

Overview

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There are different approaches and ways to do budgeting within SGA, with several options listed below for consideration.

- Enter an annual budget amount in selected accounts by keying the annual amount in the first month. The menu option [global budget changes](#) allows you later to spread the annual amount to all months of the fiscal year.
- Create the budget for selected groups of accounts by running one of the global budget calculations to create a beginning budget based on a calculation from past years.
- Do nothing, which gives you a blank slate to begin a new budget.
- Set the budget formats so on the actuals/budget screen for each account the user is prompted to have the budget (or forecast) copied from the prior year as a starting point. If components exist, it will also copy the component details. This allows the user a time savings by seeing last year's details on each account and making changes as needed for the new year.
- From the [actuals/budgets](#) screen enter the monthly amounts, which also gives the user the option to calculate budgets based on various formulas. There are many budget tools on this screen that you can make good use of. Compare different formulas using the worksheet, a summary, graphs, and browsing [transactions](#). This screen displays actuals, budgets, forecasts, and variances. Then, if you wish, break down the details for each month by using [components](#).
- From the actuals/budget screen, go directly to components to enter the budget details for each month. The monthly amounts are auto-updated upon save.
- At any point, you can see the budgeted amounts in a financial statement, which can be displayed, printed, or exported to Excel.

Other Budgeting Tools

- You can create as many budget columns or scenarios as you need using [budget types](#) and [budget years](#).

See [Budget Setup for New Year](#).
