



Farmplan gatekeeper

Budgets

Using the budgeting module in Gatekeeper

 Proagrica

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Introduction

Budget planning in Gatekeeper

The budgeting module is an optional extra which may be activated in Gatekeeper to allow the user to forecast costs and purchases. Several different budgets may be built, adjusted, and compared as required.

Budgets fall into two categories, production or strategic.

Production Budgets are based on fields and their planned crops for the budgeted year. It is therefore necessary to have fields and crops set up in the year that the budget will be created for. Production budgets may be built from scratch or based on previous years' field records.

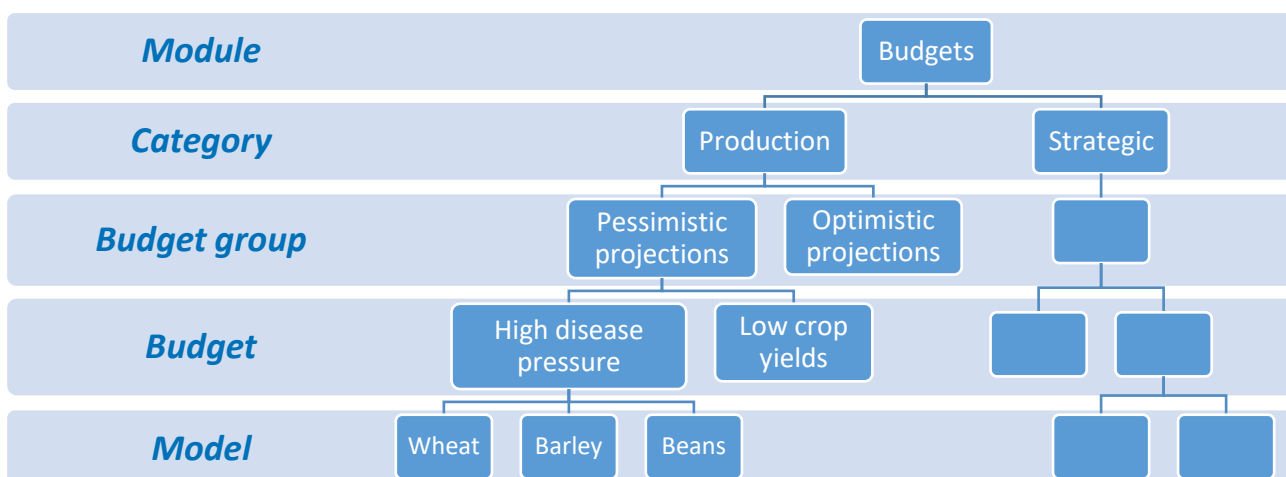
Strategic Budgets are based on enterprises, and have no fields assigned to them. They are useful for testing the profitability of a new venture, or when limited information is available (for example, if you are new to Gatekeeper and don't have detailed field records).

Each budget consists of series of models, which each reflect an enterprise or crop.

A budget model is the set of jobs making up the complete plan for the growing of a crop, and can be considered to be the equivalent of a large work plan in the planning module – models will consist of a number of jobs, each with product(s) and rates.

For each of these jobs, figures may be entered at the heading level (e.g., 'Fertiliser'), or the product level (e.g., Nitram). It is simple to create budget jobs at the product level by copying an entire season of actual jobs from a previous year from a representative field.

Fields may only appear in one model per budget, but may be moved between models if required.



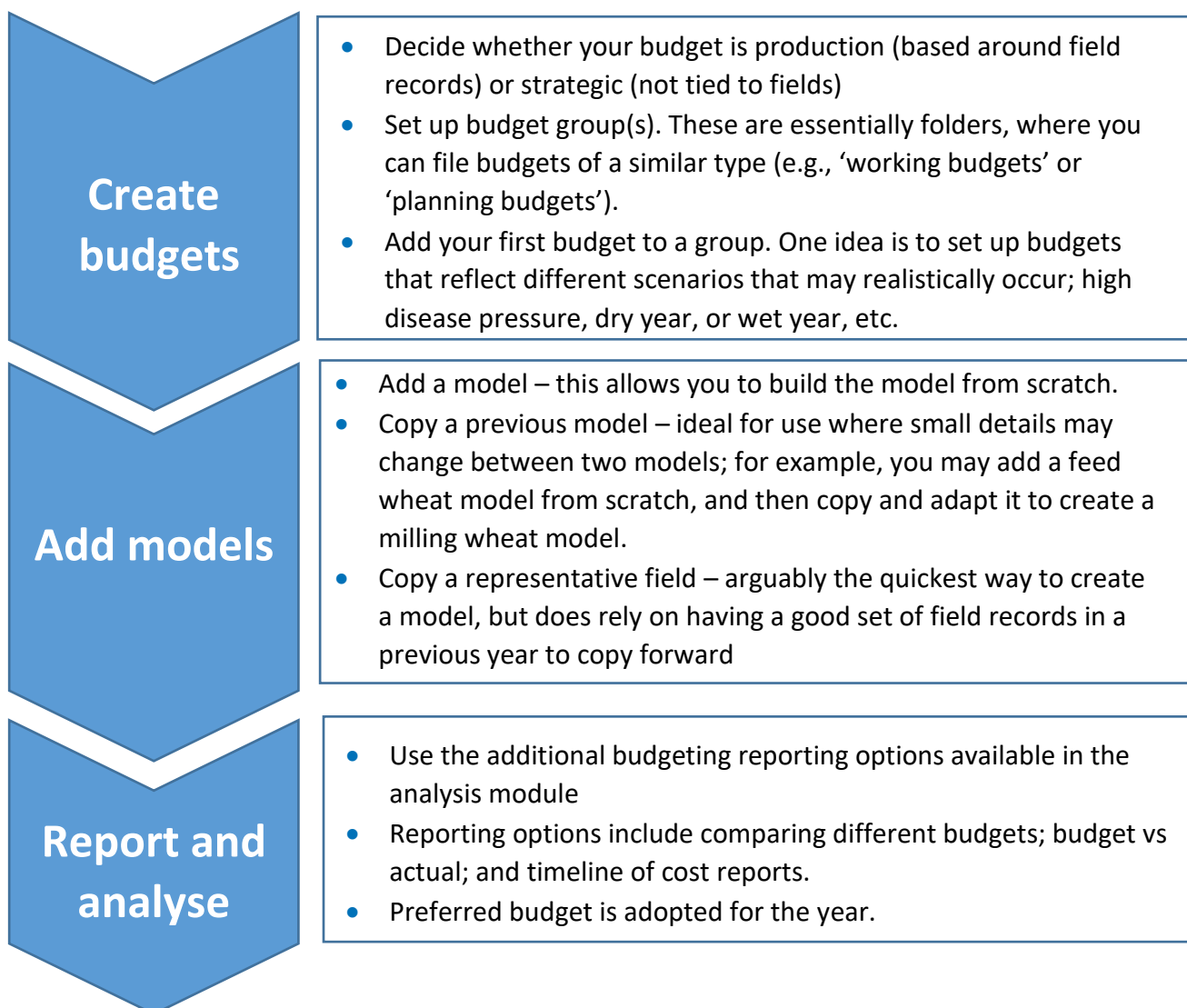
Each model then contains a number of jobs, reflecting the various activities planned for the fields in question, and the costs associated.

Principles of use

The budgeting module allows the user to build and organise a number of different possible scenarios as different budget groups and budgets. The models within these budgets may be based on previous records, built from scratch, or a mixture of both as required.

Many budgets can be set up in a group for planning and comparison purposes, but only one model can be 'adopted' – the adopted model is the default for reporting purposes, and allows you to build planning jobs based on the budget as required later in the season.

The typical budgeting module workflow can be seen below.

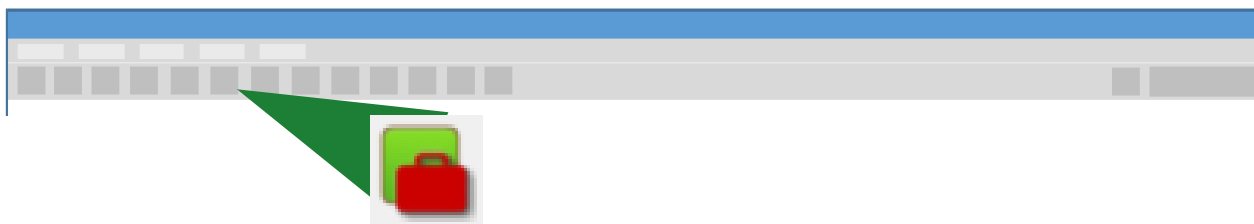


When building budgets, bear in mind the following features:

- A single field can only be in one model within a budget; you cannot include the same field in more than one model. Therefore if you wish to compare different treatment options for the same field, you will need to build more than one budget.
- The analysis module can only compare budget against budget – not model against model. Therefore if you wish to compare different scenarios, they must be built as separate budgets, not models within the same budget.

Creating budgets

The budgeting module is opened from the main Gatekeeper screen with the icon shown below:

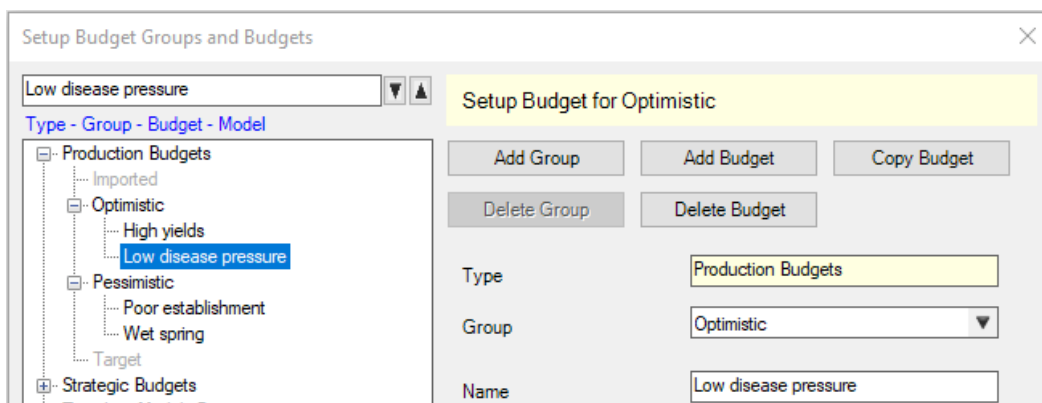


Adding budgets

Before beginning: users with more than one business may wish to consider whether their budget should be built as a budget, or as a template. For more information, please see [Template budgets](#), (p.10).

To add a budget, from the budgeting module screen:

1. Click 'Setup Budgets'
2. From the tree view on the left hand side, select the type of budget you wish to add (e.g., production or strategic)
3. By default, there are four groups visible but inactive – imported, optimistic, pessimistic, and target. You can either:
 - a. Use one of these default groups, by:
 - i. Selecting the group
 - ii. Moving the dot selector to 'Active'
 - iii. *Optional:* adding a comment to describe the group, or:
 - b. Add a new group, by:
 - i. Clicking 'Add Group'
 - ii. Entering group name
 - iii. *Optional:* adding a comment to describe the group.
4. With the group still selected from the tree view on the left hand side:
 - a. Click 'Add Budget'
 - b. Enter budget name
 - c. *Optional:* add a comment to describe the budget
5. Repeat steps 2-4 as required if adding multiple budgets
6. Click 'OK' to save and close



Adding models to a production budget

Please note before proceeding: to create a production budget for a future cropping year, you will need to have added the fields into the planning year with intended cropping before you can build models.

Once a budget has been created, models are added for each cropping scenario. So for example, if a budget is being created for an arable farm, in the budget 'High yields', there may be models for wheat, barley, oilseed rape, and beans. If the barley grown is a split between feed and malting, there would be two different barley models to reflect this.

There are three methods to create a model against a budget:

New Model Method	Information	Useful for
Add a new model	Create jobs and dates completely from scratch.	Where no existing models or past field records can be copied; or when a new crop or management style is being considered
Copy the selected model	Copy an existing model so that it can then be edited as required	Making small adjustments to an existing budget model: for example, an existing feed barley model could be copied and then edited for malting barleys.
Copy representative field	Copy the cropping record of a field from a previous year to create a model. Model can be edited after copying if required.	Quickly adding a complete model by choosing a representative field from a previous season.

Add a new model

Use this method to build example jobs from scratch, to create a template model. You will be able to create multiple jobs inside the model to represent all the applications to a crop in a season.

From the budgeting module screen:

1. Check that you are in the required cropping year
2. Select the budget in question from the tree view on the left hand side
3. Click 'Add Model'

The screenshot shows the Farmplan software interface. At the top, there is a menu bar with options: Setup Budgets, Add Model (highlighted with a green box), Update Prices, Publish, Setup Fields, Reports, and Close. Below the menu bar, the main area is divided into two sections. On the left, there is a tree view under 'Production Budgets' with 'High yields' selected and highlighted with a green box. On the right, the main content area shows 'Budget: High yields' and 'Model: All Models'. Below this, there is a table with columns: Field Group, Crop, Variety, Field, Area ha, and Model. The table contains two rows of data:

Field Group	Crop	Variety	Field	Area ha	Model
	Barley Winter	Barley Winter	Field 07	18.00	
	Beans Dried Winter	Beans Dried Winter	Field 09	20.00	

4. Ensure the 'New model method' selected is 'Add a new model', and click 'Add Model'
5. Select the field(s) to be included in the new model

6. You will be taken to a model screen. Enter a model reference (e.g., 'Wheat'), and click 'Add Job >>':

7. Add a job into the model by:
- Either, to add a new job from scratch:
 - Ensuring 'Create a new job by:' selector is on 'Adding a new job'
 - Clicking 'Add Field Operation Job'
 - Or, to copy an existing job from another model:
 - Changing the 'Create a new job by:' selector to 'Copying from the selected job'
 - Selecting the job to copy from the list on the left hand side
 - Clicking 'Copy Field Operation Job'

NB – if you use this method, skip to step F below.
 - Or, to copy an existing job from a previous cropping year:
 - Changing the 'Create a new job by:' selector to 'Copying from the selected job'
 - Adjusting the harvest year you wish to copy from
 - Clicking 'Planning/Recording'
 - Selecting the job to copy from the list on the left hand side
 - Clicking 'Copy Field Operation Job'

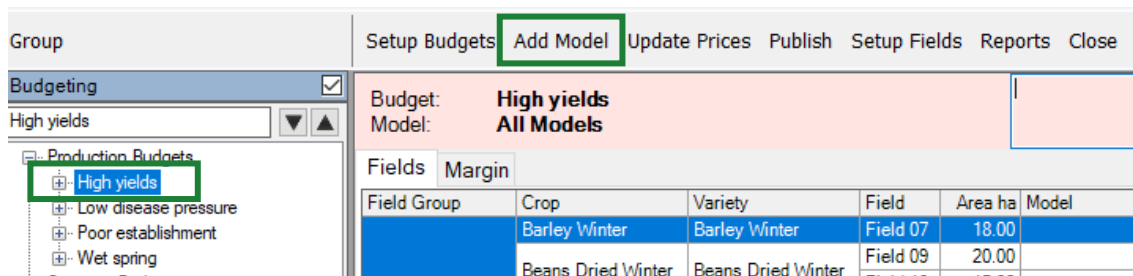
NB – if you use this method, skip to step F below.
 - Select the product(s) to use in the job and enter a rate and unit price
 - Optional:* if prompted and in use, select an implement
 - Enter a predicted job date
 - If you will want to create cashflow budgets, also enter a payment date by either:
 - Selecting a payment date, or
 - To create payment dates for all jobs in the model, enter the number of days from job date to payment date, and click 'Update all Payment Dates'. If used, this method should be saved for the final job in the model.
 - Optional:* if required, add a job reference, reason, or comment on the job header tab.
8. Repeat as required to add more jobs into the model, remembering to save regularly.

Copy a selected model

Use this method to copy an existing model, and then edit it as required. Please note - this will only copy a single model, not entire budget – if you wish to copy an entire budget, please see [Copying budgets](#) (p.10).

From the budgeting module screen:

1. Check that you are in the required cropping year
2. Select the budget in question from the tree view on the left hand side
3. Click 'Add Model'

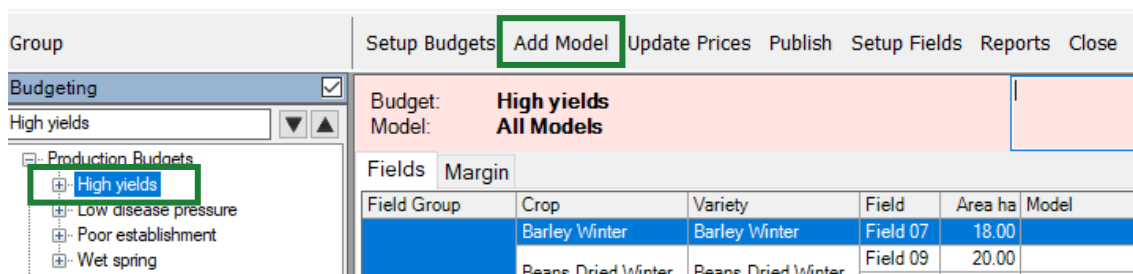


4. Ensure the 'New model method' selected is 'Copy the selected model'
5. Select the harvest year to copy from
6. Select the model to copy
7. Click 'Copy Model'
8. Select the field(s) to be included in the new model
9. You will be taken to a completed model. Edit any of the jobs within the model as required, remembering to save regularly.

