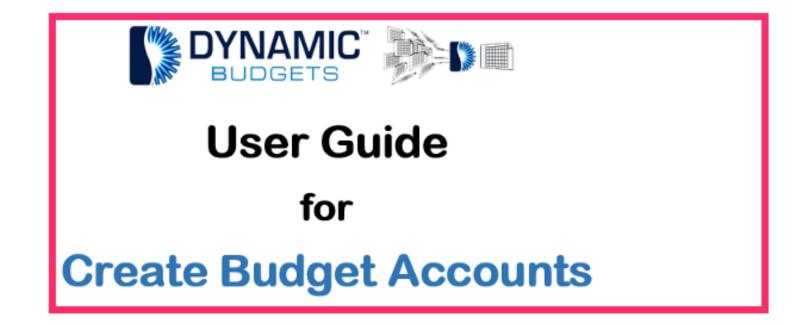


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Dynamic Budgets User Guide for Create Budget Accounts





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Create Budget Accounts Prerequisite Steps 1. Synchronize Chart of Accounts 2. Manage Objects-verify all desired accounts are marked "IsBudgeted" 3. Manage OrgUnits-verify all desired accounts are marked "IsBudgeted"



Create Budget Accounts Prerequisite Steps

- 1. Synchronize Chart of Accounts
- 2. Manage Objects verify all desired accounts are marked "IsBudgeted"
- 3. Manage OrgUnits verify all desired accounts are marked "IsBudgeted"



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Purpose: Create Budget Accounts This procedure is creating budgeting accounts to store budget values.





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#### Click on System Management. Ð

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X 🔨 Tools 🙆 System Management 🧧 Allocations 💲 Payroll 🏰 Users Management

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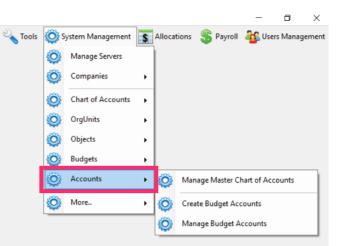


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### Click on Accounts.

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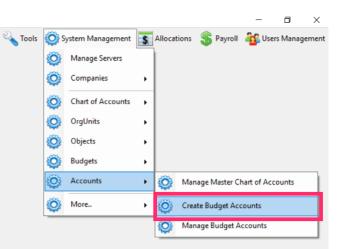


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## Click on the CompanyDB dropdown list. Make a selection. In this example, we will select DB3147\_twol8.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynamic	budgets					_	٥	×
🥃 File 📑 Budgets 👆 Variances 📊 Reports		🔌 Tools	System Management	\$ Allocations	🏐 Payroll	🏭 Users	Manager	ment
System Management > Accounts > Create Budget Accounts							0 -	×
CompanyDB* <al>  BudgetID D83147, two 18 Proceed Preselect all accounts</al>	If an expected budget is not in the list above, please go to Manage Budgets and ensure that the Budget is checked as 'IsBudgeted', and is not checked as 'Locked'. Manage Budgets							
Budget Accounts Checklist								
If your any accounts are missing check the following								
1) Account is/was marked as inactive								
1a) in next screen choose Include Inactive Accounts in search option								
1b) in sync COA try updating account attributes if you recentl;y update	d the active status of the accounts(s)							
2) Orgunit is checkmarked IsBudgeted <u>Manage OrgUnits</u>								
3) Object is checkmarked IsBudgeted Manage Objects								
4) New Accounts have been syncronized and added to Dynamic Budgets	Synchronize Chart of Accounts							
5) If you are using account level security - have you granted access to the	accounts?							
6) if none of the above contact <u>support@dynamicbudgets.com</u>								



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#### UG-Create Budget Accounts

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Click on the **BudgetID** dropdown list. Make a selection. In this example, we will select, test 2019. Note: If the BudgetID is not on the list, go to manage budgets.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynamic	budgets					_	٥	$\times$
📷 File 📑 Budgets 🕂 Variances 📊 Reports		🔌 Tools	🔅 System Management	\$ Allocations	🏐 Payroll	🏭 Users	Manager	ment
System Management > Accounts > Create Budget Accounts							0 -	×
CompanyDB* DB3147_two18 ~ BudgetID test 2019 ~ test 2019 Preselect all accounts	If an expected budget is not in the list above, please go to Manage Budgets and ensure that the Budget is checked as 'IsBudgeted', and is not checked as 'Locked'. Manage Budgets							
Budget Accounts Checklist								
If your any accounts are missing check the following								
1) Account is/was marked as inactive								
1a) in next screen choose Include Inactive Accounts in search option								
1b) in sync COA try updating account attributes if you recentl;y updated	d the active status of the accounts(s)							
2) Orgunit is checkmarked IsBudgeted <u>Manage OrgUnits</u>								
3) Object is checkmarked IsBudgeted Manage Objects								
4) New Accounts have been syncronized and added to Dynamic Budgets	Synchronize Chart of Accounts							
5) If you are using account level security - have you granted access to the a	accounts?							
6) if none of the above contact <u>support@dvnamicbudgets.com</u>								



