



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

1

**DYNAMIC™**
BUDGETS

User Guide for Create Budget Accounts Budget Not Listed



Create Budget Accounts
Prerequisite Steps

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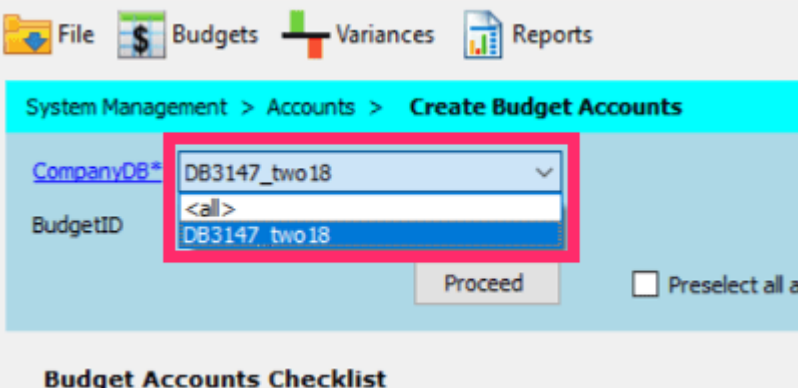

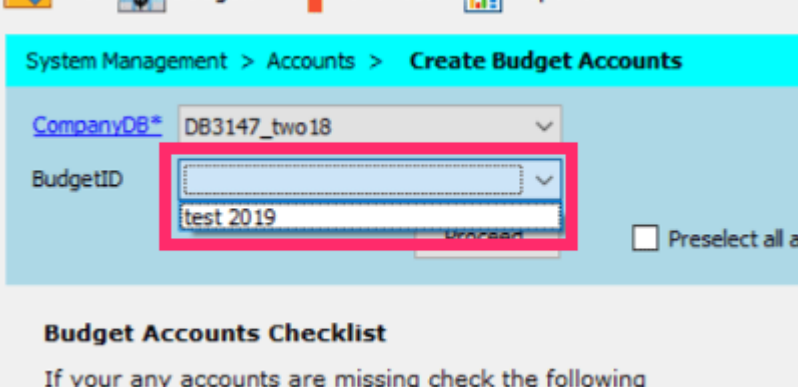

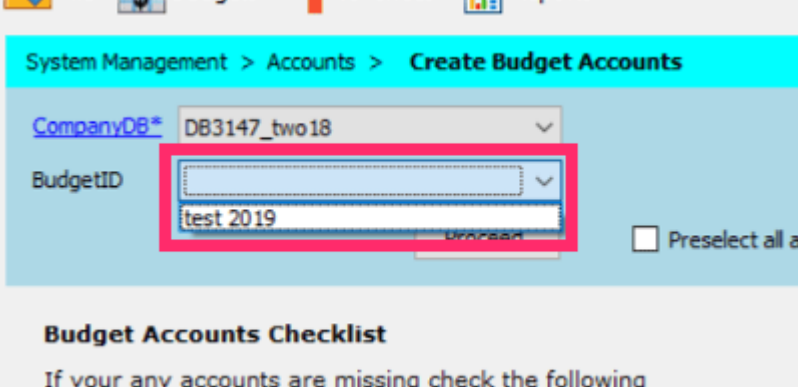

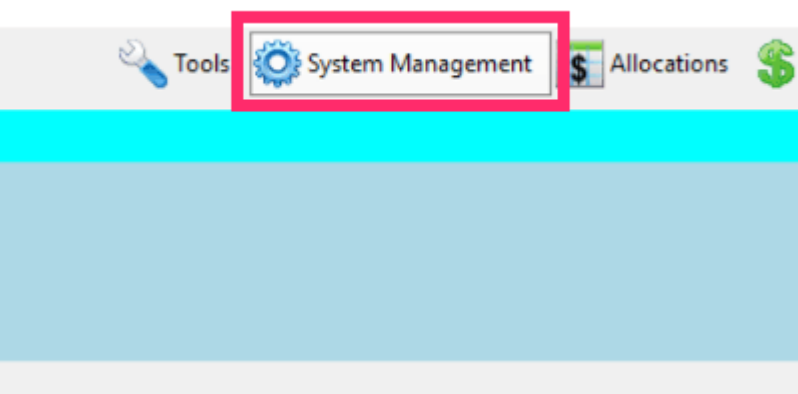
1. Synchronize Chart of Accounts
2. Manage Objects-verify all desired accounts are marked "IsBudgeted"
3. Manage OrgUnits-verify all desired accounts are marked "IsBudgeted"


**DYNAMIC™**
BUDGETS

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"

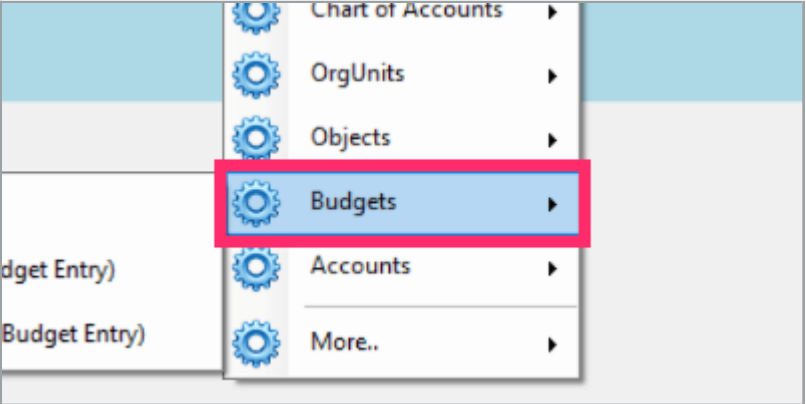
<div data-bbox="119 313 167 358"></div> <div data-bbox="202 304 526 365"><p>Purpose: Create Budget Accounts</p></div> <div data-bbox="202 403 584 497"><p>This procedure is creating budgeting accounts to store budget values.</p></div>	<div data-bbox="654 275 694 320">3</div> <div data-bbox="750 309 1513 795"></div>
<div data-bbox="119 884 167 929"></div> <div data-bbox="202 875 612 909"><p>Click on System Management.</p></div>	<div data-bbox="654 846 694 891">4</div>
<div data-bbox="119 1285 167 1330"></div> <div data-bbox="202 1276 448 1310"><p>Click on Accounts.</p></div>	<div data-bbox="654 1247 694 1292">5</div>
<div data-bbox="119 1686 167 1731"></div> <div data-bbox="202 1677 515 1740"><p>Click on Create Budget Accounts.</p></div>	<div data-bbox="654 1648 694 1693">6</div>


<div>7</div> <div>  <p>Click on the CompanyDB dropdown list. Make a selection.</p> <p>In this example, we will select DB3147_two18.</p> </div>	
<div>8</div> <div>  <p>Click on the BudgetID dropdown list. Make a selection. In this example, we want to select 2020 test, but its missing from the list.</p> <p>Note: There are 2 reasons the budget will not be listed in the dropdown list.</p> </div>	
<div>9</div> <div>  <p>Reason 1: The budget is not checkmarked IsBudgeted.</p> <p>Reason 2: The budget is locked.</p> </div>	
<div>10</div> <div>  <p>Now Click System Management</p> </div>	



Click on **Budgets**.

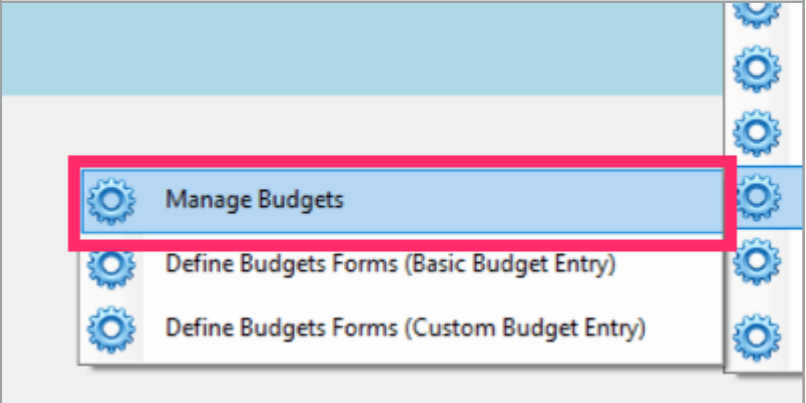
11






Click on **Manage Budgets**.

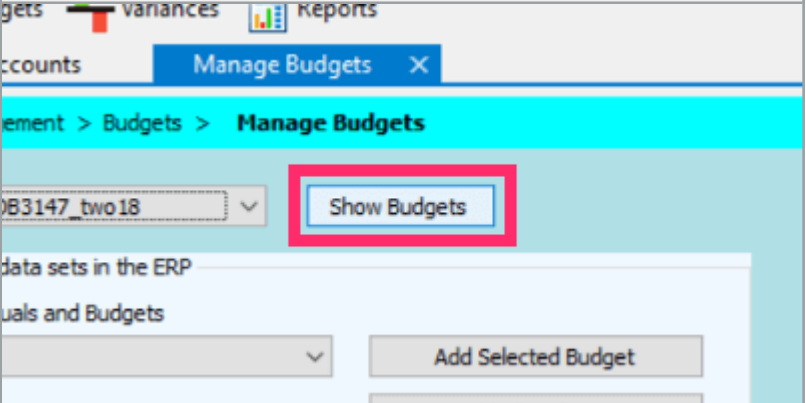
12






Click on **Show Budgets**.

