



Dynamic Budgets User Guide for Create Budget Accounts, Budget Not Listed



# **User Guide**

## **for**

# **Create Budget Accounts, Budget Not Listed**



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”



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

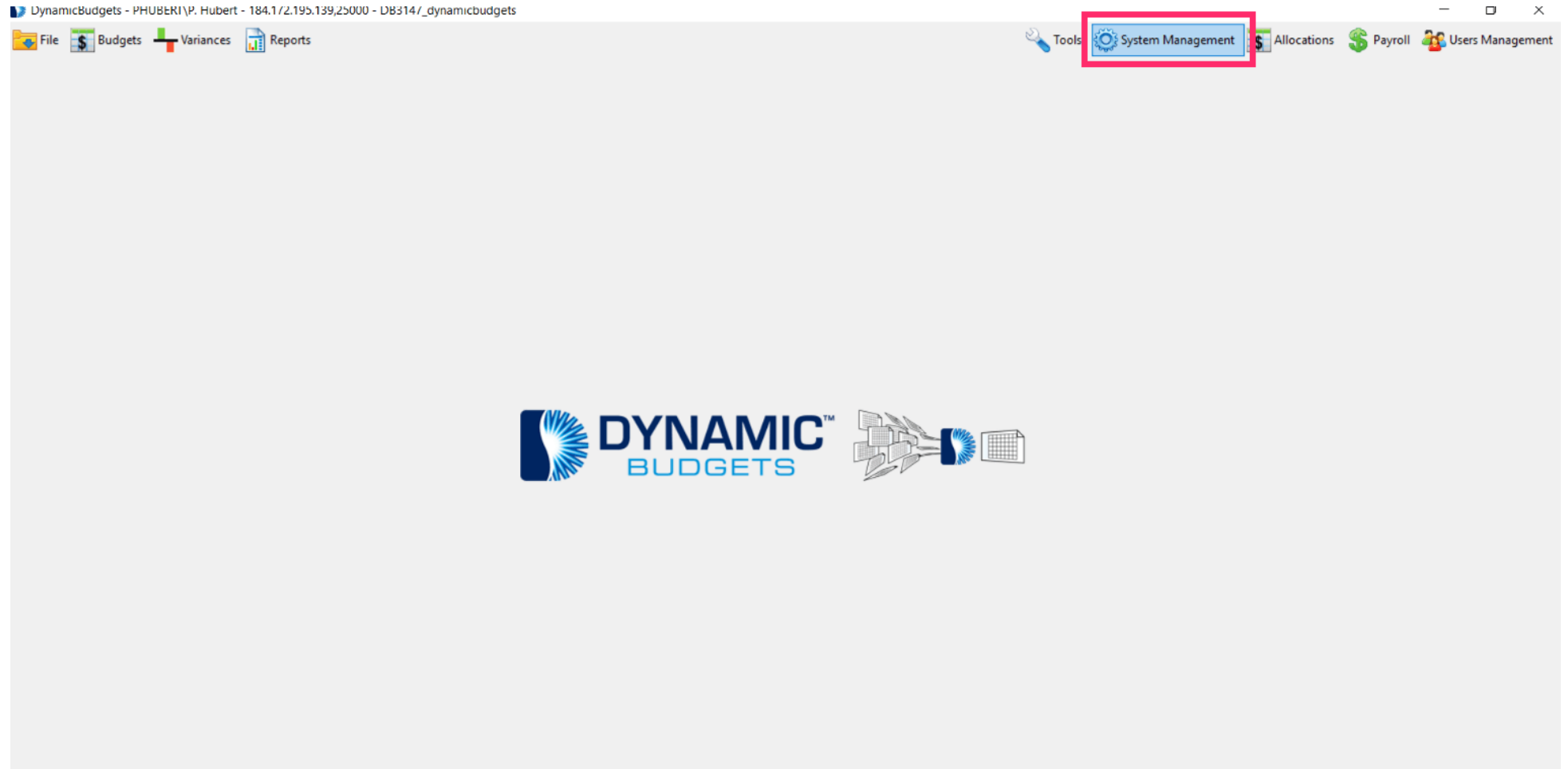


### Create Budget Accounts

*Purpose:* This procedure is creating budgeting accounts to store budget values.

