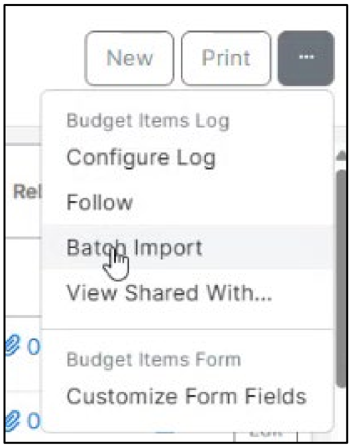
BUDGET ITEMS

In ProjectTeam.com, you can easily track each individual Budget Item by setting the original budget amount and adding or subtracting through Budget Amendments.

To navigate this Quick Reference Guide, simply scroll down, or use the following hyperlinks to jump to a specific section.

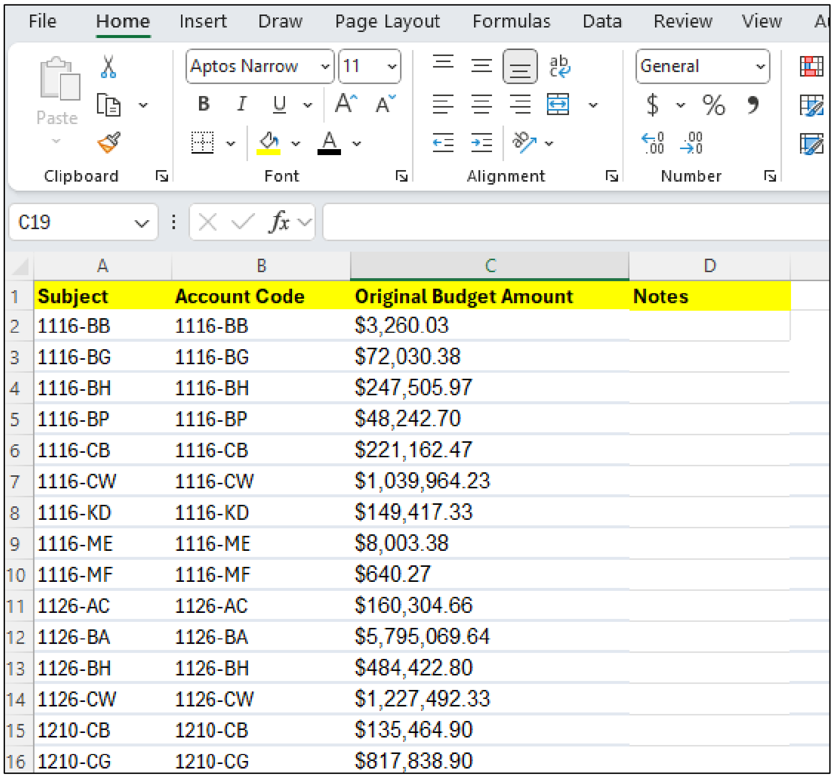
IMPORTING THE INITIAL ESTIMATE

1) You can add each Budget Item manually or by using the Batch Import wizard of ProjectTeam you can easily import the initial estimate.
   a. Open the Budget Item **Log View.**
   b. Select **Batch Import** from the 3-dot ellipsis**.**



   c. **Download** the template.
      i. There will be 4 columns in the template. *Do not change or rearrange them.*
   d. Prepare the CSV file with the project's estimate.
      i. **Subject:** WBS (4 characters)-Commodity Code (2 alpha characters*) Example: 1110-GP*
      ii. **Account Code:** Enter the Account Code which will be the same as the Subject: WBS (4 characters)-Commodity Code (2 alpha characters*) Example: 1110-GP*
         1. **Account Code** in the form is a picklist and the data entered in the CSV must match an existing Account Code.
         2. This will pull the Description from the Account Code but you will not enter it in the CSV.

iii. **Original Budget Amount:** Initial Estimated Amount
iv. **Notes:** Additional Notes, if applicable



	A	B	C	D
1	Subject	Account Code	Original Budget Amount	Notes
2	1116-BB	1116-BB	$3,260.03	
3	1116-BG	1116-BG	$72,030.38	
4	1116-BH	1116-BH	$247,505.97	
5	1116-BP	1116-BP	$48,242.70	
6	1116-CB	1116-CB	$221,162.47	
7	1116-CW	1116-CW	$1,039,964.23	
8	1116-KD	1116-KD	$149,417.33	
9	1116-ME	1116-ME	$8,003.38	
10	1116-MF	1116-MF	$640.27	
11	1126-AC	1126-AC	$160,304.66	
12	1126-BA	1126-BA	$5,795,069.64	
13	1126-BH	1126-BH	$484,422.80	
14	1126-CW	1126-CW	$1,227,492.33	
15	1210-CB	1210-CB	$135,464.90	
16	1210-CG	1210-CG	$817,838.90	

e. **Save** the CSV file.
f. **Upload** to the Batch Import wizard.

