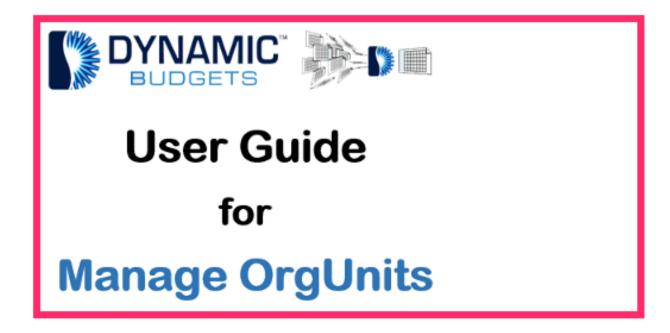
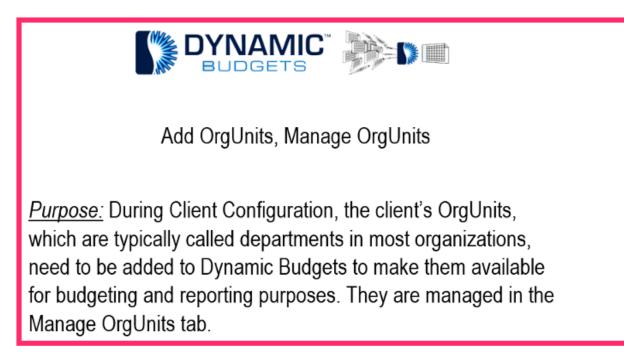


Dynamic Budgets User Guide for Manage OrgUnits





Add OrgUnits, Manage OrgUnits: Module Purpose During Client Configuration, the client's OrgUnits or Depts need to be added to Dynamic Budgets to make them available for budgeting and reporting purposes. They are managed in the Manage OrgUnits tab.





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Click on System Management.

DynamicBudgets - dynbudsm - PHUBERI\SQLEXPRESS - DynamicBudgets 🔧 Tools 🥸 System Management 🛐 Allocations 💲 Payroll 🚳 Users Managemen 📷 File 🏾 🛐 Budgets 🗕 Variances 📊 Reports BUDGETS ***** You have controls. **다** 오오

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Click on OrgUnits, Manage OrgUnits.

DynamicBudgets - dynbudsm - PHUBERT\SQLEXPRESS - DynamicBudgets



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UG-Manage OrgUnits

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Click on Search.

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Manage OrgUnits						0 💌	×
CompanyD8* OrgUnit Rollup OrgUnit Fabrikam ✓							
🚽 Save OrgUnits 🛛 🗙 Delete Selected Show Company Tags 🔿							
🚊 Print 📧 Export to Excel 🛛 🔁 Print to PDF 🔛 AutoSize Columns						A- /	4+

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- Note: If there are descriptions in the ERP OrgUnit Descrip column, we can copy those descriptions to the Description column. Please verify if the descriptions are accurate.

🖉 Dy	namicBud	gets - dynbu	idsm - PHUBERI \S	QLEXPRESS - DynamicBuo	dgets										– u	×
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•	d123	100		Administration				NOT-SET								
	d123	200		Accounting				NOT-SET								
	d123	300		Sales				NOT-SET								
	d123	400		Service/Installation				NOT-SET								
	d123	500		Consulting/Training				NOT-SET								
	d123	600		Purchasing/Receivin				NOT-SET								



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Use Shortcuts: Control C, to copy Control V, to paste OR Right-click copy, paste

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Note: You can change the descriptions in the white Description column by typing in the cell.