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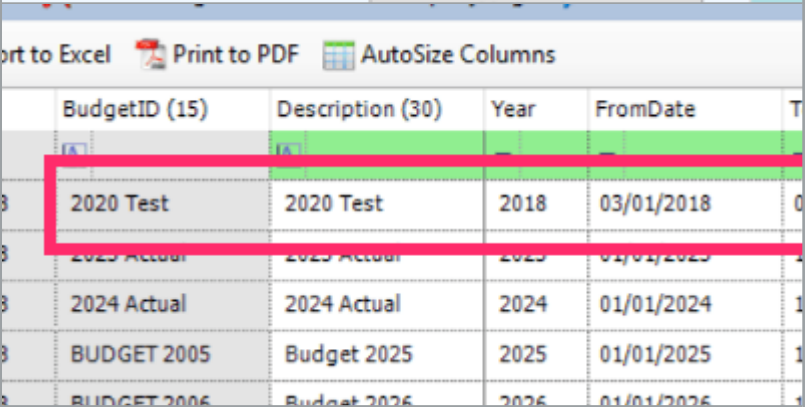




Note: We see the 2020 Test budget listed below.

The budget is locked and NOT check IsBudgeted.

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BudgetID (15)	Description (30)	Year	FromDate	T
2020 Test	2020 Test	2018	03/01/2018	0
2023 Actual	2023 Actual	2023	01/01/2023	1
2024 Actual	2024 Actual	2024	01/01/2024	1
BUDGET 2005	Budget 2025	2025	01/01/2025	1
BUDGET 2006	Budget 2026	2026	01/01/2026	1

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Click on **Locked**.

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Date	Source	Locked	Actual	Import
/01/2018	DynamicB	Locked	False	False
/31/2023	ERP	Not Locked	True	True
/31/2024	ERP	Not Locked	True	True
/31/2025	ERP	Not Locked	False	True
/31/2026	ERP	Not Locked	False	True

Click on **Unlock Budget and Accounts**.

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LOCKED

Unlock Budget Only

Unlock Budget and Accounts

Locks / Unlocks bud

Locks / Unlocks bud

nd Status on Accounts

Export to Excel Print to PDF AutoSize Columns

Click on the red X to close this window.

