Project Budget Sheet:
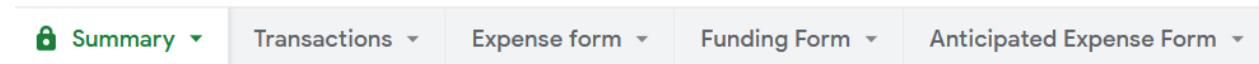
This workbook contains 5 sheets: Summary, Transactions, Expense Form, Funding Form, and Anticipated Expense form.

🔒 Summary ▾	Transactions ▾	Expense form ▾	Funding Form ▾	Anticipated Expense Form ▾

The last 3 of those are linked to 3 corresponding workbooks generated from Google Forms. By filling out those Google Forms data is added to the project budget workbook.
Changing the name of the project on the summary page as shown below will change which project is being viewed in the workbook.

Expense For

GET STARTED

Set your starting balance in cell L8, then customize your categories and planned spending amounts in the 'Income' and 'Expenses' tables below.
As you enter data in the google forms, this sheet will automatically update to show a summary of your spending for the month.

NOTE

Only edit highlighted cells.

Try not to alter cells that contain a formula.

Project Budget for: Agenda 2063 (3rd edition)   **Starting balance:** dh10,000.0

The same set of google forms are used for every project to keep things simple. This project workbook template can be copied for each project. If you modify the categories in the Google Forms you must also modify the categories in the workbook. The items which are meant to be modified are highlighted in yellow.

Expenses

	Planned	Actual	Diff.
Totals	dh0.00	dh0.00	dh0.00
Printing and Communic	dh0.00	dh0.00	dh0.00
Hotel and Accomodatio	dh0.00	dh0.00	dh0.00
Meals	dh0.00	dh0.00	dh0.00
Flights	dh0.00	dh0.00	dh0.00
Other Transportation	dh0.00	dh0.00	dh0.00

Funding

	Planned	Actual	Diff.
Totals	dh0.00	dh0.00	dh0.00
Sponsor Organization	dh0.00	dh0.00	dh0.00
Partner Organization	dh0.00	dh0.00	dh0.00
Personal Donation	dh0.00	dh0.00	dh0.00

If you would like to manually add financial info you must do this in the Excel spreadsheets located with their corresponding Google Forms.

Annual Budget Sheet:

This workbook contains 6 sheets: Setup, Expenses, Income, Summary, Funding Form, and Expense Form.

Setup ▾	Expenses ▾	Income ▾	🔒 Summary ▾	Funding Form ▾	Expense Form ▾
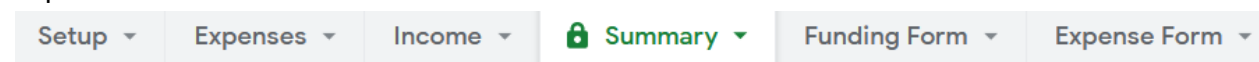
The last 2 of those are linked to 2 corresponding workbooks generated from Google Forms. By

filling out those Google Forms data is added to the project budget workbook. Changing the year on the setup page as shown below will change what year the expenses, income, and summary pages are showing. You can also change the starting balance on the setup page below depending on how much money you started with.

	A	B	C	D	E	F
1						
2		**Annual budget tracker**	**Year: 2022**			
3		*Plan and track your monthly spending for the entire year.*				
4						
5						
6		**How to use this template**				
7		1. Get started by entering your starting balance in Row 13 below. This does not include any money aquired by donations.				
8		2. Expenses and Income tabs are automatically filled in from the financial google forms				
9		3. If you edit the catagories in the google forms you will have to edit the corresponding catagories on the expenses and income tabs				
10						
11						
12		**Configure**				
13		**Starting balance:** dh5,000.00				
14						

Add 1000 more rows at bottom.

