CIRCLE OF SERVICE FOUNDATION
*Supporting great organizations to enhance community, opportunity and well-being*

How to complete your budget in your full application in SmartSimple (Section does not apply to pre-application)

Click here **to watch the video on how to complete your budget information in your application**

This how-to guide and accompanying video will give you step-by-step instructions on how to fill out your budget information.

1. To fill out your budget information for an application, go to the tab of your application labeled "Revenue and Expenses." At the top of this area, you'll see the "Budget" header. Under there, click the blue button labeled "$ Click here to enter the budget."
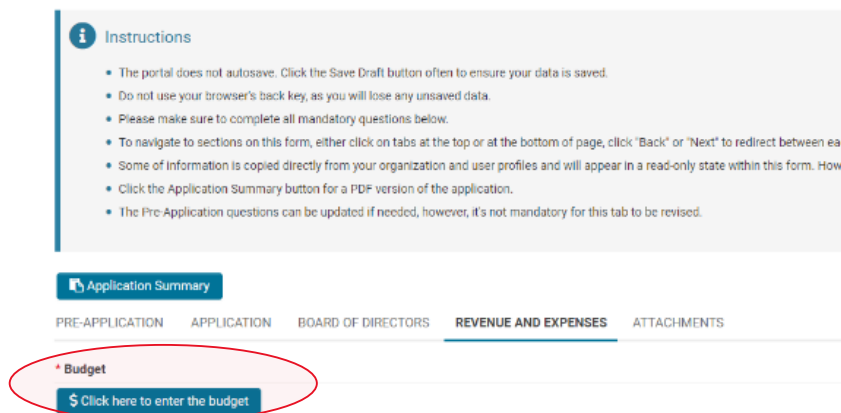
2. A new window appears to allow for data regarding three years of your Organization Revenue, Expenses, and Net Assets. If your request includes budget information for a specific program, you are required to enter your Program Revenue and Expenses here as well.

3. To add separate revenue line items (both organization and program): in the revenue portion of this screen, press the + button, to add as many revenue rows needed.

4. Once you've added a row, you will see a drop down under the "Type of Revenue" column. Select the type of revenue you plan to complete with a total figure each column that references Last Year/Current Year/Next Year for each cell.

   If needed, click "+" for additional type of revenue. Please note: if your organization does not have a certain type of revenue, you do not need to add a zero for all references to Last Year/Current Year/Next Year.

5. After you've entered your revenue information, move on to enter your expenses.

6. You will not need to enter any surplus/deficit information. Our system will auto-populate that information based on your prior entries.

7. Please enter your net asset information.

8. If appropriate, enter your revenue information for the program you are submitting this application. To see how to enter the revenue rows, go back to step 3.

9. Once you've entered all the organization budget information, and program budget information (if applicable), click "save" at the bottom of the page. You can also click "clear" if you need to start over. To exit out of this screen, click "close" or the "x" button at the top right.

10. You can now continue to fill out your application.