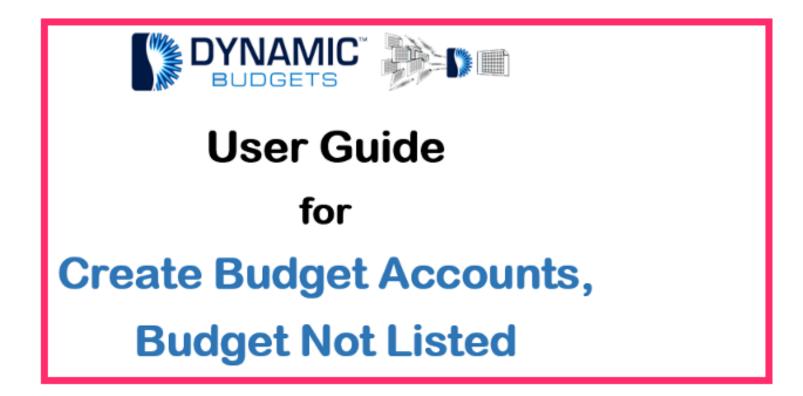


UG-Create Budget Accounts, Budget Not Listed

zgidwani

Dynamic Budgets 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

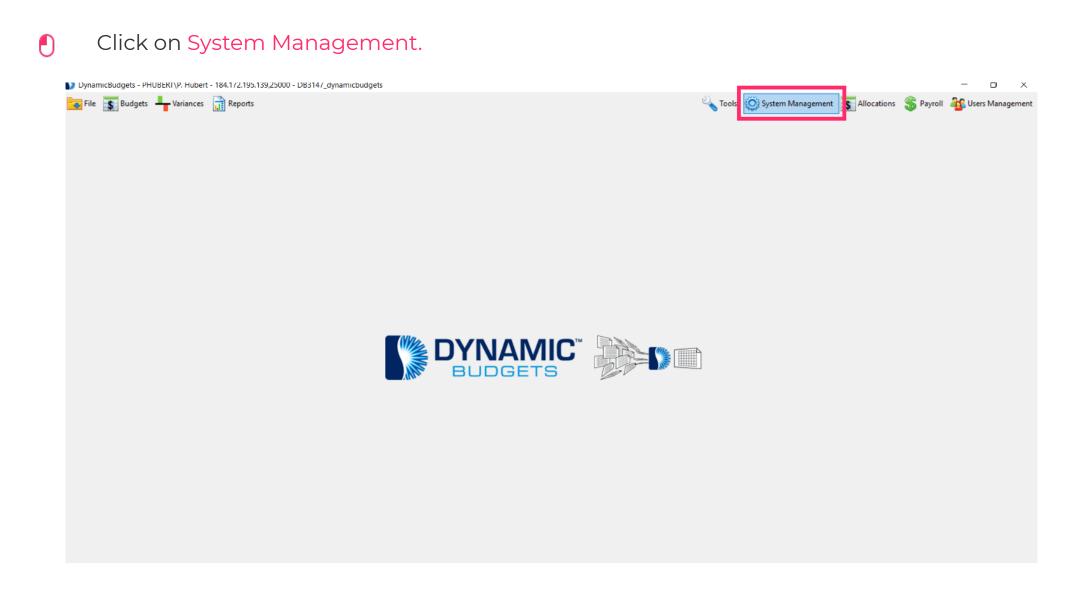
- 1. Synchronize Chart of Accounts
- 2. Manage Objects verify all desired accounts are marked "IsBudgeted"
- 3. Manage OrgUnits verify all desired accounts are marked "IsBudgeted"



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









Click on Accounts.

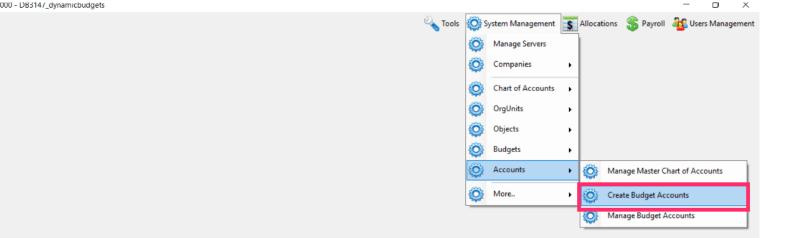




🔁 File 🛐 Budgets 👆 Variances 📑 Reports



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







Click on the CompanyDB dropdown list. Make a selection. In this example, we will select DB3147_twol8.

