Eclipse Sales Budgeting

Release 8.6.2 (Eterm)

Legal Notices

Activant® Eclipse™ 8.6.2 Online Help System

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Sales Budgeting Overview

A sales budget is a detailed schedule that shows the sales revenues your company expects to generate over the next year. You can survey past and potential future customers, monitor sales trends of previous years, and conduct market research to assist you determining future sales trends.

Sales Budget Development

To develop a sales budget, you need to estimate how many units of a product you expect to sell each month, taking into account seasonal or periodic fluctuations to arrive at a more accurate overall picture. Once you have determined the number of units, convert this into a dollar figure. Remember to consider inflation rates when you calculate this amount. After you have arrived at a figure, determine the expenses you expect to incur in earning that income so that you can determine how much profit you can anticipate receiving.

Budget Group Creation

Use the Sales Budgeting application to assist you in developing, maintaining, and analyzing your budget. You can base your sales budgets on specific products, or create groups of similar products and budget based on those groups.

Budget Entry

After you have created the budget group and assigned various related products or price lines to it, you can then begin the process of assigning monthly and yearly sales estimates to the products or budget groups broken down by customer. If your sales fluctuate by the season or during specific periods, you can create default monthly percentages by customer or for your company as a whole.

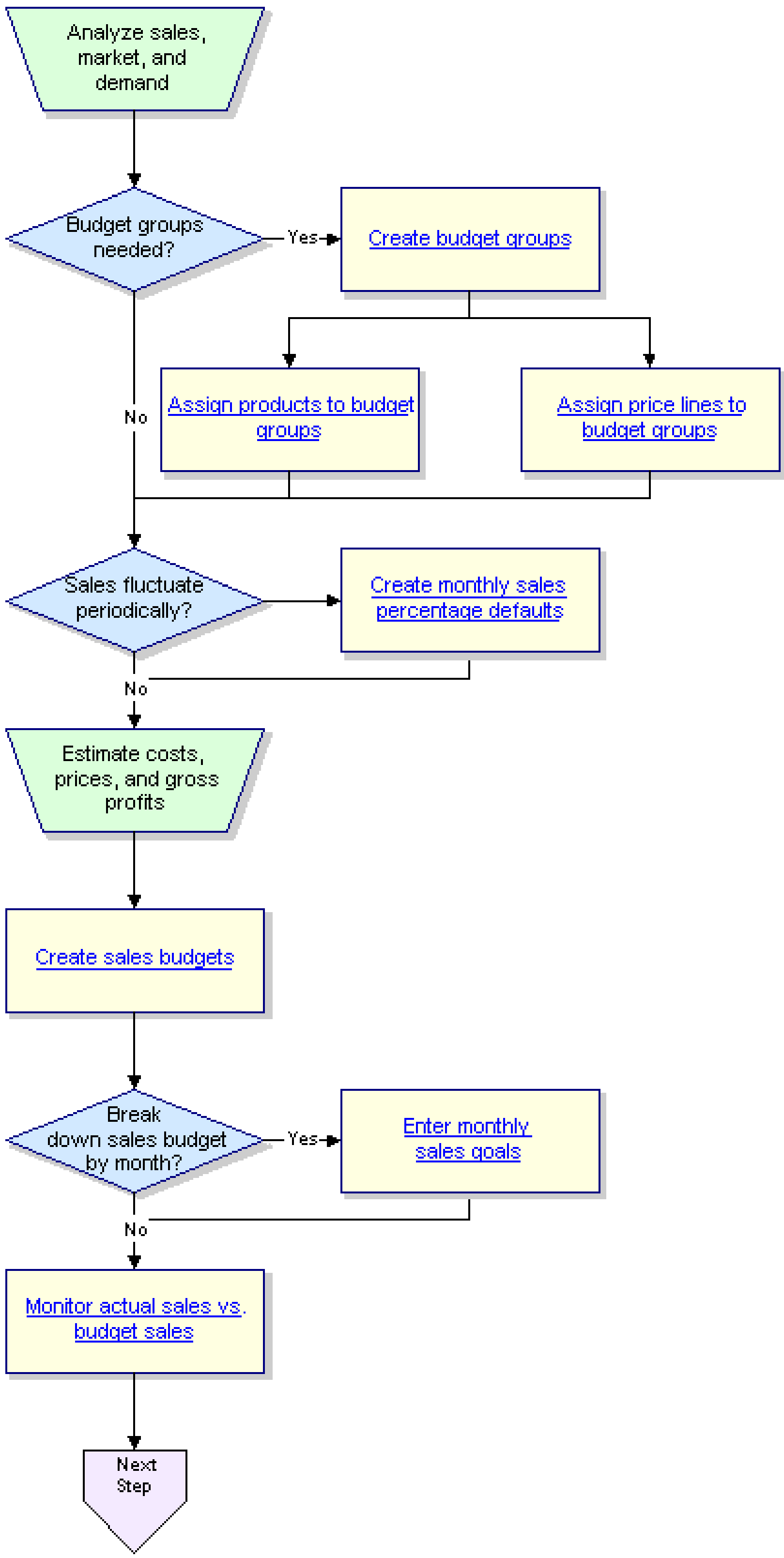
Budget Analysis

After you have created your sales budget, you can then monitor your actual sales against the amounts you have budgeted. If sales are by far exceeding or not meeting your budget figures, if you have authorization, you can adjust the budget up or down, as needed. The system provides a budget analysis report to assist you in determining how well you are meeting projections. If, after a year, you are comfortable with how your company is performing compared to the budget, you can copy last year's budget over for the new year and adjust next year's projections to meet the new inflation rates.

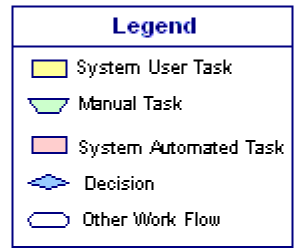
See Also:

Sales Budget Processing Workflow

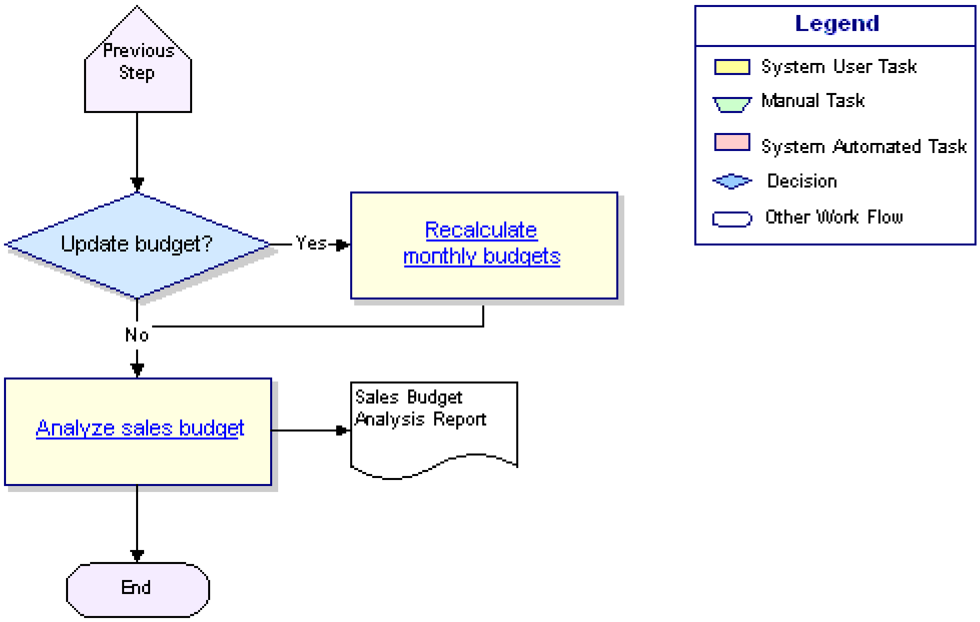
Sales Budget Processing Workflow



Setup Considerations



Sales Budget Processing Workflow – continued



See Also:

Sales Budgeting Overview

Setup Requirements for Sales Budgeting

Following are the control maintenance records and authorization keys used for sales budgeting, along with additional setup requirements.

Control Maintenance Records

Set the following control maintenance record:

- Budget Sales By Fiscal Year

Authorization Keys

Assign the following authorization key:

- BUDGET.QUEUE

Budget Groups

You can create groups of price lines or products to make entering sales goals easier, if needed. For more information, see the Budget Groups Overview.

Sales Budget Detail Maintenance

You must enter sales goals for each customer whose buying habits you want to track.

Sales Budget Monthly Defaults

You can also define customer or company monthly sales percentage defaults.

Converting Foreign Currency

Sales budgeting can display or convert foreign currency. If needed, specify the customer's currency in the **Primary Currency** field on the Customer Pricing/Printing screen.

See Also:

Sales Budgeting Overview

Sales Budget Processing Workflow

Budget Groups Overview

Before you enter sales budgets for your customers, you may want to define sales budget groups. A *budget group* is any product or group of products, such as a price line, that you use as the basis for calculating your sales goals.

You can create any type of budget groups that you need. For example, if you have a customer that buys products only from your lighting line, you can set up a budget group for those specific products. This prevents you from having to enter the products one by one on the customer's sales budget. However, you still have the option to budget individual items, if needed.

Once you have created the budget group, you need to assign individual products, a price line, or a combination of both to it before you can begin calculating your sales budget for the year.

See Also:

Sales Budgeting Overview

Sales Budget Processing Workflow

Setup Requirements for Sales Budgeting

Defining Sales Budget Groups

Use the Sales Budget Group Maintenance screen to define sales budget group names and descriptions. A *budget group* is an assortment of similar products grouped together for sales budgeting and tracking purposes. After you define the group, you must assign products or price lines to it before you can use it to create your sales budget.

