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FSSU
Training
video

Importing the
Budget into
SURF

FSSU Guide & Training video for importing Budget figures into SURF

Overview of the process of importing budget figures into SURF

- Previously the process of importing the budget involved manual inputting & adjusting of the budget excel sheets
- The FSSU aim to improve the efficiency of the school accounts preparation process and reduce such manual work

- The C&C Budget template has a new Sheet No 7 which prepopulates a summary of the nominal codes and the total budget figure for each code in a liner format

- This format will enable the data in Column A & C to be copied quickly into a Budget Import template which can be imported efficiently into the accounts package

- The full instructions for importing the budget is available for download within the new sheet

Video Demonstration for importing budget

1. Open the final *BOM approved* budget file for the financial year

   Print out a hard copy of the Income & Expenditure Budget from sheet 2
   Review printout for codes (with budget values) that may not be in SURF
   Add new codes to the chart of accounts in SURF before importing
   Download the import instructions from sheet 7
   Review figures in sheet 7 to ensure they have populated correctly

2. Download & save the Monthly Budget Format template from SURF

3. Copy columns A & C from sheet 7 to this template

4. Verify the Financial Year in SURF
   Import this updated budget template into SURF for the relevant period

5. Check & edit if necessary the budget figures in SURF

Conclusion – Key learning points

❑Download & Follow the steps in the FSSU Budget Import guide

❑If there are nominal codes with budget values in the budget template not in SURF those codes will not import into the account's software

❑Such codes should be added to SURF preferably before the importing the budget

❑ Awareness of what Financial Year SURF is in is important when selecting the period for importing the budget figures

❑Check figures in SURF for accuracy after importing

❑The budget figures can be easily amended in SURF

Thank You

Check out more short videos in the SURF training section of the website

Email info@fssu.ie if there is a specific topic you would like covered