Note: If any errors occur the entire import is aborted, and no records will be imported until all errors are corrected.

2) After the records are uploaded, you will be the only one that has access to them until you **Share** them. You can bulk share from the log view. *See the **Sharing QRG** for additional help with sharing Budget Items*.
   a. Check the **Select All** checkbox (beside the Subject header) on each page.
   b. Click the blue **Share** button from the bottom of the page.

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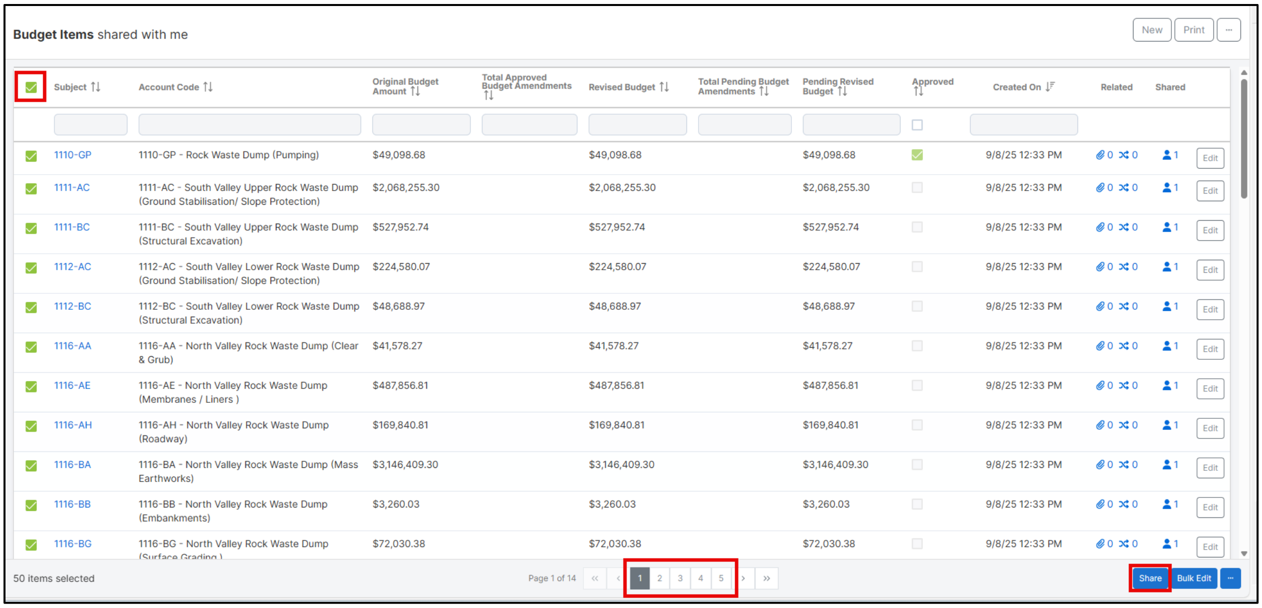
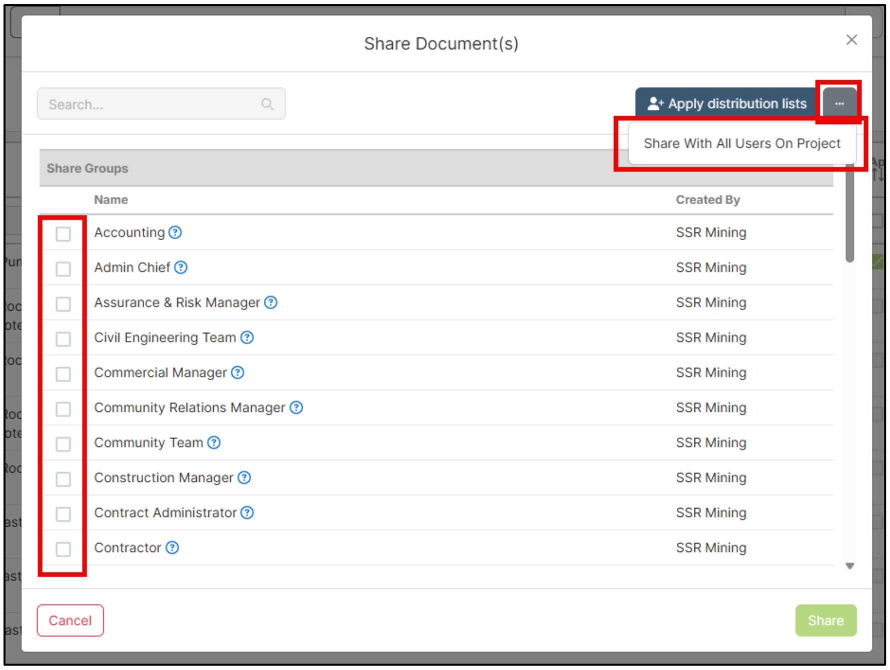


