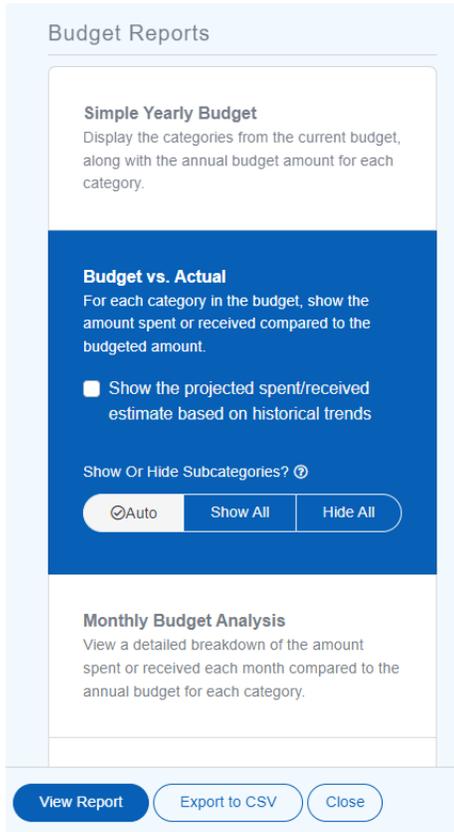


# ChurchTrac Budget Report Production Instructions

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”.



**Budget Reports**

**Simple Yearly Budget**  
Display the categories from the current budget, along with the annual budget amount for each category.

**Budget vs. Actual**  
For each category in the budget, show the amount spent or received compared to the budgeted amount.

Show the projected spent/received estimate based on historical trends

Show Or Hide Subcategories? ⓘ

Auto Show All Hide All

**Monthly Budget Analysis**  
View a detailed breakdown of the amount spent or received each month compared to the annual budget for each category.

View Report Export to CSV Close

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.

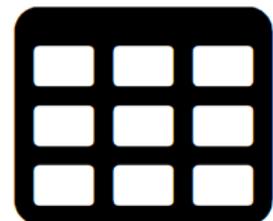
When using this tool, especially when using more than one CSV file to “Current Month” values, It is a good idea to preserve the CSV files together in a designated location. Our naming convention is yyyy-mm-ddBudgetReport.csv. Note that the report title is derived from the filename, and is intended to 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/>

## Spirit of Peace Tools

### Budget Report Tool

Html / Javascript based tool for presenting and enhancing ChurchTrac budget reports using the file created by exporting as CSV.



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".

## ChurchTrac Budget Report Tool

This Month  No file chosen    Prior Month  No file chosen

Budget Row   No file chosen    Page Heading

Print Date

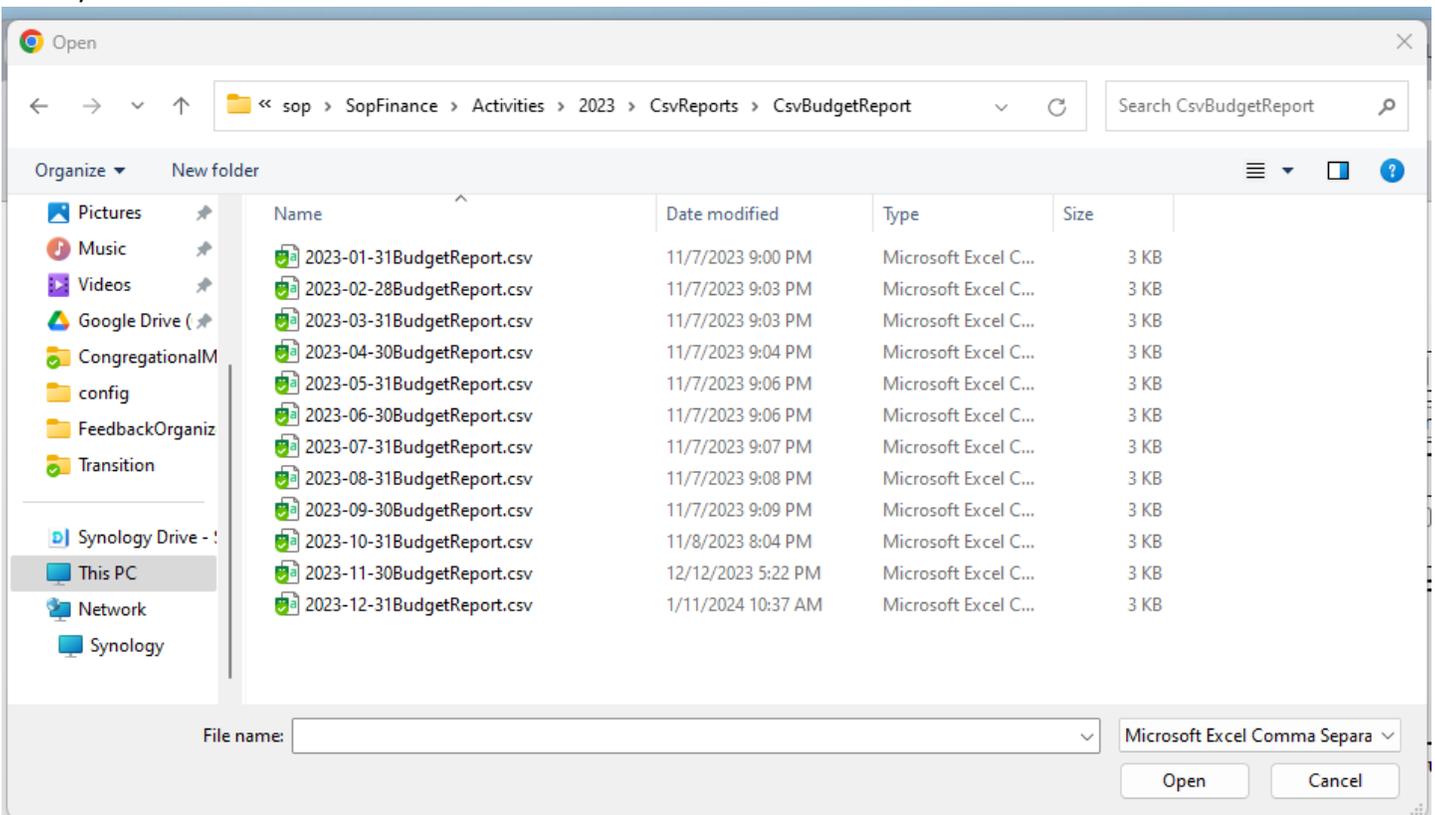
Columns

Format

Indent inside Income/Expense rows     Indent ":" separated names     Append Subtotals     Blank zero values     Highlight Concerns

ChurchTrac Budget Report Tool, Revision 1.2, 6/2023

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.

## ChurchTrac Budget Report Tool - 2023-05-31 Budget Report

This Month	Choose File	2023-05-31BudgetReport.csv	Prior Month	Choose File	No file chosen	
Budget Row	Order	Choose File	No file chosen	Page Heading		
Print Date	<input checked="" type="checkbox"/>	Hide Configuration and Print				
Columns						
Select All	<input checked="" type="checkbox"/> Category	<input checked="" type="checkbox"/> YTD Budget	<input checked="" type="checkbox"/> YTD Actual	<input type="checkbox"/> YTD Difference	<input checked="" type="checkbox"/> Annual Budget	<input type="checkbox"/> Difference
Format						
Select All	<input checked="" type="checkbox"/> Indent inside Income/Expense rows	<input checked="" type="checkbox"/> Indent ":" separated names	<input checked="" type="checkbox"/> Append Subtotals	<input checked="" type="checkbox"/> Blank zero values	<input checked="" type="checkbox"/> Highlight Concerns	
(re)Display						ChurchTrac Budget Report Tool, Revision 1.2, 6/2023

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

## ChurchTrac Budget Report Tool - 2023-05-31 Budget Report

This Month	Choose File	2023-05-31BudgetReport.csv	Prior Month	Choose File	2023-04-30BudgetReport.csv				
Budget Row	Order	Choose File	No file chosen	Page Heading					
Print Date	<input checked="" type="checkbox"/>	Hide Configuration and Print							
Columns									
Select All	<input checked="" type="checkbox"/> Category	<input checked="" type="checkbox"/> * Current Budget	<input checked="" type="checkbox"/> * Current Actual	<input type="checkbox"/> * Current Difference	<input checked="" type="checkbox"/> YTD Budget	<input checked="" type="checkbox"/> YTD Actual	<input type="checkbox"/> YTD Difference	<input checked="" type="checkbox"/> Annual Budget	
	<input type="checkbox"/> Difference								
Format									
Select All	<input checked="" type="checkbox"/> Indent inside Income/Expense rows	<input checked="" type="checkbox"/> Indent ":" separated names	<input checked="" type="checkbox"/> Append Subtotals	<input checked="" type="checkbox"/> Blank zero values	<input checked="" type="checkbox"/> Highlight Concerns				
(re)Display						ChurchTrac Budget Report Tool, Revision 1.2, 6/2023			

**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 checked.
- 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 file 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.

Budget Row   2023BudgetRowOrder.txt

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.