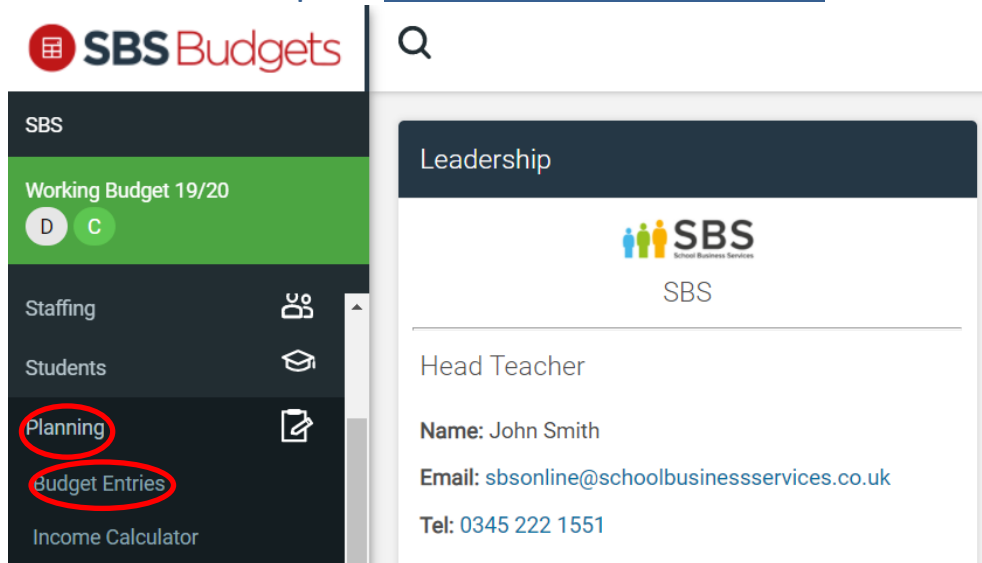






How to create a Budget entry

Creating Budget Entries

1. Follow the path [Planning > Budget Entries](#)



2. Select the create sign in the top right (pen with a plus)

Budget Entries ?  

71 items : 1 pages

on	Tags	Fund Codes	2019/20	2020/21	2021/22	2022/23	2023/24	Notes	Actions
F									edit
			2,040.00	2,080.80	2,122.42	2,164.86	2,164.86		edit
ates			70,615.13	74,145.88	74,145.88	74,145.88	74,145.88		edit

3. This will give you the option of Brought Forward, Income or Expenditure

Budget Entries ⓘ

Brought Forward
Income
Expenditure

Tags	Fund Codes	2019/20	2020/21	2021/22	2022/23	2023/24	Notes	Actions
								edit
		2,040.00	2,080.80	2,122.42	2,164.86	2,164.86		edit
tes		70,615.13	74,145.88	74,145.88	74,145.88	74,145.88		edit

4. Give the Budget Entry a name (description)

Create Budget Entry ⓘ

Entry details Profile Notes

Description:

Budget code:

Cost centre:

Tags:

Fund codes:

5. Select the relevant Budget Code from the drop down

Create Budget Entry ?

try details Profile Notes

Description:

Budget code:

Cost centre:

Tags:

Fund codes:

Only Budget Codes that are relevant to the type of Budget Entry selected will be displayed.

6. Select a Cost Centre from the drop down options, if relevant

Create Budget Entry ?

Description:

Budget code:

Cost centre:

Tags:

Fund codes:

7. Complete the Analysis Tags/Fund Codes if relevant

Create Budget Entry ?

Description: ?

Budget code: ACA3125 - Electricity ▼ ?

Cost centre: ▼

Tags: Add Tags... ▼ ?

Fund codes: Add Fund codes... ▼

8. Select the 'Profile' tab

Create Budget Entry ?

Entry details **Profile** Notes

Description:

Budget code: ACA3125 - Electricity

Cost centre:

Tags: Add Tags...

Fund codes: Add Fund codes...

9. Enter the value of the Budget Entry

Create Budget Entry ? ✓

Entry details
Profile
Notes

Amounts by date

Inflation
0%
Apply
Profile

2019/20:	0.00
2019-09-01	
0.00	
2020/21:	0.00

10. You can then cascade the value to future years

Create Budget Entry ?