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Close

Tools Sy


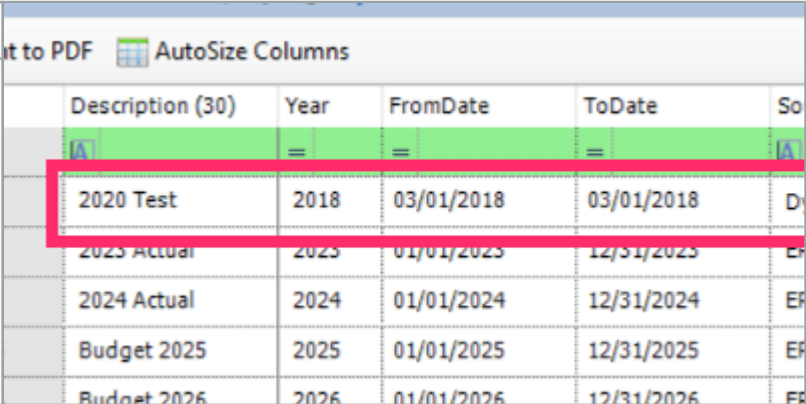

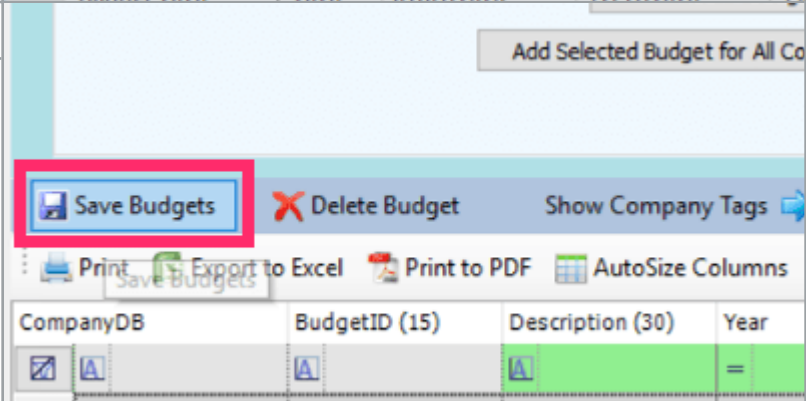

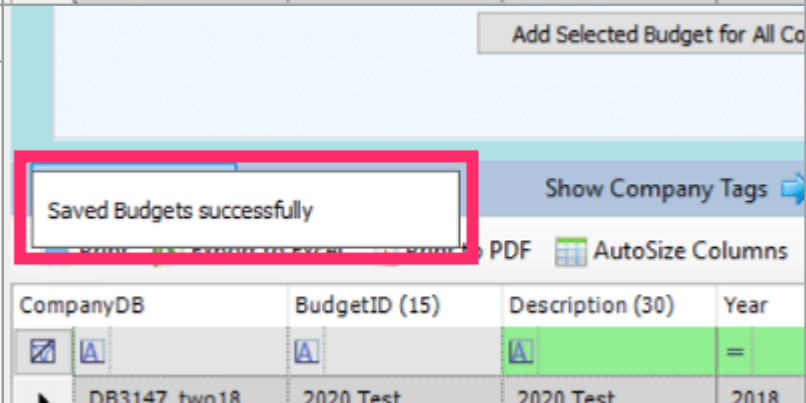

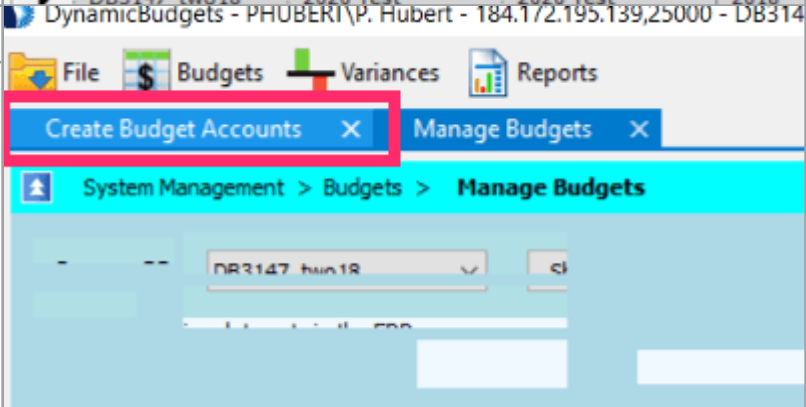
Checkmark **IsBudgeted**.

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PortOrder	UserRoleAccess	IsBudgeted	<input type="checkbox"/> InSummary	<input type="checkbox"/> InLook
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

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	Now the 2020 Test budget is NOT locked and is checkmarked IsBudgeted.	19	 <table><thead><tr><th>Description (30)</th><th>Year</th><th>FromDate</th><th>ToDate</th><th>So</th></tr></thead><tbody><tr><td>2020 Test</td><td>2018</td><td>03/01/2018</td><td>03/01/2018</td><td>D</td></tr><tr><td>2023 Actual</td><td>2023</td><td>01/01/2023</td><td>12/31/2023</td><td>EF</td></tr><tr><td>2024 Actual</td><td>2024</td><td>01/01/2024</td><td>12/31/2024</td><td>EF</td></tr><tr><td>Budget 2025</td><td>2025</td><td>01/01/2025</td><td>12/31/2025</td><td>EF</td></tr><tr><td>Budget 2026</td><td>2026</td><td>01/01/2026</td><td>12/31/2026</td><td>EF</td></tr></tbody></table>	Description (30)	Year	FromDate	ToDate	So	2020 Test	2018	03/01/2018	03/01/2018	D	2023 Actual	2023	01/01/2023	12/31/2023	EF	2024 Actual	2024	01/01/2024	12/31/2024	EF	Budget 2025	2025	01/01/2025	12/31/2025	EF	Budget 2026	2026	01/01/2026	12/31/2026	EF
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	Click on Save Budgets .	20	 <p>Buttons: Save Budgets, Delete Budget, Show Company Tags</p>																														
	A message will appear that reads, Saved Budgets successfully .	21	 <p>Message: Saved Budgets successfully</p>																														
	Click on the Create Budget Accounts tab.	22	 <p>Navigation: System Management > Budgets > Manage Budgets</p>																														

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