Budget Maestro Training 3 – Entering Expense Data

1. Be sure that you have selected the **Entities (Master)** option under Starting View.

2. If you do not see the Entity names, you can right click on the Entities column, select **Display Options**, then choose **Name and Description**.

3. Click the **Expense** icon.
4. The **Advanced** view will open up by default. Data entry can be done in the **Advanced** view but **Simple** view makes it easier to accomplish.

![Budget Maestro 7 interface](image)

5. The **Benchmark** area at the bottom will help you discover how you have been spending your money in the previous years. Benchmark is only available in Simple mode.

![Benchmark interface](image)
6. To change the requested amount for the upcoming year, click in the entry for the Amount column and enter a new value.

7. After entering a new value, you can click the icon in the upper left to view the new spread for the upcoming year. By default, the values will be spread evenly over 12 months based on the chosen Spread Method.
8. To enter data for a specific period, click the **Properties** tab in the upper right. Values for the different periods can be adjusted manually in this area.

9. After making the changes to the periods, you’ll notice that the Input Basis Type for this entry changes from **Simple Auto** to **Manual** and the color will also change from blue to teal.

10. If you are making changes like requesting more money, you will also want to add a note to indicate the reason. Click on **Advanced** on the toolbar.
11. Click in the Description field and enter a message specifying the changes. Note: These fields are limited to 128 characters or less. You can see the Expense (Input) column has been updated to Manual based on the previous changes.

12. Description 1 and Description 2 are showing currently. If you need more room to type additional details, you can right click on the row next to Description and select **Column Chooser**.

13. A Column Chooser window will appear. You can then click and drag additional columns (like Description 4 or End Date) to add more flexibility.

If you have technical questions about the tool contact Karl Carter karl.carter@bucks.edu ext. 8548
If you have budget questions about the process contact Loren Herbert Loren.Herbert@bucks.edu ext. 8638
For a video of this training material