The expenses tab will show your expenses for the year. The income tab will show your income from the year. If you alter the categories in these tabs you must also alter the categories to correspond in the Google Forms. The summary tab shows you a yearly summary of your financials. You should not need to edit anything on the last 3 tabs.
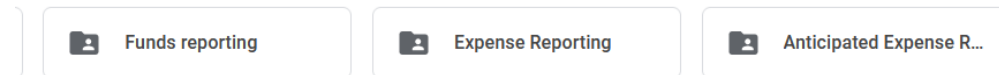If you would like to manually add financial info you must do this in the Excel spreadsheets located with their corresponding Google Forms.

Helpful tips:

Any time you are going to use these templates it should always be a copy so that you preserve the originals. Once you make a copy you should be able to move it to any folder or rename it and still have everything correctly linked to it.

Both of these workbooks should be very easy to use and you should not run into any issues. However, if you do run into an issue the best solution would be to start with a new copy of the original template (as that should never be altered in any way so that you do not lose a fully functioning copy of these documents).

If you would like to add an expense, expected expense, or funding, there are 2 options. You could fill out the corresponding Google Form included in the financials folder, or you could add it manually in the Google Sheet. To add it manually just open the Google Sheet with the same name as the Google Form. They both should be located in the same folder.
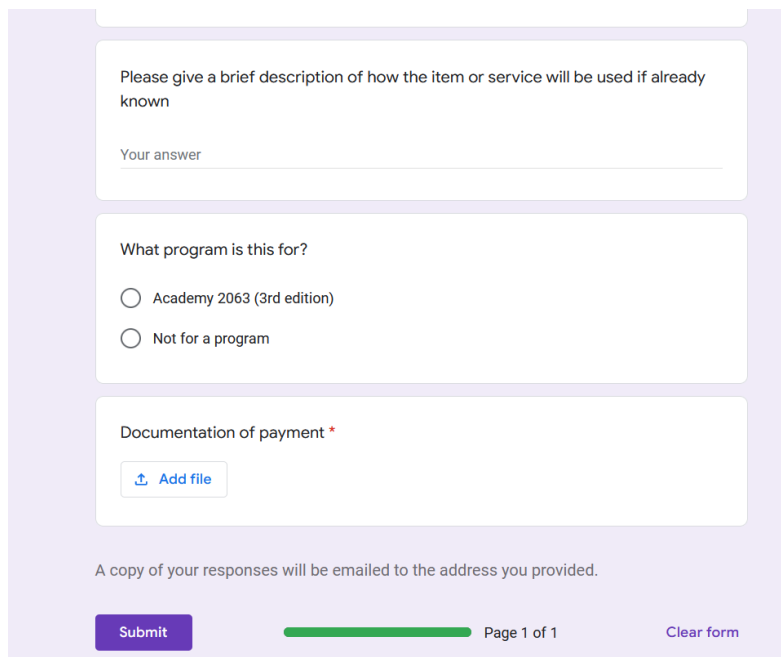
 You enter your response in the first open row at the bottom.

 This will not affect the Google Form responses as they will just continue below that row. The Google Form is quite simple as once you open it you just answer the questions and hit submit when you have finished.

Steps to access google forms:

Folders   Last modified ↓

| 📇 Mission and Vision | 📇 Method to Evaluate Pro... | 📇 Method to Manage Fin... |

Folders   Last modified ↓

| 📇 Archive | 📇 Funds reporting | 📇 Expense Reporting | 📇 Anticipated Expense R... |

Files

| Project and Annual Bu... | Project Budget Report ... | Annual budget | Project budget |

