

How to Import Budget

The following will guide you on how to import budget information.

Import Full Year Budget

a. Say here is the csv file you want to import.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	40000	1000	A	1500	1500	1500	1500	1500	1500	1500	1500	1500	1500	1500	1500	
2	50000	1000	A	600	600	600	600	600	600	600	600	600	600	600	600	
3																

- b. Create a new budget record (See [How to Add new budget record](#)) or open a budget record (See [How to Search and Open budget record](#)) to where you want to import the above budget information.
- c. Click **Import**. The Import mini-screen will be opened. Say you will be importing a full year budget, check **Full Year** checkbox, browse for the csv file and click **OK**.

The screenshot shows the 'Budget - 2016 draft' window. The 'Import' button is highlighted in the top menu. An 'Import Budget' dialog box is open, showing 'Full Year' selected under 'Import Format' and a CSV file '2015_A_20160314_161314.csv' selected. The 'OK' button is highlighted.

d. Budget information will then be imported to the opened budget record.

The screenshot shows the 'Budget - 2016 draft' window after the import. The budget data is now visible in the table, with columns for each month from January 2016 to December 2016. The data for 'Sales Location A' and 'Purchases Default-Location...' is shown.

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