QuickBooks – Entering a Budget

This is a larger process (see Budgeting), but here is the practical information on entering a budget into QuickBooks. (For accessing old budgets, see Basic Reports)

Under the **Company** menu, find **Planning & Budgeting**, and click on **Set Up Budgets**. A copy of your most recent budget will be displayed (so that you do not write over an existing current budget).
Click the ‘Create New Budget’ button, and the following menu will appear:
Make sure to select the correct year for your new budget, and specify a Profit and Loss budget. If you wish to edit your existing budget, simply specify the current year. The next two windows should already be filled in appropriately:

You will now come to the budget entry page. Simply add the budget you have prepared month by month into the provided form. You can navigate via the Tab key, or just clicking on the item you want to enter.
*Note* If you press the Enter key, the budget will save and close, so remember to navigate with Tab, arrow keys, or the mouse. If you press Clear, the entire budget will be cleared, so be careful.

Once everything is entered to your satisfaction, click Save. See above for editing instructions.