



How to duplicate a budget

Duplicating a Budget

1. Follow the path [Settings > Budgets](#)

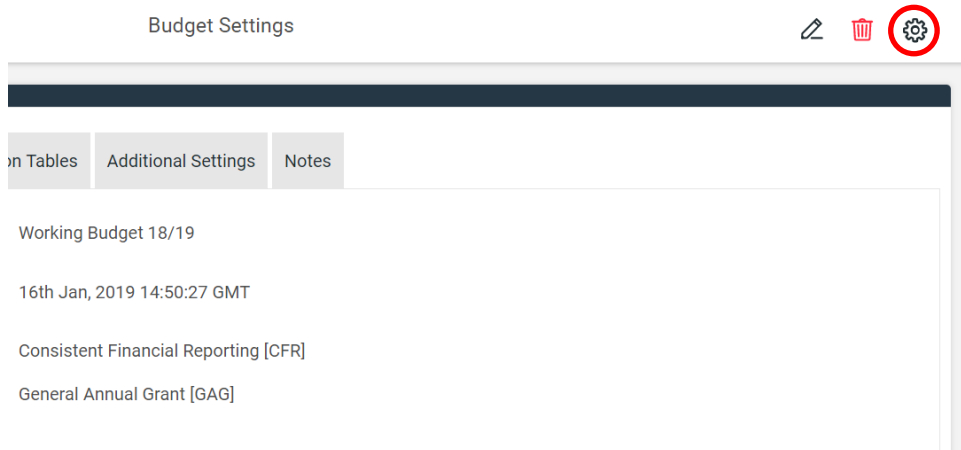


2. Select your current working budgets name in blue

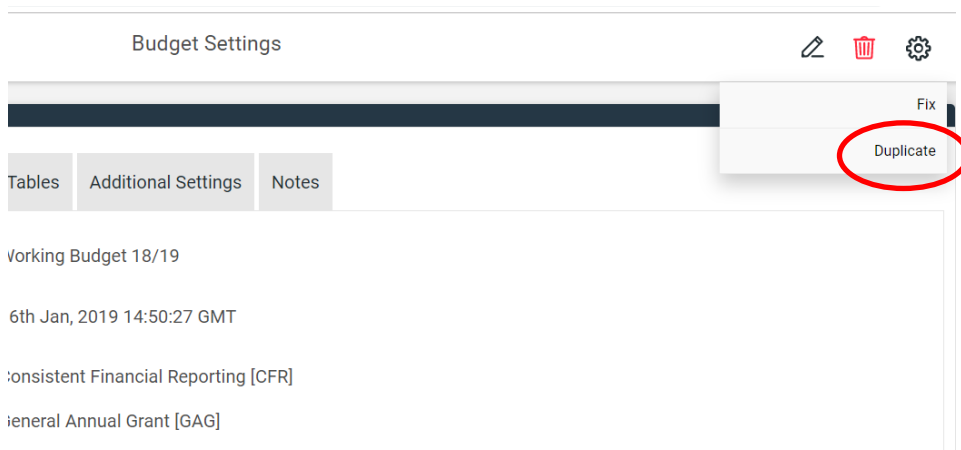
Search: Budgets ?

Actions	Filters	Hidden	Name	Start	End	Reporting
PDF	Print	XLS	Working Budget 18/19	1st September, 2018	31st August, 2023	CFR, GAG
			Scenario 1 18/19	1st September, 2018	31st August, 2023	CFR, GAG
			Initial budget 2018/19	1st September, 2018	31st August, 2023	CFR, GAG

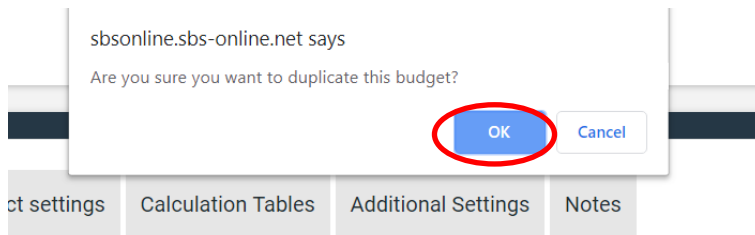
3. Select the actions cog in the top right



