






# Importing Budgets into Quickbooks

**First** – ensure your calendar is set to run from Feb to Jan.





Click on gear at top right and select Account and Settings then Advanced:

Account and Settings ? Help >

Company	Company name			
Usage	Company name	MWR Units		
Payments	Legal name	Same as company name		
QuickBooks Che...	-			
Sales	Company type	Tax form	Corporation, one or more shareholders (Form 1120)	
Expenses	Industry		All other traveler accommodation	
Time	Contact info	Company email	wendy.andrews@gexchange.org	
Advanced		Customer-facing email	Same as company email	
		Company phone	+17575720189	
		Website	-	
	Address	Company address	510 Independence Pkwy, Chesapeake, VA 23320	

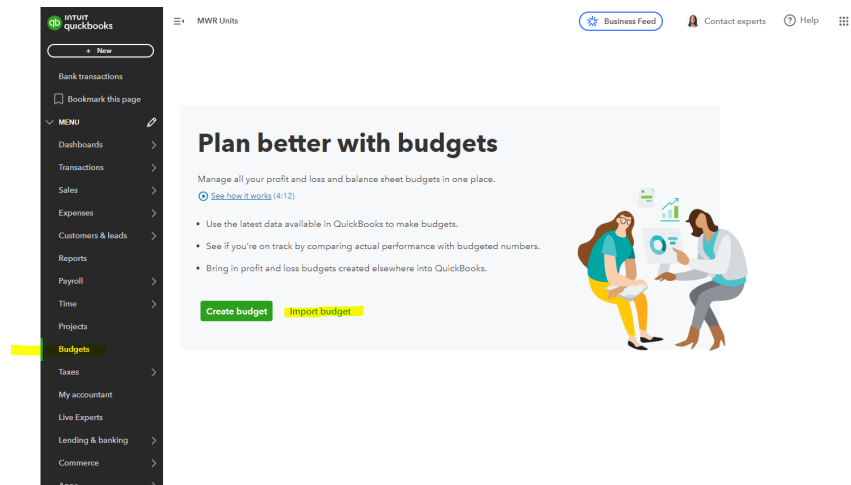
Ensure that First month of fiscal year is February

Account and Settings ? Help ×

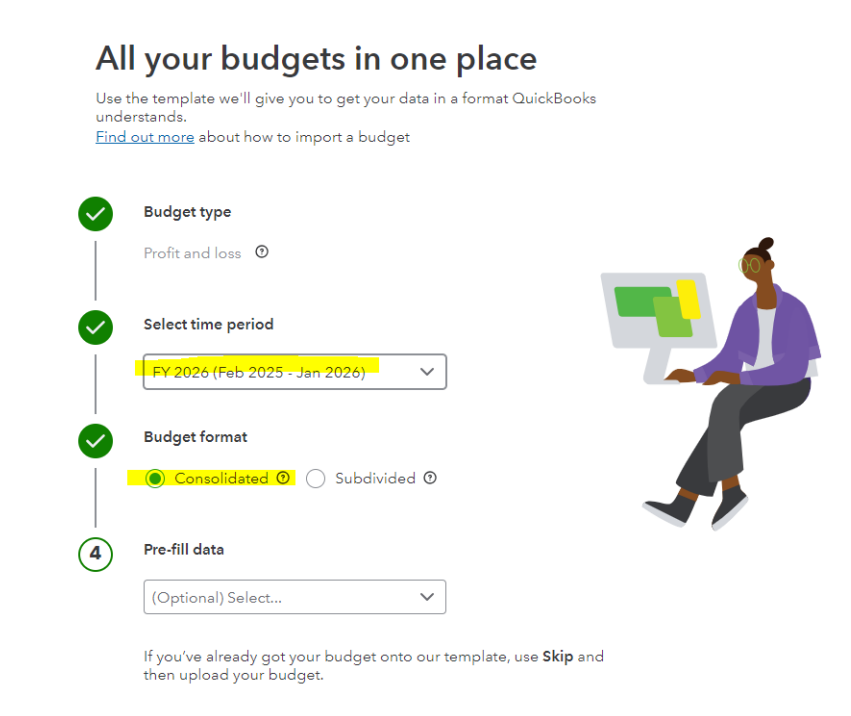
Company	Accounting		<b>First month of fiscal year</b>	<b>February</b>	
Usage		First month of income tax year		Same as fiscal year	
Payments		Accounting method <span>?</span>		Accrual	
QuickBooks Checking		Close the books <span>?</span>		Off	
Sales	Company type	Tax form		Corporation, one or more shareholders (Form 1120)	
Expenses	Chart of accounts	Enable account numbers		On	
Time		Tips account		Enter Text	
Advanced		Billable expense income account		Billable Expense Income	
	Categories	Track classes		Off	

