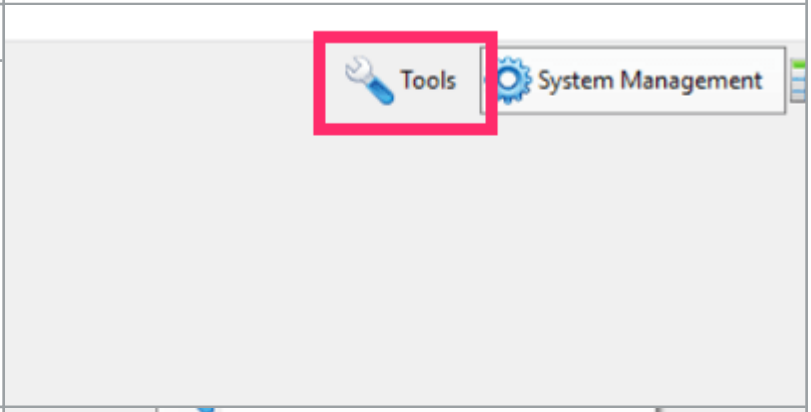
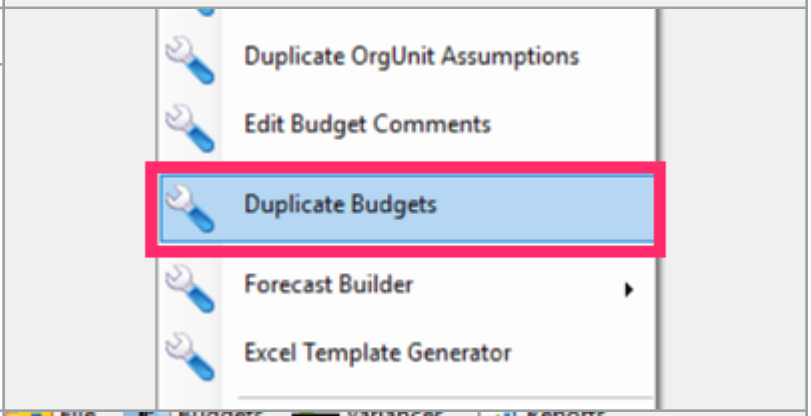
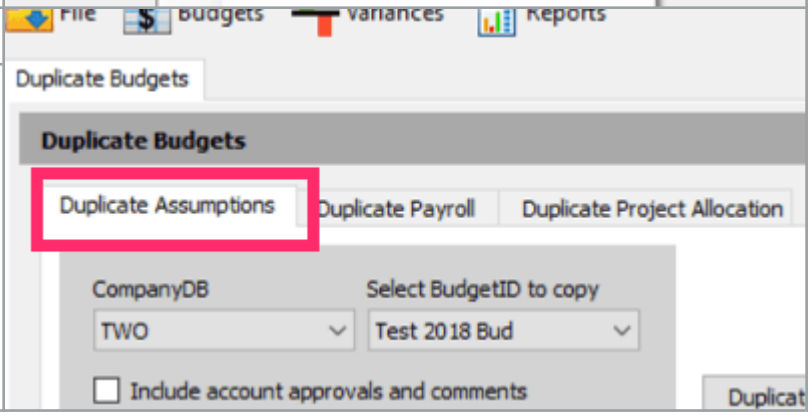
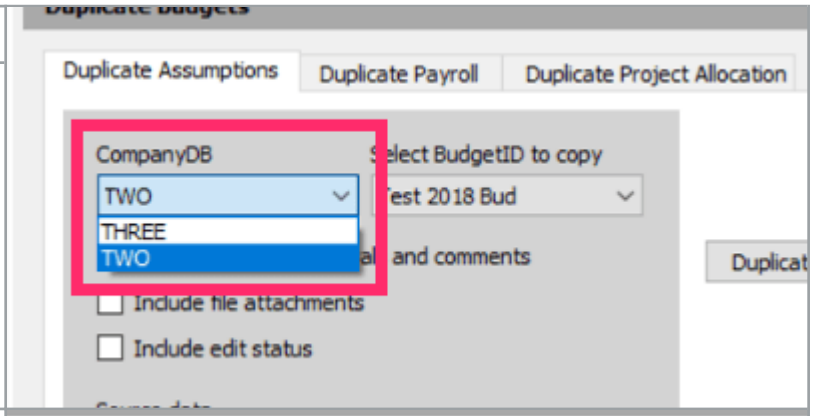
Dynamic Budgets User Guide for Duplicate Budget.	1	
Click on Tools.	2	
Click on Duplicate Budgets.	3	
You will automatically navigate to the Duplicate Assumptions tab.	4	

