

Finance: Introduction

- [Finance Module Summary](#)
- [Understanding Budgets and Budget Items](#)
- [Understanding Budget Item Approval and Approval Notifications](#)
- [Understanding Budget Alerts](#)
- [Finance Module: Module Level Permissions](#)
- [Customizable Tables in the Finance Module](#)

Finance Module Summary

The Finance Module allows individuals to create and manage simple budgets. Individual budget items and any relevant attachments can be added to budgets and deducted from the balance. Budget item approval and its related notifications are fully customizable, including alerts for when the remaining budget amount or percentage drops below a chosen threshold.

There is no Settings Page in the Finance Module. Module Levels for the Finance Module can be customized through the Access Level Tabs of the Site Settings Module.

How To: Create a New Module Level (Finance Module)

To access an attachment associated with a specific budget item, go to the Active Tab of the Budgets Page in the Finance Module.

Attachments can also be accessed for Closed or Archived Budgets on the appropriate tabs.

Budgets

Add New Budget

Finance > Budgets > Active

ActiveClosedArchivedReportsSettings

Active Budgets

Search:

	Account	Name	Most Recent Activity	Outstanding Items	Attachments	Pending Approvals	Total Budget	Amount Used	Amount Remaining	Actions
☐	Orkus, Mitzi	Marketing Supplies	11/03/2025	--	1	--	\$200.00	\$37.85	\$162.15	
☐	Orkus, Mitzi	Website Development	11/02/2025	--	2		\$12,000.00	\$4,250.00	\$7,750.00	

Form Entry 422.pdf
Form Entry 424.pdf

Showing 1 to 2 of 2 entries

Clicking on the attachment file number in the attachments column opens the associated attachments file name as a clickable links that, if selected, will open the attached file for viewing.

You can also access your attachments by clicking on the budget name or the eyeball icon in the actions column of the Active Budgets Table which opens the Budget Items Per Budget Table.

Website Development Budget for Mitzi Orkus: \$12,000.00

Add Budget Item

Finance > Budgets > Active > Mitzi Orkus > Website Development

Back to Budgets

Marketing Supplies

Website Development

Search:

Item Name	Date	Invoice Number	Attachment(s)	Amount	Supplier	Remaining Funds	Notes	Approval Status	Approve / Reject	Paid	Actions
October Development	10/12/2025	41	1	\$2,000.00		\$10,000.00	4 approved 1 at 30 days	Approved	Approved 2025-11-03 16:36:13	--	
November Development	11/02/2025	43	Form Entry 424.pdf	\$2,250.00		\$7,750.00	4 approved 1 at 30 days	Submit for approval	--	--	
				\$4,250.00		\$7,750.00					

Showing 1 to 2 of 2 entries

Click on the attachment’s entry for the desired budget item opening a modal with the attachment name. Click the attachment name and the attachment will automatically be downloaded to your personal device.

Understanding Budgets and Budget Items

The Active Budgets Table shows summary information regarding all active budgets on the Active Tab of the Budgets Page in the Finance Module. Closed and archived budgets utilize the same page, but they are housed separately on the Closed and Archived Tabs of the Budgets Page.

Within the budget table, account information fields are used as the column headers. The default columns are Account, Name, Most Recent Activity, Outstanding Items, Attachments, Pending Approvals, Total Budget, Amount Used, Amount Remaining, and Actions. However, any desired field can be created by an administrator.

How To: Add a Custom/Additional User Account Information Field

To add a user account information field, open the Account Fields Tab in the Site Settings Module from the Main Menu.

Site Settings

Company InfoAccess LevelsSecurityRegistrationEmail SettingsInactive AccountsPayment SettingsAccount FieldsTable DefaultsLogs

System User Account Information Fields

Field Label	Required?	Action
Username	No	Permissions
Email	No	Permissions
First Name	No	Permissions
Last Name	No	Permissions
User Photo	No	Permissions
Session Timeout	No	Permissions
Home Page	No	Permissions

Custom/Additional User Account Information Fields

Add a field

Order	Field Label	Required?	Action
≡ Drag Me	Employee ID	No	EditDelete
≡ Drag Me	Address 1	No	EditDelete
≡ Drag Me	Address 2	No	EditDelete
≡ Drag Me	Phone	No	EditDelete
≡ Drag Me	Supplier	No	EditDelete

Click the "Add a Field" clickable link above the Custom / Additional User Account Information Fields opening the Add Field Modal.

Add Field
X

Label *

Type *

Text

☐ Allow multiple values

☐ Required

☐ Sensitive field

Accounts Module Level	View Own	View Other	Edit Own	Edit Other
Admin	☒	☒	☒	☒
Supervisor	☒	☒	☒	☒
Employee	☒	☐	☒	☐
Observer	☒	☒	☐	☐
Logged out user	☒	☒	☒	☒

Save
Cancel

Input the label for the field.

Select the field type (text or email) from the dropdown menu.

Selecting the checkbox enables customization to "Allow multiple values," make the field "Required," or make it a "Sensitive Field."

Designating the field as a "Sensitive Field" allows an extra step in form security when integrating these fields within the Form module. The Form Designer must explicitly choose when they wish to use a sensitive field.

The Permissions Table determines who can view / edit their own and other user's fields. Selecting the checkbox gives the individual the specified permission. Deselecting the checkbox removed the permission.

Select the "Save" button and the custom field now shows in the table.

Use the Drag Me icon to drag and drop the field into your desired position of choice.

The Active Budgets Table can be customized on the Table Defaults Tab of the Site Settings Module.

How To: Edit the Finance Module Active Budgets Table

To edit the Active Budgets Table in the Finance Module, go to the Table Defaults Tab in the Site Settings Module.

Select "Finance: Active Budget" from the dropdown menu.

Table Defaults

Finance: Active Budgets

Finance: Active Budgets

Edit Columns

View Live Table

Preview (up to 5 rows shown)

Select the “Edit Columns” button, opening the Choose Columns Modal. The default column choices include: account, name, most recent activity, outstanding items, attachments, pending approvals, total budget, amount used, amount remaining, actions, description, system notes, username, email, first name, last name, phone, Address 1, and Address 2, employee ID and any customized account fields.

How To: Add a Custom/Additional User Account Information Field

To add a user account information field, open the Account Fields Tab in the Site Settings Module from the Main Menu.

Site Settings

Company Info

Access Levels

Security

Registration

Email Settings

Inactive Accounts

Payment Settings

Account Fields

Table Defaults

Logs

System User Account Information Fields

Field Label	Required?	Action
Username	No	Permissions
Email	No	Permissions
First Name	No	Permissions
Last Name	No	Permissions
User Photo	No	Permissions
Session Timeout	No	Permissions
Home Page	No	Permissions

Custom/Additional User Account Information Fields

Add a field

Order	Field Label	Required?	Action
≡ Drag Me	Employee ID	No	Edit Delete
≡ Drag Me	Address 1	No	Edit Delete
≡ Drag Me	Address 2	No	Edit Delete
≡ Drag Me	Phone	No	Edit Delete
≡ Drag Me	Supplier	No	Edit Delete

Click the "Add a Field" clickable link above the Custom / Additional User Account Information Fields opening the Add Field Modal.

Add Field
X

Label *

Type *
Text
▼

☐ Allow multiple values

☐ Required

☐ Sensitive field

Accounts Module Level	View Own	View Other	Edit Own	Edit Other
Admin	☒	☒	☒	☒
Supervisor	☒	☒	☒	☒
Employee	☒	☐	☒	☐
Observer	☒	☒	☐	☐
Logged out user	☒	☒	☒	☒

Save
Cancel

Input the label for the field.

Select the field type (text or email) from the dropdown menu.

Selecting the checkbox enables customization to "Allow multiple values," make the field "Required," or make it a "Sensitive Field."

Designating the field as a "Sensitive Field" allows an extra step in form security when integrating these fields within the Form module. The Form Designer must explicitly choose when they wish to use a sensitive field.

The Permissions Table determines who can view / edit their own and other user's fields. Selecting the checkbox gives the individual the specified permission. Deselecting the checkbox removed the permission.

Select the "Save" button and the custom field now shows in the table.

Use the Drag Me icon to drag and drop the field into your desired position of choice.

The bars icon allows the columns to be positioned in the order of your choosing.

Click "Cancel" to return to the Table Defaults Tab without making any changes.

Select the "Save" button to make the desired changes and return to the Table Defaults Tab. A preview of the first five rows of the table is shown. Select the "View Live Table" button to be directed to the live table in the Finance Module.

This would include any additional fields created as discussed above as well as other existing account fields.

Budgets

Add New Budget

ActiveClosedArchivedReportsSettings

Active Budgets

Search:

☐	Account	Name	Most Recent Activity	Outstanding Items	Attachments	Pending Approvals	Total Budget	Amount Used	Amount Remaining
☐	Claypool, Robert "KT"	Marketing Supplies	--	--	--	--	\$200.00	\$0.00	\$200.00
Actions									
☐	Orkus, Mitzi	Website Development	11/02/2025	--	2	1	\$12,000.00	\$4,250.00	\$7,750.00

Showing 1 to 2 of 2 entries

The “Add New Budget” button is available from any tab on the Budget Page.

Within the Finance Module, Account refers to the individual whose account is linked to the budget as its owner. If the account that created the budget is archived or deleted, it can impact the budget status depending on the budget settings selected.

A variety of icons are used to navigate the budget table and actions associated with it. They are explained in the Budget Icon Explanations Table Below.

Budget Icon Explanations	
Icon	Explanation
	This sort ascending and sort descending icons indicate that the column that is being used to sort the table. The stair step to the right of the arrow indicates if the information is ascending or descending (alphabetically or numerical value).
	The down and up arrow icon indicates that this column is currently not being used for sorting. Clicking this icon will result in the table being sorted by these entries, and the icon will change to the ascending icon shown above.
	This icon is present if the tabular information does not fit entirely on your screen. Selecting it will expand the information below the entry row so that all information for the entry can be visible at once.
	The eyeball icon is used to view a budget and opens the Budget Items Per Budget Table.

	The pencil icon is used to edit a budget and opens the Edit Budget Modal.
	The bell icon is used to Add a budget alert and opens the Add Alert Modal. This alert allows individuals or those with a specific certification role to receive notification what a budget fall below a specified percent or amount of funds remaining.
	The checkmark icon is used to edit approvers and opens the Edit Approvers Modal where individual accounts or certification roles are identified as an approver and notification settings for budget approval and / or rejection are established.
	The power icon is used to close an active budget.
	The file box icon is used to archive a budget that is active or closed.
	The restore icon is used to open a budget that has been closed or archived.
	The trash can icon is used to delete a budget. To delete a budget, it must first be archived.

When an individual elects to view a budget, it opens the Budget Items Per Budget Table which shows detailed information about each individual budget item. Like the active budget table, this is also customizable. Account Information fields are used as the column headers. The default columns are Item Name, Date, Invoice Number, Attachment (s), Amount, Remaining Funds, Notes, Approval Status, Approve/Reject, Paid, and Actions. However, any desired field can be created by an administrator.

How To: Add a Custom/Additional User Account Information Field

To add a user account information field, open the Account Fields Tab in the Site Settings Module from the Main Menu.

Site Settings

Company Info

Access Levels

Security

Registration

Email Settings

Inactive Accounts

Payment Settings

Account Fields

Table Defaults

Logs

System User Account Information Fields

Field Label	Required?	Action
Username	No	Permissions
Email	No	Permissions
First Name	No	Permissions
Last Name	No	Permissions
User Photo	No	Permissions
Session Timeout	No	Permissions
Home Page	No	Permissions

Custom/Additional User Account Information Fields

Add a field

Order	Field Label	Required?	Action
≡ Drag Me	Employee ID	No	Edit Delete
≡ Drag Me	Address 1	No	Edit Delete
≡ Drag Me	Address 2	No	Edit Delete
≡ Drag Me	Phone	No	Edit Delete
≡ Drag Me	Supplier	No	Edit Delete

Click the "Add a Field" clickable link above the Custom / Additional User Account Information Fields opening the Add Field Modal.

Add Field

X

Label *

Type *

Text

Allow multiple values

Required

Sensitive field

Accounts Module Level	View Own	View Other	Edit Own	Edit Other
Admin	☒	☒	☒	☒
Supervisor	☒	☒	☒	☒
Employee	☒	☐	☒	☐
Observer	☒	☒	☐	☐
Logged out user	☒	☒	☒	☒

Save

Cancel

Input the label for the field.

Select the field type (text or email) from the dropdown menu.

Selecting the checkbox enables customization to "Allow multiple values," make the field "Required," or make it a "Sensitive Field."

Designating the field as a "Sensitive Field" allows an extra step in form security when integrating these fields within the Form module. The Form Designer must explicitly

choose when they wish to use a sensitive field.

The Permissions Table determines who can view / edit their own and other user's fields. Selecting the checkbox gives the individual the specified permission. Deselecting the checkbox removed the permission.

Select the "Save" button and the custom field now shows in the table.

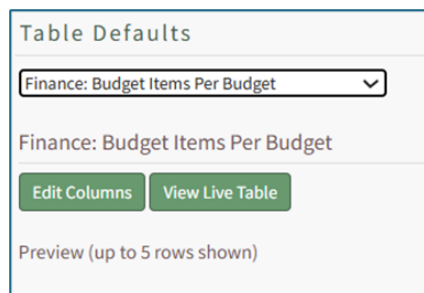
Use the Drag Me icon to drag and drop the field into your desired position of choice.

The Active Budgets Table can be customized on the Table Defaults Tab of the Site Settings Module.

How To: Edit the Finance Module Budget Items Per Budget Table

To edit the Budget Items per Budget Table in the Finance Module, go to the Table Defaults Tab in the Site Settings Module.

Select "Finance: Budget Items Per Budget" from the dropdown menu.

A screenshot of a web interface titled "Table Defaults". It features a dropdown menu with "Finance: Budget Items Per Budget" selected. Below the dropdown, the text "Finance: Budget Items Per Budget" is displayed. Underneath, there are two green buttons: "Edit Columns" and "View Live Table". At the bottom, it says "Preview (up to 5 rows shown)".

Select the "Edit Columns" button, opening the Choose Columns Modal. The default column choices include: item name, date, invoice number, attachment(s), amount, remaining funds, notes, approval status, approve / reject, paid, actions, username, email, first name, last name, employee ID, phone, Address 1 and Address 2 and any customized account fields.

How To: Add a Custom / Additional User Account Information Field

To add a user account information field, open the Account Fields Tab in the Site Settings Module from the Main Menu.

Site Settings

Company Info

Access Levels

Security

Registration

Email Settings

Inactive Accounts

Payment Settings

Account Fields

Table Defaults

Logs

System User Account Information Fields

Field Label	Required?	Action
Username	No	Permissions
Email	No	Permissions
First Name	No	Permissions
Last Name	No	Permissions
User Photo	No	Permissions
Session Timeout	No	Permissions
Home Page	No	Permissions

Custom/Additional User Account Information Fields

Add a field

Order	Field Label	Required?	Action
≡ Drag Me	Employee ID	No	Edit Delete
≡ Drag Me	Address 1	No	Edit Delete
≡ Drag Me	Address 2	No	Edit Delete
≡ Drag Me	Phone	No	Edit Delete
≡ Drag Me	Supplier	No	Edit Delete

Click the "Add a Field" clickable link above the Custom / Additional User Account Information Fields opening the Add Field Modal.

