

SET UP A NEW BUDGET

There are two custom records that you need to understand to be able to set up any kind of budget with Alterview BOA

Activities	Payments	Transactions	Lists	Reports	Documents	Setup	Customization	Fixed Assets	Support
Record Types									
New Type									
FILTERS									
OWNER <input type="text"/> FROM BUNDLE <input type="text"/>									
SHOW INACTIVES TOTAL: 189									
EDIT	FROM BUNDLE	ID	INTERNAL ID	OWNER	CUSTOM SEGMENT	LIST	NEW RECORD	SEARCH	
Alterview BOA Budget on Anything	225448	customrecord_avns_boa	764	Daniel Sernbo		List	New Record	Search	
Alterview BOA Budget row	225448	customrecord_avns_boa_row	765	Daniel Sernbo		List	New Record	Search	
Alterview BOA Budget type	225448	customrecord_boa_budget_type	766	Daniel Sernbo		List	New Record	Search	
Alterview BOA Localization	225448	customrecord_avns_boa_localization	767	Daniel Sernbo		List	New Record	Search	

Alterview BOA Budget on Anything: This record has two functions:

- Register Budget
- Define records to create budget on

Alterview BOA Budget Type: This record has one function: Define the budget types you like to use. There are several pre defined included, but you can create as many as you like.

Set up a New Budget Type

Alterview BOA Budget on Anything:

This record includes 5 list/records that gives you possibility to create budget based on: CLASS, DEPARTMENT, EMPLOYEE, CUSTOMER, ENTITY.

Custom Record Type

Alterview BOA Budget on Anything

Save Cancel Reset Change ID Actions

NAME

Alterview BOA Budget on Anything

ID

customrecord_avns_boa

INTERNAL ID

764

CUSTOM SEGMENT

OWNER

Daniel Sernbo

DESCRIPTION

☐ INCLUDE NAME FIELD

☐ SHOW ID

SHOW CREATION DATE ☐ ON RECORD ☐ ON LIST

SHOW LAST MODIFIED ☐ ON RECORD ☐ ON LIST

SHOW OWNER ☐ ON RECORD ☐ ON LIST ☐ ALLOW CHANGE

ACCESS TYPE

Require Custom Rec...Entries Permission

☒ ALLOW UI ACCESS

☐ ALLOW MOBILE ACCESS

☒ ALLOW ATTACHMENTS

☒ SHOW NOTES

☐ ENABLE MAIL MERGE

☐ RECORDS ARE ORDERED

☒ SHOW REMOVE LINK ☒ ALLOW CHILD RECORD EDITING ☐ ALLOW DELETE

Fields Subtabs Sublists Icon Numbering Forms Online Forms Permissions Links Managers Translation Child Records Parent Records History System Notes

SHOW INACTIVES

New Field

Move To Top

Move To Bottom

DESCRIPTION	ID	TYPE	LIST/RECORD
Budget For	customrecord_avns_boa_budgettype	List/Record	Alterview BOA Budget type
Class	customrecord_avns_boa_class	List/Record	Class
Department	customrecord_avns_boa_department	List/Record	Department
Employee	customrecord_avns_boa_employee	List/Record	Employee
Customer	customrecord_avns_boa_customer	List/Record	Customer
Entity	customrecord_avns_boa_entity	List/Record	Entity
Period Type	customrecord_avns_boa_periodtype	List/Record	BOA Period Type
Start Date	customrecord_avns_boa_startdate	Date	
End date	customrecord_avns_boa_enddate	Date	
Amount	customrecord_avns_boa_budgetamount	Currency	

If you like to create a Budget based on a record that is not defined above, for example a Custom Record, just click on New Field and add another field. The field should be of the type List/record and point on the record type you like to base your budget on. Follow the naming standard for the internal id: custrecord_avns_boa_<customrecord>.

When the list/record that you like to base your budget on is defined above you go to the record Alterview BOA Budget Type.

