

Edit a Budget

Only active budgets can be edited. To edit a budget, go to the Active Tab of the Budgets Page in the Finance Module. Click the pencil icon in the Actions column of the Active Table.












Finance > Budgets > Active

Budgets Add New Budget

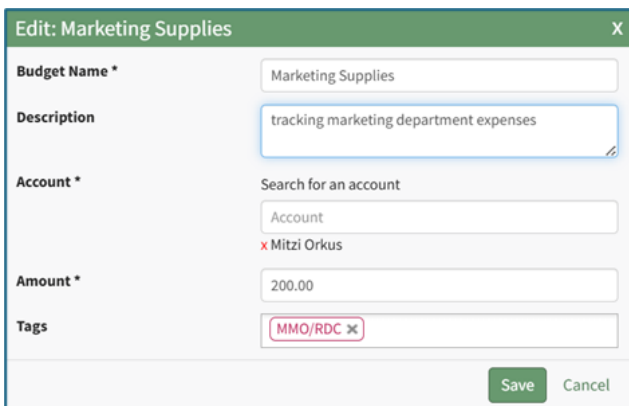
Active Closed Archived Reports Settings

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 opens the Edit (BUDGET NAME) Modal.



Edit: Marketing Supplies X

Budget Name *

Description

Account * Search for an account

x Mitzi Orkus

Amount *

Tags

Save Cancel

Make any desired changes to the Budget Name, Description, Account, Amount, or Tags associated with the budget.

When done making changes, click the "Save" button and return to the Active Tab of the Budgets Page.

Revision #2

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