Copy representative field

Use this method to copy all the activities from a field's cropping record in a previous year to form the basis of a model. The jobs may then also be edited as required. From the budgeting module screen:

1. Check that you are in the required cropping year
2. Select the budget in question from the tree view on the left hand side
3. Click 'Add Model'



4. Ensure the 'New model method' selected is 'Copy representative field'
5. Change the 'Harvest year' drop down to select the season you wish to copy records from
6. Click the '...' icon and select your representative field (this is the field you are using as a template to create the series of jobs for the model)
7. Select the required level of detail for the model:
 - a. 'Heading totals' if total spend per heading is sufficient for your budget requirements (i.e., 'Fungicides', 'Herbicides', etc)
 - b. 'Product totals' if total spend per product is sufficient for your budget requirements (i.e., Aviator Xpro, Barclay Gallup, Centium 360, etc)
 - c. 'Product jobs' if you want to have the flexibility to adjust individual job totals, timings, etc.
8. Select the correct job source
9. Select whether prices should be sourced from 'job target or job actual data'

10. Click 'Copy Field'
11. The field selector page will appear again. Select all fields you wish to be applied to this model (that is, the fields in the budget's target year that should use the model just created)
10. You will be taken to a completed model. Edit any of the jobs within the model as required, remembering to save regularly.

The model has been created in the budget and can be viewed and edited as required – please see [After a model has been built](#) (p.11).

Remember to repeat for other crops as required until a complete budget has been built.

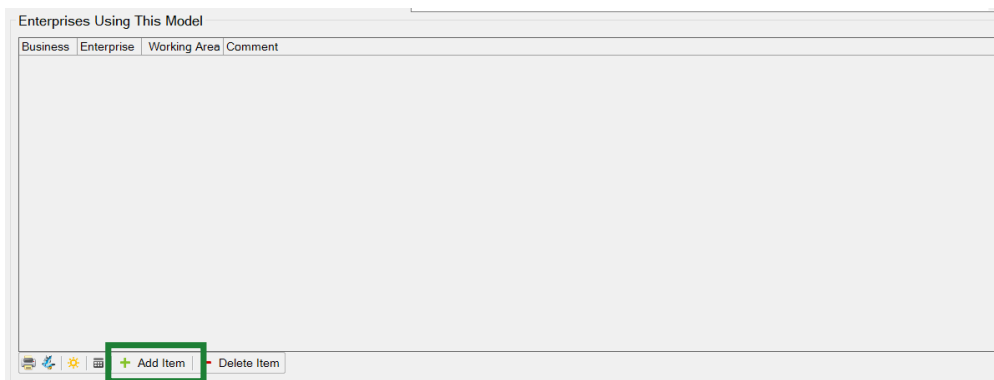
Adding models to a strategic budget

Strategic models differ to production budgets in that they are not specifically connected to field records. Therefore, in order to be able to create and scale a budget, the user creates 'Enterprises', which give an area over which costs are being predicted.

An example of how enterprises might be used could be: a budget is being created to consider entering into a contract farming arrangement. When a model is created, rather than selecting the fields it should be applied to (as in a production budget), an enterprise is created with the area to be used in the model.

To add models to a strategic budget, follow the steps as detailed above for [production budgets](#), (p.6), but you will not be asked to select fields at any point. Instead, once the model has been created, use the following steps to assign an enterprise:

1. Go to the 'Model' tab
2. Underneath the 'Enterprises using this model' section, click '+ Add Item'



3. Name the enterprise by either:
 - a. Selecting a crop name (enterprises are often based around the area that will be grown of a specific crop), or
 - b. Typing in a name for the enterprise
4. Enter an area for the enterprise
5. *Optional*: add a descriptive comment
6. *For users with multiple businesses*: repeat if required for additional businesses
7. 'OK' to save and close.

Copying budgets

It is possible to copy budgets, to create a duplicate of an existing budget. This can be a useful option where the majority of a models' jobs will be the same, with a few changes. Any models and jobs within a copied budget will be duplicated.

To copy a budget, from the main budgeting screen:

1. Click 'Setup Budgets'
2. Select the budget to copy from the list on the left hand side
3. Click 'Copy Budget'
4. Either:
 - a. Select a pre-existing budget to copy the models into – this action will **replace** any models already existing in the budget, or
 - b. Enter a name for a new budget to be created with the copied data, replacing 'NEW'
5. Click 'Copy'
6. 'OK' to save and close.

Once a budget has been copied, models and jobs may be edited as required – see [Editing models](#) (p.12).

Template budgets

There are three types of budget template which may be built, to enable budgets to be created more efficiently. Setting up a template budget (rather than a budget) will be useful for any situation where you are likely to want to use a very similar budget either on a year-to-year basis, or across businesses, to avoid duplication of work.

Template type	Information	Useful for
Template Models (Business)	Templates built will only be visible within the specific selected business	Creating models which you may wish to use in more than one year
Template Models (Site)	Templates built will be visible across any businesses on the selected site	Creating models which you may wish to use in more than one business
Template Models (Organisation)	Templates shared at an organisation level. If visible, only the site catalogue manager will be able to create or edit organisation templates	Sharing models across multiple sites in an organisation which uses the organisation catalogue

When building template budgets, you will not be able to assign fields. These can only be added when the template model is copied into a product model for the required cropping year.

To add template budgets, the process is very similar to adding production or strategic budgets. You will need to select or add a budget group; add a budget; and then add models as required.