Alterview BOA Budget type List List Search Audit Trail

VIEW Default Customise View New Alterview BOA Budget type

FILTERS

STYLE Normal

SHOW INACTIVES EDIT QUICK SORT TOTAL: 6

EDIT VIEW	INTERNAL ID #	NAME	FIELD ID
Edit View	1	Phone Calls per Customer	custrecord_avns_boa_customer
Edit View	2	Phone Calls per SalesRep	custrecord_avns_boa_employee
Edit View	3	Customer Events	custrecord_avns_boa_customer
Edit View	4	Department	custrecord_avns_boa_department
Edit View	5	Class	custrecord_avns_boa_class
Edit View	6	Entity	custrecord_avns_boa_entity

If the budget type you like to have is not defined you have to set it up.
To define a new budget type click on “New Alterview BOA Budget Type”

Alterview BOA Budget type List Search Customise

Save Cancel Reset

NAME * FIELD ID *

☐ INACTIVE

Name: Budget Type a Name – In this example I call it Customer Sales Budget

Field ID: The field id should be any of the field id’s that is defined in the record Alterview BOA Budget on Anything.

Class	custrecord_avns_boa_class	List/Record	Class
Department	custrecord_avns_boa_department	List/Record	Department
Employee	custrecord_avns_boa_employee	List/Record	Employee
Customer	custrecord_avns_boa_customer	List/Record	Customer
Entity	custrecord_avns_boa_entity	List/Record	Entity

The budget type Customer Sales Budget is a budget based on customer, therefor I fil in custrecord_avns_boa_customer in the field ID in this example.

Set up a new budget

Now you are ready to set up a budget. Go to Alterview BOA Budget on Anything and click on “New Alterview BOA Budget on Anything”

Alterview BOA Budget on Anything

VIEW: Default | Customise View | [New Alterview BOA Budget on Anything](#)

FILTERS

STYLE: Normal

Alterview BOA Budget on Anything List Search Customise More

☐ INACTIVE

BUDGET FOR *
Customer Sales Budget

CUSTOMER *
Norman Inc

PERIOD TYPE *
Month

START DATE *
2018-1-1

END DATE *
2018-12-31

AMOUNT
1,200,000.00

NUMBER

ALTERVIEW BOA BUDGET ROW NAME	AMOUNT	NUMBER	DATE
-------------------------------	--------	--------	------

Budget For: Chose the budget type you like to use.

Customer: In this case the budget type is based on customer record and therefor the field customer is showing (if the budget type would have been based on a custom record or department or any other list/record, that list/record should have been send here instead). Chose the customer you like to set up a budget for.

Period Type: You can chose Day, Week, Month or Year. If you chose month, 12 budget rows will be created, if you chose week, 52 rows will be created (if start date is 1 of January and End Date is 31 of December).

Start Date: Chose start date. Usually 1 of January

End Date: Chose end date. Usually 31 of December, same year as start date

Amount: Chose the budget amount for the full period. Your amount will be even distributed among the created budget rows. You use this field if your budget is based on money (example sales by sales rep per month).

Number: Chose the budget number. Your number will be even distributed among the created budget rows. You use this field if your budget is based on numbers (example nr of phone calls made per month).

When you are done, click on Save

Alterview BOA Budget on Anything

← → List Search

[Edit](#) [Back](#) [Update](#) [Actions](#) ▼

☐ INACTIVE
BUDGET FOR
Customer Sales Budget
CLASS
DEPARTMENT
EMPLOYEE
CUSTOMER
Norman Inc
ENTITY
PERIOD TYPE
Month
START DATE
2018-1-1
END DATE
2018-12-31
AMOUNT
1,200,000.00
NUMBER

Rows Notes Files Workflow

VIEW ALTERVIEW BOA BUDGET ROW
Default View

[New Alterview BOA Budget row](#) [Attach](#) [Customise View](#)

EDIT	NAME	AMOUNT	NUMBER	DATE	REMOVE
No records to show.					

[Edit](#) [Back](#) [Update](#) [Actions](#) ▼

When the record is saved click on the update button.

