

# Quadpro Help Desk

**Create a New Budget**

### Adding Budgets:

Budgets can be used within Quadpro to manage your finances after each expenditure and also to plan ahead for the future.

To access the budget screen , use the establishment inspector on the right hand side and select 'Budgets' under finance. Alternatively this can be accessed via the top toolbar under Finance > Budgets.

Once you are in the budget home screen it will be displayed like the image below. There are two sections for budgets. Main Budget and Sub Budgets.

[illegible]

The main budgets cover the finances your establishment has for each department, for example Planned Maintenance and Staff Property. Sub Budgets cover categories such as Building Materials and Building Contractors, both are which under Planned Maintenance but are separated to ensure costs are used correctly.

These budgets are all linked together when you make a Job Request or a Works Orders, and as you start to place them the remaining budget total decreases in relation to the monies spent on that department.

### **Setting up a new Main Budget:**

To add a new main budget, select 'add' at the bottom of the list box.

The following box will open for you to then add information to.

### Main Budget

Name	<input type="text"/>	144
Year	<input type="text" value="2019"/>	Code <input type="text"/>
Budget Amount	<input type="text" value="£0.00"/>	
Expenditure	<input type="text" value="£0.00"/>	
Remaining	<input type="text" value="£0.00"/>	
<b>Notes</b>		
<div><div></div><div></div></div>		
<div><div><div>◀</div><div>▶</div></div><div>Save</div><div>Cancel</div></div>		

Below will outline the headings for each part of this box

## Main Budget

Name	Maintenance Budget	144
Year	2019	Code MABU
Budget Amount	£100,000.00	
Expenditure	£0.00	
Remaining	£0.00	

**Notes**

Budget for Site Maintenance

◀

▶

Save

Cancel

### **Budget Name:**

Designate the name of this budget that your bursar has given you so you can easily reference this budget when needed.

### **Year:**

Select which financial year you want this budget to be associated with.

### **Code:**

Enter a code which you want to identify this budget with.

### **Budget Amount:**

Enter the amount that you have been allocated for this budget.

### **Expenditure:**

As you issue Job Requests and Works Orders related to this budget your expenditure will increase. This will display here.

### **Remaining:**

Much like expenditure, this budget will decrease showing you the total amount of funds you have left for the year.