Select the CompanyDB to copy from the dropdown menu.

For this example, we will select TWO.

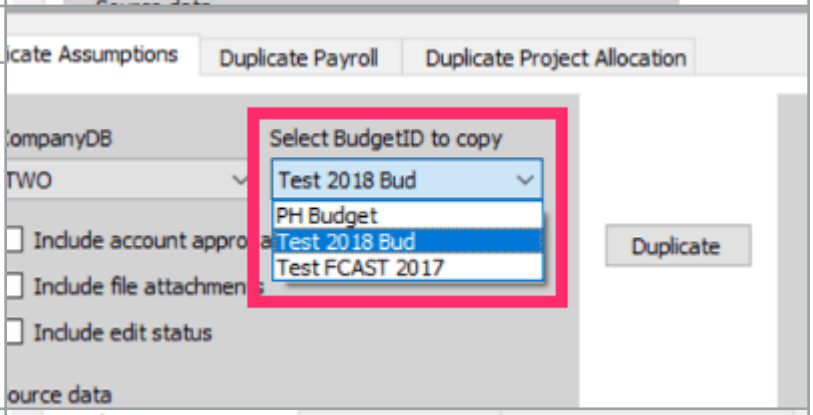
5



Select the BudgetID to copy from the dropdown menu.

For this example, we will select Test 2018 Bud.

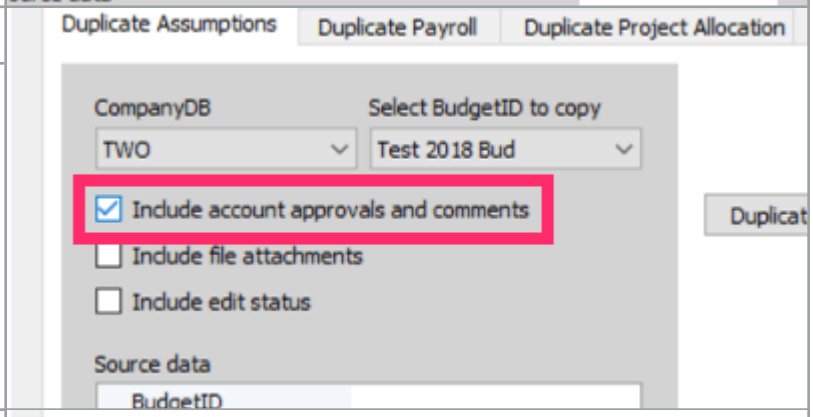
6



Now you have 3 optional selections to include with your duplicate assumptions:

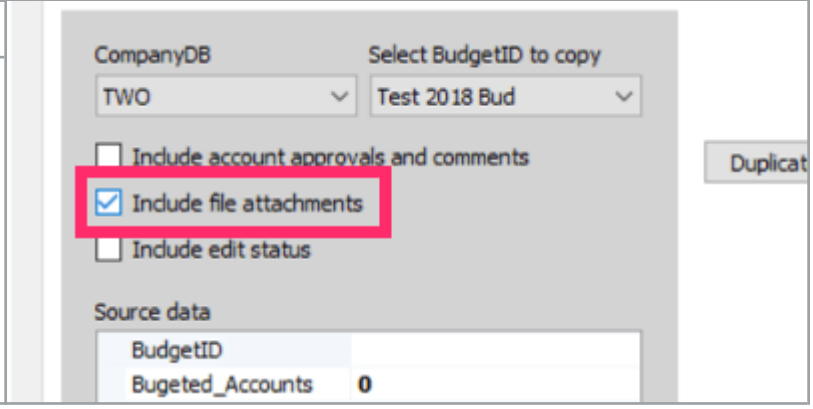
1. You can click in the box to Include account approvals and comments.

