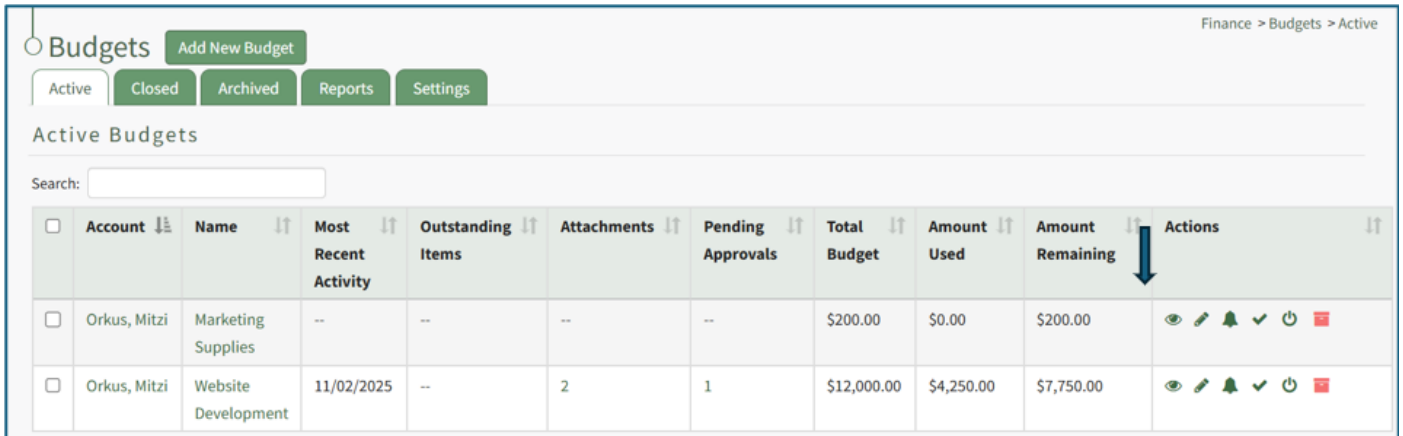


# Add a Budget Item

To add a budget item to a specific budget, go to the Active Tab of the Budgets Page in the Finance Module. Open the specific budget either by clicking the name of the budget or the eyeball icon in the action column of the desired budget.















Finance > Budgets > Active

Budgets [Add New Budget](#)

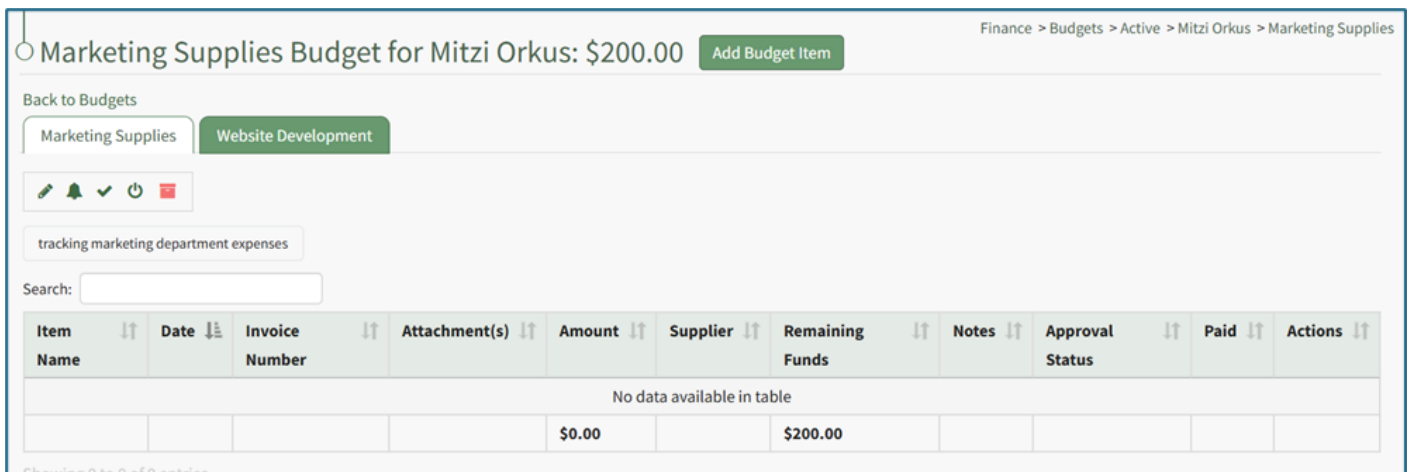
Active [Closed](#) [Archived](#) [Reports](#) [Settings](#)

Active Budgets

Search:

<input type="checkbox"/>	Account	Name	Most Recent Activity	Outstanding Items	Attachments	Pending Approvals	Total Budget	Amount Used	Amount Remaining	Actions
<input type="checkbox"/>	Orkus, Mitzi	Marketing Supplies	--	--	--	--	\$200.00	\$0.00	\$200.00	     
<input type="checkbox"/>	Orkus, Mitzi	Website Development	11/02/2025	--	2	1	\$12,000.00	\$4,250.00	\$7,750.00	     

The icon opens the specific budget, showing the Budget Item Per Budget Table.








