Custom Budget Entry is used for entering and viewing budgets.   As discussed in the Define Custom Budgets Entry Forms, all of the columns can be user defined.

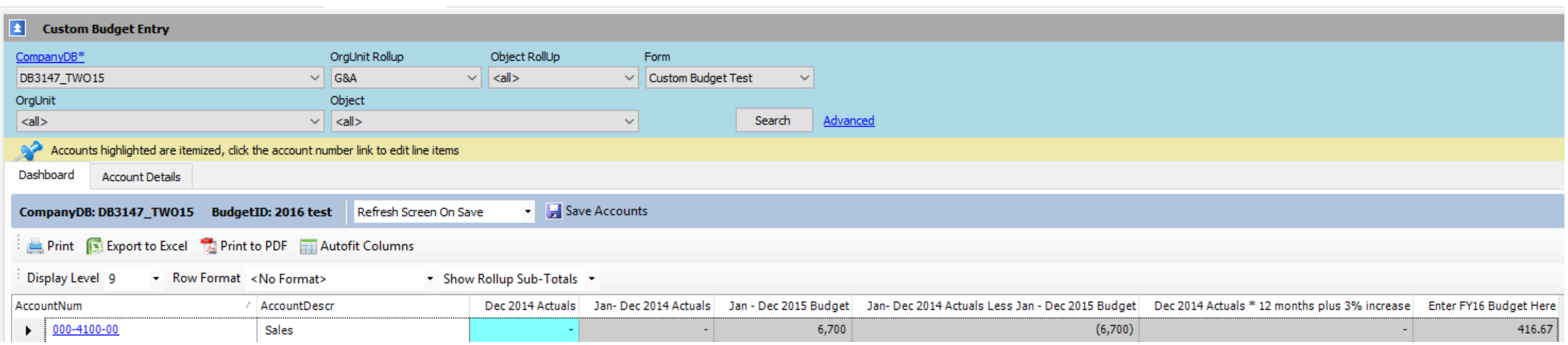
Custom Budget Entry has two tabs: Dashboard and Account Details.

Other Budget entry and viewing screen options are the Budgeting Dashboard, and the Basic 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 Each Budget Data Entry Option? for more information.

Capital expenditures are entered through the Manage Capex.

Related article includes: What Should I do If I Cannot Save Budget Data/View Actual Data in a Multi-Year Custom Budget Entry Form?

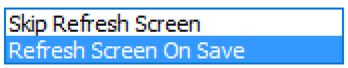
Dashboard tab
At the top of the screen are the Search criteria. The Advanced Search functionality is available.



The Search criteria are:
a) CompanyDB-this is a required field;
b) OrgUnit-in order for an OrgUnit to be available for budgeting the "IsBudgeted" box needs to be checked in Manage OrgUnits;
c) OrgUnit Rollup-these are defined in Manage OrgUnits
d) Object-in order for an Object to be available for budgeting the "IsBudgeted" box needs to be checked in Manage Objects;
e) Object Rollup-these are defined in Manage Objects; and
f) Form data. This pulldown lists the "Enabled" Forms setup in "Define Custom Budget Entry Forms".
Please note that when selecting a Form, Drill - Formatted Columns functionality may be available to access, for example, Actual data.

A specific AccountNum 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/Reduce Column Width.



The Save default is to refresh the screen on saving and this can be changed to skip the refresh by selecting from the above dropdown menu.

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

Please note that the Cell Math Functions and Copy and Paste functions are available for data entry. Cells that are white can be edited. Cells that are grey in color have a Row Lock.

Below is an example of a Define Custom Budget Entry forms that has been setup for Budget Entry in column 6.

