

BUDGETA

Exporting a budget to Sage-Intacct

Learn how to export a budget using the Budgeta-Intacct integration



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Want to join our Sage-Intacct beta? Please contact us! support@budgeta.com

To export your budget from Budgeta to Intacct, first click on the Intacct icon on the Budgeta menu:

Current budget	Monthly	USD	All departments	All geographies	All categories	Numbers	JAN 2016	FEB 2016	MAR 2016	APR 2016	MAY 2016	JUN 2016	JUL 2016	AUG 2016	SEP 2016	OCT 2016	NOV 2016	TOTAL
Cash Received							\$90,222	\$206,844	\$273,148	\$238,376	\$250,111	\$311,780	\$304,038	\$379,220	\$384,669	\$362,464	\$382,998	\$1,724,887
License and support - US							\$11,000	\$11,000	\$11,000	\$11,000	\$11,000	\$11,000	\$11,000	\$11,000	\$11,000	\$11,000	\$11,000	\$76,800
License and support - EMEA							-	-	\$48,889	-	-	\$48,889	-	-	\$48,889	-	-	\$40,711
Subscription - US							\$132,000	\$147,675	\$164,717	\$173,901	\$184,610	\$196,336	\$224,179	\$238,248	\$252,666	\$278,065	\$296,993	\$930,724
Subscription - EMEA							\$22,222	\$23,544	\$22,877	\$26,552	\$26,905	\$27,369	\$30,867	\$40,254	\$46,054	\$42,977	\$42,603	\$1,073,537
Professional services - Worldwide							\$25,000	\$25,625	\$26,266	\$26,922	\$27,595	\$28,285	\$28,992	\$29,717	\$30,460	\$31,222	\$32,002	\$808,726
Cost of Revenues							(\$16,630)	(\$16,928)	(\$15,594)	(\$16,080)	(\$16,698)	(\$17,247)	(\$18,245)	(\$19,235)	(\$19,900)	(\$20,817)	(\$21,612)	(\$586,356)

Sign in, using your Intacct credentials, and click next:

Sign in to Intacct

Company ID

User ID

Password

Cancel Next

Select "Export your budget" and click next:

What would you like to do?

Import actuals

Export your budget

Cancel **Next**

Enter a budget ID and a description. Select whether you'd like to set the budget as the default in Intacct, and click next:

Intacct budget setup

Intacct Budget ID

Description

Set as default budget in Intacct

< Back Cancel **Next**

Select which financial data you'd like to import, time periods, and click next:

Select data to export

Select financial reports:

Profit & Loss Balance Sheet

Select time periods:

Months Quarters Years

[← Back](#) [Cancel](#) [Next](#)

If any of your budget lines are missing an account ID, you will be asked to select one for them, from a drop down menu of your accounts in Intacct. Then, click next:

Missing Profit & Loss accounts

Please select an account for the following budget lines:

Marketing Ops	Select single or multiple accounts
Marketing / Outside ...	Select single or multiple accounts
Sales / Salary & wag...	Select single or multiple accounts
Sales / Salary & wag...	Select single or multiple accounts
Customer Success / ...	
Customer Success / ...	
Customer Success / ...	
People / Salary & wa...	
People / Salary & wa...	
Admin / Salary & wa...	Select single or multiple accounts
Admin / Salary & wa...	Select single or multiple accounts
Admin / Salary & wa...	Select single or multiple accounts

4000 - Sales

4003 - Management Fees

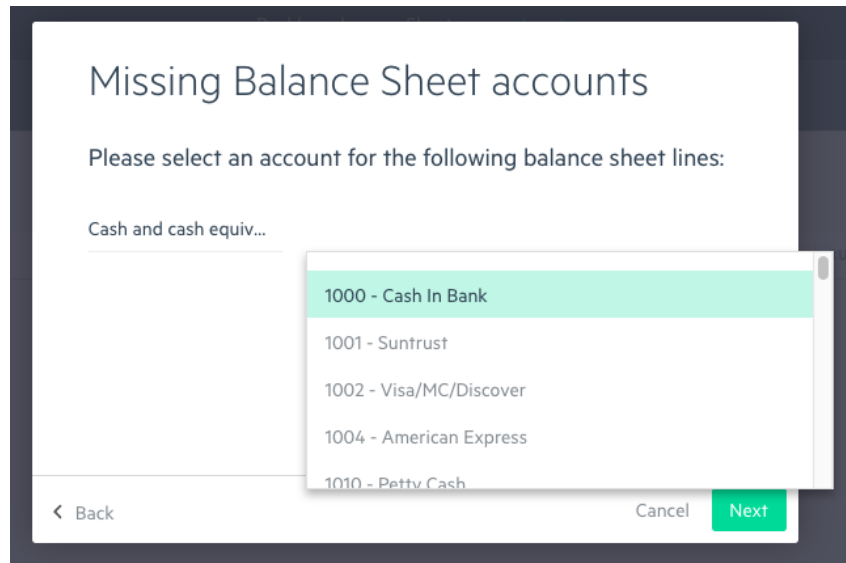
4005 - Billing Revenue

4006 - Revenue in Excess of EIV

4008 - Sales- Alarm Accessories

[← Back](#) [Cancel](#) [Next](#)

If you selected to export your balance sheet budget, you may be asked to select an account for those lines as well:



Click next and you're done! You can now go back to Budgeteta or continue to Intacct and use the budget data you exported.