Entry details
Profile
Notes

Amounts by date

2019/20:	
2019-09-01	
Cascade Change	
1000	
2020/21:	
2020-09-01	

11. You can also apply inflation to future years

Create Budget Entry ? ✓ ✓+ ✕

Inflation

1

Apply

Profile

1,000.00

12. There is also the ability to Profile Budget Entries

Create Budget Entry ? ✓ ✓+ ✕

Inflation

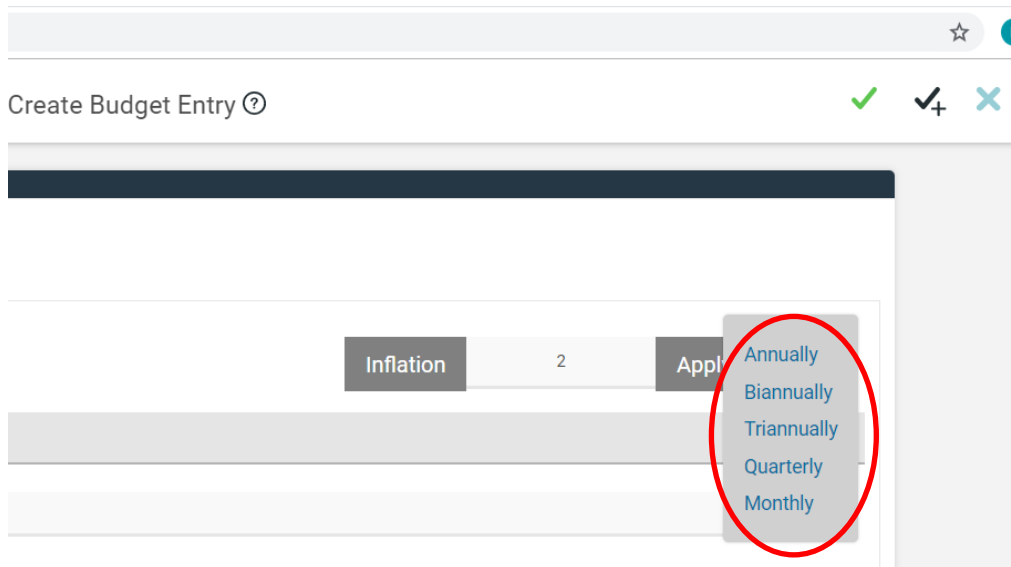
1

Apply

Profile

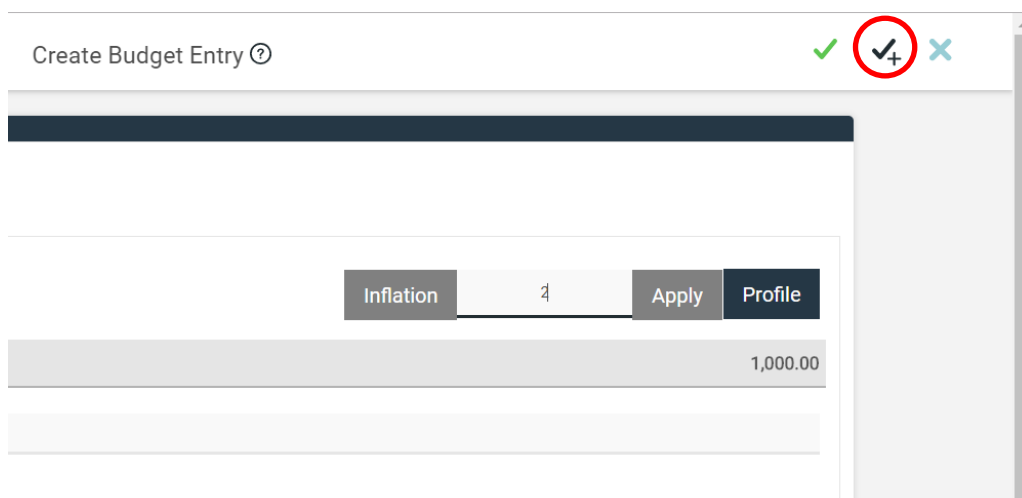
1,000.00

13. Select how you would like the entry to be profiled



The screenshot shows the 'Create Budget Entry' form. The 'Inflation' field is set to '2'. The 'Apply' button is visible. The 'Profile' dropdown menu is open, showing options: 'Annually', 'Biannually', 'Triannually', 'Quarterly', and 'Monthly'. The 'Annually' option is highlighted with a red circle.




14. Once all the data is in the entry, select the save and new icon if you have more of the same type of Budget Entries to create



The screenshot shows the 'Create Budget Entry' form. The 'Inflation' field is set to '2'. The 'Apply' button is visible. The 'Profile' dropdown menu is open, showing options: 'Annually', 'Biannually', 'Triannually', 'Quarterly', and 'Monthly'. The 'Annually' option is highlighted with a red circle. The 'Save and New' icon (a checkmark with a plus sign) is also highlighted with a red circle.

15. If this is the last Entry to be created, select the save icon (the green tick)

Create Budget Entry ?

Inflation
4
Apply
Profile

1,000.00