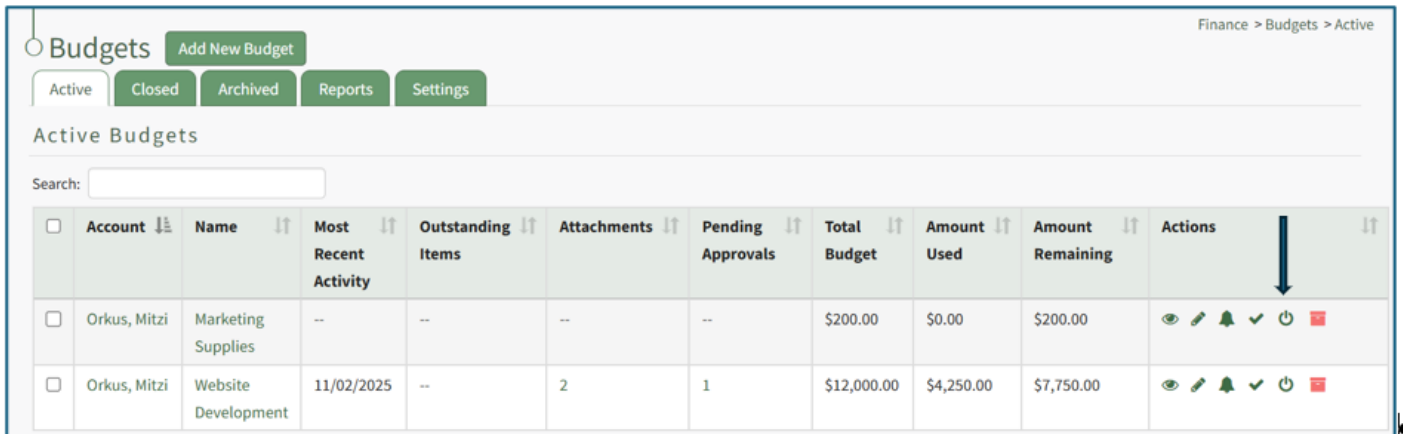


Close a Budget

Only active budgets can be closed. To close an active budget, go to the Active Tab of the Budgets Page in the Finance Module. Click the power icon in the Actions column of the Active Table.



Finance > Budgets > Active

Budgets Add New Budget

Active Closed Archived Reports Settings

Active Budgets

Search:

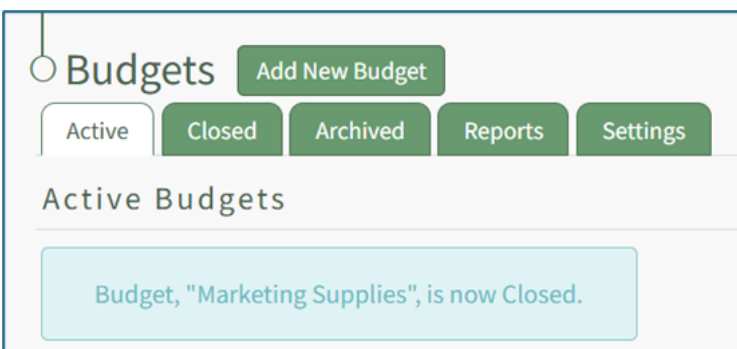
<input type="checkbox"/>	Account	Name	Most Recent Activity	Outstanding Items	Attachments	Pending Approvals	Total Budget	Amount Used	Amount Remaining	Actions
<input type="checkbox"/>	Orkus, Mitzi	Marketing Supplies	--	--	--	--	\$200.00	\$0.00	\$200.00	
<input type="checkbox"/>	Orkus, Mitzi	Website Development	11/02/2025	--	2	1	\$12,000.00	\$4,250.00	\$7,750.00	

This will open a confirmation modal stating, “Are you sure you want to close this budget? Alerts will no longer be sent.” Select the “OK” button.

sam.kastrack.com says

Are you sure you want to close this budget? Alerts will no longer be sent.

The budget will no longer show on the Active Tab of the Budgets Page, which will display a message stating the budget is now closed.



The closed budget will now show on the Closed Tab of the Budgets Page.

Budgets Add New Budget

- Active
- Closed
- Archived
- Reports
- Settings

[Closed] Budgets

Search:

<input type="checkbox"/>	Account ↓	Name ↑	Most Recent Activity ↑	Outstanding Items ↑	Attachments ↑	Pending Approvals ↑	Total Budget ↑	Amount Used ↑	Amount Remaining ↑	Actions ↑
<input type="checkbox"/>	Orkus, Mitzi	Marketing Supplies	--	--	--	--	\$200.00	\$0.00	\$200.00	  

Revision #1

Created 2025-12-05 22:00:35 UTC by Mitzi Orkus

Updated 2025-12-05 22:03:23 UTC by Mitzi Orkus