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* . BUDGETPLAN *
*
* USER'S MANUAL *
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BUDGETPLAN is a budget planning
and accounting program for the
TI-99/4A computer. It requires
Extended Basic and a cassette
recorder with interface cables.

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INTRODUCTION

BUDGETPLAN is easy to use. If you are familiar with the computer and know how to set up a budget, you will probably only need to read the OVERVIEW, below, and how to use the FOUR FUNCTION CALCULATOR, page 8.

This manual is a complete reference guide. It is written in tutorial form and explains how to set up and plan a budget using a simple example. If you intend to follow the tutorial, the manual should be read in the order it is written. If you should decide to break the tutorial into more than one session, read page 15 for an explanation of how to save any data you may have entered, and how to re-load it again later.

OVERVIEW

BUDGETPLAN facilitates easy planning and updating of a budget. It compares planned income and expenses with actual values and calculates net income amounts, so that you can plan ahead to meet monthly commitments.

Data is presented in a spreadsheet format and the bottom of the screen always shows the menu of commands to quickly access the accounts for review and change.

The system handles up to 40 account items. The user gives each item a name and chooses to put it into one of five categories. The categories are Income, Fixed Expenses, Variable Expenses, Other Expenses and Additional Expenses. The latter three categories can be thought of as being different from Fixed Expenses, to categorize items as you wish. Names and categories may be changed or moved at any time and the system will re-sort the items into categorized groups. The commands to specify and display the categories are the first initials of each, I, F, V, O or A. Net Income, which is the difference between all Income and all Expenses, may also be displayed by pressing N.

The Review Data Screens show actual values, planned values, the differences and the totals. Data is presented in both Monthly and Yearly formats. In the Monthly format, all items in the selected category are shown for any month. In the Yearly format, data for any item is shown for every month of the year.

A Four Function Calculator is always available on the screen for figuring values prior to updating accounts.

The E and X (up/down arrow) keys move a marker to any account name or month on the screen. The account may then be entered for change by pressing the ENTER key. Alternatively, any value in the calculator display can be copied to the marked actual or planned account using the FCTN S (left arrow) or FCTN D (right arrow) keys respectively. The marker auto increments, so that on the Yearly Screens, the same value can readily be inserted into consecutive months as needed. In addition to marking accounts for change, the marker pre-selects an item prior to moving from Monthly to Yearly format and pre-selects a month prior to moving to Monthly format.

A Projection mode estimates yearly totals based on the average of actual year to date data. The user chooses the range of months to be averaged.

Cassette saving and loading of data is less than five minutes. The 40 item names and categories are stored, together with the actual and planned values of each item, for all 12 months of the year.

PRE USE CHECKS

The minimum equipment needed to use BUDGETPLAN with the TI-99/4A computer is a color or black and white TV, the Extended Basic Command Module, and a cassette tape recorder with interface cables to the computer.

You will also need a good quality C10 (five minutes per side) or longer cassette for saving and loading budget data.

If you have not already done so, it's a good idea, before setting up a budget, to verify that the recorder saves and loads programs properly. This ensures that it will also save and load budget data files reliably. Note and mark the tape recorder volume and tone control settings.

USING BUDGETPLAN

1. LOADING THE PROGRAM TAPE

Turn the computer on and select the EXTENDED BASIC option. With ALPHALOCK down, type and enter OLD CS1 or RUN "CS1". If RUN "CS1" is used, it is not necessary to enter RUN after the program is loaded. Ensure that the recorder volume and tone controls are properly set, then follow the instructions on the screen. Adjust the TV volume control during the load, so that the computer prompt tones will be heard when you are using BUDGETPLAN.

2. THE TITLE SCREEN

The left of the screen shows reminder notes which will be explained in later sections as needed.

NOTE THAT ALPHALOCK SHOULD BE DOWN

The right of the screen shows the BUDGETPLAN options. Select Option 2, ITEM SET UP.

3. THE ITEM SET UP SCREEN

You are now ready to set up the simple tutorial budget with 12 account items shown in the following table.