To define a sales budget group:

1. From the **Files** > **Sales Budgeting** menu, select **Sales Budget Group Maint** to display the Sales Budget Group Maintenance screen.
2. In the **Budget Group ID** field, type a brief descriptive name for the group and press **Enter** to display a selection list.
3. Select **New** and press **Enter** to return to the Sales Budget Group Maintenance screen.
4. In the **Full Description** field, enter a more complete description for the group.
5. Press **Esc** to save the sales budget group and exit the screen.

See Also:

Budget Groups Overview

Editing or Deleting Sales Budget Groups

Sales Budget Processing Workflow

Editing or Deleting Sales Budget Groups

After you create a sales budget group, you may need to change its description or delete it. If you delete a budget group code, the system removes it from any products or price lines.

To edit or delete a sales budget group:

1. From the **Files** > **Sales Budgeting** menu, select **Sales Budget Group Maint** to display the Sales Budget Group Maintenance screen.
2. In the **Budget Group ID** field, enter the name of the group to edit.

   If more than one budget group matches your selection, a selection list displays. Select the correct budget group and press **Enter** to return it to the field.
3. Do one of the following:

To...	Do this...
change the description	in the **Full Description** field, type the new description. Press **Esc** to save your changes and clear the screen.
delete the sales budget group	use the **Delete** hot key to display a confirmation screen. Enter **delete** to clear the screen.

4. Press **Esc** to exit the screen.

See Also:

Budget Groups Overview

Sales Budget Processing Workflow

Assigning Products to Budget Groups

If you want to base a sales budget on a single product, you do not need to create a budget group. However, you may want to base a budget on several unrelated products. To do this, define a sales budget group and assign products to it using the Product Maintenance application. Alternatively, if all of the products you want to use in the budget group belong to the same price line, you can instead assign the price line to the budget group.

To assign a product to a budget group:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display a product record.
3. In the **Budget Group** field, enter the sales budget group ID.
4. Continue working with the product record, as needed.

See Also:

Budget Groups Overview

Sales Budget Processing Workflow

Assigning Price Lines to Budget Groups

If you want to base a sales budget on a series of products that belong to a price line, you can assign the price line to a budget group. However, if the products are unrelated, you need to assign each individual product to a budget group. You can also assign a combination of products and price lines to a budget group, if needed.

To assign a price line to a budget group:

1. From the **Files** > **Price Maintenance** menu, select **Price Line** to display the Price Line Maintenance screen.
2. Create or display a price line.
3. Use the **Budget Group** hot key to display a prompt.
4. At the Enter Budget Group prompt, enter the sales budget group ID to which to assign the price line.

   If more than one name matches your entry, a selection list displays. Select the budget group and press **Enter** to return it to the field.
5. Press **Esc** to save the price line and exit the screen.

See Also:

Budget Groups Overview

Sales Budget Processing Workflow

Yearly Sales Goals Overview

Whether or not you elect to create budget groups, you need to enter sales goals for each of your customers. Sales budgets can be as general as an overall yearly sales goal, or as complex as a month-by-month breakdown of each product or budget group.

Entry Methods

The system provides several methods of entering sales budgets. If another customer's budget is similar to the one you are entering, you can copy either the entire budget or selected products or budget groups. You can copy last year's budget over into this year's budget and tweak the numbers. In addition, you can create a yearly overall budget, a yearly budget based on specific products or budget groups, or a budget broken down by product by month.

See Also:

Sales Budgeting Overview

Sales Budget Processing Workflow

Monthly Sales Goals Overview

Foreign Currency Conversion Concepts

When a customer's primary currency is different from your company's base currency:

- The customer's currency and the current day's exchange rate display highlighted on the Sales Budget Detail Maintenance screen.
- The system bases the budget amounts you enter on the Sales Budget Detail Maintenance screen on your *customer's* currency, not your company's base currency.
- The system converts the Sales Budget Analysis Report information and displays it in the customer's currency.

Specify a customer's currency in the **Primary Currency** field on the Customer Pricing/Printing screen.

See Also:

Setup Requirements for Sales Budgeting

Entering Customer Sales Goals

Use the Sales Budget Detail Maintenance screen to enter a sales budget for a customer. On this screen, you define your sales goals for the customer for the next year. You can set goals in a variety of ways. For example, you can enter a total sales goal for all products or budget individual goals for specific products. You can also assign sales budgets to budget groups to track your own predefined product groups.

> **Note:** Zeroes in any field constitute a customer budget. To assign no budget, all fields must be blank. The screen identifies whether the customer uses a foreign currency; if so, assign the budget based on their primary currency.

This topic includes information about:

- Entering a general yearly budget for a customer.
- Entering budgets for specific products or budget groups.

