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BEAM

(Budgeting & Estimates For Annual Metrics)

Version 1.0

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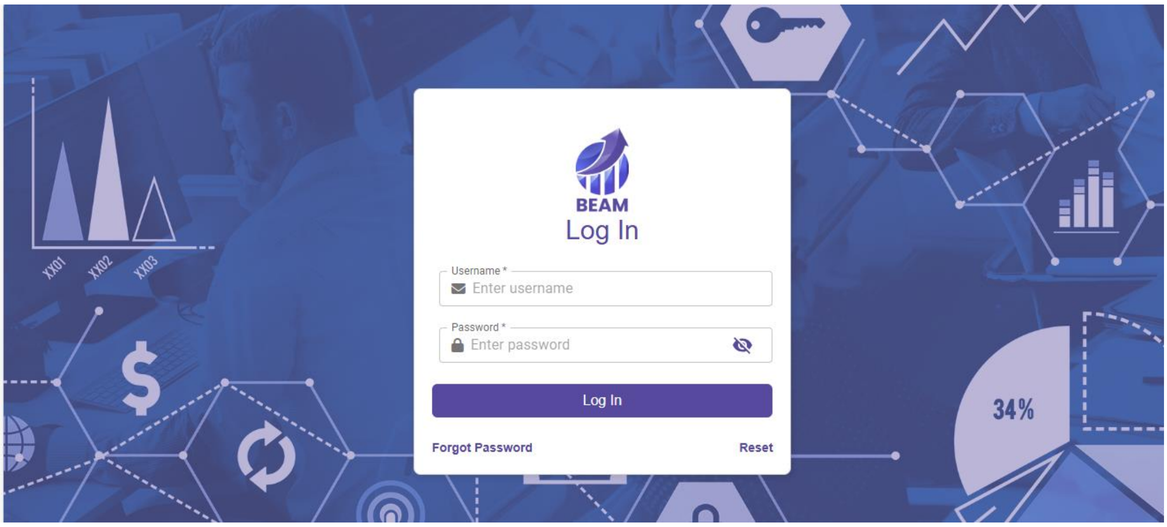
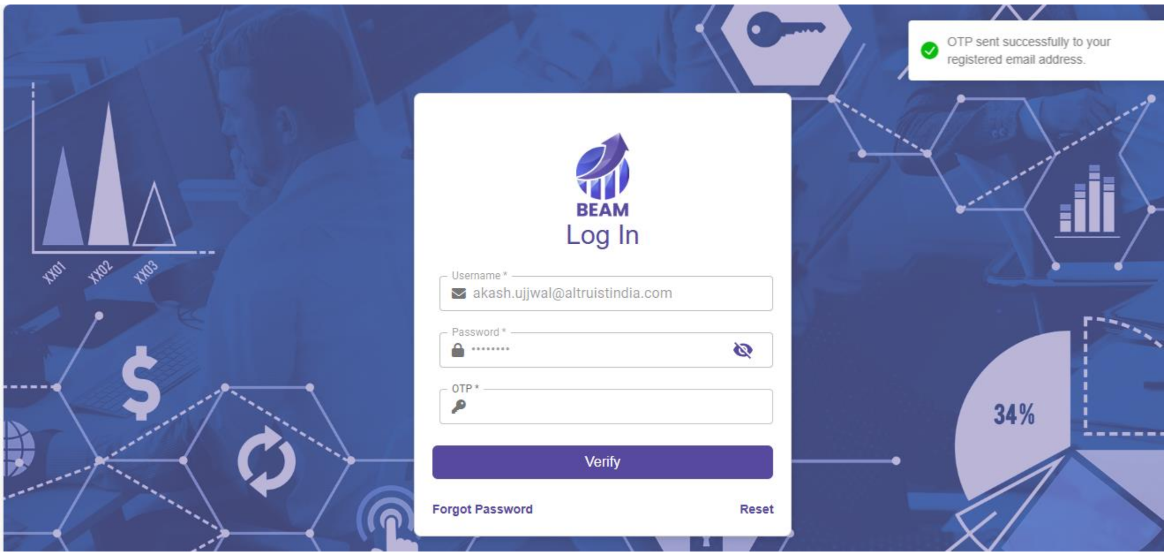
Objective:

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

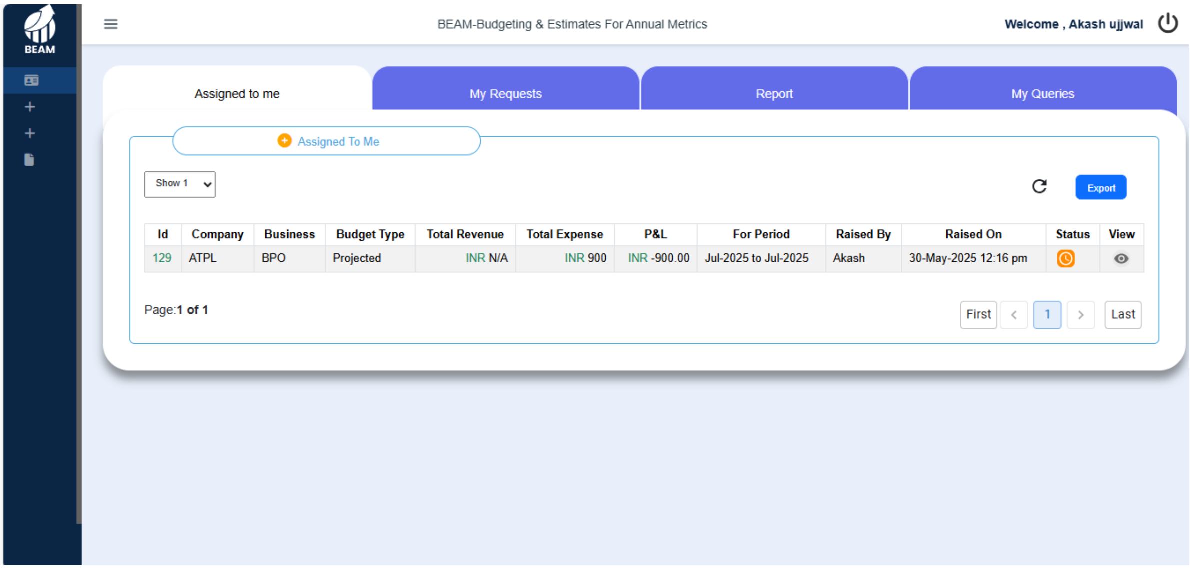


OTP VERIFICATION: Enter OTP Provided to your email address

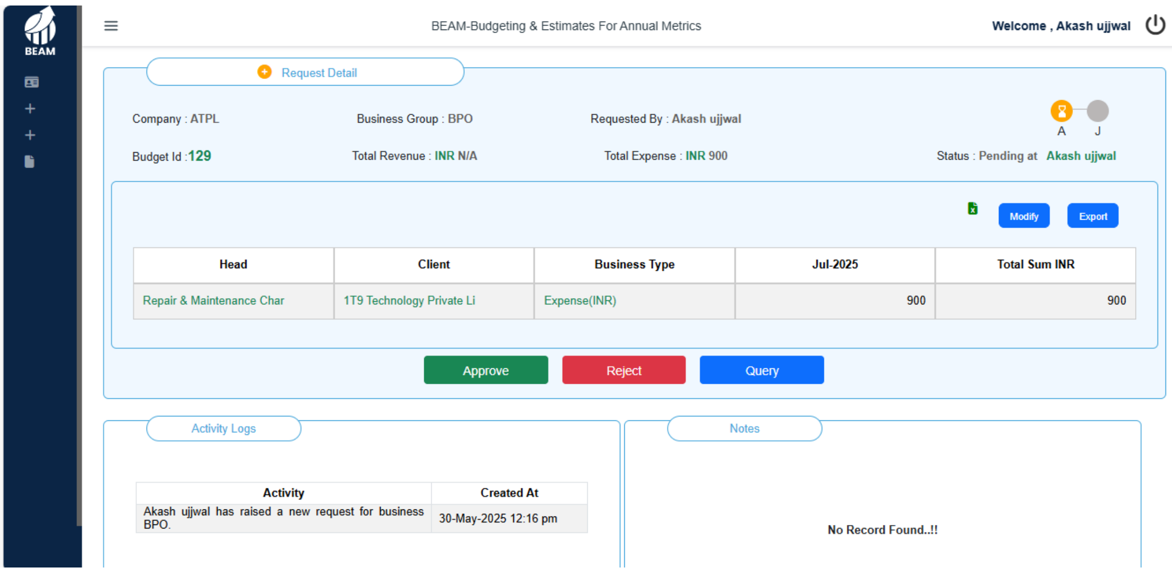


Assigned To Me:

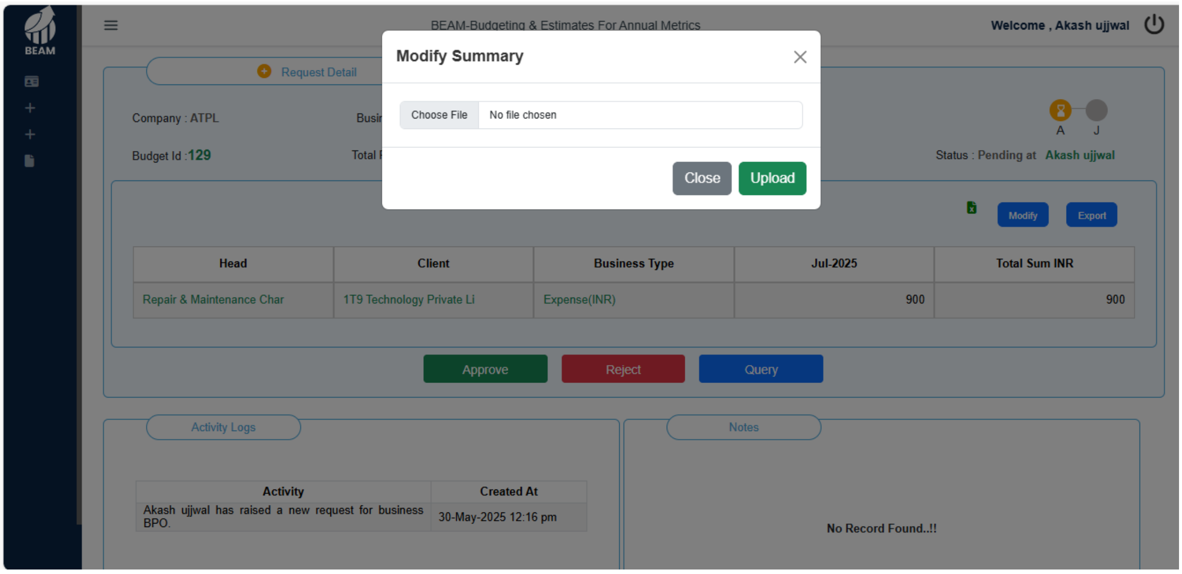
View Request: You can view requests that are assigned to you



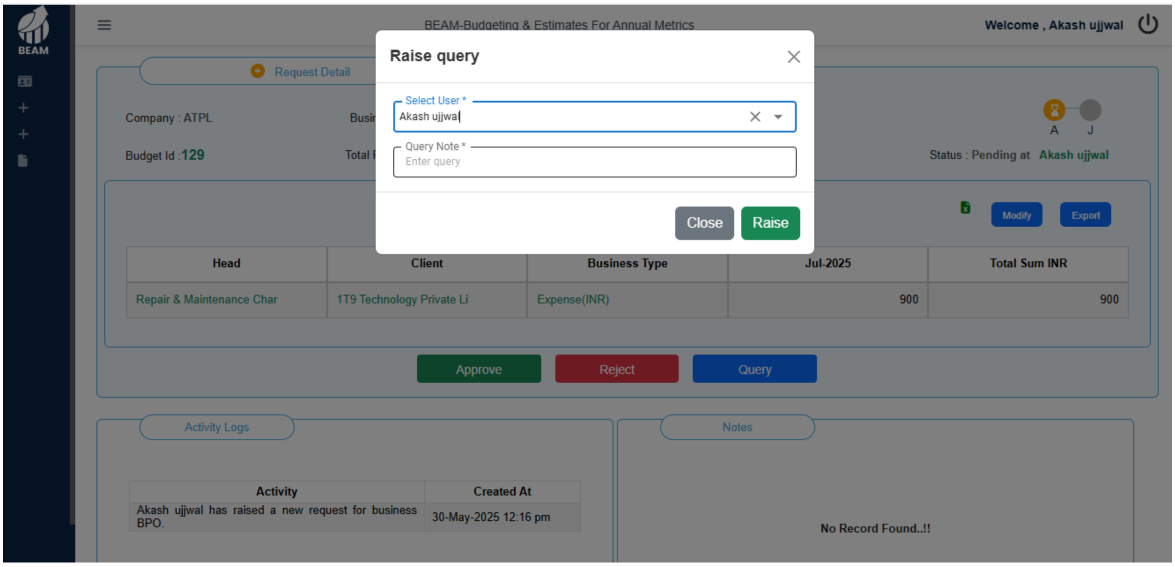
View: Clicking on view button to view whole request, Yu will see multiple options like Approve, reject, query, Modify etc.



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



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



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.

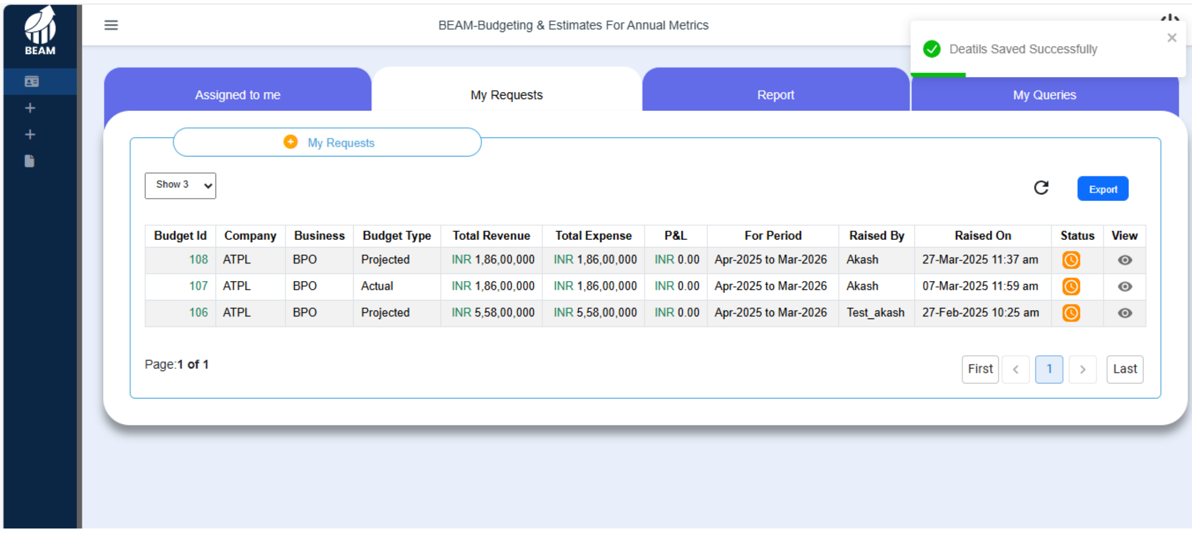
Reject Request: Click on Reject button to reject the request. Then it will reject immediately and will not move forward.

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.



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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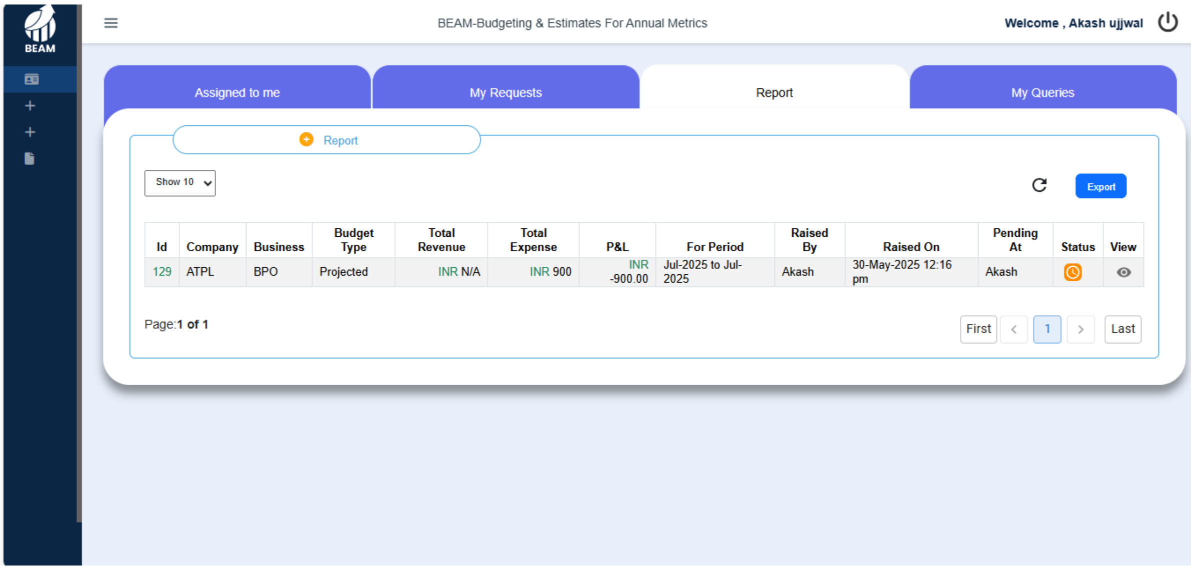
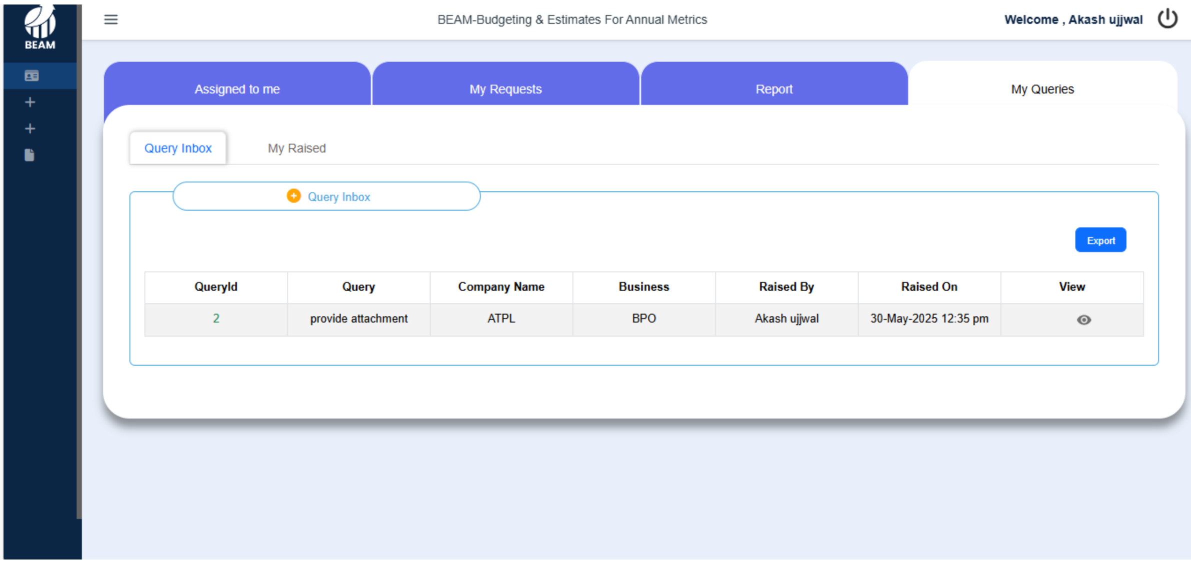


My Queries:

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



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

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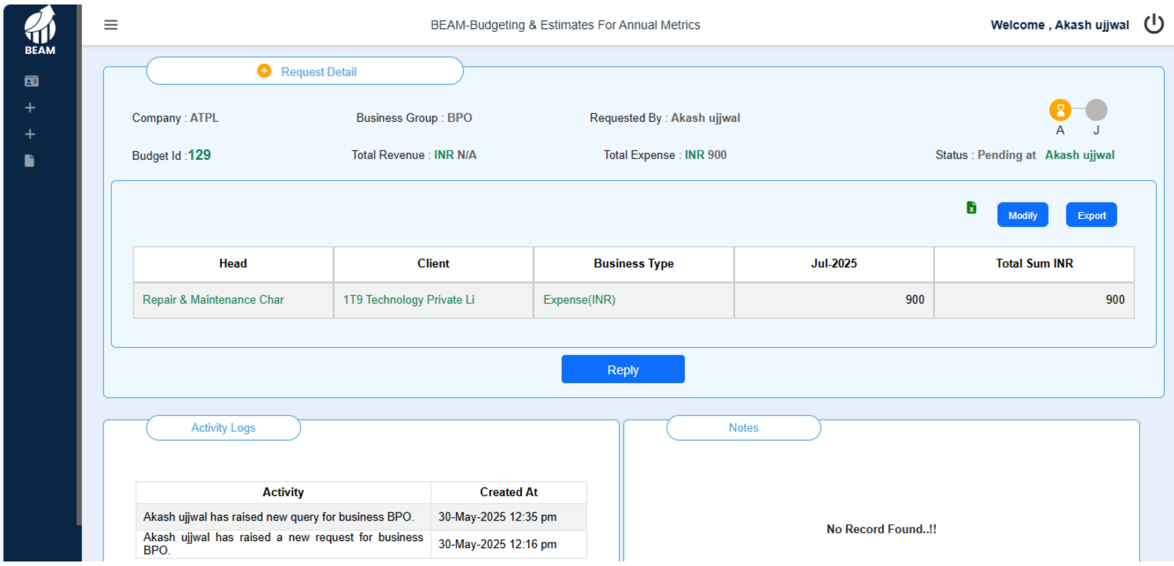
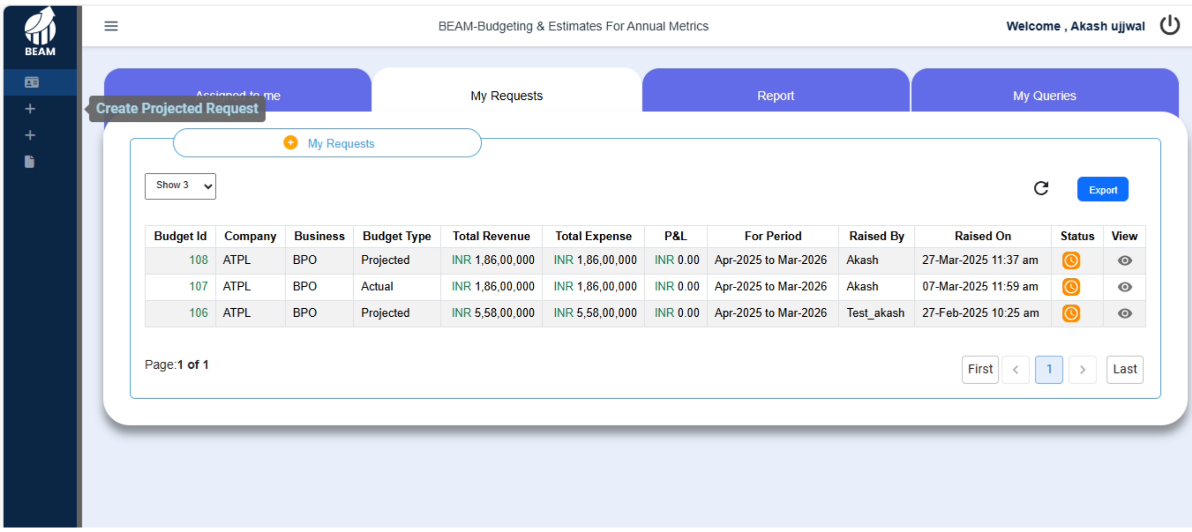


Initiating Projected Request:



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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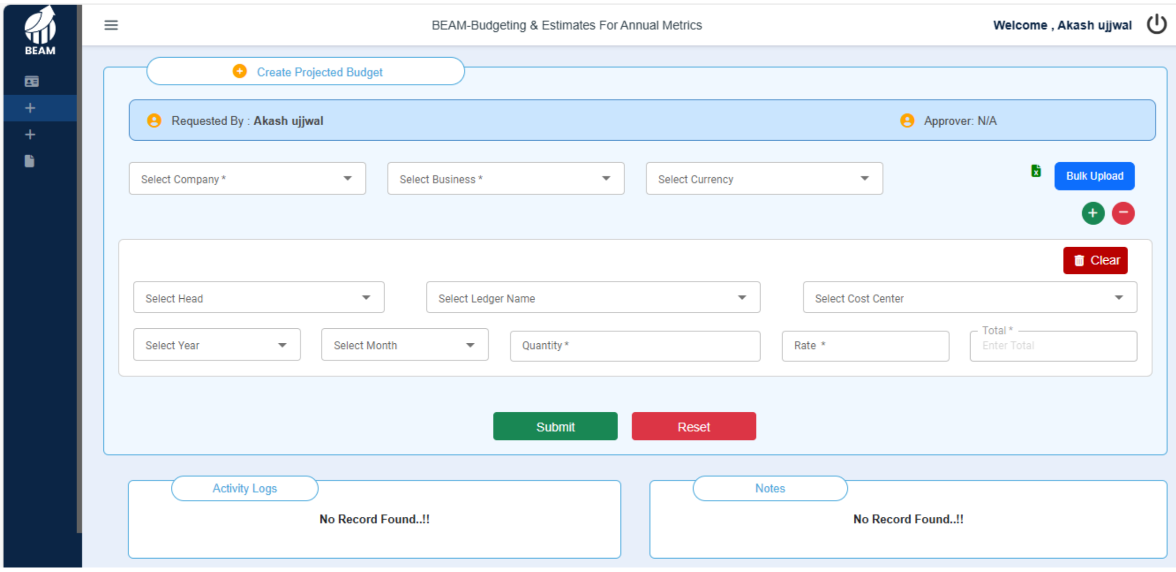
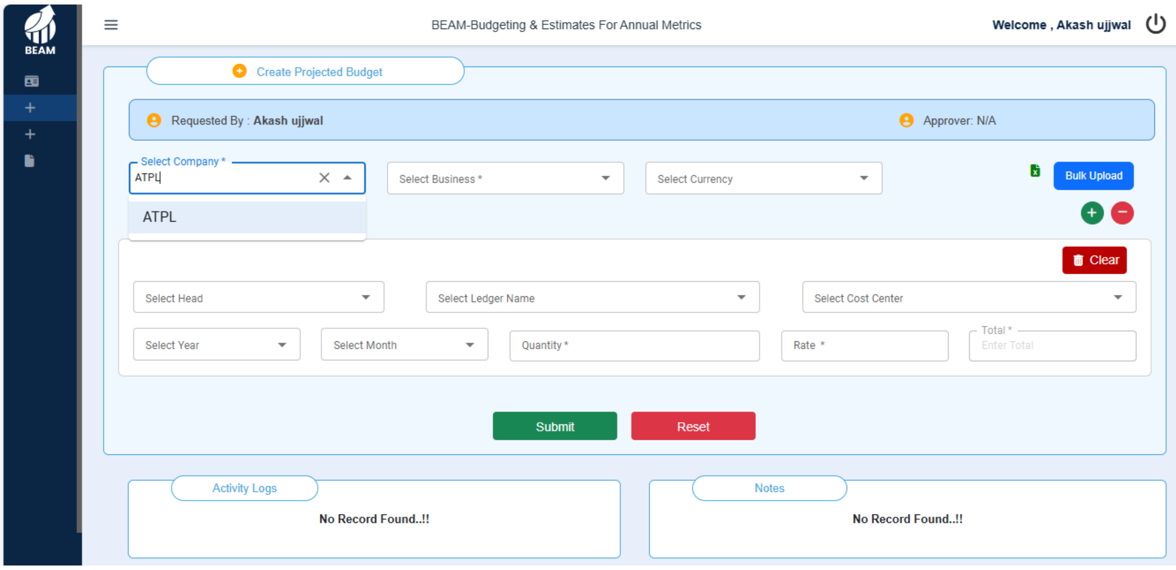


