

Contributors quickstart guide

You receive a budget or a portion of a budget to review in Sage Intacct Planning - what now?

In Sage Intacct Planning, the colleague that sent you the budget to review is known as the **budget owner** and you are known as a **contributor**.

Let's look at some key features that you need to know as a contributor.

Access the budget

As a contributor to your organization's budget, you receive the following email invitations:

- Access Sage Intacct Planning
- Access the specific budget shared by the budget owner

Follow the instructions to complete your access.

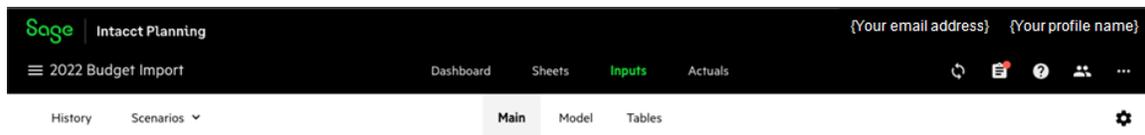
Additional budgets

If the budget owner grants you access to additional budgets, you receive separate email notifications for each budget.

Navigation

As a contributor, you do most of your work in the following tabs:

- Inputs > Main
- Inputs > Sheets



The menu items that appear above vary according to the level of access that the budget owner grants you.

If you have been granted access to multiple budgets, click the menu icon  that appears in the upper left corner to navigate between budgets.

Click on your name that appears in the top right corner to access the following:

- Profile details
- Tutorial videos
- Help center
- Guided walkthrough

Budget tree

The **Inputs > Main** tab is where you view and make changes to your budget. There are 2 main sections:

- **Budget tree**- Appears on the left, for navigating between budget lines.
- **Data entry area**- Appears on the right, for viewing data or making changes.

	JAN 2022	FEB 2022	MAR 2022	APR 2022	MAY 2022	JUN 2022	JUL 2022	TOTAL
2022 Budget Import	(\$578,461)	(\$727,014)	\$1,493,939	\$48,523	(\$593,297)	\$1,756,483	(\$175,902)	\$881,064
Revenues	\$271,198	\$100,595	\$2,296,023	\$800,595	\$155,275	\$2,363,305	\$77,743	\$7,001,644
Cost of Revenues	(\$896,154)	(\$871,154)	(\$846,154)	(\$796,154)	(\$796,154)	(\$641,154)	(\$287,477)	(\$6,590,176)
Direct Labor (4100-00)	(\$71,457)	(\$71,457)	(\$71,457)	(\$71,457)	(\$71,457)	(\$71,457)	(\$71,457)	(\$857,479)
Admin Labor (4150-00)	(\$17,928)	(\$17,928)	(\$17,928)	(\$17,928)	(\$17,928)	(\$17,928)	(\$17,928)	(\$215,134)
Direct Expenses (4200-00)	(\$700,000)	(\$675,000)	(\$650,000)	(\$600,000)	(\$600,000)	(\$445,000)	(\$91,323)	(\$4,236,323)
Burden (4050-00)	(\$106,770)	(\$106,770)	(\$106,770)	(\$106,770)	(\$106,770)	(\$106,770)	(\$106,770)	(\$1,281,240)
Operational Expenses	\$46,495	\$43,545	\$44,070	\$44,082	\$47,582	\$34,332	\$33,832	\$469,596

Budget tree views

You can select one of the following views for your budget tree:

- **Budget Lines** - (Default) Displays the names of the budget lines and the account number
- **Account & Names** - Displays the account number followed by the account name
- **Account** - Displays the account number only
- **Leaf level** - Displays all the budget lines in list form without the hierarchical structure

Use **Search** to help you locate a specific budget line or account number, and click the expand & collapse icons to see more or less budget lines.

Make changes to your budget

There are 2 types of ways to view your budget data:

- **Form view**- (Default) Displays all values and properties that apply to the selected budget line or group
- **Grid entry view**- Enables you to view all the budget line values at the same time in a grid format

We recommend to you as the contributor to use grid entry view.

To switch between the views, click the **Grid entry** toggle which appears on the upper right the budget values.

P&L	Budget	Monthly	USD	Numbers	All Tags	All Accounts	Grid entry <input checked="" type="checkbox"/>
JAN 2022	FEB 2022	MAR 2022	APR 2022	MAY 2022	JUN 2022	JUL 2022	TOTAL
(\$578,461)	(\$727,014)	\$1,493,939	\$48,523	(\$593,297)	\$1,756,483	(\$175,902)	\$881,064
\$271,198	\$100,595	\$2,296,023	\$800,595	\$155,275	\$2,363,305	\$77,743	\$7,001,644
(\$896,154)	(\$871,154)	(\$846,154)	(\$796,154)	(\$796,154)	(\$641,154)	(\$287,477)	(\$6,590,176)
(\$71,457)	(\$71,457)	(\$71,457)	(\$71,457)	(\$71,457)	(\$71,457)	(\$71,457)	(\$857,479)
(\$17,928)	(\$17,928)	(\$17,928)	(\$17,928)	(\$17,928)	(\$17,928)	(\$17,928)	(\$215,134)
(\$700,000)	(\$675,000)	(\$650,000)	(\$600,000)	(\$600,000)	(\$445,000)	(\$91,323)	(\$4,236,323)
(\$106,770)	(\$106,770)	(\$106,770)	(\$106,770)	(\$106,770)	(\$106,770)	(\$106,770)	(\$1,281,240)
\$46,495	\$43,545	\$44,070	\$44,082	\$47,582	\$34,332	\$33,832	\$469,596