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In the Manage Budgets screen: 1. Verify the locked status reads Not Locked. 2. Verify the desired budgetid is checkmarked ISBudgeted.

2 D	ynamicBudgets - PH	IUBERI \P. Hubert - 1	84.1/2.195.139,25000	) - DB314	/_dynamicbudget	S										_	
•	File <b>\$</b> Budgets	Variances									🔦 Tool	ls 🔅 System N	lanagement	\$ Allocat	ons   🏐 Pa	yroll 🍇 Use	rs Management
Ci	reate Budget Accour	nts Manag	e Budgets 🛛 🗙														•
	System Managemen	nt > Budgets > Ma	nage Budgets														0 🔻 ×
c	companyDB <all></all>	~	Show Budgets														
	Link to existing data s	sets in the ERP				Create new dat	ta sets in Dyna	micBudgets									
	Available Actuals a	and Budgets				Enter Name	for New Budge	et	Create for:								
			✓ Add s	elected Bu	ldget				Selected Compa	any All Comp	anies						
			Ad	d All Budge	ts		Budge	t Year # of Year	s Create for:								
		1	Add Selected Budge	t for All Co	mpanies	Historical Av				any All Comp	anies						
		L	Add Scietted Bodge		inponico												
						y e.g.	, Historical Avg	) for FY2019 and 3 do	sed years: (2015 - 201	[/]							
				>													
	Save Budgets	🗙 Delete Budget	Show Company	/ lags 📑													
	Print 🛛 💽 Export to	o Excel 🛛 📆 Print to	PDF 📰 AutoSize C	olumns										_		Ro	ws:8 A- A+
Com	panyDB	BudgetID (15)	Description (30)	Year	FromDate	ToDate	Source	Locked	Actual	Imported	SortOrder	UserRoleAccess	IsBudgeted	🗌 I Sum	mary 🗌	InLookups	InReports
			A	=	=	=		A	A	A	=	A					
	DB3147_two18	2023 Actual	2023 Actual	2023	01/01/2023	12/31/2023	ERP	Not Locked	True	True	0	Application Use			$\checkmark$		
	DB3147_two18	2024 Actual	2024 Actual	2024	01/01/2024	12/31/2024	ERP	Not Locked	True	True	0	Application Use			$\checkmark$		
	DB3147_two18	BUDGET 2005	Budget 2025	2025	01/01/2025	12/31/2025	ERP	Not Locked	False	True	0	Application Use					
	DB3147_two18	BUDGET 2006	Budget 2026	2026	01/01/2026	12/31/2026	ERP	Not Locked	False	True	0	Application Use			$\checkmark$		
	DB3147_two18	BUDGET 2008	Budget 2028	2028	01/01/2028	12/31/2028	ERP	Not Locked	False	True	0	Application Use			$\checkmark$		
	DB3147_two18	BUDGET 4	Budget 2027	2027	01/01/2027	12/31/2027	ERP	Not Locked	False	True	0	Application Use			$\checkmark$		
	DB3147_two18	BUDGET3	Budget 2024	2024	01/01/2024	12/31/2024	ERP	Not Locked	False	True	0	Application Use			$\checkmark$		