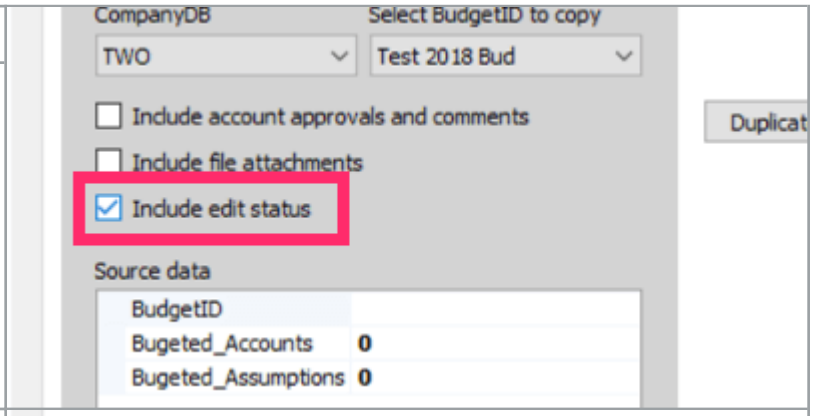
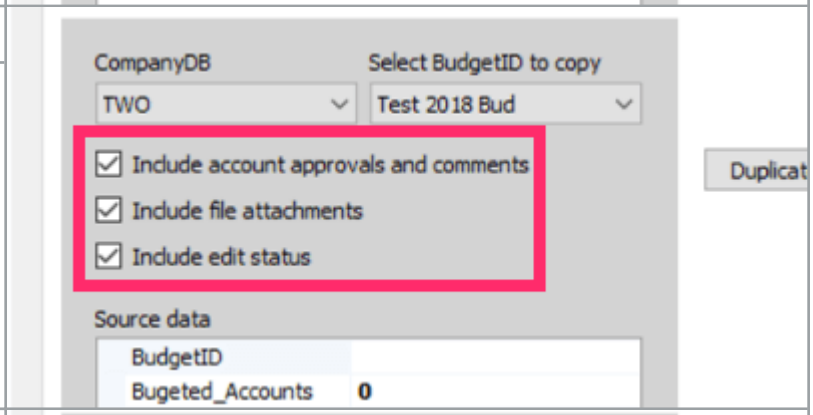
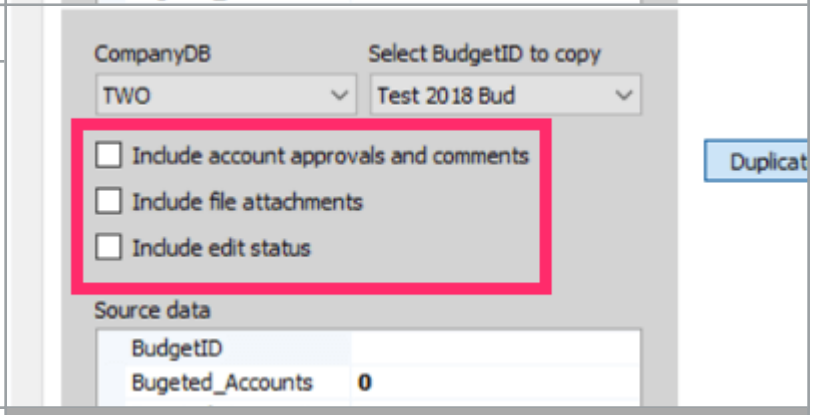
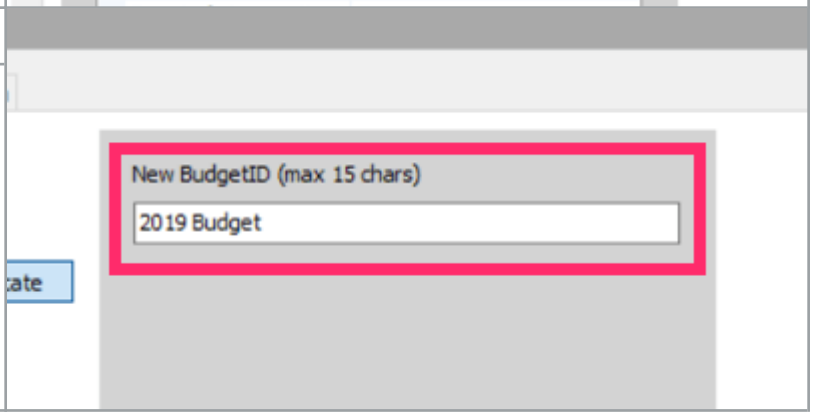
7



