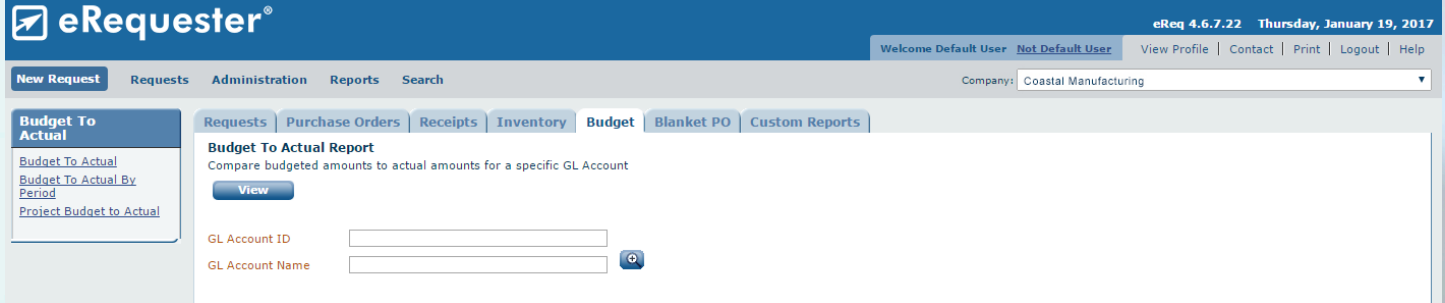


# BUDGET CONTROL OVER SPENDING

## INCREASED VISIBILITY OVER RESOURCES



The screenshot shows the eRequester web application interface. At the top, there is a navigation bar with the eRequester logo, user information (Welcome Default User, Not Default User), and links for View Profile, Contact, Print, Logout, and Help. The date is Thursday, January 19, 2017. Below the navigation bar, there are tabs for Requests, Administration, Reports, and Search. A dropdown menu shows the company as Coastal Manufacturing. The main content area is titled "Budget To Actual Report" and includes a "View" button. Below the button are input fields for "GL Account ID" and "GL Account Name".

## Get a Better View into Your Organization's Current Spending

The eRequester Budget Control Module is an excellent means for tracking and controlling expenditures through an easy-to-use interface. Tracking budgets is key for many organizations, eRequester handles this through user and approver permissions allowing insights into budget to actual comparisons down to the line item and crucial budget alerts.

- ✓ Efficiency improvements over the Budgeting, Purchasing, and Payables processes
- ✓ Visibility over budgets and expenditures
- ✓ Better forecasting of anticipated spending
- ✓ Integration with your General Ledger budgets

Get More Information



Blytheco  
1-800-425-9843  
solutions@blytheco.com  
www.blytheco.com/erequester

## Improve Resource Visibility with Budget Views and Alerts

<input type="checkbox"/> Select All	Item ID	Description	Qty / UOM	Cost	Tax	Sub Total	Total	Ship Date	
<input type="checkbox"/>	3157869	<u>1. Lenovo ThinkPad</u>	1,000 / each	SCR 2,995.0000	SCR 0.00	SCR 2,995.00	SCR 2,995.00	1/20/2017	
		<b>Additional Info</b>	<b>Vendor Info</b>		<b>Tax Info/GL Account/Project/Location</b>				
			Vendor: CDW		GL #: <u>000-00-0000</u> <a href="#">Edit</a>				
			Payment Terms: 60 days same as CASH		Expense Account for Support Request/ Seattle				
					Project #: <a href="#">Edit</a>				

Line item turns **RED** and warns users if over budget based on the Account Code

### Routing Rules

[Expand All](#) [Collapse All](#)

Request Submitted  
 Req: OverBudget = True  
 Route to User: Brent (Approver)

### Over-Budget Calculation Timeframe

- Calculate Over-Budget Alert by Period
- Calculate Over-Budget Alert by Quarter
- Calculate Over-Budget Alert by Year to Date

### Approval Routing

#### Routing Errors

Sorry, you're overbudget. Please adjust the amounts and try again.

