Bonitasoft

BUDGETING PROCESS

Whether you are a CFO, purchasing director, controller, or accountant - the Corporate Finance processes you manage are critical to the day-to-day operations of your organization.

The budgeting process is a substantial exercise imposed every year on every organization. And it is too often a nightmare for everyone involved.

## Validate and read Excel files
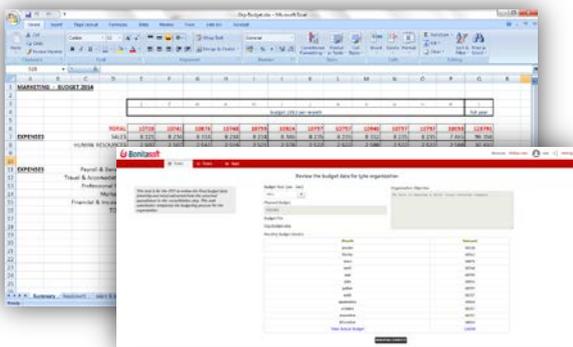
Excel™ is one of the most widely used tools for budgeting. Improve your usage by automatically soliciting, collecting, versioning and validating the content of your Excel files.

Connect to your ERP
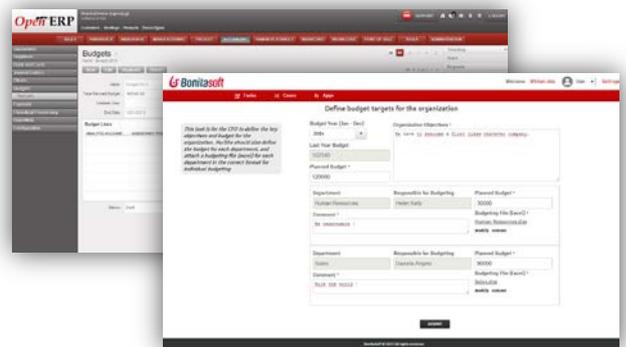
Entering the same data in multiple places is very likely to introduce errors (not to mention a pain) in the budgeting process. See how Bonita BPM connects easily to your favorite ERP.

Alert and remind
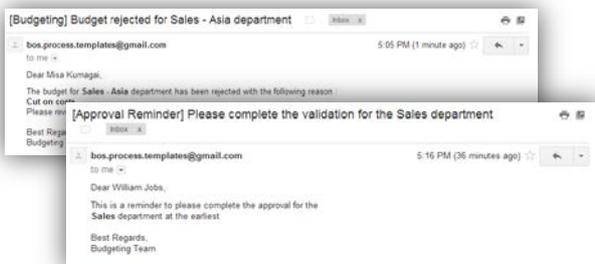
Alert users when an action is required, and define deadlines for reminders to make sure your budgeting process is not stuck.

Monitor key milestones in budgeting

Track key milestones by department to accurately report budgeting progress.

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Process templates – easy to start, easy to extend

A process template is a pre-built, optimized business solution, built using BPM best practices to accelerate your project and reduce the time to implement.

- Download it from the Bonitasoft Customer Portal and import it directly into Bonita BPM Studio.
- Start with the template, and customize it to your specific needs. All the source code is provided.
- Access to all process templates comes with Bonita BPM *Efficiency* and *Performance* Subscriptions.

The Budgeting process template

The *Budgeting* process template follows recursive budgeting process:

- The CFO defines budgets and goals for the coming year.
- Excel files for budget calculations are automatically sent out to all managers responsible for budgeting.
- At each level of the organization, the manager can define department goals.
- Budget managers upload their budgets in the Excel format, and the system validates it.
- Managers validate their team's budget inputs.
- The CFO consolidates and validates the company's budget.

Other process templates

Employee Leave Management

Approve and manage requests for time off, insure clear communication about absences, and maintain business continuity when employees are away.

360 Customer Support

Manage your customer support along with the growing use of mobile services, changing user habits, and the wide variety of information systems in use today.

Onboarding

Bring value to the entire business through HR process automation. Align your onboarding process with the corporate strategy of reducing costs through increased efficiency.