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# BEAM

(Budgeting & Estimates For Annual Metrics)



Version 1.0

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## Objective:

The objective of **BEAM (Budgeting & Estimates for Annual Metrics)** is to provide a streamlined and user-friendly system for initiating, managing, and approving projected expense and revenue budget requests across various business units. Finance will request for actual requests, This will help to find variance between projected and actual budget. The platform facilitates clear workflows for approvers and initiators, supports detailed reporting, enables bulk uploads, and ensures traceability of all budget-related actions. BEAM aims to improve efficiency, transparency, and accountability in the organization's budgeting process.

**LOGIN :** For login you need to Enter Username and Password

The login screen features a white form box on a blue background with financial charts. The form includes the BEAM logo, a 'Log In' title, and two input fields: 'Username \*' with a placeholder 'Enter username' and 'Password \*' with a placeholder 'Enter password' and an eye icon. Below the fields is a purple 'Log In' button. At the bottom of the form are links for 'Forgot Password' and 'Reset'.

**OTP VERIFICATION:** Enter OTP Provided to your email address

The OTP verification screen is similar to the login screen but includes an additional 'OTP \*' field with a placeholder for the OTP. The 'Log In' button is replaced by a purple 'Verify' button. A green checkmark icon and a message 'OTP sent successfully to your registered email address.' are displayed in the top right corner. The background and form layout are consistent with the previous screen.



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## Assigned To Me:

**View Request:** You can view requests that are assigned to you

BEAM-Budgeting & Estimates For Annual Metrics

Welcome , Akash ujwal

Assigned to me

My Requests

Report

My Queries

Assigned To Me

Show 1

Export

Id	Company	Business	Budget Type	Total Revenue	Total Expense	P&L	For Period	Raised By	Raised On	Status	View
129	ATPL	BPO	Projected	INR N/A	INR 900	INR -900.00	Jul-2025 to Jul-2025	Akash	30-May-2025 12:16 pm	Pending	View

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First < 1 > Last

**View:** Clicking on view button to view whole request, Yu will see multiple options like Approve, reject, query, Modify etc.

BEAM-Budgeting & Estimates For Annual Metrics

Welcome , Akash ujwal

Request Detail

Company : ATPL

Business Group : BPO

Requested By : Akash ujwal

Budget Id : 129

Total Revenue : INR N/A

Total Expense : INR 900

Status : Pending at Akash ujwal

Modify

Export

Head	Client	Business Type	Jul-2025	Total Sum INR
Repair & Maintenance Char	1T9 Technology Private Li	Expense(INR)	900	900

Approve

Reject

Query

Activity Logs

Notes

Activity	Created At
Akash ujwal has raised a new request for business BPO.	30-May-2025 12:16 pm

No Record Found..!!



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**Modify Request:** For modifying request you can Download sample excel file and upload to modify the request.

The screenshot shows the 'Modify Summary' dialog box in the BEAM-Budgeting & Estimates For Annual Metrics application. The dialog box has a 'Choose File' button and a 'No file chosen' text. Below the dialog box, the 'Request Detail' section shows the following information:

Head	Client	Business Type	Jul-2025	Total Sum INR
Repair & Maintenance Char	1T9 Technology Private Li	Expense(INR)	900	900

Below the table, there are three buttons: 'Approve', 'Reject', and 'Query'. The 'Activity Logs' section shows the following activity:

Activity	Created At
Akash ujwal has raised a new request for business BPO.	30-May-2025 12:16 pm

The 'Notes' section shows 'No Record Found..!!'. The status is 'Pending at Akash ujwal'.

**Raise Query:** For raising query, Click on query button then select the user and add note.

The screenshot shows the 'Raise query' dialog box in the BEAM-Budgeting & Estimates For Annual Metrics application. The dialog box has a 'Select User \*' dropdown menu with 'Akash ujwal' selected. Below the dropdown menu, there is a 'Query Note \*' text area with the placeholder text 'Enter query'. Below the dialog box, the 'Request Detail' section shows the following information:

Head	Client	Business Type	Jul-2025	Total Sum INR
Repair & Maintenance Char	1T9 Technology Private Li	Expense(INR)	900	900

Below the table, there are three buttons: 'Approve', 'Reject', and 'Query'. The 'Activity Logs' section shows the following activity:

Activity	Created At
Akash ujwal has raised a new request for business BPO.	30-May-2025 12:16 pm

The 'Notes' section shows 'No Record Found..!!'. The status is 'Pending at Akash ujwal'.

