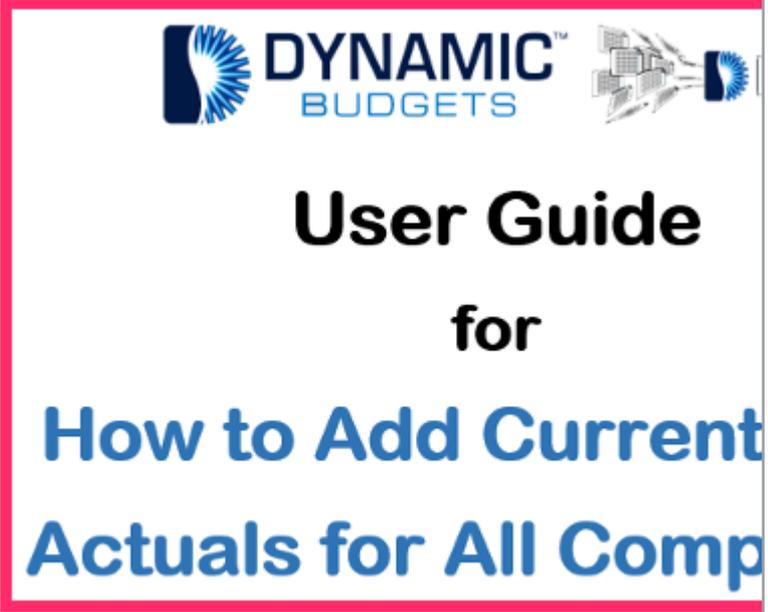|		
1	Dynamic Budgets User Guide for How to Add Current Year Actuals for All Companies	

DYNAMIC BUDGETS

User Guide

for

How to Add Current

Actuals for All Comp

2	Click on System Management.	Tools System Management Allocations
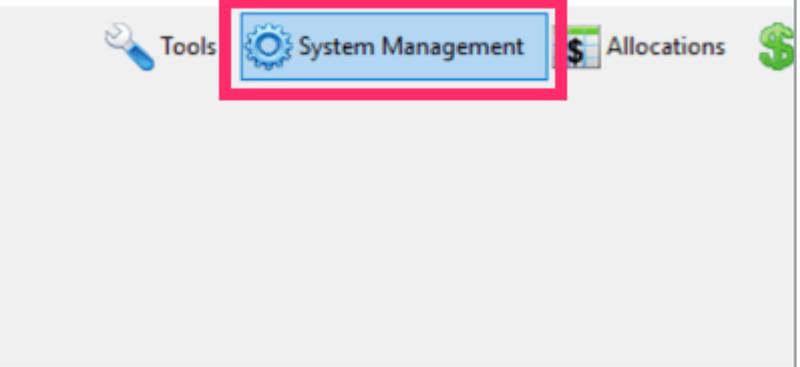
3	Click on Budgets, Manage Budgets.	Manage Budgets Define Budgets Forms (Basic Budget Entry) Define Budgets Forms (Custom Budget Entry)

4	

Click on the Company DB dropdown list.

For this example, select all.

Manage Budgets

CompanyDB TWO ⌄
- <all>
- THREE
- TWO

Show Budgets

Link ERP Budget...   Link to Company (specified a...
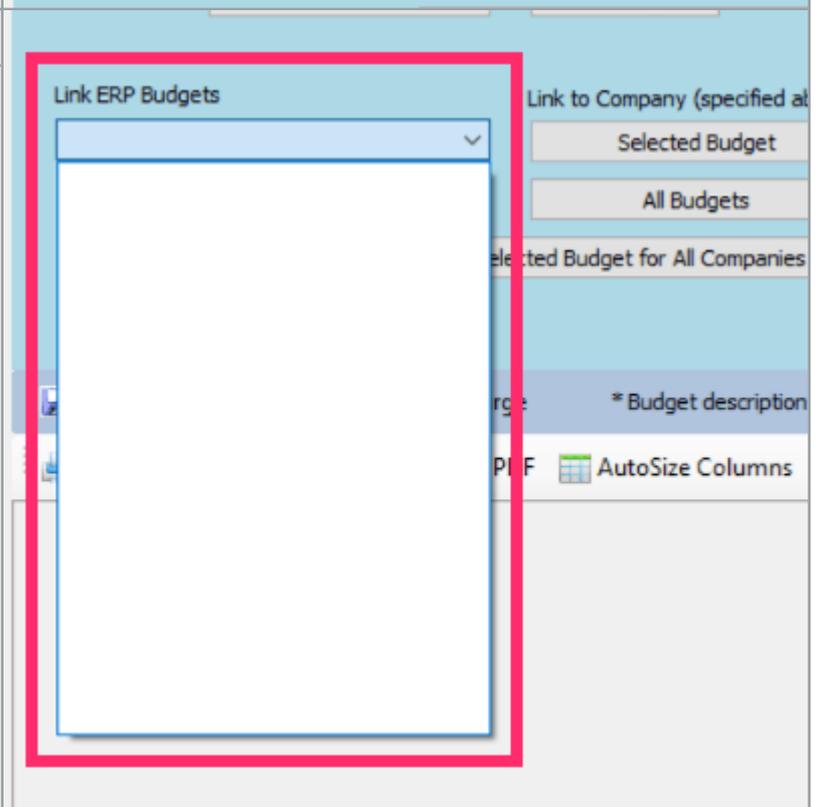Selected Budget
All Budgets
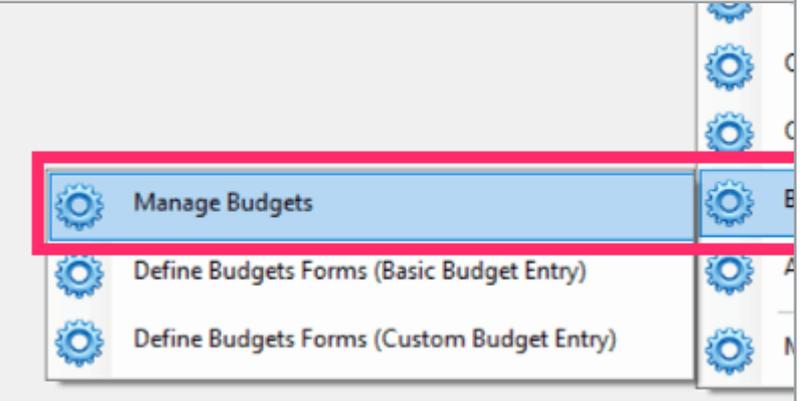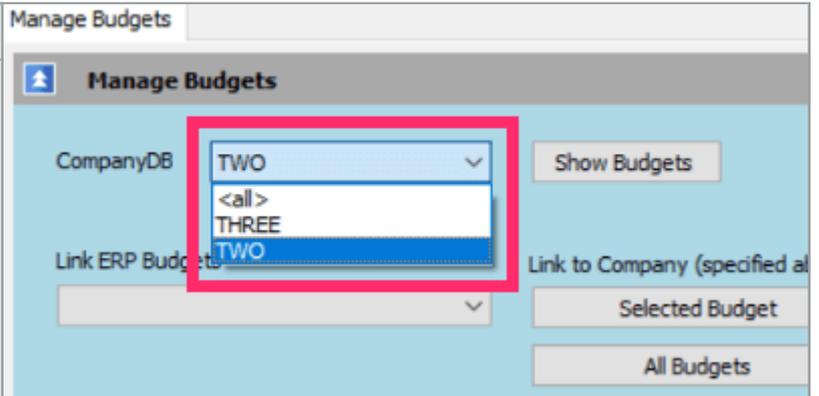
5	

