



Dynamic Budgets User Guide for How to Add Current Year Actuals for All Companies



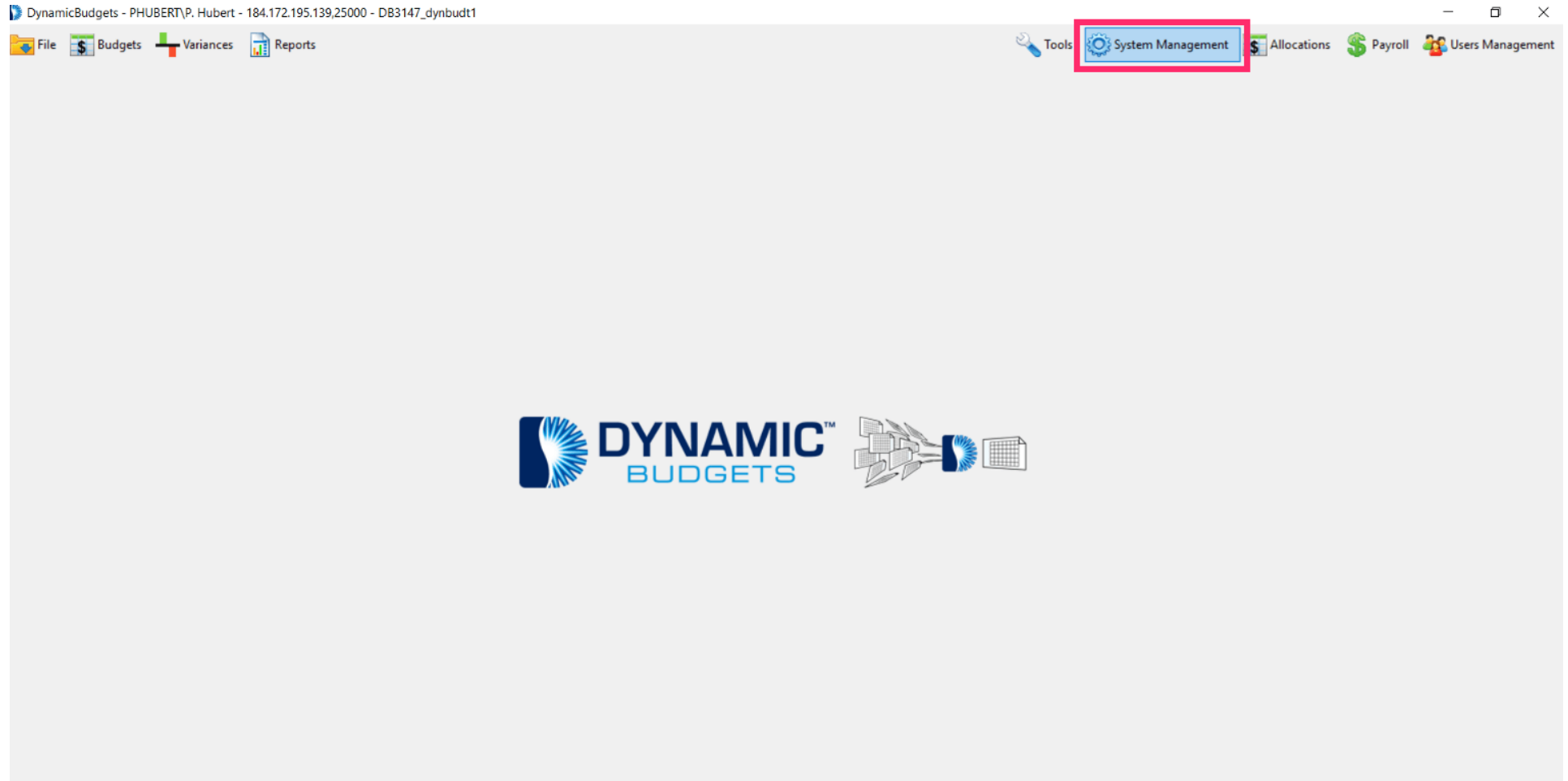
User Guide

for

How to Add Current Year Actuals for All Companies

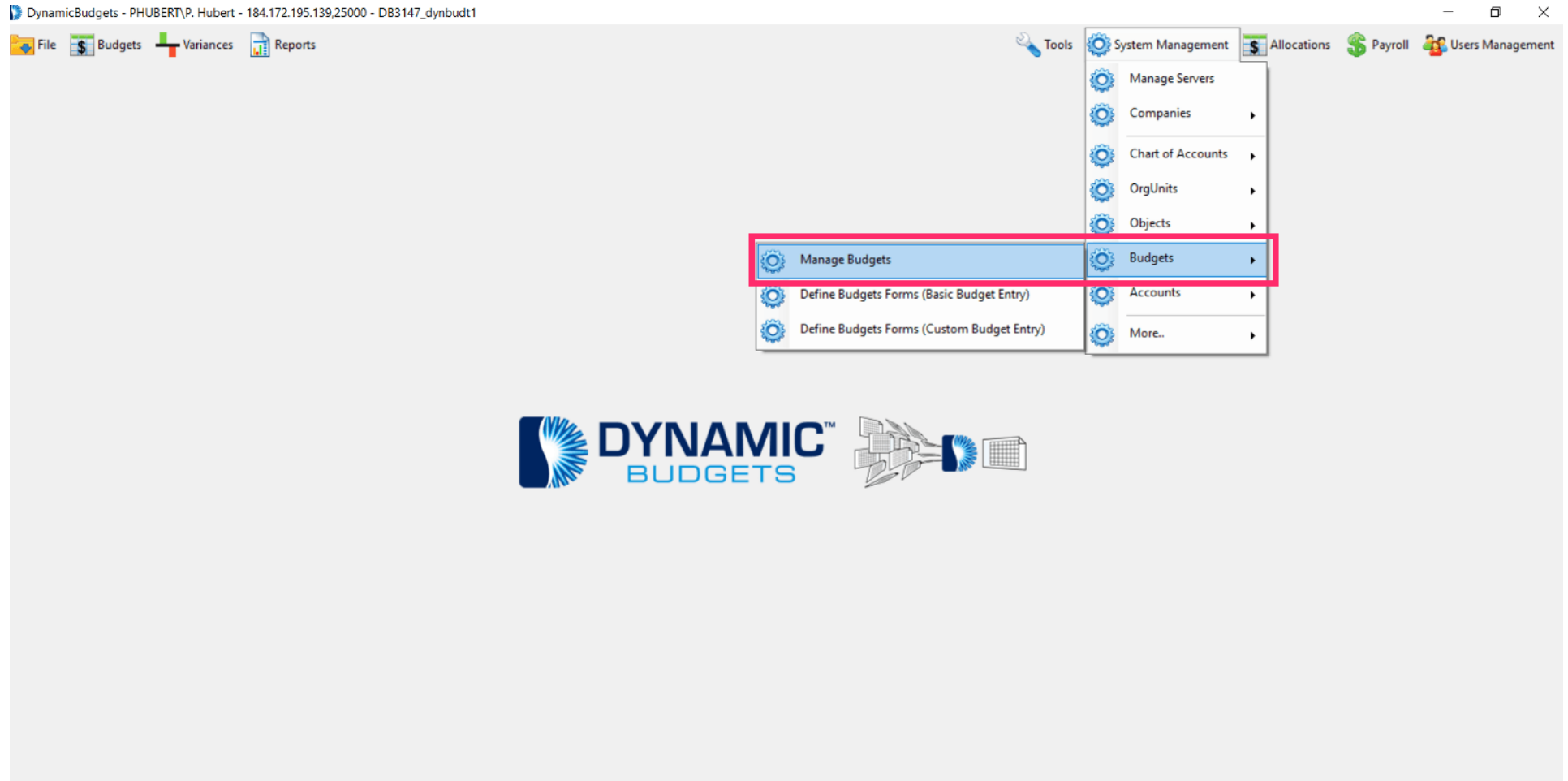


Click on **System Management**.





Click on **Budgets, Manage Budgets.**





Click on the Company DB dropdown list. For this example, select **all**.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Manage Budgets

Manage Budgets

CompanyDB: TWO (dropdown menu open showing: TWO, <all>, THREE, TWO)

Show Budgets

Link ERP Budget: (dropdown menu)

Link to Company (specified above): Selected Budget

All Budgets

Selected Budget for All Companies

For Company specified above (or <all>):

Enter New Custom Budget: (text input)

Create New Budget

Budget Year: 2018 # of Years: 3

Create Average

Historical Average: (dropdown menu)

e.g. Historical Avg for FY2016 and 3 closed years: (2012 - 2014)

Save Budgets Delete Purge * Budget description is mandatory for all budgets, else they would not save Show Company Tags

Print Export to Excel Print to PDF AutoSize Columns

A- A+



Click on the Link ERP Budgets dropdown list. Note: The list is blank. This is because you have to choose a Company DB first, then select a Link ERP Budget.

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Manage Budgets

CompanyDB <all> Show Budgets

Link ERP Budgets

Link to Company (specified above)

Selected Budget

All Budgets

Selected Budget for All Companies

Enter New Custom Budget

Create New Budget

Budget Year # of Years

Historical Average 2018 3 Create Average

e.g. Historical Avg for FY2016 and 3 closed years: (2012 - 2014)

* Budget description is mandatory for all budgets, else they would not save Show Company Tags

AutoSize Columns



Click on the Company DB dropdown list. For this example, select **TWO**.