**Approve Request:** Click on Approve button to approve the request. Then it will pass to next level approver, If you are final approve then request will be finally approved.

**Reject Request:** Click on Reject button to reject the request. Then it will reject immediately and will not move forward.



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## MY REQUEST:

**View Request:** You can view submit requests in **My Request** Section.

**Status:** View status of your request it is pending or approved.

**View:** Clicking on view button to view whole request, to see it is pending on which approver.

BEAM-Budgeting & Estimates For Annual Metrics

Details Saved Successfully

Assigned to me My Requests Report My Queries

My Requests

Show 3

Budget Id	Company	Business	Budget Type	Total Revenue	Total Expense	P&L	For Period	Raised By	Raised On	Status	View
108	ATPL	BPO	Projected	INR 1,86,00,000	INR 1,86,00,000	INR 0.00	Apr-2025 to Mar-2026	Akash	27-Mar-2025 11:37 am		
107	ATPL	BPO	Actual	INR 1,86,00,000	INR 1,86,00,000	INR 0.00	Apr-2025 to Mar-2026	Akash	07-Mar-2025 11:59 am		
106	ATPL	BPO	Projected	INR 5,58,00,000	INR 5,58,00,000	INR 0.00	Apr-2025 to Mar-2026	Test_akash	27-Feb-2025 10:25 am		

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First < 1 > Last

## Report:

**View:** You can view the requests here, only in projects you are added.

**Export:** You can export the request, it will be download automatically.



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BEAM-Budgeting & Estimates For Annual Metrics

Welcome , Akash ujjiwal

Assigned to me

My Requests

Report

My Queries

Report

Show 10

Export

Id	Company	Business	Budget Type	Total Revenue	Total Expense	P&L	For Period	Raised By	Raised On	Pending At	Status	View
129	ATPL	BPO	Projected	INR N/A	INR 900	INR -900.00	Jul-2025 to Jul-2025	Akash	30-May-2025 12:16 pm	Akash		

Page:1 of 1

First < 1 > Last

## My Queries:

**View:** You can view the queries here which have been assigned to you

BEAM-Budgeting & Estimates For Annual Metrics

Welcome , Akash ujjiwal

Assigned to me

My Requests

Report

My Queries

Query Inbox

My Raised

Query Inbox

Export

QueryId	Query	Company Name	Business	Raised By	Raised On	View
2	provide attachment	ATPL	BPO	Akash ujjiwal	30-May-2025 12:35 pm	

**Reply:** You can Reply on the queries, which have been assigned to you



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BEAM-Budgeting & Estimates For Annual Metrics

Welcome , Akash ujwal

Request Detail

Company : ATPLBusiness Group : BPORequested By : Akash ujwal

Budget Id : 129Total Revenue : INR N/ATotal Expense : INR 900

Status : Pending at Akash ujwal

ModifyExport

Head	Client	Business Type	Jul-2025	Total Sum INR
Repair & Maintenance Char	1T9 Technology Private Li	Expense(INR)	900	900

Reply

Activity Logs

Activity	Created At
Akash ujwal has raised new query for business BPO.	30-May-2025 12:35 pm
Akash ujwal has raised a new request for business BPO.	30-May-2025 12:16 pm

No Record Found..!!

## Initiating Projected Request:

BEAM-Budgeting & Estimates For Annual Metrics

Welcome , Akash ujwal

Create Projected Request

My Requests

Report

My Queries

My Requests

Show 3

Export

Budget Id	Company	Business	Budget Type	Total Revenue	Total Expense	P&L	For Period	Raised By	Raised On	Status	View
108	ATPL	BPO	Projected	INR 1,86,00,000	INR 1,86,00,000	INR 0.00	Apr-2025 to Mar-2026	Akash	27-Mar-2025 11:37 am		
107	ATPL	BPO	Actual	INR 1,86,00,000	INR 1,86,00,000	INR 0.00	Apr-2025 to Mar-2026	Akash	07-Mar-2025 11:59 am		
106	ATPL	BPO	Projected	INR 5,58,00,000	INR 5,58,00,000	INR 0.00	Apr-2025 to Mar-2026	Test_akash	27-Feb-2025 10:25 am		