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## Click in the box next to Preselect all accounts.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynamicb	udgets		– o ×
🛜 File 🛐 Budgets 🕂 Variances 📊 Reports		💫 Tools 🔅 System Management 🛐 Allocations	💲 Payroll 🛛 🍇 Users Management
System Management > Accounts > Create Budget Accounts			0 💌 🗙
CompanyDB*       DB3147_two18         BudgetID       test 2019         Proceed       Preselect all accounts	If an expected budget is not in the list above, please go to Manage Budgets and ensure that the Budget is checked as 'IsBudgeted', and is not checked as 'Locked'. <u>Manage Budgets</u>		
Budget Accounts Checklist			
If your any accounts are missing check the following			
1) Account is/was marked as inactive			
1a) in next screen choose Include Inactive Accounts in search option			
1b) in sync COA try updating account attributes if you recentl;y updated	the active status of the accounts(s)		
2) Orgunit is checkmarked IsBudgeted Manage OrgUnits			
3) Object is checkmarked IsBudgeted Manage Objects			
4) New Accounts have been syncronized and added to Dynamic Budgets	Synchronize Chart of Accounts		
5) If you are using account level security - have you granted access to the a	ccounts?		
6) if none of the above contact <u>support@dynamicbudgets.com</u>			



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## Click on Proceed.

- 0 ×
🔌 Tools 🔅 System Management 🔚 Allocations 💲 Payroll 韸 Users Management
0 💌 x



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#### **UG-Create Budget Accounts**

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Note: You can choose to include or exclude inactive accounts with this dropdown list. For this example, we will include inactive accounts. See a separate tutorial for how to handle budgeting for inactive accounts.

anvDB* DB31 ettD test : Iget Account our any acco account is/wa 1a) in next s	-	Prev	dd Budget Ad	ccounts Preview <b>s to be added</b>	and ensure that the 'Locked'.	Budget is checked as 'Ist	, please go to Manage Bu Budgeted', and is not che	udgets cked as					0 -
ettD test : Iget Account our any acco Account is/wa 1a) in next s	ts Checklist unts are missing check the	Prev	iew: Account		and ensure that the 'Locked'.	Budget is checked as 'Ist	, please go to Manage Bu Budgeted , and is not che	idgets cked as					
our any acco account is/wa 1a) in next s	ts Checklist unts are missing check the	Prev	iew: Account										
our any acco account is/wa 1a) in next s	unts are missing check the	Exclu		s to be added	CompanyDB: DB3						- 0	×	
our any acco account is/wa 1a) in next s	unts are missing check the		ula la activa A			147_two18 BudgetID	test 2019 Total acco	ounts: 185 Sele	cted: 185				
1a) in next s	s marked as inactive		ide inactive A ide Inactive A	ccounts 🔻	🥝 Create Acco	ounts   🗙 Cancel					Hide Tag	gs	
		Inclu	ide inactive A		Object	AcctNum	Description	Active	DoNotBudget	ActiveInBudgets	ActiveInActuals	^	
th) in sums (	creen choose Include Inac				A	A	A	A		A	A		
1D) In Sync (	COA try updating account a	•		000	4100	000-4100-00	Sales	Active					
-	ckmarked IsBudgeted		$\checkmark$	000	4110	000-4110-01	US Sales - Retail/	Active					
	kmarked IsBudgeted			000	4110	000-4110-02	US Sales - Finishe	Active			_		
	have been syncronized an			000	4111	000-4111-01	Canadian Sales -	Active				-	
	ng account level security - I			000	4111	000-4111-02	Canadian Sales -	Active			_	-	
f none of the	above contact <u>support</u>			000	4112	000-4112-01	AustralAsian Sale	Active				- 1	
				000	4112	000-4112-02	AustralAsian Sale	Active				- 1	
				000	4114	000-4114-01	Germany Sales -	Active				- 1	
				000	4114	000-4114-02	Germany Sales -	Active					
				000	4115	000-4115-01	United Kingdom S						
				000	4115	000-4115-02	United Kingdom S						
				000	4116	000-4116-01	South Africa - Ret	Active					
				000	4116	000-4116-02	South Africa Sales						
				000	4117	000-4117-01	Singapore Sales -	Active					



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#### **UG-Create Budget Accounts**

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# Verify the accounts look familiar. Click on the green space for Orgunit, Object, and AcctNum columns to perform a search.

