Revenue budgets

Overview

A revenue budget has a **Name**, a **Description**, a **Long Name** and an **Organization**. Each revenue budget has budget details per fiscal year. Each budget detail has a budget amount and an **Active** flag.

The **Revenue Budgets** screen is the Accounts Receivable screen that lists revenue budgets and their budget details by fiscal year. You see and change revenue budgets for your own county only.

Use this page to:

- Review revenue budgets and their budget details, including inactive details.
- Add or edit a revenue budget.
- Copy revenue budgets from one fiscal year into another.
- Set every revenue budget detail of a fiscal year to Active or Inactive at once.

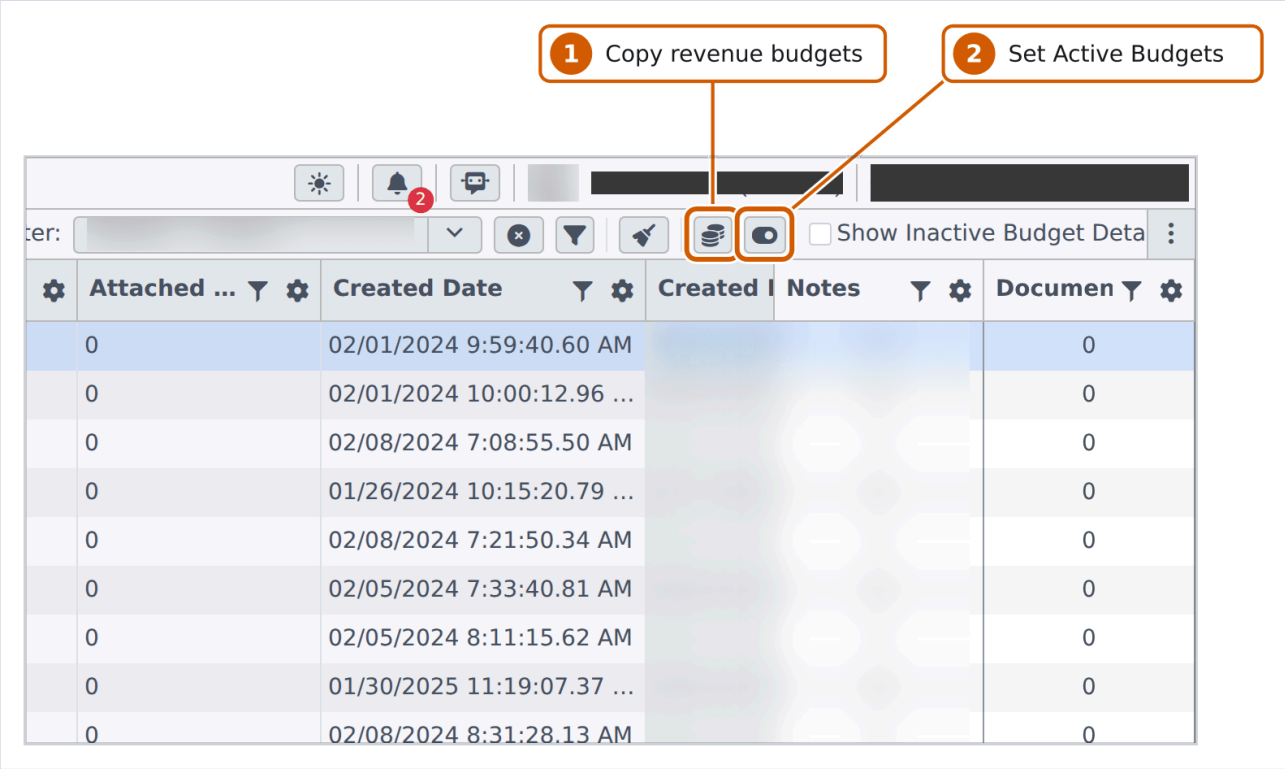
Before you begin

- Sign in to IRIS10.
- Make sure you have access to the **Revenue Budgets** screen in Accounts Receivable.
- Set up fiscal years and organizations. See Units of measure, fiscal years and organizations.
- Know how to use the shared data grid. See Data grid overview and basics.

Procedure

View revenue budgets and show inactive budget details

1. Open the **Revenue Budgets** screen in the Accounts Receivable portal. The **Revenue Budgets** grid opens, with a child grid of budget details for each budget.



The Revenue Budgets screen and its toolbar

1. Copy revenue budgets
2. Set Active Budgets

2. Open a budget's details in the child grid. The budget's details show the fiscal year, the budget amount and the **Active** flag.
3. To include inactive details, select the **Show Inactive Budget Details** checkbox on the toolbar. The setting is saved and the grid reloads. If the change fails, the checkbox goes back to its previous value.

