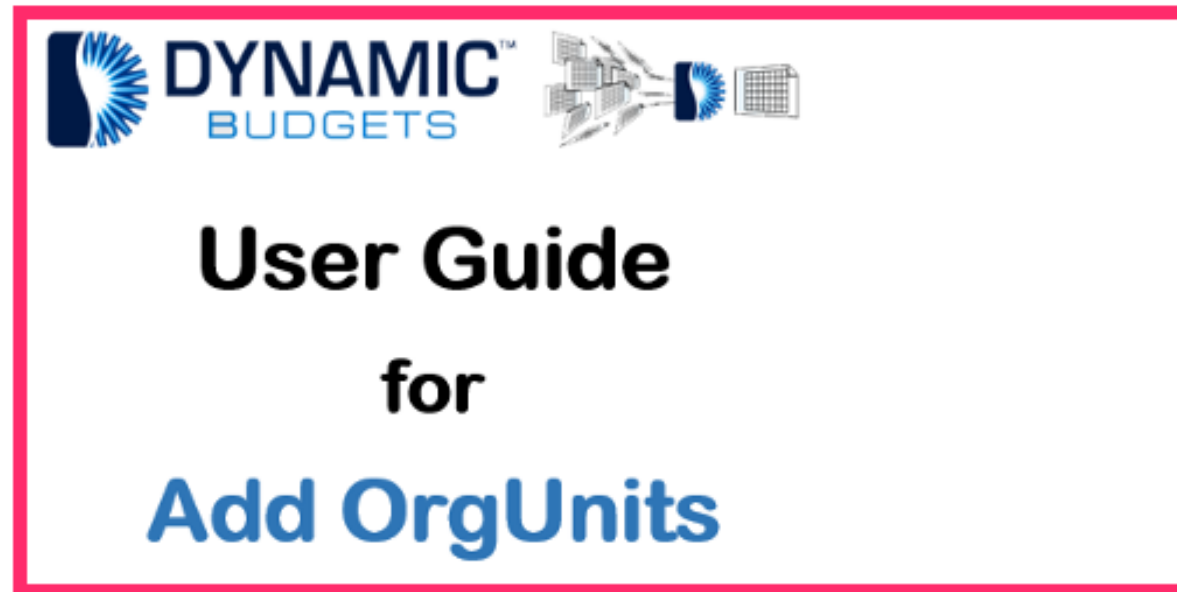




Dynamic Budgets User Guide for Add OrgUnits



- 1 Add 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.

