How many budgets can I have defined?

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Applies to

- WorldShare Acquisitions

Answer

Your library may have two budgets open at one time. It is possible to use a new budget before you close the previous budget. For example, you may want to start ordering on the new budget a few weeks before the end of the previous fiscal period, or you may keep the previous budget open for several weeks after the end of its fiscal period and use the new budget for all new orders.

If you already have two budgets open, and need to use a new one you must close one budget in order to use the new budget.

When you are ready to start using the new budget:

1. On the left panel, click Budgets.
2. In the Select Budget list, select the budget you want to edit. The highlighted budget is the current budget in use.
3. Click Edit.
4. Select the Enable for use check box, at the top of the page.
5. On the Change bookable status of Budget Period window, click OK.
6. Once you have enabled a budget for use, it will appear as the second budget in the budget drop-down for the order item and invoice item.

Additional information

- See the recorded training session on Creating a Budget
- See more information on Create a budget for the next fiscal period
- See more information on Closing a budget

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