

Company Name

Step 1: Enter your business name on this page into cell B1 (right now it says "Company Name"). That's probably not the name of your business.

Step 2: Enter your full-year budget plans on the 'YearlyBudget' tab. This sheet is designed for top-down budgeting, so you'll start with annual goals and work down to monthly goals from there. On the 'Yearly' tab, you'll be able to add your own revenue and expense lines, depending on your business needs.

Step 3: Look at the 'MonthlyBudget' tab. You'll now have a monthly budget based on the numbers you entered on the 'Yearly' tab. By default, those yearly totals are broken out evenly over the year. You can change the weighting of each month by adjusting the value in the 'Percent of Total Year' line. Remember—your year needs to add up to 100%.

Note: Rent, utilities, insurance, and membership fees are all set to be divided equally throughout the year, regardless of how the rest of your costs are spread out.

Step 4: As each month goes by, open the 'MonthlyActuals' tab and enter your results.

Step 5: Check your progress on the 'Overview' tab. You can select the reporting month from a dropdown list, giving you the ability to see full year, year-to-date, and monthly results.

Step 6: Spend smarter, make more. Now that you've got a simple budget in place, you can take control of your business finances. Congrats!

Resources: [SBA - Calculate Your Startup Costs](#)
[SBA - Manage Your Finances](#)
[Inc. - How to Start a Business Budget](#)
[Score - How to Set Up and Maintain a Budget for Your Small Business](#)
[Capterra - 3 Signs You've Outgrown Excel](#)
[Capterra - How to Build Your First Budget](#)

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