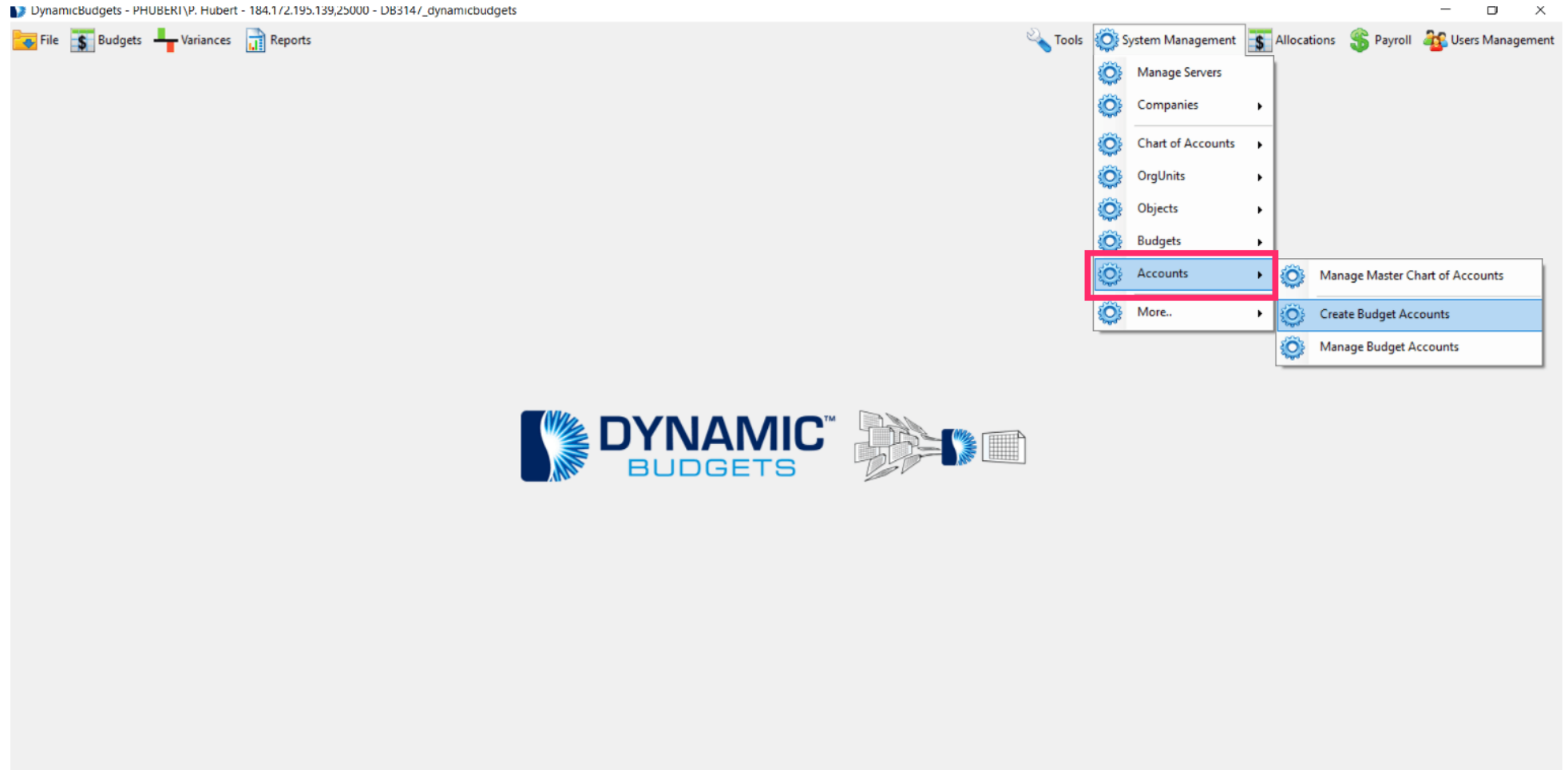


Click on **System Management**.



