

Budget Development

AccuFund Onsite

Align Your Teams Around Your Budgets

The AccuFund Budget Development module enables team involvement in budget creation. Budget managers can give departments control over building their own budgets, yet still monitor progress and revisions through the approval process.

Budget Development allows you to have all your budget and actual history right at your fingertips. Quickly review year-over-year changes and predict revisions using a prior time period's budget or actuals. You can even increase or decrease the amounts by the specific percentages in the process.

With Budget Development you can make direct entries and easily change amounts, knowing that the worksheet will make the recalculations automatically. Line-item details can be viewed with a single click, and notes can be inserted to provide explanation for particular entries or changes, such as why an increase was made.

Budgets and worksheets can be built and tailored to your specific needs and preferences. You can build budgets by multiple organization levels or single levels, such as department, cost center, or grant program. You can also create individual revenue and expense worksheets for each department.

Budget Development Online Version

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Update worksheet [001 000 - General]

WORKSHEET

- BUDGET
- USER ACCESS (7)

	Annual Budget	YTD Actual	Budget	Budget	Notes
	06/2015	06/2015	Rev 1	Rev 2	
State Grants					
001 000 4100 00 State Grant Income	0.00	0.00	17,000	18,500	Expeting extra funds here.
Total State Grants	0.00	0.00	17,000	18,500	
Local Grants					
001 000 4200 00 Local Grant Income	0.00	0.00	10,000	9,500	
Total Local Grants	0.00	0.00	10,000	9,500	
Other Income					
001 000 4300 00 F1 Water Fees - Cor	0.00	0.00	0	0	
001 000 4990 00 Miscellaneous Incom	0.00	0.00	9,000	12,000	increased Fundraising Activites
Total Other Income	0.00	0.00	9,000	12,000	
Total Revenue	0.00	0.00	58,000	65,000	
Expenses					
	0.00	0.00	0	0	

Quick + Add Change Expand Contract

Import Be-Calc Calculate Expr Undo

Next OK Cancel

Streamline Your Entire Budget Development Process

A built-in, budget-building wizard walks your budget managers through all the steps you need to get your budgets started, and makes it easy to choose the date ranges, funds, cost centers, and historical data that needs to be included.

- Each Budget Development project is centered around easy-to-follow worksheets, which contain elements of your organization's accounting structure.
- You decide who can view and edit budget worksheets.
- Once a department head has worked on a worksheet, it can be marked as completed or locked.
- When a budget is completed and locked, Budget Development will automatically distribute budgets according to the periods you specify: annual, quarterly, seasonal, or monthly.
- New budgets can be distributed based on the prior year's actuals or historical data.
- After distribution, the budget is posted to the General Ledger for financial reporting purposes.
- When revisions are necessary, Budget Development lets you enter them line by line or by making calculations, such as multiplying figures by a certain number or percentage.
- When changes are made, Budget Development will show the difference between the earlier and changed entries.
- Sub-totals can be defined in the worksheets, allowing you to create categories and sub-categories, if necessary.
- Notes can be entered on any line in a budget or worksheet to explain a revision.
- Create and analyze numerous what-if scenarios ("What if I get 100 more clients?" "What if I charge more for my services?").
- Create Grant or Project Budgets across multiple fiscal years.
- A specialized report writer makes it easy to report selected information for each budget.
- "Quick Report" functionality lets users print any screen and export budgets to Microsoft Excel.

Distribute budget

Distribute

All in the first period (Annual Budget)

Evenly across all periods

By Distribution Table

Table

Based on last years posting for account

Post Type

Based on this years posting for account



Post Type

Apply to

Account "None Selected"

Classification "GRRevExp"

Worksheet

OK Cancel

Let's Get Started

AccuFund supports your mission with a full suite of financial management applications for nonprofit and government organizations. To learn more and arrange a demo, contact AccuFund at 877-872-2228 or sales@accufund.com or visit www.accufund.com.

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