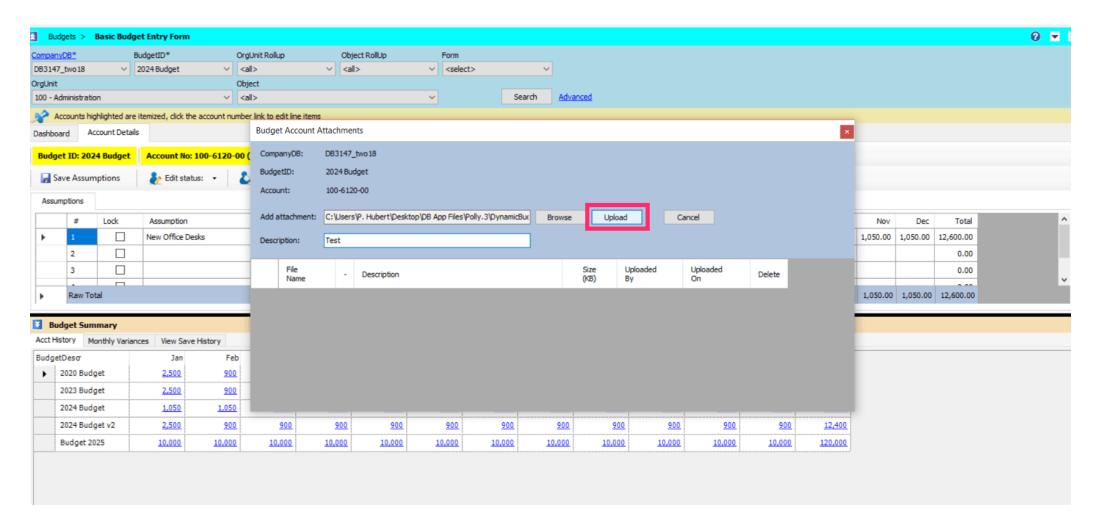


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• Now click on Upload. A message will appear the reads, Added successfully.

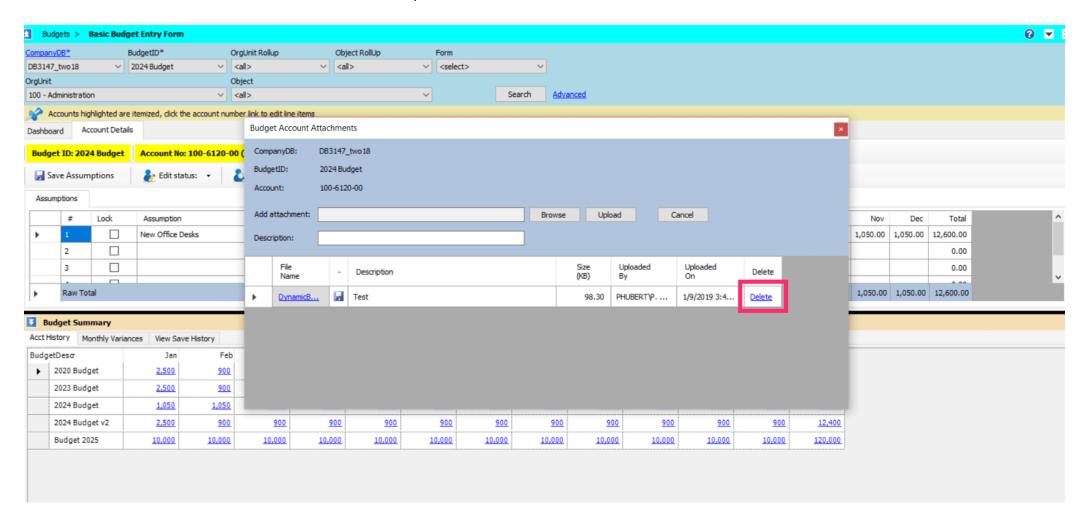


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Now you see the attachment listed. If you uploaded the wrong file or made changes to the file, click on delete & start this process over.

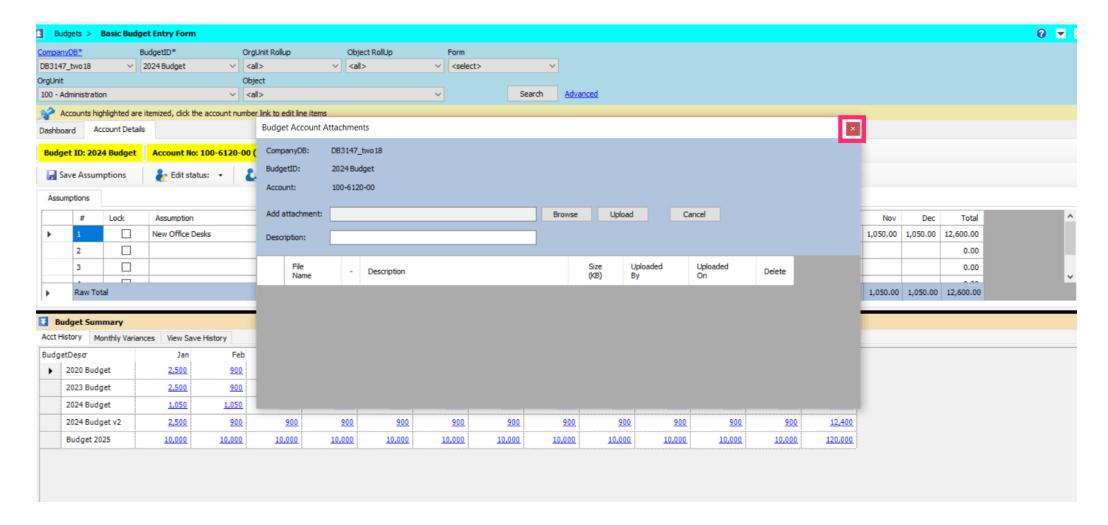


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Click on the Red x to close this window.

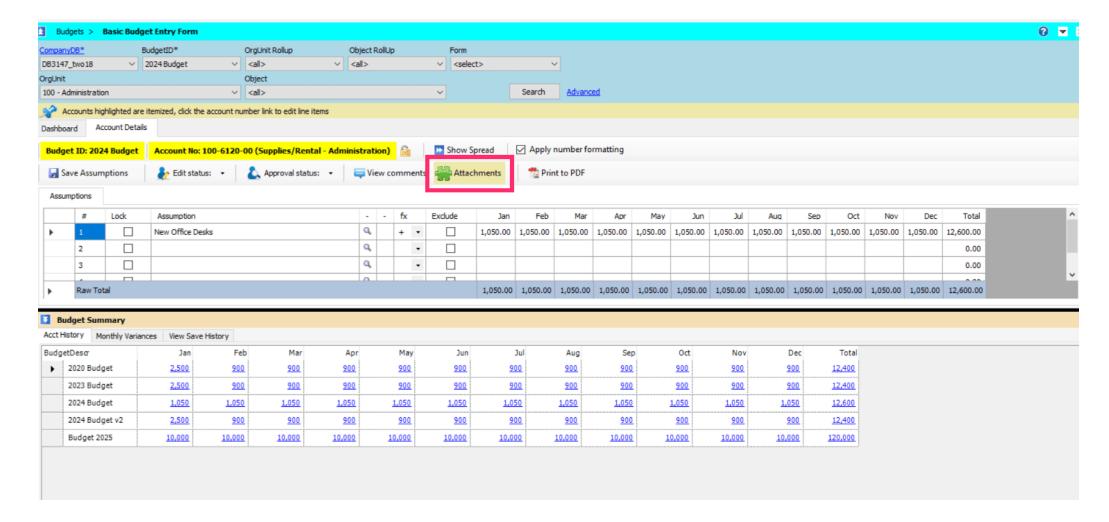


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• Note: When an attachment is present, the Attachments button is yellow.