STEP 1:

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



STEP 2:

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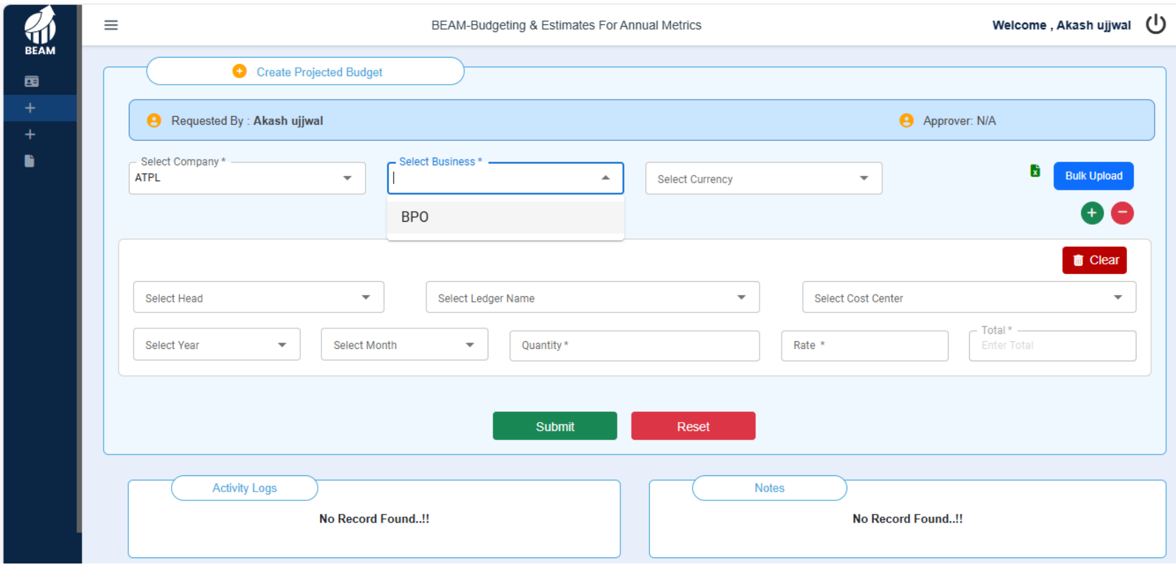
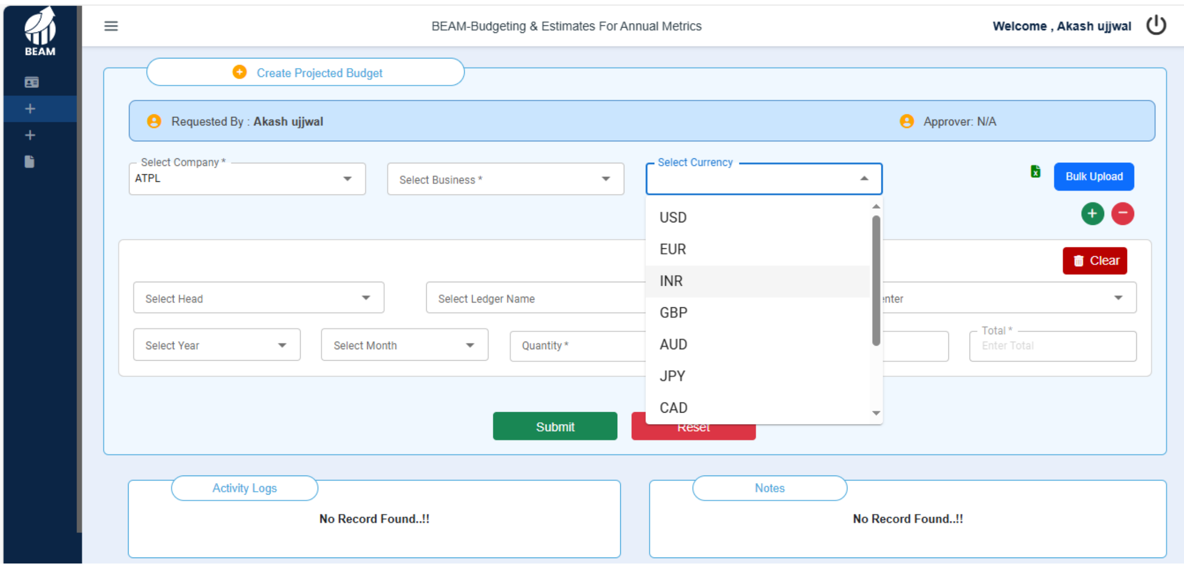
Select Business (Mandatory): Choose the relevant **Business Unit** from the dropdown



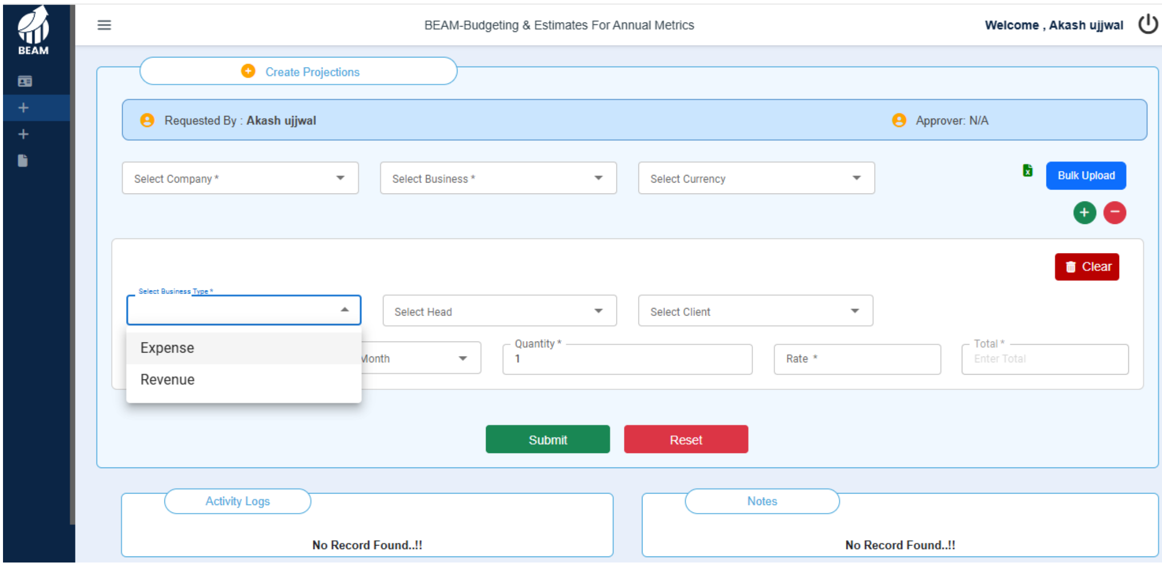
STEP 3:

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



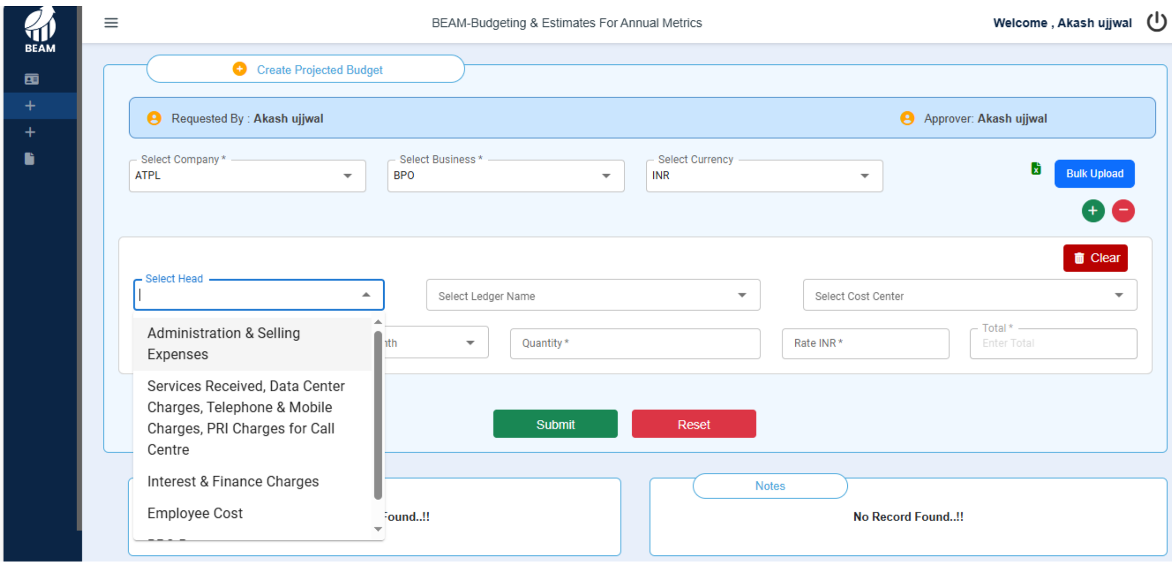
STEP 4:

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



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.)



