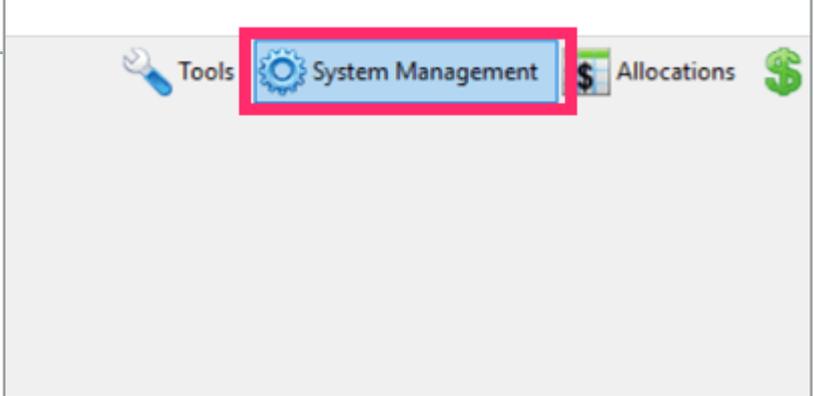
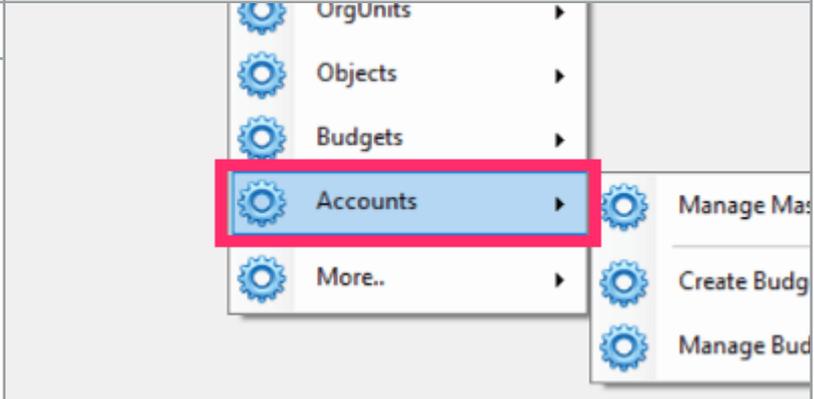
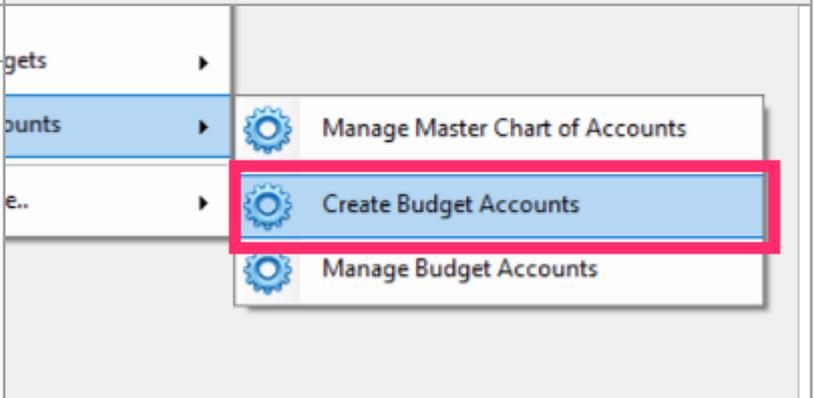
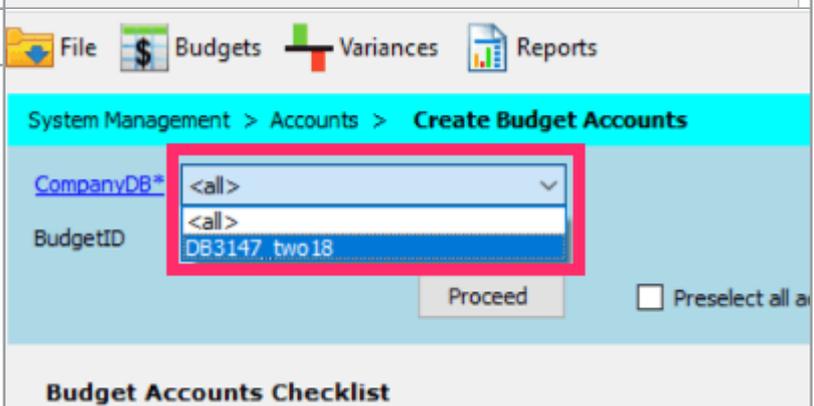


 <p>Dynamic Budgets User Guide for Create Budget Accounts</p> <p>1</p>	  <h2>User Guide for Create Budget Acco</h2>
 <p>Create Budget Accounts Prerequisite Steps</p> <ol style="list-style-type: none">1. Synchronize Chart of Accounts2. Manage Objects-verify all desired accounts are marked "IsBudgeted"3. Manage OrgUnits-verify all desired accounts are marked "IsBudgeted" <p>2</p>	  <h2>Create Budget Accounts Prere</h2> <ol style="list-style-type: none">1. Synchronize Chart of Accounts2. Manage Objects – verify all desired accou3. Manage OrgUnits – verify all desired acco
 <p>Purpose: Create Budget Accounts</p> <p>This procedure is creating budgeting accounts to store budget values.</p> <p>3</p>	  <h2>Create Budget Acco</h2> <p><i>Purpose:</i> This procedure is creating bu budget values.</p>

<p>4</p> <p>Click on System Management.</p>	
<p>5</p> <p>Click on Accounts.</p>	
<p>6</p> <p>Click on Create Budget Accounts.</p>	
<p>7</p> <p>Click on the CompanyDB dropdown list. Make a selection.</p> <p>In this example, we will select DB3147_two18.</p>	

8 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.

9 In the Manage Budgets screen:

1. Verify the **locked status** reads **Not Locked**.
2. Verify the desired **budgetid** is **checkmarked ISBudgeted**.

10 Click in the box next to **Preselect all accounts**.

11 Click on **Proceed**.

Locked	Actual	Imported	SortOrder
Not Locked	True	True	0
Not Locked	True	True	0
Not Locked	False	True	0
Not Locked	False	True	0
Not Locked	False	True	0
Not Locked	False	True	0
Not Locked	False	True	0
Not Locked	False	False	0

12

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.

13

Verify the accounts look familiar.

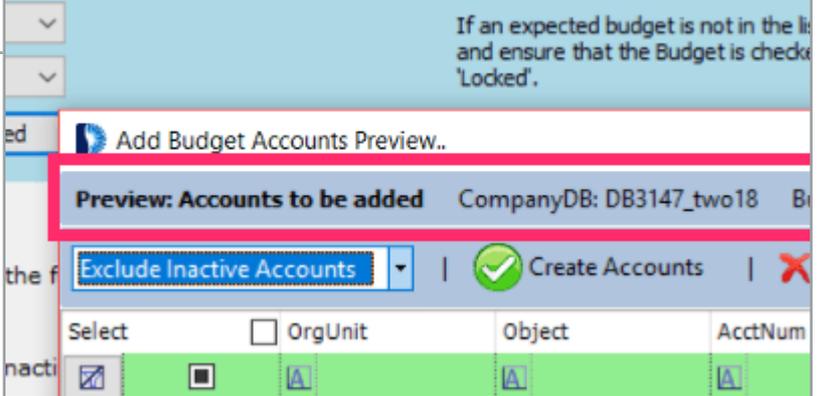
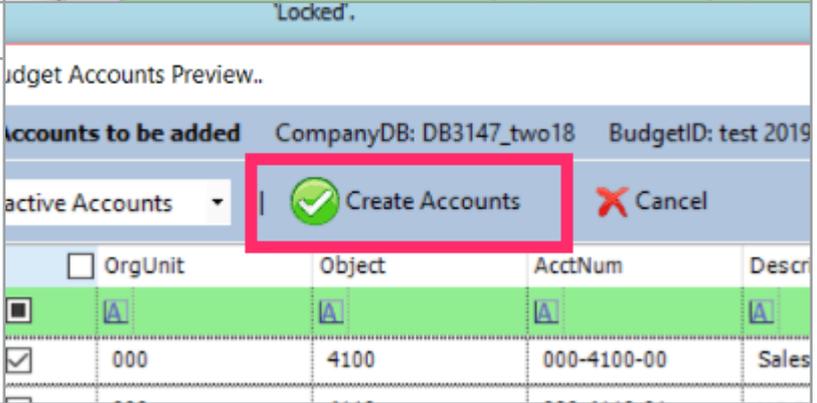
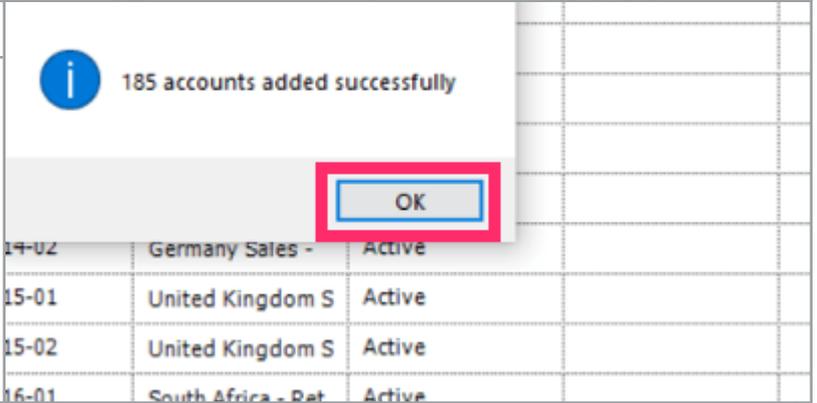
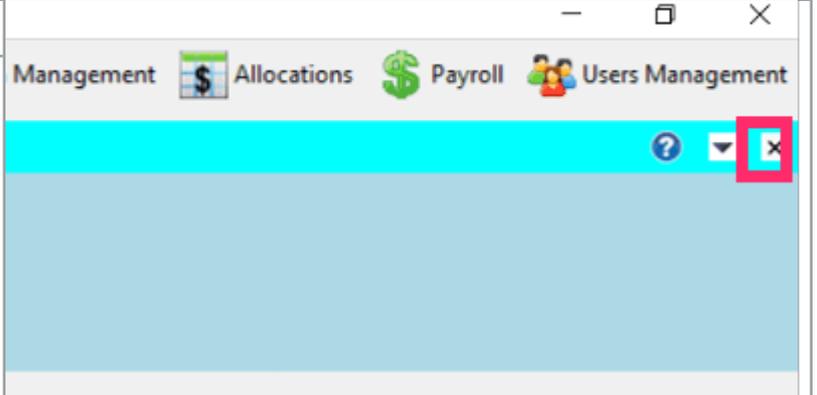
Click on the green space for Orgunit, Object, and AcctNum columns to perform a search.

14

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

OrgUnit	Object	AcctNum	Description
000	4100	000-4100-00	Sales
000	4110	000-4110-01	US Sa
000	4110	000-4110-02	US Sa
000	4111	000-4111-01	Canad

OrgUnit	Object	AcctNum	Description
000	4100	000	4100
000	4110	000	4110
000	4110	000	4110
000	4111	000	4111
000	4111	000	4111
000	4112	000	4112
000	4112	000	4112
000	4114	000	4114
000	4114	000	4114
000	4115	000	4115
000	4115	000	4115
000	4116	000	4116
000	4116	000	4116
000	4117	000	4117

<p> Verify the number of accounts listed is accurate.</p>	<p>15</p> 
<p> Click on Create Accounts.</p>	<p>16</p> 
<p> A message box will appear to display the number of accounts added successfully.</p> <p>Click on OK.</p>	<p>17</p> 
<p> Click on the X to close.</p>	<p>18</p> 



That's It. You're Done.

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DYNAMIC™
BUDGETS



That's It. You're Done.