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First < 1 > Last

**Requested By:** This Field will display your name as the initiator

**Approver:** First Level Approver's name will be visible, after selecting company and business



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BEAM-Budgeting & Estimates For Annual Metrics

Welcome , Akash ujjwal

Create Projected Budget

Requested By : Akash ujjwal Approver: N/A

Select Company \* Select Business \* Select Currency

Bulk Upload

+ -

Select Head Select Ledger Name Select Cost Center

Select Year Select Month Quantity \* Rate \* Total \* Enter Total

Clear

Submit Reset

Activity Logs No Record Found..!!

Notes No Record Found..!!

## STEP 1:

**Select Company (Mandatory):** Choose the appropriate **company** from the dropdown

BEAM-Budgeting & Estimates For Annual Metrics

Welcome , Akash ujjwal

Create Projected Budget

Requested By : Akash ujjwal Approver: N/A

Select Company \* Select Business \* Select Currency

Bulk Upload

+ -

Select Head Select Ledger Name Select Cost Center

Select Year Select Month Quantity \* Rate \* Total \* Enter Total

Clear

Submit Reset

Activity Logs No Record Found..!!

Notes No Record Found..!!

## STEP 2:





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**Select Business (Mandatory):** Choose the relevant **Business Unit** from the dropdown

BEAM-Budgeting & Estimates For Annual Metrics

Welcome , Akash ujwal

Create Projected Budget

Requested By : Akash ujwal

Approver: N/A

Select Company \* ATPL

Select Business \* BPO

Select Currency

Bulk Upload

Clear

Select Head

Select Ledger Name

Select Cost Center

Select Year

Select Month

Quantity \*

Rate \*

Total \* Enter Total

Submit

Reset

Activity Logs

No Record Found..!!

Notes

No Record Found..!!

### STEP 3:

**Select Currency:** Choose the **Currency** of projection from the dropdown

BEAM-Budgeting & Estimates For Annual Metrics

Welcome , Akash ujwal

Create Projected Budget

Requested By : Akash ujwal

Approver: N/A

Select Company \* ATPL

Select Business \*

Select Currency

Bulk Upload

Clear

Select Head

Select Ledger Name

Select Cost Center

Select Year

Select Month

Quantity \*

Rate \*

Total \* Enter Total

Submit

Reset

Activity Logs

No Record Found..!!

Notes

No Record Found..!!



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#### STEP 4:

**Select Business Type:** Click the dropdown to choose the **Business Type**, is it Expense or Revenue.

The screenshot shows the BEAM-Budgeting & Estimates For Annual Metrics interface. The top bar includes the BEAM logo, a hamburger menu, the title 'BEAM-Budgeting & Estimates For Annual Metrics', and a welcome message 'Welcome , Akash ujwal'. Below the top bar, there is a 'Create Projections' button. The main form area contains fields for 'Requested By : Akash ujwal', 'Approver: N/A', 'Select Company \*', 'Select Business \*', and 'Select Currency'. A 'Bulk Upload' button is also present. Below these fields, there is a 'Select Business Type \*' dropdown menu which is open, showing 'Expense' and 'Revenue' options. Other fields include 'Select Head', 'Select Client', 'Month', 'Quantity \*', 'Rate \*', and 'Total \*'. There are 'Submit' and 'Reset' buttons at the bottom of the form. At the very bottom, there are 'Activity Logs' and 'Notes' sections, both displaying 'No Record Found..!!'.

#### STEP 5:

**Select Head:** Click the dropdown to choose the **budget category or head**. This will categorize your budget request (e.g., Employee Cost, Services etc.)

