

Budgets Page: Module Settings Tab

The Module Settings Tab allows an individual to customize settings for archived budgets and settings for budget deletion.

Budgets Add New Budget

Active Closed Archived Reports Settings

Settings

Archive Budgets

- Archive budgets when associated user account is archived.

Note: Un-archiving a user will cause associated auto-archived budgets to return to their previous state (Active or Closed). Budgets that were manually archived before the user was archived will remain Archived.

Delete Budgets

- Delete budgets when associated user account is deleted
- Only delete "empty" budgets with no recorded budget items

Save Cancel

Budgets will automatically be archived when the user account associated with the active budget is archived. Un-archiving a user will result in the automatically archived budgets to return to their previous state (active or closed). If the budget was manually archived before the user was archived, the budget will remain archived. You can deselect the “Archive budgets when associated user account is archived” checkbox if you do not want budgets to be archived when associated user accounts are archived.

Selecting the “Delete budgets when associated user account is deleted” checkbox will result in budgets being automatically deleted when the associated user account is deleted. When this budget setting is selected, an additional checkbox becomes available. If the “Only delete “empty” budgets with no recorded budget items” checkbox is selected, a budget will not be deleted if there are budget items recorded within the budget.

Changes must be saved by clicking the “Save” button in order for the settings modifications to be recorded by the system.

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