

Finance: Module Pages

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Budgets Page: Active / Closed / Archived Tabs

The Budgets Page of the Finance Module is comprised of five tabs: Active, Closed, Archived, Reports, and Settings. The active tab you’re on is designated by the white coloration.

The “Add New Budget” button will show to the right of the budget header, regardless of which tab is open.

How To: Add a New Budget

To create a new budget within the Finance Module, go to any tab on the Budgets Page and select the “Add New Budget” button.

Budgets

Add New Budget

Active

Closed

Archived

Reports

Settings

Active Budgets

There are no budgets to display.

This opens the Add New Budget Modal.

Add New Budget

Budget Name *

Description

Account *

Search for an account

Account

Amount *

Tags

Select Some Options

Create Budget

Cancel

Input the budget name and a description.

Identify the individual to be listed as the account. Account refers to the individual whose account is linked to the budget as an owner.

You can only select one individual.

Include the budget amount.

Select any tags for categorization or security purposes.

If an individual is not associated with a budget as the account holder or an approver, they cannot be given visibility.

Click the “Create Budget” button and the newly created budget will show in the Active Budgets Table on the Active Tab of the Budgets Page.

Budgets

Add New Budget

Finance > Budgets > Active

Active

Closed

Archived

Reports

Settings

Active Budgets

Search:

☐	Account	Name	Most Recent Activity	Outstanding Items	Attachments	Pending Approvals	Total Budget	Amount Used	Amount Remaining
☐	Claypool, Robert "KT"	Marketing Supplies	--	--	--	--	\$200.00	\$0.00	\$200.00
☐	Orkus, Mitzi	Website Development	11/02/2025	--	2	1	\$12,000.00	\$4,250.00	\$7,750.00

Showing 1 to 2 of 2 entries

All budgets are grouped as active, closed or archived, and are shown in budget tables on the different tabs. A budget is only visible to account users if they are listed as the account holder of the budget or if they are listed as an approver on the budget.

If an individual is not associated with a budget as the account holder or an approver, they cannot be given visibility.

An explanation of the budget table can be found under the Understanding Budgets and Budget Items of the User Manual.

To open a budget (regardless of its status), you can click directly on the budget name or click the eyeball icon in the action column of the table.

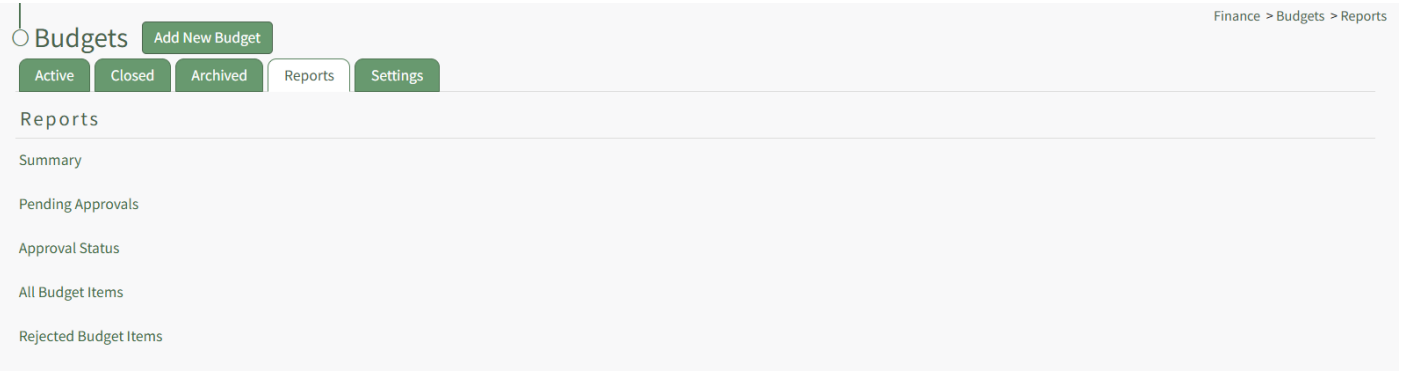
The actions available in the budget table vary by tab.

Actions Available in the Budget Table Based on Status

Tab	Actions Available
Active	View Budget, Edit Budget, Add Budget Alert, Edit Approvers / Notifications, Close Budget, and Archive Budget
Closed	View Budget, Make Budget Active, Archive Budget
Archived	Make Budget Active, Delete Budget

Budgets Page: Reports Tab

The Reports Tab highlights system reports from the Reports Module that are relevant to budgets. System Reports displayed on the Reports Tab include the Budget Summary Report, Pending Approvals Report, and Approval Status Report.