To locate a customer:

1. From the **Files > Sales Budgeting** menu, select **Sales Budget Detail Maint** to display the Sales Budget Detail Maintenance screen.
2. In the **Customer** field, enter the name of the individual or company for which to enter sales goals. This can be either a bill-to or a ship-to customer.

   If more than one customer matches your entry, a selection list displays. Select the customer name from the list and press **Enter** to return it to the Sales Budget Detail Maintenance screen.
3. In the **Year** field, enter the sales year for which this budget is active. The system populates this field with the current year.

To enter a general yearly sales budget:

1. Locate the customer whose budget you want to enter.
2. In the **Total Sales $** field, enter a dollar amount that represents the total sales budget goal for this customer this year.

   The system compares this information to your actual sales during sales budget analysis.
3. In the **Total GP $** field, enter a dollar amount that represents the total gross profit budget goal for this customer this year.

   The system compares this information with your actual profit during sales budget analysis.
4. Press **Esc** to save the budget and clear the screen.

   > **Note:** If you later decide to add product or budget group sales and gross profit budgets, the amount you enter in the **Total Sales $** and **Totals GP $** fields must be greater than or equal to those amounts.

To enter sales goals for specific products or budget groups:

1. Locate the customer whose budget you want to enter.
2. For each product or budget group, in the **Desc,/Budget Group** column, do one of the following:

To enter sales goals for a...	Enter a...
product	descriptive keyword to display a selection list. Select the product and press **Enter** to return it to the field. See Searching for Products for additional methods.
budget group	forward slash (/) and all or part of the budget group name. If more than one group matches your entry, a selection list displays. Select the group and press **Enter** to return it to the field.

3. In the **Sales $** field, enter a whole dollar amount that represents the yearly sales goal for the product or sales budget group.
4. Complete one of the following fields:

Field	Description
GP $	A whole dollar amount that represents the yearly gross profit goal for this product or budget group. If you complete this field, the system populates the **GP %** field with the corresponding gross profit percentage amount.
GP %	A percentage amount that represents the yearly gross profit goal for this product or budget group. If you complete this field, the system populates the **GP $** field with the corresponding gross profit dollar amount.

   If the total amounts entered in the **Sales $** and **GP $** fields exceed the amounts entered in the **Total Sales $** and **Total GP $** fields, the system alerts you to the discrepancy and updates the yearly totals.

5. Press **Esc** to save the budget and exit the screen.

See Also:

Yearly Sales Goals Overview

Sales Budget Processing Workflow

Copying Sales Budgets from Similar Customers

If you have several customers who have similar buying habits, you can enter a sales budget for one of them, and then copy it to each of the others. Also, if you have a customer who uses some of the budget groups or products that you already entered for another customer, you can copy only those products to the customer's budget, if needed.

This topic includes the following tasks:

- Copying a sales budget.
- Copying product and budget group details.

To copy a sales budget from a similar customer:

1. From the **Files** > **Sales Budgeting** menu, select **Sales Budget Detail Maint** to display the Sales Budget Detail Maintenance screen.
2. In the **Customer** field, enter the name of the individual or company for which to create sales goals. This can be either a bill-to or a ship-to customer.

   If more than one customer matches your entry, a selection list displays. Select the customer name from the list and press **Enter** to return it to the Sales Budget Detail Maintenance screen.
3. In the **Year** field, enter the sales year for which this budget is active. The system populates this field with the current year.
4. In the **Budget Like** field, enter the name of a customer with similar buying habits for which a budget has already been created.

   If more than one customer matches your entry, a selection list displays. Select the customer name from the list and press **Enter** to return it to the Sales Budget Detail Maintenance screen. The system populates the remaining fields with the budget information.

   Note: If you change the goals for the other customer, the system also updates this customer's goals.
5. Add or change products and sales goals, as needed.
6. Press **Esc** to save the budget and clear the screen.

To copy product and budget group details from a similar customer:

1. From the **Files** > **Sales Budgeting** menu, select **Sales Budget Detail Maint** to display the Sales Budget Detail Maintenance screen.
2. In the **Customer** field, enter the name of the individual or company for which to create sales goals. This can be either a bill-to or a ship-to customer.

If more than one customer matches your entry, a selection list displays. Select the customer name from the list and press **Enter** to return it to the Sales Budget Detail Maintenance screen.

3. In the **Year** field, enter the sales year for which this budget is active. The system populates this field with the current year.
4. Use the **Copy From** hot key to display a prompt.
5. At the Copy Items prompt, type **Y** to copy all of the budget details from another customer, or type **N** to select the budget details for a single product or budget group.
6. Press **Enter** to display the Budget Copy screen.
7. In the **Customer** field, enter the name of a customer with similar buying habits for which a budget has already been created.
8. In the **Year** field, enter the budget year from which to copy the information.
9. If you answered **N** at step 5, in the **PN/Group** field, enter the product or budget group whose sales goal information you want to copy to the new budget.
10. Press **Esc** to copy the requested information to the Sales Budget Detail Maintenance screen.
11. Add or change products and sales goals, as needed.
12. Press **Esc** to save the budget and clear the screen for the next entry.