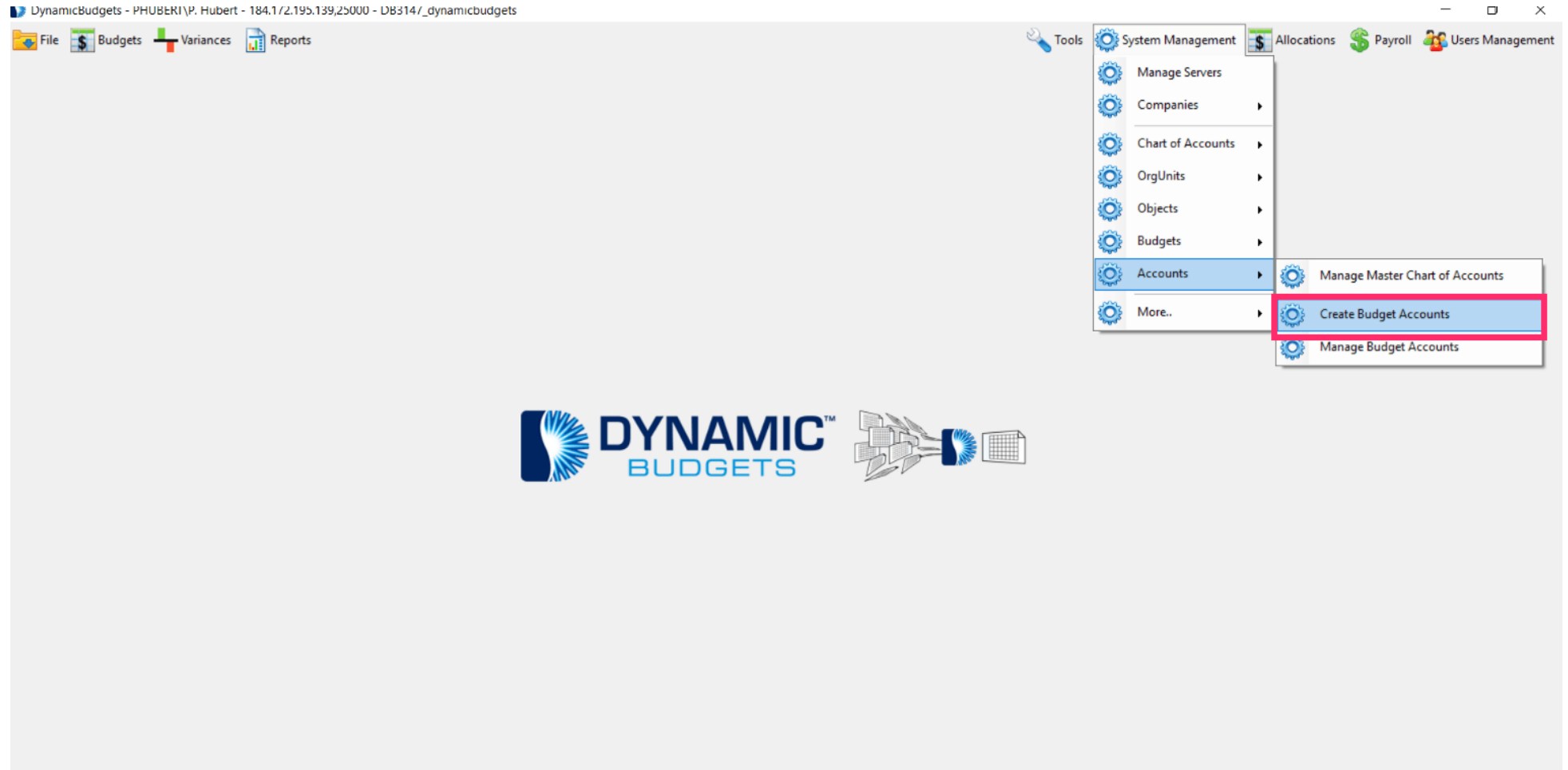


Click on **Accounts**.





Click on **Create Budget Accounts**.





Click on the **CompanyDB** dropdown list. Make a selection. In this example, we will select **DB3147\_two18**.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147\_dynamicbudgets

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

System Management > Accounts > Create Budget Accounts

CompanyDB: DB3147\_two18  
 BudgetID: <all>  
 DB3147\_two18

Proceed ☐ Preselect all accounts [Manage Budgets](#)

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'.

