

# Amend and Maintain Forecast Section/Category

[See previous W5 version guide](#)

## **PURPOSE**

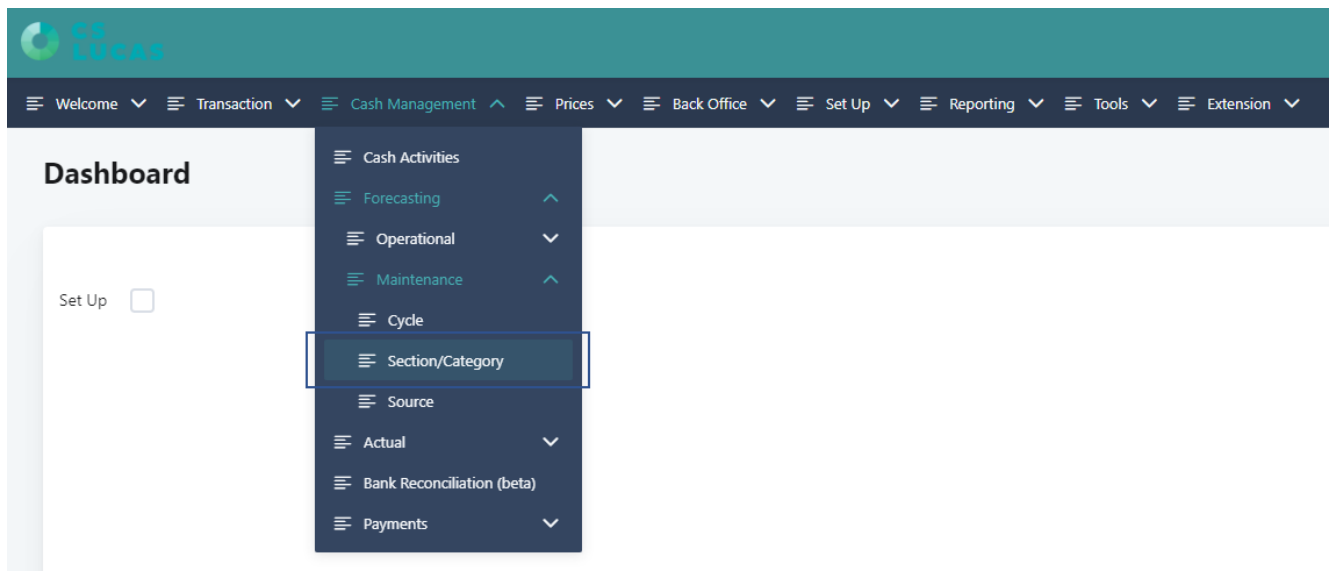
This is the detailed procedure for how to amend and maintain forecast section/category.

## **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. This will launch the Forecast Section / Category Maintenance page. Choose the section name to amend by clicking on the Edit button. In this example, we will amend Operating Activities.

3. The Amend screen will show the categories under the Revenue section.

## Amend Forecast Section / Category

✕ Cancel

💾 Save

Section\*

Operating Activities

Hide

☐

Category

+

Fixed Business Expenses

[Hide](#)

Taxes

[Hide](#)

4. To change the category, type the new category name on the preferred field. For example, we will change Taxes to Taxation.

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.

## Amend Forecast Section / Category

✕ Cancel

💾 Save

Section\*

Operating Activities

Hide

☐

Category

+

Fixed Business Expenses

Hide

Taxation

Hide

8. Type the category name to add. In this example, we will add Rent. Click Save.

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

## Amend Forecast Section / Category

✕ Cancel

💾 Save

Section\*

Operating Activities

Hide

☐

Category



Fixed Business Expenses

Hide

Taxation

Hide

Rent

### FREQUENTLY ASKED QUESTIONS

### RELATED INFORMATION

[Viewing and Creating Forecast Section/Category](#)

[Maintaining Forecast Details](#)

[Maintaining Forecast Grouping](#)

### CHANGE HISTORY

| Date        | By       | Changes                                     |
|-------------|----------|---|
| 15-Feb-2008 | -        | Created.                                    |
| 8-Jan-2015  | Clarissa | Rewritten. Reformatted.                     |
| 7-Jun-2016  | Douglas  | Proofread.                                  |
| 21-Nov-2019 | Lyra     | Updated screenshots.                        |
| 1-Jun-2023  | TS       | Updated to W6 instructions and screenshots. |