Remarks

The Budget Status by Organizational Hierarchy option enables you to review budget information for organizations.

Directions

1. Click on the hyperlinked account in Financial Advisor.
2. Scroll down to the bottom of the page and click on Budget Queries.
3. Click on the drop down box and select Budget Status by Organizational Hierarchy.
4. Click Create Query.
5. Choose the parameters you want to display on the report.
6. Click Continue.
7. Choose your budget parameters and click Submit Query.