Add FieldX

Label *

Type *

Text

☐ Allow multiple values

☐ Required

☐ Sensitive field

Accounts Module Level	View Own	View Other	Edit Own	Edit Other
Admin	☒	☒	☒	☒
Supervisor	☒	☒	☒	☒
Employee	☒	☐	☒	☐
Observer	☒	☒	☐	☐
Logged out user	☒	☒	☒	☒

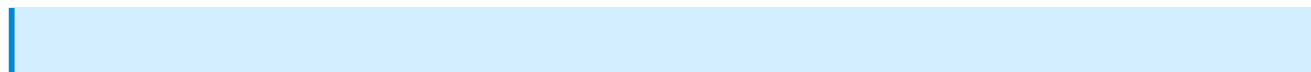
Save

Cancel

Input the label for the field.

Select the field type (text or email) from the dropdown menu.

Selecting the checkbox enables customization to "Allow multiple values," make the field "Required," or make it a "Sensitive Field."



Designating the field as a "Sensitive Field" allows an extra step in form security when integrating these fields within the Form module. The Form Designer must explicitly choose when they wish to use a sensitive field.

The Permissions Table determines who can view / edit their own and other user's fields. Selecting the checkbox gives the individual the specified permission. Deselecting the checkbox removed the permission.

Select the "Save" button and the custom field now shows in the table.

Use the Drag Me icon to drag and drop the field into your desired position of choice.

The bars icon allows the columns to be positioned in the order of your choosing.

Click "Cancel" to return to the Table Defaults Tab without making any changes.

Select the "Save" button to make the desired changes and return to the Table Defaults Tab. A preview of the first five rows of the table is shown. Select the "View Live Table" button to be directed to the live table in the Finance Module.

This would include any additional fields created as discussed above as well as other existing account fields.

When viewing a specific budget, the "Add Budget Item" button is available to the right of the page header.

How To: Add a Budget Item

To add a budget item to a specific budget, go to the Active Tab of the Budgets Page in the Finance Module. Open the specific budget either by clicking the name of the budget or the eyeball icon in the action column of the desired budget.

Budgets

Add New Budget

Finance > Budgets > Active

Active

Closed

Archived

Reports

Settings

Active Budgets

Search:

☐	Account	Name	Most Recent Activity	Outstanding Items	Attachments	Pending Approvals	Total Budget	Amount Used	Amount Remaining	Actions
☐	Orkus, Mitzi	Marketing Supplies	--	--	--	--	\$200.00	\$0.00	\$200.00	     
☐	Orkus, Mitzi	Website Development	11/02/2025	--	2	1	\$12,000.00	\$4,250.00	\$7,750.00	     

The icon opens the specific budget, showing the Budget Item Per Budget Table.

Marketing Supplies Budget for Mitzi Orkus: \$200.00

Add Budget Item

Finance > Budgets > Active > Mitzi Orkus > Marketing Supplie

Back to Budgets

Marketing Supplies

Website Development



tracking marketing department expenses

Search:

Item Name	Date	Invoice Number	Attachment(s)	Amount	Supplier	Remaining Funds	Notes	Approval Status	Paid	Actions
No data available in table										
				\$0.00		\$200.00				

Showing 0 to 0 of 0 entries

Select the “Add Budget Item” button to the right of the budget header opening the Add Budget Item Modal.

Add Budget Item

X

Budget Item Name *

Date *

Invoice Number *

Amount *

Attachment(s) *

Notes

Drop files here or click to upload

Add Budget Item

Cancel

Include the Budget Item Name and the Date. Include the invoice number, amount, and associated attachments. Multiple attachments can be included, but at least one is required. All fields, with the exception of notes, are required by the modal.

Select “Add Budget Item” from the bottom of the modal, and the budget item will now appear in the budget specific Budget Item Per Budget Table and can be submitted for approval (if approval is enabled).

Marketing Supplies Budget for Mitzi Orkus: \$200.00
Add Budget Item

Finance > Budgets > Active > Mitzi Orkus > Marketing Suppl

Back to Budgets

Marketing Supplies
Website Development

tracking marketing department expenses

Search:

Item Name	Date	Invoice Number	Attachment(s)	Amount	Supplier	Remaining Funds	Notes	Approval Status	Approve / Reject	Paid	Actions
Business Cards	11/03/2025	126	1	\$37.85		\$162.15	Proposed invoice for business cards, pending approval	<i></i> Submit for approval	--	--	<i></i> <i></i> <i></i> <i></i> <i></i>
				\$37.85		\$162.15					

Showing 1 to 1 of 1 entries

How To: Submit a Budget Item for Approval

Budget items can only be submitted for active budgets. To submit a budget item for approval, go to the Active Tab of the Budgets Page in the Finance Module. Open the specific budget with the budget item that needs to be submitted for approval either by clicking the name of the budget or the eyeball icon in the action column of the desired budget.

Budgets
Add New Budget

Finance > Budgets >

Active
Closed
Archived
Reports
Settings

Active Budgets

Search:

☐	Account	Name	Most Recent Activity	Outstanding Items	Attachments	Pending Approvals	Total Budget	Amount Used	Amount Remaining	Actions
☐	Orkus, Mitzi	Marketing Supplies	11/03/2025	--	1	--	\$200.00	\$37.85	\$162.15	<i></i> <i></i> <i></i> <i></i> <i></i>
☐	Orkus, Mitzi	Website Development	11/02/2025	--	2	1	\$12,000.00	\$4,250.00	\$7,750.00	<i></i> <i></i> <i></i> <i></i> <i></i>

Showing 1 to 2 of 2 entries

This opens the budget, showing the Budget Item per Budget Table.

Marketing Supplies Budget for Mitzi Orkus: \$200.00
Add Budget Item

Finance > Budgets > Active > Mitzi Orkus > Marketing Su

Back to Budgets

Marketing Supplies
Website Development

tracking marketing department expenses

Search:

Item Name	Date	Invoice Number	Attachment(s)	Amount	Supplier	Remaining Funds	Notes	Approval Status	Approve / Reject	Paid	Actions
Business Cards	11/03/2025	126	1	\$37.85		\$162.15	Proposed invoice for business cards, pending approval	<i></i> Submit for approval	--	--	<i></i> <i></i> <i></i> <i></i> <i></i>
				\$37.85		\$162.15					

Showing 1 to 1 of 1 entries

To submit the budget item for approval, select the clickable link “Submit for Approval” in the Approval Status column.

Approval Status	↑↓	Approve /	↑↓	Paid	↑↓	Actions
0 of 2						Submitted

The approval status now shows how many of the required approvals have been granted. The comment icon shows the date and time the budget item was submitted for approval.

Website Development Budget for Mitzi Orkus: \$12,000.00

Finance > Budgets > Active > Mitzi Orkus > Website Development

Add Budget Item

Back to Budgets

Website Development

Search:

Item Name	Date	Invoice Number	Attachment(s)	Amount	Remaining Funds	Notes	Approval Status	Approve / Reject
October Development	10/12/2025	41	1	\$2,000.00	\$10,000.00	4 approved 1 at 30 days	0 of 1	✓ Approve ✗ Reject
November Development	11/02/2025	43	1	\$2,250.00	\$7,750.00	4 approved 1 at 30 days	Submit for approval	--
				\$4,250.00	\$7,750.00			

Showing 1 to 2 of 2 entries

Each budget will show as an individual tab allowing for more efficient access. The clickable link “Back to Budgets” will take an individual to the Active Tab of the Budgets Page. Action icons show above a filter that allows an individual to search for specific budget items within a singular budget.