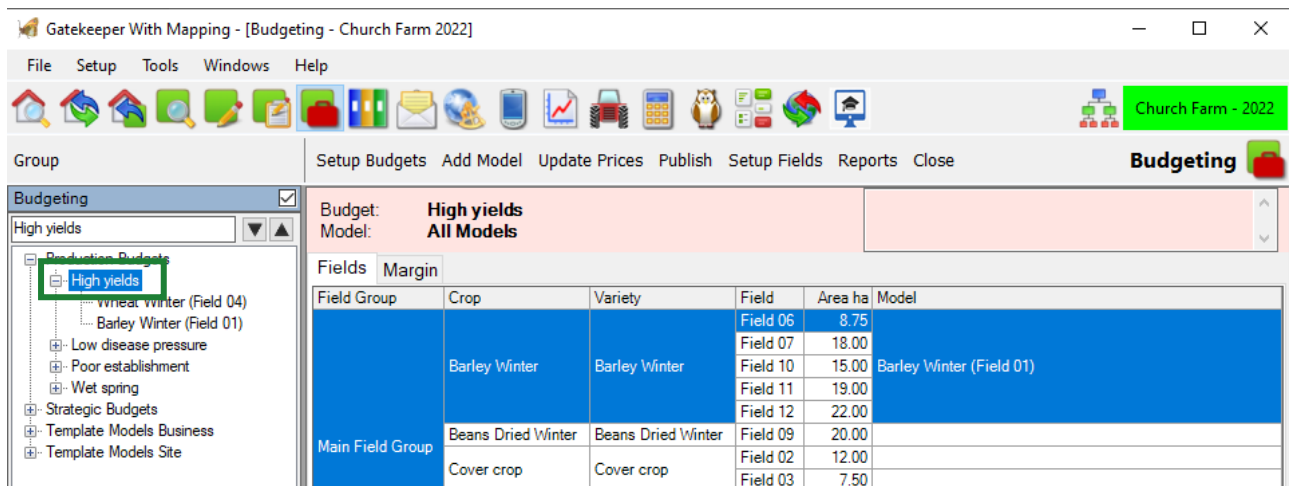
Once a template budget has been added, you will need to create a production budget that copies from the template budget to attach fields before you can report on the figures generated.

After a model has been built

Once a model has been built within a budget, the main budgeting screen populates with more information. From here, it is possible to view details of each model, or edit the model/budget as required.

If you select a budget from the tree view on the left hand side, you will be able to see an overview of the budget:

- 'Fields' tab shows all the fields set up in the cropping year, and the model they have been added to.
- 'Margin' tab will display the overall budget figures:



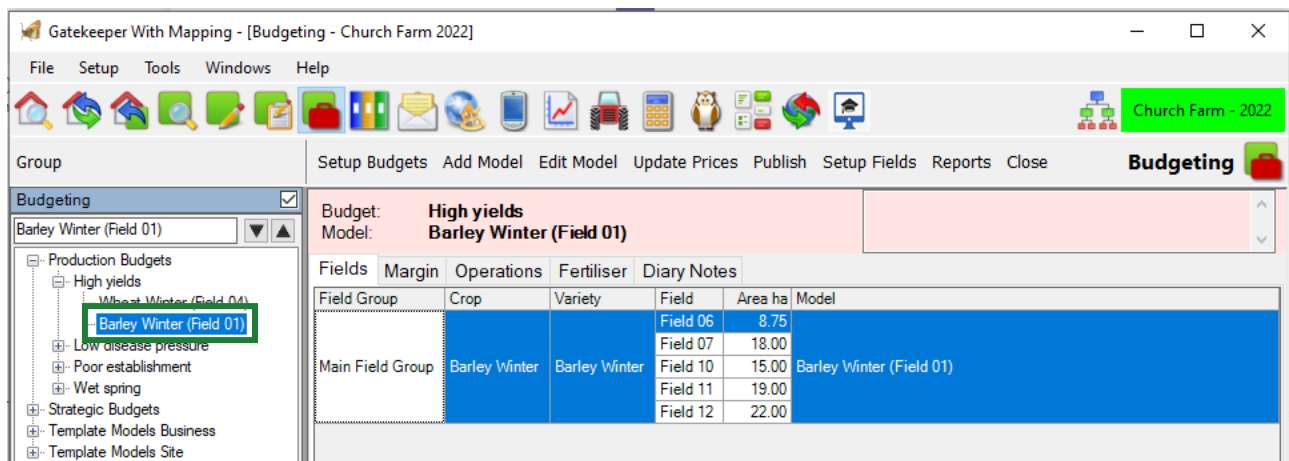
Field Group	Crop	Variety	Field	Area ha	Model
Main Field Group	Barley Winter	Barley Winter	Field 06	8.75	Barley Winter (Field 01)
			Field 07	18.00	
			Field 10	15.00	
			Field 11	19.00	
			Field 12	22.00	
Main Field Group	Beans Dried Winter	Beans Dried Winter	Field 09	20.00	
			Field 02	12.00	
			Field 03	7.50	
	Cover crop	Cover crop			

From this screen you can add extra models to the budget, update prices (see [Updating prices](#), p.12), or run budget reports (see [Reporting from budgets](#), p.17).

If you select a model from within a budget, more tabs and options are visible:

- The 'Fields' tab will now show just the fields associated with the selected model.
- 'Margin' tab shows the figures for this model only
- 'Operation' tab displays all the jobs within the model
- 'Fertiliser' tab shows nutrient totals for the model.

In addition, when a model is selected the button 'Edit Model' is also visible.



Field Group	Crop	Variety	Field	Area ha	Model
Main Field Group	Barley Winter	Barley Winter	Field 06	8.75	Barley Winter (Field 01)
			Field 07	18.00	
			Field 10	15.00	
			Field 12	22.00	

Moving fields

A field may only be in one model within a budget; if you try to add a field to a second model within a budget, it will be removed from the first.

To add or remove fields from a budget model:

1. Select the model that requires editing
2. Click 'Edit Model'
3. Select the 'Model' tab from the bottom of the page
4. Click 'Pick Fields'
5. Adjust fields as required, then 'OK' to save and close.

Editing models

To edit a model, select the model from the list on the left hand side, and then click 'Edit Model'

The screenshot shows the 'Gatekeeper With Mapping - [Budgeting - Church Farm 2022]' window. The 'Edit Model' button is highlighted in the menu. The main area displays the following table:

Field Group	Crop	Variety	Field	Area ha	Model
Main Field Group	Barley Winter	Barley Winter	Field 06	8.75	Barley Winter (Field 01)
			Field 07	18.00	
			Field 10	15.00	
			Field 11	19.00	
			Field 12	22.00	

Once the model has opened, you may wish to

- Add, edit, or delete jobs
- Adjust which fields are included in the model (see [Moving Fields](#), above)
- Edit job dates
- Adjust products, product amounts, or product prices
- Add or edit job payment dates, if cashflow reports will be required (see [Payment dates](#), p.14)

Updating prices

When products are added into models, the model will use their actual unit price. If no actual unit price exists, the estimated unit price will be used (if present). Existing product prices may be viewed by selecting *Setup > Products (Business)* from the main Gatekeeper screen.