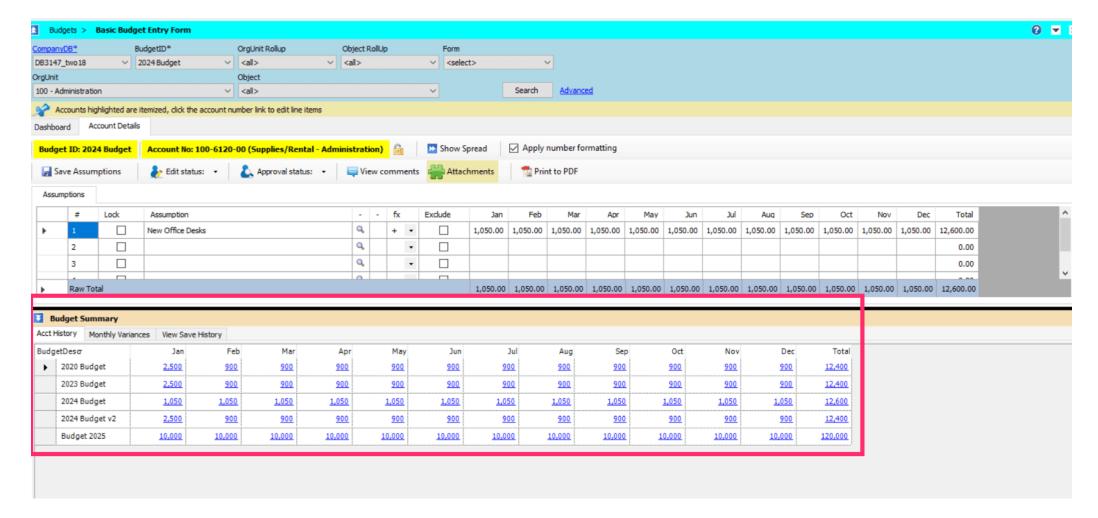


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You can look at the bottom of the screen below the solid black line in the BUDGET SUMMARY to view previous and current years actual, budgets & forecasts.

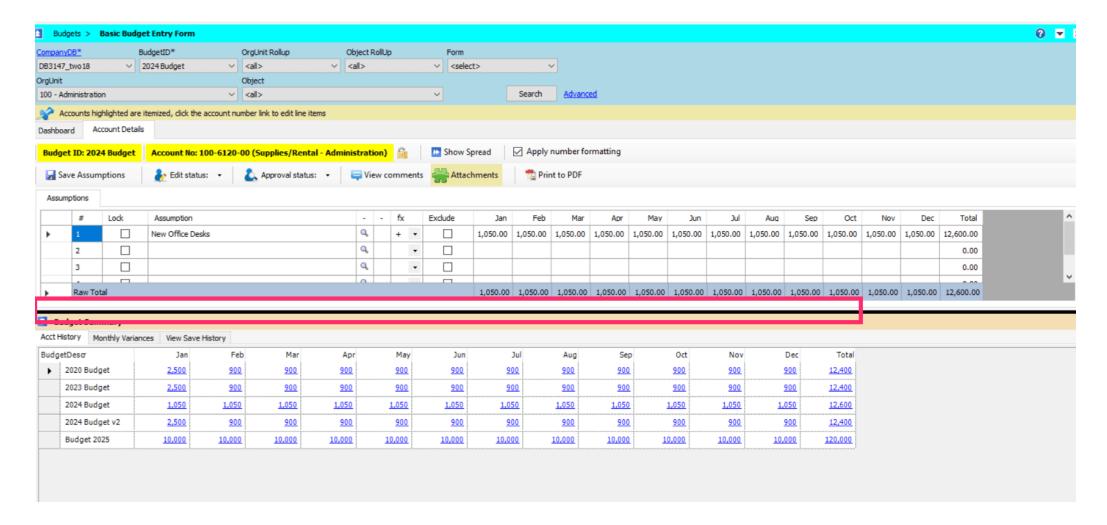


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• You can drag this black line up or down to your preferred view.