Folders   Last modified ↓
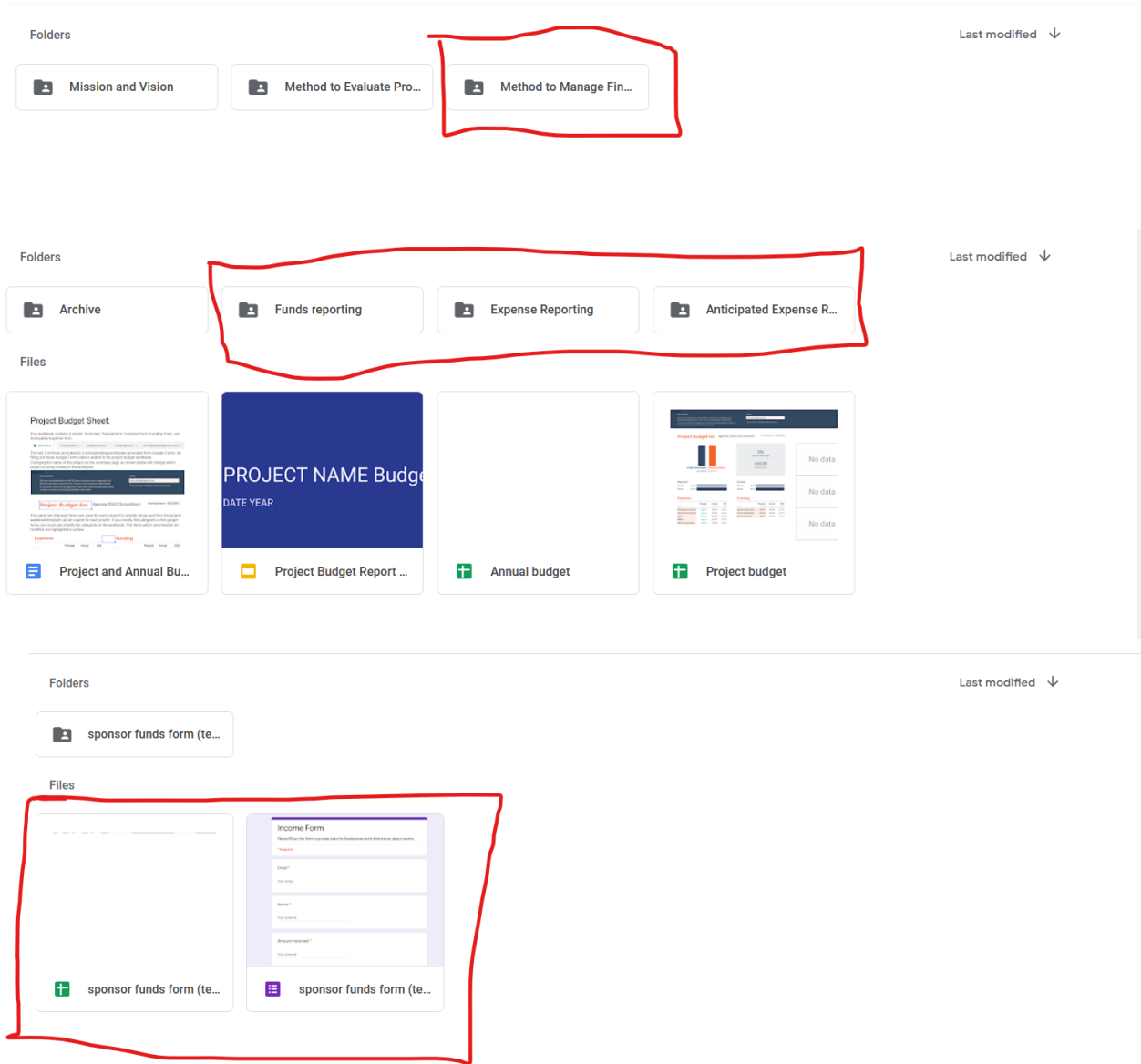
| 📇 sponsor funds form (te... |

Files

| sponsor funds form (te... | sponsor funds form (te... |

Steps to access Budget documents:

Folders

		Last modified ↓
📁 Mission and Vision	📁 Method to Evaluate Pro...	📁 Method to Manage Fin...

Folders

			Last modified ↓
📁 Archive	📁 Funds reporting	📁 Expense Reporting	📁 Anticipated Expense R...

Files

Project and Annual Bu...	Project Budget Report ...	Annual budget	Project budget