



Slide 1

Slide notes: The 'En Masse' function is most useful and powerful for performing Budget actions on many Accounts at the same time.



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Slide notes: This option is not usually available to lots of Users, but rather to 1 or 2 Accountants who may perform mass Budget actions.



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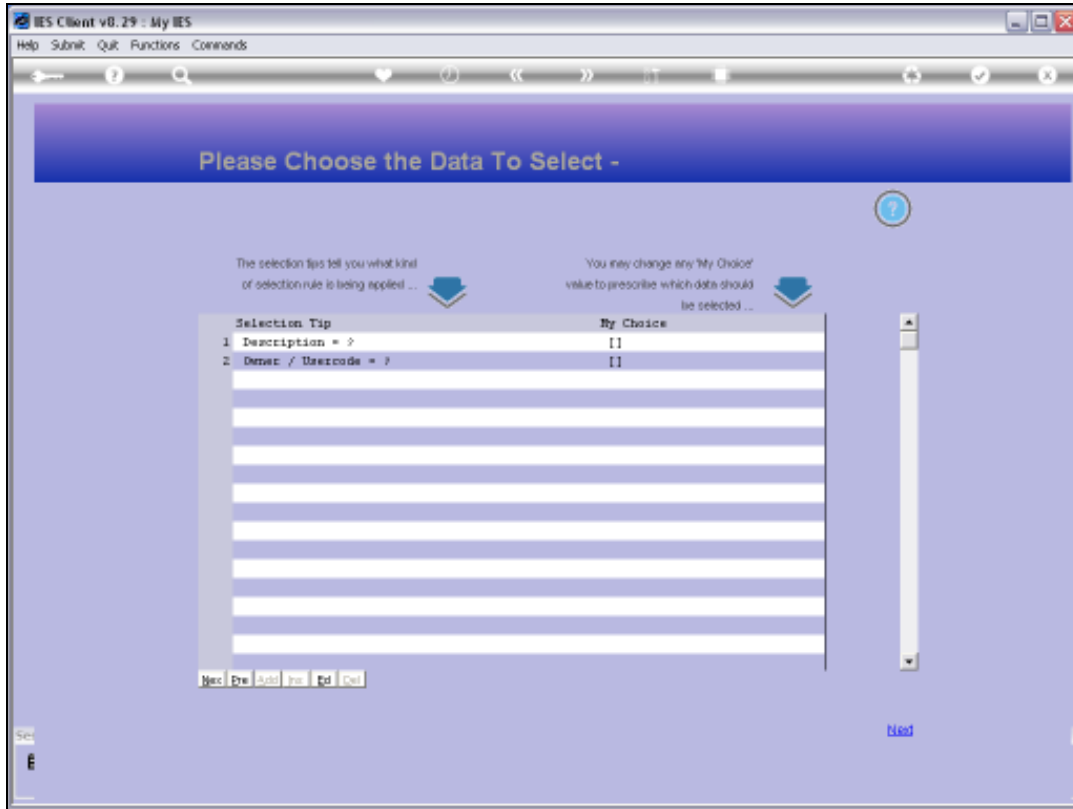
Slide notes: Typically, we will use an existing Data Selector that will select a series of Accounts from the General Ledger, and then we perform a selected action on all of these Accounts.