c. Share to one or more **Share Groups** or from the 3-dot ellipsis, click on **Share With All Users on Project.**



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BUDGET ITEM FORM

3) Upon successful import you can view the imported records in the log view. The Subject is a link into the individual Budget Item where you can see additional fields and track the Amendments to the Budget Item.

   a. **Initial Set up of the Item:** Subject, Account Code, Original Budget Amount and the Notes

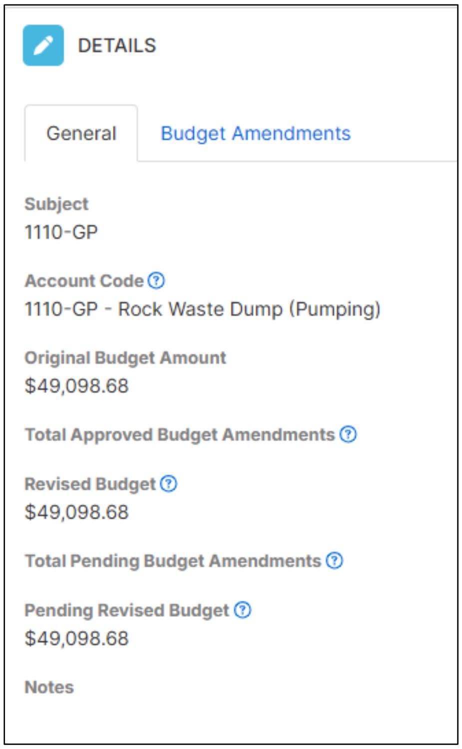
   b. **Formulas**

      i. **Total Approved Budget Amendments:** Total of all approved Budget Amendments (Detailed in the Budget Amendments tab).

      ii. **Revised Budget:** Original Budget Amount + Approved Budget Amendments

      iii. **Total Pending Budget Amendments:** Total of all non-approved Budget Amendments (Detailed in the Budget Amendments tab)

      iv. **Pending Revised Budget:** Revised Budget + Pending Budget Amendments



   c. **Budget Amendment Tab:** At the top of the Details panel there are 2 tabs, you can switch to the Budget Amendment tab to see the Approved and Pending Budget Amendments.

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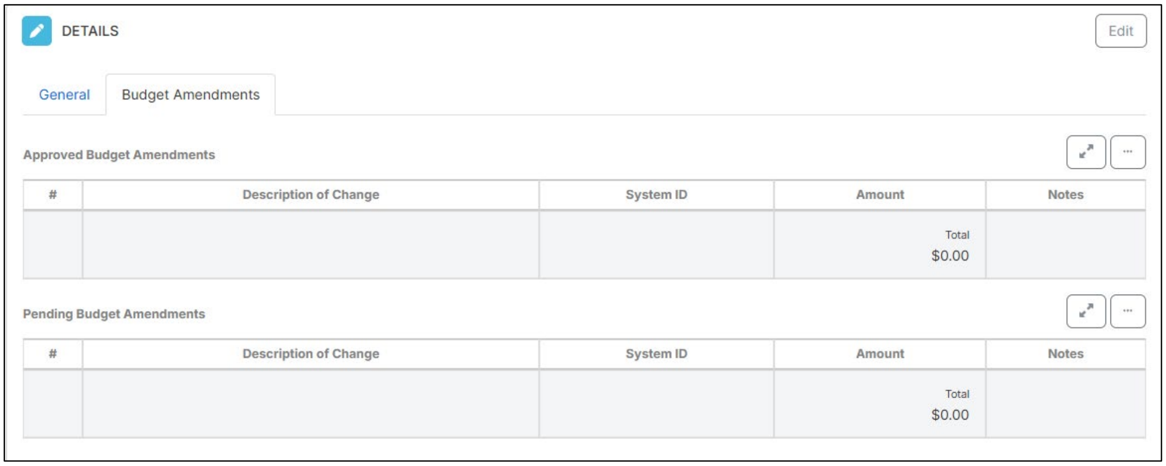