ITEM	CAT	ITEM	CAT	ITEM	CAT	ITEM	CAT
MDM NET	I	SAVINGS	F	CLOTHING	V	DADPERSL	O
DAD NET	I	INSUR'CE	F	GROCERY	V	EAT OUT	O
APT RENT	F	UTILIT'S	V	MDMPERSL	O	VACATION	A

The following explanation of the Item Set Up Prompts at the bottom of the screen will help you to do this.

(NOTE: If you choose to use lower case letters in the item names, the CAT initials must be upper case. Set ALPHALOCK down again when you've finished, so that the system will respond to single key commands.)

ITEM SET UP PROMPTS



Press the E (up arrow) or X (down arrow) key to move the marker symbol to any item number on the screen. It is not necessary to use the FCTN key, as noted on the Title Screen.

CHANGE:ENTER

Press ENTER to initiate insertion or change of an item name or category. The computer keyboard input prompt, a flashing black square, appears in the ITEM column next to the marker. A name may then be typed in using up to eight upper or lower case characters. The normal computer editing keys, FCTN DEL, FCTN INS, FCTN ERASE, FCTN S and FCTN D may be used during keyboard input as needed. When ENTER is pressed again, the computer accepts the name, and the prompt moves to the CAT column.

CAT:IFVOA

Press the I, F, V, O, or A key to specify the item category. When ENTER is pressed, the computer accepts the category, and the marker increments to the next item number.

BACK:9

Press 9 to go back to the Title Screen. It is not necessary to use the FCTN key. This reduces the possibility of inadvertently pressing FCTN QUIT.

15 ITEMS/CAT MAX

This is a reminder that the number of items in a category can not exceed 15. If there are more than this, and 9 is pressed, the system will exit Item Set Up, sort the items, and then automatically return for you to make the changes.

Names and categories may be input in any order using any of the item numbers. When you leave Item Set Up, the system sorts the names into contiguous item numbers and categorized groups in the order I F V O A, starting at item number 1. The sort time is shorter if the order is approximately correct. The sort only occurs if Item Set Up changes are made and typically takes from a few seconds to a minute. The worst case is 14 minutes, if the categories are entered in reversed order in five groups of eight names.

If a space is left in the CAT column for an item, that item will appear at the end of the sorted item list. It will not be shown on the Review Data Screens until a category is specified.

4. THE REVIEW DATA SCREENS

Select Option 1, REVIEW DATA, from the Title Screen. When this option is chosen, the system always goes to the Monthly format with Income items for January. Item names are shown in the same order as on the sorted Item Set Up Screen.

The Monthly and Yearly Review Data Screens always show the selected category in the top left corner, and the commands for displaying and changing data on the bottom three lines.

1. MONTHLY SCREEN COMMANDS

CAT:IFVOAN

Pressing one of these keys immediately displays the selected category. All items, up to 15 in any category I through A are shown. If N for Net Income is selected, the normal Monthly display format changes to show the sum of all Income items and the sums of all items in each of the Expense categories. The Net Income is also shown as the difference between all Income and all Expenses.

MONTH:M 1-13

The selected month is in the top right corner of the screen. When M is pressed, the 1-13 message flashes, prompting you to key in an integer between 1 and 13. Values from 1 to 12 return data for that month. 13 gives data for the sum of ALL 12 months. It is not necessary to use the ENTER key. If 10, 11, 12, or 13 is chosen, the second digit should be pressed within about a second of the first, otherwise the system will select JAN.

↑↓

The arrow keys move the marker to any item on the screen. This serves two purposes. Firstly it marks an item for data changes. Secondly it pre-selects an item prior to going to the Yearly format.

CHANGE:ENTER

ENTER is pressed to make data changes. This is discussed on page 9, DATA INPUT/CHANGE, METHOD 1.

YEARLY:Y

Pressing Y from a Monthly Screen commands the system to display data in the Yearly format.

2. YEARLY SCREEN COMMANDS

CAT:IFVOAN

If an I, F, V, O, or A key is pressed, the system shows the list of items for that category. If the item you want is not on the list, you may display the list for any other category by using an I, F, V, O or A command again. A flashing No. message prompts you to key in the number of the required item. It is not necessary to use the ENTER key, and if the chosen item number has two digits, the second key should be pressed within a second of the first. Only item numbers on the list will be accepted. After the number is keyed in, the appropriate data is displayed, with the item name at the top right of the screen. If the number 0 is selected, the sum of the data for ALL items in the chosen category is displayed for every month.

