Compare Budget to Forecast in Financial Layout

Description

* How to use the Financial Designer module to add a budget or forecast column to a report and using a variance column to compare the difference.

Resolution

1. Click **Maintenance, Companies**
2. Select *Company*
3. Click **Maintenance, Financial Designer, Layout**
4. Select report from dropdown list
5. Click **Edit**
6. From the **Mode** dropdown, select **Column Attributes**

**Note: If you do not have a budget column select and insert the budget column first next to the column you wish. Then select the forecast column and insert it. You can insert a PTD or YTD versions if you wish.**

1. Select **Period to Date** section or **Year to Date** section
2. Click **PTD Forecast or YTP Forecast**
3. Select the **column** you want to have this new column to be inserted next to
4. Click **>** button to insert the new column
5. Click **Save**
6. Click **Edit**
7. Select **Special** section
8. Click **Variance**
9. Click **>** button to insert the new column next to the forecast column
10. Select **Column Header** and name report
11. Select Calculation to use **PTD Budget** column and **PTD Forecast** column.

**Note: Click Check-box if you want to Reverse Calculation for Expense Accounts.**

1. Click **Ok**
2. Click **Save**