Update an individual product price

Updating a product price within a model is possible, but care should be taken that the correct prices are entered. If the price is edited from the job tab, the cost displayed is per ha, not per unit

of product. It is possible to adjust the price per product unit, but this must be done from the products tab instead.

To update an individual product price in just one model, from the budgeting screen:

1. Select the model in question
2. Click 'Edit Model'
3. Select the job containing the product
4. Either:
 - a. Click on the job tab, and edit the 'Cost per ha'; or

Heading	Product	Units	Rate	Target		Product Comment
				Quantity	Cost per ha	
Fertiliser	N35	kg	180.000	14895.000	63.00	

- b. Click on the products tab, and edit the 'Target unit price' value

Target rate	<input type="text" value="180.000"/>	kg/ha
Target quantity	<input type="text" value="14895.000"/>	kg
Target unit price	<input type="text" value="0.350"/>	GBP/kg

5. Click 'OK' to save and close, or repeat as required.

Using the 'Update prices' functionality

The 'Update Prices' button allows the update of prices across a budget. Prices may be adjusted by a percentage change, or by entering specific unit prices as required. Prices will be updated across all models in a budget.

For both options described below, it is possible to filter by either job date or field group.

The screenshot shows the Farmplan software interface. At the top, there is a toolbar with various icons. Below the toolbar is a menu bar with the following options: Setup Budgets, Add Model, Update Prices (highlighted with a green box), Publish, Setup Fields, Reports, and Close. The main window is titled 'Budgeting' and shows a budget for 'High yields' and 'All Models'. On the left, there is a tree view showing the budget structure: Production Budgets, Optimistic, High yields (selected), Low disease pressure, Pessimistic, and Strategic Budgets. The main area displays a table with the following columns: Field Group, Crop, Variety, Field, Area ha, and Model. The table contains the following data:

Field Group	Crop	Variety	Field	Area ha	Model
			Field 06	8.75	
			Field 07	18.00	
	Barley Winter	Barley Winter	Field 10	15.00	Barley Winter (Fie

To make a percentage adjustment at the heading level, from the budgeting screen:

1. Select the model in question
2. Click 'Update Prices'
3. Select the 'Percentage Update' tab
4. Select the headings to update
5. Enter the percentage change (prefix negative adjustment with -)
6. Click 'Update Grid'

Update Prices

For budget: High yields
For year: 2022

Job Date
From:
To (inclusive):

Product target unit prices will be updated for all model jobs in this budget with job dates within the selected job date range and optionally filtered for any selected field groups

Field Group: **Percentage Update**

Update Target Unit Price by Heading Select all

- Adjuvants
- Establishment
- Fertiliser
- Fungicides
- Herbicides
- Organic Manure
- Seed / Plants

Percentage change:

Heading	Product	Units	Average Price	Target Unit Price	% Change	Update Price
Fertiliser	20-10-10	kg	(0.360 - 0.513) 0.436			<input type="checkbox"/>
Fertiliser	20-8-12+7	kg	(0.188 - 0.538) 0.363			<input type="checkbox"/>

To make a percentage adjustment by adjusting unit prices, from the budgeting screen:

1. Select the model in question
2. Click 'Update Prices'
3. Enter a unit price for each product to be adjusted
4. 'OK' to save and close, or 'Save' to save and continue

Update Prices

For budget: High yields
For year: 2022

Job Date
From:
To (inclusive):

Product target unit prices will be updated for all model jobs in this budget with job dates within the selected job date range and optionally filtered for any selected field groups

Field Groups: Percentage Update

Filter by field groups

Setup jobs for specific field groups or else split jobs by field group before using Custom Pricing if you wish to have different prices per field group

Heading	Product	Units	Average Price	Target Unit Price	% Change	Update Price
Fertiliser	20-10-10	kg	(0.360 - 0.513) 0.436	0.440	0.86	<input checked="" type="checkbox"/>
Fertiliser	20-8-12+7	kg	(0.188 - 0.538) 0.363	0.368	1.35	<input checked="" type="checkbox"/>

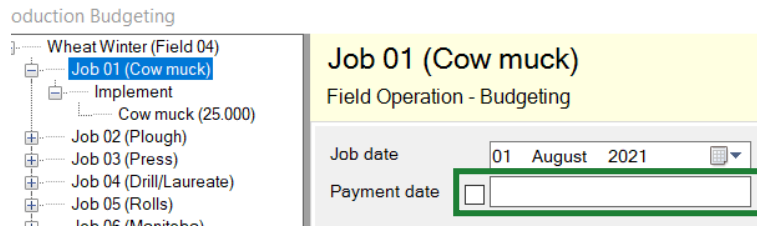
Payment dates

Each job in a model may be given a payment date, in addition to the job date. Payment dates should be entered if the budget will be used to create any cash-flow type reports, and may either be entered individually, or calculated across a model based on the job date.

When payment dates are calculated from job date, the user can enter a required number of days between the job date and the payment date (e.g., 30 or 60 days, etc). All jobs in the model will then be given a payment date the specified number of days after their job dates.