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Consulting/Training	I OrgUnits Manage OrgUnits age OrgUnits age OrgUnit Rollup OrgUnit Rollup orgUnit Rollup Save OrgUnits CorgUnit Colspan="2">CorgUnit Rollup Save OrgUnits CorgUnit Descrip Save OrgUnits CorgUnit of Print to PDF AutoSize Columns anyDB ORGUNI Description RP OrgUnit Descrip Manage OrgUnit Administration Administration d123 100 Accounting Accounting d123 200 Saves Sales d123 500 Consulting/Training Consulting/Training	Interpretation Budgets Variances Reports IOrgUnits Manage OrgUnits X age OrgUnits OrgUnit Rollup OrgUnit samyOB* OrgUnit Rollup OrgUnit Save OrgUnits X Delete Selected Show Company Tags Print Export to Excel Print to PDF AutoSize Columns anyDB ORGUNI Description RP OrgUnit Descrip IsBudgeted InReports A A Administration Administration Image and the selection of	IorgUnits Manage OrgUnits age OrgUnits Manage OrgUnits age OrgUnits OrgUnit Rollup Save OrgUnits CorgUnit Rollup Save OrgUnits Delete Selected Show Company Tags Save OrgUnits Description RP OrgUnit 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Accounting RP OrgUnit Description RP OrgUnit Description RP OrgUnit Company Tags Print Seport to Excel Print Relia Company Tags Print Seport to Excel Print Relia Company Tags Accounting RP OrgUnit Description RP OrgUnit Description RP OrgUnit Company Tags Print Seport to Excel Print Relia Company Tags Print Seport to Excel Print Relia Company Tags Accounting Accounting Accounting <!--</td--><td>Budgets Wanage OrgUnit</td><td>I winner Reports Norgonits Norgonits</td><td>I warace in performance in periference in performance in performance in performance in performa</td><td>I warde I warde</td><td>Budgets Variances Reports Cons System Management Spannal Spann</td></td>	NorgUnits Variances Reports	I orgUnits Manage OrgUnits age OrgUnits age OrgUnits orgUnit Rollup OrgUnit Rollup OrgUnit Search Show Sample Acct Descriptions Save OrgUnits Save OrgUnits OrgUnit Rollup OrgUnit Rollup OrgUnit Search Show Sample Acct Descriptions Save OrgUnits Save OrgUnits Print Description RP OrgUnit 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warde I warde	Budgets Variances Reports Cons System Management Spannal Spann



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Note: You have the ability to turn on the following 3 columns: 1. IsBudgeted 2. InReports 3. FixedCalc

🖉 Dy	mamicBudg	gets - dynbu	idsm - PHUBERI \SQI	LEXPRESS - DynamicB	udgets										- u	×
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om	panyDB	ORGUNI /	Description	ERP OrgUnit Descrip	IsBudgeted	InReports	FixedCalc		Tag1	Tag2	Tag3	Tag4	Tag5	Tag6	Tag7	
	A	A	A					E.	A	A	A	A	A	A	A	
Þ	d123	100	Administration	Administration				I OT-SET								
	d123	200	Accounting	Accounting				I OT-SET								
	d123	300	Sales	Sales				I OT-SET								
	d123	400	Service/Installatio	Service/Installation				I OT-SET								
	d123	500	Consulting/Traini	Consulting/Training				OT-SET								
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Click in the box to the right of IsBudgeted. This turns on these accounts for budgeting purposes.

🍠 Dy	namicBud	gets - dynbu	idsm - PHUBERI \SQI	LEXPRESS - DynamicBi	udgets										-	u x
F	ile 💲	Budgets -	Variances	Reports							🔦 Tools 💈	System Management	S Allocations	🏐 Payroll	as Users N	lanagement
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Comp	anyDB	ORGUNI /	Description	ERP OrgUnit Descrip	IsBudgeted	🗹 I Reports	FixedCalc	ORG_ROLLUP	Tag1	Tag2	Tag3	Tag4	Tag5	Tag6	Tag7	
	A	A	A						A	A	A		A	A	A	
2	d123	100	Administration	Administration				NOT-SET								
I	d123	200	Accounting	Accounting				NOT-SET								
1	d123	300	Sales	Sales				NOT-SET								
1	d123	400	Service/Installatio	Service/Installation				NOT-SET								
1	d123	500	Consulting/Traini	Consulting/Training				NOT-SET								
1	d123	600	Purchasing/Recei	Purchasing/Receivin				NOT-SET								

Click in the box to the right of InReporting. This turns on these accounts for reporting purposes.

