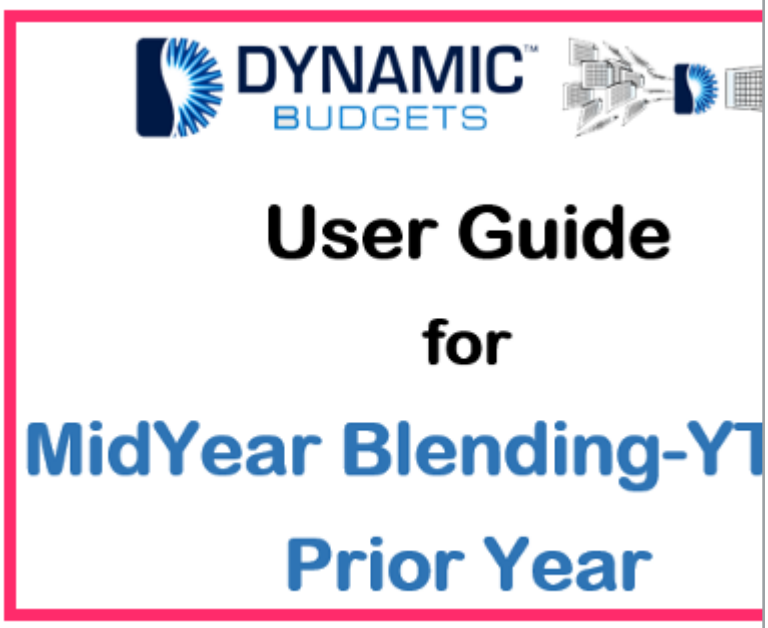
1

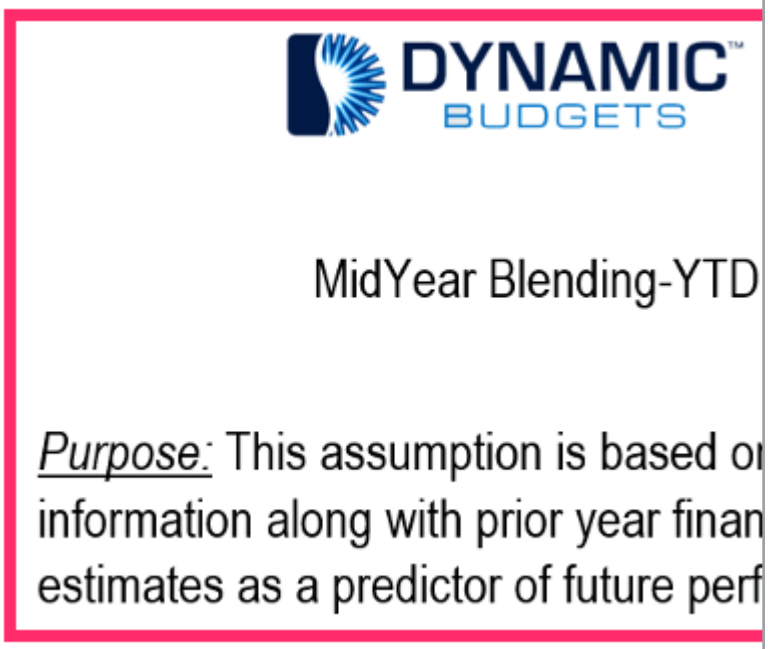
Dynamic Budgets User Guide for MidYear Blending-YTD & Prior Year