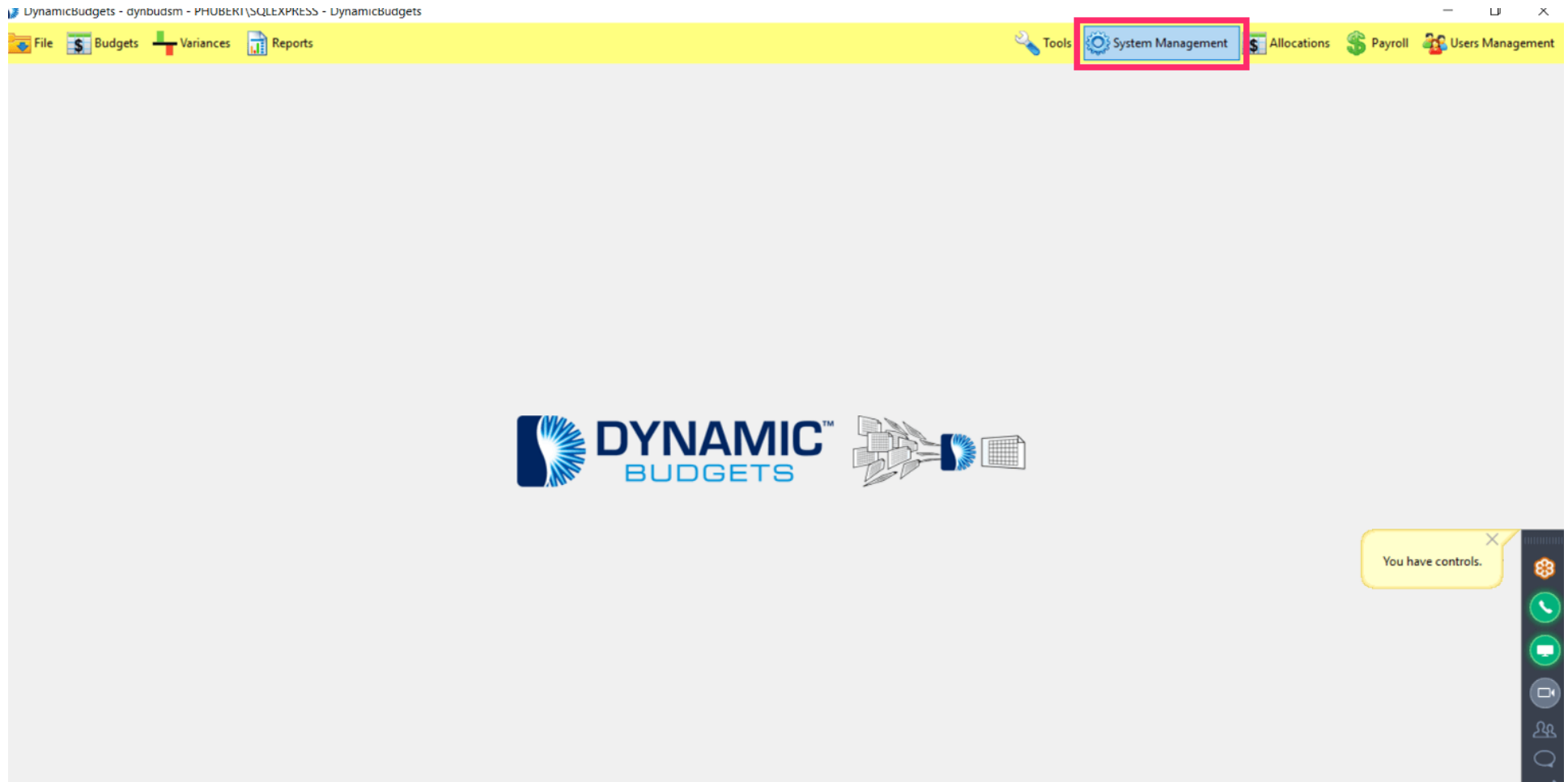


Add OrgUnits|

Purpose: During Client Configuration, the client's OrgUnits, which are typically called departments in most organizations, need to be added to Dynamic Budgets to make them available for budgeting and reporting purposes.