DynamicBudgets - PHUBERI\P. Hubert - 184.1/2.195.139,25000 - DB314/_dynamicbi	udgets					-	
📷 File 📑 Budgets 🕂 Variances 📑 Reports		🔌 Tools	s 🔅 System Management	\$ Allocations	Payroll	🍇 Users	s Management
System Management > Accounts > Create Budget Accounts							0 ▼ ×
CompanyD8* DB3147_two18 BudgetID DB3147.two18 DB3147.two18 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 <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 ac	ccounts?						
6) if none of the above contact <u>support@dynamicbudgets.com</u>							



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_dynamicbudg	gets					_		×
🦰 File 🚡 Budgets 🕂 Variances 📄 Reports		🔌 Tools	🔅 System Management	\$ Allocations	🏐 Payroll	む Users	Managem	ent
System Management > Accounts > Create Budget Accounts							0 💌	×
BudgetID 1	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	e 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 Syn	nchronize Chart of Accounts							
5) If you are using account level security - have you granted access to the acco	punts?							
6) if none of the above contact <u>support@dynamicbudgets.com</u>								



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

File Budgets Variances Reports System Management > Accounts > Create Budget Accounts CompanyOB* DB3147_two18 DB3147_two18 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 Hanage Budgets 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)	m Management 🚡 Allocations 💲 Payroll 韸 Users Management 🕜 💌 🗙
CompanyOB* DB3147_two18 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 D Preselect all accounts Manage Budgets Budget Accounts Checklist Manage Budgets 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 Fan 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	0 ¥ X
BudgetID Image: and ensure that the Budget is checked as 'IsBudgeted', and is not checked as 'IsBudgeted', and is not checked as 'Locked'. Budget Accounts Checklist Manage Budgets 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 Hanage Budgets	
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	
 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 accounts? 6) if none of the above contact support@dynamicbudgets.com 	



Now Click System Management

DynamicBudgets - PHUBERI\P. Hubert - 184.172.195.139,25000 - DB3147_dynamict	budgets		- 🗆 X
🥫 File 🛐 Budgets 🕂 Variances 📄 Reports		🔌 Tools 🔯 System Management 🛐 Allocations	🍣 Payroll 🍇 Users Management
System Management > Accounts > Create Budget Accounts			2 💌 🗙
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	I 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	accounts?		
6) if none of the above contact <u>support@dynamicbudgets.com</u>			



Click on Budgets.

DynamicBudgets - PHUBERI\P. Hubert - 184.1/2.195.139,25000 - DB314/_dynamicbudgets			- 🗆 ×
🔁 File 🚡 Budgets 👆 Variances 📊 Reports	🔅 System Management	S Allocat	ions 🛭 💲 Payroll 🖓 Users Management
System Management > Accounts > Create Budget Accounts	Manage Servers		0 💌 🗙
CompanyD8* DB3147_two18 V 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	Companies	•	
BudgetID test 2019 V locked'.	Chart of Accounts	•	
Proceed Preselect all accounts	OrgUnits	•	
Budget Accounts Checklist	Objects	•	
If your any accounts are missing check the following Manage Budgets	😳 Budgets	- F	
1) Account is/was marked as inactive	A second		
1a) in next screen choose Include Inactive Accounts in search option Define Budgets Forms (Basic Budget Entry)	Accounts	•	
	O More	•	
2) Orgunit is checkmarked IsBudgeted Manage OrgUnits			
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>



Click on Manage Budgets.

DynamicBudgets - PHUBERI\P. Hubert - 184.1/2.195.139,25000 - DB314/_dynamicbudgets						-		×
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System Management > Accounts > Create Budget Accounts	٢	Manage Servers					0 -	×
CompanyOB* DB3147_two18 V 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	Ô	Companies	•					
BudgetID test 2019 Locked'. Proceed Preselect all accounts Manage Budgets	Ô	Chart of Accounts	•					
	Ô	OrgUnits	•					
Budget Accounts Checklist	Ô	Objects	•					
If your any accounts are missing check the following Manage Budgets	Ö	Budgets	•					
1) Account is/was marked as inactive	â	Accounts		1				
1a) in next screen choose Include Inactive Accounts in search option Define Budgets Forms (Basic Budget Entry)	2005	Accounts						
1b) in sync COA try updating account attributes if you recentl; y updated the active status of the accounts(s) Define Budgets Forms (Custom Budget Entry)	Ô	More	•					
2) Orgunit is checkmarked IsBudgeted Manage OrgUnits				-				
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>



Click on Show Budgets.

DynamicBudgets - PHUBERI\P. Hubert - 184.1/2.195.139,25000 - DB314/_dynamicbudgets		- D X
📷 File 🛐 Budgets 🕂 Variances 📊 Reports	💫 Tools	🔅 System Management 🛐 Allocations 💲 Payroll 舚 Users Management
Create Budget Accounts Manage Budgets ×		-
System Management > Budgets > Manage Budgets		2 💌 💌
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: Budget Year # of Years Create for: Historical Average 2018	
🔄 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.

🔰 D	ynamicBudgets - PH	IUBERI\P. Hubert - 1	184.172.195.139,2500	0 - DB314	/_dynamicbudge	ts									-	- 🗆 X
		Variances									🔌 Too	ls 🔅 System N	lanagement	\$ Allocations	🏐 Payroll	Users Management
C	reate Budget Accou	nts Manag	ge Budgets 🛛 🗙													•
	System Managemer	nt > Budgets > Ma	anage Budgets													0 ▼ ×
c	CompanyDB DB314	ŧ7_two18 ∨	Show Budgets]												
	Link to existing data	sets in the ERP				Create new data	a sets in Dyna	micBudgets								
	Available Actuals a	and Budgets				Enter Name f	for New Budge	t	Create for:							
			✓ Add :	Selected Bu	udget				Selected Compa	any All Comp	anies					
			Ad	id All Budge	ets		Budget	Year # of Year	s Create for:							
			Add Selected Budge	t for All Co	ompanies	Historical Ave	erage 2018	✓ 3 <	Selected Compa	any All Comp	anies					
						🐋 e.a.	Historical Avg	for FY2019 and 3 do	sed years: (2015 - 201	7)						
	Save Budgets	🗙 Delete Budget	Show Compan	v Taos 📫	`											
-			PDF TAutoSize C											_		Rows: 9 A- A+
	ipanyDB	BudgetID (15)	Description (30)	Year	FromDate	ToDate	Source	Locked	Actual	Imported	SortOrder	UserRoleAccess	IsBudgeted	InSummary	InLookups	InReports
	A										-					
•	DB3147_two18	2020 Test	2020 Test	2018	03/01/2018	03/01/2018	DynamicB	Locked	False	False	0	Application Use				
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	DB3147_two18	2024 Actual	2024 Actual	2024	01/01/2024	12/31/2024	ERP	Not Locked	True	True	0	Application Use				
	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				
	DB3147_two18	BUDGET 2008	Budget 2028	2028	01/01/2028	12/31/2028	ERP	Not Locked	False	True	0	Application Use				
	DB3147_two18	BUDGET 4	Budget 2027	2027	01/01/2027	12/31/2027	ERP	Not Locked	False	True	0	Application Use				
	DB3147_two18	BUDGET3	Budget 2024	2024	01/01/2024	12/31/2024	ERP	Not Locked	False	True	0	Application Use				
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Click on Locked.