- Easily setup workflow and approval routing for over budget requests
- Over budget alert can be based on Period, Quarter, Fiscal Year or Year to Date
- A hard stop with a configurable message can be enforced if requests are over budget

### Budget To Actual Report For GL Account 000-00-0000

Compare Actual and Committed amounts with the amount Budgeted per period for this GL Account.

Budget: 2017 Budget

Display:  Net Change  Year to Date

Period Name	Period Start	Period End	Actual	Committed	Pending	Total	Budget	Variance
Beginning Balance			SCR 0.00	SCR 0.00	SCR 0.00	SCR 0.00	SCR 0.00	SCR 0.00
Period 1	1/1/2017	1/31/2017	SCR 0.00	SCR 0.00	SCR 16,060.00	SCR 16,060.00	SCR 1,000.00	SCR 15,060.00
Period 2	2/1/2017	2/28/2017	SCR 0.00	SCR 0.00	SCR 0.00	SCR 0.00	SCR 1,000.00	SCR -1,000.00
Period 3	3/1/2017	3/31/2017	SCR 0.00	SCR 0.00	SCR 0.00	SCR 0.00	SCR 1,000.00	SCR -1,000.00
Period 4	4/1/2017	4/30/2017	SCR 0.00	SCR 0.00	SCR 0.00	SCR 0.00	SCR 1,000.00	SCR -1,000.00
Period 5	5/1/2017	5/31/2017	SCR 0.00	SCR 0.00	SCR 0.00	SCR 0.00	SCR 1,000.00	SCR -1,000.00
Period 6	6/1/2017	6/30/2017	SCR 0.00	SCR 0.00	SCR 0.00	SCR 0.00	SCR 1,000.00	SCR -1,000.00
Period 7	7/1/2017	7/31/2017	SCR 0.00	SCR 0.00	SCR 0.00	SCR 0.00	SCR 1,000.00	SCR -1,000.00
Period 8	8/1/2017	8/31/2017	SCR 0.00	SCR 0.00	SCR 0.00	SCR 0.00	SCR 1,000.00	SCR -1,000.00
Period 9	9/1/2017	9/30/2017	SCR 0.00	SCR 0.00	SCR 0.00	SCR 0.00	SCR 1,000.00	SCR -1,000.00
Period 10	10/1/2017	10/31/2017	SCR 0.00	SCR 0.00	SCR 0.00	SCR 0.00	SCR 1,000.00	SCR -1,000.00
Period 11	11/1/2017	9/30/2017	SCR 0.00	SCR 0.00	SCR 0.00	SCR 0.00	SCR 1,000.00	SCR -1,000.00
Period 12	10/1/2017	11/15/2017	SCR 0.00	SCR 0.00	SCR 0.00	SCR 0.00	SCR 1,000.00	SCR -1,000.00
Period 13	11/16/2017	12/15/2017	SCR 0.00	SCR 0.00	SCR 0.00	SCR 0.00	SCR 1,000.00	SCR -1,000.00
Period 14	12/16/2017	12/31/2017	SCR 0.00	SCR 0.00	SCR 0.00	SCR 0.00	SCR 1,000.00	SCR -1,000.00
TOTAL:			SCR 0.00	SCR 0.00	SCR 16,060.00	SCR 16,060.00	SCR 14,000.00	SCR 2,060.00

### KEY FEATURES:

- Line item and GL hyperlink turns RED and warns users if over-budget based on the Account code selected.
- Administrators can see Budgets for specified Account Codes per period for a Fiscal Year.
- A hard stop with a message can display if requests are over-budget.
- Over budget alerts can be based on Period, Quarter, Fiscal Year, or Year-to-Date budget comparisons.
- Budget Report is viewable showing Budgeted amounts to Actuals displaying Net change or Period Balance.
- Assign designated users the right to view budget information and compare budgets to actual for accounts.
- Flag over-budget items so approvers can determine if requisitions are within existing budgets.

Budget Report is viewable showing Budgeted amount per Period and Fiscal Year, compared to Actuals, Commitments and Pending Commitments.

*Request a Demo Today!* 

