

BENEFITS

Manage budgets more effectively

PSS Budget entry simplifies entering and editing budget information in Dynamics SL. Organize users by departments to provide control of who can edit and approve budget data.

Maintain security

The Budget Entry utility allows users to be organized as module supervisors, approvers or data entry personnel. Only supervisors can upload final budget amounts. Tier approvals make sure that each approver signs off on amounts before they can be uploaded.

Put your information to work

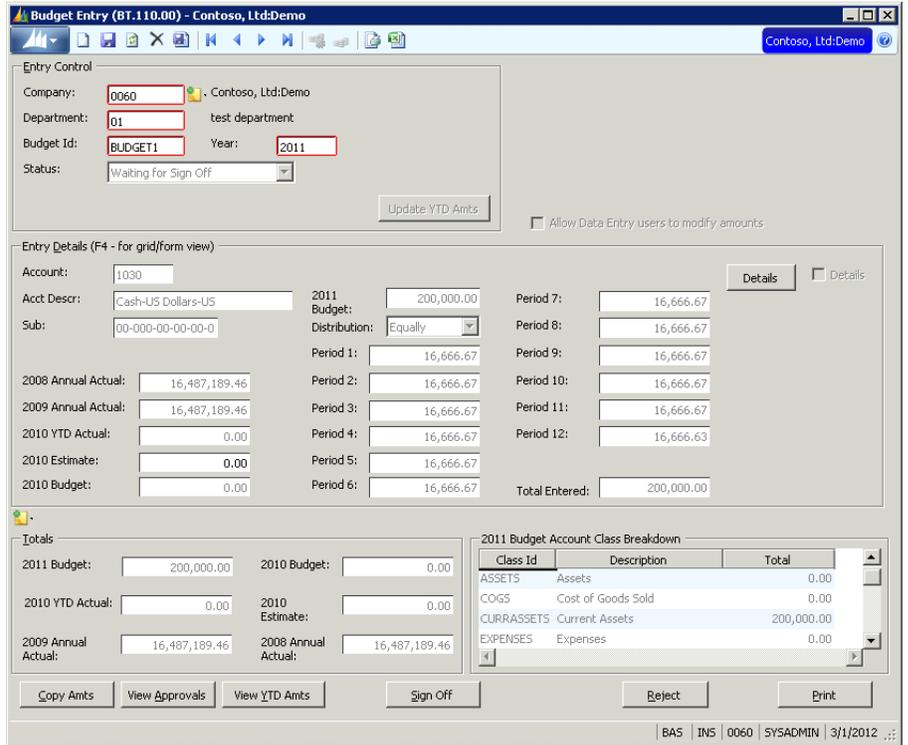
Allows for upload of Budget detail into Budget Maintenance screen in GL. Prior year Budget amounts and notes can be copied over to the new budget year. For use with FRx and financial reporting.

Unlimited Users

As with all of the PSS products, Budget Entry comes with an unlimited number of users per each SL System database.

Budget Entry and Approval

Improve your budgeting process by entering and approving budget information from within Dynamics SL.



Entry Control

Company: 0060 Contoso, Ltd:Demo
 Department: 01 test department
 Budget Id: BUDGET1 Year: 2011
 Status: Waiting for Sign Off

Entry Details (F4 - For grid/form view)

Account: 1030
 Acct Descr: Cash-US Dollars-US
 Sub: 00-000-00-00-00-0

2011 Budget: 200,000.00
 Distribution: Equally

Period	Amount
Period 1	16,666.67
Period 2	16,666.67
Period 3	16,666.67
Period 4	16,666.67
Period 5	16,666.67
Period 6	16,666.67
Period 7	16,666.67
Period 8	16,666.67
Period 9	16,666.67
Period 10	16,666.67
Period 11	16,666.67
Period 12	16,666.63
Total Entered:	200,000.00

2008 Annual Actual: 16,487,189.46
 2009 Annual Actual: 16,487,189.46
 2010 YTD Actual: 0.00
 2010 Estimate: 0.00
 2010 Budget: 0.00

Totals

Year	Budget	YTD Actual	Estimate	Annual Actual
2011	200,000.00	0.00	0.00	16,487,189.46
2010	0.00	0.00	0.00	16,487,189.46

2011 Budget Account Class Breakdown

Class Id	Description	Total
ASSETS	Assets	0.00
COGS	Cost of Goods Sold	0.00
CURRASSETS	Current Assets	200,000.00
EXPENSES	Expenses	0.00

Buttons: Copy Amts, View Approvals, View YTD Amts, Sign Off, Reject, Print

Footer: BAS | INS | 0060 | SYSADMIN | 3/1/2012

Key Features

Group Accounts/Sub-Accounts by department.

Copy last year's information and/or use multiple distribution methods.

Add details to budget amounts.

Email functionality for approvals up to 5 levels.

Declined budgets allow notes and sends email to preparers.

View prior year Budget, TD and current YTD amounts in one screen.

Budget information available to FRx and other standard reports.

FEATURES OVERVIEW

Organize Users

Organizes users by departments to provide control of who can enter and approve budgets.

Assign Accounts by Departments

Assign accounts and sub-accounts to departments/users.

Get Organized

Allows you to copy from prior year, enter details, view multiple years, grow budgets and more. Enter details of what makes up a budget number.

Automate Approvals

Automatically email for approval. Once approved update the specified budget on the GL with the click of a button.

Prepare Quarterly Budgets

You can prepare quarterly budgets based on the previous quarter's actual amounts.

View Budgets with Ease

Managers can have access to the YTD Actual Inquiry screen which allows them to view their budget to actual amounts.

Create Reports with Ease

Date: 3/3/2009
Time: 09:59AM
User: SYSADMIN

PSS 0
Budget Entry - Detail with Periods

Department:		DEPT1	Department 1	Fiscal Year:	2008	Budget ID:	BUDGET	Status:	No Entry Records				
Account	Sub	Description	2006 YTD	2007 YTD	2007 Budget	Budget	Period 1	Period 2	Period 3	Period 4	Period 5		
1015	ADMN-OH	Administration Overhead	46,836.68	37,059.68	4,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
2008 DEPT1 BUDGET Total			46,836.68		4,000.00	0.00	0.00	0.00	0.00	0.00	0.00		
				37,059.68		0.00		0.00		0.00			

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