

Dynamic Budgets User Guide for Manage Servers





System Management, Manage Servers: Module PurposeTo build a link to the SQL server(s) where the ERP system(s) are located. Dynamic Budgets (DB) can be installed in a single SQL instance or distributed across multiple linked SQL servers.



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Click System Management.



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Click Manage Servers.





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Note: The system automatically defaults to the Dynamic Budgets Linked Servers tab.

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Click in cell *Linked Server Database Server to update "local" to the name of the SQL Server \Instance. Note: In Single server installs, the Dynamic Budgets database is typically colocated on the same SQL server as the production instance of the ERP.

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Note: The Linked Server Database Server name is the 3rd breadcrumb in the app header in the upper left corner. Hint: program - userid - SERVER - database

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Now Type the name of the SQL Server\Instance. Note: In this example, you would type PHUBERT\SQLEXPRESS. It is the 3rd breadcrumb in the app header in the upper left corner.

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Click in the cell named System Database: Typically, the System Database is named DYNAMICS unless the client chose a different name. If the client chose another name, type the name in the cell.

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Now Choose an ERP from the dropdown menu: Dynamics GP or Dynamics NAV. Note: In this example, we will choose Dynamics GP.

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Click Test Connection.

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If successful, a message will appear that reads Connection Successful. If unsuccessful, a message will appear that reads Connection Failed.

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The Configured SQL Linked Servers tab lists all of the SQL Servers installed.

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Now Click on the X to close.

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That's It. You're Done.



That's It. You're Done.