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.

Link ERP Budgets

Link to Company (specified a...
Selected Budget
All Budgets
...ected Budget for All Companies

*Budget description
PI F AutoSize Columns

6	

Click on the Company DB dropdown list.

For this example, select TWO.

Manage Budgets

CompanyDB <all> ⌄
- <all>
- THREE
- TWO

Show Budgets

Link ERP Bud...   Link to Company (specified a...
Selected Budget
All Budgets
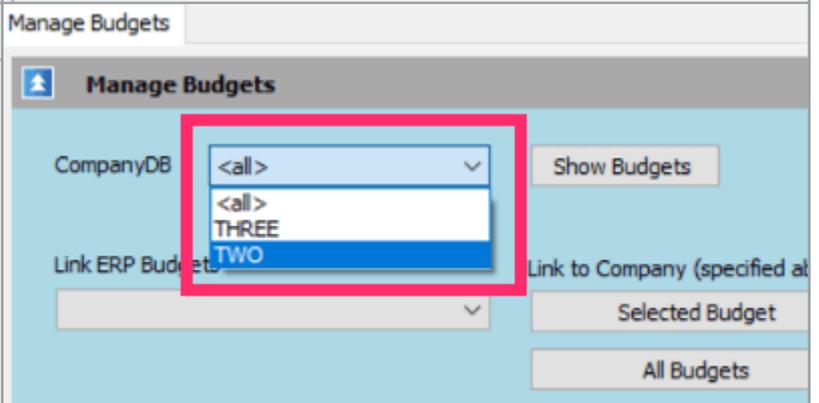
7	Click on the Link ERP Budgets dropdown list. For this example, select 2018 Actual.	Link ERP Budgets 2010 Actual 2011 Actual 2012 Actual 2013 Actual 2014 Actual 2015 Actual 2016 Actual 2017 Actual 2018 Actual 2019 Actual BUDGET 2005 BUDGET 2006 BUDGET 2008 BUDGET 4 BUDGET1 BUDGET2 BUDGET3 ENC##@@###Y2014 ENC##@@###Y2015 ENC##@@###Y2016 ENC##@@###Y2017 ENC##@@###Y2018 Link to Company (specified above) Selected Budget All Budgets Selected Budget for All Companies * Budget description AutoSize Columns
8	Click on Selected Budget for All Companies.	Link to Company (specified above) Selected Budget All Budgets Selected Budget for All Companies Enter Ne Delete Purge * Budget description is mandatory for all bud
9	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.	Are you sure you want to add selected ERP budget to all companies in DynamicBudgets? Yes No

		10
👁	Budgets are now displayed.	

Print   Export to Excel   Print to PDF   AutoSize Columns

CompanyDB	BudgetID (15)	Description (30)	Year
🖽 Ⓐ	Ⓐ	Ⓐ	=
▶ DB3147_TWO15	2016 Actual	2016 Actual	2016
DB3147_TWO15	2017 Actual	2017 Actual	2017
DB3147_TWO15	2018 Actual	2018 Actual	2018
DB3147_TWO15	PH Budget	PH Budget	2017
DB3147_TWO15	Test 2018 Bud	Test 2018 Bud	2017
DB3147_TWO15	Test FCAST 2017	Test FCAST 2017	2017

		11
🖱	Click on the X to close.	

anagement $ Allocations $ Payroll   👥 Users Management

❓ ▼ ☒

		12
🖱	That's It. You're Done.	

DYNAMIC™
BUDGETS

That's It. You're Done.