

Basic Budget Entry is used for entering and viewing budgets.  
Basic Budget Entry has two tabs; Dashboard and Account Details.

Other entry and viewing screen options are the [Budgeting Dashboard](#), and the [Custom Budget Entry](#). The Dashboard tab functionality differs between these options. All options have the Account Detail tab functionality. Please see [What is the Difference Between the Budget Data Entry Screens?](#) for more information.

Capital expenditures are entered through the [Manage Capex](#) screen.

### Dashboard tab

At the top of the screen are the [Search](#) criteria. The [Advanced](#) Search functionality is available.  
Please note that if you are in the Account Details tab, searching will take you back to the Dashboard tab.

Accounts highlighted are itemized, click the account number link to edit line items

Dashboard Account Details

CompanyDB: DB3147\_TW015 BudgetID: 2016 test Refresh Screen On Save Save Accounts

Print Export to Excel Print to PDF Autofit Columns

Display Level 15 Row Format Company P&L version 2 Show Rollup Sub-Totals Show Spread Columns Show Period Columns Show Assumption Column

AccountNum	AccountDescr	Assumption	Amount	SpreadMethod	Jan	Feb	Mar	Apr	May
DB3147_TW015					1,166.67	(1,373.33)	3,816.67	(533.33)	(83.33)
G&A					1,166.67	(1,373.33)	3,816.67	(533.33)	(83.33)

The Search criteria are:

- CompanyDB-this is a required field;
- BudgetID-this is a required field. In order for a BudgetID to be available for budgeting the "IsBudgeted" box needs to be checked in [Manage Budgets](#).
- OrgUnit-in order for an OrgUnit to be available for budgeting the "IsBudgeted" box needs to be checked in [Manage OrgUnits](#) ;
- OrgUnit Rollup - these are defined in [Manage OrgUnits](#);
- Object - in order for an Object to be available for budgeting the "IsBudgeted" box needs to be checked in [Manage Objects](#)
- Object Rollup - these are defined in [Manage Objects](#); and

g) [Form](#) data. Forms can be setup to provide comparative data which can be helpful as a guide when setting budgets. This pulldown lists "Enabled" Forms setup in [Define Basic Budget Entry Forms](#). Please note that if a Form has been selected, [Drill - Formatted Columns](#) functionality may be available to access, for example, Actual data.

In addition to the non-checking of the "IsBudgeted" box, fields may be unavailable to budget because the Chart of Accounts synchronization and related processes need to be completed ([Synchronize Chart of Accounts](#)).

Standard functionality is available including [Saving](#), [Print](#), [Exporting to Excel](#), [Print to PDF](#), [Autofit Columns](#), [Column Data Sort - Ascending/Descending](#), [Confirm not Saved Popup](#), and [Expand Columns](#).

The format of the on screen data can be customized by using the [Display Level](#), [Row Format](#), [Show Rollup Sub-Total](#) and [Expand/Collapse Rows](#) functionality.

By unchecking the following boxes, the need to scroll horizontally will be reduced, by hiding the data in the respective columns.

Show Spread Columns  Show Period Columns  Show Assumption Column

For example, the below shows the screen view with all boxes unchecked. Please compare to the above screenshot.

CompanyDB: DB3147\_TW015 BudgetID: 2016 test Refresh Screen On Save Save Accounts

Print Export to Excel Print to PDF Autofit Columns

Display Level 15 Row Format Company P&L version 2 Show Rollup Sub-Totals  Show Spread Columns  Show Period Columns  Show Assumption Column

AccountNum	AccountDescr	Total
DB3147_TW015		(6,850)
G&A		(6,850)
5100-00		-
100-5100-00	Salaries and Wages - Administration	-

Budget data can be entered in the cells within the below red box by using the [Spread Methods](#). Please note that the [Cell Math Functions](#) and [Copy and Paste](#) functions are also available for data entry.

AccountNum	AccountDescr	Assumption	Amount	SpreadMethod	Jan	Feb	Mar	Apr	May
DB3147_TW015					(183.33)	(2,183.33)	(183.33)	(583.33)	(133.33)
G&A					(183.33)	(2,183.33)	(183.33)	(583.33)	(133.33)
5100-00					-	-	-	-	-
100-5100-00	Salaries and Wages - Administration		0	0	-	-	-	-	-

Cells that are white can be edited. Cells that are grey in color have a [Row Lock](#).

The Account Details tab is accessed by [Drilling](#) down into the required AccountNum on the Dashboard tab.

The following "Right -Click" menu functionality is available:

Edit Budget	
Preview Budget	
Select All	Ctrl+A
Copy..	Ctrl+C
Copy with headers..	Ctrl+H
Paste..	
Check All	
Uncheck All	Ctrl+U

### The Accounts Details tab

This screen only displays the data related to a single AccountNum.

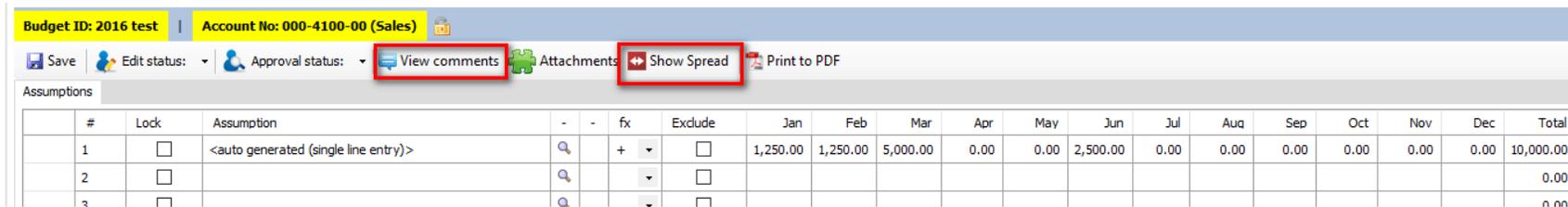
The screen has two sections. The top half is the Assumptions tab and the bottom half is the Budget Summary section.

A) Assumptions tab

The standard [Saving](#), [Edit Status and Account Approval](#), [Attachments](#), [Confirm not Saved Popup](#) and [Print to PDF](#) functionality is available.

Data can be copied to/from Excel using the [Copy and Paste](#) feature.

Comments and Spread can be viewed on clicking on the below button outlined in red.



Budget ID: 2016 test		Account No: 000-4100-00 (Sales)																	
Save	Edit status:	Approval status:	View comments	Attachments	Show Spread	Print to PDF													
#	Lock	Assumption	-	-	fx	Exclude	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1	<input type="checkbox"/>	<auto generated (single line entry)>	🔍	+	▼	<input type="checkbox"/>	1,250.00	1,250.00	5,000.00	0.00	0.00	2,500.00	0.00	0.00	0.00	0.00	0.00	0.00	10,000.00
2	<input type="checkbox"/>		🔍		▼	<input type="checkbox"/>													0.00
3	<input type="checkbox"/>		🔍		▼	<input type="checkbox"/>													0.00

This is what the screen will look like when the above "View Comment" and "Show Spread" buttons are clicked. Comments can be entered by typing in the 'Comments' box and then clicking "Submit". The "View comments" button will change color from white to light beige to indicated that a comment has been saved.





There are five tabs which provide the following information:

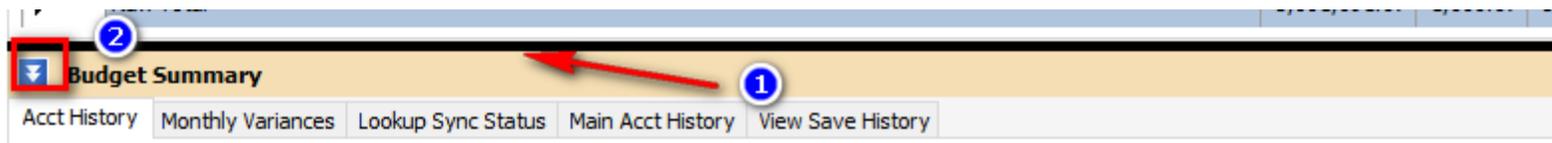
- 1) [Acct History](#);
- 2) [Monthly Variances](#);
- 3) [Lookup Sync Status](#);
- 4) [Main Acct History](#); and
- 5) [View Save History](#)

Please note that appropriate data from the above tabs can be [Copy and Pasted](#). If example, information on a View Save History row could be copied to replace the newest version of the same data in Accounts Details.

Please, also see related article: [How Do I Add/Delete BudgetIDs Displayed on the Budget Summary?](#)

Per below the view of the Budget Summary section:

- 1) Can be made larger/smaller by dragging the solid black line; and
- 2) Be hidden or revealed by clicking on these arrows.



The following "Right-Click" menu functionality is available:

Copy..	Ctrl+C
Copy (include headers)..	Ctrl+K
Paste..	Ctrl+V
AutoStyle Columns	