Grid Layout | Column Layout

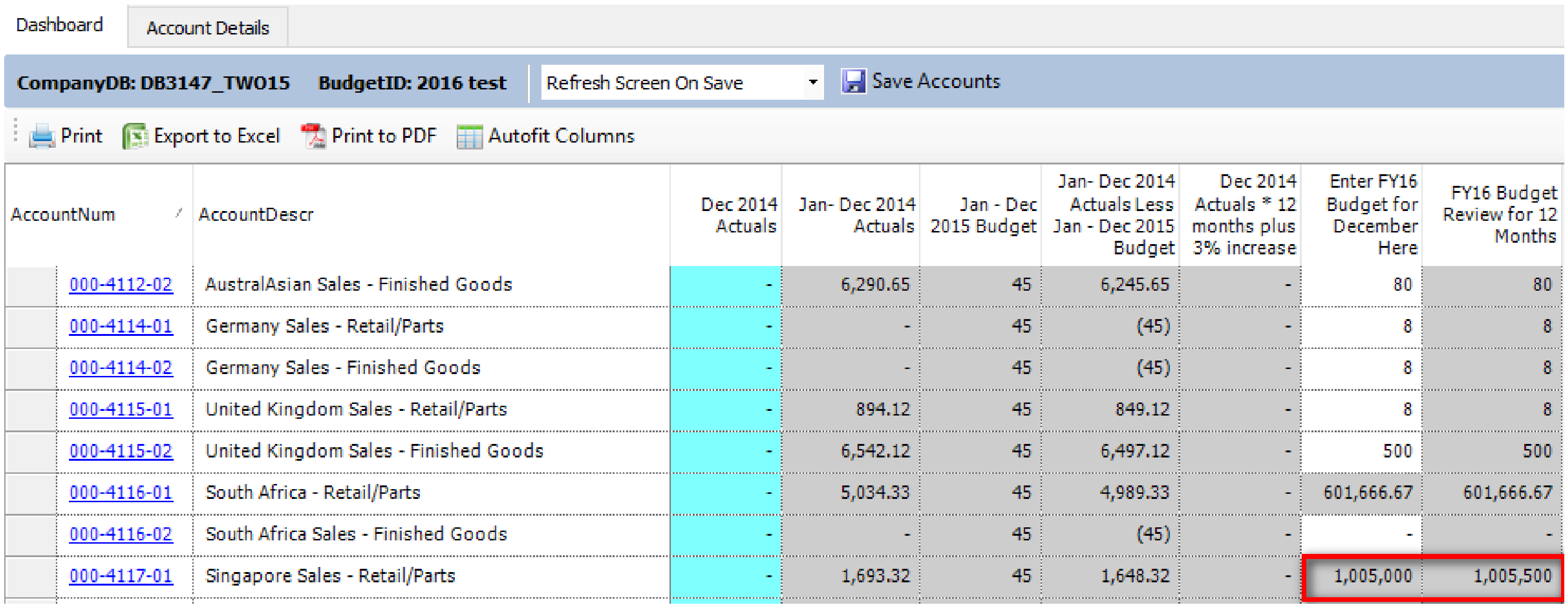
To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

Custom Calculations: Choose data type CustomCalc and use { } brackets to reference column #s.
Example: Year total = {1}+{2}+{3}+{4}+{5}+{6}+{7}+{8}+{9}+{10}+{11}+{12}
Right click within a formula cell to use sample inserts for Year Total or Q1 Average

Column Position	Column Name	Data Entry Type	BudgetID	Fiscal Period	Month / YTD	Report Level	1st Calc Factor	2nd Calc Factor	3rd Calc Factor	NumberFormat	Hidden ☐	Background Color	Text Color	FormulaResolved
1	Dec 2014 Actuals	ReadOnly	2014 Actual	Dec	Month	GLCode				Value	☐	80FF		
2	Jan- Dec 2014 Actuals	ReadOnly	2014 Actual	Dec	YTD	GLCode				Value	☐			
3	Jan - Dec 2015 Budget	ReadOnly	FY15	Dec	YTD	GLCode				Value	☐			
4	Jan- Dec 2014 Actuals Less Jan - Dec 2015 Budget	VarianceValue		BegBal		GLCode	2	3		Value	☐			(Col2 - Col3)
5	Dec 2014 Actuals * 12 months plus 3% increase	CustomCalc	2014 Actual	BegBal		GLCode				Value	☐			(({1}*12)*1.03)
6	Enter FY16 Budget for December Here	DataEntry	2016 test	Dec	Month	GLCode				Value	☐			
7	FY16 Budget Review for 12 Months	ReadOnly	2016 test	Dec	YTD	GLCode				Value	☐			

Data Entry columns when setup defaults to "Month" and in the above example December was selected as the Fiscal Period. This mean that data entered on the Dashboard tab will default to the month of December on the Account Details tab. Data that is entered in other months will therefore not be reflected in the December data entry column on the Dashboard tab. It is recommended that an additional Year-to-Date column is setup to reflect the data entered for all months (see column 7).