Marketing Supplies Budget for

Back to Budgets

Marketing Supplies

Website Development

Search:

Understanding Budget Item Approval and Approval Notifications

Budget items do not require approval by default. There is an ability to customize approvals. Approvers can be individuals or certification roles, and can be required or optional. If a certification role is required to approve a budget item, approval can be granted if one individual with the certification role approves the item or all can be required to approve the item as well.

There are two checkboxes associated with adding an approver, although neither is required. The first is in regards to when approval will be given. The “Only allow approval when all above required groups have been given approval” checkbox will not mark a budget item as approved until all required groups have approved the item.

The second checkbox impacts when alerts regarding a budget will be sent. The “Send alerts to all approvers in this group when their approval is required for a budget item” opens an additional checkbox when selected. Select the “Only send an alert to this group when all above required groups have been given approval” if you want the alert set after all required signatures have been received.

There are five options of who the system should notify when a budget has received all required approvals or when it has been rejected: the user who submitted the budget item, the users who have approved the budget item, all users in all approval groups, the account holder, and the account holder’s supervisor(s). Multiple, all, or no checkboxes can be selected.

How To: Set / Edit a Budget's Approvers and Approval Notifications

You can only edit approvers and approval notifications for an active budget.

To set or edit a budget’s approvers and / or approval notifications, go to the Active Tab of the Budgets Page in the Finance Module. Select the check icon in the Actions column of the Active Accounts Table.

Add an individual account or a certification role and identify if their approval is required or optional. Multiple approvers can be added in this expansion, or you can click “+Add an Approver” again if the permissions/requirements need to be different for the different approvers.

There are two checkboxes associated with adding an approver. The first is in regard to when approval will be given. The “Only allow approval when all above required groups have been given approval” checkbox will not mark a budget item as approved until all required groups have been approved.

The second checkbox impacts when alerts regarding a budget will be sent. The “Send alerts to all approvers in this group when their approval is required for a budget item” opens an additional checkbox when selected. Select the “Only send an alert to this group when all above required groups have been given approval” to send an alert when a required signatures have been received.

After making the appropriate selections, the modal will state how many budget items will be affected by the changes being made.

Budget items that will become fully approved when this form is saved

0 budget item(s) will be affected.

- ☒ Mark as "Approved" any budget items that will become fully approved when this form is saved
- ☐ Clear existing approvals for any budget items that will become fully approved when this form is saved

You have the choice to “Mark as Approved any budget items that will become fully approved when this form is saved” or to “Clear existing approvals for any budget items that will become fully approved when this form is saved.” You cannot select both.

Once all changes to approvers and approval notifications for the budget have been made, select the “Save” button and you will return to the Active Tab of the Budgets Page.

How To: Submit a Budget Item for Approval

Budget items can only be submitted for active budgets. To submit a budget item for approval, go to the Active Tab of the Budgets Page in the Finance Module. Open the specific budget with the budget item that needs to be submitted for approval either by clicking the name of the budget or the eyeball icon in the action column of the desired budget.

Budgets

Add New Budget

Finance > Budgets > Active

Active

Closed

Archived

Reports

Settings

Active Budgets

Search:

☐	Account	Name	Most Recent Activity	Outstanding Items	Attachments	Pending Approvals	Total Budget	Amount Used	Amount Remaining	Actions
☐	Orkus, Mitzi	Marketing Supplies	11/03/2025	--	1	--	\$200.00	\$37.85	\$162.15	
☐	Orkus, Mitzi	Website Development	11/02/2025	--	2	1	\$12,000.00	\$4,250.00	\$7,750.00	

Showing 1 to 2 of 2 entries

This opens the budget, showing the Budget Item per Budget Table.

Marketing Supplies Budget for Mitzi Orkus: \$200.00

Add Budget Item

Finance > Budgets > Active > Mitzi Orkus > Marketing Supplies

Back to Budgets

Marketing Supplies

Website Development

tracking marketing department expenses

Search:

Item Name	Date	Invoice Number	Attachment(s)	Amount	Supplier	Remaining Funds	Notes	Approval Status	Approve / Reject	Paid	Actions
Business Cards	11/03/2025	126	1	\$37.85		\$162.15	Proposed invoice for business cards, pending approval	Submit for approval	--	--	
				\$37.85		\$162.15					

Showing 1 to 1 of 1 entries

To submit the budget item for approval, select the clickable link “Submit for Approval” in the Approval Status column.

Approval Status	Approve /	Paid	Actions
0 of 2	Mitzi Orkus Nov 3, 2025 at 4:19pm	Submitted	

The approval status now shows how many of the required approvals have been granted. The comment icon shows the date and time the budget item was submitted for approval.

How To: Unlock a Submitted Budget Item for Editing

In order to edit an approved budget item, any existing approvals and rejections regarding the budget item will be cancelled. The budget item must then be unlocked before editing is possible.

To unlock a submitted budget item for editing, select the appropriate budget from the Active/Closed/Archived Budget tab. Click the budget title to be taken to the Budget Item Per

Budget Table.

Tournament Budget Budget for Alfa TestAccount: \$10,000.00

Add Budget Item

Finance > Budgets > Active > Alfa TestAccount > Tournament Budget

Back to Budgets

Tournament Budget

This is a fake budget for a 2023 Sports Tournament.

Search:

Item Name	Date	Invoice Number	Attachment(s)	Amount	Remaining Funds	Notes	Approval Status	Paid	Actions
Advertising Pamphlets	10/10/2022	1	1	\$1,000.00	\$9,000.00	--	Approved	--	
Catering Order	10/11/2022	2	1	\$5,500.00	\$3,500.00	--	0 of 3	--	
Referee Payment	10/12/2022	3	1	\$1,000.00	\$2,500.00	--	Submit for approval	--	
				\$7,500.00	\$2,500.00				

Click the lock icon in the actions column of the budget item you wish to edit.

The lock icon opens a Confirmation Modal which states, “Locked for editing. Would you like to cancel approvals and rejection and unlock editing?”

live.kastrack.com says

Locked for editing. Would you like to cancel approvals and rejections and unlock editing?

OK

Cancel

Select OK.

The lock icon is now replaced with the pencil icon in the actions column and the budget item is unlocked.

Item Name	Date	Invoice Number	Attachment(s)	Amount	Remaining Funds	Notes	Approval Status	Paid	Actions
Advertising Pamphlets	10/10/2022	1	1	\$1,000.00	\$9,000.00	--	Submit for approval	--	

The pencil icon opens the Edit Budget Item Modal if clicked.

How To: Edit a Budget Item

Only active budgets can be edited. To edit a budget, go to the Active Tab of the Budgets Page in the Finance Module. Click the pencil icon in the Actions column of the Active Table.

Budgets

Add New Budget

Finance > Budgets > Active

Active

Closed

Archived

Reports

Settings

Active Budgets

Search:

☐	Account	Name	Most Recent Activity	Outstanding Items	Attachments	Pending Approvals	Total Budget	Amount Used	Amount Remaining	Actions
☐	Orkus, Mitzi	Marketing Supplies	--	--	--	--	\$200.00	\$0.00	\$200.00	
☐	Orkus, Mitzi	Website Development	11/02/2025	--	2	1	\$12,000.00	\$4,250.00	\$7,750.00	

This opens the Edit (BUDGET NAME) Modal.

Edit: Marketing Supplies

Budget Name *

Marketing Supplies

Description

tracking marketing department expenses

Account *

Search for an account

Account

✖ Mitzi Orkus

Amount *

200.00

Tags

MMQ/RDC

Save

Cancel

Make any desired changes to the Budget Name, Description, Account, Amount, or Tags associated with the budget.

When done making changes, click the “Save” button and return to the Active Tab of the Budgets Page.