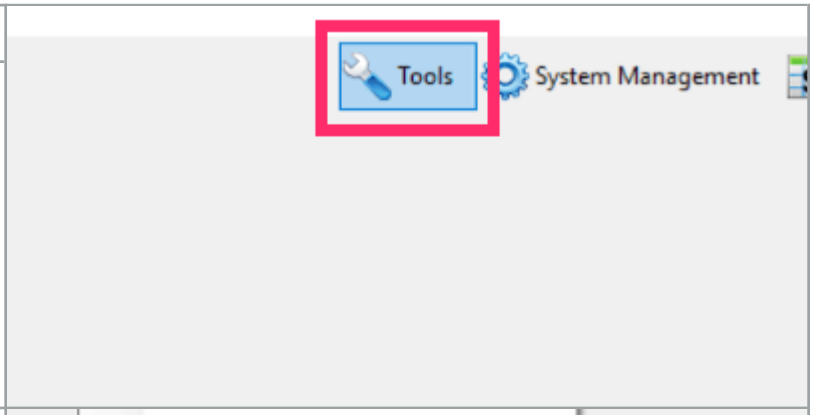
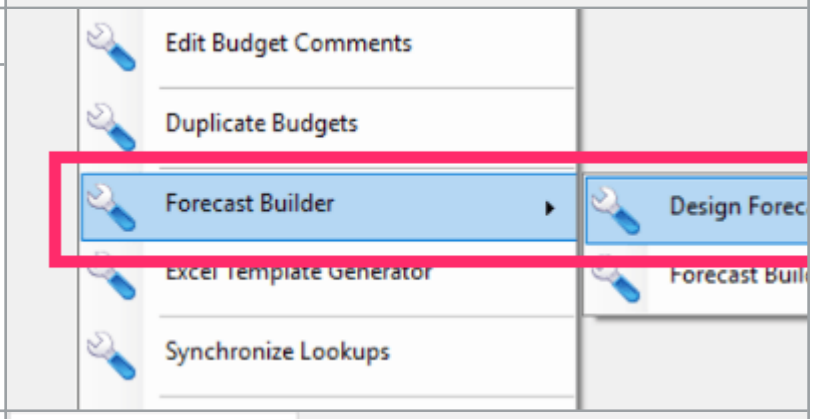
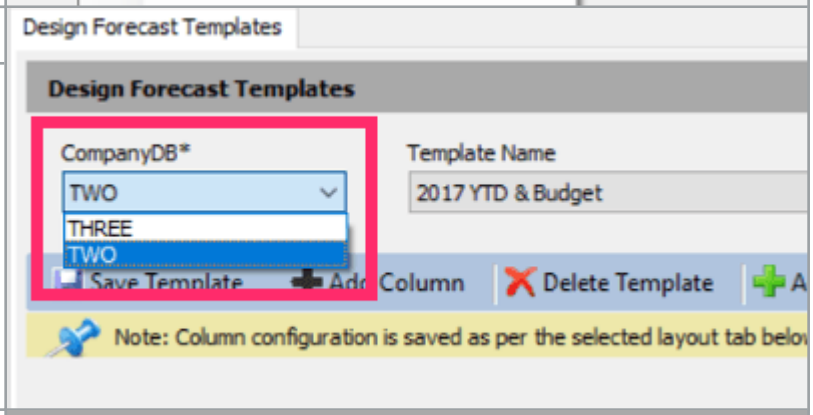
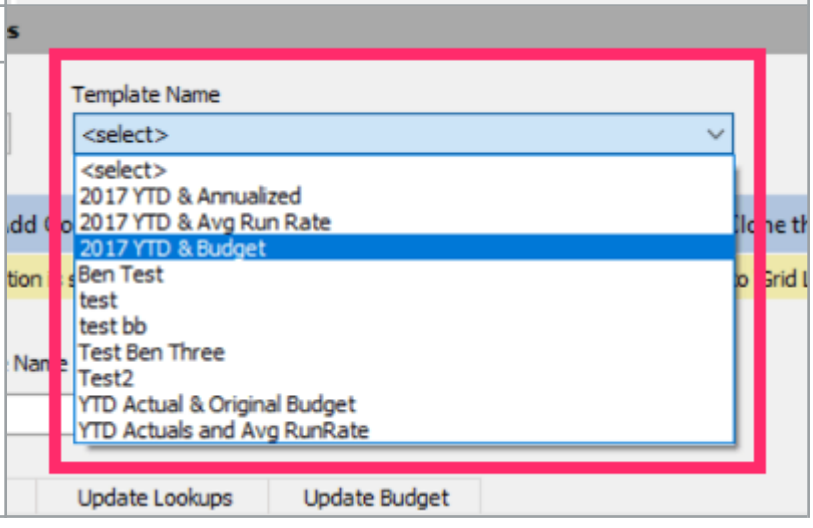


