Collective budget

General information

Collective budgets are intended for groups that work together. For the sake of simplicity, we ask collectives to select a budget manager. More info below. **Employment is not possible via collective budgets**, but it is possible to make budget transfers to the personal budgets of the members of the collective and create employment there.

> Please note that at Smart all users have equal rights and even if you carry out orders for each other, all users manage their own personal budgets, which others have no insight into.

Add collective budget

Go to Budgets and + New collective budget

Select a name for the collective budget in the form and whether the budget should be created in SMartAt e. Gen. or smart@work GmbH. If you have any questions, the smart team will be happy to help.

> A collective budget must have at least one member in addition to you in order to be created. To select additional users, you need the user number in the format AT-U{four-digit number}, e.g. AT-U0001. Please clarify your joint project with the other users before creating the budget.

You can then **check** whether you have entered the correct person and add them. You can add further budget members now, or do so at a later date.

To complete the process, click on "Create budget".

> The newly added Bugdet members will receive an e-mail with a **confirmation link**. As soon as a member has confirmed the link, the new budget is created.

Create orders

As soon as a member has confirmed the collective budget, you can create your first orders. Simply select the collective budget in the order form under Budget.

Roles in the collective budget:

A collective budget has **1 budget manager** and 1 or more members.

The budget manager can manage members, create orders, submit expenses and add budget transfers.

The members can view the budget but cannot manage it. The roles can be managed in the portal by the budget manager.

Manage members of the collective:

Click on the budget and open the list of members. Here you can add and delete members and change the budget manager.

Change budget manager

As a budget manager, you can select another member of the collective as budget manager at any time. The new budget manager will receive an email to confirm this.

> Only 1 member can have the role of **budget manager** in the collective.

After confirmation, a notification appears.

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