See Also:

Entering Customer Sales Goals

Deleting Customer Sales Budgets

Monthly Sales Goals Overview

You can define monthly sales budget percentage defaults for your company or for a specific customer. When you enter a customer's yearly sales goals, you have the option to break down the sales into a month-by-month budget. If you have set up default values, the system calculates the monthly dollar amounts based on those percentages.

Periodic Fluctuations

If your sales fluctuate by the season or during specific periods, create default monthly sales budget percentages to determine how much product to sell over a specified period. You can create default monthly budgets for your company or for specific customers. If more than one customer uses the same default monthly percentages, the system can update the percentages for each of them simultaneously.

The system determines a customer's monthly percentage goals by looking at the following, in this order:

- The customer's specific monthly goals.
- Your company's standard monthly goals.
- The system's default monthly goals – 12 equal amounts, or 8.33% per month.

If you change the defaults for a customer after you have entered their monthly sales goals, the system does not recalculate the current amounts using the default values. You must correct them yourself.

See Also:

Sales Budget Processing Workflow

Defining Monthly Sales Percentage Defaults

Use the Sales Budget Monthly Defaults screen to define monthly sales percentage goal defaults for your customers or for your company. The screen lists each month of the year, and you can enter a default sales percentage for each month. Set default goals to schedule predictable seasonal sales fluctuations. For example, if your company sells snow blowers, you might set your sales budget percentages higher between September and March, and lower for the rest of the year.

The defaults you set here override the system default of 12 equal amounts, and goals set for specific customers override those set at the company level.

Depending on your system setup, the months are ordered by either the calendar year or the fiscal year.

To define monthly sales percentage defaults:

1. From the **Files** > **Sales Budgeting** menu, select **Sales Budget Monthly Defaults** to display the Sales Budget Monthly Defaults screen.
2. In the **Customer** field, enter the name of the customer whose sales budget defaults you want to create. This can be either a bill-to or a ship-to customer.

   If more than one customer matches your entry, a selection list displays. Select the customer name from the list and press **Enter** to return it to the field.

   Note: To create sales defaults for your company, leave this field blank.

3. For each month, in the **Percentage** column, enter the percentage of the total sales budget to budget for that month, as needed.

   If you do not specify percentages, the system calculates the percentages across 12 months, or **8.33%** per month.

   Note: The system recalculates the **Totals** field each time you change a percentage. You cannot exit the screen unless the total equals **100**.

4. Press **Esc** to save the information and exit the screen.

More Options for Working with Monthly Sales Percentage Defaults

The Sales Budget Monthly Defaults screen also offers these options:

To...	Use this hot key...
enter or edit sales goals for the customer	**Detail** The Sales Budget Detail Maintenance screen displays.
remove the percentage defaults for the customer	**Delete** A prompt displays. Enter **Delete** to clear the screen.

Entering Monthly Sales Goals

Use the Monthly Budget screen to set monthly sales goals for a customer, either for a product or for a budget group. If you set monthly goal defaults beforehand for the customer or your company, you can use this screen to override those preset goals.

Depending on your system setup, the months are ordered by either the calendar year or the fiscal year.

Note: If you use the **Monthly** hot key, the system creates monthly budgets for the product or budget group. To remove the monthly budget, re-enter the amounts in the **Sales $** and **GP $** fields on the Sales Budget Detail Maintenance screen.

This topic includes information about:

- Entering monthly sales goals for a product or budget group.
- Copying monthly sales goals from another customer.

To enter monthly sales goals for a product or budget group:

1. From the **Files > Sales Budgeting** menu, select **Sales Budget Detail Maint** to display the Sales Budget Detail Maintenance screen.
2. Locate the customer whose budget you want to create.
3. Add products/budget groups and their corresponding sales goals.
4. Select a product or budget group and use the **Monthly** hot key to display the Monthly Budget screen.

   If defaults have been defined for the customer or for your company, these display in the **Sales $** and **GP $** fields. Otherwise, the system splits the selected amount into 12 equal amounts. For more information about how the system determines the values, see the Monthly Sales Goals Overview.
5. For each month, in the **Sales $** field, enter the dollar amount of the monthly sales budget goal for the selected product or budget group, if needed.
6. In the **GP $** field, use the **GP Perc** hot key to display a prompt.
7. At the **Enter GP%** prompt, type the percentage of profit you expect to generate from sales of this product or budget group.
8. Press **Enter** to return to the Monthly Budget screen. The system calculates the gross profit and populates the **GP $** field with this amount.

   Note: You can also just enter a gross profit dollar amount in the **GP $** field, if you prefer.
9. Press **Esc** to return to the Sales Budget Detail Maintenance screen. The system uses an asterisk (*) to identify products or budget groups that have monthly sales goals.

