

Budget Formulas

Last Modified on 07/02/2026 9:14 am EDT

Budget Formulas

Budgets > Global Budget Changes

The following formula calculations are available when calculating budgets. These are available on the *Budgets > Actuals/Budget* screen for calculating an individual account and *Budgets > Global Budget Changes* for calculating a range of accounts.

Percent Change

Projects the new budget based on a percent increase or decrease for a selected year. You may select actual or budget figures to compute. You can do this for an individual month by selecting the month and the column, or you can increase it for all 12 months by selecting the entire column or just the annual amount. This option can be used for multiple accounts during global budget changes. If you wish to increase by 10%, you should enter the number 10.

Average Percent Change

Projects the new budget based on an average percent increase or decrease from last or past year's actuals. If the current year is selected as one of the years, the actual/forecast column is used to compute. This option can be run for multiple accounts in [global budget changes](#).

This example formula is based on a from/to selection of 2021 to 2024. * = multiply, / = divide.

a	2024 Actual/Forecast
b	2023 Actual
c	2022 Actual
d	2021 Actual

$$x = ((b / a * 100) - 100) * -1$$

$$y = ((c / b * 100) - 100) * -1$$

$$z = ((d / c * 100) - 100) * -1$$

$$\text{AverageIncrease} = (x + y + z) / 3$$

$$\text{NewAmount} = a + (a * \text{AverageIncrease} * 0.01)$$

If a = 0, then NewAmount will be zero.

If a, b, c, & d are all positive numbers and NewAmount is negative, then NewAmount will be zero.

If a, b, c, & d are all negative numbers and NewAmount is positive, then NewAmount will be zero.

Trend Based on Past Years

Projects the new budget based on a trend from past or last year's actuals. If the current year is selected as one of the years, the actual/forecast column is used to compute. This option can be run for multiple accounts in global budget changes.

This example formula is based on a from/to selection of 2018 to 2021.

a)	2021 Actual/Forecast
b)	2020 Actual
c)	2019 Actual
d)	2018 Actual

$$\text{\$x} = a - b$$

$$\text{\$y} = b - c$$

$$\text{\$z} = c - d$$

$$\text{Trend} = (\text{\$x} + \text{\$y} + \text{\$z}) / 3$$

$$\text{NewAmount} = a + \text{Trend}$$

If $a = 0$, then NewAmount will be zero.

If $a, b, c,$ & d are all positive numbers and NewAmount is negative, then NewAmount will be zero.

If $a, b, c,$ & d are all negative numbers and NewAmount is positive, then NewAmount will be zero.

Spread Amount Based on Column

Projects the new budget for an amount to spread based on a column. You may select actual or budget figures for any year to compute. It computes for the entire column, no matter what month you have selected. This option can be used for multiple accounts during global budget changes.

When computed, if any figure remains that was not evenly distributed based on the percentage of each month, it will be added to the first month to make up the difference.

Spread Evenly Based on Amount

Spreads the amount entered evenly over the specified range of months. If you are rounding budgets, the figures will be rounded.