And this is how the Custom Budget Entry screen looks like for the above definition:



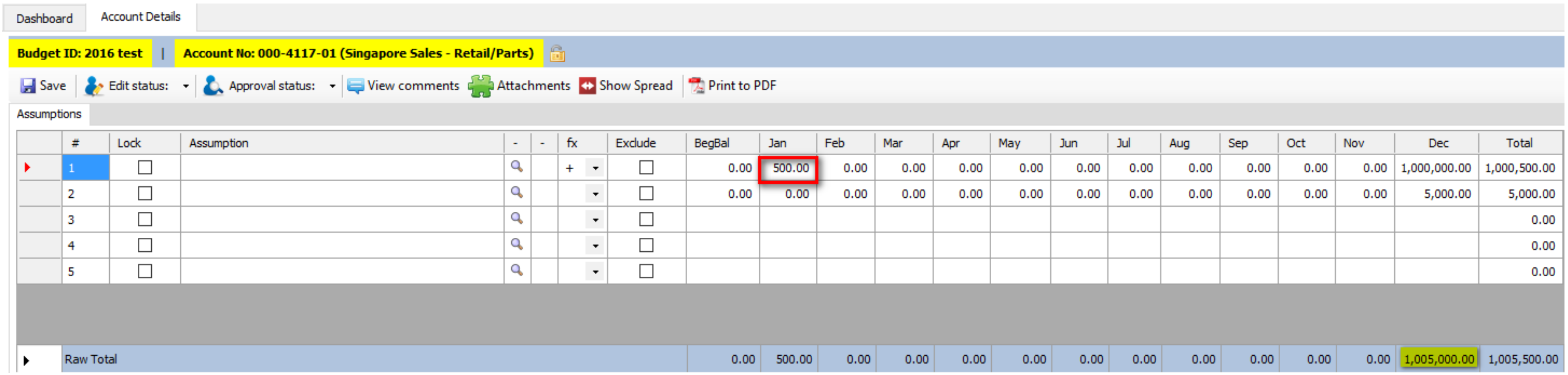
Dashboard | Account Details

CompanyDB: DB3147_TWO15 BudgetID: 2016 test | Refresh Screen On Save | Save Accounts

Print | Export to Excel | Print to PDF | Autofit Columns

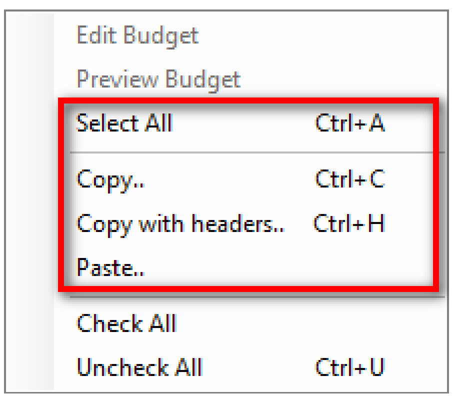
AccountNum	AccountDescr	Dec 2014 Actuals	Jan- Dec 2014 Actuals	Jan - Dec 2015 Budget	Jan- Dec 2014 Actuals Less Jan - Dec 2015 Budget	Dec 2014 Actuals * 12 months plus 3% increase	Enter FY16 Budget for December Here	FY16 Budget Review for 12 Months
000-4112-02	AustralAsian Sales - Finished Goods	-	6,290.65	45	6,245.65	-	80	80
000-4114-01	Germany Sales - Retail/Parts	-	-	45	(45)	-	8	8
000-4114-02	Germany Sales - Finished Goods	-	-	45	(45)	-	8	8
000-4115-01	United Kingdom Sales - Retail/Parts	-	894.12	45	849.12	-	8	8
000-4115-02	United Kingdom Sales - Finished Goods	-	6,542.12	45	6,497.12	-	500	500
000-4116-01	South Africa - Retail/Parts	-	5,034.33	45	4,989.33	-	601,666.67	601,666.67
000-4116-02	South Africa Sales - Finished Goods	-	-	45	(45)	-	-	-
000-4117-01	Singapore Sales - Retail/Parts	-	1,693.32	45	1,648.32	-	1,005,000	1,005,500

Please note that there is a $500 difference between the December and 12 months columns for account number 000-4117-01. The Account Details tab is accessed by Drilling down into the required AccountNum on the Dashboard tab. And in our example, you can see that $500 was entered in January, and that the December total on the Account Details tab equals the December column amount on the Dashboard tab, namely, $1,005,000.



