






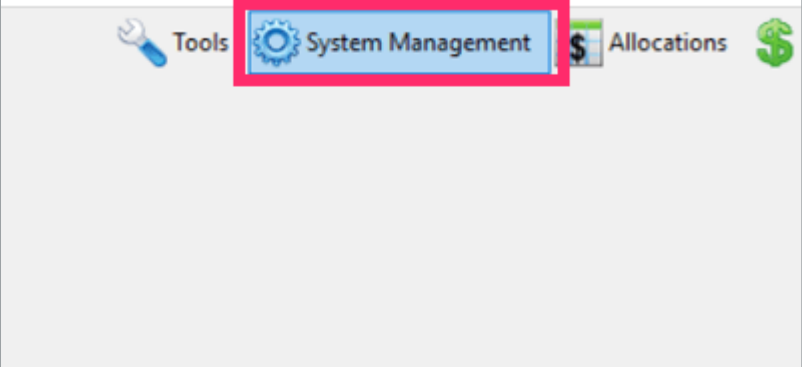

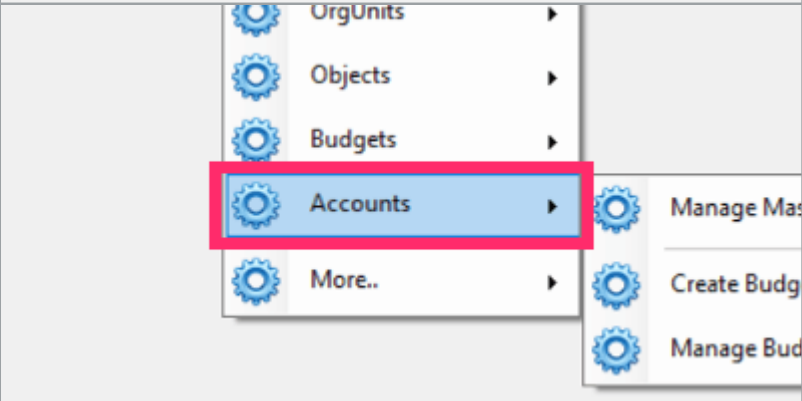

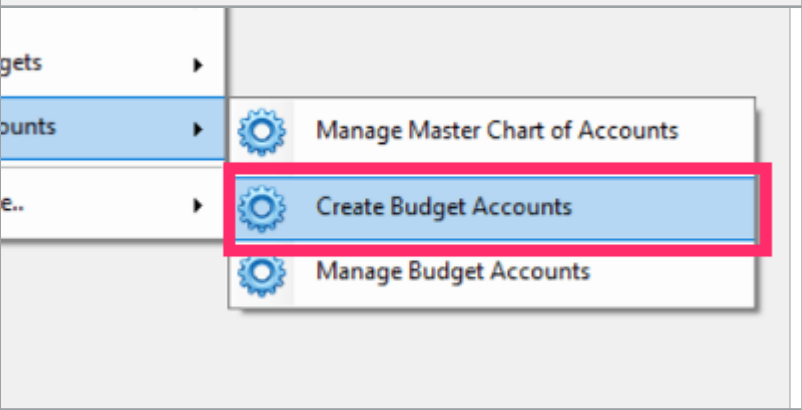


<div> <div></div> <div>Dynamic Budgets User Guide for Create Budget Accounts, Inactive Accounts</div> </div> <div>1</div>	<div> <div>   </div> <div> <div>User Guide</div> <div>for</div> <div>Create Budget Acco</div> <div>Inactive Account</div> </div> </div>
<div> <div></div> <div>Create Budget Accounts Prerequisite Steps</div> <div> <div>1. Synchronize Chart of Accounts</div> <div>2. Manage Objects-verify all desired accounts are marked "IsBudgeted"</div> <div>3. Manage OrgUnits-verify all desired accounts are marked "IsBudgeted"</div> </div> </div> <div>2</div>	<div> <div>   </div> <div> <div>Create Budget Accounts Prere</div> <div> <div>1. Synchronize Chart of Accounts</div> <div>2. Manage Objects – verify all desired accou</div> <div>3. Manage OrgUnits – verify all desired acco</div> </div> </div> </div>

<div></div> <div><p>Purpose: Create Budget Accounts</p><p>This procedure is creating budgeting accounts to store budget values.</p></div>	3	<div><p>Create Budget Accounts</p><p><i>Purpose:</i> This procedure is creating budget values.</p></div>
<div></div> <div><p>Click on System Management.</p></div>	4	<div></div>
<div></div> <div><p>Click on Accounts.</p></div>	5	<div></div>
<div></div> <div><p>Click on Create Budget Accounts.</p></div>	6	<div></div>

Click on the **CompanyDB** dropdown list. Make a selection.

In this example, we will select **DB3147_two18**.

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Click on the **BudgetID** dropdown list. Make a selection. In this example, we will select, **2020 Test**.

Note: If the BudgetID is not on the list, go to manage budgets.

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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**.


