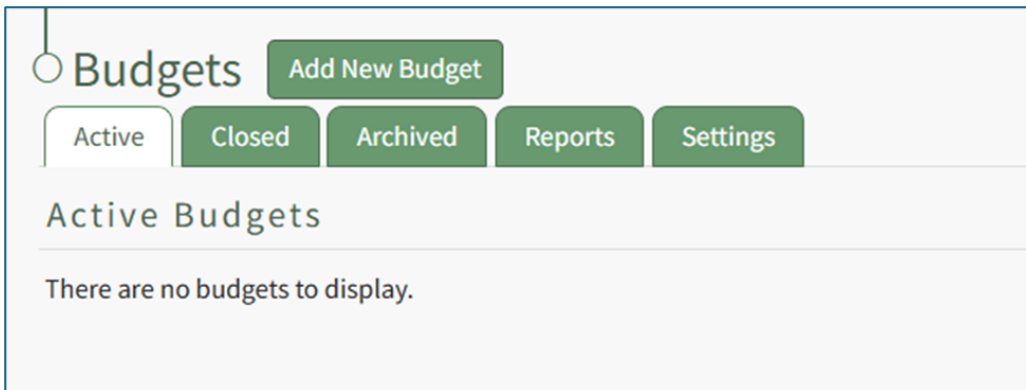
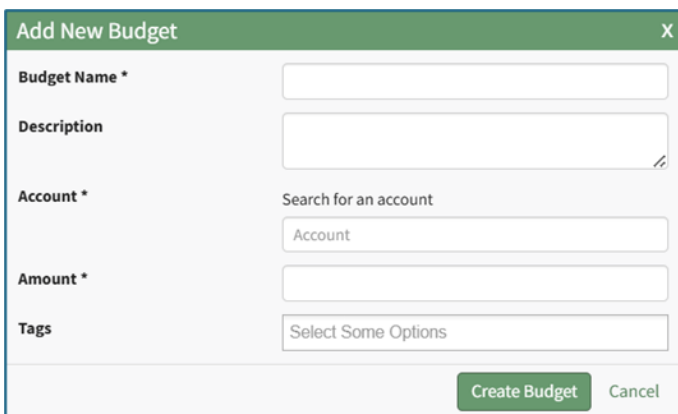


Add a New Budget

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



This opens the Add New Budget Modal.

A screenshot of the 'Add New Budget' modal window. The title bar is green with the text 'Add New Budget' and a close button 'X'. The form contains several fields: 'Budget Name *' with a text input; 'Description' with a larger text area; 'Account *' with a search input labeled 'Search for an account' and a dropdown menu showing 'Account'; 'Amount *' with a text input; and 'Tags' with a dropdown menu showing 'Select Some Options'. At the bottom right, there are two buttons: 'Create Budget' (green) and '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.

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