**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 recently 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 synchronized 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 [support@dynamicbudgets.com](mailto:support@dynamicbudgets.com)



Click on the **BudgetID** dropdown list. Make a selection. In this example, we want to select **2020 test**, but its missing from the list. Note: There are 2 reasons the budget will not be listed in the dropdown list.

DynamicBudgets - PHUBERI\P. Hubert - 184.172.195.139,25000 - DB3147\_dynamicbudgets

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

System Management > Accounts > Create Budget Accounts

CompanyDB\* DB3147\_two18

BudgetID test 2019

☐ Preselect all accounts [Manage Budgets](#)

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'.

### 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 recently 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 synchronized 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 [support@dynamicbudgets.com](mailto:support@dynamicbudgets.com)





**Reason 1:** The budget is not checkmarked IsBudgeted. **Reason 2:** The budget is locked.

DynamicBudgets - PHUBERI\P. Hubert - 184.1/2.195.139,25000 - DB314/\_dynamicbudgets

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

System Management > Accounts > Create Budget Accounts

CompanyDB: DB3147\_two18

BudgetID: 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 recently 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 synchronized 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 [support@dynamicbudgets.com](mailto:support@dynamicbudgets.com)



Now Click **System Management**

DynamicBudgets - PHUBERI\P. Hubert - 184.1/2.195.139,25000 - DB3147\_dynamicbudgets

File Budgets Variances Reports Tools **System Management** Allocations Payroll Users Management

System Management > Accounts > **Create Budget Accounts**

CompanyDB: DB3147\_two18  
 BudgetID: test 2019  
 Proceed ☐ Preselect all accounts [Manage Budgets](#)

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'.

**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 recently 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 synchronized 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 [support@dynamicbudgets.com](mailto:support@dynamicbudgets.com)



Click on **Budgets**.

DynamicBudgets - PHUBERI\P. Hubert - 184.1/2.195.139,25000 - DB314/\_dynamicbudgets

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

System Management > Accounts > Create Budget Accounts

CompanyDB: DB3147\_two18  
 BudgetID: test 2019  
 Proceed ☐ Preselect all accounts [Manage Budgets](#)

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'.

**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 recently 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 synchronized 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 [support@dynamicbudgets.com](mailto:support@dynamicbudgets.com)

Manage Servers  
 Companies  
 Chart of Accounts  
 OrgUnits  
 Objects  
**Budgets**  
 Accounts  
 More..

Manage Budgets  
 Define Budgets Forms (Basic Budget Entry)  
 Define Budgets Forms (Custom Budget Entry)



Click on **Manage Budgets**.

DynamicBudgets - PHUBERI\P. Hubert - 184.1/2.195.139.25000 - DB314/\_dynamicbudgets

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

System Management > Accounts > Create Budget Accounts

CompanyDB: DB3147\_two18  
 BudgetID: test 2019  
 Proceed ☐ Preselect all accounts [Manage Budgets](#)

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'.

**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 synchronized 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 [support@dynamicbudgets.com](mailto:support@dynamicbudgets.com)

**System Management Menu:**

- Manage Servers
- Companies
- Chart of Accounts
- OrgUnits
- Objects
- Manage Budgets**
- Define Budgets Forms (Basic Budget Entry)
- Define Budgets Forms (Custom Budget Entry)
- Budgets
- Accounts
- More..



Click on **Show Budgets.**

DynamicBudgets - PHUBERI\P. Hubert - 184.1/2.195.139,25000 - DB314/\_dynamicbudgets

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Create Budget Accounts Manage Budgets

System Management > Budgets > Manage Budgets

CompanyDB: DB3147\_two18 **Show Budgets**

Link to existing data sets in the ERP

Available Actuals and Budgets

Add Selected Budget

Add All Budgets

Add Selected Budget for All Companies

Create new data sets in DynamicBudgets

Enter Name for New Budget

Create for: Selected Company All Companies

Budget Year: 2018 # of Years: 3

Create for: Selected Company All Companies

e.g. Historical Avg for FY2019 and 3 closed years: (2015 - 2017)

Save Budgets Delete Budget Show Company Tags

Print Export to Excel Print to PDF AutoSize Columns

A- A+



Note: We see the 2020 Test budget listed below. The budget is locked and NOT check IsBudgeted.