File 💲	Budgets 🗕 Variances 📊 Re	ports							6	💊 Tools  🏹 Syster	m Management	\$ Allocations	🏐 Payroll	Clasers Managen
stem Manage	ement > Accounts > Create Budg	jet Acc	ounts											0 💌
mpanyDB* dgetID	DB3147_two18	• •			If an expected budg and ensure that the 'Locked'.	et is not in the list above, Budget is checked as 'IsBu	please go to Manage Bu udgeted', and is not che	idgets cked as						
	Proceed	D/	Add Budget A	ccounts Preview	v						- 0	×		
		Prev	view: Account	ts to be added	CompanyDB: DB3	147_two18 BudgetID:	test 2019 Total acco	ounts: 185 Sel	ected: 185					
f your any	counts Checklist accounts are missing check the	f Excl	ude Inactive A	ccounts •	📀 Create Acco	ounts   🗙 Cancel					Hide Tag	gs		
	is/was marked as inactive	Selec	t G	Oral Init	Object	AcctNum	Description	Active	DoNotBudget	ActiveInBudgets	ActiveInActuals	•		
	next screen choose Include Inac			A	A		Δ	A	A		A			
	sync COA try updating account a	t 🕨		000	4100	000-4100-00	Sales	Active						
	s checkmarked IsBudgeted	4		000	4110	000-4110-01	US Sales - Retail/	Active						
	checkmarked IsBudgeted	4		000	4110	000-4110-02	US Sales - Finishe	Active	******					
	ounts have been syncronized an			000	4111	000-4111-01	Canadian Sales -	Active				-		
	e using account level security -			000	4111	000-4111-02	Canadian Sales -	Active						
) if none o	f the above contact support	2		000	4112	000-4112-01	AustralAsian Sale	Active						
				000	4112	000-4112-02	AustralAsian Sale	Active				-		
				000	4114	000-4114-01	Germany Sales -	Active						
				000	4114	000-4114-02	Germany Sales -	Active						
				000	4115	000-4115-01	United Kingdom S							
				000	4115	000-4115-01								
							United Kingdom S							
				000	4116	000-4116-01	South Africa - Ret	Active						
				000	4116	000-4116-02	South Africa Sales	Active						
			$\checkmark$	000	4117	000-4117-01	Singapore Sales -	Active				~		



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## Uncheck any accounts that do not need to be created or do not look familiar.

File 🛐 Budgets 🕂 Variances 📊 Rep	orts							2	💊 Tools 🛛 🏹 Syster	m Management	S Allocations	🏐 Payroll	鍲 Users Managem
stem Management > Accounts > Create Budge	et Acc	ounts											0 💌
udgetID test 2019				If an expected budg and ensure that the 'Locked'.	et is not in the list above Budget is checked as 'Ist	, please go to Manage Bu Budgeted', and is not che	idgets cked as						
Proceed	D	Add Budget A	counts Preview	<i>I.</i> .						- 0	×		
and and the second of the shifts t	Prev	view: Account	s to be added	CompanyDB: DB3	147_two18 BudgetID	test 2019 Total acco	ounts: 185 Sel	ected: 185					
Budget Accounts Checklist If your any accounts are missing check the f	Incl	ude Inactive A	ccounts 💌	🕜 Create Acco	ounts   🗙 Cancel					Hide Ta	igs		
1) Account is/was marked as inactive	Selec	t 🗌	] OrgUnit	Object	AcctNum	Description	Active	DoNotBudget	ActiveInBudgets	ActiveInActual	s ^		
1a) in next screen choose Include Inacti			A	A	A	A	A	A	A	A			
1b) in sync COA try updating account at	•		000	4100	000-4100-00	Sales	Active						
2) Orgunit is checkmarked IsBudgeted M			000	4110	000-4110-01	US Sales - Retail/	Active						
B) Object is checkmarked IsBudgeted  M			000	4110	000-4110-02	US Sales - Finishe	Active						
4) New Accounts have been syncronized and a second syncronized and a			000	4111	000-4111-01	Canadian Sales -	Active						
<ul> <li>i) If you are using account level security - h</li> <li>ii) if none of the above contact support@</li> </ul>			000	4111	000-4111-02	Canadian Sales -	Active				_		
<ol><li>if none of the above contact <u>support@</u></li></ol>			000	4112	000-4112-01	AustralAsian Sale	Active				_		
			000	4112	000-4112-02	AustralAsian Sale	Active						
			000	4114	000-4114-01	Germany Sales -	Active						
			000	4114	000-4114-02	Germany Sales -	Active				-		
			000	4115	000-4115-01	United Kingdom S	Active	Tree of the second			_		
			000	4115	000-4115-02	United Kingdom S					-		
			000	4116	000-4116-01	South Africa - Ret	Active	Yes and the second seco			-		
			000	4116	000-4116-02	South Africa Sales	Active						
			000	4117	000-4117-01	Singapore Sales -							



