

Budget Freeze for Business Central Jobs Setup Guide



Budget Freeze for Business Central Jobs

CORPORATE RENAISSANCE GROUP

 Dynamics 365 Business Central

Free trial

Free trial

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Freeze your starting budget in BC jobs for a permanent snapshot and easy comparison with actuals.

Are you losing out on valuable insights by not being able to reference initial budgets in Microsoft Dynamics 365 Business Central? CRGroup is pleased to bring you Budget Freeze for Business Central Jobs. Developed using CRGroup's extensive experience in the Dynamics ERP space, this easy-to-use add-on will allow you to save your initial job budgets for better reporting and comparison.

- Once all job task and job planning lines have been generated click freeze budget.
- The Budget Total Cost field will populate into the Original Budget Total Cost field.
- If changes are made to a budget line in the job planning lines, the Budget Total Cost field will update, providing a comparative to the Original Budget Total Cost.
- The budget freeze process can be activated multiple times if required. The user will be given a warning message to ensure they wish to update the Original Budget Total Cost field.

Get started with a free 30 day trial.

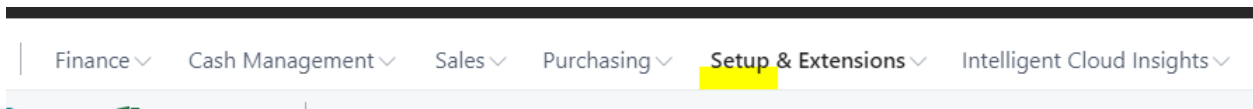
This application is available only in English. The app supports the Essentials and Premium Editions of Microsoft Dynamics 365 Business Central. All countries are supported.

Get Better Insights Into Budgets vs. Actuals

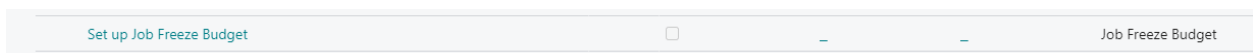
Budget Freeze for Business Central Jobs is the only extension available for Dynamics 365 Business Central that allows for freezing your initial job budgets. Save your budgets for better insights and comparisons. [Contact us](#) to learn more.

1.1 Set up License Key.

Log into **Business Central**, select **Setup & Extension** in the top menu.



1.2 Select **Assisted Setup** and in **Assisted Setup** page click **Set up Job Freeze Budget**.



1.3 The **Job Freeze Wizard Page** will show, click next, and go to **License Page**.

Job Freeze

License | [+ Get Trials License Key](#) | [+ Production License Key](#) | [Refresh License Key](#) | [Fewer options](#)

LicenseKey

Expire Date

License Type

The user can click the **'Get Trials License Key' button** and get a free license key. The user can click **'Production License key'** and get a production license key. The user can click **'Refresh License Key'** if the user wants to refresh the **Production License key**.

2. Assign permissions to users or user groups.

This extension has two permission sets, these are **'Update Job Freeze Budget'** and **'Setup Job Freeze Budget License'**. These permission sets need to be assigned to users or user groups that need these permissions.

3. How the function works.

Having visibility into job budgets and comparison to reforecast budgets can be critical to business. With the Job Freeze Budget app, Project Managers can create budgets and "freeze" them for visibility and comparison to reforecast budgets at a later point in time.

- 3.1.** Once all job task and job planning lines budget amounts have been generated for a particular job, navigate to the **Job Card menu**, select **Process** then select **Job Freeze Budget**. The original budget will now be saved for the job. Both the **Budget (Total Cost)** and **Original Budget (Total Cost)** columns will be updated with the original budget amount.
- 3.2** Now suppose that revised information about the job needs to be incorporated into a reforecast budget, but you want to maintain the original budget for comparison purposes. This is where the **Job Freeze Budget App** comes in. Any subsequent budget changes made to the job planning or job task lines will update the **Budget (Total Cost)** column, leaving the **Original Budget (Total Cost)** intact, providing a comparative to the Original Budget Total Cost. The job freeze budget process can be activated more than once if required. However, if the process is run more than once, the original budget will be overwritten with the most recent reforecast changes. The user will be given a warning message to ensure they wish to update the Original Budget Total Cost field. See examples below:

Total Budget Cost

Original budget updates the Budget (Total Cost) column.

Tasks		Manage	Line	Fewer options			
Job Task No.	Description	Job Task Type	Start Date	End Date	Budget (Total Cost)	Original Budget (Total Cost)	
→ 100	Phase 1-Plan...	Posting	2020-12-10	2020-12-10	2,000.00	-	
200	Phase 2-Desi...	Posting	2020-12-10	2020-12-10	5,000.00	-	
300	Phase 3-Build	Posting	2020-12-10	2020-12-10	15,000.00	-	
900	Contract Price	Posting	2020-12-10	2020-12-10	-	-	

Navigate to Process > Job Freeze Budget

Job Card

J00210 · Sample App Functionality

[Process](#)
[Report](#)
[Prices & Discounts](#)
[WIP](#)
[Navigate](#)
[Job](#)
[Print/Send](#)

Copy Job Tasks from...
 Copy Job Tasks to...
 Job Freeze Budget

Job Budget Freeze

Now the Original Budget (Total Cost) and Budget (Total Cost) columns have been populated with current budget information. These columns will be the same if only the original budget information is entered in Business Central. Without the app, the Original Budget (Total Cost) would be lost. Any budget changes would overwrite the original budget column.

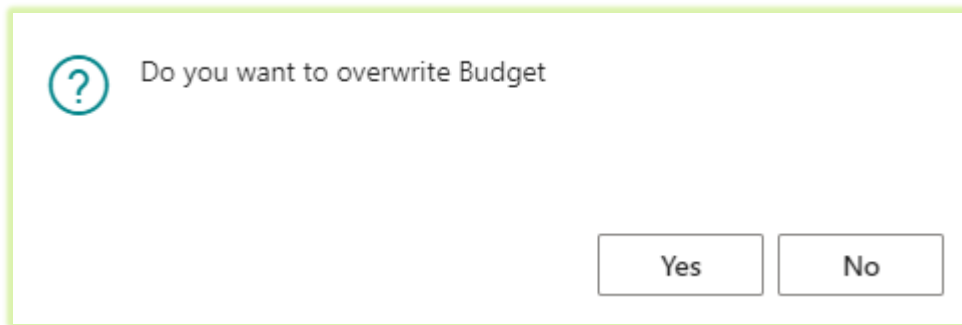
Tasks		Manage	Line	Fewer options			
Job Task No.	Description	Job Task Type	Start Date	End Date	Budget (Total Cost)	Original Budget (Total Cost)	
→ 100	Phase 1-Plan...	Posting	2020-12-10	2020-12-10	2,000.00	2,000.00	
200	Phase 2-Desi...	Posting	2020-12-10	2020-12-10	5,000.00	5,000.00	
300	Phase 3-Build	Posting	2020-12-10	2020-12-10	15,000.00	15,000.00	
900	Contract Price	Posting	2020-12-10	2020-12-10	-	-	

Changes to Budget Total Cost

Note that the Budget (Total Cost) column has changed for any edits made to the job task budget lines. The Original Budget (Total Cost) column maintains the original budget information for comparison purposes.

Tasks		Manage	Line	Fewer options		
Job Task No.	Description	Job Task Type	Start Date	End Date	Budget (Total Cost)	Original Budget (Total Cost)
→ 100	Phase 1-Plan...	Posting	2020-12-10	2020-12-10	6,000.00	2,000.00
200	Phase 2-Desi...	Posting	2020-12-10	2020-12-10	5,000.00	5,000.00
300	Phase 3-Build	Posting	2020-12-10	2020-12-10	15,000.00	15,000.00
900	Contract Price	Posting	2020-12-10	2020-12-10	-	-

App warning message before overwriting Original Budget (Total Cost)



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business management platform.

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more about the power of Dynamics 365
Business Central

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