2. You can click in the box to Include file attachments.

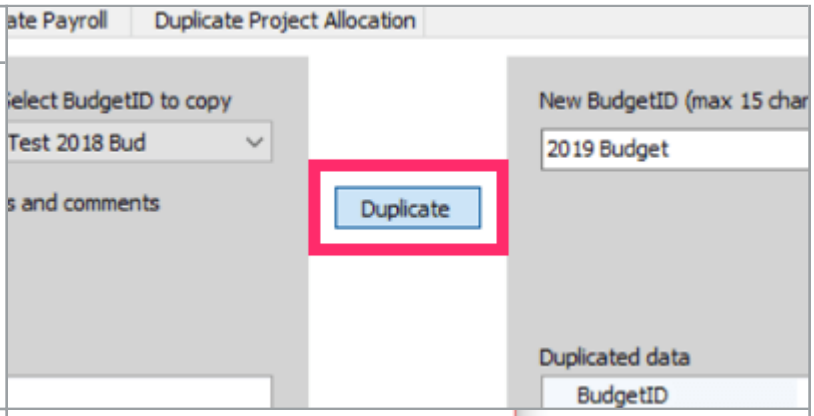
8



3. You can click in the box to Include edit status.	9	
Note: You can select all three options if necessary.	10	
In this example, we will uncheck all options.	11	
Click in the New BudgetID box and type 2019 Budget.	12	

13

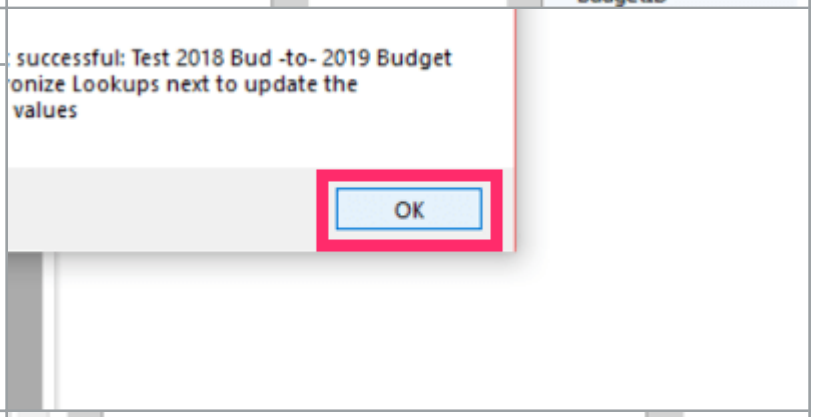
Click on Duplicate.



14

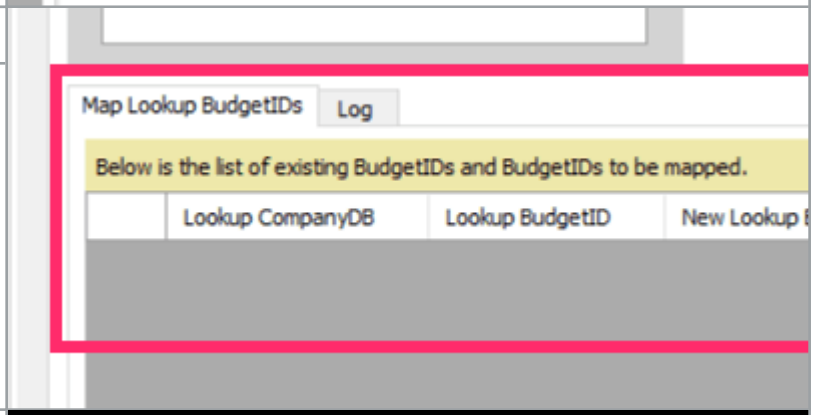
A message box will appear that reads, Duplicate budget successful: Test 2018 Bud-to-2019 Budget. Please run Synchronize Lookups next to update the Lookup_Budget values.