To manually enter job payment dates, from the budgeting screen:

1. Select the model in question
2. Click 'Edit model'
3. Select the first job to edit
4. Put a tick in the selector box next to payment date, and enter or select a date as preferred:



5. Continue through other jobs, remembering to save regularly.

To automatically calculate job payment dates, from the budgeting screen:

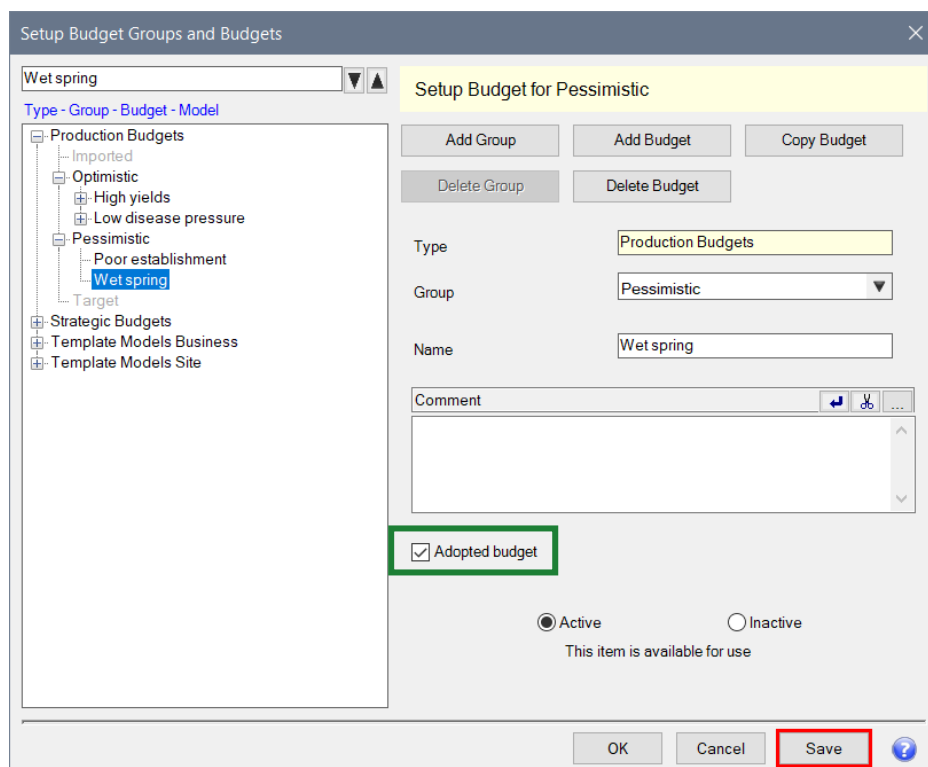
1. Select the model in question
2. Click 'Edit model'
3. Select the first job to edit
4. Adjust the 'Days from job to payment date' as required
5. Click 'Update all payment dates'
6. Accept the warning message
7. Click 'OK' to save and close.

Adopting a budget

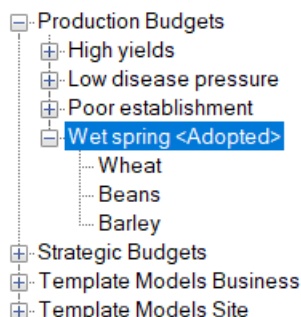
Adopting a production budget makes it the default budget for reporting purposes in the analysis module.

To adopt a budget, from the main budgeting screen:

1. Click 'Setup Budgets'
2. Select the required budget from the list on the left hand side
3. Tick 'Adopted Budget'
4. 'OK' to save and close



Once adopted, the budget name will have <Adopted> appended:



Publishing budgets

Budgets may be published between any sites which have the budgeting module active. For example, an agronomist may create a budget with a series of models in and publish this to their grower – or vice versa.

Please note: To publish a budget to another site, you will need to have their publishing key. For assistance on this, please click [here](#).

To publish a budget, from the main budgeting screen:

1. Select the budget from the list on the left hand side
2. Click 'Publish'

Field Group	Crop	Variety	Field	Area ha	Model
Main Field Group	Barley Winter	Barley Winter	Field 06	8.75	Barley
			Field 07	18.00	
			Field 10	15.00	
			Field 11	19.00	
			Field 12	22.00	
	Beans Dried Winter	Beans Dried Winter	Field 09	20.00	Beans

3. Select the required contact(s)
4. *Optional:* the tick box 'Include cropping or enterprise links with published budget models' means that any fields or enterprises included in the models that have been created will be sent to the recipient. If this box is not ticked, the recipient will receive budgets and models, but with no fields or enterprises associated to them.
5. Click 'OK'

The publication is now created, and will be sent next time Gatekeeper is synchronised.

Reporting from budgets

Budget reports may be run from either the budgeting or analysis modules. While the budgeting module has a few pre-defined reports available, the analysis module gives more reporting templates and greater flexibility.

Production budgets may be compared to other production budgets, or to actual field data from the same cropping year, while strategic budgets may only be compared with other strategic budgets.

Any reports relating to the budgeting module are compiled from the analysis tables. This means that regardless of whether a report is run from the budgeting module itself, or the analysis module, the analysis database must be refreshed after any data is added or updated.

Budget module reports

To run a report from the budgeting module main screen:

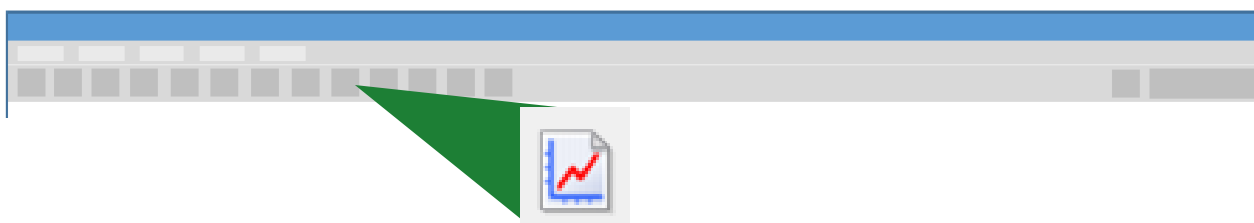
1. Select the required budget from the list on the left hand side
2. Click 'Reports'
3. If any budget data has been changed:
 - a. Click 'Refresh Analysis Data'
 - b. Select the year(s) that have been edited
 - c. Click 'Refresh Data'
 - d. When the refresh has completed, click 'Close'
4. Select the required report from the list on the left hand side
5. Adjust any tick box options as required
6. Click 'Run Report'

The report can be saved, printed, or published as usual.

Analysis module

There are a greater amount of report templates available through the analysis module. Analysis module reports also have greater capacity for editing and personalisation.