🍠 Dy	namicBud	gets - dynbu	idsm - PHUBERI (SQI	LEXPRESS - DynamicBu	idgets										-	u x
F	ile 💲	Budgets 🚽	Variances	Reports							🔍 Tools 🦸	System Management	\$ Allocations	🏐 Payroll	Sers Users	Managemen
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Comp	anyDB	ORGUNI /	Description	ERP OrgUnit Descrip	IsBudgeted	InReports	ixedCalc	ORG_ROLLUP	Tag1	Tag2	Tag3	Tag4	Tag5	Tag6	Tag	7
	A	A	A	A				A	A	A	A	A	A	A	A	
2	d123	100	Administration	Administration				NOT-SET								
I	d123	200	Accounting	Accounting				NOT-SET								
I	d123	300	Sales	Sales				NOT-SET								
I	d123	400	Service/Installatio	Service/Installation				NOT-SET								
J	d123	500	Consulting/Traini	Consulting/Training				NOT-SET								
J	d123	600	Purchasing/Recei	Purchasing/Receivin				NOT-SET								



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Click in the box to the right of FixedCalc. This turns on the ability to use the excel-like or Fixed Calculation entry form in the modules.

🖉 Uy	namicBud	gets - dynbu	idsm - PHUBERI \SQL	EXPRESS - DynamicBu	udgets										-	x L
e F	ile 💲	Budgets -	Variances	Reports							🔦 Tools 🎉	System Management	\$ Allocations	💲 Payroll	ag Users M	anagement
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Comp	DanyDB	ORGUNI /	Description	ERP OrgUnit Descrip	IsBudgeted	✓ InReports	FixedCalc	RG_ROLLUP	Tag1	Tag2	Tag3	Tag4	Tag5	Tag6	Tag7	
	A	A		A				A	A	A		A	A	A	A	
2	d123	100	Administration	Administration				NOT-SET								
I	d123	200	Accounting	Accounting				NOT-SET								
I	d123	300	Sales	Sales				NOT-SET								
I	d123	400	Service/Installatio	Service/Installation				NOT-SET								
I	d123	500	Consulting/Traini	Consulting/Training				NOT-SET								
J	d123	600	Purchasing/Recei	Purchasing/Receivin				NOT-SET								



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Note: The ORG_ROLLUP column is used for rollup values. Many of our screens have dropdown choices for department rollups.

🍠 Dy	namicBud	gets - dynbu	idsm - PHUBERI \SQL	LEXPRESS - DynamicBi	udgets										– u	×
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Ad	d OrgUnits	5 N	1anage OrgUnits 🔿	×												
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	Print 💽	Export to Ex	cel 🛛 📆 Print to PDF	F AutoSize Colum	nns				_						Rows: 6 A	- A+
Comp	anyDB	ORGUNI /	Description	ERP OrgUnit Descrip	IsBudgeted	InReports	FixedCalc	ORG_ROLLUP	1 ag1	Tag2	Tag3	Tag4	Tag5	Tag6	Tag7	
1	A	A		A					101	A			A	A	A	
2	d123	100	Administration	Administration				NOT-SET								
ļ	d123	200	Accounting	Accounting				NOT-SET								
ļ	d123	300	Sales	Sales				NOT-SET								
I	d123	400	Service/Installatio	Service/Installation				NOT-SET							-	
J	d123	500	Consulting/Traini	Consulting/Training				NOT-SET								
0	d123	600	Purchasing/Recei	Purchasing/Receivin				NOT-SET		1						

Note: You can type in departments for each account. In this example, we used three departments-G&A, Sales, & Ops. Most departments are assigned by numbers in ranges. Please verify if the descriptions and ranges are accurate for assignment purposes.

🖉 Dyi	namicBud	gets - dynbu	ıdsm - PHUBERI \SQL	LEXPRESS - DynamicBi	udgets										-	u x
🔶 F	ile 💲	Budgets -	Variances 📊	Reports							🔦 Tools 🎉	System Management	\$ Allocations	💲 Payroll	ag Users N	lanagement
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Mar	nage Orgl	Inits														0 • •
Fab	panyDB* prikam Save Org	gUnits	OrgUnit Rollup	OrgUnit Show Compan	y Tags 🖨	Sea	rch [Show Sample Acct D	escriptions							
ä	Print 🛐	Export to E	xcel 🛛 📆 Print to PDP	F 🔜 AutoSize Colum	ins				_						Rows:	6 A- A +
Comp	anyDB	ORGUNI /	Description	ERP OrgUnit Descrip	IsBudgeted	☑ InReports	FixedCalc [ORG_ROLLUP	19g1	Tag2	Tag3	Tag4	Tag5	Tag6	Tag7	
	A	A	A	A				A		A	A	A	A	A	A	
0	d123	100	Administration	Administration				G&A								
	d123	200	Accounting	Accounting				G&A								
	d123	300	Sales	Sales				Sales								
	d123	400	Service/Installatio	Service/Installation				Ops								
2	d123	500	Consulting/Traini	Consulting/Training				Ops								
	d123	600	Purchasing/Recei	Purchasing/Receivin				G&A								

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Note: We have other reporting tag columns available if you have other reasons to group account numbers or departments into different areas. Custom reports can be built using these tags or labels.