DynamicBudgets - PHUBERT\N. Hubert - 184.172.195.139,25000 - DB3147\_dynamicbudgets

File Budgets Variances Reports

Create Budget Accounts Manage Budgets

System Management > Budgets > Manage Budgets

CompanyDB: DB3147\_two18 Show Budgets

Link to existing data sets in the ERP

Available Actuals and Budgets

Add Selected Budget

Add All Budgets

Add Selected Budget for All Companies

Create new data sets in DynamicBudgets

Enter Name for New Budget

Create for: Selected Company All Companies

Budget Year: 2018 # of Years: 3

Create for: Selected Company All Companies

e.g. Historical Avg for FY2019 and 3 closed years: (2015 - 2017)

Save Budgets Delete Budget Show Company Tags

Print Export to Excel Print to PDF AutoSize Columns

CompanyDB	BudgetID (15)	Description (30)	Year	FromDate	ToDate	Source	Locked	Actual	Imported	SortOrder	UserRoleAccess	IsBudgeted	InSummary	InLookups	InReports
DB3147_two18	2020 Test	2020 Test	2018	03/01/2018	03/01/2018	DynamicB	Locked	False	False	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	2020 Actual	2020 Actual	2020	01/01/2020	12/31/2020	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	2024 Actual	2024 Actual	2024	01/01/2024	12/31/2024	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 2005	Budget 2025	2025	01/01/2025	12/31/2025	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 2006	Budget 2026	2026	01/01/2026	12/31/2026	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 2008	Budget 2028	2028	01/01/2028	12/31/2028	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 4	Budget 2027	2027	01/01/2027	12/31/2027	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET3	Budget 2024	2024	01/01/2024	12/31/2024	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	test 2019	test 2019	2018	02/01/2018	02/01/2018	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Rows: 9 A- A+



Click on **Locked**.

DynamicBudgets - PHUBERI\P. Hubert - 184.1/2.195.139,25000 - DB3147\_dynamicbudgets

File Budgets Variances Reports

Create Budget Accounts Manage Budgets

System Management > Budgets > Manage Budgets

CompanyDB: DB3147\_two18 Show Budgets

Link to existing data sets in the ERP

Available Actuals and Budgets

Add Selected Budget

Add All Budgets

Add Selected Budget for All Companies

Create new data sets in DynamicBudgets

Enter Name for New Budget

Create for: Selected Company All Companies

Budget Year: 2018 # of Years: 3 Create for: Selected Company All Companies

e.g. Historical Avg for FY2019 and 3 closed years: (2015 - 2017)

Save Budgets Delete Budget Show Company Tags

Print Export to Excel Print to PDF AutoSize Columns Rows: 9 A- A+

CompanyDB	BudgetID (15)	Description (30)	Year	FromDate	ToDate	Source	Locked	Actual	Imported	SortOrder	UserRoleAccess	IsBudgeted	InSummary	InLookups	InReports
DB3147_two18	2020 Test	2020 Test	2018	03/01/2018	03/01/2018	DynamicB	Locked	False	False	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	2023 Actual	2023 Actual	2023	01/01/2023	12/31/2023	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	2024 Actual	2024 Actual	2024	01/01/2024	12/31/2024	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 2005	Budget 2025	2025	01/01/2025	12/31/2025	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 2006	Budget 2026	2026	01/01/2026	12/31/2026	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 2008	Budget 2028	2028	01/01/2028	12/31/2028	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 4	Budget 2027	2027	01/01/2027	12/31/2027	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET3	Budget 2024	2024	01/01/2024	12/31/2024	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	test 2019	test 2019	2018	02/01/2018	02/01/2018	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



Click on **Unlock Budget and Accounts**.

