

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 in the top menu is highlighted with a red box. An 'Import Budget' dialog box is open, showing the 'Details' tab. The 'Import Format' section has the 'Full Year' checkbox checked and highlighted with a red box. The 'Please select the CSV file to import:' section shows a text field with the file path '2015_A_20160314_161314.csv' and a 'Browse' button. The 'OK' button is also highlighted with a red box.

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

The screenshot shows the 'Budget - 2016 draft' window after the budget information has been imported. The table now displays data for the full year, from January 2016 to December 2016. The 'Account ID' column shows '40000-1000' and '50000-1000'. The 'Description' column shows 'Sales Location A' and 'Purchases Default-Location...'. The 'January 2016' through 'December 2016' columns show the budget amounts for each month.

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3. 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**.

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