


Cloning Budgets to the Next Financial Year

Budgets can be cloned from the current year, as displayed in the Budget Year drop down menu to the next.

This saves having to re-enter all the budgets at the end of the financial year, when the new budgets are set up for the next one.



From the Budget List Screen select the  menu choice.

The following screen is displayed:

[illegible]

To clone selected budgets and sub budgets, simply check the boxes as needed.

To clone all of your budgets, check **'Select All'**

Once you have the selected the budgets you require you can now enter the amount you would like to allocate each budget. In the right hand column, enter the funds for each budget. These will then be populated into the newly cloned budgets for next budget year.

Once you have confirmed the budgets you would like to clone, click '**Accept**' to then clone any selected budgets to the new financial year.

The cloned main and sub budgets will be blank in the new financial year if you have not allocated funds to them. You will need to enter the allocated funds to these budgets.

Additional new budgets can also be created after this process has been completed. Select the financial year from the dropdown menu then press **add**. Enter all budget information as required and ensure the financial year is chosen again from the internal menu of that new budget record. Press save to confirm the new budget to the selected financial year.