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The screenshot shows the Skyward Financial Management web application. The browser title is "Skyward Financial Management: FM - 10636 (04.10.01.02.00) - Windows Internet Explorer". The navigation bar includes tabs for "EDUCATOR ACCESS™ plus", "PRODUCT SETUP", "STUDENT MANAGEMENT", "HUMAN RESOURCES", "FINANCIAL MANAGEMENT", and "EMPLOYEE ACCESS™". A "Print this tutorial" button is visible. The user is logged in as "Anthony Busbeescr" on "Friday, May 7th, 2010". The main menu contains various icons for functions like "Product Setup", "Account Management", "Vendors", "Purchasing", "Accounts Payable", "Accounts Receivable", "Fixed Assets", "Inventory", "School Based Activity Acct", "Custom Reports", "Federal/State Reporting", "Account MAster", "Budget Management", "Gen. Input", "Project/Grant Management", "Reports", "REquisitions", "Budget Entry", "Transfers", "Submit Transfers", "APprovals", and "Activity".

**Submit Budget Transfers**

Go to Financial Management, Account Management, Budget Management, Transfers, Submit Transfers.

**Who, What, When, Why?**  
Budget transfers are used to transfer funds from one account to another showing a clear paper trail of funds.

Employees who work with the budget would submit transfers when the district requires they be approved before they affect the budget.

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WFVAMBMTRIST - 11562 - 04.10.01.02.00 - Windows Internet Explorer

Skyward School District User Name: Anthony Busbeescr Thursday, May 6th, 2010

Submit Transfers - General - All

Create Date	BT Group	S	T	Batch	Description	Debit Amount	Credit Amount	Net Amount	Entered I
No records available									

0 records displayed

Create Date:

Click Add.

Slide 3 - Slide 3

The screenshot shows a web browser window titled "WF1AMBMATRIST Explorer" with the URL "http://www.wf1ambmatrist.com/Transfers - General | Budget Transfers". The page content is as follows:

**Budget Transfers**  
\* Budget Transfer Group: 001 High School  
\* Fiscal Year: 2009 - 2010  
\* Transfer Type: Expense (with a "Rules" link)  
\* Description: Funds moved from 1200 to 1270  
Number: 09-00006

**Budget Transfer Detail List**

General Ledger Account	Transfer From	Transfer Amount	Debit Amount	Credit Amount
Account: 10E000 1110 1200 00 000000 GENERAL ED/DISTRICT WIDE/ELEMENTARY/TEMP SAL Description: Wrong account	Transfer From	500.00	0.00	500.00
Account: 10E000 1110 1270 00 000000 GENERAL ED/DISTRICT WIDE/ELEMENTARY/SUB/NON- Description: Correct account	Transfer To	500.00	500.00	0.00
Account: <input type="text"/> Description: <input type="text"/>	Transfer From	0.00	0.00	0.00
Account: <input type="text"/> Description: <input type="text"/>	Transfer From	0.00	0.00	0.00

Asterisk (\*) denotes a required field

Callout boxes provide instructions: "Choose a Budget Transfer Group if your district uses these.", "Choose the Fiscal Year and Transfer Type - Expense or Revenue.", and "Give this budget transfer a general description." Buttons on the right include "Submit for approval", "Save and finish later", and "Back".

Slide 4 - Slide 4

The screenshot shows a web browser window titled "WF1AMBMATRIST - 11562 - 04.10.01.02.00 - Windows Internet Explorer". The browser's address bar shows the path: Home Page | Acct Mgmt | Budget Mgmt | Budget Transfers | Submit Transfers - General | Budget Transfers. The main content area is titled "Budget Transfers" and contains the following fields:

- \* Budget Transfer Group: 001 High School
- \* Fiscal Year: 2009 - 2010
- \* Transfer Type: Expense (with a "Rules" link)
- \* Batch Number: 09-00006
- \* Description: Funds moved from 1200 to 1270

On the right side, there are three buttons: "Submit for approval", "Save and finish later", and "Back".

The main form area is divided into sections for "Detail Budget Transfer". Each section includes:

- General Ledger Account
- Account: (dropdown menu)
- Description: (text field)
- Transfer From/To (dropdown menu)
- Transfer Amount (text field)
- Debit Amount and Credit Amount (text fields)

Four yellow callout boxes with numbered instructions are overlaid on the form:

1. Choose your account.
2. Choose to Transfer From or Transfer To this account.
3. Enter the amount.
4. Enter a description for this line.

The first "Detail Budget Transfer" section shows "Account: 10E000 1110 1200 00 000000 GENERAL ED/DISTRICT WIDE/ELEMENTARY/TEMP SAL" and "Description: Wrong account". The "Transfer From" dropdown is selected, and the "Transfer Amount" is 500.00.

The second "Detail Budget Transfer" section shows "Account: 10E000 1110 1270 00 000000 GENERAL ED/DISTRICT WIDE/ELEMENTARY/SUB/NON-C" and "Description: Correct account". The "Transfer To" dropdown is selected, and the "Transfer Amount" is 500.00. Below this, "Debit Amount" is 500.00 and "Credit Amount" is 0.00.

The remaining three "Detail Budget Transfer" sections are empty, with "Account" and "Description" fields blank, and "Transfer From" dropdowns selected, and "Transfer Amount", "Debit Amount", and "Credit Amount" fields set to 0.00.

At the bottom left, a note states: "Asterisk (\*) denotes a required field".

Slide 5 - Slide 5

The screenshot shows a web browser window titled "WF\AMBMATRIST - 11562 - 04.10.01.02.00 - Windows Internet Explorer". The page is for "Submit Transfers - General | Budget Transfers".

**Budget Transfers**  
\* Budget Transfer Group: 001 High  
\* Fiscal Year: 2009  
\* Transfer Type: Expense  
\* Description: Funds mo...  
Amount: 0.00

**Budget Transfer Detail Lines**

Detail Budget Transfer	General Ledger Account	Transfer Amount
Account: 10E000 1110 1200 00	Description: Wrong account	From 500.00
Account: 10E000 1110 1270 00 000000 GENERAL ED/DISTRICT WIDE/ELEMENTARY/SUB/NON-...	Description: Correct account	Transfer To 500.00
Account: [Empty]	Description: [Empty]	Transfer From 0.00
Account: [Empty]	Description: [Empty]	Transfer From 0.00

Asterisk (\*) denotes a required field

**Callouts:**

- 2. The credits must equal the debits for all funds involved.  
Example: If there are \$500.00 in credits for fund 10 then there needs to be \$500.00 in debits for fund 10.
- 3. If finished, click to submit for approval.
- 4. If you will finish this transfer later click to Save and Finish Later.
- 1. Fill in the next Transfer To or From account information.  
Note: Budget Transfers allow a one to one, one to many, or many to one relationship.

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WFLAMBMTRIST - 11562 - 04.10.01.02.00 - Windows Internet Explorer

Skyward School District User Name: Anthony Busbeescr Thursday, May 6th, 2010

Submit Transfers - General Back

Create Date	BT Group	S	T	Batch	Description	Debit Amount	Credit Amount	Net Amount	Entered I
05/06/2010	001	S	E	09-00006	Funds moved from 1200 to 1270	500.00	500.00	0.00	busbeescr

1 records displayed Create Date:

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WFVAMBMTRIST - 11562 - 04.10.01.02.00 - Windows Internet Explorer

★ Favorites | Notes | Preferences | Create New Window | Customer Access | Help

We value your feedback

Skyward School District User Name: **Anthony Busbeescr** Examples Thursday, May 6th, 2010

Home Page | Acct Mgmt | Budget Mgmt | Budget Transfers | Submit Transfers - General Back

Submit Transfers - General - All

Create Date	BT Group	S	T	Batch	Description	Debit Amount	Credit Amount	Net Amount	Entered I
05/06/2010	001	S	E	09-00006	Funds moved from 1200 to 1270	500.00	500.00	0.00	Busbeescr

Expand All Collapse All Show Details In New Window Modify Details (displaying 3 of 3)

- General
- Detail Lines
- Approval

Filter Options  
Refresh  
Add  
Edit  
Delete

Here you can view **general** information, **detail lines**, and **approval** information.  
This concludes the tutorial.

1 records displayed Create Date: