

FINANCIALS: BUDGETS

A budget enables you to forecast income and expenses, and compare those forecasts to the actual results obtained during one or more previous years, itemized by months or quarters.

Create a New Budget

Set up a budget for a new time period or purpose.

Click on the “Financials” tab to open it and the “Budgets” tab to view the summary screen, which shows any budgets you already created.

To create a new budget, click on the “+ Add New Budget” button at the top right of the window. This opens the ADD BUDGET window.

In the window that opens, type a descriptive name for the budget in the “Budget Name” box. Click on the “Add” button to create your budget.

In the “EDIT BUDGET” window that opens, click on the “+Add Year” button to enter a year to include in this budget. Enter the year in the box and click on the “Add” button to incorporate the year.

Once you have added a year to the budget, the year appears with a disclosure arrow that reveals additional choices about how to display data for that specific year. Click on the arrow to open the options area. Set the “month/quarter” radio buttons to “Budget by month” or “Budget by quarter” (the default). Once you select either month or quarter as the budgeting interval, the months or quarters appear as individual buttons. Click on the name of any month or quarter to remove it from your budget. Click on the “Update” button to save your changes.

Click on the “+Add Accounts” button to select parent accounts or sub-accounts to include in your budget.

The screenshot shows the 'BUDGETS' summary screen in the hoastart interface. The sidebar on the left has the 'Budgets' tab highlighted with a pink box. The main content area shows a table of budgets with columns for Budget Name, Start Date, Modified Date, and Actions. A '+ Add New Budget' button is highlighted with a pink box in the top right corner.

BUDGET NAME	START DATE	MODIFIED DATE	ACTIONS
2023 Alpine Creek Budget	March, 2024	April, 2024	
2023 Annual Community Fundraiser Budget	January, 2024	April, 2024	
2023 Clubhouse Annual Budget	March, 2024	April, 2024	
2024 Alpine Creek Budget	December, 2023	January, 2024	
2024 Annual Community Fundraiser Budget	January, 2024	April, 2024	
2024 Clubhouse Annual Budget	March, 2024	April, 2024	

The screenshot shows the 'ADD BUDGET' window. It has a 'Budget Name*' field and an 'Add' button. The 'Add' button is highlighted with a green box.

The screenshot shows the 'EDIT BUDGET' window. The budget name is '2024 Community Pool Budget'. Below it, there's a section for 'Select Budget Year(s) and Month(s)/Quarter(s):' with a '+ Add Year' button and a dropdown menu showing '2024'. There are also buttons for '+ Add Accounts' and 'Delete Rows'. Below this, there are sections for 'Income' and 'Expenses', each with a 'No rows added' message.

The screenshot shows the 'ADD YEAR' window. It has a text input field containing '2025' and an 'Add' button. The 'Add' button is highlighted with a green box.

The screenshot shows the 'Select Budget Year(s) and Month(s)/Quarter(s):' window. It has a '+ Add Year' button and a dropdown menu showing '2024'. Below this, there are radio buttons for 'Budget by month' and 'Budget by quarter', with 'Budget by quarter' selected. There are also buttons for 'Update' and 'Cancel'. Below this, there are buttons for 'Q1', 'Q2', 'Q3', and 'Q4', and a checkbox for 'Remove this year'.

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In the “ADD ACCOUNT(S)” window that opens, activate the checkbox in front of any account from which you want to include income and/or expenses. To include sub-account(s), select them individually. To remove an account from your budget, deactivate its checkbox. (Note that this does not remove the account from the overall Financials feature.) Click on the “Add” button to select the accounts you have chosen and return to the “EDIT BUDGET” window.

- ◆ Note that selecting a parent account in the “ADD ACCOUNT(S)” window does not add its sub-accounts to the selection automatically, but selecting a sub-account selects its parent account automatically.
- ◆ To search for an account, type all or part of its name in the “Search accounts...” box. Delete your search term from the “Search accounts...” box to display the full list of account names in the “ADD ACCOUNT(S)” window.