Alterview BOA Budget on Anything

← → List Search

[Edit](#) [Back](#) [Update](#) [Actions](#) ▼

☐ INACTIVE
BUDGET FOR
Customer Sales Budget
CLASS
DEPARTMENT
EMPLOYEE
CUSTOMER
Norman Inc
ENTITY
PERIOD TYPE
Month
START DATE
2018-1-1
END DATE
2018-12-31
AMOUNT
1,200,000.00
NUMBER

Rows Notes Files Workflow

VIEW ALTERVIEW BOA BUDGET ROW
Default View

[New Alterview BOA Budget row](#) [Attach](#) [Customise View](#)

EDIT	NAME	AMOUNT	NUMBER	DATE	REMOVE
Edit	January	100,000		2018-1-1	Remove
Edit	February	100,000		2018-2-1	Remove
Edit	March	100,000		2018-3-1	Remove
Edit	April	100,000		2018-4-1	Remove
Edit	May	100,000		2018-5-1	Remove
Edit	June	100,000		2018-6-1	Remove
Edit	July	100,000		2018-7-1	Remove
Edit	August	100,000		2018-8-1	Remove
Edit	September	100,000		2018-9-1	Remove
Edit	October	100,000		2018-10-1	Remove
Edit	November	100,000		2018-11-1	Remove
Edit	December	100,000		2018-12-1	Remove

Now the Amount is distributed even amongs the budget rows. If you need you can go in and move the amount between the different months to better fit your budget plan.

FOLLOW UP ON YOUR BUDGET

There are several ways to follow up on a budget. In this chapter we gone show you 2 ways to do it

Budget tab

A logic place to find your budget is on the record you have created your budget for. In the above example it is on the customer record.

Step 1: Create a Saved Search: BOA Customer Sales Budget

New Saved Search

AF Current Role

AF Flow descriptions

AF Vendor reasons

Alterview BOA Budget on Anything

Saved Alterview BOA Budget on Anything Search

List Search More

Save Reset Cancel Preview Actions

SEARCH TITLE *

Boa Customer Sales Budget

ID

_boa_customer_sales_budget

☒ PUBLIC

☐ AVAILABLE AS LIST VIEW

☐ AVAILABLE AS DASHBOARD VIEW

☒ AVAILABLE AS SUBLIST VIEW

☐ AVAILABLE FOR REMINDERS

☐ SHOW IN MENU

Criteria Results Highlighting Available Filters Audience Roles Email Audit Trail Execution Log Search Title Translation

Use this tab to specify criteria that narrow down your search.

☐ USE EXPRESSIONS

Standard Summary

FILTER *	DESCRIPTION *	FORMULA
Budget For	is Customer Sales Budget	

Save Reset Cancel Preview Actions

Search Title: Give the search a title (we suggest you follow naming standard BOA + budget type)

Available as Sublist View: Check this checkbox to be able to include on tab on customer record.

Criteria

Filter: Budget For: Chose your budget type

Criteria Results Highlighting Available Filters Audience Roles Email Audit Trail Execution Log Search Title Translation

Use this tab to indicate columns to be included in the search results as well as sort order.

SORT BY: Start Date DESCENDING

THEN BY: DESCENDING

THEN BY: DESCENDING

OUTPUT TYPE: Normal

☒ SHOW TOTALS

MAX RESULTS

☐ RUN UNRESTRICTED ☐ DISALLOW DRILL DOWN

☐ MY PREFERRED SEARCH RESULTS

Columns • Drill Down Fields •

Remove All Add Multiple

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Start Date								
Amount								

Add Cancel Insert Remove Move Up Move Down Move To Top Move To Bottom

Sort by: Start Date

Fields

Start Date

Amount (if the budget is based on money)

Number (if budget is based on numbers)

Criteria Results Highlighting **Available Filters** Audience Roles Email Audit Trail Execution Log Search Title Translation

Limit the set of filters available on the form when you reuse this search, or to set filters for the results (such as when used as a list view). Remove all filters to use advanced search.