Edit: Advertising Pamphlets

Budget Item Name *

Advertising Pamphlets

Date *

2022-10-10 00:00:00

Invoice Number *

1

Amount *

1000.00

Attachment(s) *

Drop files here or click to upload

✖ A.pdf (6.3 KB)

Notes

If the following items are not listed on the attached invoice, please include them here: Tail number, Aircraft Make/Model, Liberty Course Code, Lesson #, Student's LU ID

Save

Cancel

How To: Resubmit a Budget Item for Approval after Edits Are Made

A Budget Item must be unlocked for edits to be made.

How To: Unlock a Submitted Budget Item for Editing

In order to edit an approved budget item, any existing approvals and rejections regarding the budget item will be cancelled. The budget item must then be unlocked before editing is possible.

To unlock a submitted budget item for editing, select the appropriate budget from the Active/Closed/Archived Budget tab. Click the budget title to be taken to the Budget Item Per Budget Table.

Tournament Budget Budget for Alfa TestAccount: \$10,000.00

Add Budget Item

Finance > Budgets > Active > Alfa TestAccount > Tournament E

Back to Budgets

Tournament Budget

This is a fake budget for a 2023 Sports Tournament.

Search:

Item Name	Date	Invoice Number	Attachment(s)	Amount	Remaining Funds	Notes	Approval Status	Paid	Actions
Advertising Pamphlets	10/10/2022	1	1	\$1,000.00	\$9,000.00	--	Approved	--	
Catering Order	10/11/2022	2	1	\$5,500.00	\$3,500.00	--	0 of 3	--	
Referee Payment	10/12/2022	3	1	\$1,000.00	\$2,500.00	--	Submit for approval	--	
				\$7,500.00	\$2,500.00				

Click the lock icon in the actions column of the budget item you wish to edit.

The lock icon opens a Confirmation Modal which states, “Locked for editing. Would you like to cancel approvals and rejection and unlock editing?”

live.kastrack.com says

Locked for editing. Would you like to cancel approvals and rejections and unlock editing?

OK

Cancel

Select OK.

The lock icon is now replaced with the pencil icon in the actions column and the budget item is unlocked.

Item Name	Date	Invoice Number	Attachment(s)	Amount	Remaining Funds	Notes	Approval Status	Paid	Action
Advertising Pamphlets	10/10/2022	1	1	\$1,000.00	\$9,000.00	--	Submit for approval	--	

The pencil icon opens the Edit Budget Item Modal if clicked.

How To: Edit a Budget Item

Only active budgets can be edited. To edit a budget, go to the Active Tab of the Budgets Page in the Finance Module. Click the pencil icon in the Actions column of the Active Table.

Budgets

Add New Budget

Finance > Budgets

ActiveClosedArchivedReportsSettings

Active Budgets

Search:

☐	Account	Name	Most Recent Activity	Outstanding Items	Attachments	Pending Approvals	Total Budget	Amount Used	Amount Remaining	Actions
☐	Orkus, Mitzi	Marketing Supplies	--	--	--	--	\$200.00	\$0.00	\$200.00	     
☐	Orkus, Mitzi	Website Development	11/02/2025	--	2	1	\$12,000.00	\$4,250.00	\$7,750.00	     

This opens the Edit (BUDGET NAME) Modal.

Edit: Marketing Supplies

X

Budget Name *

Marketing Supplies

Description

tracking marketing department expenses

Account *

Search for an account

Account

Mitzi Orkus

Amount *

200.00

Tags

MMO/RDC

Save

Cancel

Make any desired changes to the Budget Name, Description, Account, Amount, or Tags associated with the budget.

When done making changes, click the “Save” button and return to the Active Tab of the Budgets Page.

[Finance > Budgets > Active > Alfa TestAccount > Tournament Budget](#)

Tournament Budget Budget for Alfa TestAccount: \$10,000.00 Add Budget Item

[Back to Budgets](#)

Tournament Budget

This is a fake budget for a 2023 Sports Tournament.

Search:

Item Name ↑↓	Date ↓↑	Invoice Number ↑↓	Attachment(s) ↑↓	Amount ↑↓	Remaining Funds ↑↓	Notes ↑↓	Approval Status ↑↓	Paid ↑↓	Actions ↑↓
Advertising Pamphlets	10/10/2022	1	1	\$1,000.00	\$9,000.00	--	Approved	--	
Catering Order	10/11/2022	2	1	\$5,500.00	\$3,500.00	--	0 of 3	--	
Referee Payment	10/12/2022	3	1	\$1,000.00	\$2,500.00	--	Submit for approval	--	
				\$7,500.00	\$2,500.00				

Unlocking the budget item allows the pencil icon to be selected for edits to the budget.

How To: Edit a Budget Item After Submission for Approval

Go to the Active/Closed/Archived Budget Table and click the title of the budget you wish to edit, opening the Budget Item Per Budget Table.

If the budget item has already been submitted for approval, it must be unlocked first before edits can be made.

Tournament Budget

Search:

Item Name	Date	Invoice Number	Attachment(s)	Amount	Remaining Funds	Notes	Approval Status	Paid	Actions
Advertising Pamphlets	10/10/2022	1	1	\$1,000.00	\$9,000.00	--	Approved	--	
Catering Order	10/11/2022	2	1	\$5,500.00	\$3,500.00	--	0 of 3	--	
Referee Payment	10/12/2022	3	1	\$1,000.00	\$2,500.00	--	Submit for approval	--	
				\$7,500.00	\$2,500.00				

Unlock the approved budget item.

How To: Unlock a Submitted Budget Item for Editing

In order to edit an approved budget item, any existing approvals and rejections regarding the budget item will be cancelled. The budget item must then be unlocked before editing is possible.

To unlock a submitted budget item for editing, select the appropriate budget from the Active/Closed/Archived Budget tab. Click the budget title to be taken to the Budget Item Per Budget Table.

Tournament Budget

Search:

Item Name	Date	Invoice Number	Attachment(s)	Amount	Remaining Funds	Notes	Approval Status	Paid	Actions
Advertising Pamphlets	10/10/2022	1	1	\$1,000.00	\$9,000.00	--	Approved	--	
Catering Order	10/11/2022	2	1	\$5,500.00	\$3,500.00	--	0 of 3	--	
Referee Payment	10/12/2022	3	1	\$1,000.00	\$2,500.00	--	Submit for approval	--	
				\$7,500.00	\$2,500.00				

Click the lock icon in the actions column of the budget item you wish to edit.

The lock icon opens a Confirmation Modal which states, “Locked for editing. Would you like to cancel approvals and rejection and unlock editing?”

live.kastrack.com says

Locked for editing. Would you like to cancel approvals and rejections and unlock editing?

OK

Cancel

Select OK.

The lock icon is now replaced with the pencil icon in the actions column and the budget item is unlocked.

Item Name	Date	Invoice Number	Attachment(s)	Amount	Remaining Funds	Notes	Approval Status	Paid	Act
Advertising Pamphlets	10/10/2022	1	1	\$1,000.00	\$9,000.00	--	Submit for approval	--	

The pencil icon opens the Edit Budget Item Modal if clicked.

How To: Edit a Budget Item

{{@308}}

Edit: Advertising Pamphlets

Budget Item Name *

Advertising Pamphlets

Date *

2022-10-10 00:00:00

Invoice Number *

1

Amount *

1000.00

Attachment(s) *

Drop files here or click to upload

x A.pdf (6.3 KB)

Notes

If the following items are not listed on the attached invoice, please include them here: Tail number, Aircraft Make/Model, Liberty Course Code, Lesson #, Student's LU ID

Save

Cancel

The lock icon is now replaced with the pencil icon in the actions column, and the budget item is unlocked.