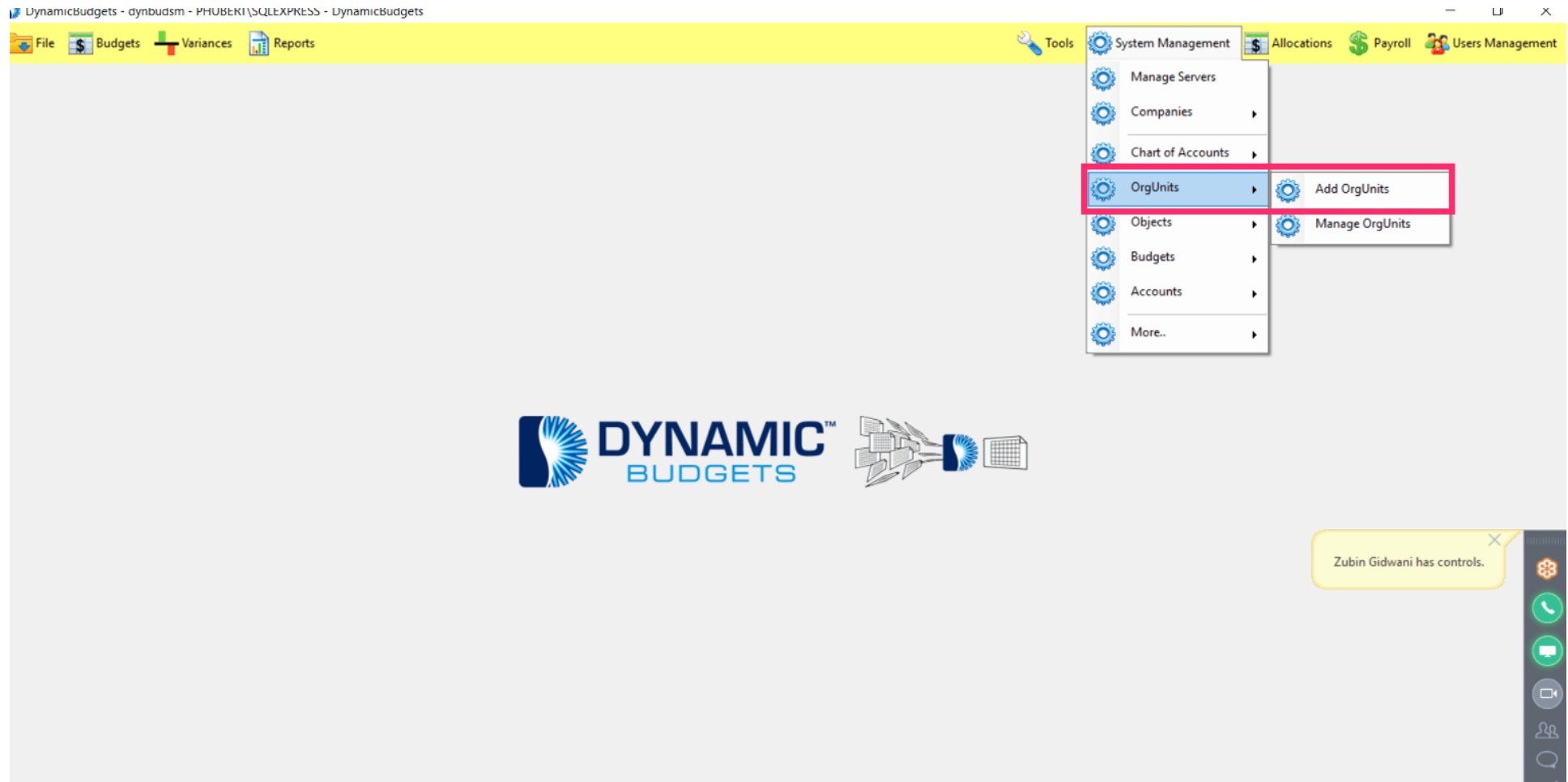


Click on **System Management**.





Click on **OrgUnits**, **Add OrgUnits**.



📌 Choose a company or companies from the Available Companies list. Click on it to highlight it.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Add OrgUnits

Available Companies Selected Companies Available OrgUnits Selected OrgUnits

Fabrikam

Count: Total: 0 License limit: 100

Save

Note: If selecting 1 company from the Available Companies list, click on the company name, then click on the single right arrow. If selecting ALL companies from the list, click on the double right arrow.

The screenshot shows the 'Add OrgUnits' interface. The 'Available Companies' list contains 'Fabrikam'. The 'Selected Companies' list is empty. The 'Available OrgUnits' list is empty. The 'Selected OrgUnits' list is empty. Below the 'Selected OrgUnits' list, the following information is displayed: Count: Total: 0 License limit: 100. A 'Save' button is located at the bottom right of the main area.

Note: If selecting ALL Available OrgUnits from the list, then click on the double right arrow.

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Add OrgUnits

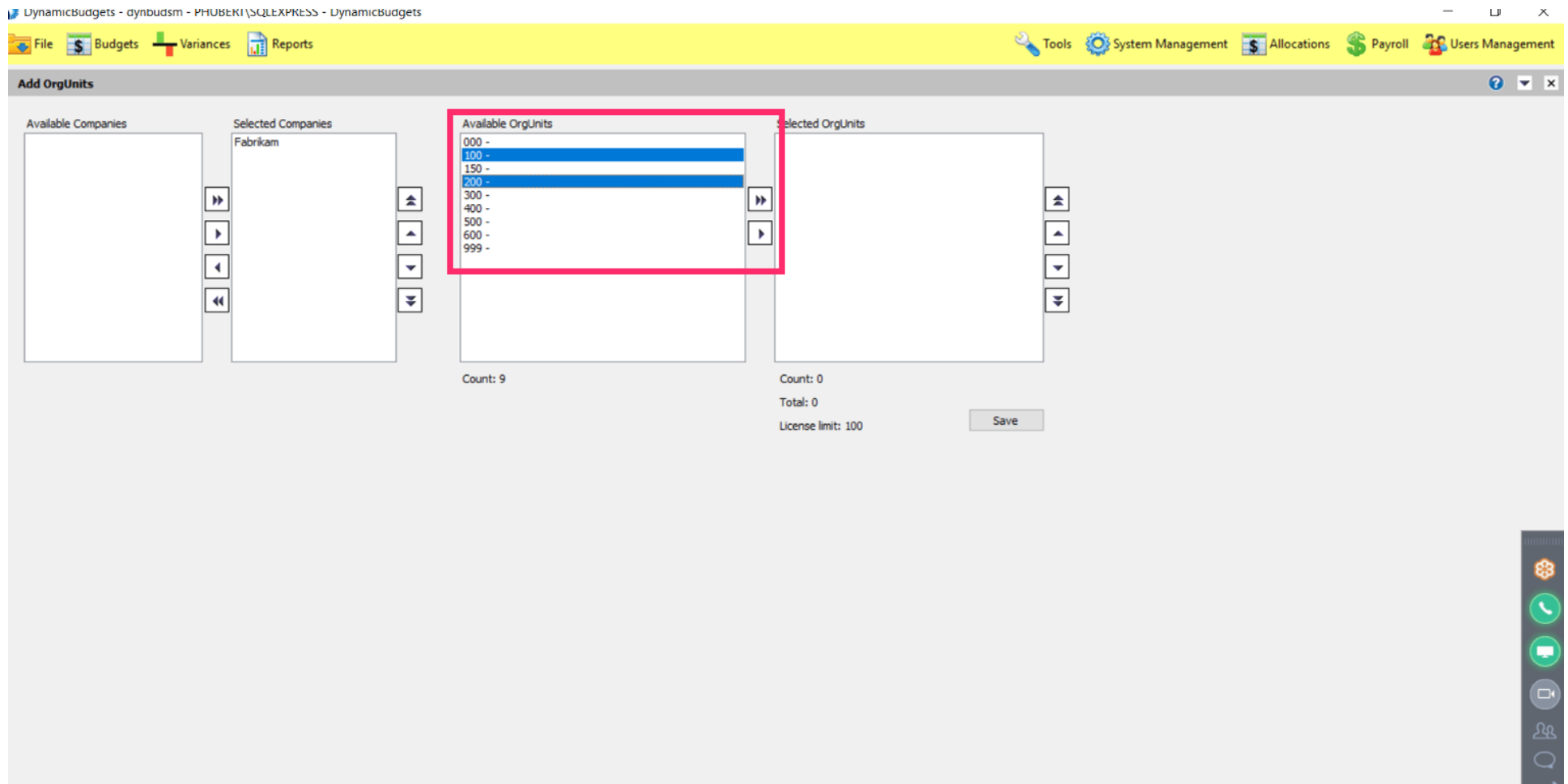
Available Companies Selected Companies Available OrgUnits Selected OrgUnits

