

<div data-bbox="124 309 161 360"></div> <div data-bbox="202 304 603 365"><p>Dynamic Budgets User Guide for Manage OrgUnits</p></div> <div data-bbox="655 275 699 324"><p>1</p></div>	<div data-bbox="774 331 1425 436"></div> <div data-bbox="790 495 1428 790"><p>User Guide for Manage OrgUnits</p></div>
<div data-bbox="119 909 165 954"></div> <div data-bbox="202 898 558 960"><p>Add OrgUnits, Manage OrgUnits: Module Purpose</p></div> <div data-bbox="202 994 603 1252"><p>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.</p></div> <div data-bbox="655 869 699 918"><p>2</p></div>	<div data-bbox="1027 934 1489 1039"></div> <div data-bbox="1088 1153 1513 1209"><p>Add OrgUnits, Manag</p></div> <div data-bbox="777 1323 1517 1646"><p><u>Purpose:</u> During Client Configuration, which are typically called departments need to be added to Dynamic Budgets for budgeting and reporting purposes. Manage OrgUnits tab.</p></div>

Click on **System Management**.

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Click on **OrgUnits, Manage OrgUnits**.

4

Click on **Search**.

5

Note: If there are **descriptions in the ERP OrgUnit Description column**, we can copy those descriptions to the Description column.

Please verify if the descriptions are accurate.

6



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

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Print Export to Excel Print to PDF AutoSize Columns

CompanyDB	ORGUNIT	Description	ERP OrgUnit Descrip	IsBu
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
d123	100	Administration	Administration	
d123	200	Accounting	Accounting	
d123	300	Sales	Sales	
d123	400	Service/Installatio	Service/Installation	
d123	500	Consulting/Traini	Consulting/Training	
d123	600	Purchasing/Recei	Purchasing/Receivin	



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

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Print Export to Excel Print to PDF AutoSize Columns

CompanyDB	ORGUNIT	Description	ERP OrgUnit Descrip	IsBu
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
d123	100	Administration	Administration	
d123	200	Accounting	Accounting	
d123	300	Sales	Sales	
d123	400	Service/Installatio	Service/Installation	
d123	500	Consulting/Traini	Consulting/Training	
d123	600	Purchasing/Recei	Purchasing/Receivin	



Note: You have the ability to turn on the following 3 columns:

1. IsBudgeted
2. InReports
3. FixedCalc

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AutoSize Columns

Descrip	IsBudgeted	<input type="checkbox"/> InReports	<input type="checkbox"/> FixedCalc	<input type="checkbox"/> ORG_ROL
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
on	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	OT-SET
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	OT-SET
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	OT-SET
allation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	OT-SET
Training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	OT-SET
Receivin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	OT-SET

Click in the box to the right of IsBudgeted.

This turns on these accounts for budgeting purposes.

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Click in the box to the right of InReporting.

This turns on these accounts for reporting purposes.

11

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.

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

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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.

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	<input checked="" type="checkbox"/> FixedCalc	<input checked="" type="checkbox"/> ORG_ROLLUP	Tag1	Tag2
	<input type="checkbox"/>	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	G&A		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	G&A		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sales		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ops		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ops		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	G&A		



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.**

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Tag1	Tag2	Tag3	Tag4



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

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<input checked="" type="checkbox"/> ORG_ROLLUP	Tag1	Tag2	Tag3
G&A	Region1		
G&A	Region1		
Sales	Region1		
Ops	Region2		
Ops	Region2		
G&A	Region2		

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

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P	Tag1	Tag2	Tag3	Tag4
	Region1	Nancy		
	Region1	Nancy		
	Region1	Nancy		
	Region2	Nancy		
	Region2	Nancy		
	Region2	Frank		

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.

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Add OrgUnits

Manage OrgUnits X

Manage OrgUnits

CompanyDB*

Fabrikam

<all>

Fabrikam

OrgUnit Rollup

OrgUnit

Save OrgUnits X Delete Selected Show Company Tag

Print Export to Excel Print to PDF AutoSize Columns

CompanyDB ORGUNI / Description ERP OrgUnit Descrip IsBu

Now Click on Save OrgUnits.

A message will appear that reads **Saved OrgUnits Successfully**.

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Manage OrgUnits

CompanyDB*

Fabrikam

OrgUnit Rollup

OrgUnit

Save OrgUnits

X Delete Selected

Show Company Tag

Print Export to Excel Print to PDF AutoSize Columns

CompanyDB ORGUNI / Description ERP OrgUnit Descrip IsBu

Click on the X to close.

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Management

Allocations

Payroll

Users Management

?

X



That's It. You're Done.

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DYNAMIC[™]
BUDGETS



That's It. You're Done.