Item Name	Date	Invoice Number	Attachment(s)	Amount	Remaining Funds	Notes	Approval Status	Paid	Action
Advertising Pamphlets	10/10/2022	1	1	\$1,000.00	\$9,000.00	--	Submit for approval	--	

The pencil icon opens the Edit Budget Item Modal if clicked.

Edit: Advertising Pamphlets
X

Budget Item Name *

Advertising Pamphlets

Date *

2022-10-10 00:00:00

Invoice Number *

1

Amount *

1000.00

Attachment(s) *

Drop files here or click to upload

x

A.pdf (6.3 KB)

Notes

If the following items are not listed on the attached invoice, please include them here: Tail number, Aircraft Make/Model, Liberty Course Code, Lesson #, Student's LU ID

Save

Cancel

Make the necessary changes and select Save for your edits to be recorded.

You must resubmit your budget items for approval.

How To: Resubmit a Budget Item for Approval after Edits Are Made

A Budget Item must be unlocked for edits to be made.

How To: Unlock a Submitted Budget Item for Editing

{{@314}}

Tournament Budget Budget for Alfa TestAccount: \$10,000.00

Add Budget Item

Finance > Budgets > Active > Alfa TestAccount > Tournament Budget

Back to Budgets

Tournament Budget

This is a fake budget for a 2023 Sports Tournament.

Search:

Item Name	Date	Invoice Number	Attachment(s)	Amount	Remaining Funds	Notes	Approval Status	Paid	Actions
Advertising Pamphlets	10/10/2022	1	1	\$1,000.00	\$9,000.00	--	Approved	--	
Catering Order	10/11/2022	2	1	\$5,500.00	\$3,500.00	--	0 of 3	--	
Referee Payment	10/12/2022	3	1	\$1,000.00	\$2,500.00	--	Submit for approval	--	
				\$7,500.00	\$2,500.00				

Unlocking the budget item allows the pencil icon to be selected for edits to the budget.

How To: Edit a Budget Item After Submission for Approval

{{@316}}

Item Name	Date	Invoice Number	Attachment(s)	Amount	Remaining Funds	Notes	Approval Status	Paid	Act
Advertising Pamphlets	10/10/2022	1	1	\$1,000.00	\$9,000.00	--	Submit for approval	--	

Once edits have been made, the budget item should be resubmitted for approval. Click the “Submit for approval” link in the Approval Status column.

The Approval Status changes, now showing how many approvals have been received and the total needed. The budget item is locked again.

Item Name	Date	Invoice Number	Attachment(s)	Amount	Remaining Funds	Notes	Approval Status	Paid	Act
Advertising Pamphlets	10/10/2022	1	1	\$1,000.00	\$9,000.00	--	0 of 3	--	

Item Name	Date	Invoice Number	Attachment(s)	Amount	Remaining Funds	Notes	Approval Status	Paid	Actions
Advertising Pamphlets	10/10/2022	1	1	\$1,000.00	\$9,000.00	--	Submit for approval	--	

Once edits have been made, the budget item should be resubmitted for approval. Click the “Submit for approval” link in the Approval Status column.

The Approval Status changes, now showing how many approvals have been received and the total needed. The budget item is locked again.

Item Name	Date	Invoice Number	Attachment(s)	Amount	Remaining Funds	Notes	Approval Status	Paid	Actions
Advertising Pamphlets	10/10/2022	1	1	\$1,000.00	\$9,000.00	--	0 of 3	--	

Understanding Budget Alerts

Any budget can have customized alerts that notify individuals or certification roles when the amount or percentage remaining of a budget falls below a specified threshold.

How To: Add a Budget Alert

Budget alerts can only be added to active budgets. To add a budget alert, locate the budget you wish to add an alert to on the Active Tab of the Budgets Page. Click the bell icon in the Actions column of the budget table.

Budgets

Add New Budget

Finance > Budgets > Active

ActiveClosedArchivedReportsSettings

Active Budgets

Search:

	Account	Name	Most Recent Activity	Outstanding Items	Attachments	Pending Approvals	Total Budget	Amount Used	Amount Remaining	Actions
☐	Orkus, Mitzi	Marketing Supplies	--	--	--	--	\$200.00	\$0.00	\$200.00	
☐	Orkus, Mitzi	Website Development	11/02/2025	--	2	1	\$12,000.00	\$4,250.00	\$7,750.00	

☑This opens the Edit Alerts Modal.

Edit Alerts: Marketing Supplies

Add An Alert

SaveCancel

Select the “Add an Alert” button and the modal expands.

Edit Alerts: Marketing Supplies

Amount remaining falls below ▼AmountAccount or Role

Amount remaining falls below

Percent remaining falls below

SaveCancel

An alert can be based on when the amount remaining in the budget falls below a specified amount or when the amount remaining in the budget falls below a specified percent.

Input the percentage or amount for the alert threshold as well as the individual account or certification role to receive the alert. Multiple accounts and / or roles can be selected to receive the alert.

Select the “Save” button and return to the Active Tab of the Budgets Page.

Additional alerts can be added if desired. Existing alerts will show on the Edit Alert Modal.

Edit Alerts: Marketing SuppliesX

Percent remaining falls below ▼10.00

Account or Role

✖ Mitzi Orkus

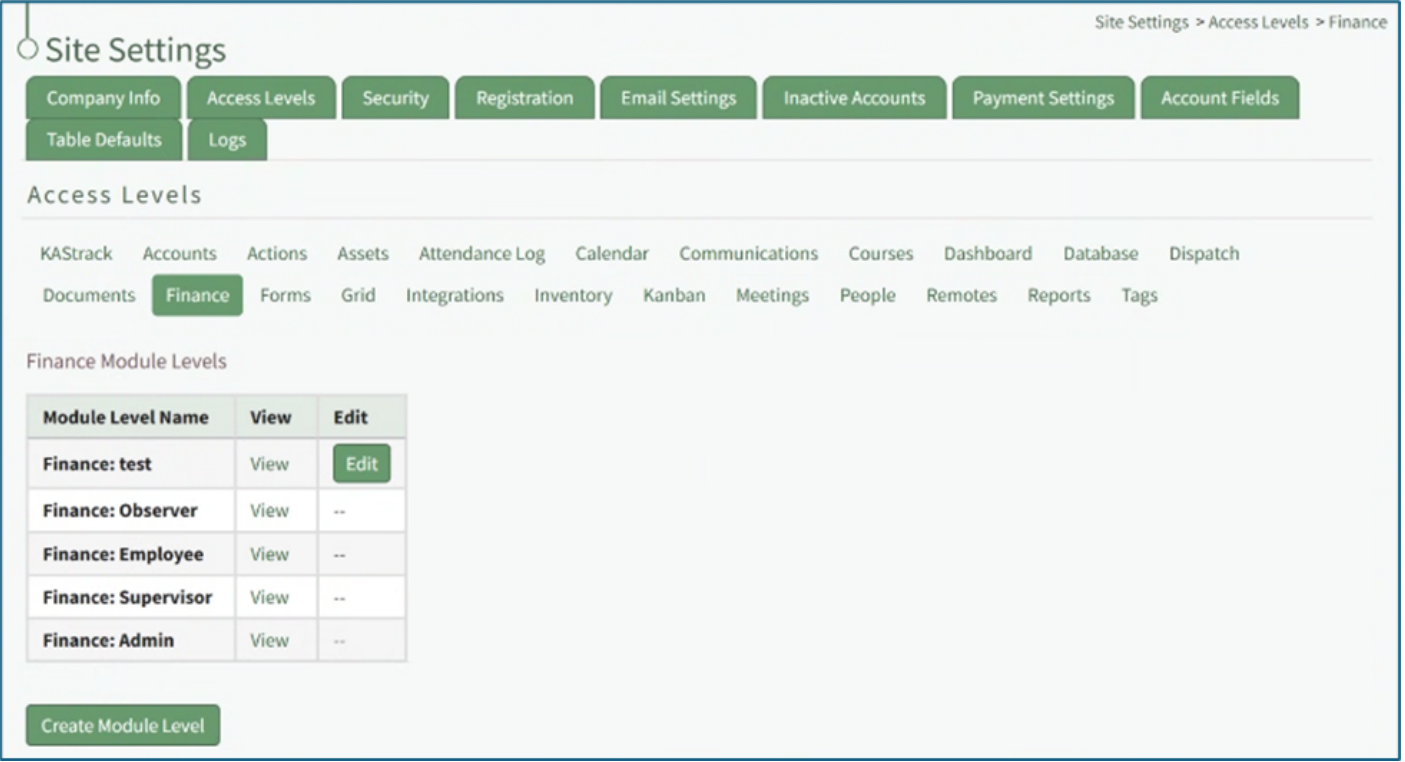
Add An Alert

Save

Cancel

Finance Module: Module Level Permissions

The default permissions that are granted to each module level in the Finance Module are managed through the Access Levels Tab of the Site Settings Module.



There are four base Module Levels with default permissions in the Finance Module that cannot be altered by the user:

Finance Module - Module Level Permissions Table	
Module Level	Permissions

Admin	Can access active budgets, Can access closed budgets, Can access archived budgets, Can view accessible budgets assigned to me, Can view accessible budgets of supervised users, Can view accessible budgets of all users, Can submit budget items for approval for budgets assigned to me, Can submit budget items for approval for budgets of my supervised users, Can submit budget items for approval for all budgets, Can edit existing budget items for viewable budgets (including the notes field), Can edit existing budget item notes field, Can create and delete budget items for viewable budgets, Can edit budgets, Can create and delete budgets, Can mark budgets paid, Can archive and un-archive budgets, Can close and open budgets
Supervisors	Can access active budgets, Can access closed budgets, Can access archived budgets, Can view accessible budgets assigned to me, Can view accessible budgets of supervised users, Can submit budget items for approval for budgets of my supervised users, Can edit existing budget items for viewable budgets (including the notes field), Can edit existing budget item notes field, Can create and delete budget items for viewable budgets, Can archive and un-archive budgets, Can close and open budgets
Employees	Can access active budgets, Can access closed budgets, Can access archived budgets, Can view accessible budgets assigned to me
Observer	Can access active budgets, Can access closed budgets, Can access archived budgets, Can view accessible budgets of all users

Customized Module Levels can be created.

How To: Create a New Module Level (Finance Module)

To access an attachment associated with a specific budget item, go to the Active Tab of the Budgets Page in the Finance Module.

Attachments can also be accessed for Closed or Archived Budgets on the appropriate tabs.

Budgets

Add New Budget

Finance > Budgets > Active

Active

Closed

Archived

Reports

Settings

Active Budgets

Search:

☐	Account	Name	Most Recent Activity	Outstanding Items	Attachments	Pending Approvals	Total Budget	Amount Used	Amount Remaining	Actions
☐	Orkus, Mitzi	Marketing Supplies	11/03/2025	--	1	--	\$200.00	\$37.85	\$162.15	
☐	Orkus, Mitzi	Website Development	11/02/2025	--	2		\$12,000.00	\$4,250.00	\$7,750.00	

Form Entry 422.pdf

Form Entry 424.pdf

Showing 1 to 2 of 2 entries

Clicking on the attachment file number in the attachments column opens the associated attachments file name as a clickable links that, if selected, will open the attached file for viewing.

You can also access your attachments by clicking on the budget name or the eyeball icon in the actions column of the Active Budgets Table which opens the Budget Items Per Budget Table.

Website Development Budget for Mitzi Orkus: \$12,000.00

Add Budget Item

Finance > Budgets > Active > Mitzi Orkus > Website Development

Back to Budgets

Marketing Supplies

Website Development

Search:

Item Name	Date	Invoice Number	Attachment(s)	Amount	Supplier	Remaining Funds	Notes	Approval Status	Approve / Reject	Paid	Actions
October Development	10/12/2025	41	1	\$2,000.00		\$10,000.00	4 approved 1 at 30 days	Approved	Approved 2025-11-03 16:36:13	--	
November Development	11/02/2025	43	2	\$2,250.00		\$7,750.00	4 approved 1 at 30 days	Submit for approval	--	--	
				\$4,250.00		\$7,750.00					

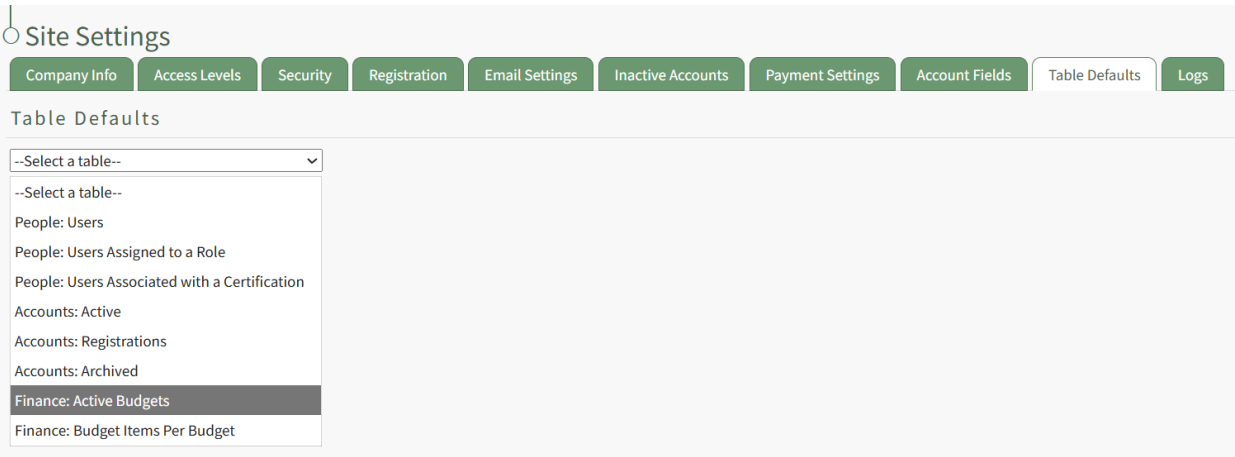
Form Entry 424.pdf

Showing 1 to 2 of 2 entries

Click on the attachment's entry for the desired budget item opening a modal with the attachment name. Click the attachment name and the attachment will automatically be downloaded to your personal device.

Customizable Tables in the Finance Module

There are two tables in the Finance Module than can be customized for your organization's specific needs.



The Active Budgets Table (on the Active Tab of the Budgets Page of the Finance Module), the Budget Items per Budget Table (on a specific budget's Details Page) are customizable.

How To: Edit the Finance Module Active Budgets Table

To edit the Active Budgets Table in the Finance Module, go to the Table Defaults Tab in the Site Settings Module.

Select “Finance: Active Budget” from the dropdown menu.

Table Defaults

Finance: Active Budgets

Finance: Active Budgets

Edit Columns View Live Table

Preview (up to 5 rows shown)

Select the “Edit Columns” button, opening the Choose Columns Modal. The default column choices include: account, name, most recent activity, outstanding items, attachments, pending

approvals, total budget, amount used, amount remaining, actions, description, system notes, username, email, first name, last name, phone, Address 1, and Address 2, employee ID and any customized account fields.

How To: Add a Custom/Additional User Account Information Field

To add a user account information field, open the Account Fields Tab in the Site Settings Module from the Main Menu.