Please note that if Columns have been setup with on-screen calculations (for example, VarianceValues) and when a new entry is made, please" Save" your work to refresh the calculation.

In addition to the above mentioned, Drill-Formatted Columns functionality, the below "Right-Click" menu is available:



The Accounts Details tab

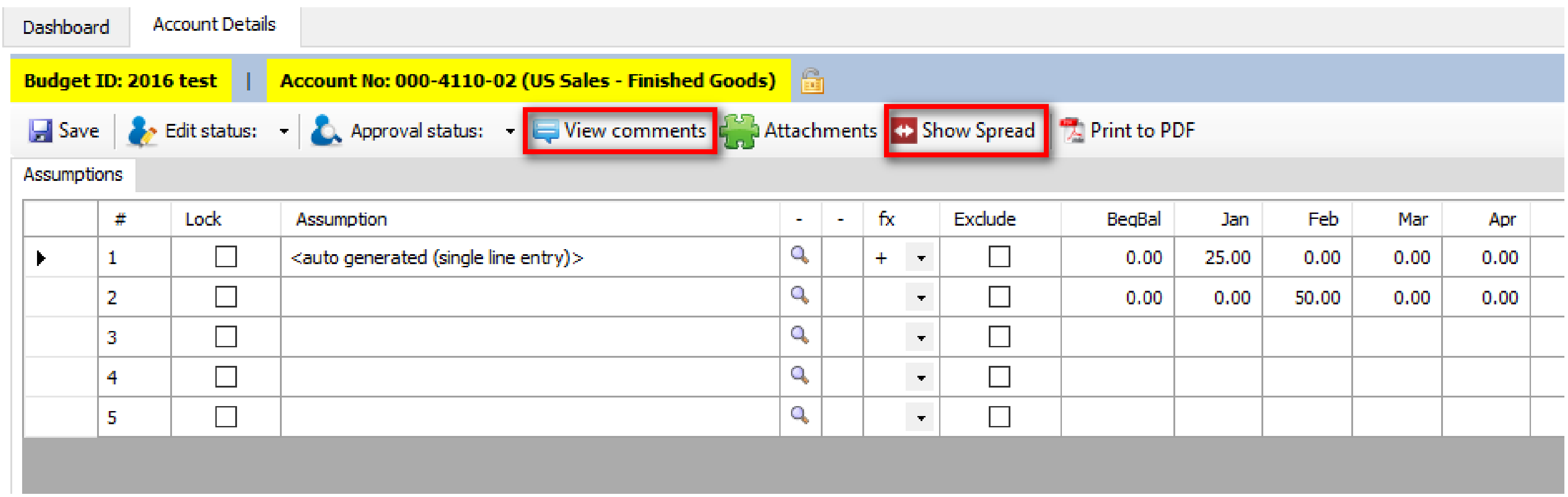
This screen only displays the data related to a single AccountNum.