Finance > Budgets > Active > Mitzi Orkus > Marketing Supplies

Marketing Supplies Budget for Mitzi Orkus: \$200.00 [Add Budget Item](#)

Back to Budgets

Marketing Supplies [Website Development](#)

tracking marketing department expenses

Search:

Item Name	Date	Invoice Number	Attachment(s)	Amount	Supplier	Remaining Funds	Notes	Approval Status	Paid	Actions
No data available in table										
				\$0.00		\$200.00				

Showing 0 to 0 of 0 entries

Select the "Add Budget Item" button to the right of the budget header opening the Add Budget Item Modal.

Add Budget Item
X

**Budget Item Name \***

**Date \***

**Invoice Number \***

**Amount \***

**Attachment(s) \*** Drop files here or click to upload

**Notes**

Add Budget Item
Cancel

Include the Budget Item Name and the Date. Include the invoice number, amount, and associated attachments. Multiple attachments can be included, but at least one is required. All fields, with the exception of notes, are required by the modal.

Select “Add Budget Item” from the bottom of the modal, and the budget item will now appear in the budget specific Budget Item Per Budget Table and can be submitted for approval (if approval is enabled).

Marketing Supplies Budget for Mitzi Orkus: \$200.00
Add Budget Item

Back to Budgets

Marketing Supplies Website Development

tracking marketing department expenses

Item Name	Date	Invoice Number	Attachment(s)	Amount	Supplier	Remaining Funds	Notes	Approval Status	Approve / Reject	Paid	Actions
Business Cards	11/03/2025	126	1	\$37.85		\$162.15	Proposed invoice for business cards, pending approval	Submit for approval	--	--	
				<b>\$37.85</b>		<b>\$162.15</b>					

### How To: Submit a Budget Item for Approval

Budget items can only be submitted for active budgets. To submit a budget item for approval, go to the Active Tab of the Budgets Page in the Finance Module. Open the specific budget with the budget item that needs to be submitted for approval either by clicking the name of the budget or the eyeball icon in the action column of the desired budget.

Finance > Budgets > Active

Budgets [Add New Budget](#)

Active [Closed](#) [Archived](#) [Reports](#) [Settings](#)

Active Budgets

Search:

<input type="checkbox"/>	Account	Name	Most Recent Activity	Outstanding Items	Attachments	Pending Approvals	Total Budget	Amount Used	Amount Remaining	Actions
<input type="checkbox"/>	Orkus, Mitzi	Marketing Supplies	11/03/2025	--	1	--	\$200.00	\$37.85	\$162.15	
<input type="checkbox"/>	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

This opens the budget, showing the Budget Item per Budget Table.

Finance > Budgets > Active > Mitzi Orkus > Marketing Supplies Budget for Mitzi Orkus: \$200.00 [Add Budget Item](#)

Back to Budgets

Marketing Supplies [Website Development](#)

tracking marketing department expenses

Search:

Item Name	Date	Invoice Number	Attachment(s)	Amount	Supplier	Remaining Funds	Notes	Approval Status	Approve / Reject	Paid	Actions
Business Cards	11/03/2025	126	1	\$37.85		\$162.15	Proposed invoice for business cards, pending approval	Submit for approval	--	--	
				<b>\$37.85</b>		<b>\$162.15</b>					

Showing 1 to 1 of 1 entries

To submit the budget item for approval, select the clickable link "Submit for Approval" in the Approval Status column.

Approval Status	Approve /	Paid	Actions
0 of 2			<div style="border: 1px solid gray; padding: 5px; width: fit-content;"> <p>Mitzi Orkus Nov 3, 2025 at 4:19pm</p> <p>Submitted</p> </div>

The approval status now shows how many of the required approvals have been granted. The comment icon shows the date and time the budget item was submitted for approval.

Revision #2  
 Created 2025-12-05 22:16:05 UTC by Mitzi Orkus  
 Updated 2026-01-23 21:36:27 UTC by Mitzi Orkus