2

Midyear Blending-YTD & Prior Year: Module Purpose

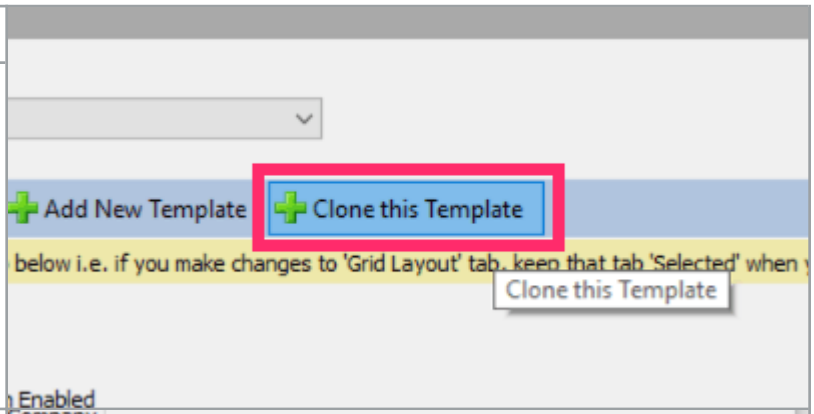
This assumption is based on current financial information along with prior year financial information to create estimates as a predictor of future performance.



Click on Tools.	3 
Click on Forecast Builder, Design Forecast Templates.	4 
Click on the Company DB dropdown menu. Select a company. In this example, we will select TWO.	5 
Click on the Template Name dropdown menu. Select a template. In the example, we will select 2017 YTD & Budget.	6 

7

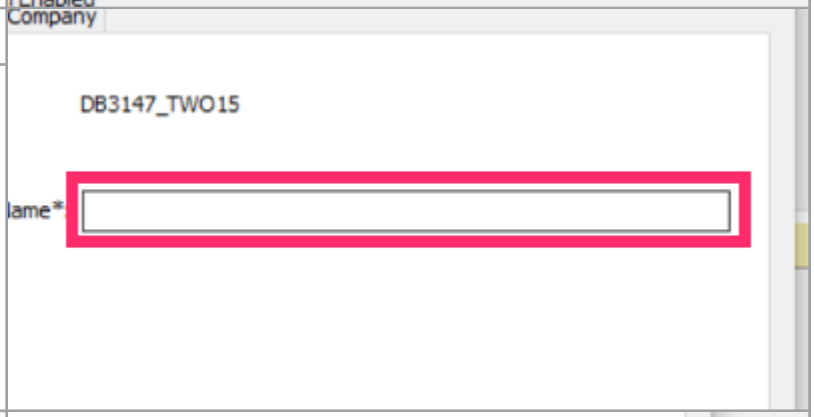
Click on Clone this Template.



8

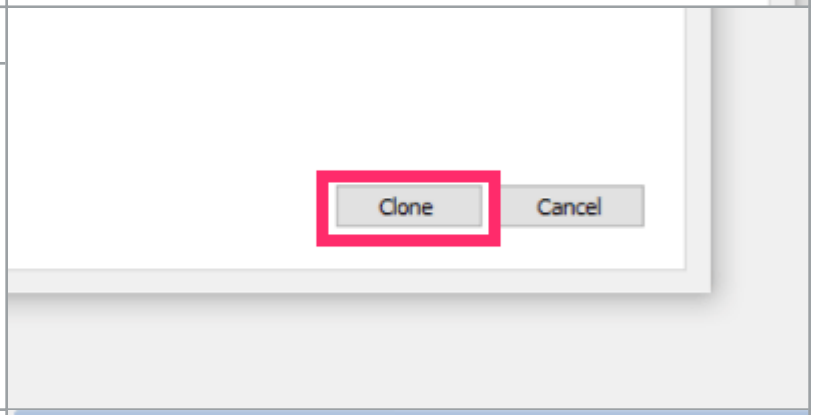
Click in the Forecast Template Name box. Enter the new name of the template.

In this example, we will type 2017 YTD & 2016.



