



## Budgets Training

[Play Video](#)

Company: \_\_\_\_\_ Signed: \_\_\_\_\_

Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

**Trainee to complete: Please tick**

1. [ ] **Define a Budget**  
How do you define a budget?
2. [ ] **Budget on**  
What 2 things can you create budgets on?
3. [ ] **Periods**  
How do you define over what time the budget is for?
4. [ ] **Departments**  
Where do you choose which departments the budget is for?
5. [ ] **Descriptions**  
Can you alter the amount headings?
6. [ ] **First Period**  
Where do you setup the first period?
7. [ ] **For a Job**  
How do you activate the budget for a job?
8. [ ] **Values for a Period**  
Do you understand that you are loading the values for just this period?
9. [ ] **Copying Across Periods**  
Do you know how to copy these values to all of the periods?
10. [ ] **Budget Definition List**  
Where can you view all of your defined budgets?
11. [ ] **Budget List**  
Where can you view your actual budgets?
12. [ ] **View All**  
How do you display all of your periods for each budget?
13. [ ] **Viewing Each Period**  
Can you open each period?
14. [ ] **Adjusting Individually**  
Can you open each period and adjust it?
15. [ ] **Budget Variation**  
How do you make a variation to the budget using the variation screen?

16.[ ] **Profit and Loss**  
How do you add a budget to your Profit and Loss?

17.[ ] **Account List**  
Can you see which accounts have a budget set against them?

18.[ ] **Budget v Actual**  
Can you see the budget in a list form?

19.[ ] **Job Budgets**  
Where do you view the budget with a job ?

**Notes:**

**Are there any aspects in this area that more training would be useful?**

---

---

---

---

---

---

---