The screenshot shows the BEAM-Budgeting & Estimates For Annual Metrics interface. The top bar includes the BEAM logo, a hamburger menu, the title 'BEAM-Budgeting & Estimates For Annual Metrics', and a welcome message 'Welcome , Akash ujwal'. Below the top bar, there is a 'Create Projected Budget' button. The main form area contains fields for 'Requested By : Akash ujwal', 'Approver: Akash ujwal', 'Select Company \*' (with 'ATPL' selected), 'Select Business \*' (with 'BPO' selected), and 'Select Currency' (with 'INR' selected). A 'Bulk Upload' button is also present. Below these fields, there is a 'Select Head' dropdown menu which is open, showing a list of budget categories: 'Administration & Selling Expenses', 'Services Received, Data Center Charges, Telephone & Mobile Charges, PRI Charges for Call Centre', 'Interest & Finance Charges', and 'Employee Cost'. Other fields include 'Select Ledger Name', 'Select Cost Center', 'Month', 'Quantity \*', 'Rate INR \*', and 'Total \*'. There are 'Submit' and 'Reset' buttons at the bottom of the form. At the very bottom, there are 'Activity Logs' and 'Notes' sections, both displaying 'No Record Found..!!'.



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## STEP 6:

**Select Client:** Select the **Client** associated with the projection.

## STEP 7:

### Time Period Selection

1. **Select Year:** Choose the specific year for which the budget is being projected



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# 1. **Select Month:** Select the specific month if this is a monthly budget

## STEP 8:

**Add Quantity:** Add the **quantity** for projection request.



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## STEP 8:

**Add Rate:** Add the **Rate** according to you selected currency for projection request.

The screenshot shows the 'Create Projected Budget' form in the BEAM system. The form is titled 'Create Projected Budget' and includes fields for 'Requested By' (Akash ujwal) and 'Approver' (Akash ujwal). The form is divided into two main sections: 'Select Company \*' (ATPL), 'Select Business \*' (BPO), and 'Select Currency' (INR). Below these are fields for 'Select Head' (Services Received, Data Center Charges, Teleph...), 'Select Ledger Name' (Data Center Charges), and 'Select Cost Center' (Ambala). There are also fields for 'Select Year' (2025), 'Select Month' (May), 'Quantity \*' (20), 'Rate INR \*' (200), and 'Total \*' (4000). A 'Bulk Upload' button is present. At the bottom, there are 'Submit' and 'Reset' buttons. Below the form, there are two tabs: 'Activity Logs' and 'Notes', both showing 'No Record Found..!!'.

## Total Amount:

Total amount will be calculated automatically for projection by provided quantity and rate

This screenshot is identical to the previous one, showing the 'Create Projected Budget' form. The 'Rate INR \*' field is highlighted with a blue border, indicating it is the current focus for data entry. The 'Total \*' field shows the calculated value of 4000 based on the provided quantity and rate.

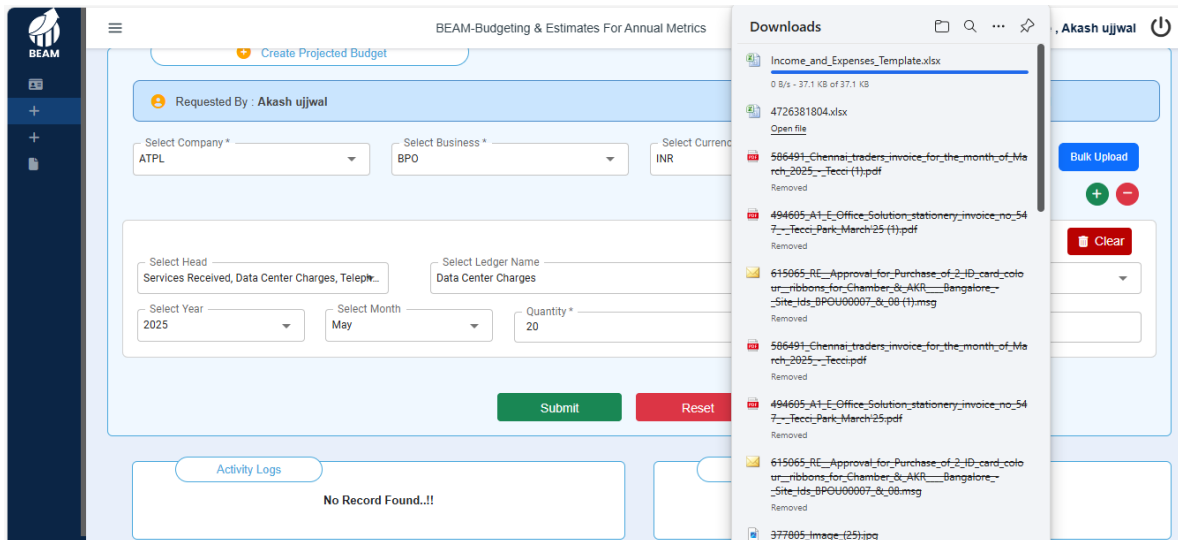
## Bulk Upload:



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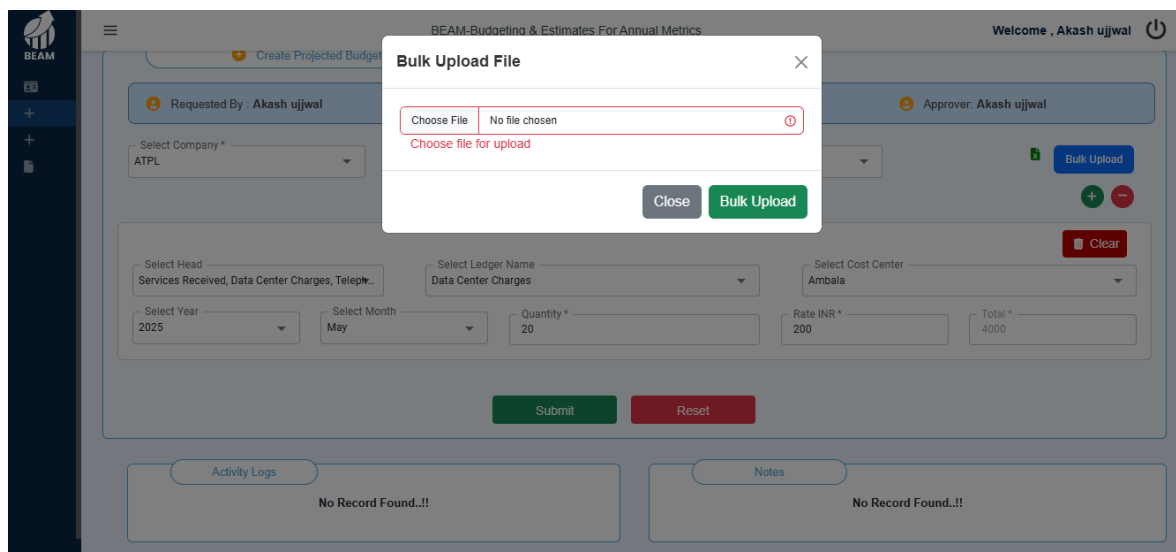
## STEP 1:

For Creating request in Bulk, Download template of bulk request. It will guide you how the request will be submit, all field you need to Add .



## STEP 2:

**Upload Bulk Request:** After doing changes in file. Upload the file by clicking on **Bulk Upload** Button





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### STEP 3:

**View Bulk Projection Request:** After Uploading the file, you can **view** your request.

The screenshot shows the BEAM-Budgeting & Estimates For Annual Metrics interface. The top bar includes the BEAM logo, a hamburger menu, the title "BEAM-Budgeting & Estimates For Annual Metrics", and a welcome message "Welcome , Akash ujwal". Below the top bar, there is a section for "Requested By : Akash ujwal" and "Approver: Akash ujwal". Below this, there are three dropdown menus: "Select Company \*" (ATPL), "Select Business \*" (BPO), and "Select Currency \*" (INR). To the right of these dropdowns are buttons for "Bulk Upload" and a circular arrow icon. Below the dropdowns is a table with the following data:

Head	Cost Center/Client	Business Type	Apr-2025	May-2025	Jun-2025	Jul-2025	Aug-2025	Sep-2025	Oct-2025	Nov-2025
Administration_and_Sellin	Amar Synergy	Expense(INR)	4,50,000	4,50,000	4,50,000	4,50,000	4,50,000	4,50,000	4,50,000	4,50,000
Cost_of_Service_Consumed	Corporate Office	Expense(INR)	1,00,000	1,00,000	1,00,000	1,00,000	1,00,000	1,00,000	1,00,000	1,00,000
Employee_Cost	E Space -A2	Expense(INR)	10,00,000	10,00,000	10,00,000	10,00,000	10,00,000	10,00,000	10,00,000	10,00,000
BPO_Revenue	Amazon Seller Services Pv	Revenue(INR)	4,50,000	4,50,000	4,50,000	4,50,000	4,50,000	4,50,000	4,50,000	4,50,000
BPO_Revenue	Axis Bank Limited - MUM	Revenue(INR)	10,00,000	10,00,000	10,00,000	10,00,000	10,00,000	10,00,000	10,00,000	10,00,000
BPO_Revenue	Axis Bank Limited.	Revenue(INR)	1,00,000	1,00,000	1,00,000	1,00,000	1,00,000	1,00,000	1,00,000	1,00,000

