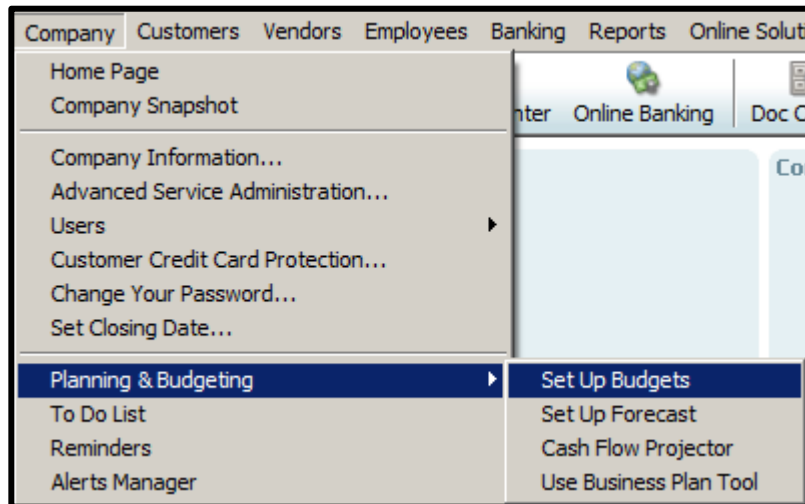


QuickBooks – Entering a Budget

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).

Set Up Budgets

Budget: FY2009-10 - Profit & Loss by Account

Create New Budget

Account	Annual Total	J..	A..	Sep09	Oct09	N..	D..	J..	F..	M.	A..	Ma...	Jun10
Revenues													
652100 Cash Food Sales	-2,620.57			-94.70	-2,52...								
657000 Tips/Donations													
695300 UCard	-3,319.64			-180.30	-3,13...								
699901 Catering													
699905 YCMP	-1,368.17			-79.20	-1,28...								
734300 Copying Expense													
CC Payroll Category													
730015 Student Payroll	-3,884.99			-1,95...	-1,92...								
EE Administrative Expense													
734200 Office Supplies													
734500 Postage													
734700 Telephone Equi...	-39.00				-39.00								
735010 Membership Du...	-75.00				-75.00								
735600 Fees, Fines, Lic...													
735620 2% UCard Servi...													
FF Facility Operational Ex...													
739190 Food for Resale	-6,308.20			-3,61...	-2,69...								

Copy Across Adjust Row Amounts Clear Save OK Cancel Help

Click the 'Create New Budget' button, and the following menu will appear:

Create New Budget

Create a New Budget

Begin by specifying the year and type for the new budget.


2015-16


Choose the budget type

Profit and Loss (reflects all activity for the year)

Balance Sheet (reflects ending balance)

Back **Next** Finish Cancel

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 , the entire budget will be cleared, so be careful.

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