If N is pressed, the system immediately displays the Net Income (all Income less all Expenses) for each of the 12 months.

↑↓

The arrow keys move the marker to any month. This serves two purposes. Firstly, it marks a month for data changes. Secondly, it pre-selects a month prior to going to the Monthly format.

CHANGE:ENTER

ENTER is pressed to make data changes. This is discussed in detail on page 9, DATA INPUT/CHANGE, METHOD 1.

MONTHLY:M

Pressing M from a Yearly Screen commands the system to display data in the Monthly format.

5. FOUR FUNCTION CALCULATOR

The Four Function Calculator is always available on the Review Data Screens.

It can be used for figuring values, such as the sum of the months' grocery bills, prior to updating accounts.

The calculator is turned on or cleared by pressing C as shown on the screen by the command CALC ON/CLR:C. After turn on, the keyboard input prompt appears in the calculator window. You then key in a number and press ENTER. If ENTER is pressed with nothing in the window, or with spaces between digits, or with more than one decimal point, the prompt will continue flashing, waiting for a valid number to be entered. The normal computer editing keys, FCTN DEL, FCTN INS, FCTN ERASE, FCTN S and FCTN D are active during number input.

After a number is entered, you must tell the computer whether the next number to be keyed in is to be added to, subtracted from, multiplied by or divided into the previous number. This is done by pressing the + key to add, the SHIFT- keys to subtract, the * key to multiply and the / key to divide. The operation symbol +, -, *, or / then appears in the window, together with the prompt, waiting for the next number. The number is keyed in and when ENTER is pressed, the answer is given.

It is not necessary to use SHIFT to add and multiply. This allows single keystroke operations, but more important, it prevents an inadvertent QUIT command if FCTN is accidentally pressed instead of a required SHIFT for an add operation. The re-definition of these two keys is noted on the Title Screen.

The following examples illustrate several keystroke sequences. Prior to each sequence, clear the calculator by pressing C and then press C again to turn it on.

CALCULATOR KEYSTROKE EXAMPLES

8 ENTER + 1 2 ENTER gives 20

9 ENTER SHIFT- 4 ENTER gives 5

3 . 6 ENTER * 2 ENTER gives 7.2

1 8 ENTER / 4 ENTER gives 4.5

4 ENTER + 1 3 ENTER + 9 ENTER gives 26

9 ENTER + SHIFT- 3 ENTER / SHIFT- 2 ENTER gives -3

Any entered number or answer in the calculator window is retained as you move between screens. This value may be copied to any account as described on page 10, DATA INPUT/CHANGE, METHOD 2.

6. DATA INPUT/CHANGE

Data changes may be made anytime CHANGE:ENTER is displayed on the bottom of the Review Data Screens. This command is not shown for Net Income, the sum of ALL items, or the sum of ALL months, because the marker does not identify a specific account. Changes are also inhibited when the Projection mode is on.

There are two ways to input or change data.

METHOD 1. This is most useful for updating accounts each month as the year progresses. Move the marker to the desired item or month and press ENTER. The prompt appears in the \$ACT column and you key in the dollar amount, up to six digits for a positive value and five digits for a negative value. Round values to the nearest dollar because cents are not accepted. After pressing ENTER, the prompt moves to the \$PLAN column. When ENTER is pressed again, the marker increments to the next item or month. If you wish to only change one column, press ENTER without inputting data, to skip over the no change column. The keyboard input editing keys are active during data input. The inputs must be valid numbers to be accepted.

METHOD 2. This is particularly useful on the Yearly Screens, when you wish to enter the same amounts, such as planned car loan payments, or salary, for every month of the year. Enter the required value into the calculator. Move the marker to the desired month or item, then press FCTN S or FCTN D. This will round and copy the calculator value to \$ACT for FCTN S (the left arrow) or to \$PLAN for FCTN D (the right arrow). The marker automatically increments following each copy, so that by holding down the keys, the value continues to be copied down the selected column, until the keys are released. More than six digit positive numbers or five digit negative numbers are not copied. Use of the FCTN S and FCTN D keys for copying is noted on the Title Screen.