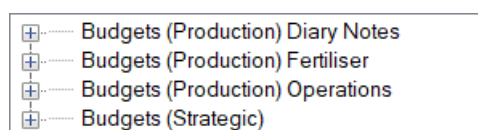
The analysis module is accessed from the main Gatekeeper screen with the icon shown below:



To run a report from the analysis module main screen:

1. If any budget or field data has been changed:
 - a. Click 'Refresh'

- b. Select the year(s) to refresh
 - c. Click 'Refresh Data'
 - d. When the refresh has completed, click 'Close'
2. Select the required report from the list on the left hand side, where there will be a number of 'Budgets' specific report groups

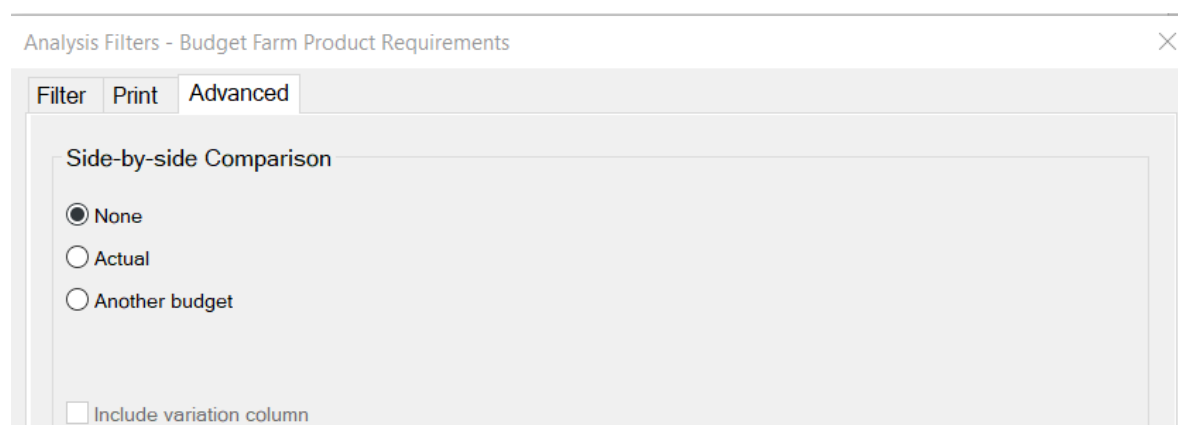


3. In the 'Filters' window that opens, select which information should display in the report. If the 'OK' button is greyed out, one or more parameters need to be selected before the report can be run.
4. Click 'OK'
5. The results of the report can be seen in the analysis window and may now be printed, saved, or published as usual. It is also possible to compare a second set of data using the same report.

Advanced reporting options

When the budgeting module is activated, a third tab is added to the filters screen of the analysis module. The 'Advanced' tab contains addition report filters which only apply to budget module specific reports.

The 'Side by Side Comparison' section contains the options available for comparing a second data set against the selected budget:



Where 'Actual' is selected, the report will show the selected budget against actual figures of the current cropping year. You will be given the option to select which field jobs should be included into the actual figures based on status.

Where 'Another budget' is selected, the report will show the selected budget against a second selected budget. If using this option, ensure there is only one budget selected on the 'Filter' tab of the screen.

There is also a tick box option 'Include variation column'. When this option is used, an additional column showing the variation between selected budget and the comparison source will be displayed.

The 'Time Line' section controls the increments into which the report results are split. Once an increment has been selected, you will be prompted to select the start and end dates of the report. Once dates have been selected, the 'Time Increments' section will automatically calculate how many columns the report will include, based on your selected time increments and from/to dates. The maximum number of columns for a report is 100, so if your selection results in more than 100 column, you will need to change either your increment or the from/to date range.

If a time increment is selected, there is also the option under 'Budget Date to Use' to select whether it is job dates or payment dates that should inform the report.

For more information on editing analysis reports, or the greater flexibility available in editing and bespoke reports, please refer to the separate analysis module handbook.

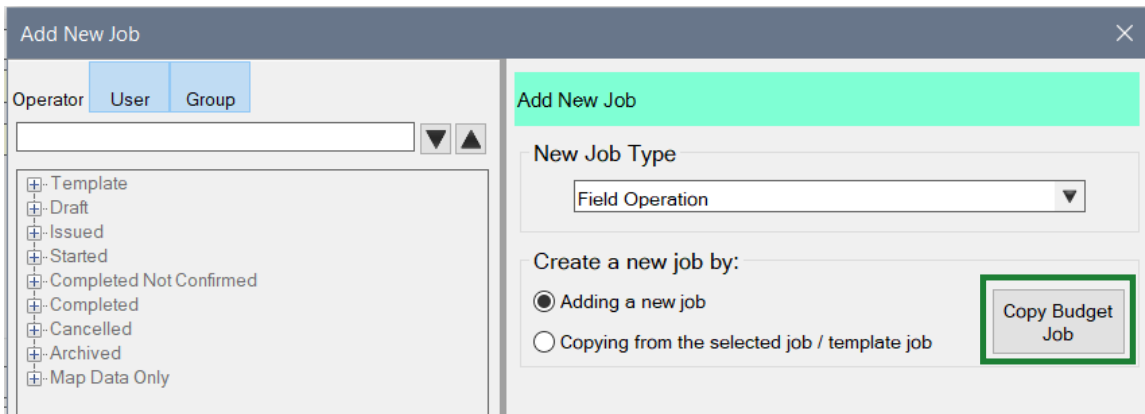
Using budgets in other modules

Creating field jobs based on budgets

Once a budget has been created, it can be used through the cropping year to quickly and easily create planning or recording jobs.

To copy a job from a budget:

1. Start adding a job as usual, in either planning or recording
2. In the 'Add New Job' screen, click 'Copy Budget Job'



3. Select the budget and job to be copied from the list on the left hand side
4. Click 'Copy Field Operation Job'
5. Select the required field(s), and continue creating job as usual.

Budgets and nutrient management planning

When the budgeting module is present in Gatekeeper, users may opt for their applied data figures to be sourced from their adopted budget rather than field records at the point of creation or update.

To use the adopted budget as your preferred source of applied data, select 'Adopted budget' on the 'Nutrient Management Plan Update' screen:

