
DSM520 Budget Maintenance

Overview

Sales budgets can be defined, maintained and created for any of the Sales Analysis sales level defined in Sales Analysis Summary Levels Definition file.

This program is used for the direct entry and maintenance of the budget quantity amount and Gross Profit entries for a particular financial year, by the selected sales analysis level and accepts multiple budget types. It then updates the budget into the Sales Analysis History file.

Examples

This section illustrates examples concerning:

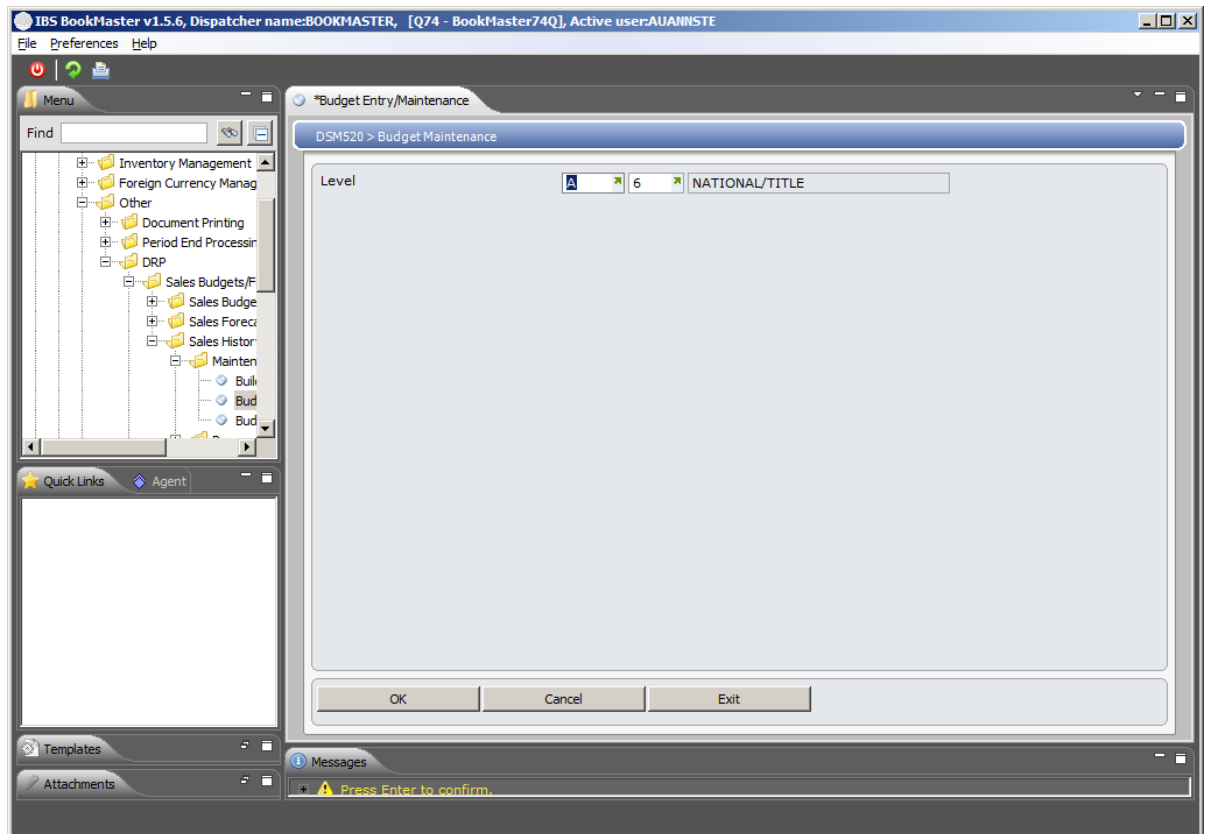
[Example 1: To Maintain Budget](#)

Example 1: To Maintain Budget

This example describes how to maintain budget by direct entry.

1. Select option Budget Entry/Maintenance from Base Modules> Distribution> Other> DRP> Sales Budgets/Forecast> Sales History Budget Summary> Maintenance menu.

DSM520 Budget Maintenance panel is displayed.