7. BUDGET PLANNING EXAMPLE

A budget planning example will be illustrated by inputting planned data for the tutorial budget. Actual accounting will start in September, but first, the budget must be planned for the entire year. Assume the following values and input them to the \$PLAN accounts only, for the months shown.

CAT	ITEM	\$PLAN	MONTHS
I	MOM NET	1000	JAN through DEC
I	DAD NET	1050	JAN through DEC
F	APT RENT	600	JAN through DEC
F	SAVINGS	250	JAN through DEC
F	INSUR'CE	210	JAN, MAR, JUN, SEP
V	UTILIT'S	60	APR through OCT
		100	NOV through MAR
V	CLOTHING	400	MAR and APR
		600	OCT and NOV
V	GROCERY	300	JAN through OCT
		450	NOV and DEC
O	MOMPERSL	150	JAN through DEC
O	DADPERSL	150	JAN through DEC
O	EAT OUT	120	JAN through DEC
A	VACATION	800	AUG and DEC

After inserting this data, press N for Net Income on the Yearly Screen. This should show a total planned NET INC for the year of \$100. If it doesn't, check your input values. The \$100 indicates that this isn't a bad yearly plan, considering that \$250 is planned to be saved every month.

The negative Net Income (Net Loss) values of -230, -380, -180, -370 and -570 in months MAR, AUG, OCT, NOV and DEC respectively show that these amounts need to be available to pay monthly bills. One way to plan this is to increase the planned monthly SAVINGS, for all the months that show a positive Net Income, by the present Net Income amount. This will reduce the new planned Net Income for these months to zero. We also reduce the planned SAVINGS, or withdraw amounts from SAVINGS, as required, to make the planned monthly Net Losses also reduce to zero.

Make these changes to the \$PLAN column for the SAVINGS account.

JAN change to	250 + 170 =	\$420
FEB change to	250 + 380 =	630
MAR change to	250 - 230 =	20
APR change to	250 + 20 =	270
MAY change to	250 + 420 =	670
JUN change to	250 + 210 =	460
JUL change to	250 + 420 =	670
AUG change to	250 - 380 =	-130
SEP change to	250 + 210 =	460
OCT change to	250 - 180 =	70
NOV change to	250 - 370 =	-120
DEC change to	250 - 570 =	-320

The SAVINGS values now show the planned monthly savings (positive) and withdrawals (negative) to meet the expected monthly expenses, with a savings goal of \$3100 for the year. The budget starts in September, so this account should never go into the red if the plan is adhered to.

BUDGET PLANNING EXAMPLE (Continued)

A review of Yearly Net Income shows that the planned values are balanced to zero for each month.

Monthly Screen reviews of Net Income for individual months, and for ALL months, show the breakdowns between categories.

A change suggests itself. The SAVINGS account no longer receives a fixed amount as was first intended. Go to Item Set Up and change the category of SAVINGS from F to V. All SAVINGS values will automatically be transferred to the Variable Expense category.

The above examples are intended to illustrate the flexibility of the system. It may be used as you choose. You might, for instance, prefer not to have a Variable SAVINGS account and instead, think of the Net Income values as indicators of money you should have available. Alternatively, you could keep the original Fixed SAVINGS account and add another account to keep track of bill paying money.

8. INPUTING ACTUAL DATA

Now that the budget is planned, we can input some actual data. The tutorial budget started in September and we will assume that the last \$ACT insertion was in February.

Normally, you will insert \$ACT amounts each month and adjust \$PLAN values to control future expenses to meet monthly and yearly goals. In order to keep things simple, we will insert \$ACT amounts that are the same, or almost the same, as the planned values for the months September through February, as if these adjustments had already been made.

Use the table on the next page to input the \$ACT values shown.