To copy monthly sales goals from another budget:

1. From the **Files > Sales Budgeting** menu, select **Sales Budget Detail Maint** to display the Sales Budget Detail Maintenance screen.
2. Locate the customer whose budget you want to create.
3. Add products/budget groups and their corresponding sales goals.
4. Select a product or budget group and use the **Monthly** hot key to display the Monthly Budget screen.
5. Use the **Copy From** hot key to display the Budget Copy screen.
6. In the **Customer** field, enter the name of a customer with similar buying habits for which a monthly budget has already been created.
7. In the **Year** field, enter the budget year from which to copy the information.
8. In the **PN/Group** field, enter the product or budget group information to copy to the new budget.
   - To copy sales goals for a product, enter a descriptive keyword and press **Enter** to display a selection list. Select the product and press **Enter** to return it to the field. See Searching for Products for other methods.
   - To copy sales goals for a budget group, enter **/** (forward slash) followed by all or part of the budget group name. If more than one group matches your entry, a selection list displays. Select the group and press **Enter** to return it to the field. To display a list of budget groups, enter **/** (forward slash) and press **F10**.
9. Press **Esc** to copy the requested information to the Monthly Budget screen.
10. Press **Esc** to return to the Sales Budget Detail Maintenance screen. The system uses an asterisk (*****) to identify products or budget groups with monthly sales goals.

See Also:

Monthly Sales Goals Overview

Calculating Monthly Sales Budget Amounts

Sales Budget Processing Workflow

Calculating Monthly Sales Goals

Use the Calculate Monthly Budgets screen to calculate monthly sales goals for multiple customers. You select:

- The formula the system uses to calculate the budgets
- Which customer budgets to calculate

You can run the calculations now or schedule them to run overnight. The system notifies you through the message system when the calculations are complete. Using this feature prevents you from having to drill down into each budget to set the monthly sales budget amounts.

To calculate monthly sales goals for a customer:

1. From the **Files** > **Sales Budgeting** menu, select **Sales Budget Monthly Calculations** to display the Calculate Monthly Budgets screen.
2. In the **Year** field, enter the year for which to calculate monthly sales budgets.
3. Do one of the following:

To...	Do this...
calculate the monthly budget now	use the **Begin** key. If prompted, select a printer and press **Enter** to calculate the monthly budget amounts.
schedule the calculations to run later	use the **Opts** hot key to display the Options selection list. Select **Scheduling** to display the Phantom Scheduler screen.

More Options for Calculating Monthly Budgets

The Calculate Monthly Budgets screen also offers these options:

To...	Use this hot key...
limit the calculations to specific customer budgets	**Select** The Budget Queue Selection screen displays.
enter the formula to use to calculate the customer sales budget amounts	**Formula** The Sales Budget Formula screen displays.

See Also:

Monthly Sales Goals Overview

Sales Budget Processing Workflow

Monitoring Customers' Sales Budgets

Sales Budget Maintenance Overview

Authorized users can track actual sales for customers and compare them to projections. Use this information to determine:

- Whether your salespeople are meeting their sales goals.
- Where to focus your sales efforts.

Sales Budget Queue

Use this feature to:

- View and edit sales budgets for multiple customers.
- Limit the number of customers for which to compare budgeted and actual sales amounts.
- Create or update budgets for the next year.

In addition to comparing a selected year's actual sales with budgeted amounts, you can also compare that year's sales and budget to the previous year's sales and budgets. For example, if you view the budget for 2001, those figures display in the TY (This Year) fields, and the figures for 2000 display in the LY (Last Year) fields.

Sales Budget Analysis

Run the Sales Budget Analysis Report to print the list of budgeted sales and actual sales. The system uses the same selection criteria used to search in the queue for selecting report parameters. In addition, you can choose to view sales budget information for a specific period, such as the third quarter of your fiscal year.

See Also:

Sales Budgeting Overview

Sales Budget Processing Workflow

Monitoring Customers' Sales Budgets

Monitoring Customer Sales Budgets

Use the Sales Budget Queue screen to compare your customer's sales goals with their actual sales. If you have the BUDGET.QUEUE authorization key assigned, you can also increase or decrease your sales projections to more accurately reflect current trends.

This topic shows how to:

- View budgeted and actual sales figures.
- Update a customer's sales budget.

To view budgeted and actual sales figures:

1. From the **Files** > **Sales Budgeting** menu, select **Sales Budget Queue** to display the Sales Budget Queue screen.
2. In the **Budget Year** field, enter the last two digits of the year for which to review sales budgets to display the Budget Queue Selection screen.

   Note: The information that displays in the This Year (**TY**) columns refers to the year you enter in this field, which may not be the same as the current year.

3. Filter the list of sales budget records, as needed.
4. Review the following fields, as needed:

Field	Description
Customer*	The names of companies that have purchased goods or services during the year.
LY Actual*	A dollar amount that represents last year's actual sales for the selected customer.
TY Actual*	A dollar amount that represents this year's actual sales to date for the selected customer.
LY Budget*	A dollar amount that represents last year's sales goal for the selected customer.
TY Budget	A dollar amount that represents this year's sales goal for the selected customer.
TY GP$*	A dollar amount that represents this year's gross profit dollars goal for the selected customer.
Budget Total*	The total sales goals for the year, and the total profit anticipated as a result of those sales.

