Budget Setup for Directors

Department Leader Documentation · https://docs.dacapoinventory.com/doc/budget-setup-for-directors/

Set shared budget categories and starting amounts so teachers track purchases the same way across the district.

Where to go

Budget Setup (Director menu)

Set up categories and amounts

1. Open Budget Setup.
2. Define or adjust **district-wide categories** (these affect all teachers).
3. Set starting amounts by teacher/building as your process requires.
4. Use **View & Add Budget Items** (opens the director budget ledger for that teacher) when you need to enter or review purchases on their behalf.

Teacher side

Teachers record day-to-day encumbrances under **Your Budget**. Point them there after categories exist so May balances are trustworthy.