

# Looker Studio Automated Budget Monitor

## Step-by-step Process

### Step 1: Open Google Sheets (Blank spreadsheet)

URL: <https://docs.google.com/spreadsheets>

### Step 2: Create Following Columns on Google Sheets. Make sure Date format is 'MM/DD/YY'

Account Name	Campaign Name	Label	Start Date	End Date	Planned Budget
NA	NA	NA	9/1/2024	9/30/2024	NA
NA	Brand Angebote 1	NA	9/1/2024	9/30/2024	NA
Performance DE - Adwords	NA	NA	9/1/2024	9/30/2024	NA
Performance DE - BingAds	NA	NA	9/1/2024	9/30/2024	NA
Always On Campaign - HMM - Male & Co	NA	Always On Performance Budget	9/1/2024	9/30/2024	NA
Male Germany - HMM - Male & Co	NA	Promo 125	9/1/2024	9/30/2024	NA

- Account Name
- Campaign Name
- Label
- Start Date
- End Date
- Planned Budget

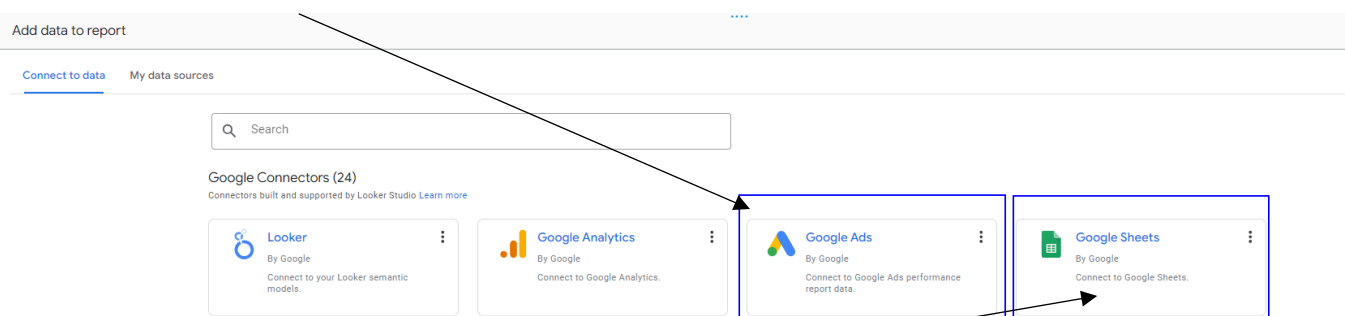
*(Refrain from renaming the columns to avoid confusions with formulas that we will create in the steps to follow. Even though you may not need Account Name/Campaign Name/Label but consider keeping all the columns and simply put NA where needed. Adding columns later is more time consuming)*

### Step 3: Open Looker Studio (Blank Report)

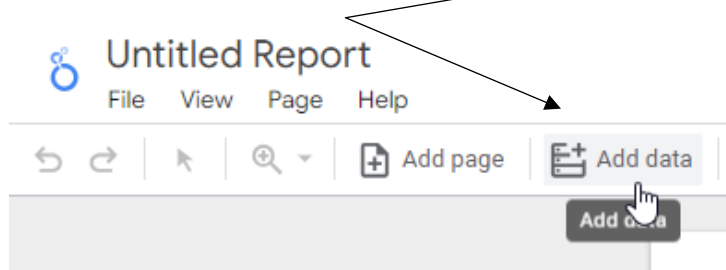
URL: <https://lookerstudio.google.com/navigation/reporting>

### Step 4: Adding Data Source to Looker Studio

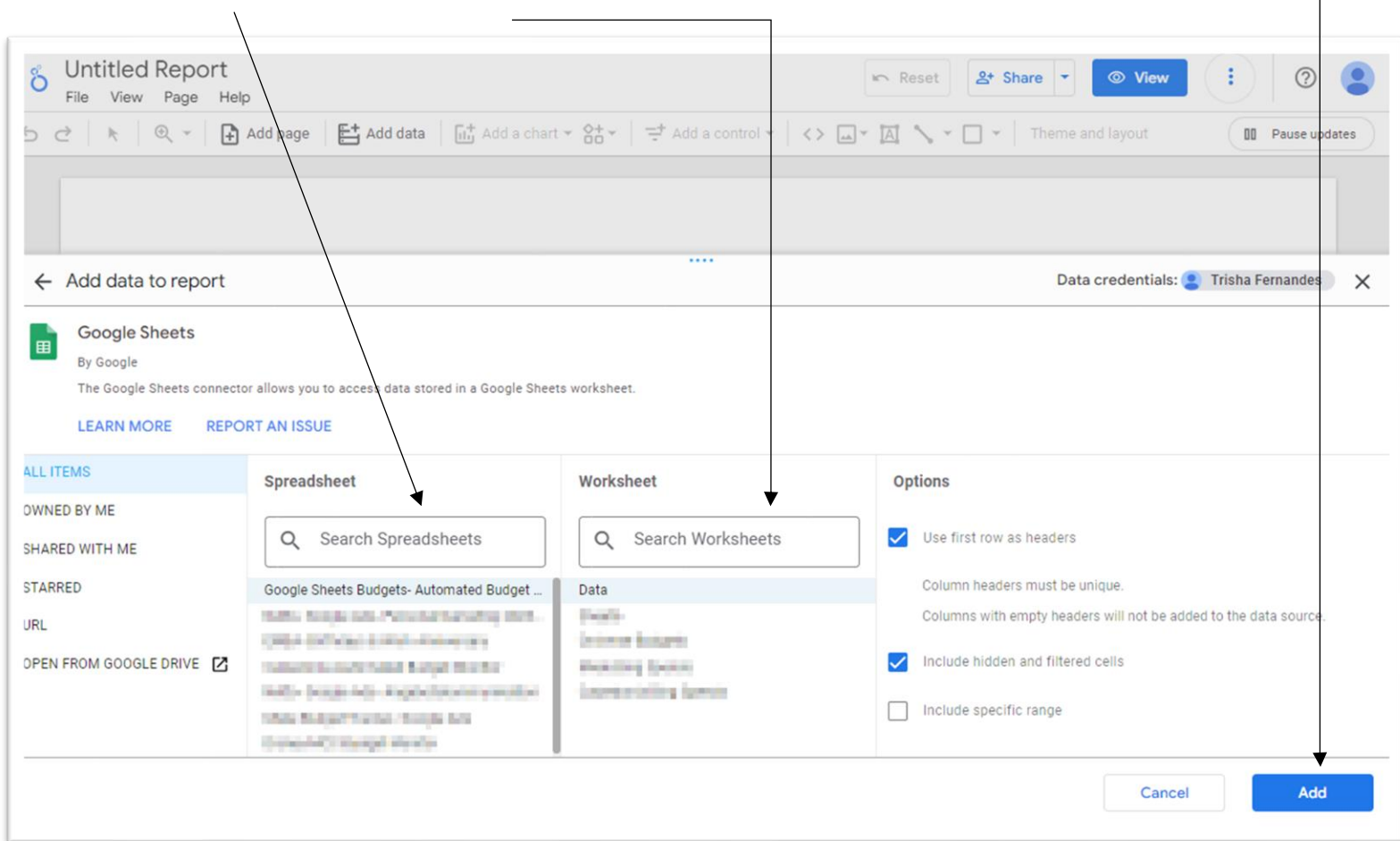
- Add Google Ads (or any other Google product)