   ***View-Only**

   Note: The system updates the figures on the Sales Budget Detail Maintenance screen based on the values you entered here, if any. To update the monthly figures, see Calculating Monthly Sales Goals.

5. Press **Esc** to exit the screen.

To update a customer's sales budget:

1. View the customer's sales budget amounts.
2. In the **TY Budget** field, enter a dollar amount that better represents the total sales budget goal for this customer for the selected year.
3. In the **TY GP$** field, enter a dollar amount that better represents the total gross profit budget goal for this customer the selected year.
4. Press **Esc** to save the budget amounts and clear the screen.

   Note: The system updates the figures on the Sales Budget Detail Maintenance screen based on the values entered here. To update the monthly figures, see Calculating Monthly Sales Goals.

More Options for Working with Sales Budgets

The Sales Budget Queue screen also offers these options:

To...	Use this hot key...
change the selection criteria	**Select** The Budget Queue Selection screen displays.
to resort columns by customer, or by ascending or descending actual or budget amounts for this year	**SortBy** The Budget Queue Sort selection list displays. Select the column by which to sort the information and press **Enter**.
edit the sales budget for a selected customer	**Detail Budget** The Sales Budget Detail Maintenance screen displays.
change the sales budget calculation formula	**Formula** The Budget From selection list displays.

See Also:

Sales Budget Maintenance Overview

Sales Budget Processing Workflow

Filtering Sales Budget Records

Whether you are calculating new monthly sales goals or merely monitoring your sales budgets, you may want to filter the list of sales budget records to view or calculate budgets for specific records.

To filter the list of sales budget records:

1. Do one of the following to display the Sales Budget Queue Selection screen:
   - From the **Files > Sales Budgeting** menu, select **Sales Budget Queue** to display the Sales Budget Queue window. In the **Budget Year** field, enter the year for which to view sales budgets.
   - From the **Files > Sales Budgeting** menu, select **Sales Budget Monthly Calculations** to display the Calculate Monthly Budgets screen. In the **Year** field, enter the year for which to calculate monthly sales budgets. Use the **Select** hot key.
2. Complete any of the following fields to filter the sales budget records:

Field	Description
Inside Salesperson	To list only those budgets associated with a particular inside sales representative, enter that person's User ID in this field.
Outside Salesperson	To list only those budgets associated with a particular outside sales representative, enter that person's User ID in this field.
Home Branch	The branch to which the customer is assigned, and from which they purchase most items.
Home Territory	The territory to which the customer is assigned, and within which they purchase most items.
Customer Type	The industry in which the customer works.
Customer Select Code	The type of business in which the customer engages.
SIC Code	A four-digit code originally developed by the Office of Management and Budget to facilitate statistical economic analysis and reporting of the state of the U.S. economy based on enterprises engaged in production, trade, and service.
Bill-To or Ship-To	Determines whether to show sales budgets for the customer's Bill-To address (default value) or Ship-To address.
Custs w/ no Budget	To show all customers, regardless of whether they have a sales budget, enter **Y**; otherwise, enter **N**.

3. Press **Esc** to exit the dialog box.

Changing the Sales Budget Calculation Formula

You can use formulas to update budgets for one or more customers. With a formula, you can adjust a budget by a certain dollar amount or a certain percentage. For instance, you can increase all of this year's budgets by 10% over last year's budgets. *This year* is the year you specify, *last year* is always the year prior to the specified year.

Applying a formula to multiple budgets is much faster than opening and editing the Sales Budget Detail Maintenance screen for each customer. This instruction shows how to apply formulas to selected budgets from the Calculate Monthly Budgets screen, but you can also do so from the Sales Budget Queue. The system uses the message system to notify you when the formula calculations are complete.

To calculate customer sales budgets:

1. From the **Files > Sales Budgeting** menu, select **Sales Budget Monthly Calculations** to display the Calculate Monthly Budgets screen.
2. In the **Year** field, enter the year for which to calculate monthly sales budgets.
3. Filter the list of sales budget records, if needed.
4. Use the **Formula** hot key to display the Budget From selection list.
5. Select whether to create a budget from this year's actual sales or last year's actual sales and press **Enter** to display the Sales Budget Formula screen.
6. In the **Formula for Budgeted Sales** field, enter the formula to apply to the selected sales amount (This Year Actual or Last Year Actual). The system uses this formula to calculate the new budgeted sales amount. For example, to set the budget at 5% more than the actual sales, enter ***1.05** in this field.
7. In the **Formula for Budgeted GP%** field, enter the formula to apply to the selected gross profit percentage (This Year Actual or Last Year Actual). The system uses this formula to calculate a new gross profit percentage for the new budget. For example, to increase the gross profit percentage by 2% for the new budget, enter **+0.02** in this field.