4. Select the option to 'duplicate'



5. This will prompt a confirmation message, select 'OK'



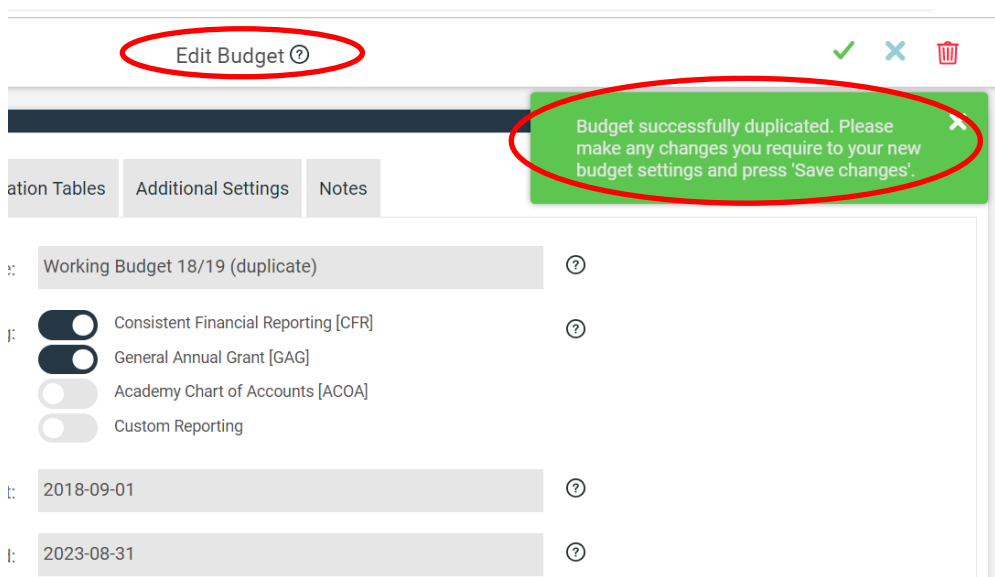
Name: Working Budget 18/19

Created on: 16th Jan, 2019 14:50:27 GMT

Reporting: Consistent Financial Reporting [CFR]

General Annual Grant [GAG]

6. This lead you to the edit page of your new budget and a confirmation message will appear



- Manually make any necessary amendments, e.g. rolling the budget forward a year and updating the Budget name

Edit Budget ?

Calculation Tables
Additional Settings
Notes

Name: Working Budget 19/20 ?

Reporting:

☒ Consistent Financial Reporting [CFR] ?

☒ General Annual Grant [GAG] ?

☐ Academy Chart of Accounts [ACOA]

☐ Custom Reporting

Start: 2019-09-01 ?

End: 2024-08-31 ?

- Use the save icon in the top right (the green tick) once you have made you amendments

Edit Budget ?

on Tables
Additional Settings
Notes

Working Budget 19/20 ?

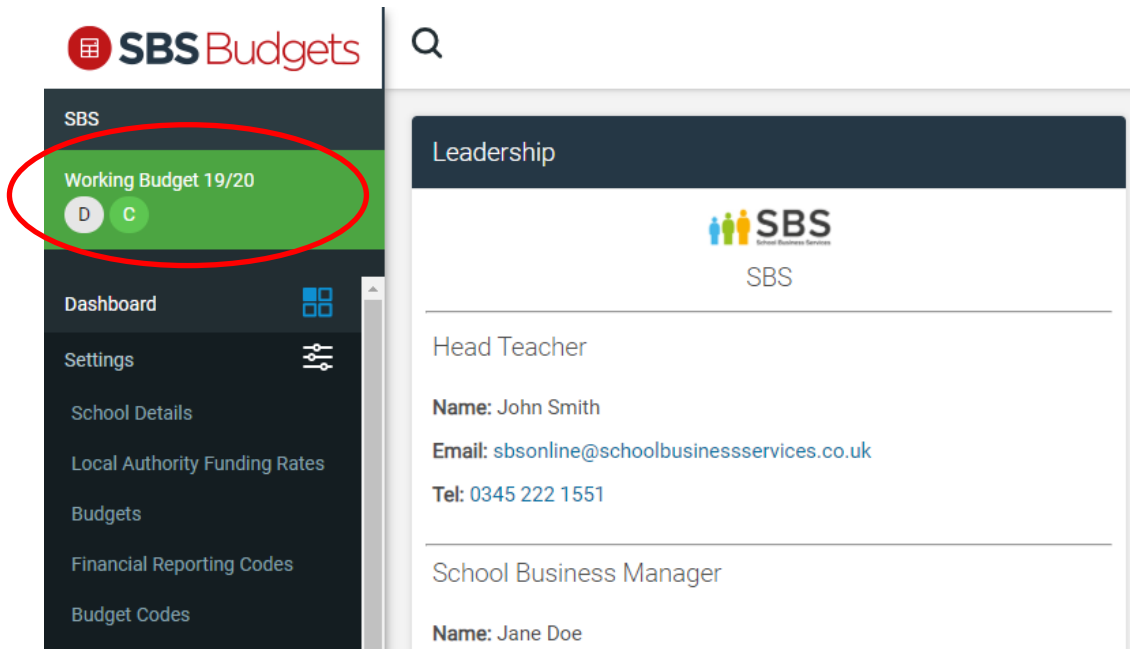
☒ Consistent Financial Reporting [CFR] ?

☒ General Annual Grant [GAG] ?

☐ Academy Chart of Accounts [ACOA]

☐ Custom Reporting

9. Set your new budget as your current and continue working



The screenshot shows the SBS Budgets web application. On the left is a dark sidebar with the SBS Budgets logo at the top. Below the logo, the text 'SBS' is displayed. A green bar highlights the 'Working Budget 19/20' option, which contains two circular buttons labeled 'D' and 'C'. Below this bar are several menu items: 'Dashboard', 'Settings', 'School Details', 'Local Authority Funding Rates', 'Budgets', 'Financial Reporting Codes', and 'Budget Codes'. The main content area on the right has a dark header with the text 'Leadership'. Below the header is the SBS logo and the text 'SBS'. The main content area is divided into two sections. The first section is titled 'Head Teacher' and contains the following information: 'Name: John Smith', 'Email: sbsonline@schoolbusinessservices.co.uk', and 'Tel: 0345 222 1551'. The second section is titled 'School Business Manager' and contains the following information: 'Name: Jane Doe'.