

# SunSystems 6 Budgeting & Forecasting - Training Agenda

## 1 – About this guide

## 2 – Overview:

- Definition of Budget Ledger / What Levels Budget Definition For
- Asset Budgets / Multi-Currency Budgets

## 3 – Optional Ledger Tables:

- Overview / Optional Ledger Tables / Budget Labels / Changing Budget Ledger
- **Exercise 1:** Creating Optional Ledger Tables
- **Exercise 2:** Creating a Budget Label
- **Exercise 3:** Creating a Forecast Ledger and assigning a Budget Label

## 4 – Entering Budgets and Forecasts into SunSystems:

- Overview / Methods
- **Exercise 4:** Using Q&A to Import Budget
- **Exercise 5:** Create a Transfer Profile to Copy Ledgers
- **Exercise 6:** Using Transfer Desk to Copy Actuals for Forecast Ledger
- **Exercise 7:** Using Transfer Desk to Copy Budget across to Forecast Ledger

## 5 – Expenditure Checking (*for information only*)

## 6 – Budget & Forecast Reporting

- Reporting on Budget Ledgers from Sun
- **Exercise 8:** Producing a Q&A Report on Actuals Vs Budget

## 7 – Permissions

## 8 – Hints & Tips