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Manage Budgets

Manage Budgets

CompanyDB: <all> (dropdown menu is open showing options: <all>, THREE, TWO)

Show Budgets

Link ERP Budget: (dropdown menu)

Link to Company (specified above)

Selected Budget

All Budgets

Selected Budget for All Companies

Enter New Custom Budget: (text input)

Create New Budget

For Company specified above (or <all>)

Budget Year: 2018 (dropdown)

of Years: 3 (dropdown)

Create Average

Historical Average: (text input)

e.g. Historical Avg for FY2016 and 3 closed years: (2012 - 2014)

Save Budgets Delete Purge *Budget description is mandatory for all budgets, else they would not save Show Company Tags

Print Export to Excel Print to PDF AutoSize Columns



Click on the Link ERP Budgets dropdown list. For this example, select **2018 Actual**.

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Manage Budgets

CompanyDB: TWO Show Budgets

Link ERP Budgets

Link to Company (specified above)

Selected Budget

Enter New Custom Budget

Create New Budget

All Budgets

Budget Year: 2018 # of Years: 3

Create Average

e.g. Historical Avg for FY2016 and 3 closed years: (2012 - 2014)

* Budget description is mandatory for all budgets, else they would not save Show Company Tags

AutoSize Columns

2010 Actual
2011 Actual
2012 Actual
2013 Actual
2014 Actual
2015 Actual
2016 Actual
2017 Actual
2018 Actual
2019 Actual
BUDGET 2005
BUDGET 2006
BUDGET 2008
BUDGET 4
BUDGET1
BUDGET2
BUDGET3
ENC####Y2014
ENC####Y2015
ENC####Y2016
ENC####Y2017
ENC####Y2018



Click on **Selected Budget for All Companies**.

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Manage Budgets

Manage Budgets

CompanyDB: TWO Show Budgets

Link ERP Budgets: 2018 Actual Link to Company (specified above): Selected Budget

Enter New Custom Budget: For Company specified above (or <all>): Create New Budget

All Budgets

Selected Budget for All Companies

Historical Average: 2018 Budget Year: 3 # of Years: Create Average

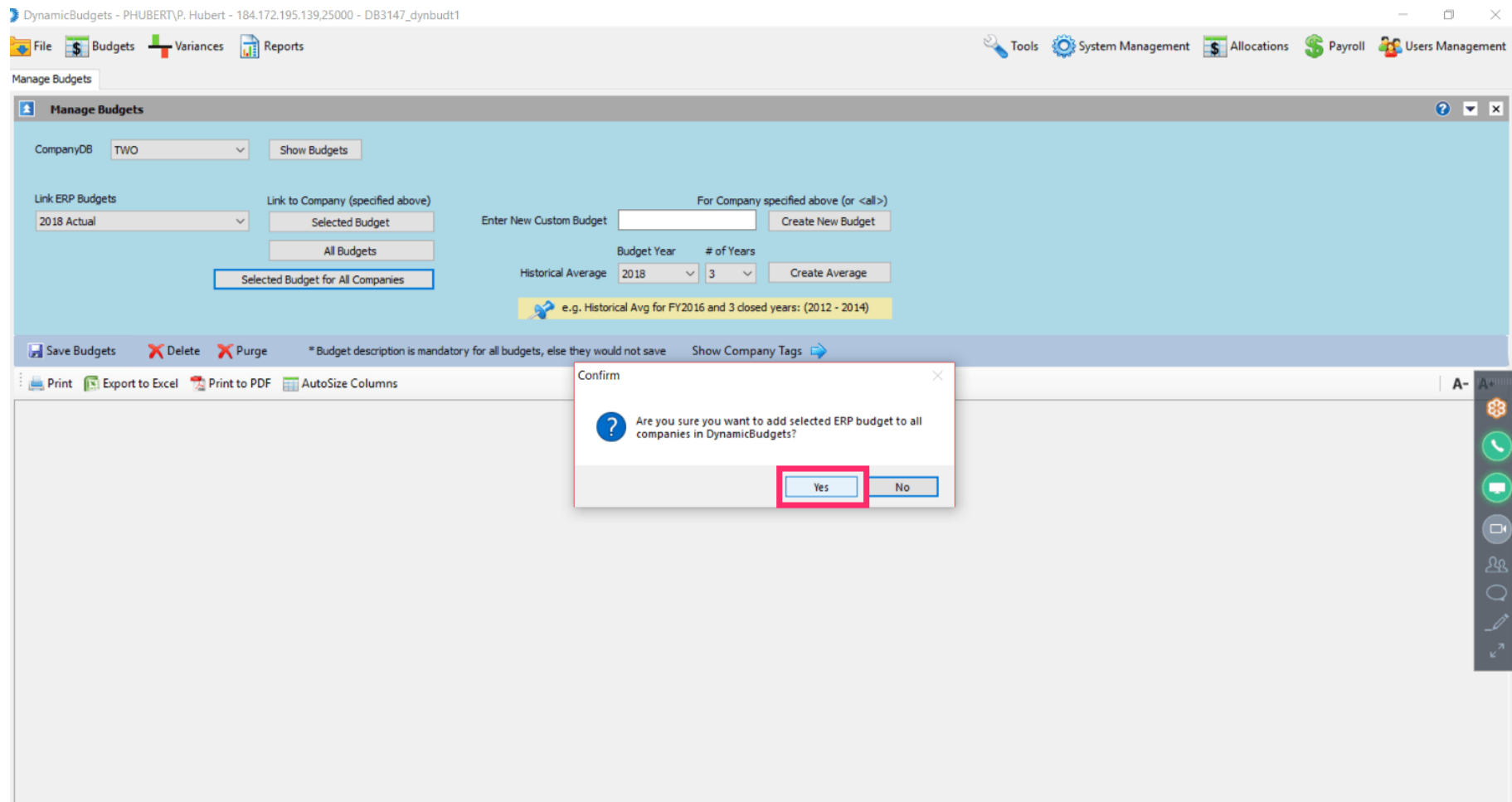
e.g. Historical Avg for FY2016 and 3 closed years: (2012 - 2014)

