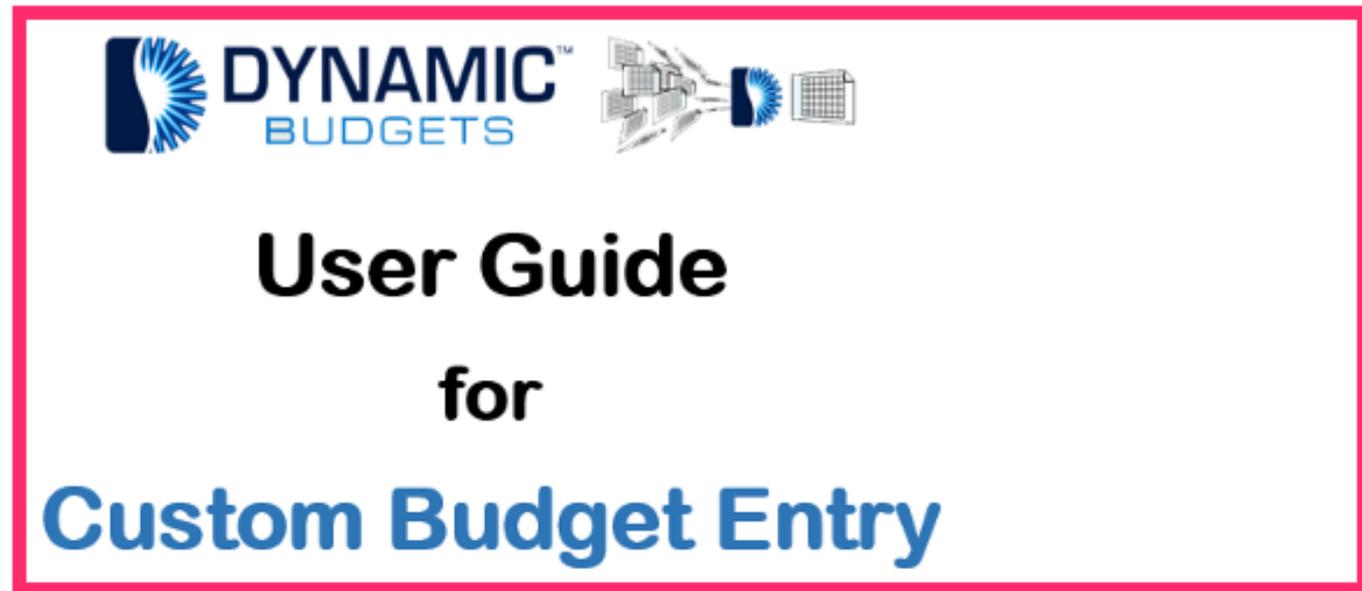
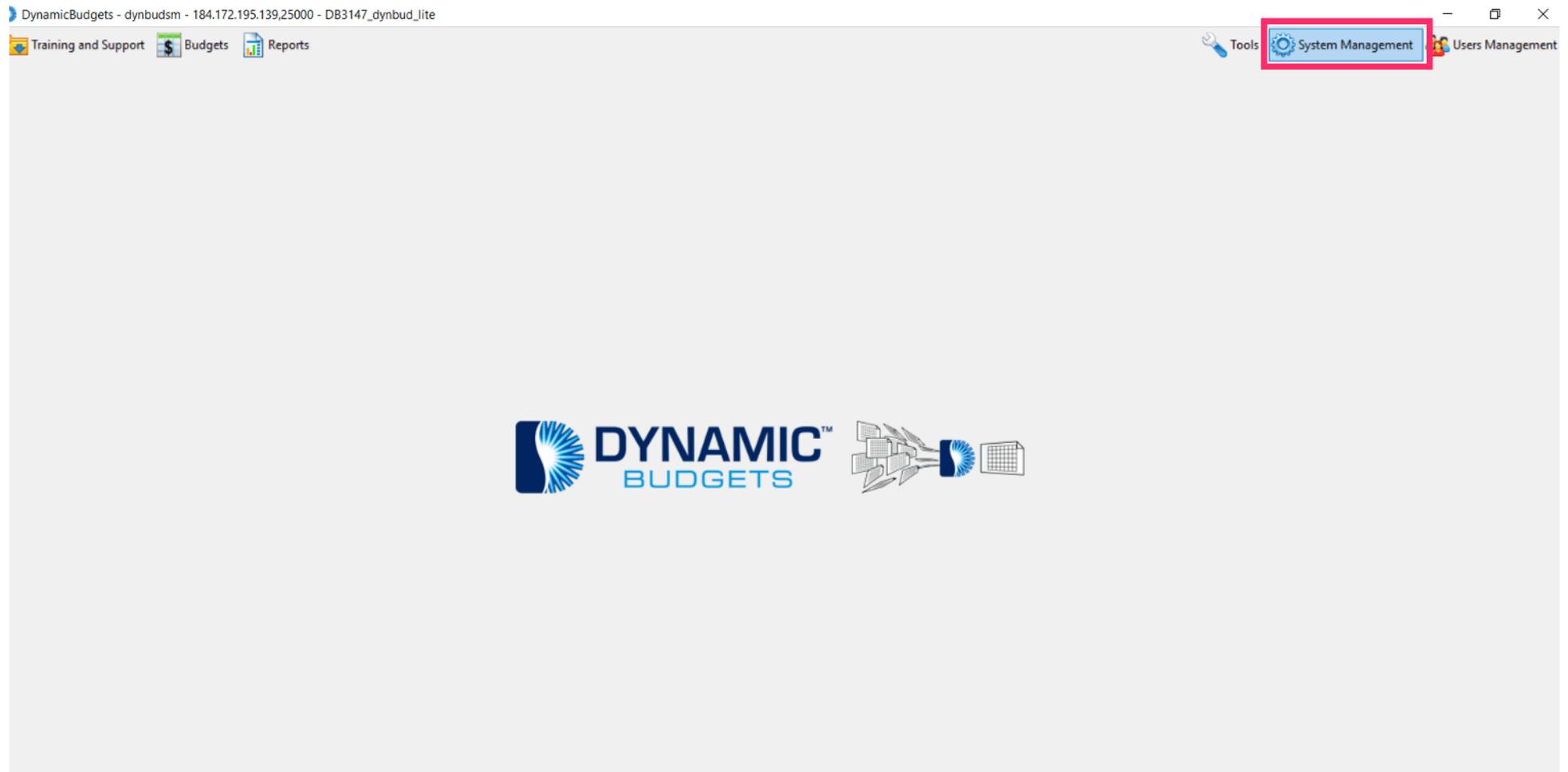


 Dynamic Budgets User Guide for Custom Budget Entry



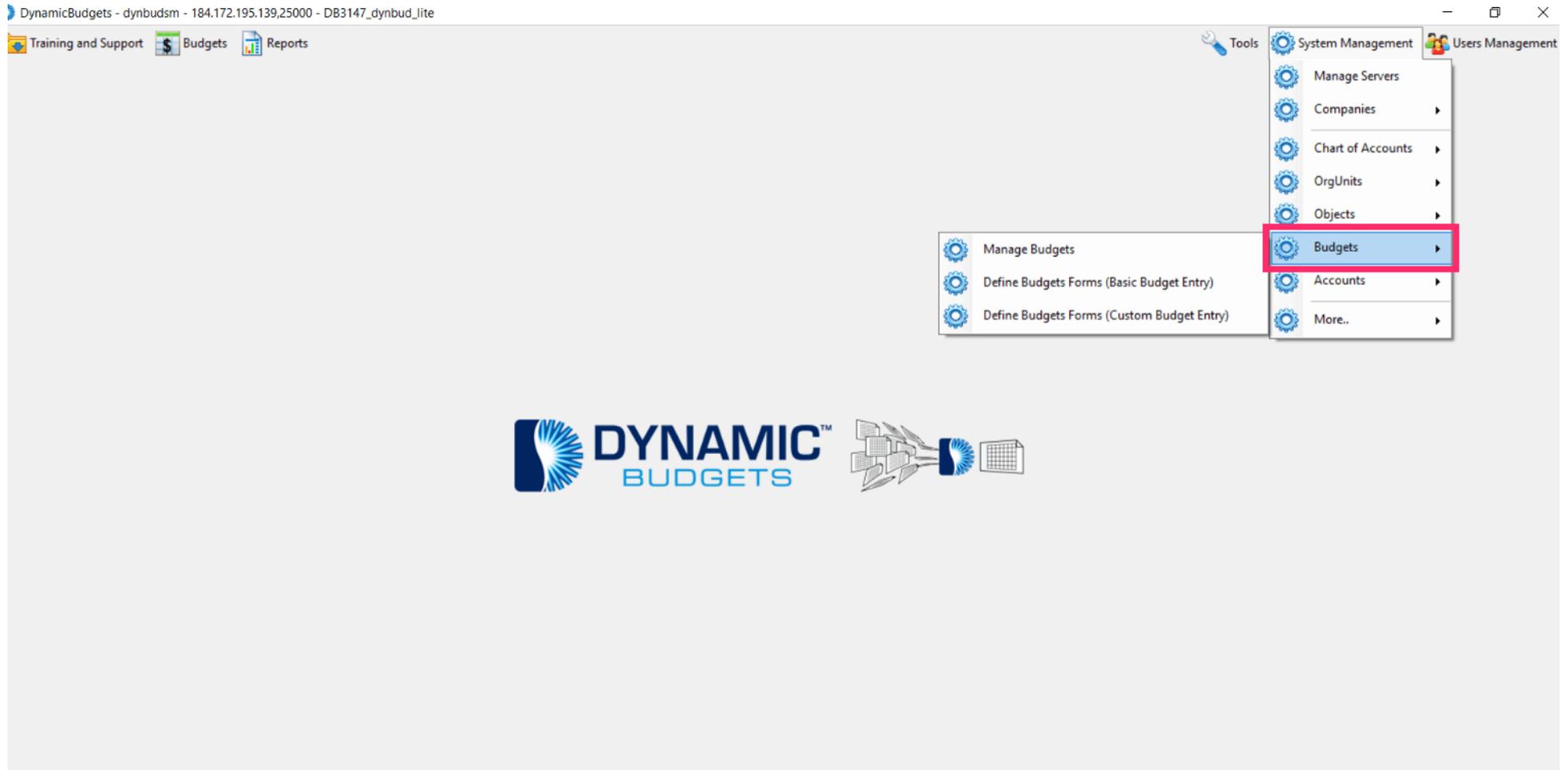


We are going to review how to create a custom budget entry screen. Let's get started. Click on **System Management**.

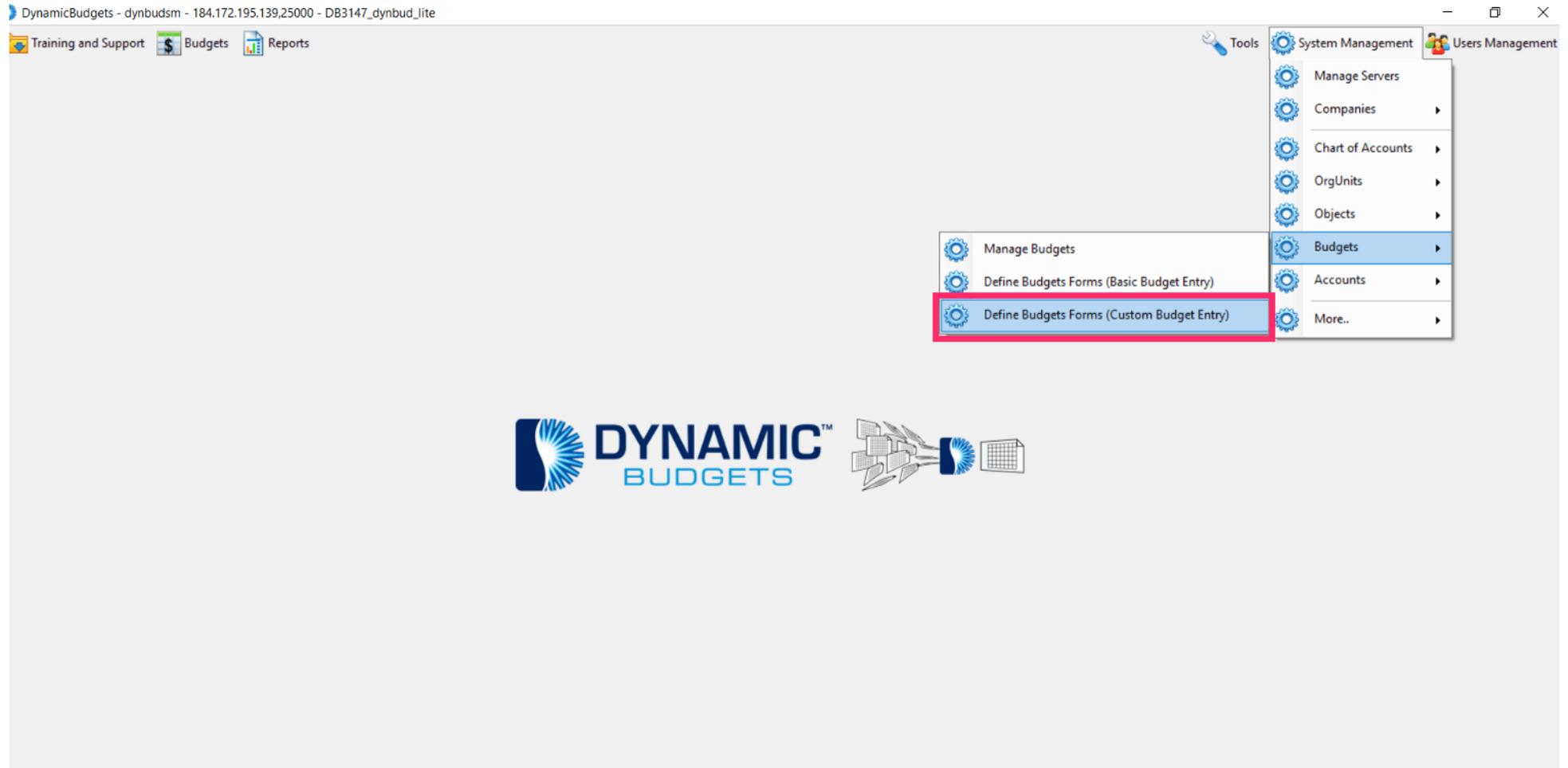




Click on **Budgets**.



Click on Define Budgets Forms (Custom Budget Entry).





Note: *As a reminder, this path shows you how to get to this screen again.* In this example, you would go to the System Management menu, Budgets then Define Budgets Forms (Custom Budget Entry).

The screenshot shows a web browser window with the following elements:

- Browser title: DynamicBudgets - dynbudsm - 184.172.195.139,25000 - DB3147\_dynbud\_lite
- Navigation menu: Training and Support, Budgets, Reports
- System Management menu: Tools, System Management, Users Management
- Breadcrumb: System Management > Budgets > Define Budgets Forms (Custom Budget Entry) (highlighted in red)
- Form fields: CompanyDB\* (DB3147\_two18), Form (<select>)
- Buttons: Save Changes, Add New Column, Delete Form, Add New Form, Clone Form
- Form Name: [Text Field]
- Primary BudgetID for: Add New Form
- User access (visibility): Disabled
- Options:  Allow period as input,  Exclude zero value accounts,  Flip sign for Variances (Better/Worse for CR vs DR Accts)
- Section: Column Layout
- Instruction: To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button
- Table Headers: Column Position, Column Name, Data Entry Type, BudgetID, Fiscal Month, Month / YTD, Report Level, VarCompCol, VarBaseCol, VarCommitments, NumberFormat, Hidden, BackgroundColor, Text Color, FormulaResolved



Click on the CompanyDB dropdown list. Make your selection. In this example, select DB3147\_two18.

DynamicBudgets - dynbudsm - 184.172.195.139,25000 - DB3147\_dynbud\_lite

Training and Support | Budgets | Reports | Tools | System Management | Users Management

System Management > Budgets > Define Budgets Forms (Custom Budget Entry)

CompanyDB\*  
DB3147\_two18

Form  
<select>

Save Changes | Add New Column | Delete Form | Add New Form | Clone Form

Form Name:   
Primary BudgetID for:  Add New Form  
User access (visibility): Disabled

Allow period as input     Exclude zero value accounts  
 Flip sign for Variances (Better/Worse for CR vs DR Accts)

Column Layout

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

Column Position	Column Name	Data Entry Type	BudgetID	Fiscal Month	Month / YTD	Report Level	VarCompCol	VarBaseCol	VarCommitments	NumberFormat	Hidden	<input type="checkbox"/> BackgroundColor	Text Color	FormulaResolved
-----------------	-------------	-----------------	----------	--------------	-------------	--------------	------------	------------	----------------	--------------	--------	--	------------	-----------------



Click on **Add New Form.**

DynamicBudgets - dynbudsm - 184.172.195.139,25000 - DB3147\_dynbud\_lite

Training and Support | Budgets | Reports | Tools | System Management | Users Management

System Management > Budgets > Define Budgets Forms (Custom Budget Entry)

CompanyDB\* DB3147\_two18 | Form <select>

Save Changes | Add New Column | Delete Form | **Add New Form** | Clone Form

Form Name:  | Primary BudgetID for:  | User access (visibility): Disabled

Allow period as input |  Exclude zero value accounts  
 Flip sign for Variances (Better\Worse for CR vs DR Accts)

Column Layout

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

Column Position	Column Name	Data Entry Type	BudgetID	Fiscal Month	Month / YTD	Report Level	VarCompCol	VarBaseCol	VarCommitments	NumberFormat	Hidden	<input type="checkbox"/> BackgroundColor	Text Color	FormulaResolved
-----------------	-------------	-----------------	----------	--------------	-------------	--------------	------------	------------	----------------	--------------	--------	--	------------	-----------------



Enter the Form Name.

The screenshot shows the 'Define Budgets Forms (Custom Budget Entry)' interface. A modal dialog titled 'Create new budget form' is open, displaying the following information:

- CompanyDB: DB3147\_two18
- Form Name\*:

The background application shows a 'Form Name' field and a 'Column Layout' table with the following columns:

Column Position	Column Name	Data Entry Type	BudgetID
To delete a row, click the row header to select the entire row (one or multiple rows)			



A message will appear, **New form created successfully**. The form name entered, **Actual vs. Budget**. Note: If you want to change the name, just type the new name in the white box and click on save changes.

DynamicBudgets - dynbudsm - 184.172.195.139,25000 - DB3147\_dynbud\_lite

Training and Support | Budgets | Reports | Tools | System Management | Users Management

System Management > Budgets > Define Budgets Forms (Custom Budget Entry)

CompanyDB\*: DB3147\_two18 | Form: Actual vs Budget

Save Changes | Add New Column | Delete Form | Add New Form | Clone Form

**Actual vs Budget # 3015**

Primary BudgetID for Accounts List \*: 2018 Actual | User access (visibility): Application User

Allow period as input |  Exclude zero value accounts

Flip sign for Variances (Better/Worse for CR vs DR Accts)

Column Layout

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

Column Position	Column Name	Data Entry Type	BudgetID	Fiscal Month	Month / YTD	Report Level	1st Calc Factor	2nd Calc Factor	3rd Calc Factor	NumberFormat	Hidden	Background Color	Text Color	FormulaResolved	Threshold
1										Value	<input type="checkbox"/>				
2										Value	<input type="checkbox"/>				
3										Value	<input type="checkbox"/>				
4										Value	<input type="checkbox"/>				
5										Value	<input type="checkbox"/>				
6										Value	<input type="checkbox"/>				
7										Value	<input type="checkbox"/>				
8										Value	<input type="checkbox"/>				
9										Value	<input type="checkbox"/>				
10										Value	<input type="checkbox"/>				
11										Value	<input type="checkbox"/>				
12										Value	<input type="checkbox"/>				
13										Value	<input type="checkbox"/>				
14										Value	<input type="checkbox"/>				
15										Value	<input type="checkbox"/>				



Select the **Primary BudgetID for Accounts List** from the dropdown list. In this example, we will select **2018 Actual**.

DynamicBudgets - dynbudsm - 184.172.195.139,25000 - DB3147\_dynbud\_lite

Training and Support | Budgets | Reports

Tools | System Management | Users Management

System Management > Budgets > Define Budgets Forms (Custom Budget Entry)

CompanyDB\*: DB3147\_two18 | Form: Actual vs Budget

Save Changes | Add New Column | Delete Form | Add New Form | Clone Form

**Actual vs Budget # 3015** | Primary BudgetID for Accounts List \* | User access (visibility) |  Allow period as input |  Exclude zero value accounts

Actual vs Budget | 2018 Actual | Application User |  Flip sign for Variances (Better/Worse for CR vs DR Accts)

Column Layout

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

Column Position	Column Name	Data Entry Type	BudgetID	Fiscal Month	Month / YTD	Report Level	1st Calc Factor	2nd Calc Factor	3rd Calc Factor	NumberFormat	Hidden	Background Color	Text Color	FormulaResolved	Threshold
▶ 1										Value	<input type="checkbox"/>				
2										Value	<input type="checkbox"/>				
3										Value	<input type="checkbox"/>				
4										Value	<input type="checkbox"/>				
5										Value	<input type="checkbox"/>				
6										Value	<input type="checkbox"/>				
7										Value	<input type="checkbox"/>				
8										Value	<input type="checkbox"/>				
9										Value	<input type="checkbox"/>				
10										Value	<input type="checkbox"/>				
11										Value	<input type="checkbox"/>				
12										Value	<input type="checkbox"/>				
13										Value	<input type="checkbox"/>				
14										Value	<input type="checkbox"/>				
15										Value	<input type="checkbox"/>				



Select the **User Access (visibility)** from the dropdown list. In this example, we will select **Application User**.

DynamicBudgets - dynbudsm - 184.172.195.139,25000 - DB3147\_dynbud\_lite

Training and Support | Budgets | Reports | Tools | System Management | Users Management

System Management > Budgets > Define Budgets Forms (Custom Budget Entry)

CompanyDB\* DB3147\_two18 | Form Actual vs Budget

Save Changes | Add New Column | Delete Form | Add New Form | Clone Form

Actual vs Budget # 3015 | Primary BudgetID for Accounts List \* 2018 Actual | User access (visibility) Application User

Allow period as input |  Exclude zero value accounts  
 Flip sign for Variances (Better/Worse for CR vs DR Accts)

Column Layout

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

Column Position	Column Name	Data Entry Type	BudgetID	Fiscal Month	Month / YTD	Report Level	1st Calc Factor	2nd Calc Factor	3rd Calc Factor	NumberFormat	Hidden	Background Color	Text Color	FormulaResolved	Threshold
▶ 1										Value	<input type="checkbox"/>				
2										Value	<input type="checkbox"/>				
3										Value	<input type="checkbox"/>				
4										Value	<input type="checkbox"/>				
5										Value	<input type="checkbox"/>				
6										Value	<input type="checkbox"/>				
7										Value	<input type="checkbox"/>				
8										Value	<input type="checkbox"/>				
9										Value	<input type="checkbox"/>				
10										Value	<input type="checkbox"/>				
11										Value	<input type="checkbox"/>				
12										Value	<input type="checkbox"/>				
13										Value	<input type="checkbox"/>				
14										Value	<input type="checkbox"/>				
15										Value	<input type="checkbox"/>				

You have the option to: 1. Allow period as input. We will select this option for this example. 2. Exclude zero value accounts. 3. Flip sign for variances.

DynamicBudgets - dynbudsm - 184.172.195.139,25000 - DB3147\_dynbud\_lite

Training and Support | Budgets | Reports

Tools | System Management | Users Management

System Management > Budgets > Define Budgets Forms (Custom Budget Entry)

CompanyDB\* DB3147\_two18 | Form Actual vs Budget

Save Changes | Add New Column | Delete Form | Add New Form | Clone Form

Actual vs Budget # 3015 | Primary BudgetID for Accounts List \* 2018 Actual | User access (visibility) Application User

Allow period as input |  Exclude zero value accounts  
 Flip sign for Variances (Better/Worse for CR vs DR Accts)

Column Layout

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

Column Position	Column Name	Data Entry Type	BudgetID	Fiscal Month Month / YTD	Report Level	1st Calc Factor	2nd Calc Factor	3rd Calc Factor	NumberFormat	Hidden	Background Color	Text Color	FormulaResolved	Threshold
▶ 1									Value	<input type="checkbox"/>				
2									Value	<input type="checkbox"/>				
3									Value	<input type="checkbox"/>				
4									Value	<input type="checkbox"/>				
5									Value	<input type="checkbox"/>				
6									Value	<input type="checkbox"/>				
7									Value	<input type="checkbox"/>				
8									Value	<input type="checkbox"/>				
9									Value	<input type="checkbox"/>				
10									Value	<input type="checkbox"/>				
11									Value	<input type="checkbox"/>				
12									Value	<input type="checkbox"/>				
13									Value	<input type="checkbox"/>				
14									Value	<input type="checkbox"/>				
15									Value	<input type="checkbox"/>				

We will review actual vs budget for the current month. Enter the BudgetID (2018 Actual and 2018 Budget), fiscal month (Aug), Month and report level (GLCode).

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

System Management > Budgets > Define Budgets Forms (Custom Budget Entry)

CompanyDB\* DB3147\_two18 Form Actual vs Budget

Save Changes Add New Column Delete Form Add New Form Clone Form

**Actual vs Budget # 3015** Primary BudgetID for Accounts List \* 2018 Actual User access (visibility) Application User  Allow period as input  Exclude zero value accounts  Flip sign for Variances (Better/Worse for CR vs DR Accts)

Column Layout

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

Column Position	Column Name	Data Entry Type	BudgetID	Fiscal Month	Month / YTD	Report Level	1st Calc Factor	2nd Calc Factor	3rd Calc Factor	NumberFormat	Hidden	Background Color	Text Color	FormulaResolved	Threshold
1	Month 2018 Actual	ReadOnly	2018 Actual	Aug	Month	GLCode				Value	<input type="checkbox"/>				
2	Month 2018 Budget	ReadOnly	2018 Budget	Aug	Month	GLCode				Value	<input type="checkbox"/>				
3	Month Comments	Comments	2018 Actual	Aug	Month	GLCode	1	2	1	Value	<input type="checkbox"/>	FFFF80			
4	Month Comments History	CommentsHistory	2018 Actual	Aug	Month	GLCode	1	2	1	Value	<input type="checkbox"/>				
5	YTD 2018 Actual	ReadOnly	2018 Actual	Dec	YTD	GLCode				Value	<input type="checkbox"/>				
6	YTD 2018 Budget	ReadOnly	2018 Budget	Dec	YTD	GLCode				Value	<input type="checkbox"/>				
7	YTD Comments	Comments	2018 Actual	Dec	YTD	GLCode	5	6	2	Value	<input type="checkbox"/>	80FFFF			
8	YTD Comments History	CommentsHistory	2018 Actual	Dec	YTD	GLCode	5	6	2	Value	<input type="checkbox"/>				
9										Value	<input type="checkbox"/>				
10										Value	<input type="checkbox"/>				
11										Value	<input type="checkbox"/>				

- Enter comments & review comments history. Enter the BudgetID (2018 Actual), fiscal month (Dec), YTD, report level (GLCode), 1st Calc Factor (1) for 2018 Actual, 2nd Calc Factor (2) for 2018 Budget & 3rd Calc Factor (1) for the 1st set of Comments.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

System Management > Budgets > Define Budgets Forms (Custom Budget Entry)

CompanyDB\* DB3147\_two18 Form Actual vs Budget

Save Changes Add New Column Delete Form Add New Form Clone Form

**Actual vs Budget # 3015** Primary BudgetID for Accounts List \* 2018 Actual User access (visibility) Application User  Allow period as input  Exclude zero value accounts  Flip sign for Variances (Better/Worse for CR vs DR Accts)

Column Layout

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

Column Position	Column Name	Data Entry Type	BudgetID	Fiscal Month	Month / YTD	Report Level	1st Calc Factor	2nd Calc Factor	3rd Calc Factor	NumberFormat	Hidden	Background Color	Text Color	FormulaResolved	Threshold
1	Month 2018 Actual	ReadOnly	2018 Actual	Aug	Month	GLCode				Value	<input type="checkbox"/>				
2	Month 2018 Budget	ReadOnly	2018 Budget	Aug	Month	GLCode				Value	<input type="checkbox"/>				
3	Month Comments	Comments	2018 Actual	Aug	Month	GLCode	1	2	1	Value	<input type="checkbox"/>	FFFF80			
4	Month Comments History	CommentsHistory	2018 Actual	Aug	Month	GLCode	1	2	1	Value	<input type="checkbox"/>				
5	YTD 2018 Actual	ReadOnly	2018 Actual	Dec	YTD	GLCode				Value	<input type="checkbox"/>				
6	YTD 2018 Budget	ReadOnly	2018 Budget	Dec	YTD	GLCode				Value	<input type="checkbox"/>				
7	YTD Comments	Comments	2018 Actual	Dec	YTD	GLCode	5	6	2	Value	<input type="checkbox"/>	80FFFF			
8	YTD Comments History	CommentsHistory	2018 Actual	Dec	YTD	GLCode	5	6	2	Value	<input type="checkbox"/>				
9										Value	<input type="checkbox"/>				
10										Value	<input type="checkbox"/>				
11										Value	<input type="checkbox"/>				

We will review YTD actual vs budget. Enter the BudgetID (2018 Actual and 2018 Budget), fiscal month (Dec), Month and report level (GLCode).

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

System Management > Budgets > Define Budgets Forms (Custom Budget Entry)

CompanyDB\* DB3147\_two18 Form Actual vs Budget

Save Changes Add New Column Delete Form Add New Form Clone Form

**Actual vs Budget # 3015** Primary BudgetID for Accounts List \* 2018 Actual User access (visibility) Application User  Allow period as input  Exclude zero value accounts  Flip sign for Variances (Better/Worse for CR vs DR Accts)

Column Layout

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

Column Position	Column Name	Data Entry Type	BudgetID	Fiscal Month	Month / YTD	Report Level	1st Calc Factor	2nd Calc Factor	3rd Calc Factor	NumberFormat	Hidden	Background Color	Text Color	FormulaResolved	Threshold
1	Month 2018 Actual	ReadOnly	2018 Actual	Aug	Month	GLCode				Value	<input type="checkbox"/>				
2	Month 2018 Budget	ReadOnly	2018 Budget	Aug	Month	GLCode				Value	<input type="checkbox"/>				
3	Month Comments	Comments	2018 Actual	Aug	Month	GLCode	1	2	1	Value	<input type="checkbox"/>	FFFF80			
4	Month Comments History	CommentsHistory	2018 Actual	Aug	Month	GLCode	1	2	1	Value	<input type="checkbox"/>				
5	YTD 2018 Actual	ReadOnly	2018 Actual	Dec	YTD	GLCode				Value	<input type="checkbox"/>				
6	YTD 2018 Budget	ReadOnly	2018 Budget	Dec	YTD	GLCode				Value	<input type="checkbox"/>				
7	YTD Comments	Comments	2018 Actual	Dec	YTD	GLCode	5	6	2	Value	<input type="checkbox"/>	80FFFF			
8	YTD Comments History	CommentsHistory	2018 Actual	Dec	YTD	GLCode	5	6	2	Value	<input type="checkbox"/>				
9										Value	<input type="checkbox"/>				
10										Value	<input type="checkbox"/>				
11										Value	<input type="checkbox"/>				

Enter YTD comments & review comments history. Enter the BudgetID(2018 Actual), fiscal month (Dec), YTD, report level (GLCode), 1st Calc Factor (5) for 2018 Actual, 2nd Calc Factor (6) for 2018 Budget & 3rd Calc Factor (2) for the 2nd set of Comments.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

System Management > Budgets > Define Budgets Forms (Custom Budget Entry)

CompanyDB\* DB3147\_two18 Form Actual vs Budget

Save Changes Add New Column Delete Form Add New Form Clone Form

Actual vs Budget # 3015 Primary BudgetID for Accounts List \* 2018 Actual User access (visibility) Application User

Allow period as input  Exclude zero value accounts  Flip sign for Variances (Better/Worse for CR vs DR Accts)

Column Layout

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

Column Position	Column Name	Data Entry Type	BudgetID	Fiscal Month	Month / YTD	Report Level	1st Calc Factor	2nd Calc Factor	3rd Calc Factor	NumberFormat	Hidden	Background Color	Text Color	FormulaResolved	Threshold
1	Month 2018 Actual	ReadOnly	2018 Actual	Aug	Month	GLCode				Value	<input type="checkbox"/>				
2	Month 2018 Budget	ReadOnly	2018 Budget	Aug	Month	GLCode				Value	<input type="checkbox"/>				
3	Month Comments	Comments	2018 Actual	Aug	Month	GLCode	1	2	1	Value	<input type="checkbox"/>	FFFF80			
4	Month Comments History	CommentsHistory	2018 Actual	Aug	Month	GLCode	1	2	1	Value	<input type="checkbox"/>				
5	YTD 2018 Actual	ReadOnly	2018 Actual	Dec	YTD	GLCode				Value	<input type="checkbox"/>				
6	YTD 2018 Budget	ReadOnly	2018 Budget	Dec	YTD	GLCode				Value	<input type="checkbox"/>				
7	YTD Comments	Comments	2018 Actual	Dec	YTD	GLCode	5	6	2	Value	<input type="checkbox"/>	80FFFF			
8	YTD Comments History	CommentsHistory	2018 Actual	Dec	YTD	GLCode	5	6	2	Value	<input type="checkbox"/>				
9										Value	<input type="checkbox"/>				
10										Value	<input type="checkbox"/>				
11										Value	<input type="checkbox"/>				

You have the option to select a color for your data. Just double-click on the cell and make a selection. In this example, we will select colors for the month comments and YTD comments.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

System Management > Budgets > Define Budgets Forms (Custom Budget Entry)

CompanyDB\* DB3147\_two18 Form Actual vs Budget

Save Changes Add New Column Delete Form Add New Form Clone Form

**Actual vs Budget # 3015** Primary BudgetID for Accounts List \* 2018 Actual User access (visibility) Application User  Allow period as input  Exclude zero value accounts  Flip sign for Variances (Better/Worse for CR vs DR Accts)

Column Layout

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

Column Position	Column Name	Data Entry Type	BudgetID	Fiscal Month	Month / YTD	Report Level	1st Calc Factor	2nd Calc Factor	3rd Calc Factor	NumberFormat	Hidden	Background Color	Text Color	FormulaResolved	Threshold
1	Month 2018 Actual	ReadOnly	2018 Actual	Aug	Month	GLCode				Value	<input type="checkbox"/>				
2	Month 2018 Budget	ReadOnly	2018 Budget	Aug	Month	GLCode				Value	<input type="checkbox"/>				
3	Month Comments	Comments	2018 Actual	Aug	Month	GLCode	1	2	1	Value	<input type="checkbox"/>	FFFF80			
4	Month Comments History	CommentsHistory	2018 Actual	Aug	Month	GLCode	1	2	1	Value	<input type="checkbox"/>				
5	YTD 2018 Actual	ReadOnly	2018 Actual	Dec	YTD	GLCode				Value	<input type="checkbox"/>				
6	YTD 2018 Budget	ReadOnly	2018 Budget	Dec	YTD	GLCode				Value	<input type="checkbox"/>				
7	YTD Comments	Comments	2018 Actual	Dec	YTD	GLCode	5	6	2	Value	<input type="checkbox"/>	80FFFF			
8	YTD Comments History	CommentsHistory	2018 Actual	Dec	YTD	GLCode	5	6	2	Value	<input type="checkbox"/>				
9										Value	<input type="checkbox"/>				
10										Value	<input type="checkbox"/>				
11										Value	<input type="checkbox"/>				



# UG-Custom Budget Entry

zgidwani



Click on **Save Changes**.

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

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

System Management > Budgets > Define Budgets Forms (Custom Budget Entry)

CompanyDB\* DB3147\_two18 Form Actual vs Budget

**Save Changes** Add New Column Delete Form Add New Form Clone Form

**Actual vs Budget # 3015** Primary BudgetID for Accounts List \* 2018 Actual User access (visibility) Application User

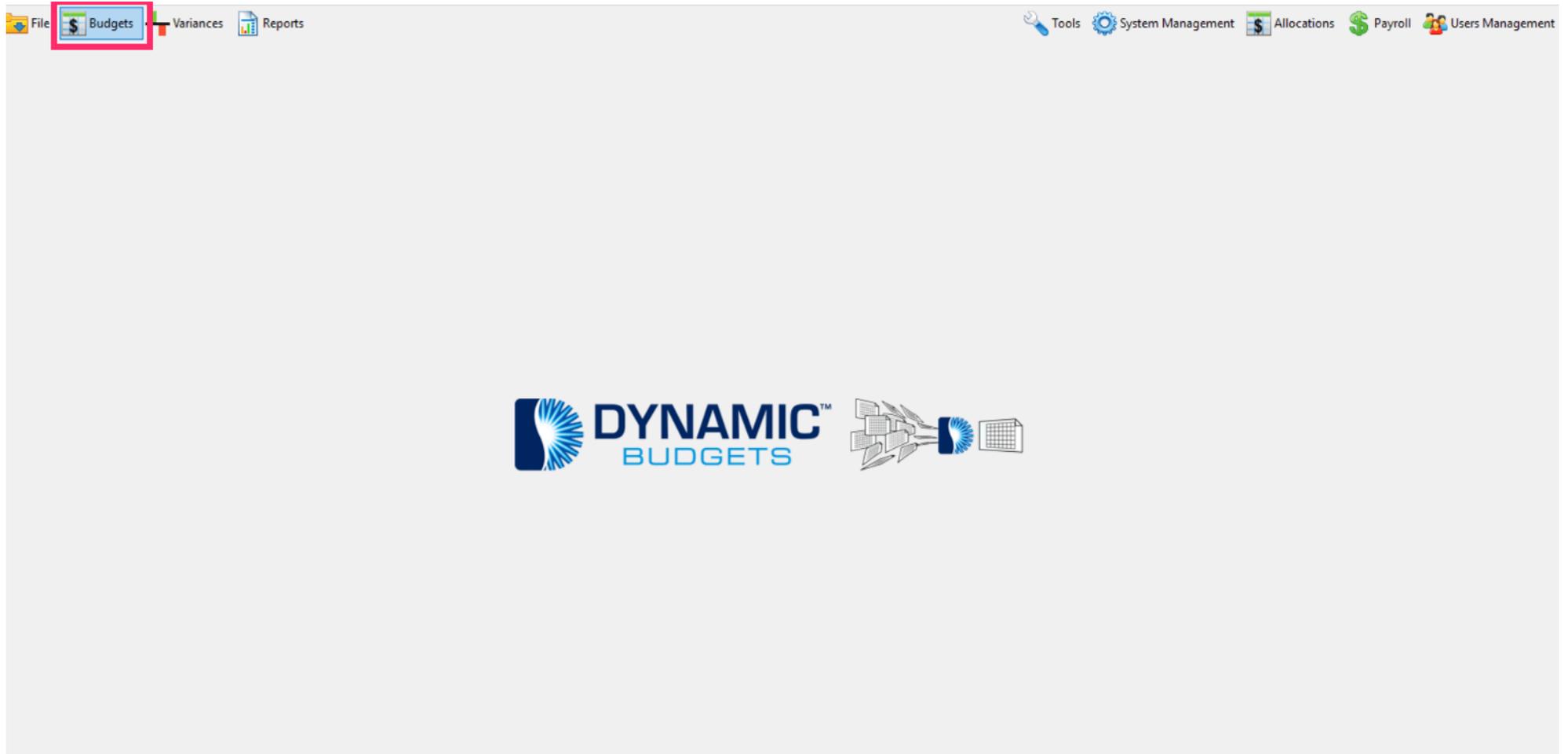
Allow period as input  Exclude zero value accounts  
 Flip sign for Variances (Better/Worse for CR vs DR Accts)