DynamicBudgets - PHUBERI\P. Hubert - 184.1/2.195.139,25000 - DB314/\_dynamicbudgets

**Set Locked Status - Budget Accounts**

**2020 Test**  
Budget is LOCKED

Locks / Unlocks budget only, does not change locked status for any of the accounts

Locks / Unlocks budget and sets the same locked status on all budget accounts as well

Print Export to Excel Print to PDF AutoSize Columns Rows: 322 A- A+

LOCKED	<input type="checkbox"/>	AccountNum	Account-Description	EDITSTATUS	ApprovalStatus	UpdatedOn
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	000-4100-00	Sales			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	000-4110-01	US Sales - Retail/Pa			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	000-4110-02	US Sales - Finished			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	000-4111-01	Canadian Sales - R			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	000-4111-02	Canadian Sales - Fi			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	000-4112-01	AustralAsian Sales -			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	000-4112-02	AustralAsian Sales -			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	000-4120-00	US Sales - Service			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	000-4121-00	Canadian Sales - S			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	000-4122-00	AustralAsian Sales -			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	000-4130-00	US Sales - Installati			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	000-4131-00	Canadian Sales - In			

DB3147\_two18 BUDGET 4 Budget 2027 2027 01/01/2027 12/31/2027 ERP [Not Locked](#) False True

DB3147\_two18 BUDGET3 Budget 2024 2024 01/01/2024 12/31/2024 ERP [Not Locked](#) False True

DB3147\_two18 test 2019 test 2019 2018 02/01/2018 02/01/2018 DynamicB [Not Locked](#) False False

Tools System Management Allocations Payroll Users Management

Rows: 9 A- A+

SortOrder	UserRoleAccess	IsBudgeted	<input type="checkbox"/> InSummary	<input type="checkbox"/> InLookups	<input type="checkbox"/> InReports
=		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>





Click on the red X to close this window.

DynamicBudgets - PHUBERI\P. Hubert - 184.1/2.195.139,25000 - DB314/\_dynamicbudgets

Set Locked Status - Budget Accounts

2020 Test  
Budget is NOT locked

Lock Budget Only Locks / Unlocks budget only, does not change locked status for any of the accounts

Lock Budget and Accounts Locks / Unlocks budget and sets the same locked status on all budget accounts as well

Save Locked Status on Accounts

Print Export to Excel Print to PDF AutoSize Columns Rows: 322 A- A+

LOCKED	AccountNum	Account-Description	EDITSTATUS	ApprovalStatus	UpdatedOn
<input checked="" type="checkbox"/>	000-4100-00	Sales			
<input type="checkbox"/>	000-4110-01	US Sales - Retail/Pa			
<input type="checkbox"/>	000-4110-02	US Sales - Finished			
<input type="checkbox"/>	000-4111-01	Canadian Sales - R			
<input type="checkbox"/>	000-4111-02	Canadian Sales - Fi			
<input type="checkbox"/>	000-4112-01	AustralAsian Sales -			
<input type="checkbox"/>	000-4112-02	AustralAsian Sales -			
<input type="checkbox"/>	000-4120-00	US Sales - Service			
<input type="checkbox"/>	000-4121-00	Canadian Sales - S			
<input type="checkbox"/>	000-4122-00	AustralAsian Sales -			
<input type="checkbox"/>	000-4130-00	US Sales - Installati			
<input type="checkbox"/>	000-4131-00	Canadian Sales - In			

DB3147\_two18 BUDGET 4 Budget 2027 2027 01/01/2027 12/31/2027 ERP Not Locked False True

DB3147\_two18 BUDGET3 Budget 2024 2024 01/01/2024 12/31/2024 ERP Not Locked False True

DB3147\_two18 test 2019 test 2019 2018 02/01/2018 02/01/2018 DynamicB Not Locked False False

Tools System Management Allocations Payroll Users Management

Rows: 9 A- A+

SortOrder	UserRoleAccess	IsBudgeted	InSummary	InLookups	InReports
=		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



Checkmark **IsBudgeted**.

