

14.06. Importing customer budgets

You can set up budgets for customers manually if you wish (see [here](#)) but if you have to set budgets for many customers at a time then this feature will save you a lot of time. As with the other import features of mSupply, this import uses a tab delimited text file (easily produced by exporting a spreadsheet from Excel or other spreadsheet programme). The columns that must be present in the file and their contents are as follows:

Column number	Column letter	Field	Description
1	A	budget description	The description for the budget, as it will appear in the list of budgets for a customer.
2	B	customer code	The customer's code as entered in mSupply. If this code does not match a customer in mSupply an error will be generated.
3	C	customer name	For your reference only. This column is ignored during the import and can be left empty, but it must be present.
4	D	budget period start date	The start date for the period to which the budget belongs in the format dd/mm/yyyy or mm/dd/yyyy (whichever your copy of mSupply is using).
5	E	budget period end date	The end date for the period to which the budget belongs in the format dd/mm/yyyy or mm/dd/yyyy (whichever your copy of mSupply is using). The budget period start and end dates must match an existing budget period period in mSupply (set up using Budgets), otherwise an error will be generated.
6	F	budget amount	The amount of the budget. Must be a positive number with or without a decimal point.
7	G	additional budget	Whether the budget amount is to be considered an additional budget. A "T" or "Y" is interpreted as true, anything else is interpreted as false.
8	H	effective budget date	The effective date for an additional budget in the format dd/mm/yyyy or mm/dd/yyyy (whichever your copy of mSupply is using). Ignored if the budget is not additional. If this field is left blank and the budget is additional then the current date is used.

When you have created the import text file go to **File > Import > Import customer budgets** and select your text file. You will be show the following window:

From:

<https://docs.msupply.org.nz/> - **mSupply documentation wiki**

Permanent link:

https://docs.msupply.org.nz/import_and_export:importing_customer_budgets?rev=1572282453

Last update: **2019/10/28 17:07**