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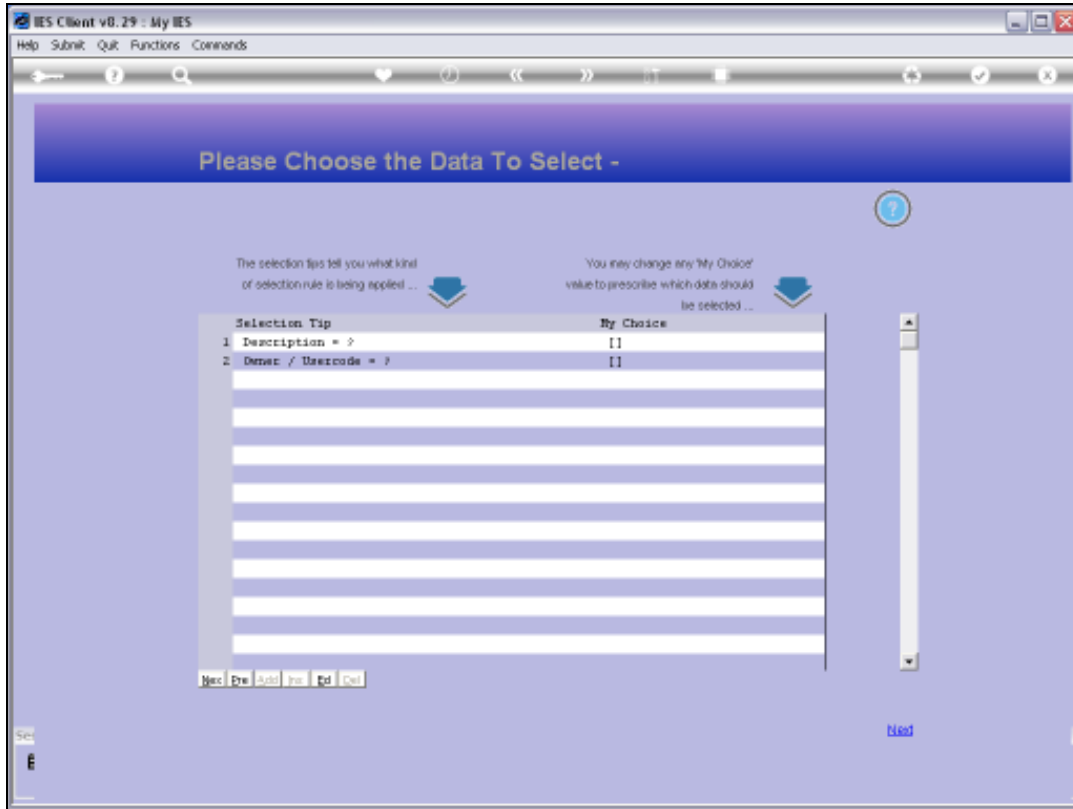


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Slide notes: The lookup allows us to find a Data Selector that operates on the GL, because the Accounts we use in the Budget are all GL Accounts.