DynamicBudgets - PHUBERI\P. Hubert - 184.1/2.195.139,25000 - DB3147\_dynamicbudgets

File Budgets Variances Reports

Create Budget Accounts Manage Budgets

System Management > Budgets > Manage Budgets

CompanyDB: DB3147\_two18 Show Budgets

Link to existing data sets in the ERP

Available Actuals and Budgets

Add Selected Budget

Add All Budgets

Add Selected Budget for All Companies

Create new data sets in DynamicBudgets

Enter Name for New Budget

Create for: Selected Company All Companies

Budget Year: 2018 # of Years: 3

Create for: Selected Company All Companies

e.g. Historical Avg for FY2019 and 3 closed years: (2015 - 2017)

Save Budgets Delete Budget Show Company Tags

Print Export to Excel Print to PDF AutoSize Columns

Rows: 9 A- A+

CompanyDB	BudgetID (15)	Description (30)	Year	FromDate	ToDate	Source	Locked	Actual	Imported	SortOrder	UserRoleAccess	IsBudgeted	InSummary	InLookups	InReports
DB3147_two18	2020 Test	2020 Test	2018	03/01/2018	03/01/2018	DynamicB	Not Locked	False	False	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	2023 Actual	2023 Actual	2023	01/01/2023	12/31/2023	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	2024 Actual	2024 Actual	2024	01/01/2024	12/31/2024	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 2005	Budget 2025	2025	01/01/2025	12/31/2025	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 2006	Budget 2026	2026	01/01/2026	12/31/2026	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 2008	Budget 2028	2028	01/01/2028	12/31/2028	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 4	Budget 2027	2027	01/01/2027	12/31/2027	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET3	Budget 2024	2024	01/01/2024	12/31/2024	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	test 2019	test 2019	2018	02/01/2018	02/01/2018	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



Now the 2020 Test budget is NOT locked and is checkmarked IsBudgeted.

DynamicBudgets - PHUBERI\P. Hubert - 184.1/2.195.139,25000 - DB3147\_dynamicbudgets

File Budgets Variances Reports

Create Budget Accounts Manage Budgets

System Management > Budgets > Manage Budgets

CompanyDB: DB3147\_two18 Show Budgets

Link to existing data sets in the ERP

Available Actuals and Budgets

Add Selected Budget

Add All Budgets

Add Selected Budget for All Companies

Create new data sets in DynamicBudgets

Enter Name for New Budget

Create for: Selected Company All Companies

Budget Year: 2018 # of Years: 3 Create for: Selected Company All Companies

e.g. Historical Avg for FY2019 and 3 closed years: (2015 - 2017)

Save Budgets Delete Budget Show Company Tags

Print Export to Excel Print to PDF AutoSize Columns

Rows: 9 A- A+

CompanyDB	BudgetID (15)	Description (30)	Year	FromDate	ToDate	Source	Locked	Actual	Imported	SortOrder	UserRoleAccess	IsBudgeted	InSummary	InLookups	InReports
DB3147_two18	2020 Test	2020 Test	2018	03/01/2018	03/01/2018	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	2023 Actual	2023 Actual	2023	01/01/2023	12/31/2023	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	2024 Actual	2024 Actual	2024	01/01/2024	12/31/2024	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 2005	Budget 2025	2025	01/01/2025	12/31/2025	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 2006	Budget 2026	2026	01/01/2026	12/31/2026	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 2008	Budget 2028	2028	01/01/2028	12/31/2028	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 4	Budget 2027	2027	01/01/2027	12/31/2027	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET3	Budget 2024	2024	01/01/2024	12/31/2024	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	test 2019	test 2019	2018	02/01/2018	02/01/2018	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



Click on **Save Budgets**.

DynamicBudgets - PHUBERI\P. Hubert - 184.1/2.195.139,25000 - DB314/\_dynamicbudgets

File Budgets Variances Reports

Create Budget Accounts Manage Budgets

System Management > Budgets > Manage Budgets

CompanyDB: DB3147\_two18 Show Budgets

Link to existing data sets in the ERP

Available Actuals and Budgets

Add Selected Budget

Add All Budgets

Add Selected Budget for All Companies

Create new data sets in DynamicBudgets

Enter Name for New Budget

Create for: Selected Company All Companies

Budget Year: 2018 # of Years: 3

Create for: Selected Company All Companies

e.g. Historical Avg for FY2019 and 3 closed years: (2015 - 2017)

