

Finance Module Summary

The Finance Module allows individuals to create and manage simple budgets. Individual budget items and any relevant attachments can be added to budgets and deducted from the balance. Budget item approval and its related notifications are fully customizable, including alerts for when the remaining budget amount or percentage drops below a chosen threshold.

There is no Settings Page in the Finance Module. Module Levels for the Finance Module can be customized through the Access Level Tabs of the Site Settings Module.

How To: Create a New Module Level (Finance Module)

To access an attachment associated with a specific budget item, go to the Active Tab of the Budgets Page in the Finance Module.

Attachments can also be accessed for Closed or Archived Budgets on the appropriate tabs.

Budgets

Add New Budget

Finance > Budgets > Active

ActiveClosedArchivedReportsSettings

Active Budgets

Search:

	Account	Name	Most Recent Activity	Outstanding Items	Attachments	Pending Approvals	Total Budget	Amount Used	Amount Remaining	Actions
☐	Orkus, Mitzi	Marketing Supplies	11/03/2025	--	1	--	\$200.00	\$37.85	\$162.15	
☐	Orkus, Mitzi	Website Development	11/02/2025	--	2		\$12,000.00	\$4,250.00	\$7,750.00	

Showing 1 to 2 of 2 entries

Clicking on the attachment file number in the attachments column opens the associated attachments file name as a clickable links that, if selected, will open the attached file for viewing.

You can also access your attachments by clicking on the budget name or the eyeball icon in the actions column of the Active Budgets Table which opens the Budget Items Per Budget Table.

Website Development Budget for Mitzi Orkus: \$12,000.00

Add Budget Item

Finance > Budgets > Active > Mitzi Orkus > Website Development

Back to Budgets

Marketing Supplies

Website Development

Search:

Item Name	Date	Invoice Number	Attachment(s)	Amount	Supplier	Remaining Funds	Notes	Approval Status	Approve / Reject	Paid	Actions
October Development	10/12/2025	41	1	\$2,000.00		\$10,000.00	4 approved 1 at 30 days	Approved	Approved 2025-11-03 16:36:13	--	
November Development	11/02/2025	43	Form Entry 424.pdf	\$2,250.00		\$7,750.00	4 approved 1 at 30 days	Submit for approval	--	--	
				\$4,250.00		\$7,750.00					

Showing 1 to 2 of 2 entries

Click on the attachment’s entry for the desired budget item opening a modal with the attachment name. Click the attachment name and the attachment will automatically be downloaded to your personal device.

The User Manual for the Finance Module is updated through Version 11.12.

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