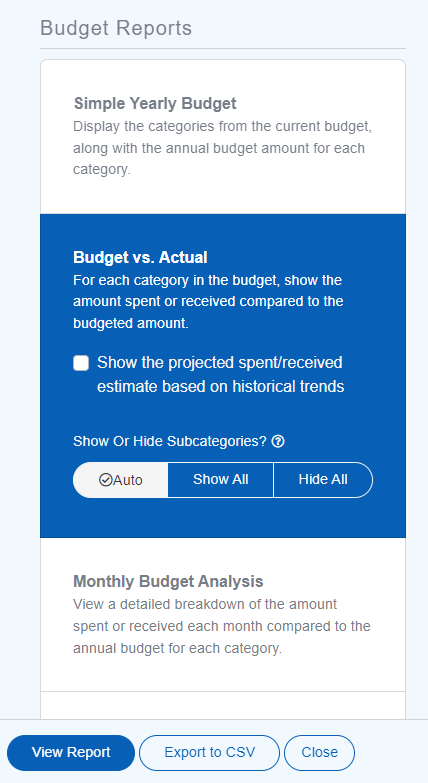
**ChurchTrac Budget Report Production Instructions**

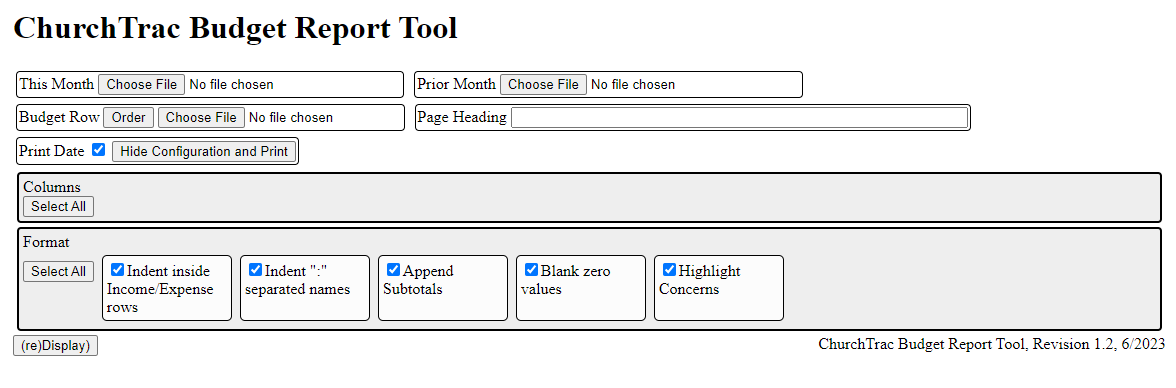
From ChurchTrac, go to accounting / budgets, select the desired budget **and ending date**, then from Actions, choose budget reports, then budget vs actual and press “Export as csv”.

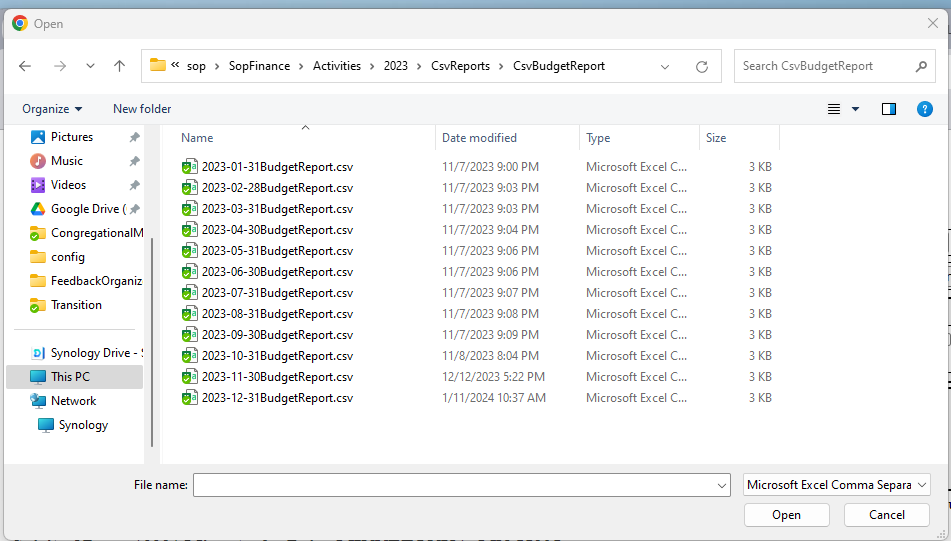


It will save a file to the downloads directory named export.csv (or possibly export(n).csv if another is already present). Rename it with a meaningful name and move it to your designated location.

When using this tool, especially when using more than one CSV file to “Current Month” values, It is a good idea to preserve the CSV files together in a designated location. Our naming convention is yyyy-mm-ddBudgetReport.csv. Note that the report title is derived from the filename, and is intended to support correlating it to the origin csv file (preserved in the designated location along with other reporting artifacts). In our case, the title will read “yyyy-mm-dd Budget Report”.

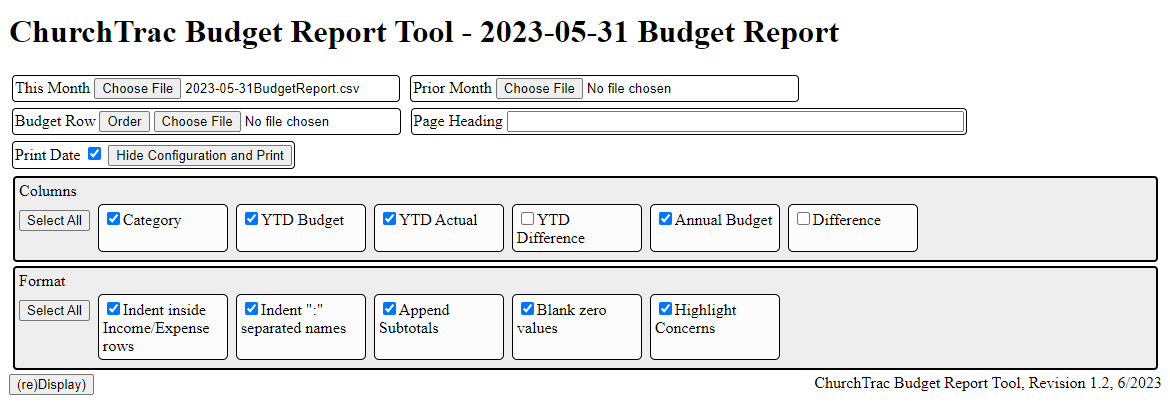
Navigate to <https://www.spiritofpeacecommunity.org/tools/>

Select “Budget Report Tool”. It will open in a browser and look something like this. Note that the browser tries to remember the Page Heading and most of the checkboxes that were used in the most recent “(re)Display”. 

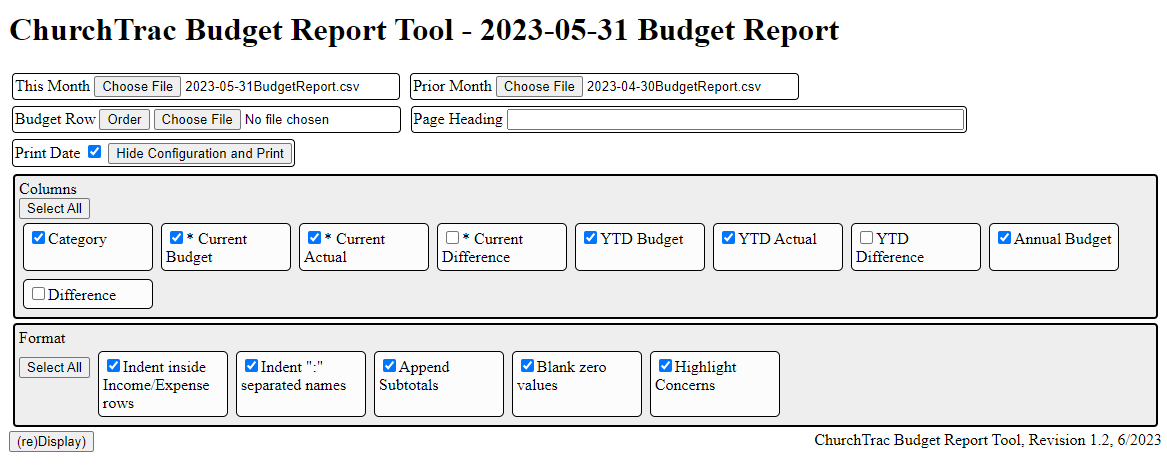
Click “Choose File” for “**This Month**”, and a file open dialog will appear. Navigate to your designated location if not already there

Select the CSV file for the current report month and press “Open”

The report tool will refresh showing the columns contained in this csv file.



If you want to report values for the current month, you can do so by adding the prior month’s csv file. clicking “Choose File” for “**Prior Month**”, You should have already preserved the prior month’s CSV file in its designated location



**The current month Budget / Actual / Difference columns are now available for the report**

Creating Report

* Check the boxes for the columns that you want in the report, and the format features you want to use. (When in doubt, you can always start by pressing “Select All”.)
* **Enter a page heading, such as the church name and address.**
* Check the Print Date box if you want the printed date in the report
* Choose a Budget Row Order file if you want to control the displayed row order (See section “**Budget Order Row**” for more details)
* Press (re)Display to view the report. You may experiment by checking / unchecking various selections and redisplaying using the modified configuration.

Saving PDF version of report

* Press “Hide Configuration and Print” and you will get a print dialog allowing you to print only the report part of what you see.
* **NOTE** the background coloring will only appear in the PDF file if “More Settings->Background Graphics” is check marked.
* Choose the destination “Save as PDF” and press “Save”.
* Browse to destination location and specify filename to save.

Other thoughts

* The tool does not rely upon rigid column definitions, so you could, for example open the CSV fie in a CSV editor (such as Excel) and add a comment column containing anomaly explanations for certain rows, and it will be available to display as part of the report.

**Budget Row Order**

A budget row order file may be used to stipulate the row order of the report. The file is a plain text file containing one category name per line. When the report is created, it will order the rows in the same order as they are in this file.

**WARNING**: The file must have exactly the same categories as in the report. If they are different, report generation will be abandoned.

**WARNING**: “empty” category names are significant. The budget report will normally have at least one empty category name. If there is not a corresponding empty line in the file, it will be identified as incompatible.

Load a Row Order file by pressing “Choose File” in the Budget Row Order section.



The easiest way to create a new Row Order file is to press “Order” in the Budget Row Order section. A window will pop up with the current row order. Select the contents and copy / paste them into a new text file, then open that file in a text editor such as Notepad and rearrange the line sequence.