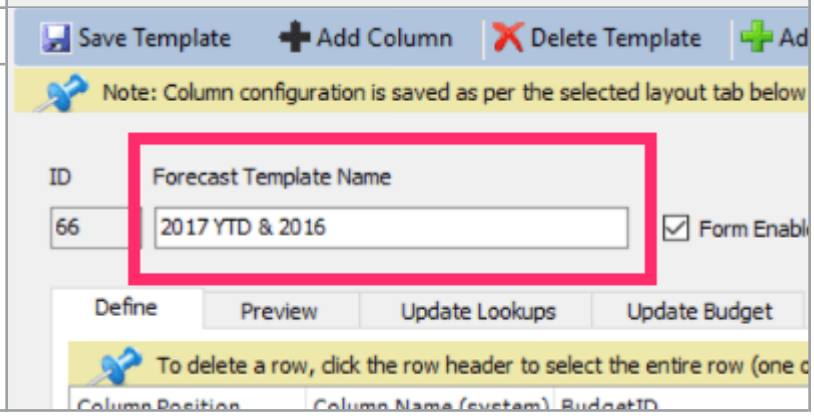
9

Click on Clone.



10

Note: Now you see the Forecast Template name has changed.

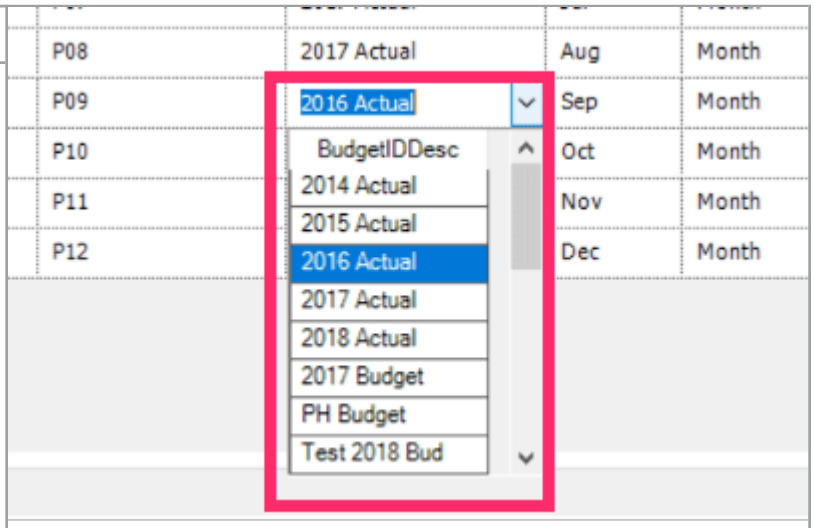


In this example, the books are closed through August 2017; therefore we will use the 2017 actual as the budgetid through August 2017.

Now, copy the 2016 Actual budgetid to the remaining months in this fiscal period.

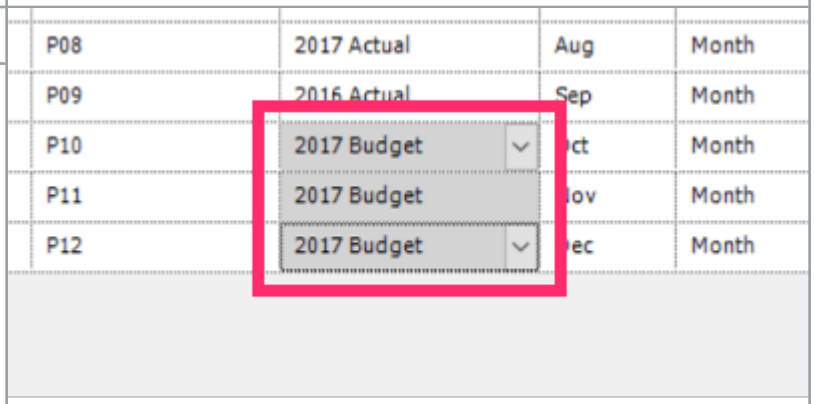
Use Shortcut:
Control C, to copy

11



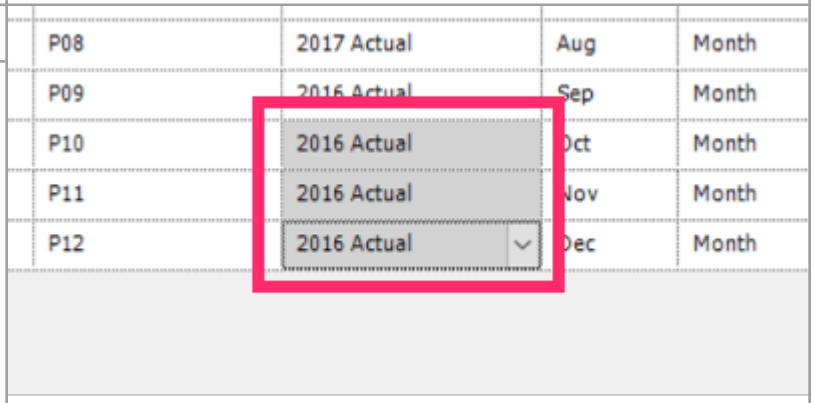
Click in the budgetid cell for October, shift, down arrow to capture through December.