☐ MY PREFERRED SEARCH FORM ☐ HIDE FILTER DROPDOWNS DEFAULT TEXT FIELD FILTER starts with ▼

Remove All Add Multiple

FILTER *	SHOW IN FILTER REGION	SHOW AS MULTI-SELECT	LABEL
Customer			

Filter: Customer (if budget is based on customer you chose customer here)

Step 2: Create a Search for Actual Result

Step 2: Set up a Budget Tabs

ORACLE NETSUITE altview Search Daniel Sernbo A Demo OneWorld SRPv15.1 Expire OFF TSTD0V1276476 - Admin

Activities Payments Transactions Lists Reports Documents Setup Customization Fixed Assets Support

Home

Settings

- Personalize Dashboard
- Set Preferences
- Publish Dashboard List
- Campaign Subscription Center
- Change Email
- Change Password
- Update Security Questions
- Manage Access Tokens

New Release

Kanban - Sales Opportunities

Customization Manager

- Lists, Records, & Fields
- Forms
 - Subtabs
 - Entry Forms
 - Transaction Forms
 - Advanced PDF/HTML Templates
 - Transaction Form PDF Layouts
 - Transaction Form HTML Layouts
- Scripting
- Workflow
- Plug-ins
- Centers and Tabs
- SuiteBundler

Set date settings Personalize

Navigation: Customize → Forms → Subtabs

Custom Subtabs

Save Cancel

Transaction *	Entity *	Item *	CRM *
TITLE *	TRANSLATION	PARENT	FROM BUNDLE
Budgets			

Create a new Tab: Budgets

Custom Subtabs

Save Cancel

Transaction *	Entity *	Item *	CRM *
TITLE *	TRANSLATION	PARENT	FROM BUNDLE
Budgets			
Sales Budget		Budgets	

Create a second tab: Sales Budget. Chose Budgets as Parent.

Step 3: Set up a Sublist

Activities Payments Transactions Lists Reports Documents Setup Customization Fixed Assets Support

Custom Subtabs

Save Cancel

Transaction *	Entity *	Item *	CRM *
TITLE *	TRANSLATION	PARENT	FROM BUNDLE
Budgets			
Prof. Services			
Tax Reporting			
Bank Payment Details			
Partners	Danish: Partneri German: Partner Japanese: パートナー Swedish: Partners		
Opportunities	Danish: Pfliebsti		

Customization Manager

- Lists, Records, & Fields
- Forms
 - Subtabs
 - Entry Forms
 - Transaction Forms
 - Advanced PDF/HTML Templates
 - Transaction Form PDF Layouts
 - Transaction Form HTML Layouts
- Scripting
- Workflow
- Plug-ins
- Centers and Tabs
- SuiteBundler

Address Forms Sublists

Navigation: Customize → Forms → Sublists

Custom Sublists

Save

Cancel

Transaction *	Entity *	Item	CRM
SEARCH *	LABEL *	TRANSLATION	TAB
Boa Customer Sales Budget	Sales Budget	Budgets:Sales Budget	Yes
BOA Actual Sales	Actual Sales	Budgets:Sales Budget	Yes

Search: chose your search

Label: Set lable for subtabe

Tab: Chose the tab you created

Customer: Check the entity where to show your budget, in this case Customer

Repeat this step for both searches.

Step 4: See the Result

Customer

Norman Inc

Edit Back Accept Payment Update LSA 360 ACC Printout TEST Alterview 2 Print Alterview Support Report Print Statement Print Support Report Actions

Primary Information

CUSTOMER ID	Norman Inc	SALES REP	Larry Nelson	DEFAULT ORDER PRIORITY
TYPE	Company	PARTNER		COMMENTS
COMPANY NAME	Norman Inc	WEB ADDRESS	http://www.dn.se	
STATUS	CUSTOMER-Closed Won	CATEGORY	Corporate	

E-post | Telefon | Address

PHONE	+4685554600	FAX	+4685554610	ADDRESS
EMAIL	finance@norman-inc.com			Norman Inc Drottninggatan 78 Stockholm 16100 Sweden Map