> **Note:** As an alternative to the checkbox, choose **Options** > **Show Inactive Budget Details**. IRIS10 keeps the setting only for your current sign-in session. The setting lasts only until you sign out.

Add or edit a revenue budget

1. In the **Revenue Budgets** grid, use the add tool to add a budget. The **Revenue Budgets** editor opens.

> **Note:** To edit an existing budget, open it with the inline buttons or the pop-out editor instead. The editor opens the same way.

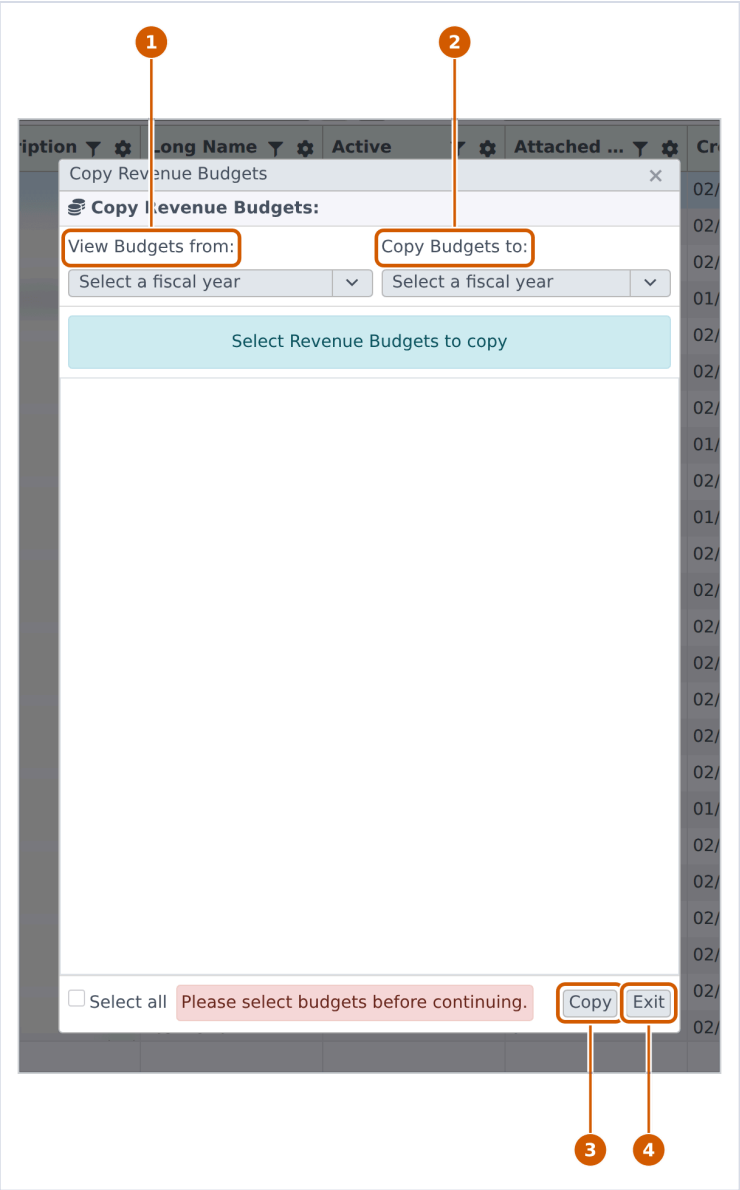
2. Choose the **Organization** from the drop-down.
3. Enter a **Name** of up to 30 characters. If you leave **Name** blank, IRIS10 shows a message that the field is required.
4. Optionally, enter a **Description** and a **Long Name** (up to 50 characters each).

5. Leave **Active** selected for a budget that is in use. Clear it to archive the budget. New budgets are Active by default.
6. Save the record. For saving grid records, see Grid viewing and editing.

Copy revenue budgets to another fiscal year

1. Click the toolbar button whose tooltip is "Click to copy revenue budgets." The **Copy Revenue Budgets** window opens with the header "Copy Revenue Budgets:" and the banner "Select Revenue Budgets to copy". If no fiscal years have budgets, IRIS10 shows "There are no budgets with associated fiscal years to copy." and closes the window.

> **Note:** You can also choose **Options** > **Copy Revenue Budgets**. You see this option only if your access level allows it. If it is missing, ask your administrator.