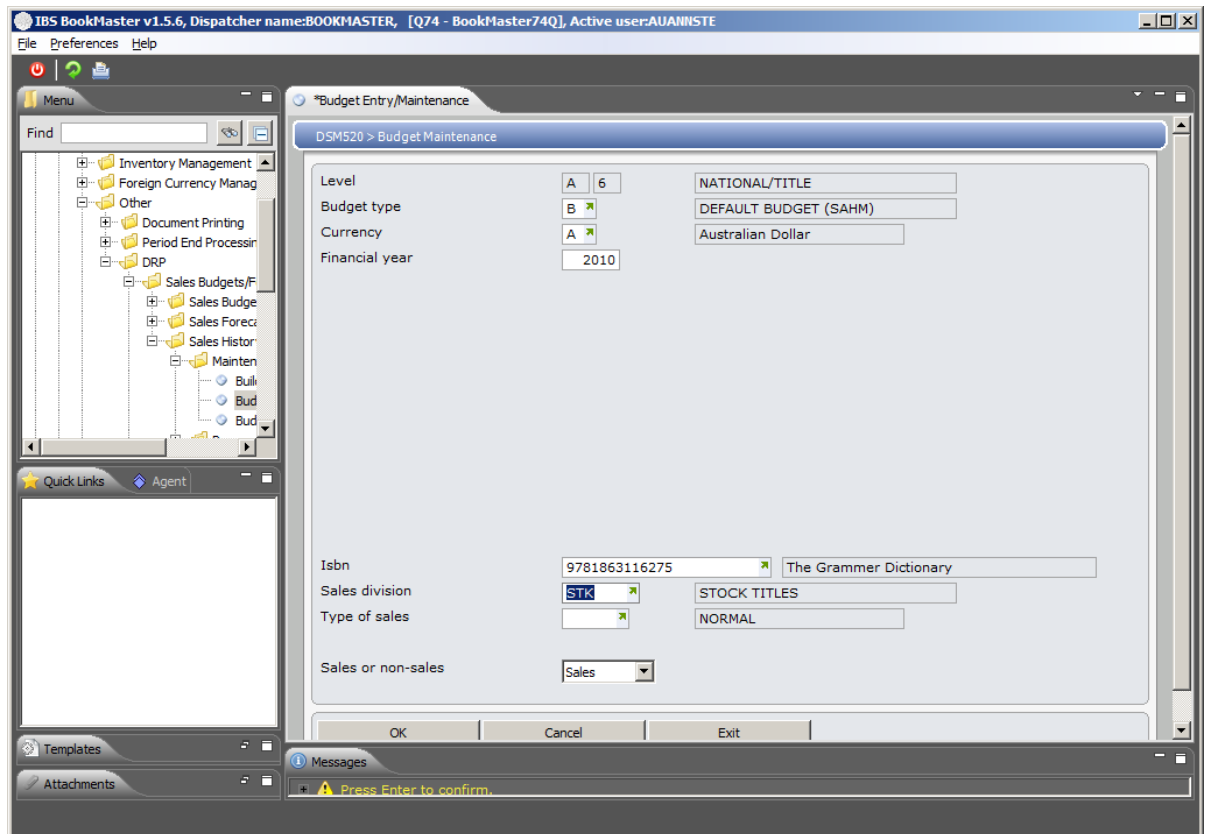


Relevant Fields

Level

This is customer/item classification level for which budget is to be created.

2. Select level for which budget is to be created and click **OK** to confirm the selection. Following header panel to maintain budget is displayed. Fields displayed are depend upon level selected.



Relevant Fields

Budget type

The Budget Type defaults to the first record in **TMSDS/SA-BDGET**.

Currency

The currency in which budget is to be created defaults but can be overridden.

Financial year

The financial year defaults to current financial year and can be overridden.

Customer level 1 – 5

The customer to which the budget is applicable, for customer level 1 – 5.

Customer

The customer to which this budget is applicable.

Item Level 1 – 5

The item to which the budget is applicable, for item level 1 – 5.

Item

The item to which this budget is applicable

Sales division

The sales division defaults to NA=Not Applicable and can be overridden. Sales divisions are used to classify items into various groups relating to the item's life cycle. For example: New item, stock item, backlist, etc.