🔉 Uy	namicBud	gets - dynbu	idsm - PHUBERI \SQI	EXPRESS - DynamicBu	udgets										- u	×
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Mar	nage Orgl	Inits													0	-
Fab	brikam	~		OrgUnit		5	Search	Show Sample Acct	Descriptions							
		Export to Ex		Show Compan					_						Pows: 6	A- A4
Comp	panyDB	ORGUNI /	Description	ERP OrgUnit Descrip	IsBudgeted	InReports	FixedCalc	ORG_ROLLUP	Tag1	Tag2	Tag3	Tag4	Tag5	Tag6	т 97	
	A	A						A	A	A	A	A	A	A	2	
	d123	100	Administration	Administration				G&A								
	d123	200	Accounting	Accounting				G&A								
	d123	300	Sales	Sales				Sales								
	d123	400	Service/Installatio	Service/Installation				Ops								
۲	d123	500	Consulting/Traini	Consulting/Training				Ops								
	d123	600	Purchasing/Recei	Purchasing/Receivin				G&A				1				



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Note: An example used for Tag1 is grouping the ORG_ROLLUP departments by Region.

🍠 Dyi	namicBud	gets - dynbu	idsm - PHUBERI (SQI	LEXPRESS - DynamicBu	idgets										- 1	u x
😽 F	ile 💲	Budgets	Variances	Reports							🔦 Tools 🦸	System Management	\$ Allocations	🏐 Payroll	🏭 Users M	lanagement
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Mar	nage OrgU	nits													(0 ▼ ×
Fab	panyDB* prikam Save Org	√ gUnits	OrgUnit Rollup	OrgUnit Show Compan	y Tags 📦	Sear	dh	Show Sample Acct	Descriptions							
	Print 💽	Export to Ex	cel 🛛 📆 Print to PDI	F 🛄 AutoSize Colum	ins					_					Rows:	6 A- A +
Comp	anyDB	ORGUNI /	Description	ERP OrgUnit Descrip	IsBudgeted	InReports	FixedCalc	ORG_ROLLUP	Tag1	ag2	Tag3	Tag4	Tag5	Tag6	Tag7	
	A	A	A					A	A		A	A		A	A	
	d123	100	Administration	Administration				G&A	Region1							
	d123	200	Accounting	Accounting				G&A	Region1							
	d123	300	Sales	Sales				Sales	Region1							
	d123	400	Service/Installatio	Service/Installation				Ops	Region2							
	d123	500	Consulting/Traini	Consulting/Training				Ops	Region2							
►	d123	600	Purchasing/Recei	Purchasing/Receivin				G&A	Region2							

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Note: An example used for Tag2 is grouping the ORG_ROLLUP departments by region AND by Managers.

ع Dy	namicBudg	gets - dynbu	idsm - PHUBERI \SQL	EXPRESS - DynamicBu	udgets										- u	х
🔶 F	ile 💲	Budgets 🚽	Variances	Reports							🔦 Tools 🎉	System Management	\$ Allocations	🏐 Payroll	as Users Man	agement
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Fal	brikam	v JUnits	OrgUnit Rollup	OrgUnit Show Compan	ny Tags 🛋	Sea	rch 🗌	Show Sample Acct	Descriptions							
	Print 💽	Export to Ex	cel 📆 Print to PDF	AutoSize Colum	nns						_				Rows: 6	A- A+
omp	banyDB	ORGUNI /	Description	ERP OrgUnit Descrip	IsBudgeted	🗹 InReports 🛛	FixedCalc	ORG_ROLLUP	Tag1	Tag2	ag3	Tag4	Tag5	Tag6	Tag7	
	A		A	A				A	A	A		A	A	A	A	
	d123	100	Administration	Administration				G&A	Region1	Nancy						
	d123	200	Accounting	Accounting				G&A	Region1	Nancy						
	d123	300	Sales	Sales				Sales	Region1	Nancy						
	d123	400	Service/Installatio	Service/Installation				Ops	Region2	Nancy						
	d123	500	Consulting/Traini	Consulting/Training				Ops	Region2	Nancy						
10	d123	600	Purchasing/Recei	Purchasing/Receivin				G&A	Region2	Frank			1	1	1	