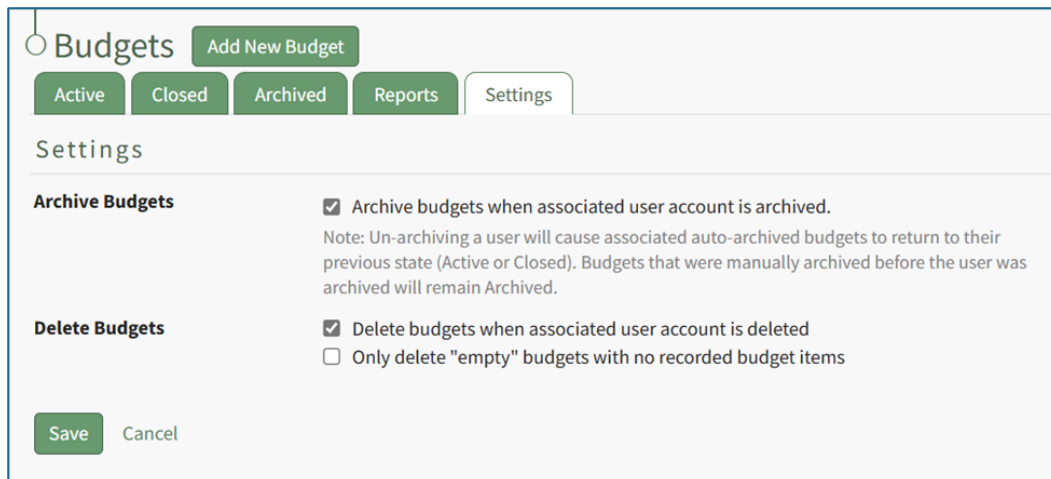
The System Budget Report Fields by Report Table below states each of the fields included in the report.

System Budget Report Fields by Report	
Report Name	Report Fields
Summary	Account, Budget Name, Amount Used, Total Budget, Percent Used
Pending Approval	Account, Budget, Budget Item, Data, Invoice Number, Attachment(s), Amount, Approve / Reject
Approval Status	Account, Student ID, Email, Budget, Budget Item, Date, Invoice Number, Attachment(s), Amount, Remaining Approvers
All Budget Items	Account, Budget, Budget Item, Date, Invoice Number, Attachment(s), Amount, View Budget Item
Rejected Budget Items	Account, Budget, Budget Item, Date, Invoice Number, Attachment(s), Amount, View Budget Item

Each report listed is a clickable link that will open in the Reports Module. A details explanation of the Report Page can be found in the User Manual under the Reports Module.

Budgets Page: Module Settings Tab

The Module Settings Tab allows an individual to customize settings for archived budgets and settings for budget deletion.



The screenshot shows the 'Budgets' module interface. At the top, there is a header with the word 'Budgets' and an 'Add New Budget' button. Below this is a navigation bar with five tabs: 'Active', 'Closed', 'Archived', 'Reports', and 'Settings'. The 'Settings' tab is currently selected. The main content area is titled 'Settings' and contains two sections: 'Archive Budgets' and 'Delete Budgets'. The 'Archive Budgets' section has a checked checkbox for 'Archive budgets when associated user account is archived.' and a note explaining that un-archiving a user will cause auto-archived budgets to return to their previous state, while manually archived budgets will remain archived. The 'Delete Budgets' section has a checked checkbox for 'Delete budgets when associated user account is deleted' and an unchecked checkbox for 'Only delete "empty" budgets with no recorded budget items'. At the bottom left of the settings area are 'Save' and 'Cancel' buttons.

Budgets will automatically be archived when the user account associated with the active budget is archived. Un-archiving a user will result in the automatically archived budgets to return to their previous state (active or closed). If the budget was manually archived before the user was archived, the budget will remain archived. You can deselect the “Archive budgets when associated user account is archived” checkbox if you do not want budgets to be archived when associated user accounts are archived.

Selecting the “Delete budgets when associated user account is deleted” checkbox will result in budgets being automatically deleted when the associated user account is deleted. When this budget setting is selected, an additional checkbox becomes available. If the “Only delete “empty” budgets with no recorded budget items” checkbox is selected, a budget will not be deleted if there are budget items recorded within the budget.

Changes must be saved by clicking the “Save” button in order for the settings modifications to be recorded by the system.

Invoices Page

The Invoices Page is populated with data from the FS Pro Integration that was built for and only accessible by a specific client's servers and thus, is presently non-functional for other clients.