Now Click OK.



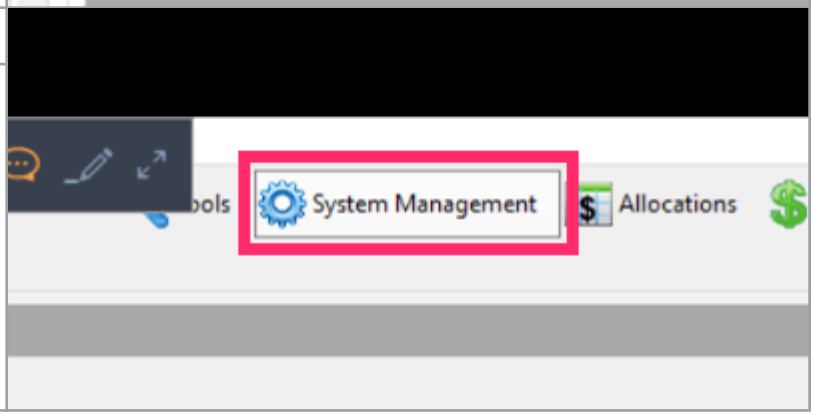
15

Note: You do NOT need to run the Synchronize routine if the Map Lookup BudgetIDs tab is empty or does not list BudgetIDs to be mapped.



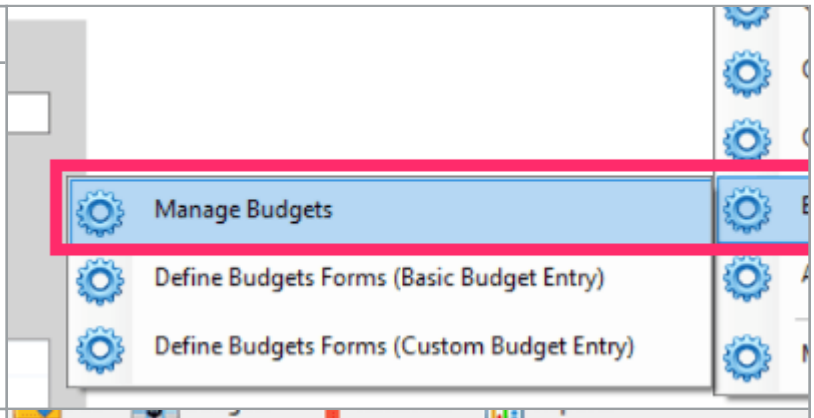
16

To verify the duplicate budget is added, click on System Management.



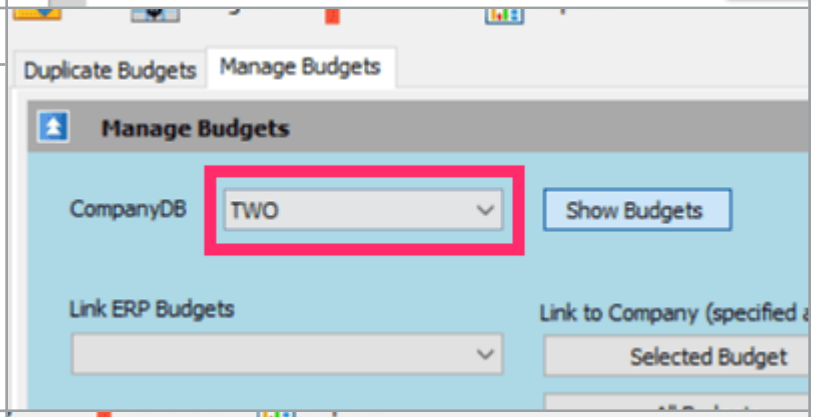
Click on Budgets, Manage Budgets.

