Amend and Maintain Forecast Section/Category (W5)

This version is superseded. Click here to view the latest guide.

PURPOSE

This is the detailed procedure for how to amend and maintain forecast section/category.

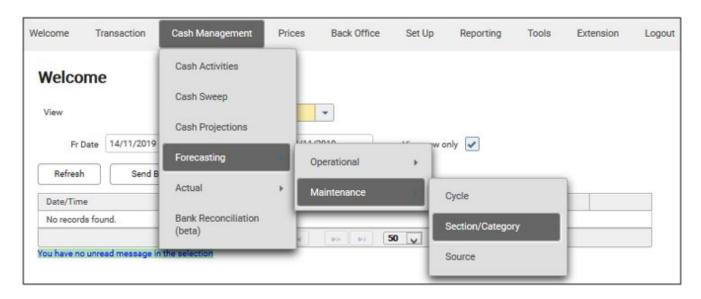
WHY IS THIS IMPORTANT?

Amending and maintaining forecast section/category is important to ensure that a user has the flexibility to change the forecast section/category once it is set up.

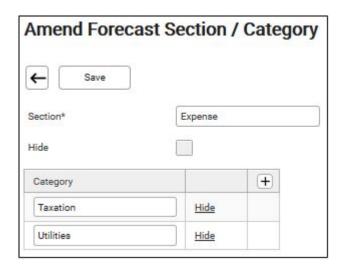
PROCEDURE



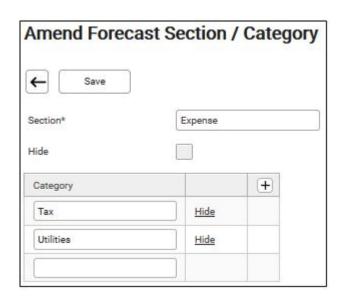
 $1. \ Select \ Cash \ Management > Forecasting > Maintenance > Section/Category.$



- 2. In the next screen, choose the section name to amend by clicking on the section name. In this example, we will amend Expense.
- 3. The Amend screen will show the categories under the Expense section.

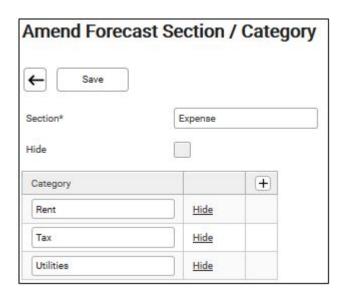


- 4. To change the category, type the new category name on the preferred field. For example, we will change Taxation to Tax.
- 5. Click Save.
- 6. A new category may also be added. To add a new category, from the Amend Forecast Section/Category screen, click on Add Button.
- 7. A blank field appears.



8. Type the category name to add. In this example, the name would be Rent. Click Save.

9. Category: Rent would be added once the Save button is clicked.



FREQUENTLY ASKED QUESTIONS

RELATED INFORMATION

Viewing and Creating Forecast Section/Category

Maintaining Forecast Details

Maintaining Forecast Grouping

CHANGE HISTORY

Date	Ву	Changes
15-Feb-2008	*	Created
8-Jan-2015	Clarissa	Reformatted. Rewritten.
7-Jun-2016	Douglas	Proofread.
21-Nov-2019	Lyra	Updated Screenshots.