Klassificering

PRIMARY SUBSIDIARY	Sweden AB	CUST SEGMENT1
CATEGORY	INDUSTRY	EAN
<input type="checkbox"/> REFERENCEABLE		LAST MODIFIED DATE
<input type="checkbox"/> HOT LEAD		2017-8-6
ANNUAL REVENUE (€)		<input type="checkbox"/> WITH ACTIVE CONTRACT
NO. OF EMPLOYEES		EMAIL ADDRESS FOR PAYMENT NOTIFICATION
		GLN
		LAST SALES ACTIVITY
		7/24/2017 7:46

Relationships Communication Address Sales Financial Preferences System Information Custom Budgets Graphs

Sales Budget

EDIT	START DATE *	AMOUNT
Edit	2018-1-1	1,200,000.00
Total		1,200,000.00

Open the customer and control the result

If you like to compare your budget to an actual number, just add another search

In this exemple we create a BOA Actual Sales Search

Saved Transaction Search

Save & Run Reset Cancel Preview Actions

SEARCH TITLE *

BOA Actual Sales

ID

_boa_actual_sales

☒ PUBLIC

☐ AVAILABLE AS LIST VIEW

☐ AVAILABLE AS DASHBOARD VIEW

☒ AVAILABLE AS SUBLIST VIEW

☐ AVAILABLE FOR REMINDERS

☐ SHOW IN MENU

Criteria Results Highlighting Available Filters Audience Rules Email Audit Trail Execution Log Search Time Translation

USE EXPRESSIONS

Standard Summary

FILTER *	DESCRIPTION *	FORMULA
Type	is Invoice	
Main Line	is true	

Add Cancel Insert Remove

Save & Run Reset Cancel Preview Actions

Criteria
Results
Highlighting
Available Filters
Audience
Roles
Email
Audit Trail
Execution Log
Search Title Translation

Use this tab to indicate columns to be included in the search results as well as sort order.

SORT BY
Date
DESCENDING

THEN BY
DESCENDING

THEN BY
DESCENDING

OUTPUT TYPE
Normal

CONSOLIDATED EXCHANGE RATE
Per-Account

☒ SHOW TOTALS

☐ RUN UNRESTRICTED

☐ MY PREFERRED SEARCH RESULTS

☐ DISALLOW DRILL DOWN

Columns • Drill Down Fields •

Remove All
Add Multiple

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL
Formula (Text)	Group		TO_CHAR((trandate), 'YYYY-MM')				
Amount	Sum						
Name							
Transaction Number							

Add
Cancel
Insert
Remove
Move Up
Move Down
Move To Top
Move To Bottom

Criteria
Results
Highlighting
Available Filters
Audience
Roles
Email
Audit Trail
Execution Log
Search Title Translation

Limit the set of filters available on the form when you reuse this search, or to set filters for the results (such as when used as a list view). Remove all filters to use advanced search.

☐ MY PREFERRED SEARCH FORM

☐ HIDE FILTER DROPDOWNS

DEFAULT TEXT FIELD FILTER
starts with

Remove All
Add Multiple

FILTER *	SHOW IN FILTER REGION	SHOW AS MULTI-SELECT
Name		

Add
Cancel
Insert
Remove
Move Up
Move Down
Move To Top
Move To Bottom

Save & Run
Reset
Cancel
Preview
Actions

Customization
Fixed Assets
Support

Customization Manager

Lists, Records, & Fields

Forms
Sublists

Scripting
Entry Forms

Workflow
Transaction Forms

Plug-ins
Advanced PDF/HTML Templates

Centers and Tabs
Transaction Form PDF Layouts

SuiteBundler
Transaction Form HTML Layouts

Address Forms

Sublists

Navigation: Customization → Forms → Sublists

Custom Sublists

Save
Cancel

Transaction •	Entity •	Item	CRM				
SEARCH *	LABEL *	TRANSLATION	TAB	CUSTOMER	JOB	VENDOR	EMPLOYEE
Boa Customer Sales Budget	Sales Budget		Budgets	Yes			
BOA Actual Sales	Actual Sales		Budgets	Yes			
BOA Budgeted Revenue Allocation	Budgeted Revenue		Budgets				

Add the new search.