

Budgeting



- Now available
- Control budgeting and actual creation process for sales
- Review what happened compared to budget
- Compare previous budgets to this year
- Define an unlimited number of Budget Methods (keys) for any period of time
- Various analysis options available

Introducing Answer Budgeting

Answer Sales Budgeting and Analysis provides the facilities to control the budgeting and actual creation process for Sales.

The review of what has actually happened when compared to budget enables a business to closely scrutinise its performance. Answer Sales Budgeting and Analysis helps answer the questions:

Who are my best/poorest performing Customers?

What are my best/poorest performing Products?

Who are my best/poorest performing Sales Representatives?

And much, much more.

All Actual Analysis can be made based on:

Revenue Value

Quantity

Margin Value

Margin Percentage

This can then be compared with previously defined budgets for this Year vs. Past Years.

As an integral component of the Answer ERP Solution, Sales Budgeting and Analysis is fully integrated to the Sales Order Processing module.

"Compare budgets to what actually happened and scrutinise business performance."

Budget Management

Define an unlimited number of Budget Methods (keys) for any period of time using any combination of the following details:

Company Hierarchy – Company, Division, Branch, Department

Customer – Bill To Customer, Location, Customer Account Type, Customer Type

Part – Inventory Centre, Part Number

Product – Product Family Line/Type/Group, Product Group Type

Marketing – Marketing Company, Marketing

Division/Region, Marketing Representative, Marketing Agency

Geographical – TV Advertising Area, Country Code, City Code, Territory Code

Customer Analysis – Customer Analysis Codes 1-10

Build Budgets based on previously defined Budget Methods for Revenue Value, Quantity (as appropriate), Margin Value and/or Margin Percentage

Allocate the Budget amounts by utilising a Sales Budget Profile facility

Budget by Year, Month, Period

as is required by Budget Method

Define Budget Year Calendar by Month, Period, Week, Calendar Quarter, Period Quarter etc

At Invoicing time from Sales Order Processing all actual details will be automatically and dynamically updated to all defined Budget Methods as previously defined

Budget Analysis (Enquiries)

- Enquire by Sales Representative for any Calendar Year, by Period Week, Period Summary, Period Quarter, Month and/or Monthly Quarter, comparing Budget to Actual for Revenue Value, Margin Value and Margin Percentage and this Year to Last Year
- Enquire by Customer for any Calendar Year, by Period Week, Period Summary, Period Quarter, Month and/or Monthly Quarter, comparing Budget to Actual for Revenue Value, Margin Value and Margin Percentage and this Year to Last Year
- Enquire by Part/Product for any Calendar Year, by Period Week, Period Summary, Period Quarter, Month and/or Monthly Quarter, comparing Budget to Actual for Quantity, Revenue Value, Margin Value and Margin Percentage and this Year to Last Year

Budget Analysis (Reporting)

By use of our Partner Product IcanCiT, all data structures can be reported against

Standard Answer ReportBook (IcanCiT views of the Answer database) are provided covering the following application areas:

- Sales Analysis
- Sales Orders
- Finance – Accounts Receivable
- Finance – Accounts Payable
- Finance – General Ledger
- Inventory
- Purchasing
- Manufacturing

Sales Analysis

- Customer Product Sales Activity By Month/Period/Quarter/Week
- Customer Product Sales vs. Budget By Month/Period/Week
- Customer Product Sales Detail By Month/Period/Quarter/Week
- Customer Product Ranking By Month/Period/Quarter/Week
- Customer Product Sales Summary By Month/Period/Quarter/Week
- Customer Product Sales Table By Month/Period/Quarter/Week
- Product Sales Activity By Month/Period/Quarter/Week
- Product Sales vs. Budget By Month/Period/Week
- Product Customer Sales Activity By Month/Period/Quarter/Week
- Product Customer Sales vs. Budget By Month/Period/Week
- Product Customer Sales Detail By Month/Period/Quarter/Week
- Product Customer Ranking By Month/Period/Quarter/Week
- Product Customer Sales Summary By Month/Period/Quarter/Week
- Product Customer Sales Table By Month/Period/Quarter/Week
- Product Sales Detail By Month/Period/Quarter/Week
- Product Ranking By Month/Period/Quarter/Week

Sales Orders

- Cancelled Sales Order By Customer
- Lost Sales Orders By Customer
- Late Sales Order Shipments By Customer
- Open Sales Orders By Customer
- Overdue Sales Orders By Customer
- Sales Order Returns By Customer
- Sales Orders Shipped Not Invoiced By Customer
- Lost Sales Orders By Product
- Late Sales Order Shipments By Product
- Open Sales Orders By Product
- Overdue Sales Orders By Product
- Sales Order Returns By Product
- Sales Orders Shipped Not Invoiced By Product

Finance—Accounts Receivable

- Closed Items Accounts Receivable
- Closed Items Activity Accounts Receivable
- Open Items Accounts Receivable
- Open Items Activity Accounts Receivable
- Period End Balances Accounts Receivable

Finance—Accounts Payable

- Closed Items Accounts Payable
- Open Items Accounts Payable
- Current Vendor Balances Accounts Payable

Finance—General Ledger

- General Ledger Actuals
- General Ledger Account Balances
- General Ledger Budgets
- General Ledger Forecast
- General Ledger Archive Journals
- General Ledger Current/Future Journals
- General Ledger Historical Journals

Inventory

- Total Stock Holding
- Stock By Location
- Stock By Status
- End of Period Stock Usage
- Stock Valuation

Purchasing

- Open Purchase Orders Non Stock
- Overdue Purchase Orders Non Stock
- Open Purchase Orders By Product
- Overdue Purchase Orders By Product
- Purchase Order Quantity and Value By Product
- Open Purchase Orders By Supplier
- Overdue Purchase Orders By Supplier
- Purchase Order Quantity and Value By Supplier
- Supplier Performance

Manufacturing

- Account Closed Works Orders
 - Firm Planned Works Orders
 - Open Works Orders
 - Production Closed Works Orders
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Answer Solutions

At Answer Solutions we are committed to creating and supplying the highest quality application and implementation solutions. We deliver practical software for companies looking beyond ready-to-install packages and

specialise in solutions for the process industry as well as the traditional manufacturer.

Answer Enterprise can change and grow with your business. We have the solution for each and every company and our depth of experience means

we know what works. We can show you the tools and programs to suit your business type and help drive your company to really achieve in today's competitive market.

Answer Enterprise

Answer has been designed with the process industry requirements built in, we have an in-depth knowledge of this industry area which means that we can adapt and respond to industry changes as they happen.

We supply a wide range of industry types and we realise that no company will fit exactly into a pre-defined category, each has it's own unique requirements.

Answer Enterprise can be broken down into several main sections, each containing a group of modules.

Distribution - designed for fast moving environments and totally integrated into Answer, use this to reduce costs and build customer loyalty.

E-Business - A comprehensive integrated solution to providing customers, vendors and employees self service access to your core Answer applications.

Manufacturing - Address functions across the entire enterprise and supply chain, increase your ability to compete successfully.

Contact Centre - Instant access to information on contacts, providing a consistent view of the customer/vendor across the business.

Maintenance - All aspects of company maintenance often overlooked by other ERP systems, improve productivity and increase profit.

Warehouse - Based on the concept of Random Storage, this is a fully integrated module made as flexible as possible to manage all situations.

Financials - Comprehensive accounting functions, from simple to highly complex for you to take control with a minimum of effort.

Rental & Hire - Automate all hire activities, from initial customer enquiry to final invoice, equipment purchase planning to servicing.

"We realise that no company will fit exactly into a pre-defined category, each has it's own unique requirements."