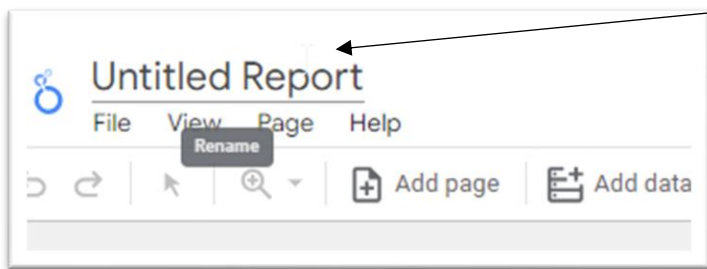
- Click Add Data & Add Google Sheets



Select the Spreadsheet → the Desired Worksheet → Click Add

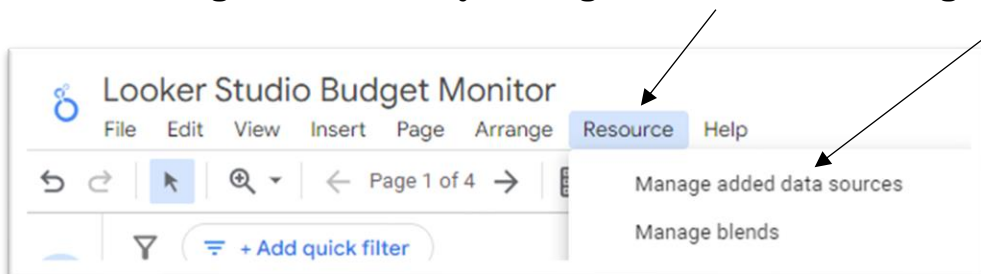


**Step 5:** Rename the Looker Studio Report. Click on 'Untitled Report' and rename it.



**Step 6:**

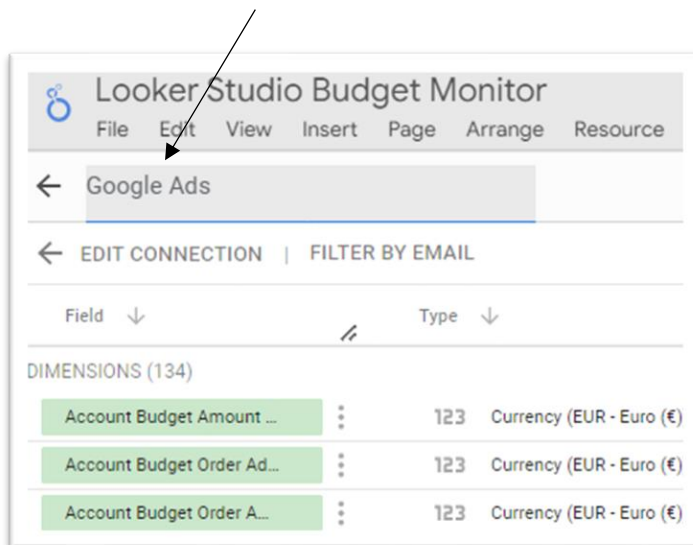
- Rename Google data Source by clicking on 'Resource' → 'Manage added data sources'



