Your Budget — Track Program Purchases

Financials & Trips · https://docs.dacapoinventory.com/doc/your-budget-track-program-purchases/

Your Budget helps you plan and record purchases for the school year so you always know what you have left to spend.

Where to go

In the left menu, open **Your Budget**.

Directors may also use **Budget Setup** to set categories and starting amounts for teachers.

See your balance

1. Open Your Budget.
2. Confirm you are on the correct **school year** (use the year switcher if needed).
3. Review remaining balances by category.

Add a purchase

1. Choose **Add New Purchase** (available for the **current** school year).
2. Pick a category, amount, vendor or description, and date.
3. Save. Your remaining balance updates automatically.

You can edit or delete a purchase later if something changes.

Budget settings (teachers)

From Your Budget, open **Budget Settings** when available to:

- Review **categories** (these are usually district-wide so everyone speaks the same language).
- Set or adjust your **starting amounts** (often auto-saved as you type).

- Optionally **share a view-only** look at your budget with colleagues.

Tips that keep things calm in May

- Log purchases when you order — not only when the box arrives.
- Use clear descriptions (“reed order – spring”) so your future self understands the ledger.
- Switch school years carefully before comparing balances.

If categories or district totals look wrong, ask your music director — they manage setup in Budget Setup.