Budget Imports
Settings > Budgeting > New Budget Import Format

This is for importing budgets from outside systems into SGA.

Name: The name that will be displayed as the name of the import.

Connection string: A string of text that specifies the information needed to establish a connection between the software and a data source, such as a database file or external service. It acts like a set of instructions or a **key** that tells the software to locate and access the data it needs to import.

General

Reference columns by: Determines how the columns in your data are identified during the import process.

- **Reference by Name:** This means you use the column header or the name of the column to reference data.
- **Reference by Number:** This means you reference columns based on their position or index within the dataset. So, instead of using the column name, you refer to the column by its numerical position.

Budget amounts stored: Specify if the budget amount columns are stored horizontally (one column for each month) or vertically (one column with an extra column to determine the period).

Create accounts that don't exist: The imported budget must be valid. If you wish to create an account that doesn't exist, check this. All added accounts will be marked as active.

True sign: Check this if revenue budgets are negative. If you are budgeting everything as a positive number, leave this unchecked.

Columns

Account: The column where the G/L account resides.

Period: This is the column where the period or month is located. If you do not specify a period, the budget will be allocated for the first period.

Period format: Defines the format in which the period is stored.

Budget(s): The column where the budget amount resides. If amounts are stored horizontally, then you must specify the column for every month. If the amounts are stored vertically, select the one budget column.

Comments: This is optional. You can specify a comments column unique to the account and budget year.

Importing Specifications

- Components cannot be imported. See Budget Components Imports here.

- Blank rows are not allowed.

- Any blank cells will be filled in with zeros during the import process.

- Any error that occurs will be displayed in an error log. You can fix it in the data source, save it again, and re-import it if necessary.

- The account must be on the first budget line of a budgeted account. If not, budgeting will be assumed for the last account specified in the rows above.

- The account must have dashes.

- If an account is not found, budgets for that account will be skipped.

- To import specific months, designate these months on the columns tab, leaving the rest blank. (Horizontal setup only)

- To import comments, leave month totals alone and specify only comments on the columns tab. (Horizontal setup only).