The Copy Revenue Budgets window

1. View Budgets from:
2. Copy Budgets to:
3. Copy: runs immediately with no confirmation
4. Exit

2. In **View Budgets from:**, choose the fiscal year to copy from. You can type to filter the list. Newest fiscal years appear first. The window then lists that year's budgets in alphabetical order.
3. In **Copy Budgets to:**, choose the fiscal year to copy into.
4. Select the budgets to copy in the list. To select every budget, select **Select all** instead. If you change the selection by hand after using **Select all**, **Select all** is cleared.
5. Click **Copy**. The copy runs right away, with no further confirmation. IRIS10 shows "{n} revenue budgets copied from: {from} to: {to}, successfully." Each copy keeps the source budget amount and is set to Active. Budgets that already exist in the destination year are

skipped. If nothing is copied, IRIS10 shows "No ARS budget detail records where found with that criteria to copy forward or records already exist for the destination fiscal year".

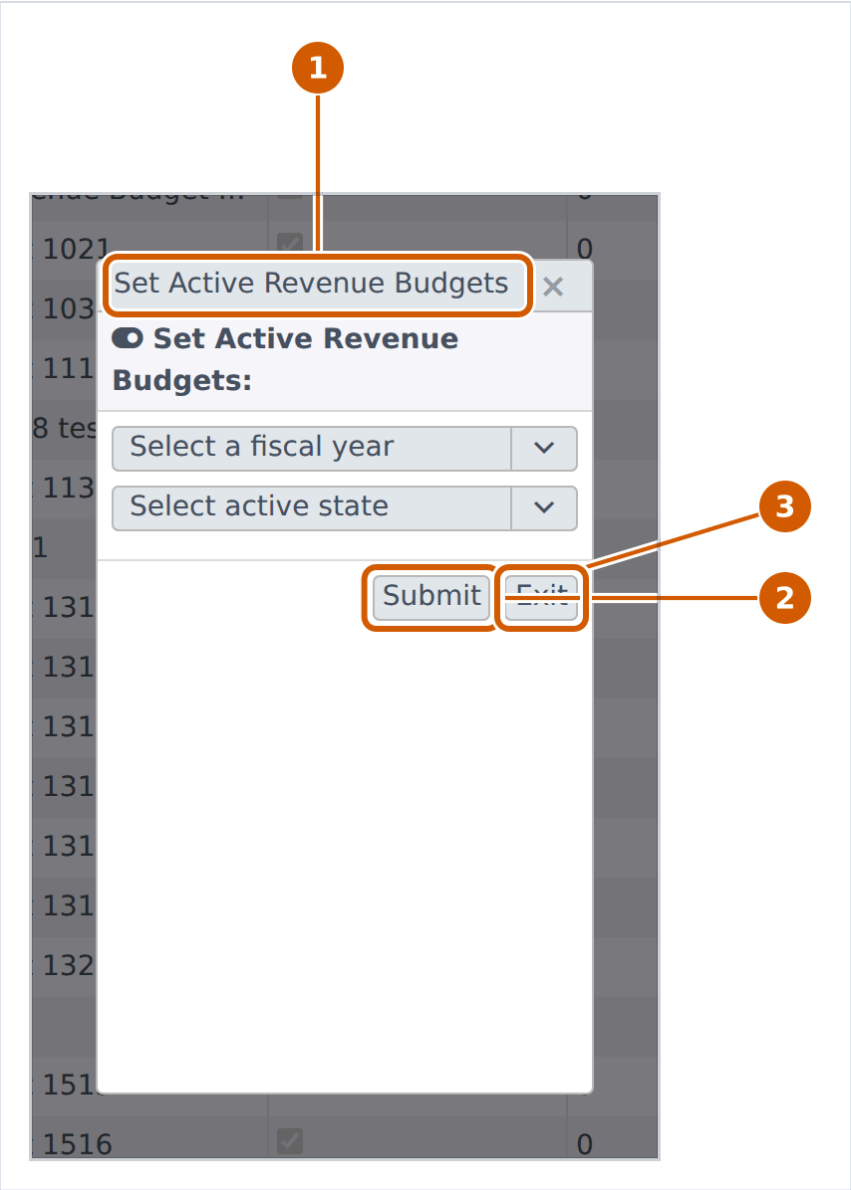
> **Note:** If either fiscal year is missing or no budget is selected, nothing is copied.

6. Click **Exit** to close the window. The window closes. **Exit** makes no changes of its own.

Set every revenue budget detail of a fiscal year to Active or Inactive

1. Click **Set Active Budgets** on the toolbar (tooltip "Click to set active state for revenue budgets by fiscal year."). This option is not on the **Options** menu. The **Set Active Revenue Budgets** window opens. If no fiscal years have budgets, IRIS10 shows "There are no budgets with associated fiscal years." and closes the window.