Site Settings

Company Info

Access Levels

Security

Registration

Email Settings

Inactive Accounts

Payment Settings

Account Fields

Table Defaults

Logs

System User Account Information Fields

Field Label	Required?	Action
Username	No	Permissions
Email	No	Permissions
First Name	No	Permissions
Last Name	No	Permissions
User Photo	No	Permissions
Session Timeout	No	Permissions
Home Page	No	Permissions

Custom/Additional User Account Information Fields

Add a field

Order	Field Label	Required?	Action
≡ Drag Me	Employee ID	No	Edit Delete
≡ Drag Me	Address 1	No	Edit Delete
≡ Drag Me	Address 2	No	Edit Delete
≡ Drag Me	Phone	No	Edit Delete
≡ Drag Me	Supplier	No	Edit Delete

Click the "Add a Field" clickable link above the Custom / Additional User Account Information Fields opening the Add Field Modal.

Add Field

X

Label *

Type *

Text

Allow multiple values

Required

Sensitive field

Accounts Module Level	View Own	View Other	Edit Own	Edit Other
Admin	☒	☒	☒	☒
Supervisor	☒	☒	☒	☒
Employee	☒	☐	☒	☐
Observer	☒	☒	☐	☐
Logged out user	☒	☒	☒	☒

Save

Cancel

Input the label for the field.

Select the field type (text or email) from the dropdown menu.

Selecting the checkbox enables customization to "Allow multiple values," make the field "Required," or make it a "Sensitive Field."

Designating the field as a "Sensitive Field" allows an extra step in form security when integrating these fields within the Form module. The Form Designer must explicitly choose when they wish to use a sensitive field.

The Permissions Table determines who can view / edit their own and other user's fields. Selecting the checkbox gives the individual the specified permission. Deselecting the checkbox removed the permission.

Select the "Save" button and the custom field now shows in the table.

Use the Drag Me icon to drag and drop the field into your desired position of choice.

The bars icon allows the columns to be positioned in the order of your choosing.

Click "Cancel" to return to the Table Defaults Tab without making any changes.

Select the "Save" button to make the desired changes and return to the Table Defaults Tab. A preview of the first five rows of the table is shown. Select the "View Live Table" button to be directed to the live table in the Finance Module.

How To: Edit the Finance Module Budget Items Per Budget Table

To edit the Budget Items per Budget Table in the Finance Module, go to the Table Defaults Tab in the Site Settings Module.

Select "Finance: Budget Items Per Budget" from the dropdown menu.

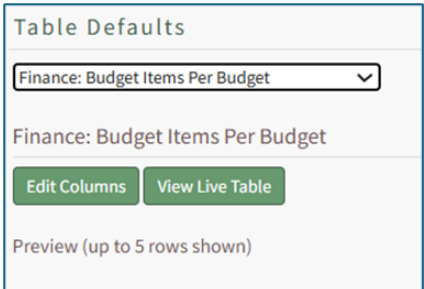


Table Defaults

Finance: Budget Items Per Budget ▼

Finance: Budget Items Per Budget

Edit Columns View Live Table

Preview (up to 5 rows shown)

Select the “Edit Columns” button, opening the Choose Columns Modal. The default column choices include: item name, date, invoice number, attachment(s), amount, remaining funds, notes, approval status, approve / reject, paid, actions, username, email, first name, last name, employee ID, phone, Address 1 and Address 2 and any customized account fields.

How To: Add a Custom / Additional User Account Information Field

To add a user account information field, open the Account Fields Tab in the Site Settings Module from the Main Menu.

Site Settings

Company Info

Access Levels

Security

Registration

Email Settings

Inactive Accounts

Payment Settings

Account Fields

Table Defaults

Logs

System User Account Information Fields

Field Label	Required?	Action
Username	No	Permissions
Email	No	Permissions
First Name	No	Permissions
Last Name	No	Permissions
User Photo	No	Permissions
Session Timeout	No	Permissions
Home Page	No	Permissions

Custom/Additional User Account Information Fields

Add a field

Order	Field Label	Required?	Action
≡ Drag Me	Employee ID	No	Edit Delete
≡ Drag Me	Address 1	No	Edit Delete
≡ Drag Me	Address 2	No	Edit Delete
≡ Drag Me	Phone	No	Edit Delete
≡ Drag Me	Supplier	No	Edit Delete

Click the "Add a Field" clickable link above the Custom / Additional User Account Information Fields opening the Add Field Modal.

Add Field
X

Label *

Type *
Text
▼

☐ Allow multiple values

☐ Required

☐ Sensitive field

Accounts Module Level	View Own	View Other	Edit Own	Edit Other
Admin	☒	☒	☒	☒
Supervisor	☒	☒	☒	☒
Employee	☒	☐	☒	☐
Observer	☒	☒	☐	☐
Logged out user	☒	☒	☒	☒

Save
Cancel

Input the label for the field.

Select the field type (text or email) from the dropdown menu.

Selecting the checkbox enables customization to "Allow multiple values," make the field "Required," or make it a "Sensitive Field."

Designating the field as a "Sensitive Field" allows an extra step in form security when integrating these fields within the Form module. The Form Designer must explicitly choose when they wish to use a sensitive field.

The Permissions Table determines who can view / edit their own and other user's fields. Selecting the checkbox gives the individual the specified permission. Deselecting the checkbox removed the permission.

Select the "Save" button and the custom field now shows in the table.

Use the Drag Me icon to drag and drop the field into your desired position of choice.

The bars icon allows the columns to be positioned in the order of your choosing.

Click "Cancel" to return to the Table Defaults Tab without making any changes.

Select the "Save" button to make the desired changes and return to the Table Defaults Tab. A preview of the first five rows of the table is shown. Select the "View Live Table" button to be directed to the live table in the Finance Module.

Customizable user account information fields can be created and utilized in the tables as needed.

How To: Add a Custom / Additional User Account Information Field

To add a user account information field, open the Account Fields Tab in the Site Settings Module from the Main Menu.

Site Settings

Company Info

Access Levels

Security

Registration

Email Settings

Inactive Accounts

Payment Settings

Account Fields

Table Defaults

Logs

System User Account Information Fields

Field Label	Required?	Action
Username	No	Permissions
Email	No	Permissions
First Name	No	Permissions
Last Name	No	Permissions
User Photo	No	Permissions
Session Timeout	No	Permissions
Home Page	No	Permissions

Custom/Additional User Account Information Fields

Add a field

Order	Field Label	Required?	Action
≡ Drag Me	Employee ID	No	Edit Delete
≡ Drag Me	Address 1	No	Edit Delete
≡ Drag Me	Address 2	No	Edit Delete
≡ Drag Me	Phone	No	Edit Delete
≡ Drag Me	Supplier	No	Edit Delete

Click the "Add a Field" clickable link above the Custom / Additional User Account Information Fields opening the Add Field Modal.

Add Field

X

Label *

Type *

Text

▼

☐

Allow multiple values

☐

Required

☐

Sensitive field

Accounts Module Level	View Own	View Other	Edit Own	Edit Other
Admin	☒	☒	☒	☒
Supervisor	☒	☒	☒	☒
Employee	☒	☐	☒	☐
Observer	☒	☒	☐	☐
Logged out user	☒	☒	☒	☒

Save

Cancel

Input the label for the field.

Select the field type (text or email) from the dropdown menu.

Selecting the checkbox enables customization to "Allow multiple values," make the field "Required," or make it a "Sensitive Field."

Designating the field as a "Sensitive Field" allows an extra step in form security when integrating these fields within the Form module. The Form Designer must explicitly choose when they wish to use a sensitive field.

The Permissions Table determines who can view / edit their own and other user's fields. Selecting the checkbox gives the individual the specified permission. Deselecting the checkbox removed the permission.

Select the "Save" button and the custom field now shows in the table.

Use the Drag Me icon to drag and drop the field into your desired position of choice.