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## **Verify** the number of accounts listed is accurate.

ile 💲 Budgets 🕂 Variances 📊 Repo	rts							2	💊 Tools 🛛 🏹 Syster	m Management	\$ Allocations	🏐 Payroll	む Users Manager
em Management > Accounts > Create Budge	t Acco	ounts											0 💌
ppanyDB* DB3147_two18 ~ getID test 2019 ~				If an expected bud and ensure that the 'Locked'.	get is not in the list above, e Budget is checked as 'IsB	, please go to Manage Bu Judgeted', and is not che	udgets cked as						
Proceed	N 🔇	dd Budget Aco	counts Preview							- 0	×		
	Prev	iew: Accounts	to be added	CompanyDB: DB3	147_two18 BudgetID:	test 2019 Total acco	ounts: 185 Sel	ected: 185					
udget Accounts Checklist your any accounts are missing check the f	Exclu	ude Inactive Ac	counts 💌	🕜 Create Acc	ounts   🗙 Cancel					Hide Tags			
	Select		OrgUnit	Object	AcctNum	Description	Active	DoNotBudget	ActiveInBudgets	ActiveInActuals	^		
1a) in next screen choose Include Inacti			A	A	A	A	A	A	A	A			
1b) in sync COA try updating account at	•		000	4100	000-4100-00	Sales	Active						
Orgunit is checkmarked IsBudgeted M			000	4110	000-4110-01	US Sales - Retail/	Active						
Object is checkmarked IsBudgeted M			000	4110	000-4110-02	US Sales - Finishe	Active						
New Accounts have been syncronized and			000	4111	000-4111-01	Canadian Sales -	Active				-		
If you are using account level security - h- if none of the above contact support@			000	4111	000-4111-02	Canadian Sales -	Active				-		
if none of the above contact <u>support@</u> .			000	4112	000-4112-01	AustralAsian Sale	Active				-		
			000	4112	000-4112-02	AustralAsian Sale	Active						
			000	4114	000-4114-01	Germany Sales -	Active				-		
			000	4114	000-4114-02	Germany Sales -	Active				-		
			000	4115	000-4115-01	United Kingdom S	Active	**			-		
			000	4115	000-4115-02	United Kingdom S					-		
			000	4116	000-4116-01	South Africa - Ret	Active				-		
			000	4116	000-4116-02	South Africa Sales	Active				-		
		Ľ									-		



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## Click on Create Accounts.

File 💲 Budgets 🗕 Variances 📊 Rep	orts							é	💊 Tools  🏹 Syster	n Management	\$ Allocation	s 💲 Payroll	age Users Manager
ystem Management > Accounts > Create Budg	et Acco	ounts											0 -
CompanyDB* DB3147_two18 SudgetID test 2019				If an expected budg and ensure that the 'Locked'.	et is not in the list abov Budget is checked as 'I	ve, please go to Manage Bu isBudgeted', and is not che	dgets cked as						
Proceed	<b>D</b> A	dd Budget A	ccounts Preview	I. <b>.</b>						- 0	×		
	Prev	iew: Account	ts to be added	CompanyDB: DB31	47_two18 Budgetl	D: test 2019 Total acco	unts: 185 Se	ected: 185					
Budget Accounts Checklist If your any accounts are missing check the f	Exclu	ide Inactive A	ccounts 🔹	📀 Create Acco	unts 🗙 Canc	el				Hide Tag	5		
1) Account is/was marked as inactive	Select		OrgUnit	Object	AcctNum	Description	Active	DoNotBudget	ActiveInBudgets	ActiveInActuals	^		
1a) in next screen choose Include Inact			A				A	A		A			
1b) in sync COA try updating account at	•		000	4100	000-4100-00	Sales	Active						
2) Orgunit is checkmarked IsBudgeted M		$\checkmark$	000	4110	000-4110-01	US Sales - Retail/	Active						
3) Object is checkmarked IsBudgeted M		$\checkmark$	000	4110	000-4110-02	US Sales - Finishe	Active						
4) New Accounts have been syncronized and			000	4111	000-4111-01	Canadian Sales -	Active				-		
5) If you are using account level security - h			000	4111	000-4111-02	Canadian Sales -	Active				-		
6) if none of the above contact <u>support@</u>			000	4112	000-4112-01	AustralAsian Sale	Active				-		
			000	4112	000-4112-02	AustralAsian Sale	Active						
			000	4114	000-4114-01	Germany Sales -	Active				- 1		
			000	4114	000-4114-02	Germany Sales -	Active						
			000	4115	000-4115-01	United Kingdom S					-		
			000	4115	000-4115-02	United Kingdom S							
			000	4115	000-4116-01	South Africa - Ret	Active				-		
			000	4116		South Africa Sales					- 1		
					000-4116-02						-		
	<	$\checkmark$	000	4117	000-4117-01	Singapore Sales -	Active		1	1	>		



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### UG-Create Budget Accounts

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A message box will appear to display the number of accounts added successfully. Click on OK.

DynamicBudgets - PHUBERT\P. Hubert - 184.172		,20000 00	saynanna						and the second sec				- 0
File 🛐 Budgets 👆 Variances 📊 Rep	orts							0	💊 Tools  🏹 Syster	n Management	\$ Allocations	🏐 Payroll	Contraction and the series of
stem Management > Accounts > Create Budg	et Accou	unts											0 💌
ompanyDB* DB3147_two18 ~	•			If an expected budg	et is not in the list above, Budget is checked as 'IsB	please go to Manage Bu	udgets						
udgetID test 2019 ~	-			and ensure that the 'Locked'.	Budget is checked as 'IsB	udgeted, and is not che	cked as						
Proceed	D Ad	id Budget A	ccounts Previe	Ne						- 0	×		
	_				47_two18 BudgetID:	test 2010 Total acco	unter 195 Salact	ad: 195					
Budget Accounts Checklist							Junes, 105 Sciect	.cu. 105			_		
If your any accounts are missing check the	f Exclud	de Inactive A	ccounts •	Create Acco	unts   🗙 Cancel	5.ee				Hide Tag	gs -		
1) Account is/was marked as inactive	Select		OrgUnit	Object	AcctNum	Description	Active	DoNotBudget	ActiveInBudgets	ActiveInActuals	^		
1a) in next screen choose Include Inact			A	A	A		A	A		A			
1b) in sync COA try updating account a	•		000	4100	000-4100-00	Sales	Active						
2) Orgunit is checkmarked IsBudgeted	4		000	4110	000-4110-01	US Sales - Retail/	Active				_		
3) Object is checkmarked IsBudgeted			000	4110	000-4110-02	LIC Cales - Finishe					_		
4) New Accounts have been syncronized and			000	4111	000-4: Message		×				-		
5) If you are using account level security - h			000	4111	000-4:						-		
6) if none of the above contact support@	2		000	4112	000-4:	185 accounts added	successfully						
			000	4112	000-4:								
			000	4114	000-41		ОК				- 1		
			000	4114	000-4114-02	Germany Sales -	Active				- 1		
			000	4115	000-4115-01	United Kingdom S	Active				-		
			000	4115	000-4115-02	United Kingdom S					-		
			000	4116	000-4116-01	South Africa - Ret	Active				-		
			000	4116	000-4116-02	South Africa Sales	Active				-		
			000	4117	000-4117-01	Singapore Sales -					-		
	<					angepore outer		1	1		>		



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## Click on the X to close.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynamicbudgets					- 0	$\times$
🔁 File 🛐 Budgets 👆 Variances 📊 Reports	🏹 Tools	🔅 System Management	S Allocations	🔓 Payroll 🧯	🚰 Users Manag	ement
System Management > Accounts > Create Budget Accounts					0	
CompanyDB*       DB3147_two18       If an expected budget is not in the list above, plear and ensure that the Budget is checked as "IsBudget 'Locked'.         BudgetID       test 2019       If an expected budget is checked as "IsBudget 'Locked'.         Proceed       Preselect all accounts       Manage Budgets						
Budget Accounts Checklist						
If your any accounts are missing check the following						
1) Account is/was marked as inactive						
1a) in next screen choose Include Inactive Accounts in search option						
1b) in sync COA try updating account attributes if you recentl;y updated the active status of the accounts(s)						
2) Orgunit is checkmarked IsBudgeted <u>Manage OrgUnits</u>						
3) Object is checkmarked IsBudgeted <u>Manage Objects</u>						
4) New Accounts have been syncronized and added to Dynamic Budgets Synchronize Chart of Accounts						
5) If you are using account level security - have you granted access to the accounts?						
6) if none of the above contact <u>support@dynamicbudgets.com</u>						



zgidwani

That's It. You're Done.



## That's It. You're Done.