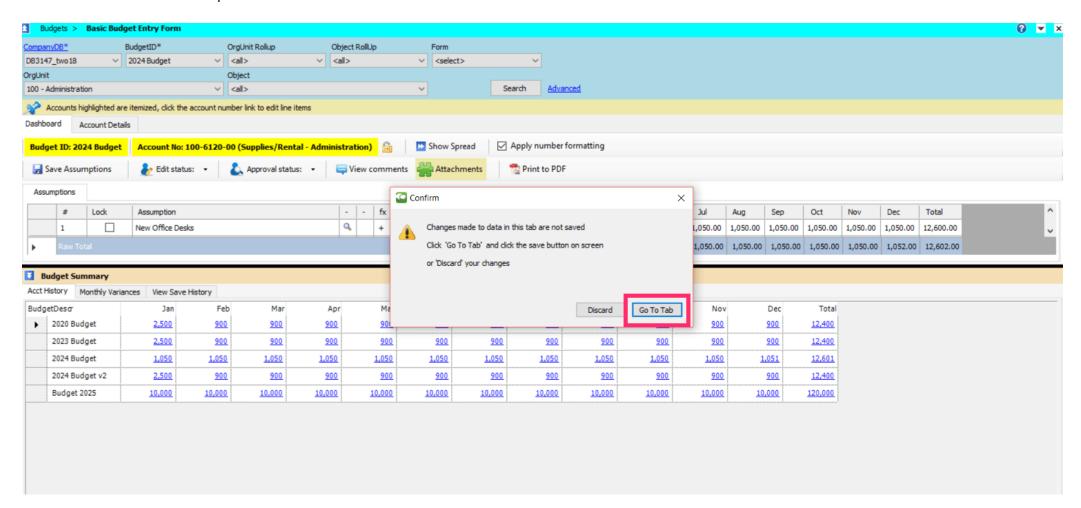


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If you try to go back to the dashboard or previous screen without saving any changes made to this assumptions screen, a message will appear to discard the changes OR go to tab to Save Assumptions. Let's click on Go To Tab.

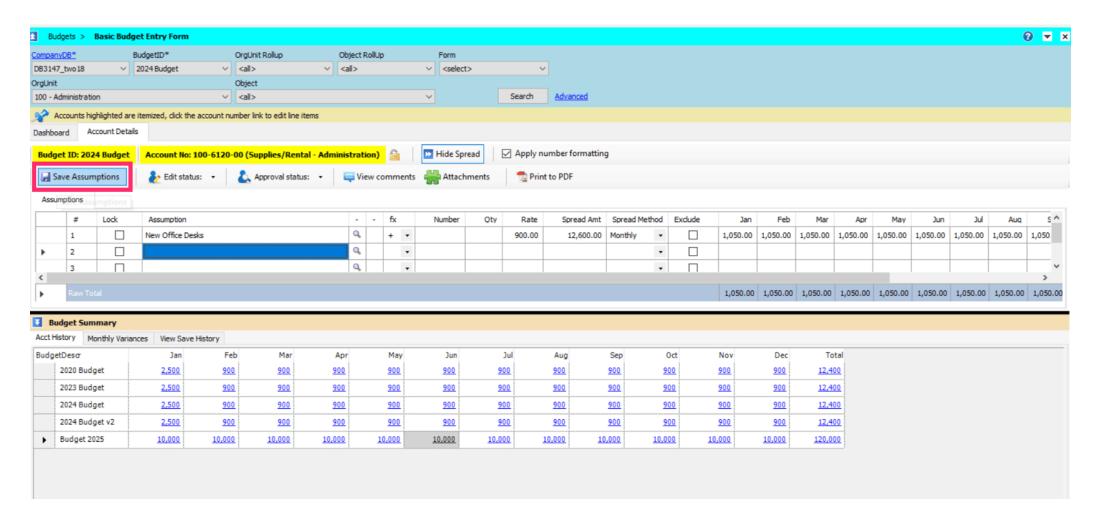


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• Now click on Save Assumptions. A message will appear that reads, saved successfully.

