budget control
accelerator

Quickly achieve additional budgetary compliance and control in your Dynamics system.

If you are responsible for setting, controlling and managing budgets in your organization, you will recognize these issues:

"Our standard system does not reflect the controls we want to put in place. We are constantly back-checking and running reports which isn't productive."

"We prefer alerting and informing rather than actual blocking that halts business activity until the completion of the budget. We need this flexibility."

"As a finance manager, I wish to examine actual budgets at any given moment, and prevent LoBs having to cancel purchase orders that have exceeded the budget."

Why choose Prodware to support your budget control needs in Dynamics 365

Prodware has developed and implemented Dynamics projects across Europe.
Our experienced R&D team work closely with our clients to develop additional functionalities that suit their own budgetary control needs.

The Budget Control accelerator extends control of the budget beyond the 'Analyzing Actual Amounts Versus Budgeted Amounts' provided by standard Dynamics:

- Values of Purchase Journals and Open & Released documents added in Standard "Analyzing Actual Amounts Versus Budgeted Amounts" view

- FactBox added to Purchase Journal, General Journals, PO and Purchase Invoice screens to show current budget via three different budget levels

- Ability to export Actual Amounts and Budgeted Amounts, including Purchase Journals, General Journals and Open and Released documents' values

- Added approvals functionality with the help of workflows to boost productivity further

- Out of the box for Business Central

- Ready to use and to adapt, Power BI Templates with budget control data allow you to analyze key metrics on your own Budget Control dashboard

Additional fiscal control

If a user tries to post a Purchase Journal or release a Purchase Order that exceeds the budget entered into the system, then the system will alert or prevent them from releasing the PO. The user receives an alert or denial message, and can then attempt to solve the issue, but the budget is never compromised.
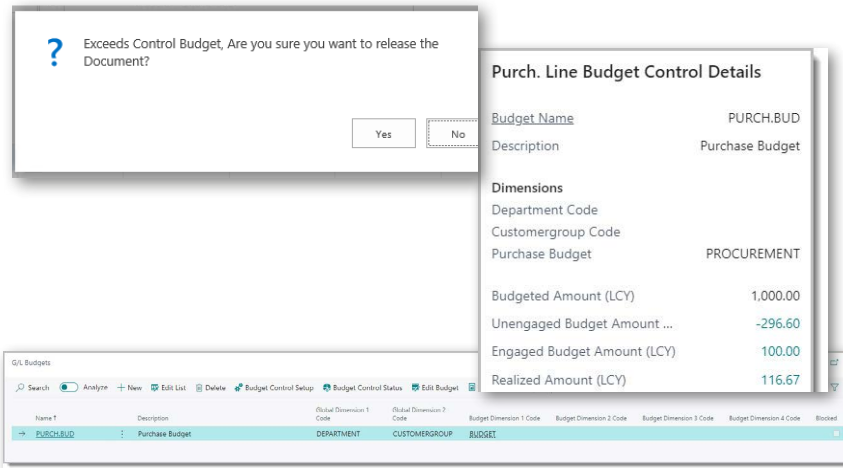
Flexible to your needs

- Set up budget blocking levels, select calculation types and check purchase transactions against available budgets

- By viewing the budget image at multiple levels, it is possible to decide that even when a particular item exceeds within that group, an order can be approved as the balance of the budget is positive for the entire group

Improved financial visibility

Finance management has access to the status of all the budgets in the system. They benefit from multiple views of budget control versus actual performance, work with complex account charts and expenses.

Purch. Line Budget Control Details

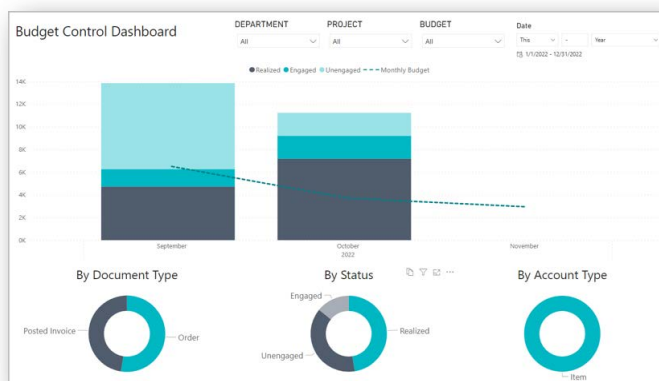|	
Budget Name	PURCH.BUD
Description	Purchase Budget
Dimensions	
Department Code	
Customergroup Code	
Purchase Budget	PROCUREMENT
Budgeted Amount (LCY)	1,000.00
Unengaged Budget Amount ...	-296.60
Engaged Budget Amount (LCY)	100.00
Realized Amount (LCY)	116.67

Control the available budget on the Purchase Order and Invoice

A Fact Box on the Purchase Journal, purchase Invoice and Purchase Order screens is now available, which displays the status of the available budget.

The user can view information regarding the status of the available budget for the account for which an invoice or purchase order or a Purchase Journal has been created.

The mechanism provides a picture of the available funds, considering the structure of the chart of accounts, which is built and sometimes budgeted at a master account level (Expense Type, Top Expense), rather than at the single account level of type Posting.

Power BI Templates

Create your own Budget Control Dashboard so you can view repartition by Document Type, by Status, etc.

Future proof

Certified for Microsoft AppSource, the solution is available for free trial or online purchasing

Secure

Built on a strong and customisable security model that gives your users the guidance they need and your IT team the assurance of compliance

Speak to Prodware about getting your Dynamics system fully aligned with your own budget management needs.

prodware

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