

Philanthropy Online Budget Instructions

These instructions will help you complete or change a budget anywhere on the Greater Milwaukee Foundation's Web site. These include:

- The organization's budget on your organizational profile
- The project budget in a grant application you complete online to submit a proposal

When you get to a budget page, you are prompted to enter a budget name, start date and end date.

For grant applications: If your proposal is a multi-year request, you have the option to add multiple budgets. Once you complete the first budget, click on the button "Create New Budget" at the top of the page and enter the name, start and end dates for the next budget. Please make sure to format the dates properly. **MM/DD/YYYY**

There are two types of budget items on the budget page, main categories and expanded categories. Not all applications will include expanded categories. The main categories only require that you enter a budget amount, if appropriate, in the box to the right of the default description. The system will calculate totals when you click on the save button at the bottom of the page.

The expanded categories, such as "Foundation Grants", require you to provide additional detail. In the "Income" section of the budget page, the additional information required is a description, the committed amount, and the pending amount. When you tab to a new field, the system will add the committed and pending amounts together to get a subtotal for that budget item. To add items, click on the "Add Line Item". **If you need to add more than 4 items, click on the "save" button after each 4 items you have added. Once you click on the save button, the "Add Line Item" button will reappear and you can continue adding lines.**

In the expense section of the budget page, the additional information required is a description and the amount.

Definitions:

- Committed: You have received notice that you will be awarded funding from that source.
- Pending: Your request for funding is still under consideration. The funding source has not yet made a final decision. **Please include the Greater Milwaukee Foundation in your pending income.**

To remove budget items, delete the description, and amount(s) and click on "Save" at the bottom of the page. The item will be removed. This must be done individually for each item you would like to delete.

If you have budget items that are not represented by the categories listed on the income or expense sections, use "Other" to enter a description of the item and the amount(s). **Please add a budget narrative for any items that need further explanation.**

If you are having problems with the budget, please check the following:

1. When deleting a line item, delete the description, and amount(s) and clicked on "Save" at the bottom of the page. This must be done individually for each item you delete.
2. The name of the budget is not more than 40 characters.
3. You have entered the date range in the correct format. You can either manually type it in using the following format **MM/DD/YYYY** or click on the calendars and to select dates.
4. When you are entering a new **organizational budget** for the current year, do not try to update the previous year's budget with the new numbers. You have to create a totally new budget for the year. Click on **Create a New Budget** and begin entering the current figures there.