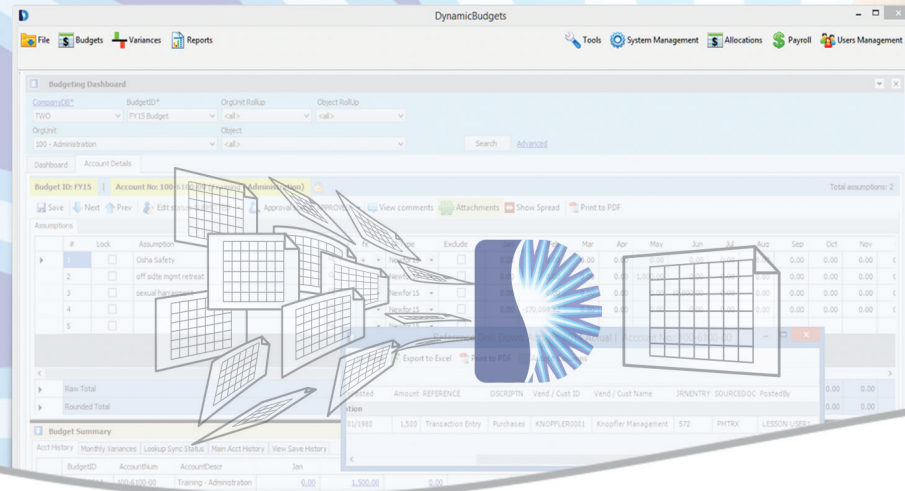# POWERFUL BUDGETING MADE EASY

Introducing Dynamic Budgets for Dynamics NAV
Powerful, Easier to Manage than a Chaotic Web of Spreadsheets

Install & Configure 2 hours	Admin Training 5 hours	End User Training 30 mins

Why Our Partners Like Dynamic Budgets

- In 2 hours the product was installed, financials were live, plus custom reports and budget forms were set up. We simply couldn't do that in any other tool so quickly
- Any of our staff can install Dynamic Budgets and train our customers
- Upgrades are a snap
- Dynamic Budgets responds immediately to requests for enhancements and bug fixes
- **It was easier to sell a budgeting solution vs. a CPM suite**
- **The customer already had reporting, we just needed a budgeting tool**

What Our Customers are Saying

- Installing Dynamic Budgets was fast and easy
- Control which deminsions should be used with which accounts
- No need to break apart and distribute the NAV Excel template - direct security access per user
- You don't have to import financials - it's live-linked to NAV
- Real-time transaction drill-downs are awesome!
- We can budget to dimensions, vendors, customers...
- It was an easy IT approval, especially with Active Directory
- **Our end users actually like it!**

Unlimited users, no Dynamics user requirement
Immediate measurable results, reducing weeks of effort

DYNAMIC™ BUDGETS

Call (650)-332-6650 or email: sales@dynamicbudgets.com

KEY FEATURES

ADVANTAGES

- Install & Setup in 1-2 hours
- After 5 hours training, admins are comfortable in the system, payroll is loaded, and you are ready for zero-based budgeting
- Standard interface eliminates need to generate templates
- Live linked to the ERP - No need to import financials
- Real-time drill downs to accounting details
- Powerful, intuitive, easy to use, and users like it!

BUDGETING TOOLS

- Standardized templates, no need to labor over setup
- Cash Flow
- Multiple styles of data entry (simple annual target, simple monthly values, or itemized monthly)
- Prebuilt math functions (no excel like formula bar) to contain the chaos
- Live-linked to Dynamics for self service data fetches (prior year, spend by vendor, revenue by customer, sales by territory, etc)
- 1-click drill down to transaction details in budget entry screens (why did I spend $$ last May, should I budget for that next year?)
- Detailed Payroll for Salaried or Hourly Staff
  (including cross department allocations, and yes FICA correctly accrues from January)
- Allocations (Fixed or Variable – Zero out a department, handful of accounts, free form amount, or mass 1:1 account visibility)
- Budget to Dimensions, Analytical Accounting, Vendor, Customer, Sales Rep, Territory, etc...

REFORECASTING TOOLS

- Forecast Template Engine (Blend YTD & (budget or prior year or average run rate...)
- 2 clicks to include another month of actuals for every account
- Budget Reallocations for PO Encumbrance (allow for budget movements but total must not change)
- Tool to spread a simple annual budget into a more detailed budget with Monthly Values
  (Generic spreads like monthly, custom spreads (based on home game schedule) or based on the account's prior year history)

REPORTING FEATURES

- Simple, Fast, reporting
- Real-time Live Linked to your Dynamics Data! No need to Import.
- Users have immediate self-service access to budgets and actuals
- No need for Finance to export and run formal reports
- Simple rollup reporting using text labels for groupings
- Column Designer is familiar for FRx / MR users
- Not a replacement for Board Level Reporting
- Positioned as an informal reporting tool to take the pressure off formal reporting

TYPICAL 5 HOUR TRAINING AGENDA

Lesson 1
General system familiarity, reporting categories, setup custom report formats.

Lesson 2
User Security, Introduce you to the available options, setup sample users, assign homework and schedule follow up to mentor your copying and pasting of data.

Lesson 3
Payroll, introduction to available payroll styles, review data needs (employee roster, tax and benefit rates, employee assignments and elections), assign homework, schedule follow up to mentor your copying and pasting of data.

Lesson 4
Overview of other features (Spread methods, setup Variance Reports, Import, Export, Duplicate Budgets, Forecast Templates)

Notes