> **Note:** You see this button only if your access level allows it. If it is missing, ask your administrator.



The Set Active Revenue Budgets window

1. Set Active Revenue Budgets
2. Submit: changes every budget detail of the fiscal year immediately
3. Exit

2. Choose a fiscal year from the "Select a fiscal year" drop-down. A status line shows the current state of that year's budget details. See the Set Active status line table in the Reference section.
3. Choose **Active** or **Inactive** from the "Select active state" drop-down.
4. Click **Submit**. The change applies right away, with no further confirmation, to every revenue budget detail of that fiscal year, whatever is selected or filtered in the grid. IRIS10 shows "Revenue budgets for the selected fiscal year have been set to Active/Inactive successfully." and refreshes the grid and the status line.

> **Note:** If either drop-down is empty, IRIS10 shows "Please select both a fiscal year and an active state." and makes no change.

5. Click **Exit** to close the window. The window closes. **Exit** makes no changes of its own.

Reference

Revenue Budgets grid columns

COLUMN	RULES
Organization	Shown read-only in the grid. In the editor, you choose it from an editable drop-down.
Name	Required. Up to 30 characters.
Description	Optional. Up to 50 characters.
Long Name	Optional. Up to 50 characters.
Active	Selected by default for new budgets.
Attached Documents	Read-only.

Budget detail contents

ITEM	MEANING
Fiscal year	The fiscal year the budget detail applies to.
Budget amount	Defaults to 0. Stored to 4 decimal places.
Active	Shows whether the record is in use (Active) or archived (inactive). Defaults to Active.

Toolbar buttons and Options menu items

WHERE	ITEM	WHAT IT DOES
Toolbar (tooltip "Click to copy revenue budgets.") and **Options** menu > **Copy Revenue Budgets**	Copy Revenue Budgets	Opens the **Copy Revenue Budgets** window.
Toolbar only	Set Active Budgets	Opens the **Set Active Revenue Budgets** window.
Toolbar checkbox and **Options** menu	Show Inactive Budget Details	Includes inactive budget details in the grid for the current sign-in session.

Copy window fields

ITEM	MEANING
View Budgets from:	The fiscal year whose budgets you want to copy.
Copy Budgets to:	The fiscal year that receives the copied budgets.
Select all	Selects every budget in the copy list.

Set Active status line

STATUS SHOWN	MEANING
Currently Active (n records)	All of the year's budget details are active.
Currently Inactive (n records)	All of the year's budget details are inactive.
x Active, y Inactive of n records	The year has a mix of active and inactive details.
No budget details found for this fiscal year	The year has no budget details.

Messages

MESSAGE	WHEN IT APPEARS
{n} revenue budgets copied from: {from} to: {to}, successfully.	The copy finished.
There are no budgets with associated fiscal years to copy.	You opened Copy, but no fiscal years have budgets. The window closes.
No ARS budget detail records where found with that criteria to copy forward or records already exist for the destination fiscal year	Nothing was copied.
Unable to copy revenue budgets due to a technical error. An email has been sent to support.	The copy failed because of a technical error.
Revenue budgets for the selected fiscal year have been set to Active/Inactive successfully.	Set Active finished.
Please select both a fiscal year and an active state.	You clicked Submit with a drop-down empty.
There are no budgets with associated fiscal years.	You opened Set Active, but no fiscal years have budgets. The window closes.
Unable to set active state for revenue budgets due to a technical error. An email has been sent to support.	Set Active failed because of a technical error.

Tips and notes

Important: Copy and Submit act immediately. IRIS10 does not ask you to confirm. Check both fiscal years and your selection before you click.

Important: Set Active Budgets changes every revenue budget detail of the chosen fiscal year, whatever is selected or filtered in the grid.

Note: Copying copies only the budget amount, and the copies are set to Active. Budgets that already exist in the destination fiscal year are skipped, so no duplicates are created.

Note: IRIS10 remembers **Show Inactive Budget Details** only for your current sign-in session.

> **Note:** You only see and change revenue budgets for your own county.

> **Tip:** Use Inactive for budgets that are archived and Active for budgets that are in use.

Related topics

- Expenditure budgets
- Issued invoices: print, reinstate, delete and assign budgets
- Units of measure, fiscal years and organizations
- Grid viewing and editing
- Data grid overview and basics
- Security Administration: access levels by user