   Note: You cannot enter a formula for the **Budgeted GP%** field only.

8. If you accessed this screen from the Sales Budget Queue, in the **Apply Formula to All Customers** field, to apply the formulas to all customers, enter **Y**. If you enter **N**, the budget applies only to the customer on which the cursor resides on the Sales Budget Queue screen.

   Note: If you accessed this screen from the Calculate Monthly Budgets screen, the system applies the formula to all customers regardless of the value in this field.

9. Press **Esc**. to save the information and exit the screen.

   Note: If the system calculates any negative amounts, it updates those budget amounts to be **0** (zero).

Running the Sales Budget Analysis Report

Run the Sales Budget Analysis Report to compare your sales budgets to actual sales figures. The report provides information similar to that which displays in the Sales Budget Queue, but gives you added control over reporting date ranges and details.

The report includes all budgets for selected customers, not only those budgets with actual sales. If you use budget groups, the report subtotals on them; otherwise, it reports on the total sales goal. The report does *not* include miscellaneous charge items, such as service charges.

Note: The sales budget can be set up on a per customer basis and can also be set up on a per budget group basis. Because of this, the totals for the customer and the totals for the budget group are calculated separately and may not match.

To run the Sales Budget Analysis Report:

1. From the **Files** > **Sales Budgeting** > **Reports** menu, select **Sales Budget Analysis** to display the Sales Budget Analysis Report screen.
2. In the **Start Date** field, enter the first date in a range of dates for which to view customer sales budgets. This field supports variable dates.
3. In the **End Date** field, enter the last date in a range of dates for which to view customer sales budgets. This field supports variable dates.
4. Complete any of the following fields, as needed:

Field	Description
Select and Sort By	The type of sales representative (inside or outside) to use to select and sort the customer sales budgets, as needed. Each customer has sales representatives assigned in Customer Maintenance.
Page Break on Customer (Y/N)	To display each customer's sales budget information on a separate page, enter **Y**; otherwise, enter **N**.
Salesperson	To list budgets for a specific sales representative, enter the person's user ID. To list budgets for several sales representatives, use the **Multi** hot key to display the Salespeople Selection screen. See Using Multiple Values Hot Keys.
Bill-To/Ship-To	Indicates whether to report based on the customers' shipping or billing account.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Detail/Summary</td><td>Indicates whether to view budget details or only a summary of each budget on the report.
Valid values include:
• Detail – Prints multiple lines of data on the report for each selected customer, one for each budget group and product for which a budget amount exists.
• Summary – Prints one line of data on the report for each selected customer, representing all of the budget groups and products for which a budget amount exists.
Both reports include columns and grand totals, including:
• Customer name.
• Actual sales amounts and actual gross profit dollars (GP$) to compare against the budgeted sales amounts and budgeted gross profit dollars.
• The difference between actual and budgeted sales amounts. The system displays this both as amounts (Sls Diff) and as percentages (Diff%). The system also displays the same difference in gross profit dollars as amounts (GP$) and as percentages (Diff%).</td></tr>
<tr><td>Customers with no Budget</td><td>To include customers on the report for which no budgets exist, but for which you have recorded sales within the selected date range, enter Include; otherwise, enter Exclude.</td></tr>
<tr><td>Display all Budget Groups (Y/N)</td><td>To include all budget groups on the report, even if no sales have been entered for them, enter Y; otherwise, enter N.</td></tr>
</table>

5. Set options, if needed, and generate the report.

   If you use either the **Print** or **Hold** hot key, depending on your authorization level, the system may prompt you to choose whether to view generic (commission) costs, COGS, or no costs on the report. Select an option and press **Enter** to run the report.

See Also:

Sales Budget Maintenance Overview

Sales Budget Processing Workflow

Deleting Customer Sales Budgets

If needed, you can delete a sales budget you entered in error. For example, if you added one product and meant to enter a different one, you can remove that product from the budget, or you can delete the whole budget and start over.

To delete a sales budget:

1. From the **Files > Sales Budgeting** menu, select **Sales Budget Detail Maint** to display the Sales Budget Detail Maintenance screen.
2. In the **Customer** field, enter the name of the individual or company for which to create sales goals. This can be either a bill-to or a ship-to customer.

   If more than one customer matches your entry, a selection list displays. Select the customer name from the list and press **Enter** to return it to the Sales Budget Detail Maintenance screen.
3. In the **Year** field, enter the sales year for which this budget is active. The system populates this field with the current year.
4. Do one of the following:
   - To delete a product or budget group from the budget, position the cursor on it and press **Alt-Delete**.
   - To delete the entire budget, use the **Delete** hot key. Confirm the deletion at the prompt to clear the screen for the next entry.

See Also:

Entering Customer Sales Goals

Copying Sales Budgets from Similar Customers

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