Count: 9 Count: 0 Total: 0 License limit: 100 Save

📌 If selecting 1 OrgUnit from the Available OrgUnits list, highlight it. Then click on the single-right arrow to make the selection.

The screenshot shows the 'Add OrgUnits' application window. The interface includes a menu bar with 'File', 'Budgets', 'Variances', and 'Reports'. On the right, there are icons for 'Tools', 'System Management', 'Allocations', 'Payroll', and 'Users Management'. The main area is divided into four panels: 'Available Companies' (empty), 'Selected Companies' (containing 'Fabrikam'), 'Available OrgUnits' (a list with '200 -' highlighted and a red box around it), and 'Selected OrgUnits' (empty). Below the 'Available OrgUnits' list, it says 'Count: 9'. Below the 'Selected OrgUnits' list, it says 'Count: 0', 'Total: 0', and 'License limit: 100'. A 'Save' button is located at the bottom right of the main area. A vertical toolbar with various icons is visible on the far right edge of the window.

 If selecting some of the Available OrgUnits, use the control key and highlight all of the OrgUnits you want. Then click on the single-right arrow.



📌 If selecting a range of companies from the Available OrgUnits list, use the shift key to select all of the OrgUnits you want. Then click on the single-right arrow.

The screenshot shows the 'Add OrgUnits' window in a software application. The window has a yellow title bar and a menu bar with 'File', 'Budgets', 'Variances', and 'Reports'. On the right side of the menu bar, there are icons for 'Tools', 'System Management', 'Allocations', 'Payroll', and 'Users Management'. The main area of the window is divided into four panels: 'Available Companies', 'Selected Companies', 'Available OrgUnits', and 'Selected OrgUnits'. The 'Available OrgUnits' panel is highlighted with a red box and contains a list of OrgUnits from 000 - to 999 -. The 'Selected OrgUnits' panel is empty. Below the 'Available OrgUnits' panel, it says 'Count: 9'. Below the 'Selected OrgUnits' panel, it says 'Count: 0', 'Total: 0', and 'License limit: 100'. There is a 'Save' button at the bottom right of the window. A vertical toolbar is visible on the right side of the window.



Now all of the client's OrgUnits have been selected. Please verify the license limit is correct. Note: If the number of licenses is incorrect, contact Dynamic Budgets support to re-issue the license for the correct number.

Click on **Save**. Then a message will appear that reads **Changes Saved Successfully**.

The screenshot shows the 'Add OrgUnits' application window. The window title is 'DynamicBudgets - dynbudsm - PHUBERT\SQLEXPRESS - DynamicBudgets'. The menu bar includes 'File', 'Budgets', 'Variances', and 'Reports'. The main interface is divided into four panes: 'Available Companies', 'Selected Companies', 'Available OrgUnits', and 'Selected OrgUnits'. The 'Selected Companies' pane contains 'Fabrikam'. The 'Available OrgUnits' pane contains '000 -', '150 -', and '999 -'. The 'Selected OrgUnits' pane contains '100 -', '200 -', '300 -', '400 -', '500 -', and '600 -'. Below the 'Selected OrgUnits' pane, the following statistics are displayed: 'Count: 6', 'Total: 6', and 'License limit: 100'. A 'Save' button is highlighted with a red box. A notification bubble in the bottom right corner reads 'Zubin Gidwani has controls.' The system tray on the right includes icons for help, search, and other functions.



Click on the X to close.



That's It. You're Done.



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That's It. You're Done.