The screenshot shows the "ADD ACCOUNT(S)" window with a search bar at the top. Below the search bar, there are two sections: "Income" and "Expenses". Each section contains a list of accounts with checkboxes next to them. The "Income" section includes accounts like Amenities (0100), Clubhouse (0101), Golf - Greens Fees (0103), Chair Pool Rental (0106), Tennis Courts (0102), Golf - Cart Rental (0104B), Golf - Range Balls (0105), Annual Community Fundraiser (0200), Chili Cook-off (0202), 5K Turkey Trot (0201), Community Payments (9999), Member Fees (0000), Dock Fees (0003), Annual Dues (0001), Parking Garage (0005), Outdoor Grill (0004), Pool Membership (0002), and Stripe Fees (0006). The "Expenses" section is currently empty. At the bottom right, there are "Add" and "Cancel" buttons. A small red asterisk indicates that the account name is required information.

To delete one or more accounts from your budget, click on the checkbox in front of each row you want to delete and click on the “Delete Rows” button to remove the selected rows.

When you are happy with your budget setup, click on the “Save Budget” button to return to the individual budget overview screen. From this screen, click on the “Edit Budget” button in the upper corner to continue editing or the “Back to all budgets” link to return to the main BUDGETS summary screen.

The screenshot shows the "2024 COMMUNITY POOL BUDGET" summary screen. The table displays the following data:

	Q1 2024	Q2 2024	Q3 2024	Q4 2024	TOTAL
Summary					
Total Income	132,578 / 0	0 / 0	0 / 0	0 / 0	132,578
Total Expenses	0 / 0	0 / 0	0 / 0	0 / 0	0
Net Difference	132,578/0	0/0	0/0	0/0	132,578

Budgets Summary Screen

The BUDGETS summary screen provides you with options to search, sort, and manage the overall view of budget data.

The “Search Budgets” box enables you to search among your budgets to find entries that match a specific budget name. Click on the “Search” button to do your search.

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◆ To sort your search results by one of the categories of information in the budget list, click on a column name or the pair of arrows to the left of the name. By default, the records sort in alphanumeric order. To reverse the order, click on the pair of arrows again.

◆ Click within the row of any budget in the list to open the BUDGETS overview screen.

From the main BUDGETS screen, the “Actions” column’s three-dots menu gives you access to more options.

BUDGET NAME	START DATE	MODIFIED DATE	ACTIONS
2023 Alpine Creek Budget	March, 2024	April, 2024	View Budget Info Download CSV Deactivate Budget Duplicate Budget
2023 Annual Community Fundraiser Budget	January, 2024	April, 2024	
2023 Clubhouse Annual Budget	March, 2024	April, 2024	
2024 Alpine Creek Budget	December, 2023	January, 2024	
2024 Annual Community Fundraiser Budget	January, 2024	April, 2024	
2024 Clubhouse Annual Budget	March, 2024	April, 2024	
2024 Community Pool Budget	April, 2024	April, 2024	

◆ To view the budget overview screen, choose “View Budget Info.”

◆ To download a spreadsheet-compatible file that contains your budget data, choose “Download CSV.”

◆ If you no longer need a specific budget, choose “DEACTIVATE BUDGET?” to deactivate it

◆ Deactivated budgets are hidden from view but not deleted. If you want to remove a budget permanently, delete it. In the “BUDGETS” window, activate the “Show Inactive” toggle switch at the top right and locate the budget name in the list. Deactivated items appear with a light gray background. In the “Actions” column, open the three-dots menu and choose “Delete Budget.” From the same three-dots menu, you also can click on “Reactivate Budget” to reactivate a budget.

◆ To create a copy of a budget, choose “Duplicate Budget.””

If you have additional questions about the Financials Budgets, please visit the Support Desk through your Admin Dashboard and open a support ticket.