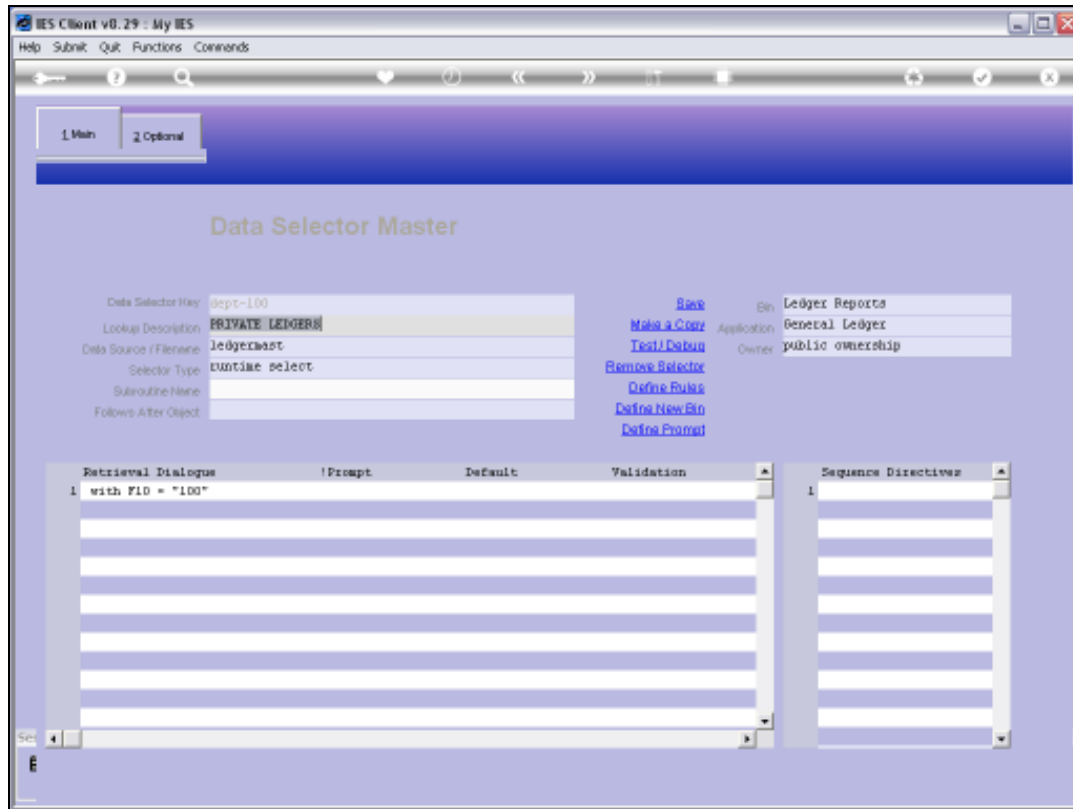
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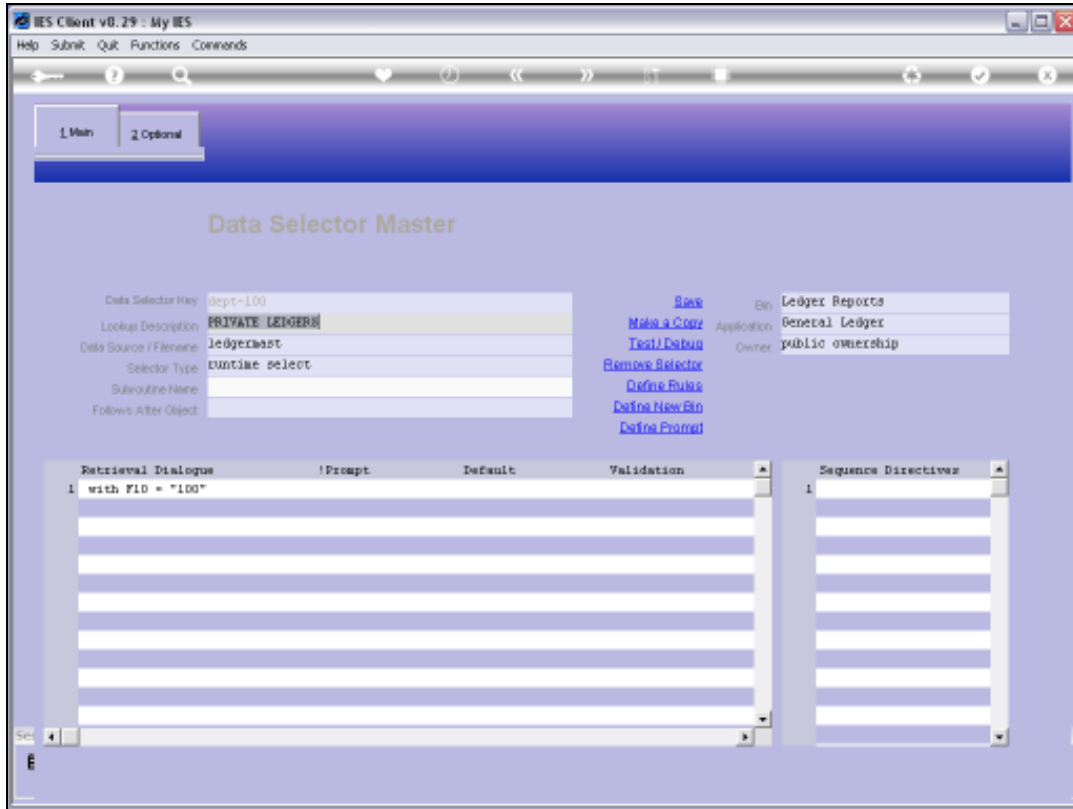


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Slide notes: Once we have entered the target Data Selector, we may just exit, because the system has noted which Data Selector we wish to use.



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Slide notes: Now, we have an opportunity to view the list of Accounts that have been selected, just to be sure they are all Accounts that we are happy to do a mass update on. If we are already sure of the Account Selection, then we can skip this step and just proceed.



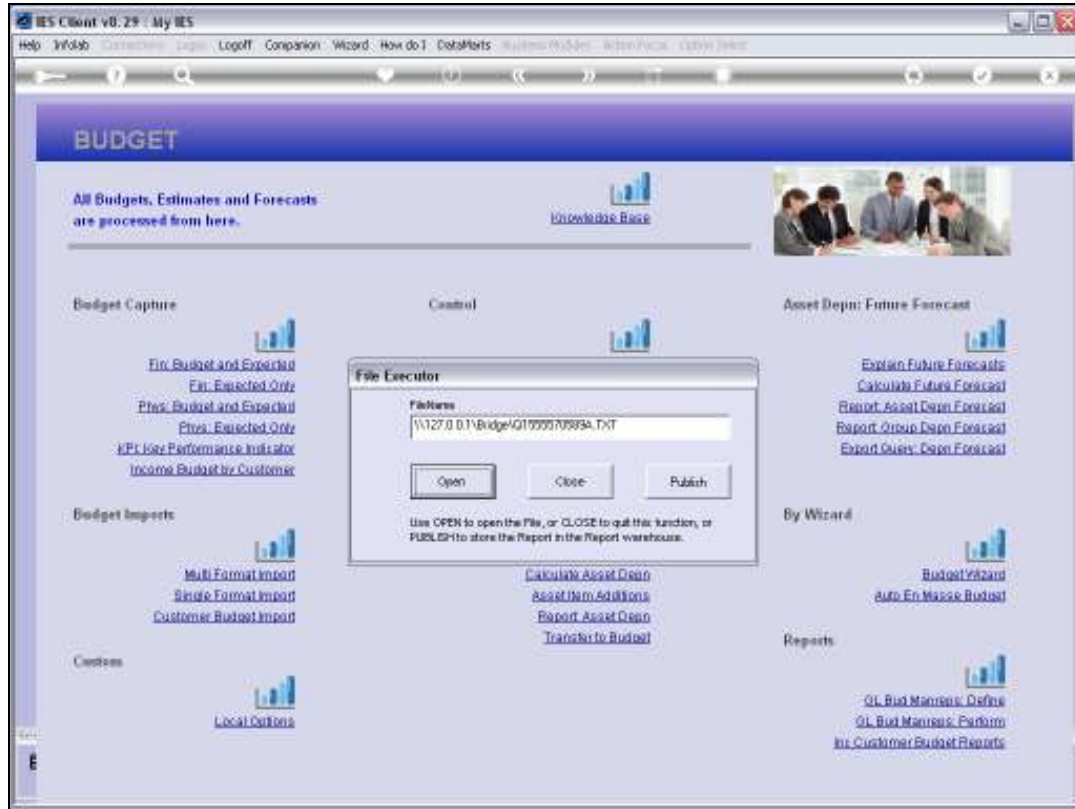
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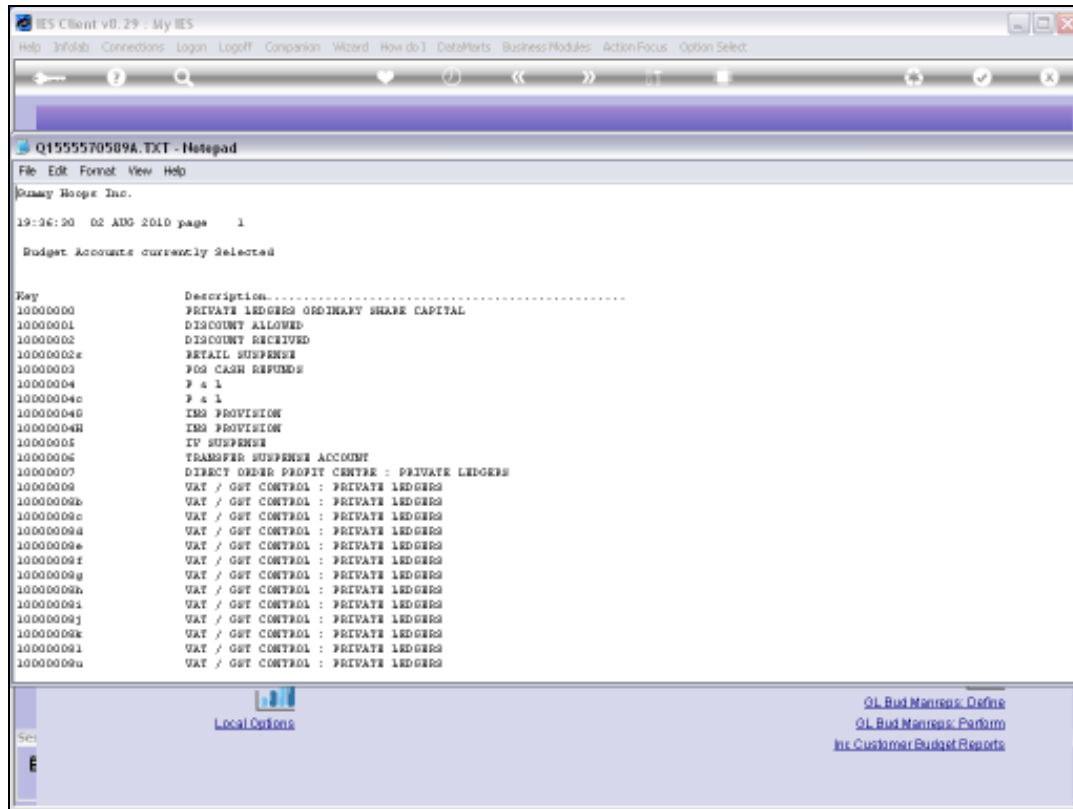
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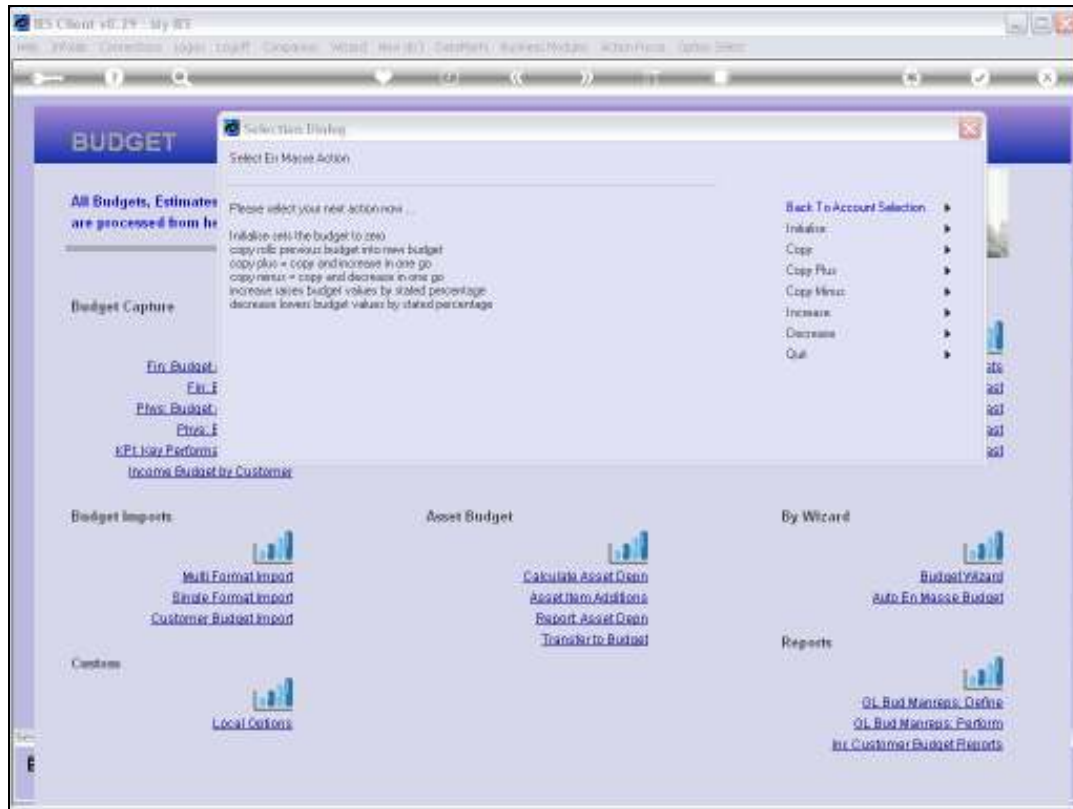