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

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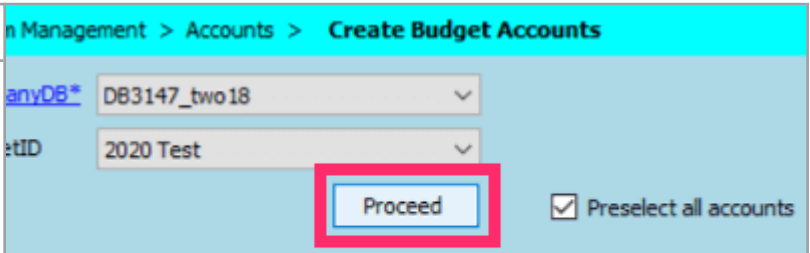
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Click on **Proceed**.

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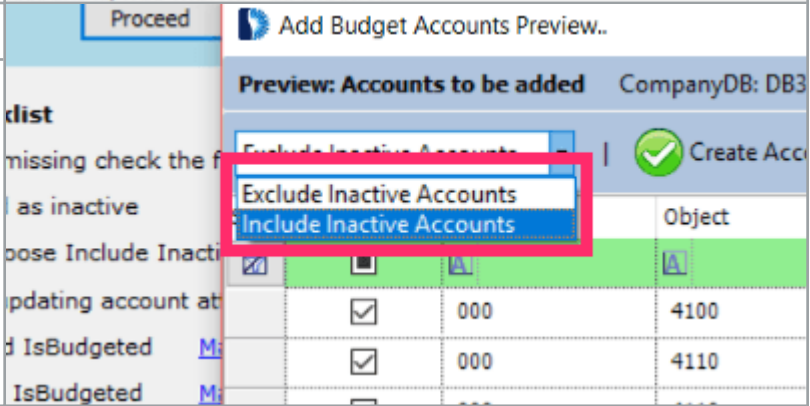





Note: You can choose to include or exclude inactive accounts with this dropdown list.

For this example, we will **include inactive accounts**.

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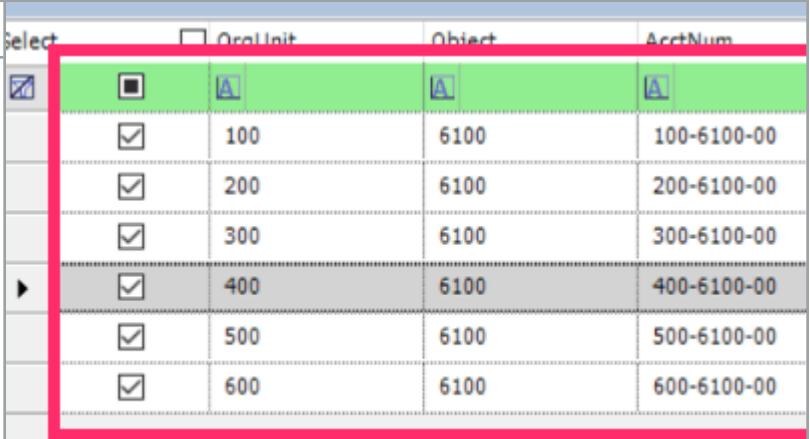





Type "**inactive**" in the green area under the active column.

Now you should see the inactive accounts. **Select the accounts you want to add to the budget.**

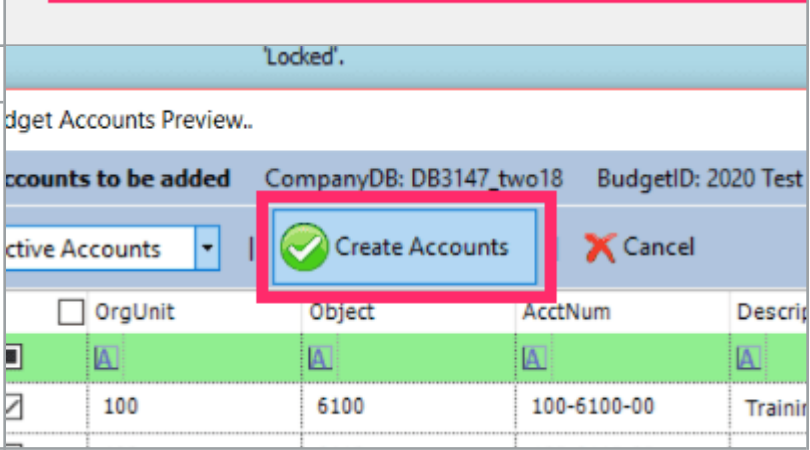
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Click on **Create Accounts**.

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Click on **OK**

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322 accounts added successfully

OK

80-00	Rent Expense - A	Active
90-00	Utilities Expense -	Active
00-00	Postage/Freight -	Active
10-00	Telephone - Admi	Active

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

Click on **OK**.

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185 accounts added successfully

OK

14-02	Germany Sales -	Active
15-01	United Kingdom S	Active
15-02	United Kingdom S	Active
16-01	South Africa - Ret	Active

Click on the **X** to close.

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Management Allocations Payroll Users Management

That's It. You're Done.

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DYNAMIC
BUDGETS

That's It. You're Done.