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		Variances									🔌 Too	ls 🛛 🔅 System M	anagement	\$ Allocations	💲 Payroll	む Users M	anagement
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с	CompanyDB DB31	47_two18 ~	Show Budgets														
	Link to existing data	sets in the ERP				Create new data	a sets in Dyna	micBudgets									
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			∼ Add	Selected Bu	udget				Selected Comp	All Cor	npanies						
			Ac	dd All Budge	ets		Budget	tYear #ofYea	rs Create for:								
			Add Selected Budge	et for All Co	mpanies	Historical Ave	rage 2018	× 3	 Selected Comp 	All Cor	mpanies						
						2 e.g.	Historical Ava	for FY2019 and 3 d	osed years: (2015 - 20	17)							
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	-	••	o PDF 📰 AutoSize (Dawa (A- A+
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Com	panyDB	BudgetID (15)	Description (30)	Year	FromDate =	ToDate =	Source	Locked	Actual	Imported	=	UserRoleAccess		InSummary			InReports
_		2020 Test	2020 Test					ç		False							
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	DB3147_two18	2023 Actual	2023 Actual	2023	01/01/2023	12/31/2023	ERP	Not Locked	True	True	0	Application Use					
	DB3147_two18	2024 Actual	2024 Actual	2024	01/01/2024	12/31/2024	ERP	Not Locked	True	True	0	Application Use					
	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					
	DB3147_two18	BUDGET 4	Budget 2027	2027	01/01/2027	12/31/2027	ERP	Not Locked	False	True	0	Application Use					
	DB3147_two18	BUDGET3	Budget 2024	2024	01/01/2024	12/31/2024	ERP	Not Locked	False	True	0	Application Use				\checkmark	
	DB3147_two18	test 2019	test 2019	2018	02/01/2018	02/01/2018	DynamicB	Not Locked	False	False	0	Application Use	\checkmark			\checkmark	\checkmark



Click on Unlock Budget and Accounts.

Set 🚺	Locked Sta	atus - Budget Accou	nts						- (□ ×		Kan Too	ols 🔅 System N	lanagement	\$ Allocations	🏐 Payroll 🤞	🚰 Users N	Manager
Buc	20 Test dget is LOCK	ED	Unlock Budget On Unlock Budget and Act					cked status for any o d status on all budget										0 -
			int to PDF 📑 AutoSiz	e Columr	ns				Rows: 32	22 A- A+	All Co	mpanies						
LOCKED)	AccountNum	Account-Description	EDITS	TATUS	ApprovalStatus	UpdatedOn			^								
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•	\square	000-4100-00	Sales															
	\checkmark	000-4110-01	US Sales - Retail/Pa	1														
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		000-4112-01	AustralAsian Sales	-								SortOrder		IsBudgeted	InSummary	🗌 InLook		InRep
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Click on the red X to close this window.

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OCKED		AccountNum	Account-Descriptio	EDIT	STATUS	ApprovalStatus	Updated On			^						
2			A	A		A	A				All Companies					
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		000-4111-01	Canadian Sales - R													
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	7_two18	BUDGET 4		2027	01/01/2027	12/31/2027	ERP	Not Locked	False	True	0	Application Use				
	7_two18	BUDGET3		2024	01/01/2024	12/31/2024	ERP	Not Locked	False	True	0	Application Use				
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Checkmark IsBudgeted.

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	Link to existing data	sets in the ERP				Create new dat	ta sets in Dyna	micBudgets								
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			~ Add	Selected Bu	udget				Selected Comp	any All (Companies					
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			Add Selected Budge	et for All Co	mpanies	Historical Av	erage 2018	× 3 ×	 Selected Comp 	any All (Companies					
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	Save Budgets	🗙 Delete Budget	Show Compan	y Tags 📫	>											
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	panyDB	BudgetID (15)	Description (30)	Year	FromDate	ToDate	Source	Locked	Actual	Imported		UserRoleAccess	IsBudgeted	InSummary	InLook	
	i	A		=	=	=					=					
2	DB3147_two18	2020 Test	2020 Test	2018	03/01/2018	03/01/2018	DynamicB		False	False	0	Application Use				
	DB3147_two18	2023 Actual	2023 Actual	2023	01/01/2023	12/31/2023	ERP	Not Locked	True	True	0	Application Use	ļ			
	DB3147_two18	2024 Actual	2024 Actual	2024	01/01/2024	12/31/2024	ERP	Not Locked	True	True	0	Application Use				
	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				
	DB3147_two18	BUDGET 2008	Budget 2028	2028	01/01/2028	12/31/2028	ERP	Not Locked	False	True	0	Application Use				
	DB3147_two18	BUDGET 4	Budget 2027	2027	01/01/2027	12/31/2027	ERP	Not Locked	False	True	0	Application Use				
	DB3147_two18	BUDGET3	Budget 2024	2024	01/01/2024	12/31/2024	ERP	Not Locked	False	True	0	Application Use				
	DB3147_two18	test 2019	test 2019	2018	02/01/2018	02/01/2018	DynamicB	Not Locked	False	False	0	Application Use				