CAT ITEM \$ACT VALUES and MONTHS

I	MOM NET	995 SEP thro' FEB
I	DAD NET	1055 SEP thro' FEB
F	APT RENT	600 SEP thro' FEB
F	INSUR'CE	210 SEP, 210 JAN
V	SAVINGS	460 SEP, 55 OCT, -115 NOV -320 DEC, 430 JAN, 620 FEB
V	UTILIT'S	60 SEP thro' OCT, 100 NOV thro' FEB
V	CLOTHING	450 OCT, 550 NOV
V	GROCERY	300 SEP thro' NOV, 400 DEC thro' FEB
O	MOMPERSL	150 SEP thro' FEB
O	DADPERSL	150 SEP thro' FEB
O	EAT OUT	120 SEP thro' FEB
A	VACATION	800 DEC

The various screens now show year to date totals for actual entries, and planned totals for the whole year. Differences between actual and planned amounts are shown so that it is easy to see how the budget is being tracked. Future plans can then be adjusted accordingly.

The presently displayed differences for the months ahead, with no \$ACT values entered, are not significant at this time. However, we can estimate \$ACT amounts to the end of the year.

9. PROJECTION OF \$ACT VALUES

It is useful to be able to estimate \$ACT totals for the year, based on real \$ACT values inserted for the months to date. In this system, the estimate is based on the average of \$ACT amounts over a range of months that you specify. This gives some control over the monthly values to be averaged, and permits projections for budgets starting in any month.

The Projection mode is available on all Review Data Screens as indicated by the command PROJECT ON:P.

PROJECTION OF \$ACT VALUES (Continued)

If P is pressed with the Projection mode off, the keyboard input prompt appears, with a message, requesting you to key in and enter the first month number for the range of \$ACT values to be averaged. Then the last month number of the range is keyed in. After entry, the system averages the \$ACT values over the range of months specified, for all 40 accounts, and then returns to the current screen, with estimated \$ACT amounts and totals.

Projected amounts are indicated by bullet shaped symbols pointing to the estimated values. You may move between different Monthly and Yearly Screens as desired, to quickly review any other estimated data, without re-entering the month range. The Projection mode may be turned off at any time by pressing P again as shown by the command PROJECT OFF:P.

The system remembers the last range of months and averaged values, so that if the mode is turned on again, and no data changes were made, it is only necessary to press ENTER twice to immediately get projected data, without waiting for completion of the averaging process.

The month range numbers are treated like those on a clock face. That is, if the first month entered is say 10, and the last is 4, then months 10, 11, 12, 1, 2, 3 and 4 are averaged, and the average value is projected into the remaining months.

Estimated amounts are only as good as the data used. They can give misleading results if the averaged accounts contain numbers that are not representative of those anticipated for the remainder of the year. Take a look at some projected Yearly and Monthly Screens, using a selected averaging range from September to February, months 9 and 2. The Yearly UTILITIES total is a little high, because the winter months are averaged. The Yearly SAVINGS total is low because of larger expected savings in the April through July period, which is not included in the average.

10. SAVING DATA

Normally, data will be saved before ending a budget change session.

To save data, the DATA CASSETTE must be in the recorder.

Select Option 4, SAVE DATA, from the Title Screen. The system asks if you are sure. If you are, key in and enter Y. If any other character is entered, the system returns to the Title Screen again.

After entering Y, you are prompted to key in the date. Any characters may be used, up to a total of nine, including spaces.

After the date is entered, follow the instructions on the screen. The TV sound confirms that the computer is outputting data.

When the save is complete, the Title Screen returns and shows the date of the saved data.

The save and load times are just less than five minutes.

11. LOADING DATA

You will normally load the old data into the computer each time you work on the budget. Before doing this, the BUDGETPLAN program must be loaded, as described on page 4, LOADING THE PROGRAM TAPE.

After loading the program, select Option 3, LOAD DATA, from the Title Screen. Confirm that you wish to load data by entering Y. Then follow the instructions on the screen. You can verify that the load is taking place by listening to the TV sound.

When the load is complete, the Title Screen returns and shows the date of the loaded data.

BUDGETPLAN_USER_UPDATE

BUDGETPLAN V1.1 includes two enhancements which are not described in the User's Manual. A BUDGETPRNT program is also included so that budget data can be printed. These additional features are described here, together with some notes on using the disk versions.

BUDGETPLAN_VERSION_1.1_ENHANCEMENTS

YTD TOTALS

When the projection mode is on, the Yearly Screens also show the Year to Date (YTD) totals for \$ACT and \$PLAN, in addition to the projected year end \$ACT total and the year end \$PLAN total.