Below the table are "Submit" and "Reset" buttons. There is also an "Export" button in the top right corner of the table area.

### STEP 4:

**Submit Request:** Click on **submit** button to submit the request.

The screenshot shows the BEAM-Budgeting & Estimates For Annual Metrics interface with a "Submit Confirmation" dialog box open. The dialog box contains the text "Are you sure you want to submit this request?" and has "Close" and "Submit" buttons. The background interface is dimmed, showing the same table and buttons as in the previous screenshot.



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## Initiating Actual Request:

For Initiating **Actual request**, you should follow same procedure as of **creating projection request**

The screenshot shows the 'Add Actuals' section of the BEAM-Budgeting & Estimates For Annual Metrics interface. The interface includes a sidebar with the BEAM logo and navigation icons. The main content area has a header with 'Add Actuals' and 'Requested By : Akash ujjwal'. Below this, there are several dropdown menus for 'Select Company \*', 'Select Business \*', 'Select Currency', 'Select Business Type \*', 'Select Head', and 'Select Client'. There are also input fields for 'Select Year', 'Select Month', 'Quantity \*' (with a value of 1), 'Rate \*', and 'Total \*' (with a placeholder 'Enter Total'). A 'Bulk Upload' button is visible on the right. At the bottom, there are 'Submit' and 'Reset' buttons. Below the main form, there are two sections: 'Activity Logs' and 'Notes', both displaying 'No Record Found..!!'.

## Summary Reports:

### STEP 1:

Go to the **Summary Report** section

The screenshot shows the 'Summary Report' section of the BEAM-Budgeting & Estimates For Annual Metrics interface. The interface includes a sidebar with the BEAM logo and navigation icons. The main content area has a header with 'Summary Report'. Below this, there are several dropdown menus for 'Select Company \*', 'Select Business \*', and 'Select Budget Type'. There are also date pickers for 'Start Year & Month' and 'End Year & Month'. At the bottom, there are 'Reset' and 'Submit' buttons.





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## STEP 2:

**Select Company :** Select **company** from the dropdown

BEAM-Budgeting & Estimates For Annual Metrics

Welcome , Akash ujjwal

Summary Report

Select Company \*  
ATPL

Select Business \*

Select Budget Type

Start Year & Month

End Year & Month

Reset Submit

## STEP 3:

**Select Business Unit :** Select **Business Unit** from the dropdown

BEAM-Budgeting & Estimates For Annual Metrics

Welcome , Akash ujjwal

Summary Report

Select Company \*  
ATPL

Select Business \*  
BPO

Select Budget Type

Start Year & Month

End Year & Month

Reset Submit



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#### STEP 4:

**Select Budget Type :** Select **Budget Type** from dropdown is it **Actual** or **Projected**.

BEAM-Budgeting & Estimates For Annual Metrics

Welcome , Akash ujjwal

Summary Report

Select Company \*  
ATPL

Select Business \*  
BPO

Select Budget Type  
Projected  
Actual

Start Year & Month

End Year & Month

Reset Submit

#### STEP 5:

**Select Date Range :** Select **Date Range**

BEAM-Budgeting & Estimates For Annual Metrics

Welcome , Akash ujjwal

Summary Report

Select Company \*  
ATPL

Select Business \*  
BPO

Select Budget Type  
Projected

MM-YYYY

End Year & Month

Reset Submit

May 2025

Jan	Feb	Mar	Apr
2025	May	Jun	Jul
Sep	Oct	Nov	Dec

Jan	Feb	Mar	Apr
2026	May	Jun	Jul
Sep	Oct	Nov	Dec

#### STEP 6:



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Submit the request by clicking on submit Button, Report will be download automatically.