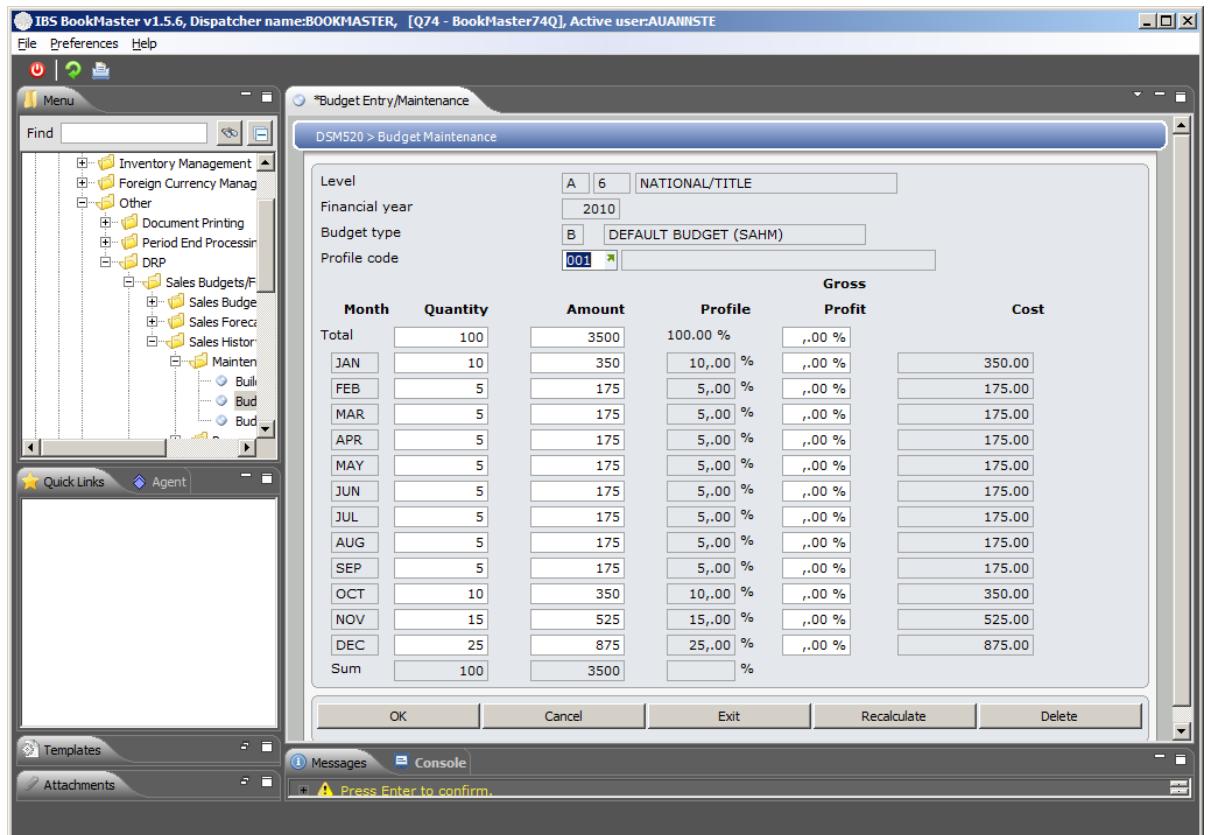
Type of sales

Type of sales defaults to NS=Normal but can be overridden.

Sales or non sales

Indicate whether you want to display the budget by sales or non-sales. Non-sales will display budget figures for areas such as advertising, rebates, promotional giveaways, etc.

- Key in all required fields and click **OK** to confirm the changes to the header. Once the selection criteria has been entered and confirmed, the budget quantity, amount and gross profit over a period of 12 months is displayed.



Functions

Recalculate

This function is used to recalculate the sum. This override any changes made to any specific months.

Delete

This function is used to delete the sales information.

Relevant Fields

Profile code

The forecasted/budget values can be broken down over a 12 month period. The percentage breakdown for each month is stored in a Profile ID. This takes into account any seasonal peaks and troughs.

A profile code is also used to break down the adjusted annual demand over a period of months. This percentage break down calculates correct, expected demand quantities for the purchase period. Here, profile code is optional. If no profile is entered, the monthly allocation defaults to even spread.

Month total

If a total amount is not entered, the total is allocated based on the profile. This can be overridden if calculated from the profile.

Month quantity

This is the quantity of products expected for demand for the monthly period. At least one quantity for a month must be entered.

Month amount

The amount of demand expected for the products for the monthly period. At least one amount for a month must be

entered.

Gross profit %

An optional entry of the gross profit % expected for each month.

Cost

The cost is calculated based on the gross profit percentage entered.

Sum

The sum is calculated and is display field only.

4. Key in all required fields or make necessary changes. Click function **Recalculate** to calculate cost. Click **OK** to confirm the changes. This completes the process of direct budget entry.