SAVING BUDGET START and YTD MONTHS

After the SAVE DATA option is selected and confirmed, you are requested to enter the budget START and YTD month numbers. These numbers are saved, so that when the data is subsequently loaded into the BUDGETPRNT program, all year to date totals and projected year end totals can be calculated and printed by the program.

BUDGETPRNT_INSTRUCTIONS

OVERVIEW

No additional equipment is required, other than a printer interface (either stand alone or TI RS232 card with Expansion Box). To use BUDGETPRNT you must first create and save some budget data using BUDGETPLAN. Then the BUDGETPRNT program must be customized for your printer as described below.

The printed reports are always on 11 inch long pages (assuming standard 6 lines per inch spacing) with all accounts on each page. If the printer can print at least 74 characters per line, you may print both quarterly reports (74 columns) and monthly reports (30 columns). If it prints less than 74 characters per line, you are restricted to 30 column reports. The reports are formatted so that by placing them side by side in calendar order, you can readily scan all monthly entries, totals and net income amounts, including year to date and projected year end summaries.

CUSTOMIZING BUDGETPRNT FOR YOUR PRINTER

This requires simple changes to the statements in lines 1, 2, 3 and 4 of the program.

First, load BUDGETPRNT by selecting the Extended Basic option and entering the OLD CSI command. After the program is loaded, use the following procedure to change the statement on each line.

Statement Change Procedure

1. Type the line number.
2. Press FCTN X (down arrow).
This brings the line number and statement onto the screen with the cursor flashing on the first character of the statement.
3. Use the FCTN D (right arrow) and FCTN S (left arrow) keys to move the cursor to the first character to be changed.
4. Type over the existing characters to make the change.
5. Verify that the total statement is exactly correct (no extra characters or spaces and any periods and quotation marks properly in place).
6. Press ENTER to complete the change.

The required changes for each line are as follows:

LINE 1

If you have a TI Thermal Printer, use:

1 SPEC\$="TP"

If you have a parallel interface printer, use:

1 SPEC\$="PIO"

If you have an RS232 interface printer, indicate the printer baud rate, as shown in this example for a baud rate of 4800:

1 SPEC\$="RS232.BA=4800"

LINE 2

This must indicate the number of characters per line capability of your printer, as shown in this example for a 40 character printer:

2 CPL=40

LINE 3

This sets the size of the left margin for 74 column printouts. For example, to center the printout on an 80 column printer, use:

3 M74=3

LINE 4

This allows you to set the left margin for 30 column printouts. For example, to center the printout on a 40 column printer, use:

4 M30=5

To center the printout on an 80 column printer, use:

4 M30=25

After making these changes, enter the RUN command. Follow the screen instructions to load your budget data and verify that it prints correctly. When you are satisfied, exit BUDGETPRNT by selecting the END option. Use the SAVE CSI command to save and check a copy of the customized program on a spare cassette. Then update the original by saving another copy over it.

NOTES FOR USERS OF THE DISK VERSIONS

1. To run BUDGETPLAN, insert the original disk and then enter RUN "DSK1.BUDGETPLAN" Data is saved on the original disk in DSK1 and has the filename BUDGETDATA
2. To load BUDGETPRNT for customizing, insert the original disk and enter OLD DSK1.BUDGETPRNT
To save BUDGETPRNT after customizing, enter SAVE DSK1.BUDGETPRNT (Be sure to test the program before saving.) Then insert a back-up disk and save another copy.
3. To make a back-up copy of BUDGETPLAN, insert the original disk and enter OLD DSK1.BUDGETPLAN Then insert the back-up disk and enter SAVE DSK1.BUDGETPLAN
4. Both programs can now be run from either disk by entering RUN "DSK1.BUDGETPLAN" or RUN "DSK1.BUDGETPRNT"
5. Budget data can be backed up by using the BUDGETPLAN SAVE DATA option with the back-up disk inserted.

12. ENDING A SESSION

Normally, you will only end a session after saving the latest data.

Select option 5, END, from the Title Screen to end a budget session. Confirm that you wish to do this by entering Y. If any other character is entered, the system returns to the Title Screen.

When a session is ended, the BUDGETPLAN program is retained in the computer and may be used again by entering RUN. However, all the data is lost and the data tape must be re-loaded.