



FundWare Budget Prep

- Restrictions on how and where money can be spent.
- Audit requirements.
- Collaboration with multiple entities and individuals.

These are just a few particulars specific to the budget preparation process of mission-based organizations, and the reasons why working with software made for the for-profit sector is frustrating and time consuming.

Kintera **FundWare's Budget Preparation** module was built with your needs in mind. Budget Preparation works within FundWare, while allowing you to export and import from Microsoft® Excel. This makes developing budgets and transferring data back to your ledgers much simpler. Budget Preparation also allows you to develop and save multiple budget scenarios. And, the entire process features the ease-of-use and powerful functionality for which FundWare is known.

Create budgets by program, grant, department, cost center, or any other designation. Managers easily create their own budgets, while senior management reviews, consolidates, and modifies information for organization-wide reporting and central approval.

[www.kintera.com/fundware](http://www.kintera.com/fundware)

## FEATURE HIGHLIGHTS:

### Budget for Multi-Year Grants and Programs

**Multiple budget periods** – Budget Preparation allows you to budget for the entire fiscal year or for various periods and objectives simultaneously.  
**Budgeting cycles** – Manage unlimited budgeting cycles, allowing simultaneous modification of the current year's budget and posting of next year's projected budget.

### Process Easy Reviews & Modifications

**Collaboration tools** – Export budget worksheets to Microsoft® Excel or HTML for collaboration with remote users, modifications, or distributions.  
**Incorporate revisions and changes** – Import budget changes made using Microsoft® Excel with one-click imports into Budget Preparation.

### Enjoy Powerful Flexibility and a Complete Audit Trail

**Auto posting** – Post automatically to FundWare General Ledger Project/Grant, creating detailed budget transactions for powerful online budget control and reporting with full audit trails.  
**Always-current data** – Update your budget worksheets from your ledgers at any time, so you're always working with the latest numbers.  
**Customized worksheets** – Define up to 99 separate worksheets to meet your specific budgeting needs.  
**Audit trail** – Posting initial and revised budgets creates an audit trail, allowing you to trace your entire budgeting process (e.g., for GASB requirements).  
**Documented assumptions** – Document budget assumptions for each worksheet, column, and/or cell, with detailed comments on the budgeting process.  
**Custom distribution tables** – Distribute your budget automatically by fiscal period using unlimited custom distribution tables.

Stat	Account	Description	Actual 07/31/2006 - 06/30/2007	Budget 07/31/2006 - 06/30/2007	Projection 07/31/2006 - 06/30/2007	Revision1
1 A	A000 4010-00 0	Individual Donations	\$5,388.00	\$20,000.00	\$5,388.00	\$5,388.00
2 A	A000 4510-00 0	State Grant	\$42,000.00	\$42,000.00	\$42,000.00	\$42,000.00
3 A	A000 4520-00 0	Federal Grant	\$0.00	\$0.00	\$0.00	\$145,000.00
4 A	A000 5900-00 0	Other Income	\$30,500.00	\$16,700.00	\$30,500.00	\$30,500.00
5 A	A000 7210-00 0	Salaries of officers	\$97,114.78	\$95,000.00	\$97,114.78	\$97,114.78
6 A	A000 7230-00 0	Hourly wages	\$1,138.29	\$1,700.00	\$1,138.29	\$1,138.29
7 A	A000 7310-00 0	Pension plan contributions	\$2,851.68	\$3,000.00	\$2,851.68	\$2,851.68
8 A	A000 7320-00 0	Other employee benefits	\$7,312.50	\$7,200.00	\$7,312.50	\$7,312.50
9 A	A000 7410-00 0	Payroll taxes, etc.	\$7,272.01	\$7,200.00	\$7,272.01	\$7,272.01
10 A	A000 7710-00 0	Supplies	\$582.95	\$300.00	\$582.95	\$582.95
11 A	A000 7810-00 0	Telephone	\$1,238.08	\$480.00	\$1,238.08	\$1,238.08
12 A	A000 7910-00 0	Postage and shipping	\$235.84	\$80.00	\$235.84	\$235.84
13 A	A000 8010-00 0	Rent	\$2,025.21	\$875.00	\$2,025.21	\$2,025.21
14 A	A000 8020-00 0	Utilities	\$1,521.39	\$600.00	\$1,521.39	\$1,521.39

With Budget Preparation, you can work with an almost unlimited number of scenarios while you craft your budget.

**Powerful Flexibility**

- Interfaces with Microsoft® Excel
- Customizable period columns
- Flexible date ranges
- Create new accounts, which are then added to General Ledger–Project/Grant
- Unlimited user worksheets
- Up to 99 saved revisions per worksheet

**Reports**

- Detail & summary reporting
- Customizable columnar presentation

**Budget Process**

- Create budgets that cross fiscal years
- Modify by percent or amount
- Refresh accounts and historical data from General Ledger–Project/Grant
- Add comments to individual cells, columns, and/or worksheets
- Distribute evenly or use predefined tables
- Post initial and revised budget to General Ledger
- Posted log shows changes by user and date
- Export budgeting information to Microsoft® Excel or HTML

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