12



Use shortcut:
Control V, to paste

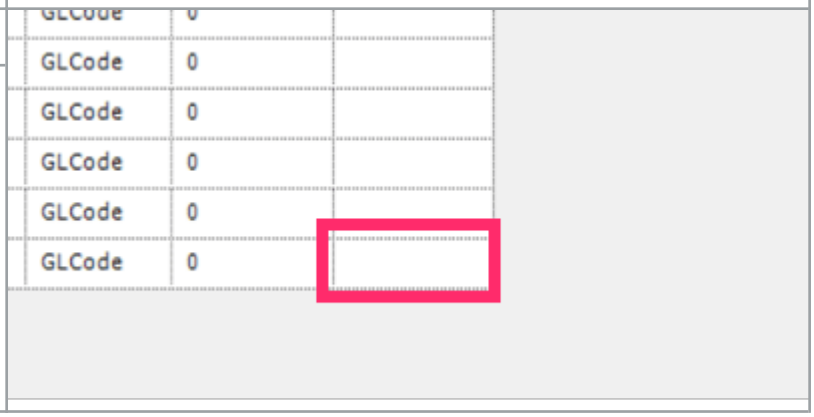
13

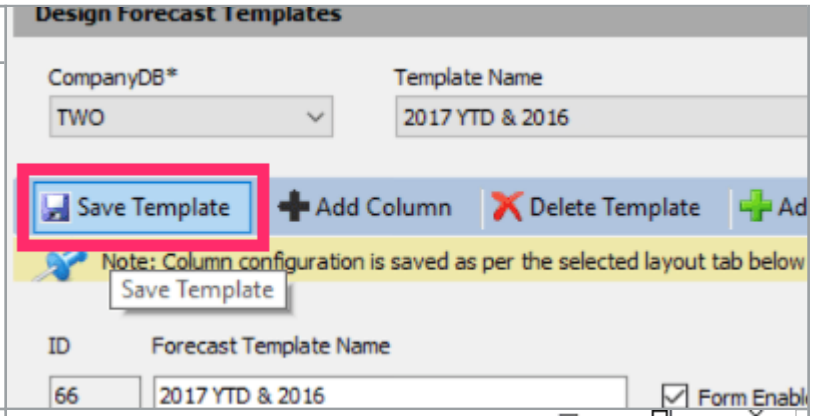
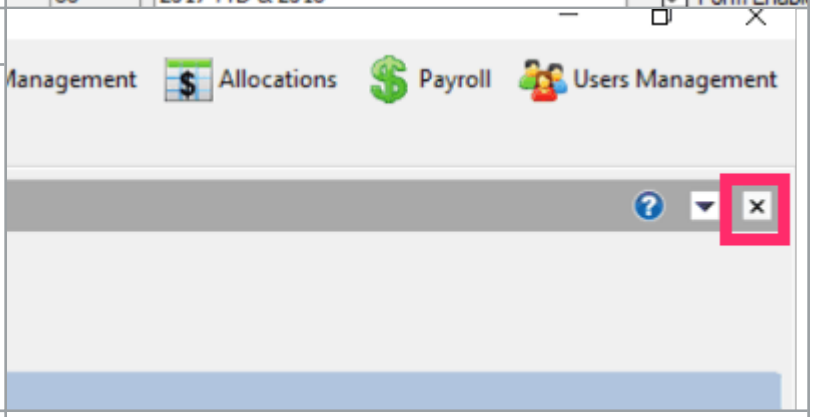


Note: If you are on a grey cell, the change is not final until you move to a white cell.

Now Click in a white cell.

14



Click on Save Template.	15	
Click on the X to close this screen.	16	
That's It. You're Done.	17	