Pontem® General Ledger — Budget Amendment

NOTE: Budget Amendments do not change income or expense entries from any program. Remember this is an adjustment to the amount budgeted for the year in a single account. To move money from the budget of one account to another account requires two budget amendments

To amend a budget, follow these steps:

1. Click on the primary task of **Yearly Budgets**.
2. Double Click on the **Budget Year** to be amended.
3. Select the **Ledger Account Number** (1) to be amended.
    a. You can type the number (using hyphens), use the drop down menu, or use the Down Arrow on the keyboard.
4. Click the **Date** field (5) to set the effective date of the amendment.
5. Enter the **Amount of Change** (3), up or down, to the **Actual Budget Amount** (6).
    a. For an increase adjustment, use a positive number and for a decrease adjustment, use a negative number.
6. Enter any **Comments** (4) you may have such as the board meeting date, or the account number the funds were coming from, or moved to.
7. Click **Save Amendment** or **Cancel Amendment** (5).
8. Repeat steps 3 – 7 as needed.

The following reports are available to show amendment activity:

1. On the Menu bar select **Reports: Budgets: Finalized Budget: Budget Amendments Activity Report**
2. On the Menu bar select **Reports: Budgets: Finalized Budget: Budget Amendments Report**