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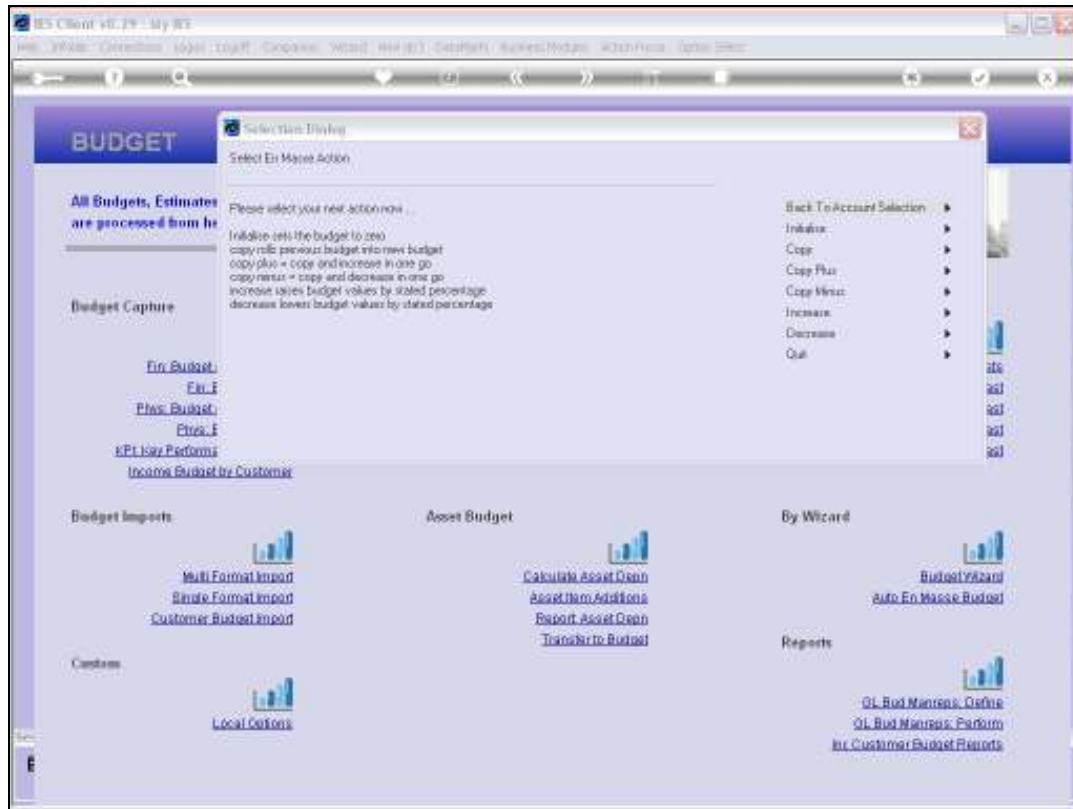
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Slide notes: For the sake of this example, we are now viewing the list of selected GL Accounts. All Accounts on the list will be updated with the action we choose to perform.