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

Create Bu System Company Link to e	udget Accoun	t > Budgets > Ma 7_two18 ~ ets in the ERP	Budgets × anage Budgets Show Budgets Add 5	Selected Bu	-	Create new data s Enter Name for		-			Voo Too	s 🔅 System M	anagement	S Allocations	S Payroll						
Create Bu System Company Link to e	wdget Accoun m Management yDB DB3142 existing data se	ts Manag t > Budgets > Ma 7_two 18 ~ ets in the ERP	pe Budgets × anage Budgets Show Budgets ✓ Add 5 Add 5	id All Budge	-			-							·	-					
Company Link to e	yDB DB3147 existing data se	7_two18 ~	Show Budgets	id All Budge	-			-									0 ▼ ×				
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	-		Ad	id All Budge	-			-													
Avail	ilable Actuals ar	nd Budgets	Ad	id All Budge	-	Enter Name for	r New Budget					Create new data sets in DynamicBudgets									
			Ad	id All Budge	-			•	Create for:												
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		[Add Selected Budge				Budget	Year # of Yea	rs Create for:												
			Hou beletted budge	t for All Cou	moanies	Historical Avera			 Selected Comp 	any All Co	mpanies										
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						у e.g. н	iistorical Avg	for FY2019 and 3 do	osed years: (2015 - 20	1/)											
				>																	
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DB31	147_two18	BUDGET 2008	Budget 2028	2028	01/01/2028	12/31/2028	ERP	Not Locked	False	True	0	Application Use									
		BUDGET 4	Budget 2027	2027	01/01/2027		ERP	Not Locked	False	True	0	Application Use									
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Click on Save Budgets.

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	DB3147_two18	BUDGET 2006	Budget 2026	2026	01/01/2026	12/31/2026	ERP	Not Locked	False	True	0	Application Use				\checkmark	
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	DB3147_two18	BUDGET 4	Budget 2027	2027	01/01/2027	12/31/2027	ERP	Not Locked	False	True	0	Application Use					\checkmark
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A message will appear that reads, Saved Budgets successfully.

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	DB3147_two18	BUDGET 2005	Budget 2025	2025	01/01/2025	12/31/2025	ERP	Not Locked	False	True	0	Application Use					
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	DB3147_two18	BUDGET 2008	Budget 2028	2028	01/01/2028	12/31/2028	ERP	Not Locked	False	True	0	Application Use					
	DB3147_two18	BUDGET 4	Budget 2027	2027	01/01/2027	12/31/2027	ERP	Not Locked	False	True	0	Application Use					
	DB3147_two18	BUDGET3	Budget 2024	2024	01/01/2024	12/31/2024	ERP	Not Locked	False	True	0	Application Use					
	DB3147_two18	test 2019	test 2019	2018	02/01/2018	02/01/2018	DynamicB	Not Locked	False	False	0	Application Use					
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Click on the Create Budget Accounts tab.

DynamicBudgets - PHUBERI \P. Hubert - 184.1/2.195.139,25000 - DB314/_dynamicbudgets	X
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ompanyDB BudgetID (15) Description (30) Year FromDate Tc has a second seco	



Click on he CompanyDB dropdown list. Make a selection. For this example, we will select DB3147_two18.

DynamicBudgets - PHUBERI\P. Hubert - 184.1/2.195.139,25000 - DB3147_dynamicbi	udgets					_	u x				
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System Management > Accounts > Create Budget Accounts							0 🕶 🗙				
CompanyDB* D83147_two18 BudgetID cal> D83147_two18 Proceed	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 <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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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 - PHUBERI\P. Hubert - 184.172.195.139,25000 - DB3147_dynamicbi	udgets					- 0	J X					
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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)											
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5) If you are using account level security - have you granted access to the ac	counts?											
6) if none of the above contact <u>support@dynamicbudgets.com</u>												



UG-Create Budget Accounts, Budget Not Listed

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That's It. You're Done.



That's It. You're Done.