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

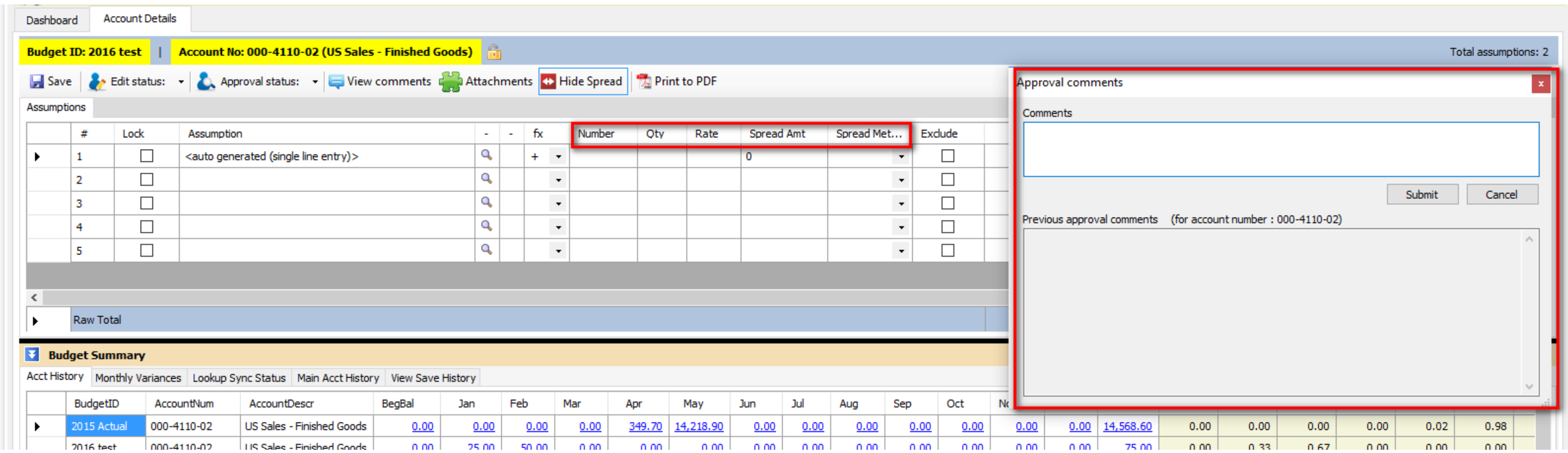
A) Assumptions tab

The standard Saving, Edit Status and Account Approval, Attachments, Confirm not Saved Popup, Expand/Reduce Column Width 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.



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.

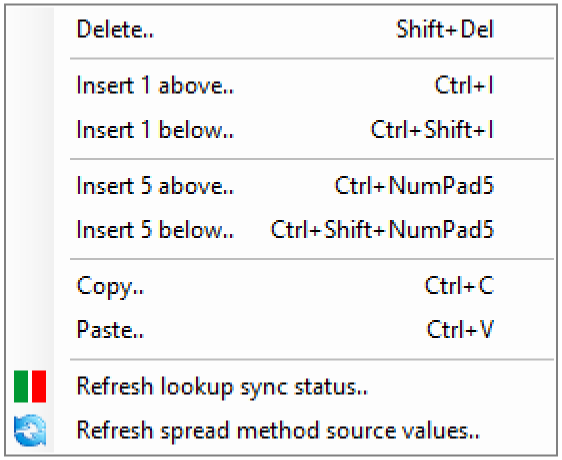
Data can be entered using the Show Spread Calculation - Expanded Spread Method, Simple Spread Methods, Row to Row Calculations, Cell Math Functions, Lookup, Copy and Paste, Apply Number Formatting and Exclude Row Function.

In addition data can be entered using the Import Budget Assumptions, Import Budget Assumptions Multi Company, and Copy Bulk Assumptions functionality.

Please see related article/s:
What Do I Do When I Cannot Save Account Data in a Multi-Year Custom Budget Entry Form?

When Lookup data is changed, the Refresh Lookup Syn Status functionality together with the Budget Summary - Lookup Sync Status can be used to view the change against the original Lookup data. Refresh Spread Method Source Values functionality is available.

The following "Right-Click" menu is available:



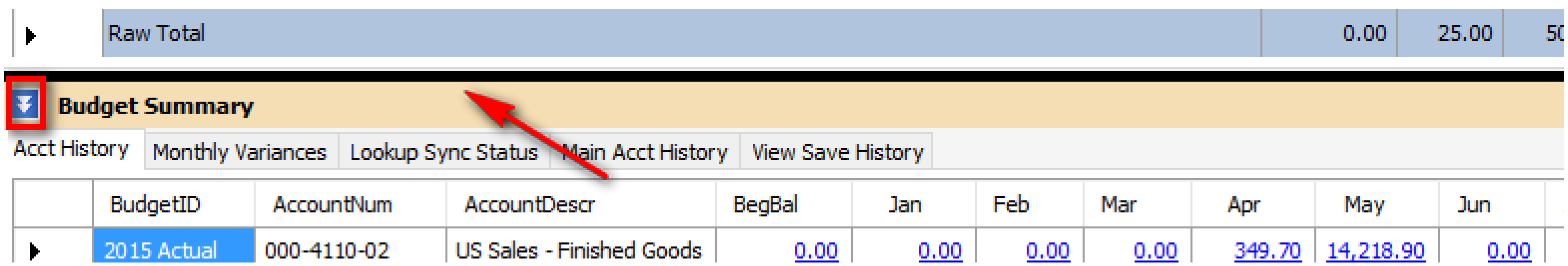
B) Budget Summary section.

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 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 the double arrows.



The following "Right-Click" menu is available: