

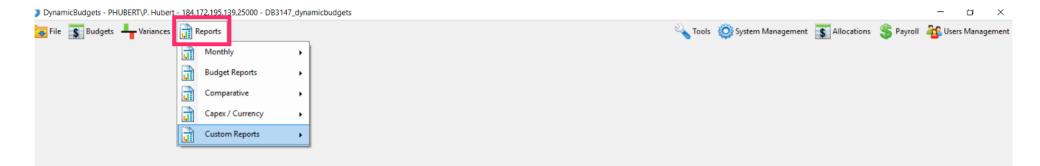
Dynamic Budgets User Guide for Custom Reports



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Click on Reports.



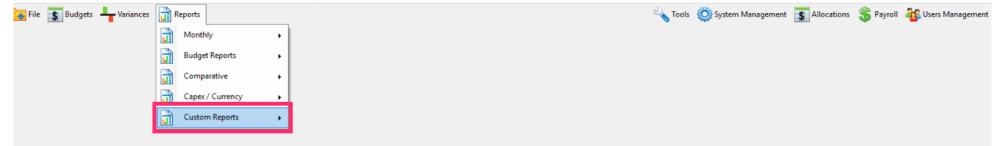


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Click on Custom Reports.

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





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Click on Custom Reports again.

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





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

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Click on the OrgUnit Rollup dropdown list. Make a selection. For this example, we will select G&A.

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Click on the Object Rollup dropdown list. Make a selection. For this example, we will select Fees.

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Click on the Report dropdown list. Make a selection. For this example, click on Monthly Summary w/Budget.

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Click on the Select Month dropdown list. Make a selection. For this example, we will select Jan.

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Note: Now you will see the values and format for the report selected. In this example, we see July actuals, the July budget and the variance.

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Let's choose a different Object Rollup, COGS.

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• Note: The advanced option is used when customers have long account numbers and want to filter by account segments. Click on Advanced.

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In this example, let's filter by seg1 which is 100. Note: All accounts are displayed for this segment.

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▶ 100-6100-00 Training - Administration	1,500	1,500 -	0.00 %				
200-6100-00 Training - Accounting	500	500 -	0.00 %				
300-6100-00 Training - Sales	1,520	1,520 -	0.00 %				
400-6100-00 Training - Service/installation	3,570	3,570 -	0.00 %				



Click on the X to close this window.

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▶ 100-6100-00	Training - Administration	1,500	1,500	-	0.00 %	2					
200-6100-00	Training - Accounting	500	500	-	0.00 %	2					
300-6100-00	Training - Sales	1,520	1,520	-	0.00 %	2					
400-6100-00	Training - Service/installation	3,570	3,570	-	0.00 %						
500-6100-00	Training - Consulting/Training	-	-	-	0.00 %	2					
600-6100-00	Training - Purchasing/Receiving	-	-	-	0.00 %						



That's It. You're Done.



That's It. You're Done.