



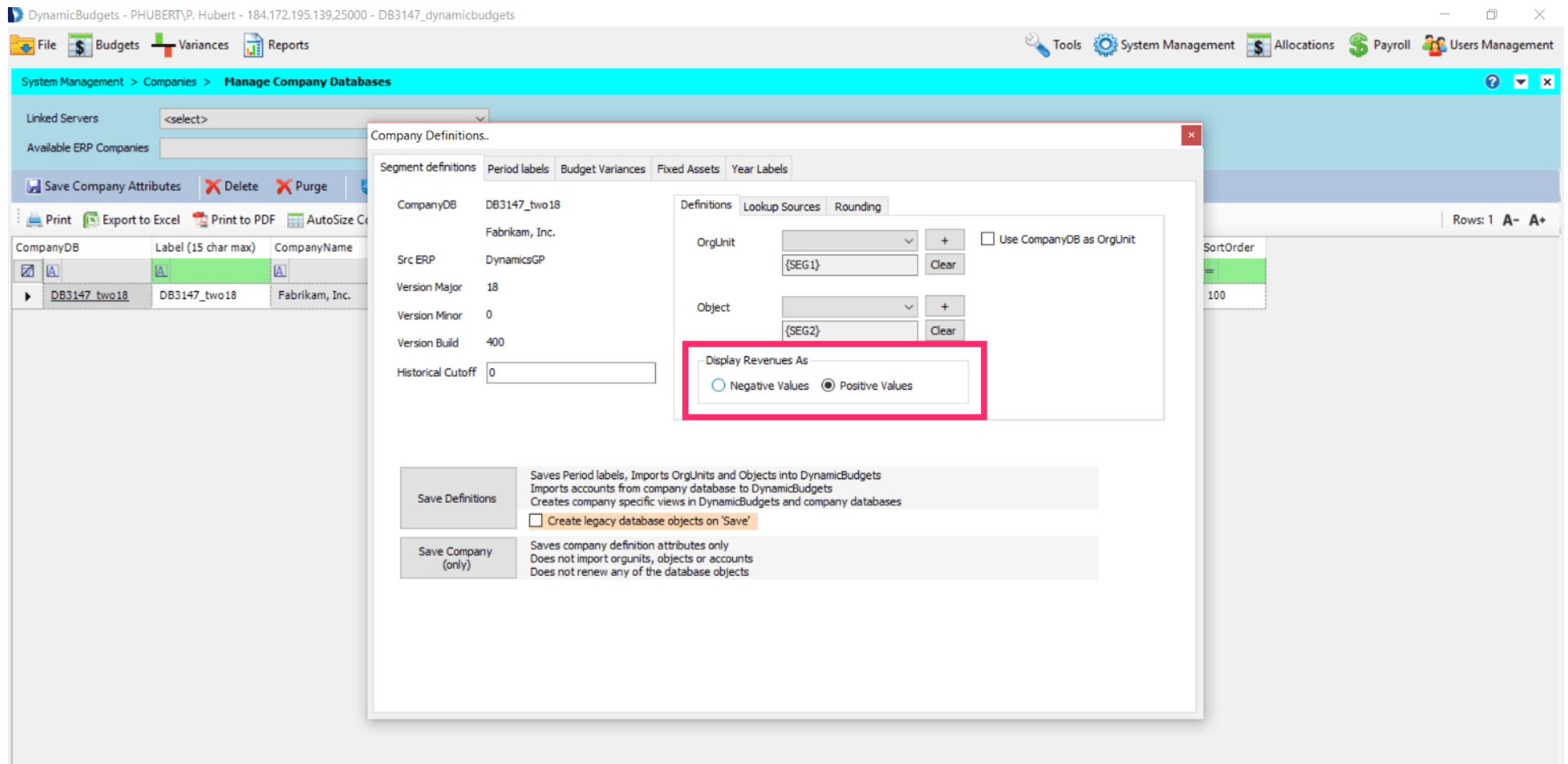
Dynamic Budgets User Guide for Change in Display of Revenue Values



User Guide for Change in Display of Revenue Values



Contact Dynamic Budgets before changing the display of revenue. The reasons are: 1. We need to determine the assumptions, allocations, and fixed calc entry. 2. We may have multiple tables of data and years of history to correct.



DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynamicbudgets

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

System Management > Companies > Manage Company Databases

Linked Servers: <select>

Available ERP Companies:

Save Company Attributes Delete Purge

Print Export to Excel Print to PDF AutoSize Columns

CompanyDB	Label (15 char max)	CompanyName
DB3147_two18	DB3147_two18	Fabrikam, Inc.

Company Definitions.

Segment definitions Period labels Budget Variances Fixed Assets Year Labels

CompanyDB: DB3147_two18

Src ERP: DynamicsGP

Version Major: 18

Version Minor: 0

Version Build: 400

Historical Cutoff: 0

Definitions Lookup Sources Rounding

OrgUnit: {SEG1} Use CompanyDB as OrgUnit

Object: {SEG2}

Display Revenues As

☐ Negative Values ☒ Positive Values

Save Definitions: Saves Period labels, Imports OrgUnits and Objects into DynamicBudgets. Imports accounts from company database to DynamicBudgets. Creates company specific views in DynamicBudgets and company databases. ☐ Create legacy database objects on 'Save'

Save Company (only): Saves company definition attributes only. Does not import orgunits, objects or accounts. Does not renew any of the database objects.



Note: Brand new customers not a problem. Changes can be made for them. Also, The changes cannot be corrected from the front end, but it's an easy fix in SQL. This doesn't affect GP. Only Dynamic Budgets.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynamicbudgets

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

System Management > Companies > Manage Company Databases

Linked Servers: <select>

Available ERP Companies:

Save Company Attributes Delete Purge

Print Export to Excel Print to PDF AutoSize Columns

CompanyDB	Label (15 char max)	CompanyName
DB3147_two18	DB3147_two18	Fabrikam, Inc.

Company Definitions.

Segment definitions Period labels Budget Variances Fixed Assets Year Labels

CompanyDB: DB3147_two18
Fabrikam, Inc.
Src ERP: DynamicsGP
Version Major: 18
Version Minor: 0
Version Build: 400
Historical Cutoff: 0

Definitions Lookup Sources Rounding

OrgUnit: {SEG1} + Clear ☐ Use CompanyDB as OrgUnit

Object: {SEG2} + Clear

Display Revenues As
☐ Negative Values ☒ Positive Values

Save Definitions: Saves Period labels, Imports OrgUnits and Objects into DynamicBudgets
Imports accounts from company database to DynamicBudgets
Creates company specific views in DynamicBudgets and company databases
☐ Create legacy database objects on 'Save'

Save Company (only): Saves company definition attributes only
Does not import orgunits, objects or accounts
Does not renew any of the database objects



When the message appears, **click on OK**. Then contact Dynamic Budgets support for assistance.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynamicbudgets

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

System Management > Companies > Manage Company Databases

Linked Servers: <select>

Available ERP Companies:

Save Company Attributes Delete Purge

Print Export to Excel Print to PDF AutoSize Columns

CompanyDB	Label (15 char max)	CompanyName
DB3147_two18	DB3147_two18	Fabrikam, Inc.

Company Definitions.

Segment definitions Period labels Budget Variances Fixed Assets Year Labels

CompanyDB: DB3147_two18
 Label: Fabrikam, Inc.
 Src ERP: DynamicsGP
 Version Major: 18
 Version Minor: 0
 Version Build: 400
 Historical Cutoff: 0

Definitions Lookup Sources Rounding

OrgUnit: {SEG1} + Clear ☐ Use CompanyDB as OrgUnit

Object: {SEG2} + Clear

Save Definitions: Saves Period Labels, Imports and Creates Company Objects, ☐ Create Company Objects

Save Company (only): Saves company information, Does not import orgunits, objects or accounts, Does not renew any of the database objects

Message

If you have budget or forecast details in Dynamic Budgets, please first contact technical support before proceeding for assistance in converting the format of your existing data first.

To Change Revenue format you must click (Generate View for Dynamic Budgets) button and then after successful completion, click the (Save Definitions) button.

OK



That's It. You're Done.



That's It. You're Done.