17



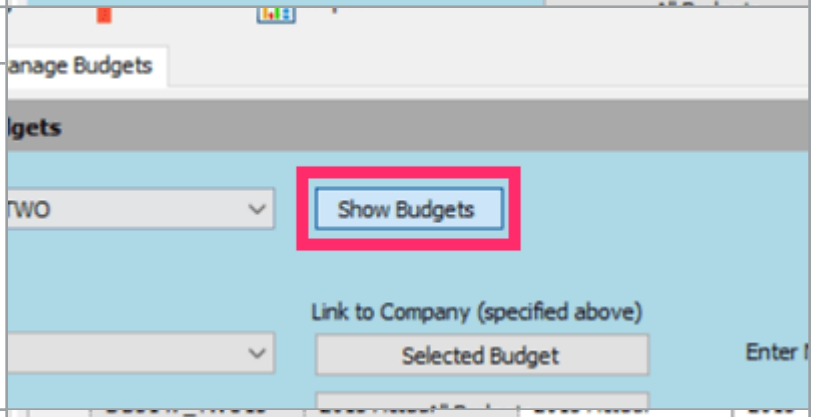
Select CompanyDB TWO.

18



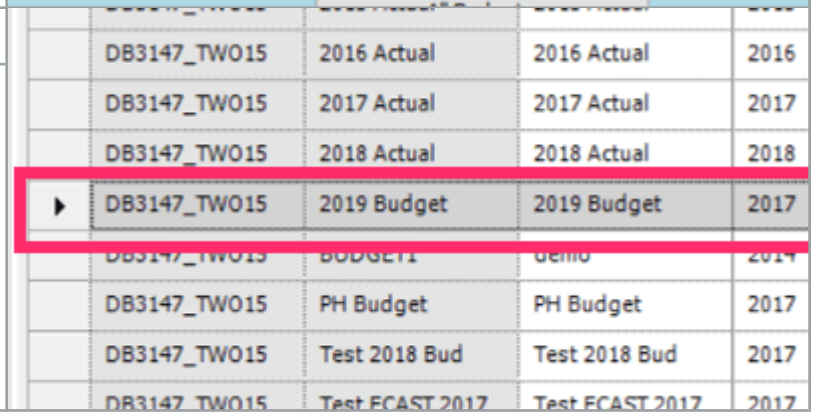
Click on Show Budgets.

19

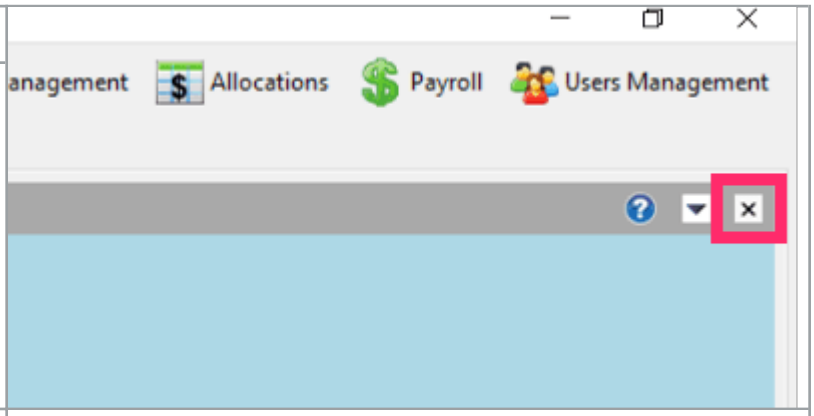


Now you see that 2019 Budget was added.

20



DB3147_TWO15	2016 Actual	2016 Actual	2016
DB3147_TWO15	2017 Actual	2017 Actual	2017
DB3147_TWO15	2018 Actual	2018 Actual	2018
DB3147_TWO15	2019 Budget	2019 Budget	2017
DB3147_TWO15	PH Budget	PH Budget	2017
DB3147_TWO15	Test 2018 Bud	Test 2018 Bud	2017

Click on the X to close.	21 
That's It. You're Done	22