Save Budgets Delete Budget Show Company Tags

Print Export to Excel Print to PDF AutoSize Columns

CompanyDB	BudgetID (15)	Description (30)	Year	FromDate	ToDate	Source	Locked	Actual	Imported	SortOrder	UserRoleAccess	IsBudgeted	InSummary	InLookups	InReports
DB3147_two18	2020 Test	2020 Test	2018	03/01/2018	03/01/2018	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	2023 Actual	2023 Actual	2023	01/01/2023	12/31/2023	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	2024 Actual	2024 Actual	2024	01/01/2024	12/31/2024	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 2005	Budget 2025	2025	01/01/2025	12/31/2025	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 2006	Budget 2026	2026	01/01/2026	12/31/2026	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 2008	Budget 2028	2028	01/01/2028	12/31/2028	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 4	Budget 2027	2027	01/01/2027	12/31/2027	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET3	Budget 2024	2024	01/01/2024	12/31/2024	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	test 2019	test 2019	2018	02/01/2018	02/01/2018	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Rows: 9 A- A+

A message will appear that reads, **Saved Budgets successfully.**

DynamicBudgets - PHUBERI\P. Hubert - 184.1/2.195.139,25000 - DB3147\_dynamicbudgets

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Create Budget Accounts Manage Budgets

System Management > Budgets > Manage Budgets

CompanyDB: DB3147\_two18 Show Budgets

Link to existing data sets in the ERP

Available Actuals and Budgets

Add Selected Budget

Add All Budgets

Add Selected Budget for All Companies

Create new data sets in DynamicBudgets

Enter Name for New Budget

Create for: Selected Company All Companies

Budget Year: 2018 # of Years: 3

Create for: Selected Company All Companies

e.g. Historical Avg for FY2019 and 3 closed years: (2015 - 2017)

Saved Budgets successfully

Show Company Tags

PDF AutoSize Columns Rows: 9 A- A+

CompanyDB	BudgetID (15)	Description (30)	Year	FromDate	ToDate	Source	Locked	Actual	Imported	SortOrder	UserRoleAccess	IsBudgeted	InSummary	InLookups	InReports
DB3147_two18	2020 Test	2020 Test	2018	03/01/2018	03/01/2018	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	2023 Actual	2023 Actual	2023	01/01/2023	12/31/2023	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	2024 Actual	2024 Actual	2024	01/01/2024	12/31/2024	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 2005	Budget 2025	2025	01/01/2025	12/31/2025	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 2006	Budget 2026	2026	01/01/2026	12/31/2026	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 2008	Budget 2028	2028	01/01/2028	12/31/2028	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET 4	Budget 2027	2027	01/01/2027	12/31/2027	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	BUDGET3	Budget 2024	2024	01/01/2024	12/31/2024	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_two18	test 2019	test 2019	2018	02/01/2018	02/01/2018	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



Click on the **Create Budget Accounts** tab.

DynamicBudgets - PHUBERI\P. Hubert - 184.1/2.195.139,25000 - DB314/\_dynamicbudgets

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Create Budget Accounts Manage Budgets

System Management > Budgets > Manage Budgets

NR1147 From 1R

Create new data sets in DynamicBudgets

Save Budgets Delete Budget Show Company Tag

Print Export to Excel Print to F...F AutoSize Columns

companyDB	BudgetID (15)	Description (30)	Year	FromDate	To Date	Source





Click on the **CompanyDB** dropdown list. Make a selection. For this example, we will select **DB3147\_two18**.

DynamicBudgets - PHUBERT\Hubert - 184.172.195.139:25000 - DB3147\_dynamicbudgets

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Create Budget Accounts X Manage Budgets

System Management > Accounts > Create Budget Accounts

CompanyDB: DB3147\_two18  
 BudgetID: <all>  
 DB3147\_two18

Proceed ☐ Preselect all accounts [Manage Budgets](#)

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'.

**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 recently 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 synchronized 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 [support@dynamicbudgets.com](mailto:support@dynamicbudgets.com)



Click on the **BudgetID** dropdown list. Now you see the 2020 Test budget listed. Now you can proceed with the Create Budget Accounts process.

DynamicBudgets - PHUBERT\PH. Hubert - 184.172.195.139;25000 - DB314/\_dynamicbudgets

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Create Budget Accounts X Manage Budgets

System Management > Accounts > Create Budget Accounts

CompanyDB: DB3147\_two18

BudgetID: test 2019  
2020 Test  
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 recently 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 synchronized 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 [support@dynamicbudgets.com](mailto:support@dynamicbudgets.com)





That's It. You're Done.



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