Save Budgets Delete Purge *Budget description is mandatory for all budgets, else they would not save Show Company Tags

Print Save Budgets xcel Print to PDF AutoSize Columns



A message will appear that reads, **Are you sure you want to add selected ERP budget to all companies in Dynamic Budgets?** Click **Yes** to confirm.





Budgets are now displayed.

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Manage Budgets

CompanyDB: TWO Show Budgets

Link ERP Budgets: 2018 Actual Link to Company (specified above): Selected Budget Enter New Custom Budget: For Company specified above (or <all>): Create New Budget

All Budgets Selected Budget for All Companies

Budget Year: 2018 # of Years: 3 Create Average

e.g. Historical Avg for FY2016 and 3 closed years: (2012 - 2014)

Save Budgets Delete Purge *Budget description is mandatory for all budgets, else they would not save Show Company Tags

Print Export to Excel Print to PDF AutoSize Columns Rows: 6 A+

CompanyDB	BudgetID (15)	Description (30)	Year	FromDate	ToDate	Source	Locked	Actual	Imported	SortOrder	UserRoleAccess	Is Budgeted	InSummary	InLookups	InRpt
DB3147_TW015	2016 Actual	2016 Actual	2016	01/01/2016	12/31/2016	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TW015	2017 Actual	2017 Actual	2017	01/01/2017	12/31/2017	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TW015	2018 Actual	2018 Actual	2018	01/01/2018	12/31/2018	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TW015	PH Budget	PH Budget	2017	11/01/2017	11/01/2017	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TW015	Test 2018 Bud	Test 2018 Bud	2017	11/01/2017	11/01/2017	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TW015	Test FCAST 2017	Test FCAST 2017	2017	11/01/2017	11/01/2017	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



Click on the X to close.

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Tools System Management Allocations Payroll Users Management

Manage Budgets

Manage Budgets

CompanyDB: TWO Show Budgets

Link ERP Budgets: 2018 Actual Link to Company (specified above): Selected Budget Enter New Custom Budget: For Company specified above (or <all>): Create New Budget

All Budgets Selected Budget for All Companies

Budget Year: 2018 # of Years: 3 Create Average

e.g. Historical Avg for FY2016 and 3 closed years: (2012 - 2014)

Save Budgets Delete Purge * Budget description is mandatory for all budgets, else they would not save Show Company Tags

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CompanyDB	BudgetID (15)	Description (30)	Year	FromDate	ToDate	Source	Locked	Actual	Imported	SortOrder	UserRoleAccess	IsBudgeted	InSummary	InLookups	InR
DB3147_TW015	2016 Actual	2016 Actual	2016	01/01/2016	12/31/2016	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TW015	2017 Actual	2017 Actual	2017	01/01/2017	12/31/2017	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TW015	2018 Actual	2018 Actual	2018	01/01/2018	12/31/2018	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TW015	PH Budget	PH Budget	2017	11/01/2017	11/01/2017	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TW015	Test 2018 Bud	Test 2018 Bud	2017	11/01/2017	11/01/2017	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TW015	Test FCAST 2017	Test FCAST 2017	2017	11/01/2017	11/01/2017	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



That's It. You're Done.



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