Budget Maestro Training 4 – Entering Capital Requests

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

2. Click the **Expense** icon.

3. To add money into a particular line item, click on the value. An input area will appear that will allow you to enter an amount.
4. After adjusting the expense for the line item, you may want to add a description for the change. Click in the **Description 1** field to type in a note.

5. If you wish to add an additional amount to the same line item, click the **Add** button on the toolbar.

6. This will show up as Undesignated (Expense). Click the Expense (G/L Account) field to select the appropriate account. You may need to scroll on the list to find it. Repeat the previous steps to add values and descriptions as needed.
7. Click the **Welcome Page** option in the upper left corner and click the **Reports** icon.

8. Click the Report Profile drop down menu and select the **Department Expenses** profile.

9. Click the **Column Options (Drill Down)** tab to ensure that the descriptions from the previous steps have been added to the report. Find the Description 1 (and any other values), select it, and click the >> to add it to Selected Columns.
10. After the columns have been added, click **Drill Down Report** in the lower right corner.

11. The report will be generated after a few moments. Click the + icon to expand the values. You’ll notice the Description 1 and Description 2 columns are present in this report. You may want to **Export to Excel** or **Print** from this screen to have an additional copy of this report for future reference.

![Report Table]

For a video of this training material