First of all, you have to fill the list (D line, Function, Fund, Project, Purpose).

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Then, you can use the New Purchase Forms to create the purchase.

When you finish entering the data, click Save Record. And the data of this purchase will be saved in the Purchase List.

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**Starting Budget:**

If you want to enter the starting budget, you need to type (2021, Starting Budget) into each list (D line, Function, Fund, Project, Purpose).

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Then, use New Purchase forms to create the starting budget.

Use the drop-down list to select 2021.

Remember to save the record. The record will be saved into Purchase List.

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**Queries:**

This query contains all the purchases information.

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If you want to query some other time periods or other criteria, you can use the filter to do that.

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**Report:**

**(Detail)**

This will contain all details of the data of the purchase, it will calculate the percentage of spending, and sum of money you’ve encumbered, expended, or pending.

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**(Brief)**

This will only show some brief information of the purchase (D line, Fund ID, Project ID, etc.).

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**If you want to get the report under some queries.**

**For example: You want to query 2021’s purchase.**

* In the Query **Queries**, click (View -> Design View).

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* Enter the criteria: >= 1/1/2021.

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* Go back to Datasheet View, Save it.
* Now both Reports will show the data based on your criteria.

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