Navigate grid entry view

You can only make changes to budget lines that appear in white. Lines that appear in grey are view only.

To make changes to a value in a cell, double-click the cell and enter the new value.

To see the more details for a budget line, double-click on the budget line name in the budget tree to open a flyout.

To close the flyout and return to grid entry view, either double-click outside the flyout, click the hide flyout icon, or click **Save**.

Cost of Revenues > Admin Labor

Admin Labor (4150-00) | Type: Expense

Preview of P&L | By: Month

JAN 2022	FEB 2022	MAR 2022	APR 2022	MAY 2022	JUN 2022	JUL 2022	AUG 2022	TOTAL
(\$17,928)	(\$17,928)	(\$17,928)	(\$17,928)	(\$17,928)	(\$17,928)	(\$17,928)	(\$17,928)	(\$215,134)

Occurs: Monthly | Spread: Same amount each month

Amount: \$17,927.85 | USD | Payment: months after

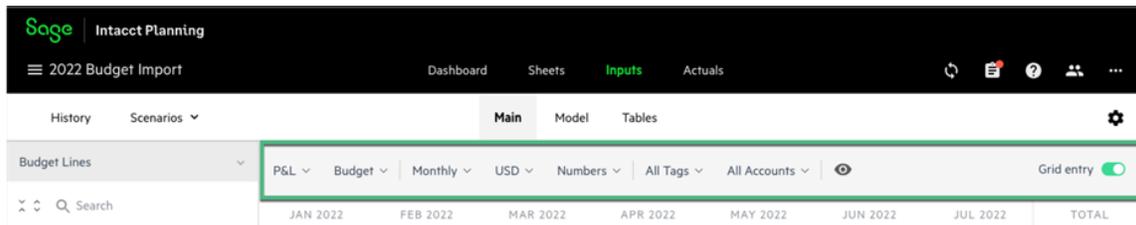
GENERAL

Date Range: 01/2022 | 12/2022 | Tags

DIMENSIONS

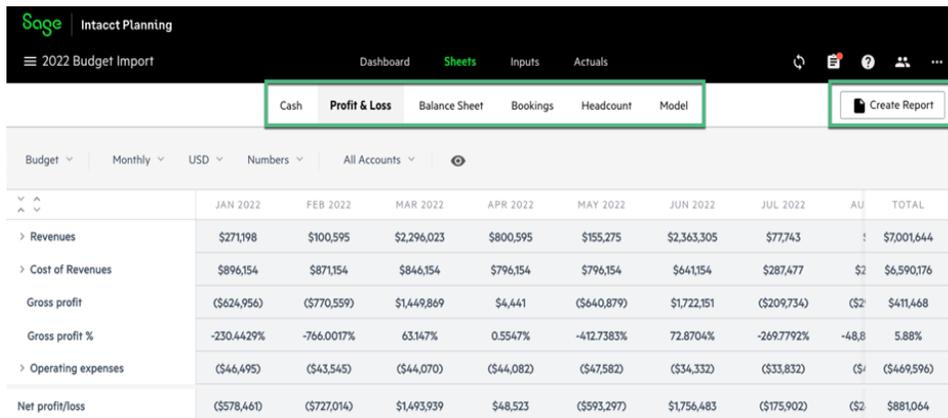
Close Save

In the grid entry view ribbon, you can apply filters to limit the data that appears in the grid.

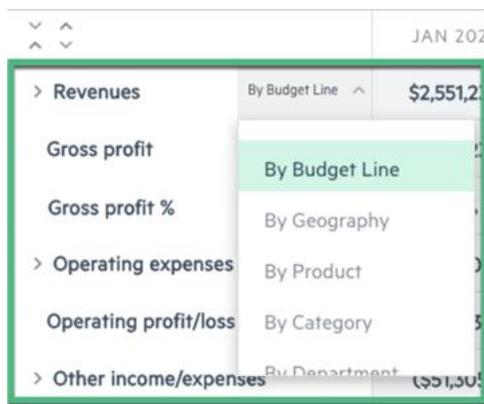


Reporting

To view and create financial reports, click **Sheets**, and navigate between six main types of reports.



To view a reporting group by a different dimension, hover over a reporting group, click **By Budget Line** (default), and select a different dimension.



To export reports to Excel or PDF format, click **Create Report**.