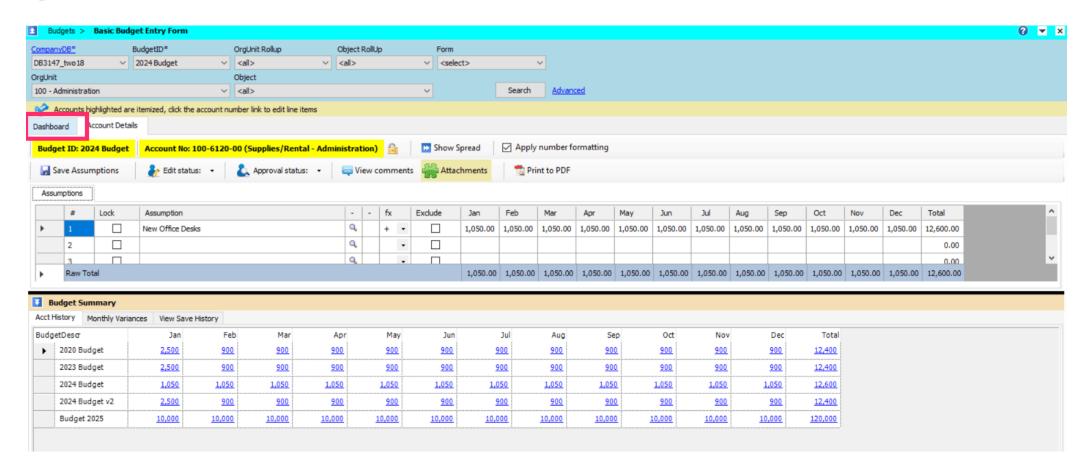


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Click on Dashboard to return to the previous screen.

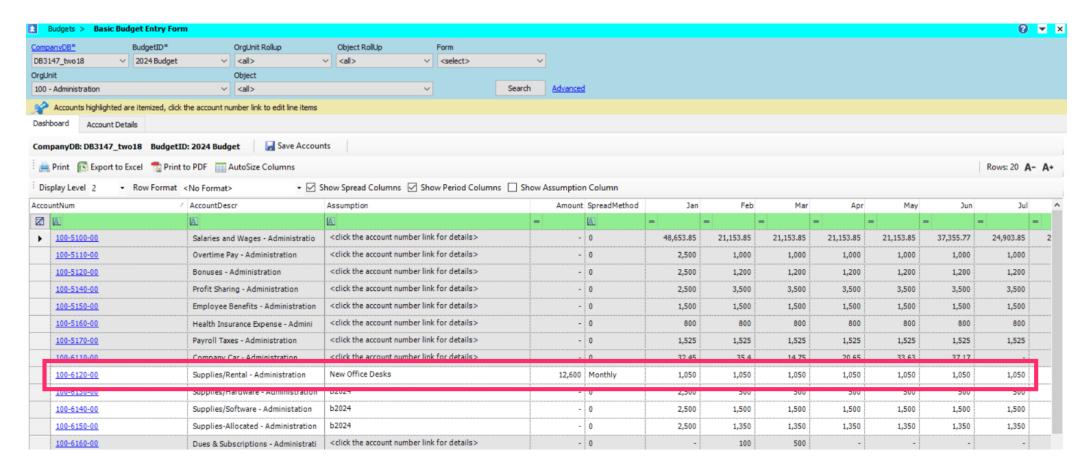


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Now you can see the budget data entered for account 100-6120-00.



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🌓 💎 That's It. You're Done.



That's It. You're Done.

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