If it is not, click on the pencil to the far right in the accounting section to edit as needed. Be sure to close out of the settings menu when you are done.

Next – click on budgets from the menu then click on Import Budget:



Select time period and Consolidated Budget Format:



If you would like to use current or prior year activity as a budget guide, use the drop down in step 4 to select the year you want to use:

## All your budgets in one place

Use the template we'll give you to get your data in a format QuickBooks understands.


[Find out more](#) about how to import a budget

✓ **Budget type**  
Profit and loss ⓘ

✓ **Select time period**

4

FY 2026 (Feb 2025 - Jan 2026) ▼  
Actuals 2025 (YTD)  
**Actuals 2024**  
Actuals 2023  
Actuals 2022  
Actuals 2021  
(Optional) Select... ▼



If you've already got your budget onto our template, use **Skip** and then upload your budget.

Then click next in bottom right corner:

## All your budgets in one place

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[Find out more](#) about how to import a budget

✓ **Budget type**  
Profit and loss ⓘ

✓ **Select time period**  
FY 2026 (Feb 2025 - Jan 2026) ▼

✓ **Budget format**  
 Consolidated ⓘ  Subdivided ⓘ

✓ **Pre-fill data**  
Actuals 2024 ▼ [Clear](#)



If you've already got your budget onto our template, use **Skip** and then upload your budget.

Skip

Next

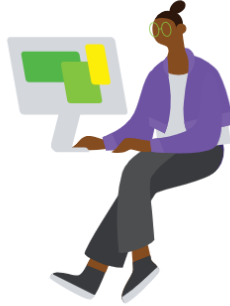
Click on the P&L budget template link to open the excel worksheet:

## All your budgets in one place

Use the template we'll give you to get your data in a format QuickBooks understands.

[Find out more](#) about how to import a budget

- ✓ Download budget template  
P&L budget\_template.xlsx
- 2 Upload the budget



The first tab of the worksheet gives a few dos and don'ts, and the second tab is where you can review/edit/enter data:

Company name	IMWR Units
Budget name	Budget_FY26_P&L
Budget type	Profit and loss
Period	FY 2026 (Feb 2025 - Jan 2026)

Use this template to get your data into a format QuickBooks understands.	
QuickBooks uses the budget details on this sheet to read budget type, timeline, categories, and so on. When you update this info and s	
* Do not change the sheet names.	
* Do not change the row or column labels. Rows with invalid entries will be ignored during upload.	
* Leave unwanted columns or rows blank. You can edit the budget in QuickBooks once the upload is complete.	
* Add columns only at the end and not in between.	
* You can add or remove rows as needed.	
* The accounts you see in the template are taken from the company chart of accounts to which you want to import your budget.	
* You can format the template, rename your budget, and add in numbers and formulas.	
* Enter cell values only between -99,999,999,999 and +99,999,999,999	

<	>	Guidelines	Consolidated	+	⋮
---	---	------------	--------------	---	---

If you selected prefill data from a prior year, you will see that information in the worksheet. You can edit the data as needed. Just do not add/delete columns or rows.

Consolidated	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan
Accounts												
Income												
PET 24110 Special Event Advance Ticket Sales												
PET 24120 Other Unearned Income												
PET 40001.01 TRP Food Sales												
PET 40001.02 Club Food Sales												
PET 40001.031 Movie Theater Candy Sales												
PET 40001.032 Movie Theater Popcorn Sales												
PET 40002 Alcohol Sales	4000	4500	6000	5500	6000	4500	4000	4500	6000	5500	6000	4500
PET 40002.011 Alcohol Sales Bottled Beer												
PET 40002.012 Alcohol Sales Draft Beer												
PET 40002.02 Alcohol Sales Liquor												
PET 40002.03 Alcohol Sales Wine												
PET 40003.01 TRP Beverage Sales												
PET 40003.02 Club Beverage Sales												
PET 40003.03 Theater Beverage Sales												
PET 40004 Resale Ticket Sales	60000	60000	60000	60000	60000	60000	60000	60000	60000	60000	60000	60000
PET 40005 Lodging Income	80000	80000	80000	80000	80000	80000	80000	80000	80000	80000	80000	80000

Once you have entered all the information, save the excel template in a folder that is easily accessed.

Return to Quickbooks and click on upload budget, browse for the excel file that you completed and saved in the prior step then click next in the bottom right:

### All your budgets in one place

Use the template we'll give you to get your data in a format QuickBooks understands. [Find out more](#) about how to import a budget


✔ Download budget template

[P&L budget\\_template.xlsx](#)

2 Upload the budget

P&L budget\_sample (?).xls

Upload budget



Back

Next

Once import is complete, click on 'view budget':

The screenshot shows the 'Budget\_FY26\_P&L' interface. At the top, the 'Period' is set to 'FY 2026 (Feb 2025 - Jan 2026)' and 'Reference data' is set to 'Actuals 2025 (YTD)'. A modal dialog is centered on the screen with the title 'Budget created successfully'. The dialog contains the text 'Sit back while we make sure all your data comes in correctly.' and a progress bar labeled '1 of 1'. Below the progress bar are two buttons: 'Cancel import' and 'View budget'. The background shows a table with columns for 'Actuals 2025 (YTD)', 'Budget totals', and months from Feb 2025 to Dec 2025. The table lists various accounts under 'Income', such as 'PET 24110 Special Event ...' and 'PET 40002 Alcohol Sales'.

If any edits are needed, they can be done on this screen, be sure to click save on bottom right if you make any changes.

The screenshot shows the 'Budget\_FY26\_P&L' interface with the modal dialog removed. The 'Period' is 'FY 2026 (Feb 2025 - Jan 2026)' and 'Reference data' is 'Actuals 2025 (YTD)'. The table now displays data for the months of Feb 2025 through Dec 2025. The 'Actuals 2025 (YTD)' column shows values for each account, and the 'Budget totals' column shows values for Feb 2025 and Mar 2025. The 'Save' button is visible in the bottom right corner.

The budget can now be accessed by clicking on Budgets from the menu and then view/edit:

The screenshot displays the Intuit QuickBooks interface for the 'Budgets' section. On the left is a dark sidebar menu with 'Budgets' highlighted. The top navigation bar includes 'Business Feed', 'Contact experts', 'Help', and user profile icons. The main content area features a 'Business Feed' header with an 'Import budget' button and a 'Create budget' button. Below this is a notification banner for 'Import consolidated and subdivided budgets' with a 'See how it works' link. A toggle switch for 'Hide archived budgets' is present. A table lists the budget details:

<input type="checkbox"/>	Name ↕	Type	Last modified by	Actions
<input type="checkbox"/>	<b>Budget_FY26_P&amp;L</b> Feb 2025 - Jan 2026	Profit and loss	Wendy Andrews on 08/01/2024	<a href="#">View/Edit</a> ↓

At the bottom of the table, there are navigation links: '< Previous 1 - 1 Next >'.