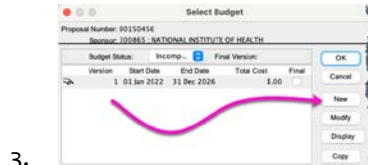## *Budget Information*
How do I enter budget information into my proposal?
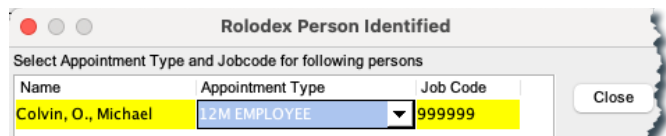
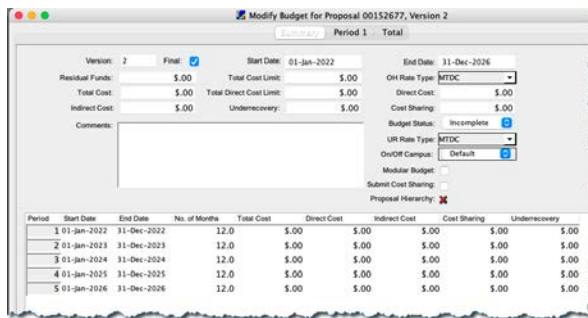## *Creating a New Budget*
Opening a Budget

1.   From the **PROPOSAL DETAILS** screen click the **Proposal Budget** icon .

2.   Click **New**.

3.

4.   If there are Rolodex Key Persons, this window will appear; simply click on **<Close>**.

5.   The **Budget Summary** tab opens. This is the only window that must be completed with dollar figures.

Adjusting Period Boundaries

Only use if you need to change the budget period to a length different than 12 months.

Coeus defaults to create 12-month budget periods, but you can adjust the number of periods and their lengths based on sponsor requirements.

After opening the budget in the record, click on modify and complete the following steps:

1.   Select **Budget Periods > Adjust Period Boundaries**.

2.   Use the buttons for the following actions:
     - **Add** — Add a period at the end of the list.
     - **Insert** — Insert a period before the selected period. To select a period, click in the row.
     - **Delete** — Delete the selected period.
     - **Default** — Sync to the default 12-month periods defined by the **Start Date** and **End Date** on the **SUMMARY** tab.
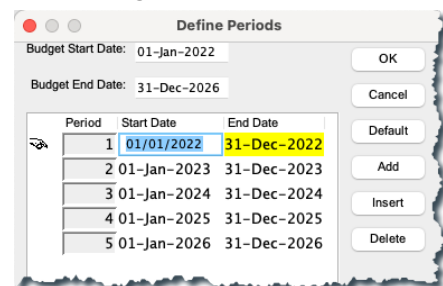
3.   Click in the **Start Date** or **End Date** field and enter or revise the date in **mm/dd/yyyy** format.

4.   Click **OK** to save changes or **Cancel** to take no action. Any changes are reflected in the grid at the bottom of the **SUMMARY** tab.

Adjusting Proposal Rates

After opening the budget, complete the following steps:

1. Click the **Maintain Rates for the Proposal** icon ![%].

2. Change a rate by clicking in the appropriate **Applicable Rate** field and entering the new rate.

3. Click **<OK>**.

4. A verification message opens: "Saving will entail recalculation of the budget. Continue?" Click on **<Yes>**.
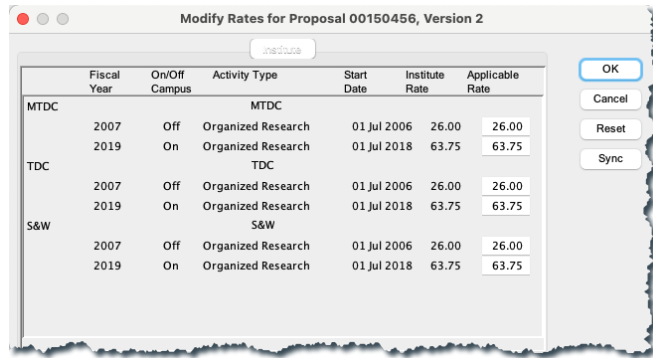
RETURNING TO DEFAULT RATES

To return to the currently applicable rates, open the **MODIFY RATES** window and click **<Sync>**.

Finalizing the Budget

One version of the budget must be marked **Final** and **Complete** before the proposal is submitted for approval. You can finalize the version on the **SELECT BUDGET** window list or on the version's **SUMMARY** tab.

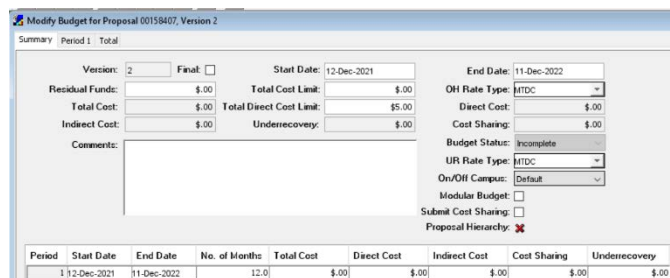### From the Select Budget Window

1. Select the **Final** checkbox for the version.

2. This message displays: "You are modifying the final version status. Are you sure?" Click on **<Yes>**.

3. In the **Budget Status** field, select **Complete** from the drop-down list.
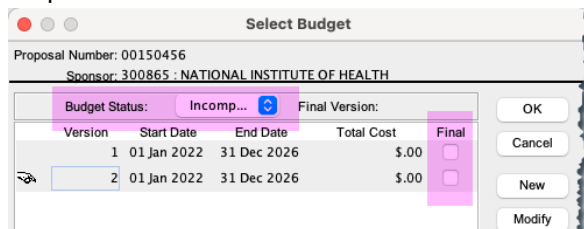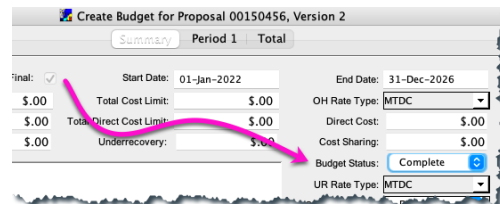
4. Click **<OK>** and then click the **Save** icon ![save].

From the Budget Summary Tab

1. Open the **SUMMARY** tab of the selected version by clicking on the Budget you want to finalize.

2. Select the **Final** checkbox.

3. This message displays: "You are designating a new final version. Are you sure?" Click on **<Yes>**.

4. In the **Budget Status** field, select **Complete** from the drop-down list.

5. Click the **Save** icon ![save].

Last Revised 11 November 2021