DETAILS

General | Budget Amendments

Approved Budget Amendments

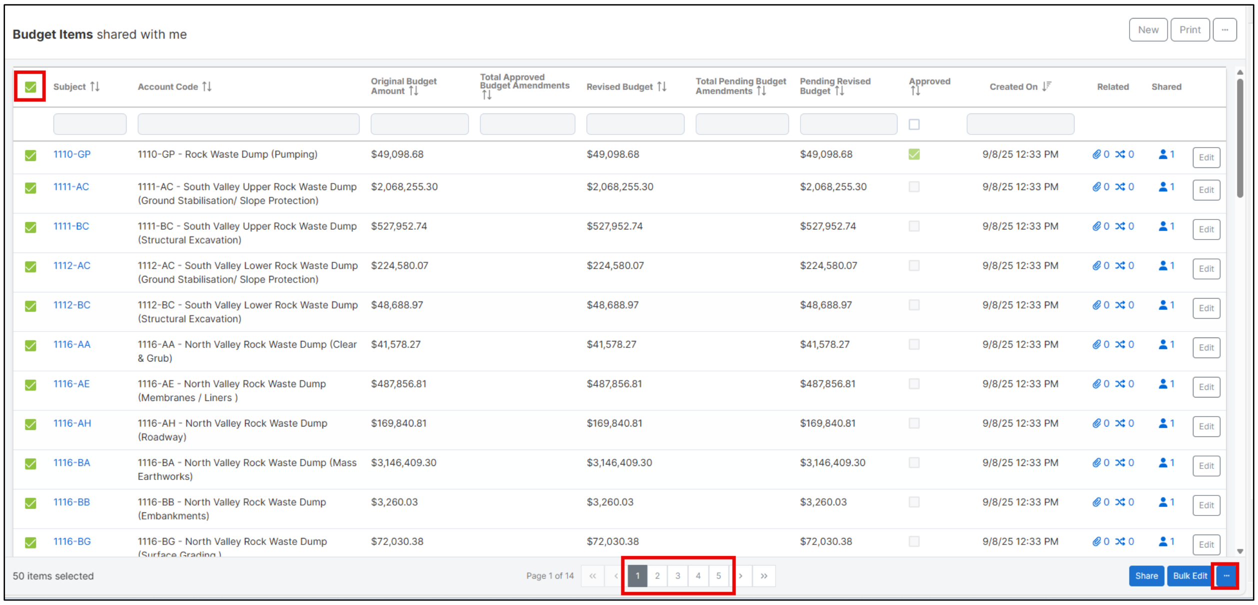
#	Description of Change	System ID	Amount	Notes
			Total $0.00	

Pending Budget Amendments

#	Description of Change	System ID	Amount	Notes
			Total $0.00	

APPROVING/UNAPPROVING THE BUDGET ITEM

4) Once the initial estimate is uploaded, you have the option to approve each item individually or approve all at once from the Budget Items log.
   a. To **Approve All** from the log view:
      i. Check the **Select All** checkbox (beside the Subject header) on each page.
      ii. Select **Approve** from the blue 3-dot ellipsis on the bottom of the page.



Budget Items shared with me

New | Print | ···

Subject	Account Code	Original Budget Amount	Total Approved Budget Amendments	Revised Budget	Total Pending Budget Amendments	Pending Revised Budget	Approved	Created On	Related	Shared
1110-GP	1110-GP - Rock Waste Dump (Pumping)	$49,098.68		$49,098.68		$49,098.68	✓	9/8/25 12:33 PM	0 0	1
1111-AC	1111-AC - South Valley Upper Rock Waste Dump (Ground Stabilisation/ Slope Protection)	$2,068,255.30		$2,068,255.30		$2,068,255.30		9/8/25 12:33 PM	0 0	1
1111-BC	1111-BC - South Valley Upper Rock Waste Dump (Structural Excavation)	$527,952.74		$527,952.74		$527,952.74		9/8/25 12:33 PM	0 0	1
1112-AC	1112-AC - South Valley Lower Rock Waste Dump (Ground Stabilisation/ Slope Protection)	$224,580.07		$224,580.07		$224,580.07		9/8/25 12:33 PM	0 0	1
1112-BC	1112-BC - South Valley Lower Rock Waste Dump (Structural Excavation)	$48,688.97		$48,688.97		$48,688.97		9/8/25 12:33 PM	0 0	1
1116-AA	1116-AA - North Valley Rock Waste Dump (Clear & Grub)	$41,578.27		$41,578.27		$41,578.27		9/8/25 12:33 PM	0 0	1
1116-AE	1116-AE - North Valley Rock Waste Dump (Membranes / Liners)	$487,856.81		$487,856.81		$487,856.81		9/8/25 12:33 PM	0 0	1
1116-AH	1116-AH - North Valley Rock Waste Dump (Roadway)	$169,840.81		$169,840.81		$169,840.81		9/8/25 12:33 PM	0 0	1
1116-BA	1116-BA - North Valley Rock Waste Dump (Mass Earthworks)	$3,146,409.30		$3,146,409.30		$3,146,409.30		9/8/25 12:33 PM	0 0	1
1116-BB	1116-BB - North Valley Rock Waste Dump (Embankments)	$3,260.03		$3,260.03		$3,260.03		9/8/25 12:33 PM	0 0	1
1116-BG	1116-BG - North Valley Rock Waste Dump (Surface Grading)	$72,030.38		$72,030.38		$72,030.38		9/8/25 12:33 PM	0 0	1

50 items selected — Page 1 of 14 — 1 2 3 4 5 — Share | Bulk Edit | ···

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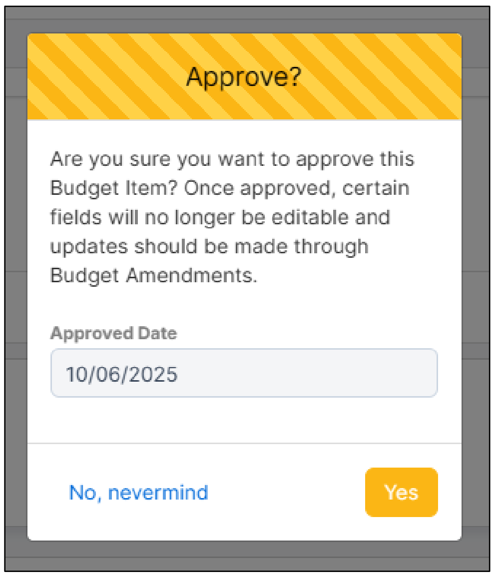
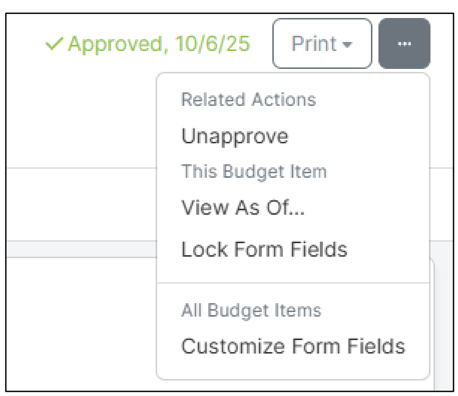
b. To **Approve** an individual record:
   i. Clicking the **Approve Budget Item** button at the top of the open record will bring up a confirmation modal. The confirmation modal notifies the user that after marking the form final and saving, certain fields will be locked and no additional changes can be made. Those fields include:
      1. Account Code
      2. Original Budget Amount
   ii. In the confirmation modal, you are required to add an "Approved Date". Choose the date that the Budget Item was approved from the calendar picker field. Once complete, click "Yes" to approve and lock.



5) If there has been a mistake and the Budget Item was marked “Approved” prematurely, a Project Administrator can unapproved it to edit again.
   a. To unapprove, click the options (...) button on the top right of the Budget Item form in view mode. In the "Related Actions" section of the dropdown, click the **Unapprove** option.



RELATED RESOURCES

HELP PAGES:

Batch Import Records

Budget Item Overview

Budget Amendment Overview

RELATED QRGs

Budget Amendment QRG

Sharing

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