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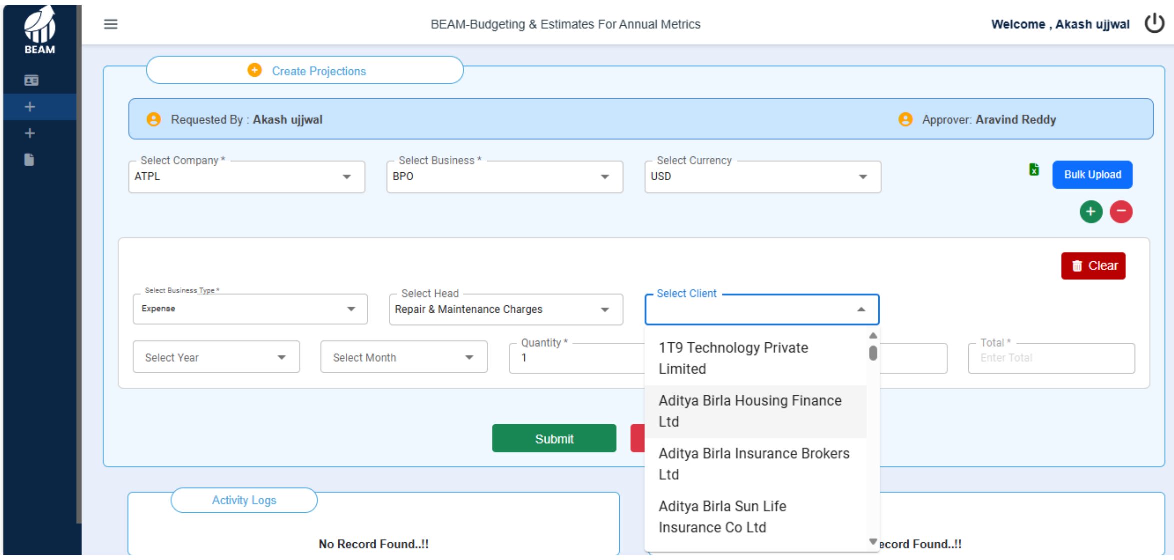
STEP 6:

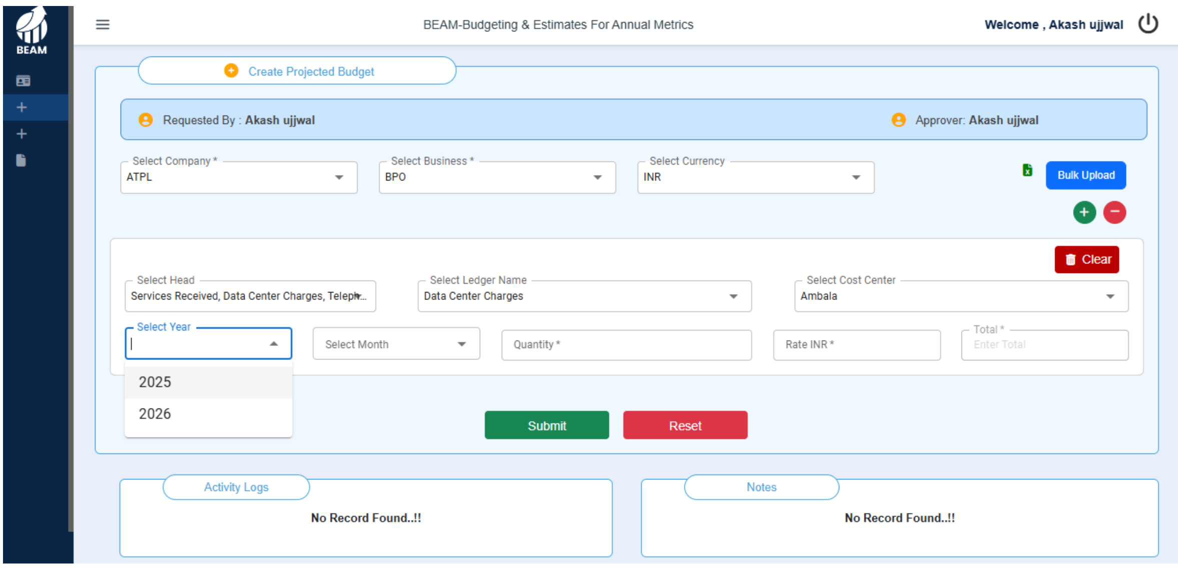
Select Client: Select the **Client** associated with the projection.



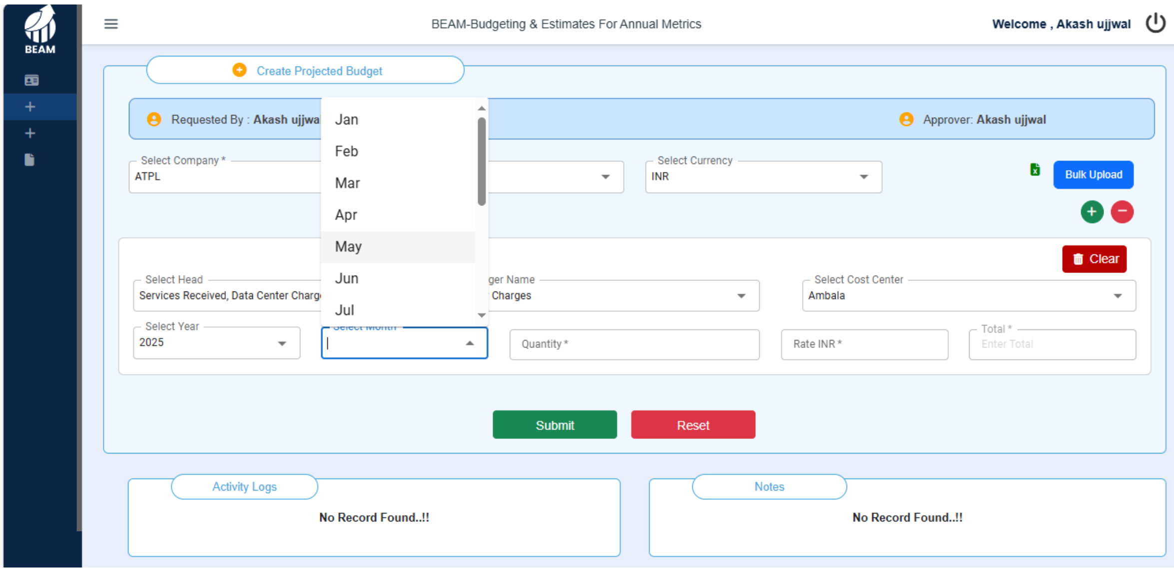
STEP 7:

Time Period Selection

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

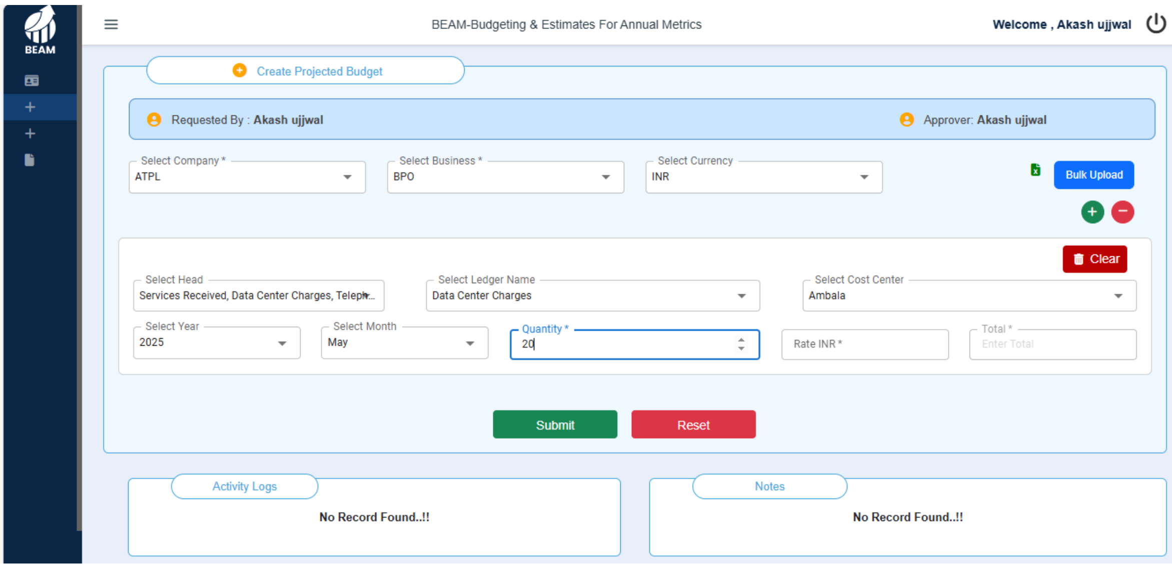


1. **Select Month**: Select the specific month if this is a monthly budget



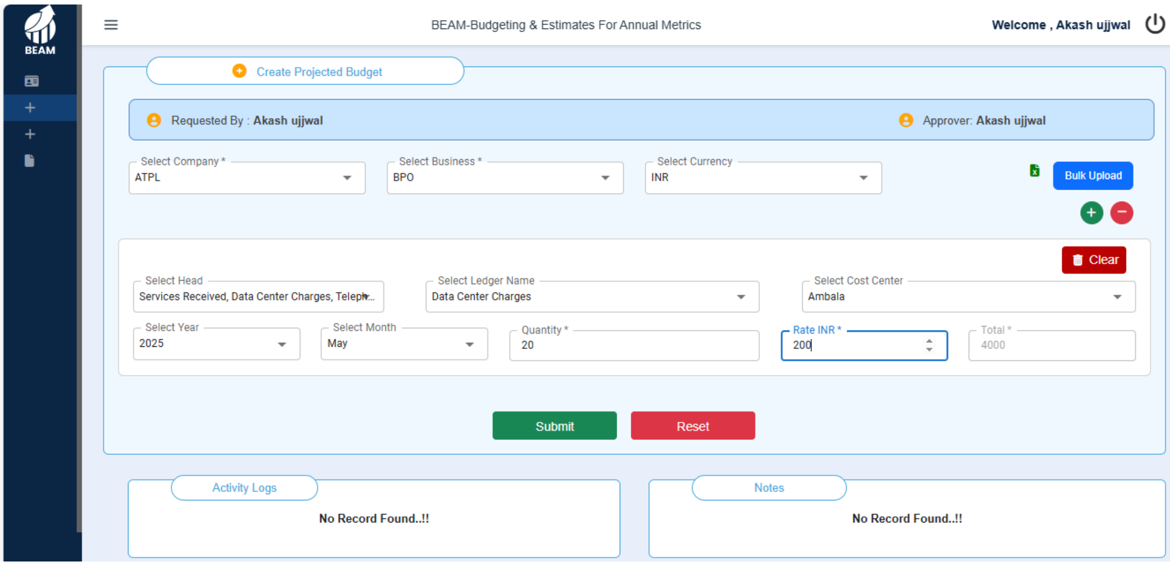
STEP 8:

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



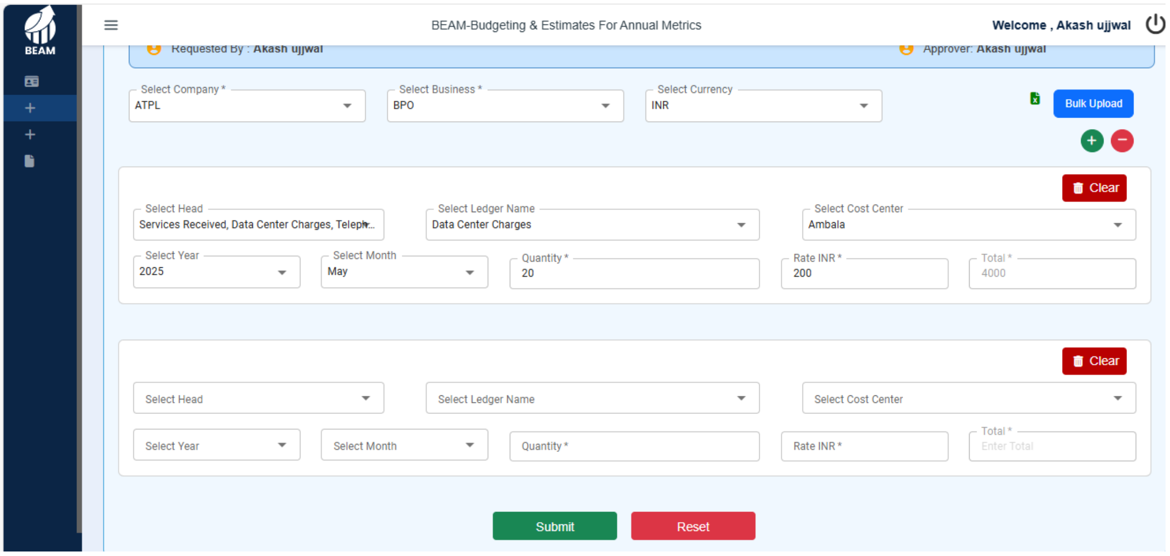
STEP 8:

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



Total Amount:

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



Bulk Upload:

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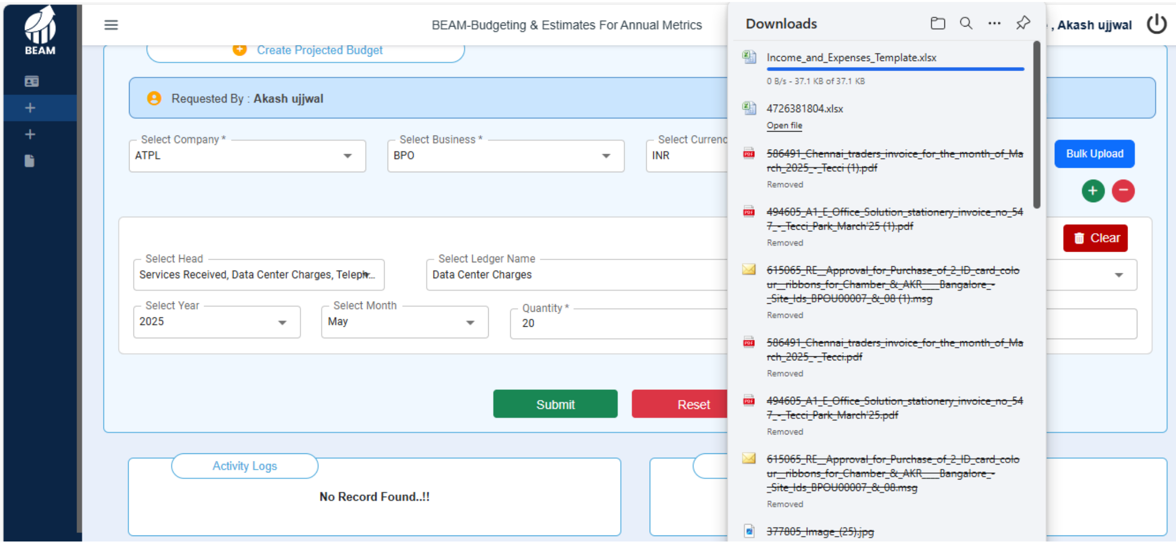
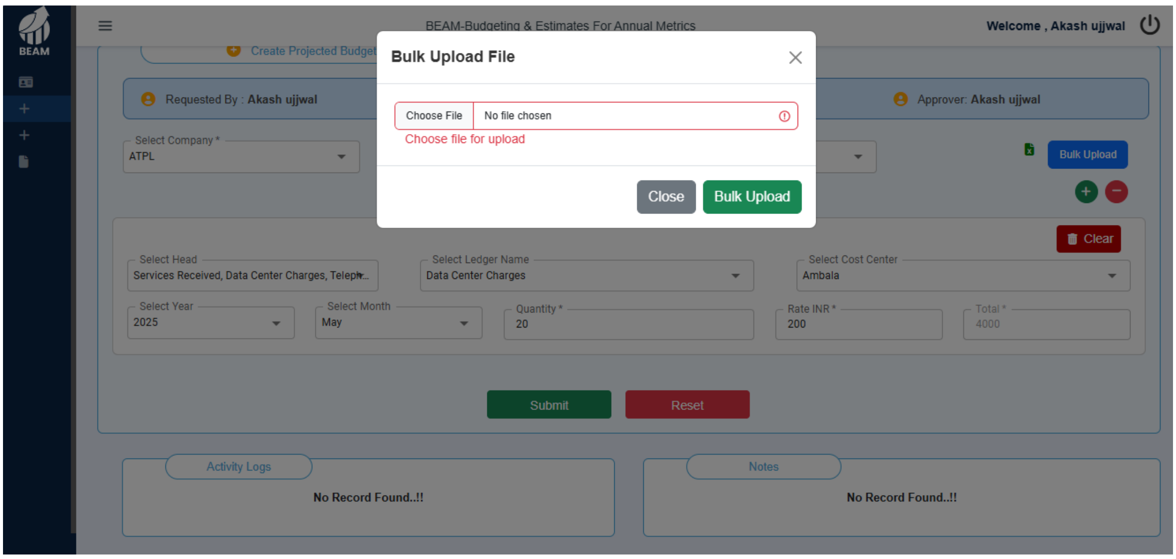
STEP 1:

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 .



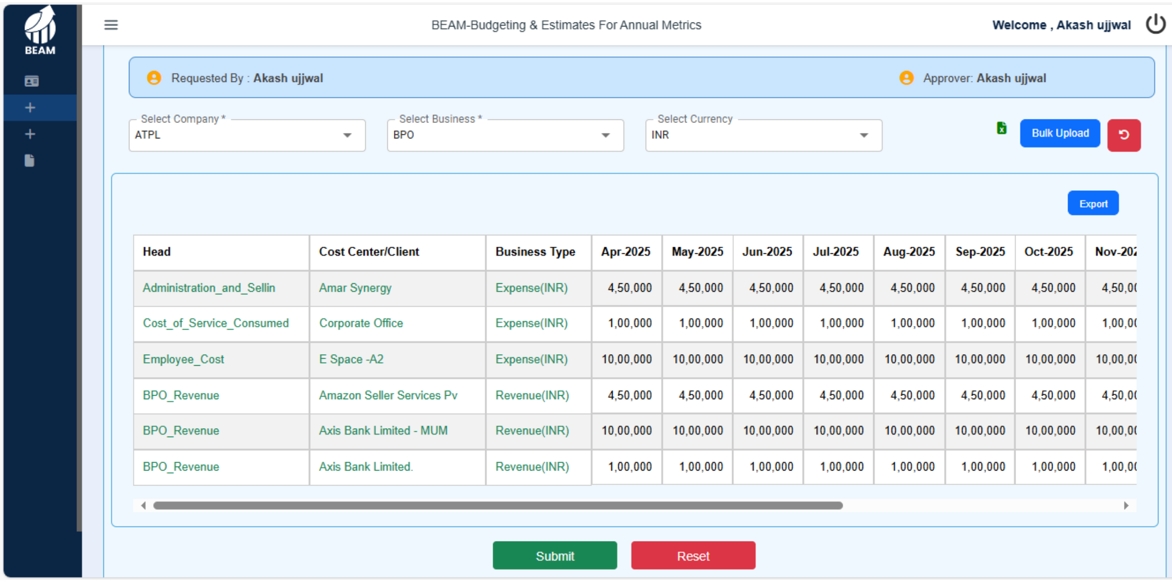
STEP 2:

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



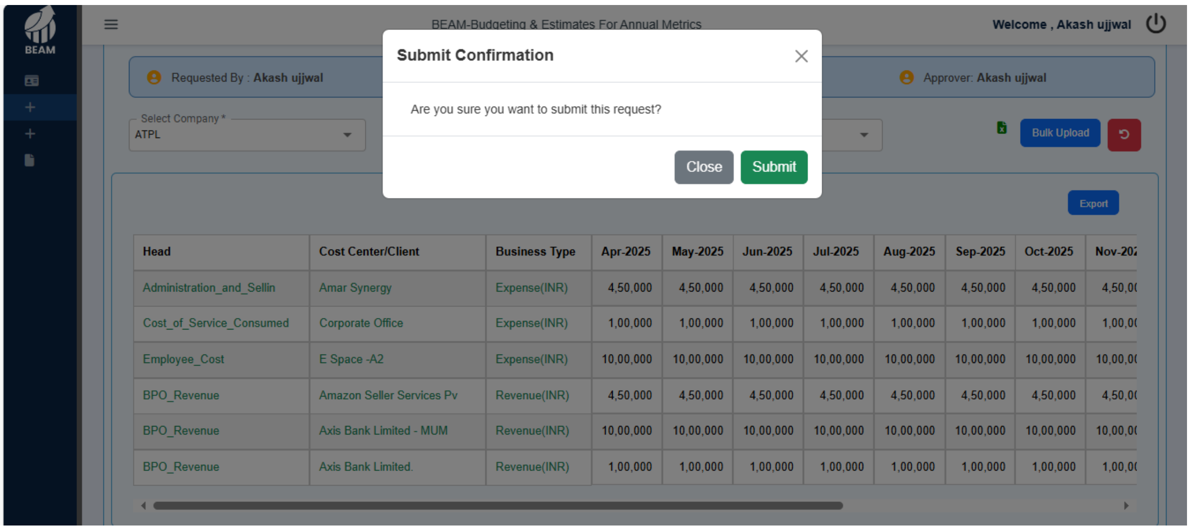
STEP 3:

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



STEP 4:

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



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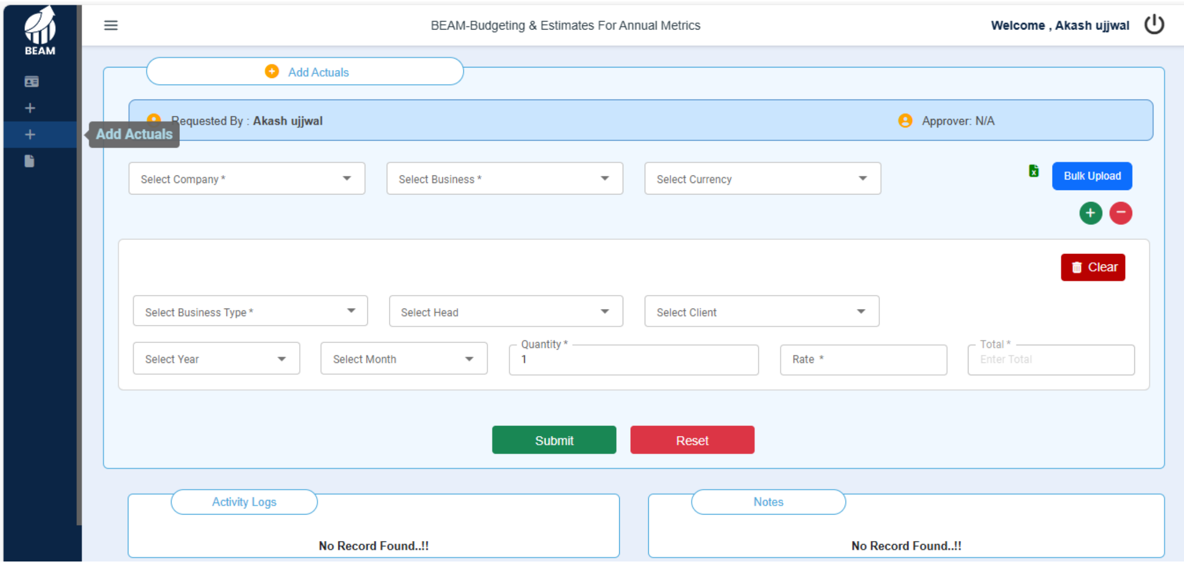
Initiating Actual Request:

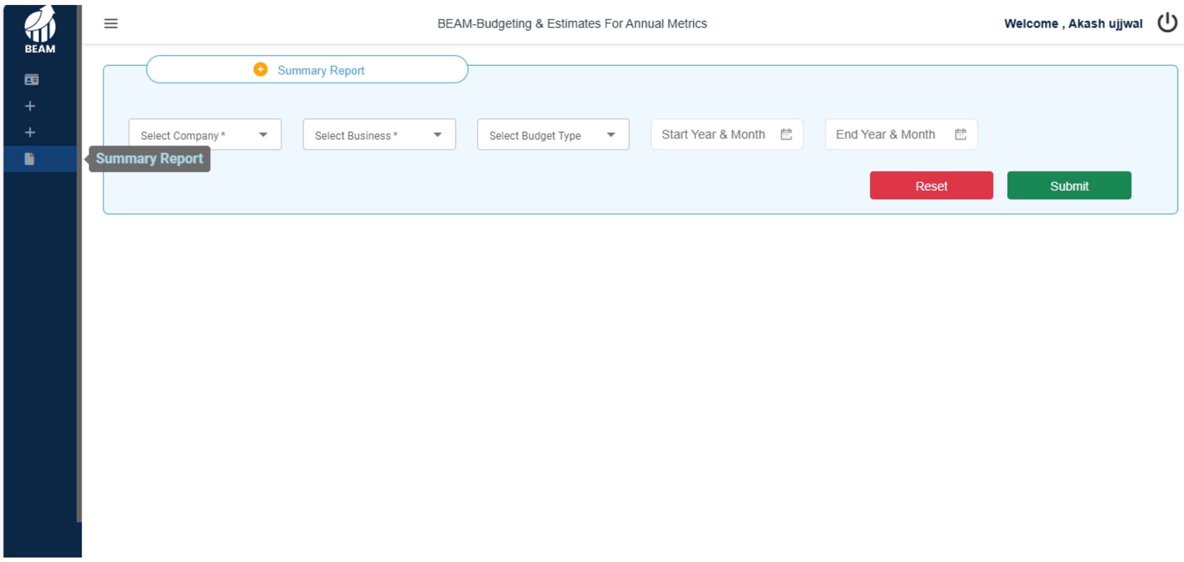
For Initiating **Actual request**, you should follow same procedure as of **creating projection request**



Summary Reports:

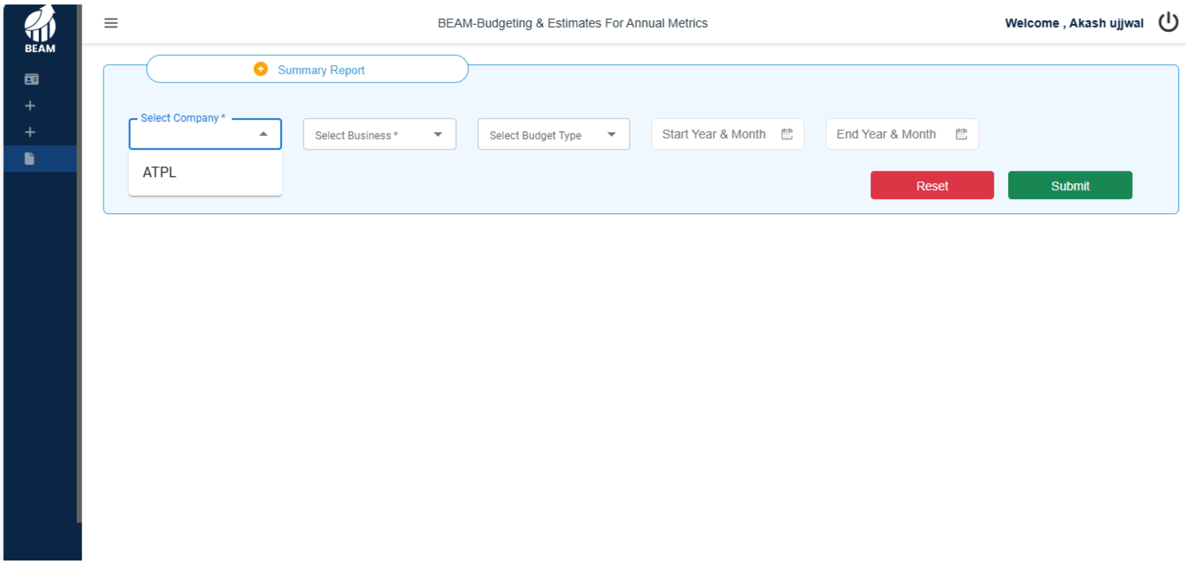
STEP 1:

Go to the **Summary Report** section



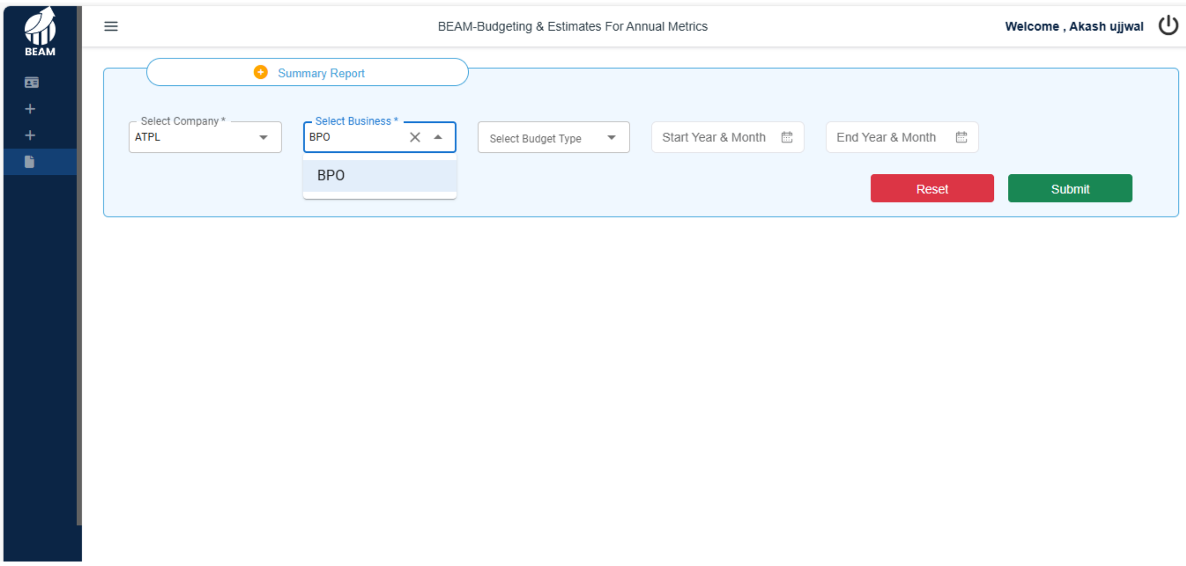
STEP 2:

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



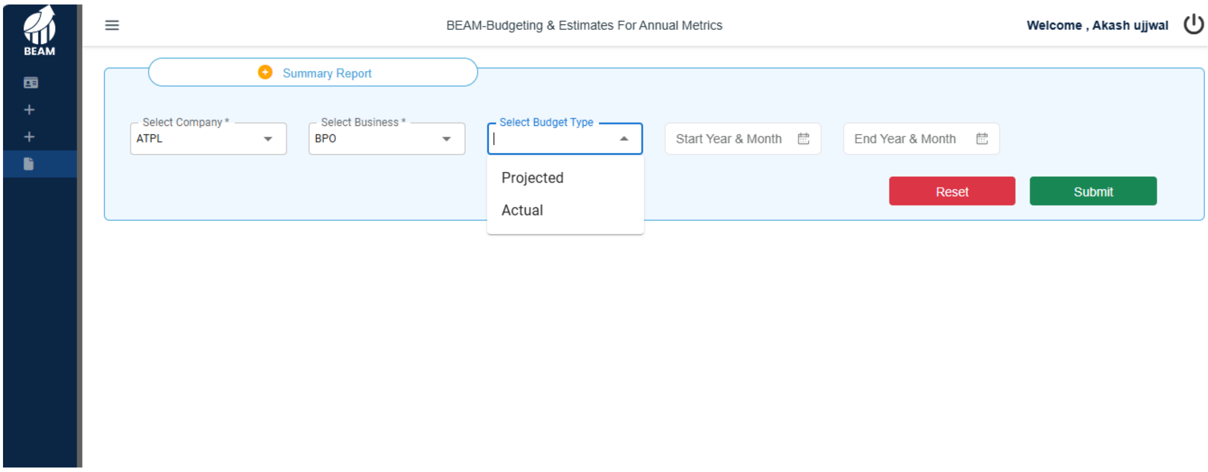
STEP 3:

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



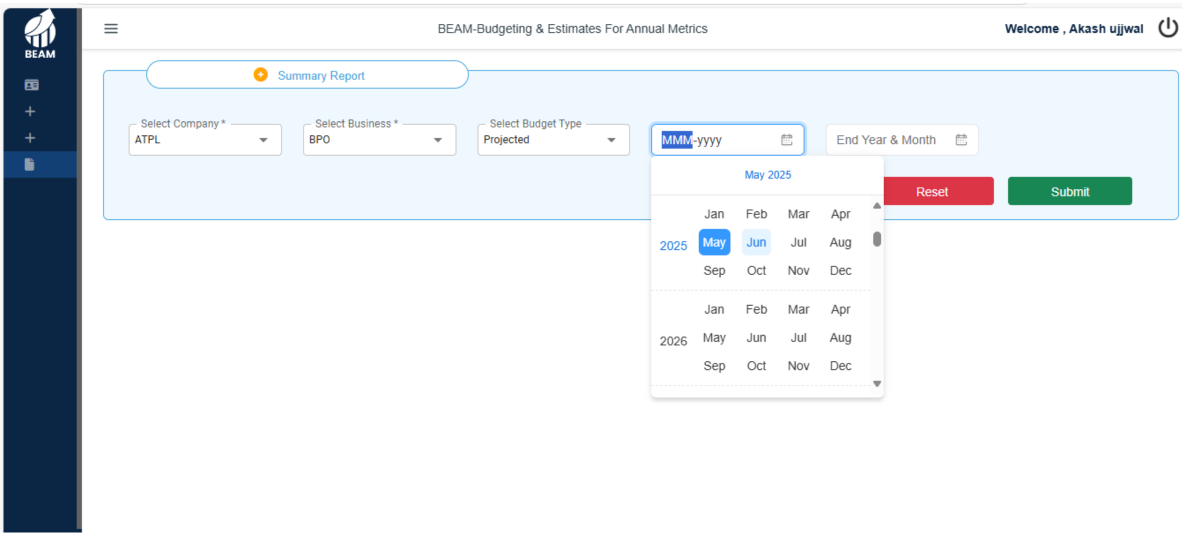
STEP 4:

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



STEP 5:

Select Date Range : Select **Date Range**



STEP 6:

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