

Budget Management

Cybergrants Webinar



Meet Your Trainer

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Learning Objective

To review the Budget Management process and understand how to effectively oversee financial resources within your CyberGrants platform.

Agenda

Overview of Budget Management

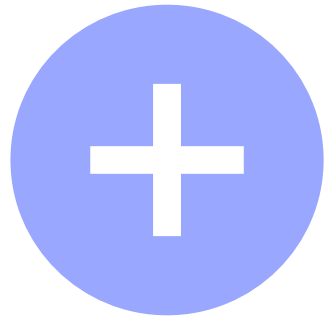
Budget Lines & Columns

Rolling Over a Budget Year

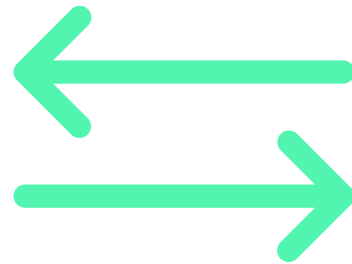
Budget Security

Overview of Budget Management

Budget Management



View, edit & create budget lines



Transfer funds between lines



Review balances, allocated funds, committed funds, paid amounts etc.



Configure user permissions for accessing budget information

Budget Management in CyberGrants

Dashboard Main Reports Surveys Mail **Budget** Admin Employee Giving Volunteer Events Insights
Access Sandbox **Megan Dodds**
5 [CyberGrants Foundation]

Budget Year 2023 ▾

Budget: \$1,000,000.00

Status: In Process

Unallocated: \$0.00

Budget

US Budget ▾

Display Level

Budget ▾

Reload

Budget Years ▶

2023 Budget Lines ▶

Print ▶

2023 Budget Lines




"+" Indicates Quid Pro Quo




2023 Budget Line	Current Budget	Balance	Allocated	Unallocated	Committed	Paid
US Budget	\$200,000.00	\$199,900.00	\$10,000.00	\$190,000.00	\$100.00	\$0.00
Florida	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Maine	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Massachusetts	\$10,000.00	\$9,900.00	\$5,000.00	\$5,000.00	\$100.00	\$0.00
Andover	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Boston	\$5,000.00	\$4,900.00	\$0.00	\$5,000.00	\$100.00	\$0.00






NOTE: Budgets are configured in the **Production** environment!

Budget Navigation Menu

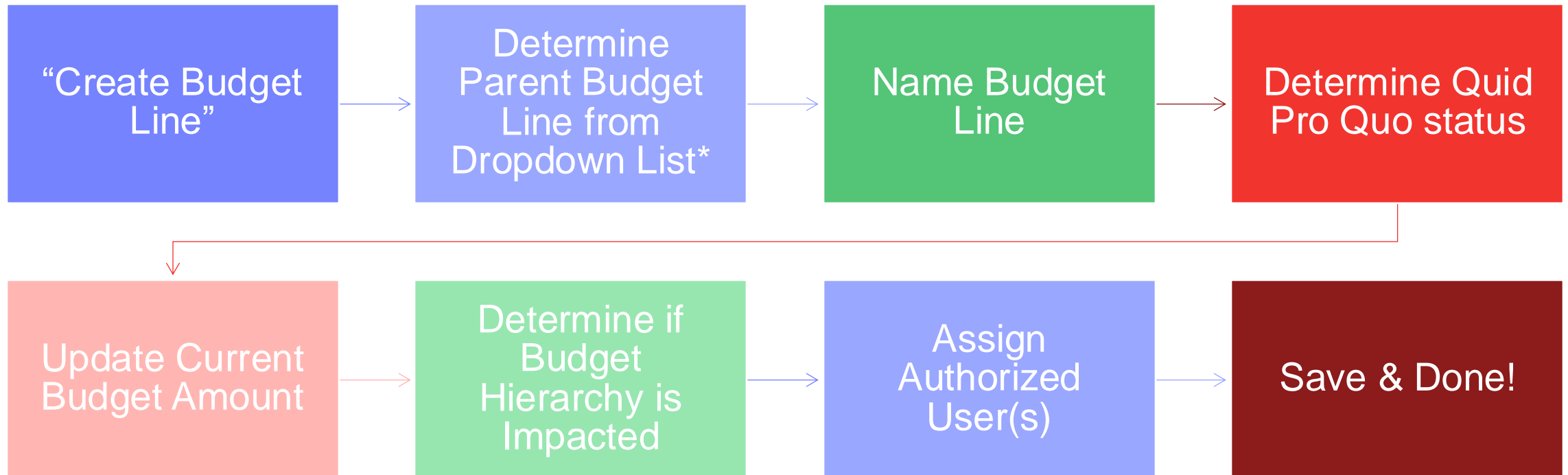
-  Budget Years ▼
 - View Budget Years
 - New Budget Year
 - Rollover Budget Year
-  **2023 Budget Lines** ▶
-  Print ▶

-  Budget Years ▶
-  **2023 Budget Lines** ▼
 - View Budget Lines**
 - Create Budget Line
 - Transfer Funds
 - Configure Budget Security
 - Compare Budget Lines
-  Print ▶

-  Budget Years ▶
-  **2023 Budget Lines** ▶
-  Print ▼
 - Print Excel Version
 - Print Word (RTF) Version
 - Print PDF Version

Budget Lines & Columns

Budget Lines



* If this item is a new top level budget line (no parent budget line), select **“Primary Bucket”**

Budget Columns

2023 Budget Line	Current Budget	Balance	Allocated	Unallocated	Committed	Paid
US Budget	\$200,000.00	\$199,900.00	\$10,000.00	\$190,000.00	\$100.00	\$0.00
Florida	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Maine	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Massachusetts	\$10,000.00	\$9,900.00	\$5,000.00	\$5,000.00	\$100.00	\$0.00
Andover	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Boston	\$5,000.00	\$4,900.00	\$0.00	\$5,000.00	\$100.00	\$0.00

Allocated

- Total amount of money a budget line has divided amongst child budgets

Unallocated

- Amount of money still available to be divided amongst the child budgets

Committed

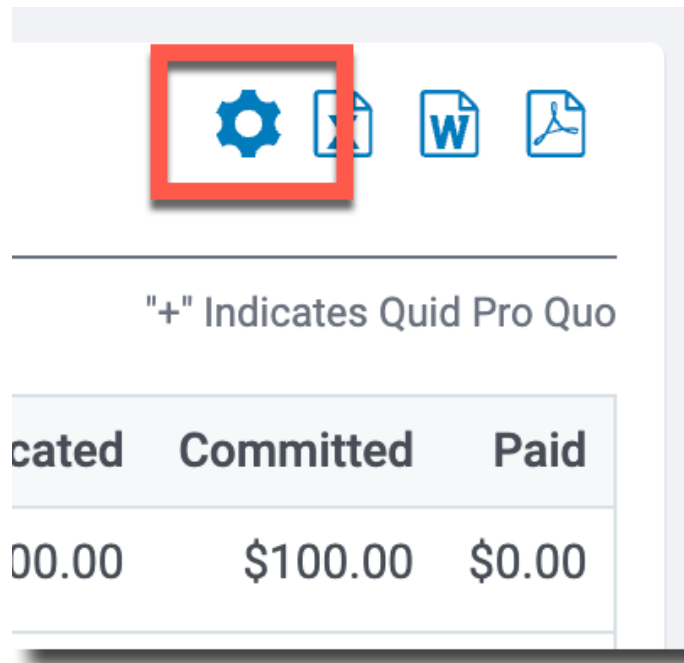
- Amount of money reserved by all non-voided payments for pending or approved requests

Paid

- Amount of money used by paid payments for approved requests

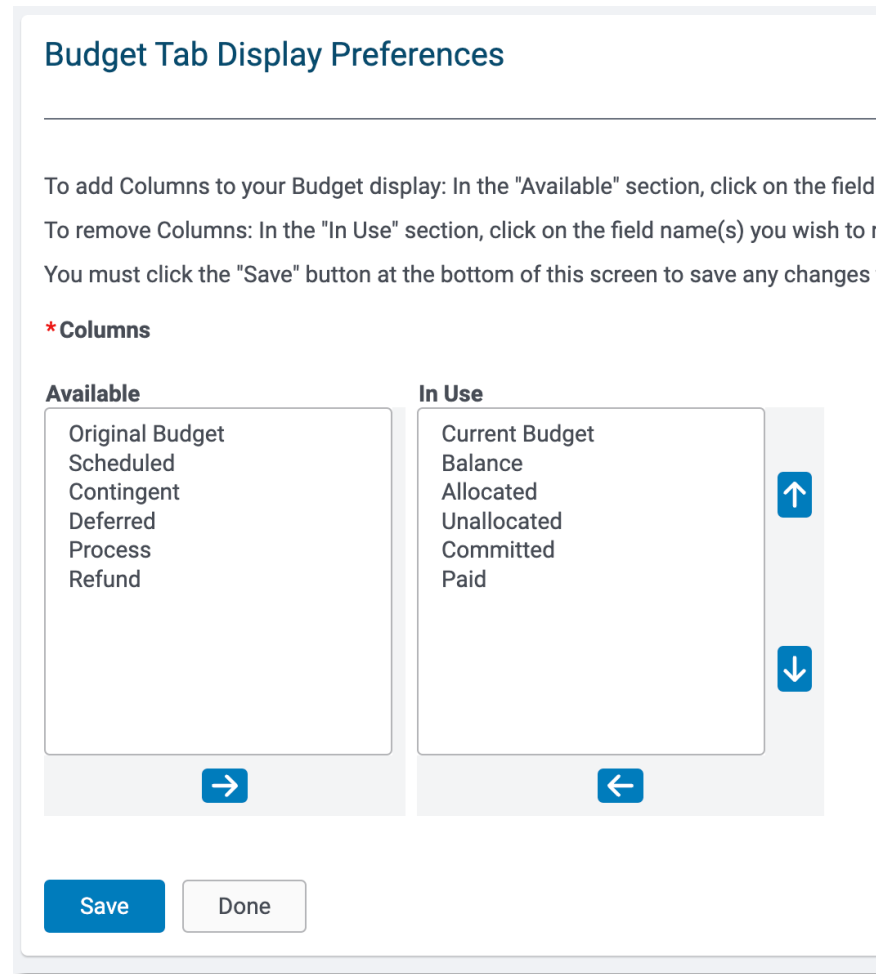
Customize the Budget Table Display

1. Select the Gear icon in the Budget Table (below)
2. Edit the Display Preferences as needed (right)
3. Save & Done!



The screenshot shows a budget table interface. At the top, there are four icons: a gear (highlighted with a red box), a document with a plus sign, a Word document, and a PDF document. Below the icons, a horizontal line is followed by the text "+ Indicates Quid Pro Quo". Below this is a table with three columns: "Allocated", "Committed", and "Paid". The values in the table are: Allocated: 00.00, Committed: \$100.00, Paid: \$0.00.

Allocated	Committed	Paid
00.00	\$100.00	\$0.00



Budget Tab Display Preferences

To add Columns to your Budget display: In the "Available" section, click on the field name(s) you wish to add to the "In Use" section.
To remove Columns: In the "In Use" section, click on the field name(s) you wish to remove from the "In Use" section.
You must click the "Save" button at the bottom of this screen to save any changes to the Budget display.

*** Columns**

Available

- Original Budget
- Scheduled
- Contingent
- Deferred
- Process
- Refund

In Use

- Current Budget
- Balance
- Allocated
- Unallocated
- Committed
- Paid

Buttons: Save, Done

Roll Over a Budget Year

Roll Over Budget Year

1. Select “Budget Years” from the Navigation Panel
2. Choose “Rollover Budget Year”
3. Enter details of Rollover Budget Year Form
4. Save & Done!

Rollover Budget Year

*** Source Budget Year:**

*** Destination Budget Year:**

*** Budget Amount:**

*** Percentage of Source Budget:**

*** Start Date:**

*** End Date:**

*** Budget Status:**

*** Allow Negative Budgets?**

Budget Security

Budget Security

Budget Year 2023

Budget: \$1,000,000.00

Status: In Process

Unallocated: \$0.00

Budget

-All-

Display Level

Budget

Reload

Budget Years

2023 Budget Lines

View Budget Lines

Create Budget Line

Transfer Funds

1 Configure Budget Security

Compare Budget Lines

Print

Configure Budget Security

Click a budget line item name to configure authorized users, or click a user name to configure accessible budgets. You can also access the [Add Budgets to Users](#) page.

2023 Budget Lines	Authorized Users
2023 - request budget - \$799,633.00	(No Authorized Users)
2023 - Test Budget - \$499,633.00	(No Authorized Users)
2023 - US Budget - \$199,900.00	• Jonathan Poon
2023 - Florida - \$0.00	• Jonathan Poon
2023 - Maine - \$0.00	• Jonathan Poon
2023 - Massachusetts - \$9,900.00	• Jonathan Poon
2023 - 2 <i>Alaska</i> - \$0.00	• Jonathan Poon
2023 - Boston - \$190.00	• Jonathan Poon

3 2023 Budget Line Security

Assign Budgets to Users Assign Users to Budgets

Additional Resources

- Help Center accessible from the top right hand user badge in CyberGrants

Additional Training Opportunities

- On-demand Videos available in our [Bonterra Academy](#)
- Additional webinars and training content to come!

Thank you for attending!

We hope to see you
in future trainings.