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Note: You can select a company or ALL companies from the dropdown menu. If you select ALL, all account numbers for all companies will appear on the screen to perform the previous tasks simultaneously.

y Dy	namicBud	gets - dynbu	idsm - PHUBERI \SQI	LEXPRESS - DynamicBi	idgets										- u	х
e F	ile 💲	Budgets	Variances	Reports							🔦 Tools 🤅	System Management	\$ Allocations	🏐 Payroll	🏭 Users Man	agement
Ad	d OrgUnits	; N	1anage OrgUnits	×												
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	Print 💽	Export to Ex	cel 🛛 📆 Print to PDI	F 📺 AutoSize Colum	ins										Rows: 6	A- A+
Comp	anyDB	ORGUNI /	Description	ERP OrgUnit Descrip	IsBudgeted	InReports] FixedCalc		Tag1	Tag2	Tag3	Tag4	Tag5	Tag6	Tag7	
	A	A	A	A				A	A	A	A		A	A	A	
•	d123	100	Administration	Administration				G&A	Region1	Nancy						
	d123	200	Accounting	Accounting				G&A	Region1	Nancy						
	d123	300	Sales	Sales				Sales	Region1	Nancy						
	d123	400	Service/Installatio	Service/Installation				Ops	Region2	Nancy						
	d123	500	Consulting/Traini	Consulting/Training				Ops	Region2	Nancy						
	d123	600	Purchasing/Recei	Purchasing/Receivin				G&A	Region2	Frank						



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Now Click on Save OrgUnits. A message will appear that reads Saved OrgUnits Successfully

🖉 Dyi	namicBud	jets - dynbu	dsm - PHUBEKI /SQI	EXPRESS - DynamicBu	udgets										- u	×
F	ile 💲	Budgets	Variances	Reports							🔦 Tools 🧃	System Management	\$ Allocations	🏐 Payroll	🏭 Users Man	agement
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Comp	anyDB	ORGUNI /	Description	ERP OrgUnit Descrip	IsBudgeted	InReports	FixedCalc	ORG_ROLLUP	Tag1	Tag2	Tag3	Tag4	Tag5	Tag6	Tag7	
	A	A	A	A					A	A	A	A	A	A	A	
•	d123	100	Administration	Administration				G&A	Region1	Nancy						
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	d123	300	Sales	Sales				Sales	Region1	Nancy						
	d123	400	Service/Installatio	Service/Installation				Ops	Region2	Nancy						
	d123	500	Consulting/Traini	Consulting/Training				Ops	Region2	Nancy						
	d123	600	Purchasing/Recei	Purchasing/Receivin				G&A	Region2	Frank						

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Click on the X to close.

🍠 Dy	namicBudg	gets - dynbu	idsm - PHUBERI (SQI	LEXPRESS - DynamicBu	idgets										-	U X
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Ad	d OrgUnits	N	/lanage OrgUnits	×												
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	Print 💽	Export to E	xcel 🛛 📆 Print to PDI	F 📺 AutoSize Colum	ins										Row	s:6 A- A+
Comp	anyDB	ORGUNI /	Description	ERP OrgUnit Descrip	IsBudgeted	InReports	FixedCalc	ORG_ROLLUP	Tag1	Tag2	Tag3	Tag4	Tag5	Tag6	Tag	7
	A	A	A					A	A	A		A	A	A	A	
•	d123	100	Administration	Administration				G&A	Region1	Nancy						
	d123	200	Accounting	Accounting				G&A	Region1	Nancy						
	d123	300	Sales	Sales				Sales	Region1	Nancy						
	d123	400	Service/Installatio	Service/Installation				Ops	Region2	Nancy						
	d123	500	Consulting/Traini	Consulting/Training				Ops	Region2	Nancy						
	d123	600	Purchasing/Recei	Purchasing/Receivin				G&A	Region2	Frank						



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That's It. You're Done.



That's It. You're Done.