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Slide notes: Next, if we are not 100% happy with the Accounts that were selected, then we can return to a new Account Selection. Otherwise, we can now choose an action that we would normally choose on a Budget Screen where we work with 1 Account at a time, and then in this case, we can perform the action on any number of Accounts that we have selected, all in 1 go. Think of it, with this method it is possible to complete the entire Company Budget in 20 seconds by copying and increasing the Budget by a stated percentage, for all GL Accounts! Of course, we will only do that if our needs are that straight forward.



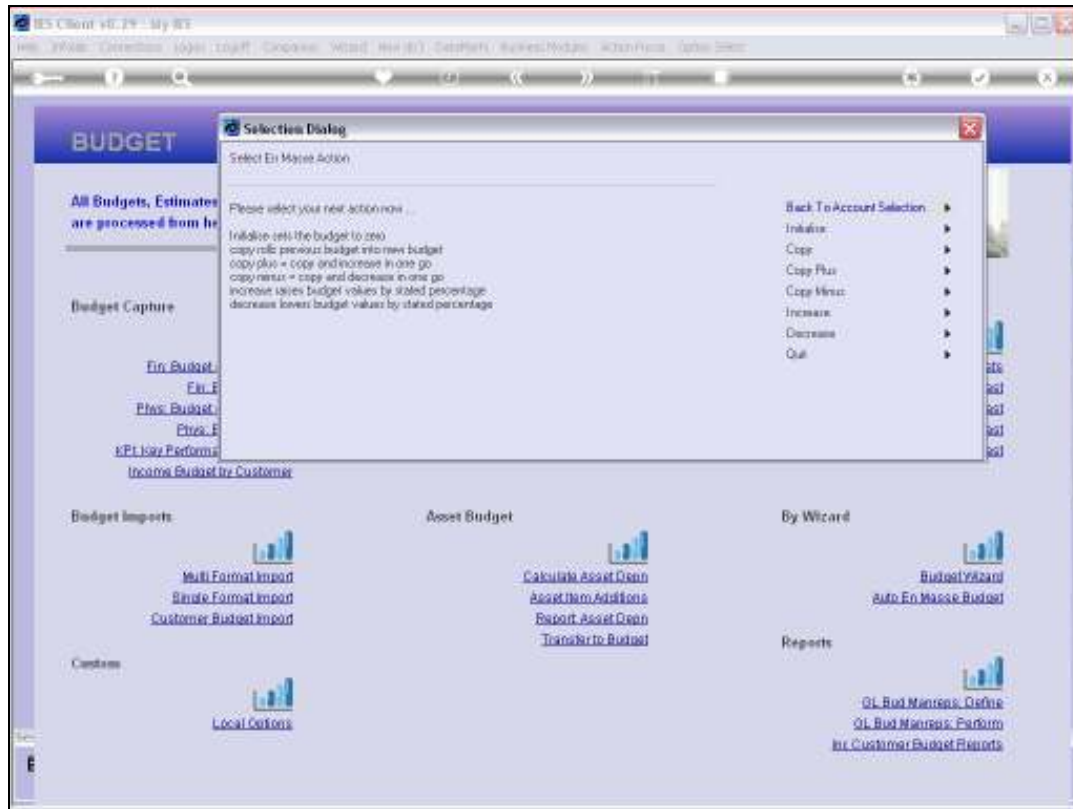
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Slide notes: So, for our example, we will use the COPY function. That means that for all the selected Accounts, in each case, the system will see if there is a Prior Budget for the Account, and will then copy it also to the new Budget for the same Account.



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Slide notes: The action is subject to Budget Profiles if they are active. At this stage, we can still quit, but if we choose 'next' then the Action is performed.



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Slide notes: And it's done! Now we can choose our next Action, based on the same Account Selection or by returning to a new Account Selection and going from there. For any action we choose to perform, the wizard will guide us accordingly.



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