Column Layout

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

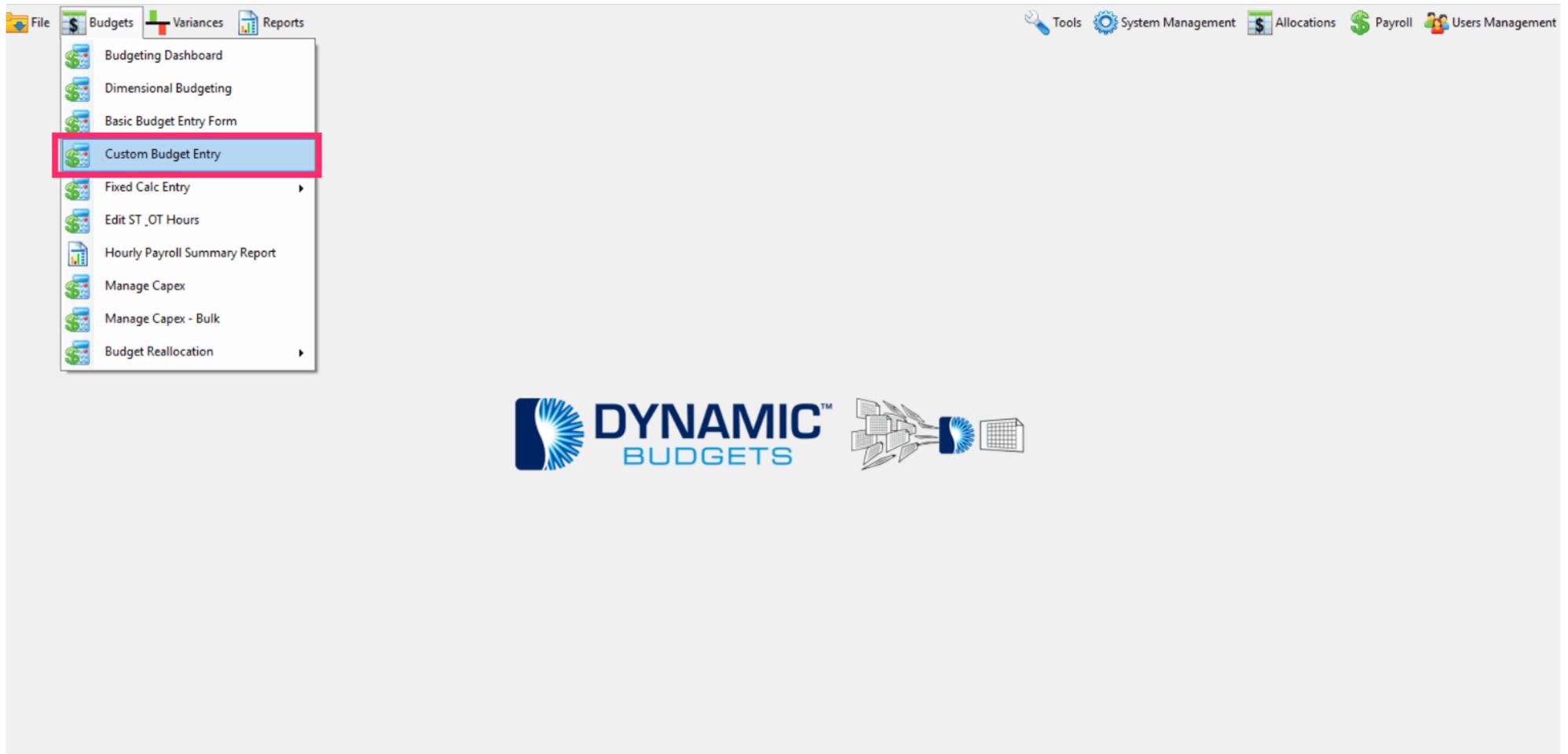
Column Position	Column Name	Data Entry Type	BudgetID	Fiscal Month	Month / YTD	Report Level	1st Calc Factor	2nd Calc Factor	3rd Calc Factor	NumberFormat	Hidden	Background Color	Text Color	FormulaResolved	Threshold
1	Month 2018 Actual	ReadOnly	2018 Actual	Aug	Month	GLCode				Value	<input type="checkbox"/>				
2	Month 2018 Budget	ReadOnly	2018 Budget	Aug	Month	GLCode				Value	<input type="checkbox"/>				
3	Month Comments	Comments	2018 Actual	Aug	Month	GLCode	1	2	1	Value	<input type="checkbox"/>	FFFF80			
4	Month Comments History	CommentsHistory	2018 Actual	Aug	Month	GLCode	1	2	1	Value	<input type="checkbox"/>				
5	YTD 2018 Actual	ReadOnly	2018 Actual	Dec	YTD	GLCode				Value	<input type="checkbox"/>				
6	YTD 2018 Budget	ReadOnly	2018 Budget	Dec	YTD	GLCode				Value	<input type="checkbox"/>				
7	YTD Comments	Comments	2018 Actual	Dec	YTD	GLCode	5	6	2	Value	<input type="checkbox"/>	80FFFF			
8	YTD Comments History	CommentsHistory	2018 Actual	Dec	YTD	GLCode	5	6	2	Value	<input type="checkbox"/>				
9										Value	<input type="checkbox"/>				
10										Value	<input type="checkbox"/>				
11										Value	<input type="checkbox"/>				

Now let's look at the Custom Budget Entry screen. Click on **Budgets**.





Click on **Custom Budget Entry**.





Click on the CompanyDB dropdown list. Make your selection. In this example, select DB3147\_two18.

The screenshot shows the 'Custom Budget Entry' window. At the top, there are navigation tabs: 'File', 'Budgets', 'Variances', and 'Reports'. On the right, there are icons for 'Tools', 'System Management', 'Allocations', 'Payroll', and 'Users Management'. The main area has a header 'Budgets > Custom Budget Entry'. Below this, there are several dropdown menus: 'CompanyDB\*' (highlighted with a red box and containing 'DB3147\_two18'), 'OrgUnit RollUp' (containing '<all>'), 'Object RollUp' (containing '<all>'), and 'Form' (containing 'Actual vs Budget'). There are also checkboxes for 'Show Simple Comments', 'Show Comments to date', and 'Show Edit / Approval Status'. Below the form, there is a yellow banner that says 'Accounts highlighted are itemized, click the account number link to edit line items'. At the bottom, there are tabs for 'Dashboard' and 'Account Details', and a toolbar with 'Print', 'Export to Excel', 'Print to PDF', and 'AutoSize Columns'.

Click on the OrgUnit & Object Rollup dropdown lists. Make your selection. In this example, select all for both.

The screenshot displays the 'Custom Budget Entry' application interface. The 'OrgUnit Rollup' and 'Object Rollup' dropdown menus are highlighted with a red box, and both are set to '<all>'. The interface includes a top navigation bar with 'File', 'Budgets', 'Variances', and 'Reports'. A secondary navigation bar contains 'Tools', 'System Management', 'Allocations', 'Payroll', and 'Users Management'. The main content area shows a form for 'Custom Budget Entry' with fields for 'CompanyDB', 'DB3147\_two18', 'OrgUnit', and 'Object'. Below the form are checkboxes for 'Show Simple Comments', 'Show Comments to date', and 'Show Edit / Approval Status'. A yellow banner indicates 'Accounts highlighted are itemized, click the account number link to edit line items'. The bottom section includes a 'Dashboard' tab, 'Account Details', and a 'Save Accounts' button. A footer area contains 'Print', 'Export to Excel', 'Print to PDF', 'AutoSize Columns', 'Display Level 2', and 'Row Format <No Format>'.

Click on the Form dropdown list. Make your selection. In this example, we will select the form we just created which is named Actual vs. Budget.

The screenshot shows the 'Custom Budget Entry' application interface. At the top, there are navigation tabs for 'File', 'Budgets', 'Variances', and 'Reports'. On the right, there are icons for 'Tools', 'System Management', 'Allocations', 'Payroll', and 'Users Management'. The main header area is light blue and contains the following fields and controls:

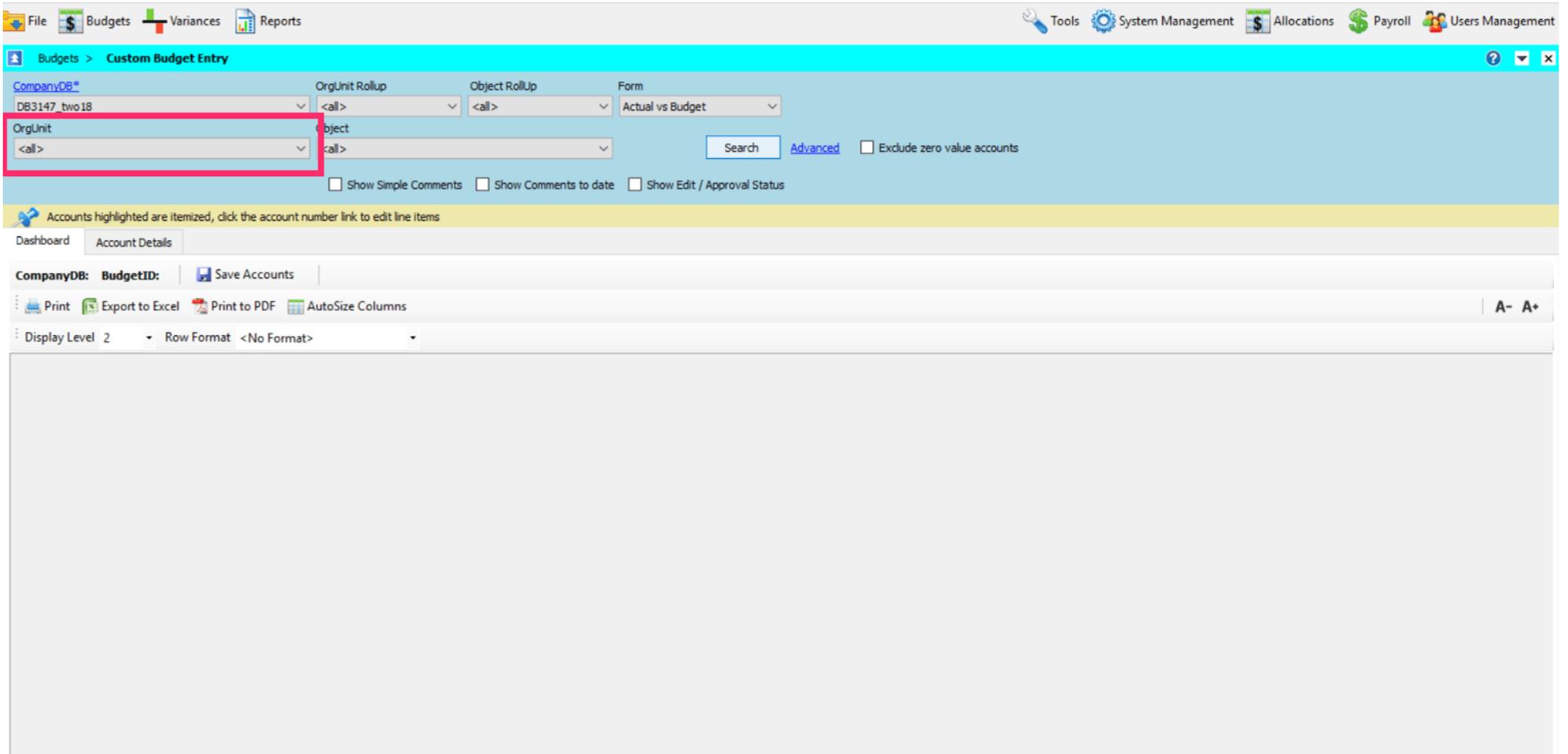
- CompanyDB:** A dropdown menu with 'DB3147\_two18' selected.
- OrgUnit Rollup:** A dropdown menu with '<all>' selected.
- Object RollUp:** A dropdown menu with '<all>' selected.
- Form:** A dropdown menu with 'Actual vs Budget' selected. This dropdown is highlighted with a red rectangular box.
- OrgUnit:** A dropdown menu with '<all>' selected.
- Object:** A dropdown menu with '<all>' selected.
- Search:** A button.
- Advanced:** A link.
- Exclude zero value accounts:** A checkbox.
- Show Simple Comments:** A checkbox.
- Show Comments to date:** A checkbox.
- Show Edit / Approval Status:** A checkbox.

Below the header, there is a yellow banner with the text: 'Accounts highlighted are itemized, click the account number link to edit line items'. Below this, there are tabs for 'Dashboard' and 'Account Details'. The main content area is white and contains the following elements:

- CompanyDB:** A dropdown menu.
- BudgetID:** A dropdown menu.
- Save Accounts:** A button.
- Print:** A button.
- Export to Excel:** A button.
- Print to PDF:** A button.
- AutoSize Columns:** A button.
- Display Level:** A dropdown menu with '2' selected.
- Row Format:** A dropdown menu with '<No Format>' selected.

At the bottom right of the main content area, there are font size controls: 'A- A+'.

 Click on the OrgUnit dropdown list. Make your selection. In this example, select all.



 Click on the Object dropdown list. Make your selection. In this example, select all.

The screenshot displays the 'Custom Budget Entry' application interface. At the top, there is a navigation bar with 'File', 'Budgets', 'Variances', and 'Reports'. Below this is a secondary bar with 'Tools', 'System Management', 'Allocations', 'Payroll', and 'Users Management'. The main form area features several dropdown menus: 'CompanyDB\*' (set to 'DB3147\_two18'), 'OrgUnit Rollup' (set to '<all>'), 'Object RollUp' (set to '<all>'), and 'Form' (set to 'Actual vs Budget'). The 'Object RollUp' dropdown is highlighted with a red box, and its content '<all>' is also highlighted. Below the dropdowns are checkboxes for 'Show Simple Comments', 'Show Comments to date', and 'Show Edit / Approval Status'. A yellow banner below the form states 'Accounts highlighted are itemized, click the account number link to edit line items'. The bottom section includes 'Dashboard', 'Account Details', 'CompanyDB: BudgetID:', 'Save Accounts', and utility buttons like 'Print', 'Export to Excel', 'Print to PDF', and 'AutoSize Columns'.



Click on **Search**.

The screenshot shows the 'Custom Budget Entry' application interface. At the top, there is a navigation bar with icons for File, Budgets, Variances, and Reports. On the right side of the navigation bar, there are icons for Tools, System Management, Allocations, Payroll, and Users Management. Below the navigation bar, the main content area is titled 'Custom Budget Entry'. It features several dropdown menus for 'CompanyDB\*' (DB3147\_two18), 'OrgUnit Rollup' (<all>), 'Object RollUp' (<all>), and 'Form' (Actual vs Budget). Below these are dropdowns for 'OrgUnit' (<all>) and 'Object' (<all>). A 'Search' button is highlighted with a red box. To the right of the 'Search' button are links for 'Advanced' and a checkbox for 'Exclude zero value accounts'. Below these are three checkboxes: 'Show Simple Comments', 'Show Comments to date', and 'Show Edit / Approval Status'. A yellow banner below the search area states: 'Accounts highlighted are itemized, click the account number link to edit line items'. At the bottom, there is a 'Dashboard' tab and an 'Account Details' tab. Below the tabs, there is a 'CompanyDB: BudgetID:' label and a 'Save Accounts' button. At the very bottom, there are icons for 'Print', 'Export to Excel', 'Print to PDF', and 'AutoSize Columns', along with a font size control 'A- A+' and a 'Display Level 2' dropdown menu.

Now you see the Custom Budget Entry screen we created which reviews the month actual & budget along with comments & comments history as well as YTD actual & budget along with YTD comments & comments history.

AccountNum	AccountDescr	Month 2018 Actual	Month 2018 Budget	Month Comments	Month Comments History	YTD 2018 Actual	YTD 2018 Budget	YTD Comments	YTD Comments History
[A]	[A]	=	=	Eq	[A]	=	=	Eq	[A]
000-1140-00	Savings	-	-			-	-		
000-4100-00	Sales	-	-			-	-		
000-4110-01	US Sales - Retail/Parts	-	-			-	-		
000-4110-02	US Sales - Finished Goods	-	-			-	-		
000-4111-01	Canadian Sales - Retail/Parts	-	-			-	-		
000-4111-02	Canadian Sales - Finished Goods	-	-			-	-		
000-4112-01	AustralAsian Sales - Retail/Parts	-	-			-	-		
000-4112-02	AustralAsian Sales - Finished Goods	-	-			-	-		
000-4114-01	Germany Sales - Retail/Parts	-	-			-	-		
000-4114-02	Germany Sales - Finished Goods	-	-			-	-		
000-4115-01	United Kingdom Sales - Retail/Parts	-	-			-	-		
000-4115-02	United Kingdom Sales - Finished Goods	-	-			-	-		
000-4116-01	South Africa - Retail/Parts	-	-			-	-		



That's It. You're Done.



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