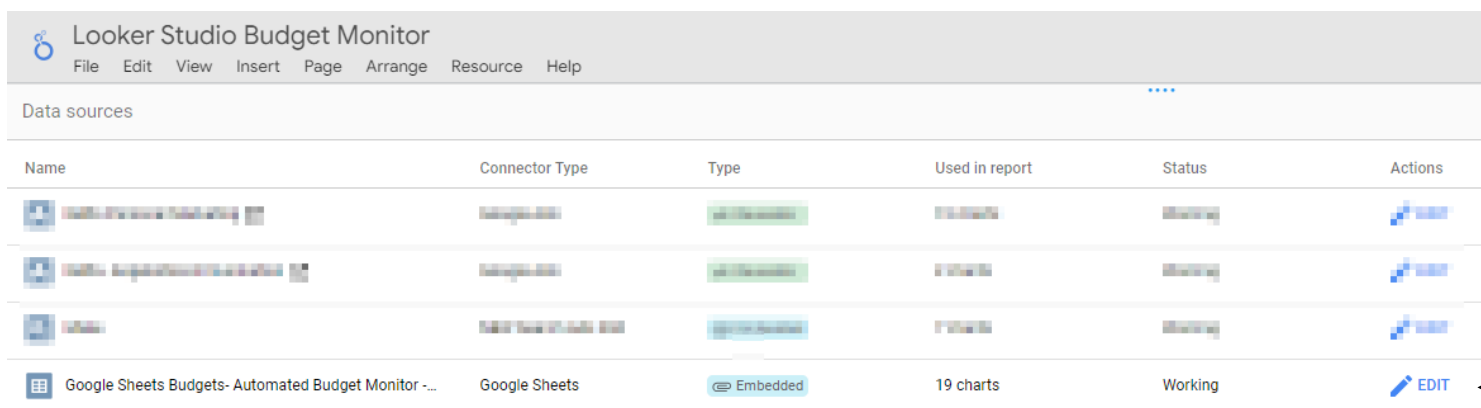
ii. Click on Edit



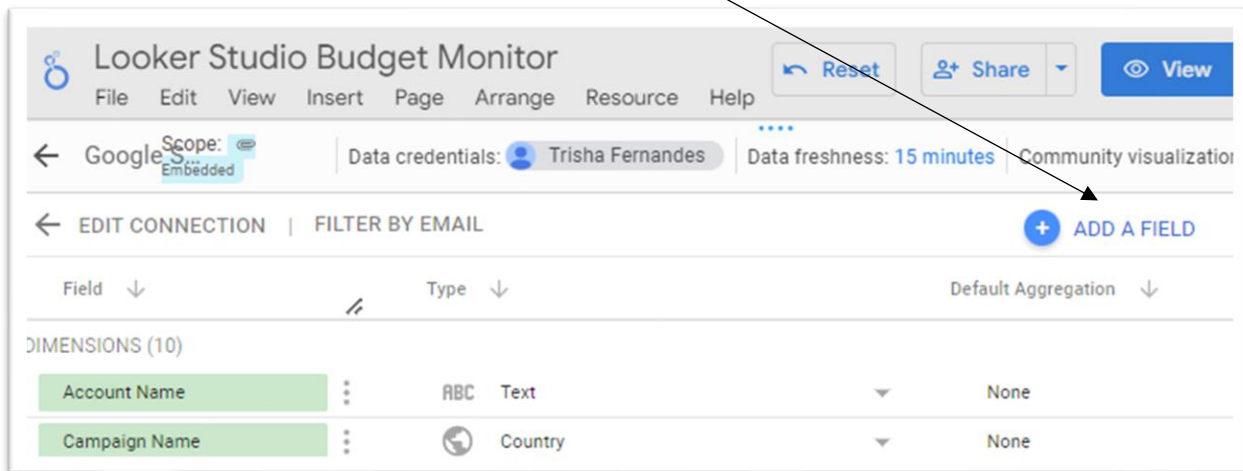
iii. Click on 'Google Ads' and Rename



**Step 7:** Click on Edit Google Sheets Data Source & Rename using the above steps



**Step 8:** Add Formulas by clicking 'ADD A FIELD' (within the Google Sheets Data that we added on Looker Studio)



- i. **Total Days**  
 $\text{DATE\_DIFF}(\text{End Date}, \text{Start Date}) + 1$
- ii. **Days Gone**  
 $\text{DATE\_DIFF}(\text{TODAY}(), \text{Start Date})$
- iii. **Days left**  
 $\text{Total Days} - \text{Days Gone}$
- iv. **Day Spend %**  
 $\text{Days Gone} / \text{Total Days}$

Below is how it would look

Field Name	Field ID
<div>e.g. New Calculated Field</div> <div>Total Days</div>	<div>Field Id</div> <div>calc_hrqb1tgld</div>
<div>Formula ?</div> <div>1 DATE_DIFF( End Date , Start Date )+1</div>	

Field Name	Field ID
<div>e.g. New Calculated Field</div> <div>Days Gone</div>	<div>Field Id</div> <div>calc_dq4oj2tgld</div>
<div>Formula ?</div> <div>1 DATE_DIFF(TODAY(), Start Date )</div>	

Field Name

e.g. New Calculated Field  
Days left

Field ID

Field Id  
calc\_w92g62tgld

Formula ?

1 Total Days - Days Gone

Field Name

e.g. New Calculated Field  
Day Spend %

Field ID

Field Id  
calc\_wl4843tgld

Formula ?

1 Days Gone / Total Days

When all 4 formulas added, click 'DONE'

Demo Looker Studio Budget Monitor

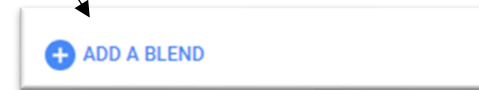
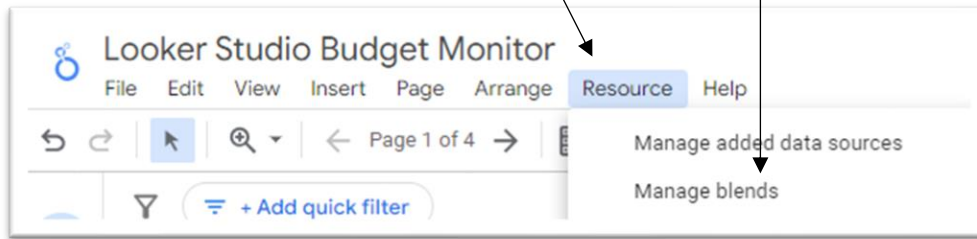
Reset Share View ? User

Demo Looker Studio Embedded
Data credentials: Trisha Fernandes
Data freshness: 12 hours
Community visualizations access: On
**DONE**

EDIT CONNECTION | FILTER BY EMAIL
ADD A FIELD ADD A PARAMETER

Field	Type	Default Aggregation	Search fields
DIMENSIONS (10)			
Account Name	ABC Text	None	
Campaign Name	Country	None	
Day Spend % <b>fx</b>	123 Percent	None	
Days Gone <b>fx</b>	123 Number	None	
Days left <b>fx</b>	123 Number	None	
End Date	Date	None	
Label	Country	None	
Planned Budget	123 Number	Sum	
Start Date	Date	None	
Total Days <b>fx</b>	123 Number	None	
METRICS (1)			
Record Count	123 Number	Auto	

**Step 9:** Blend Data by clicking 'Resource' → Manage blends → ADD A BLEND



*Assuming we need to monitor budgets on account level, add the following tables, dimensions and metrics*

**Add Table 1 → Google Ads Data Source**

**Dimensions:** Account name / description

**Metrics:** Cost

**Add Table 2 → Google Sheets**

**Dimensions:**

Account Name

Start Date

End Date

**Metrics:**

Planned Budget

Day Spend %

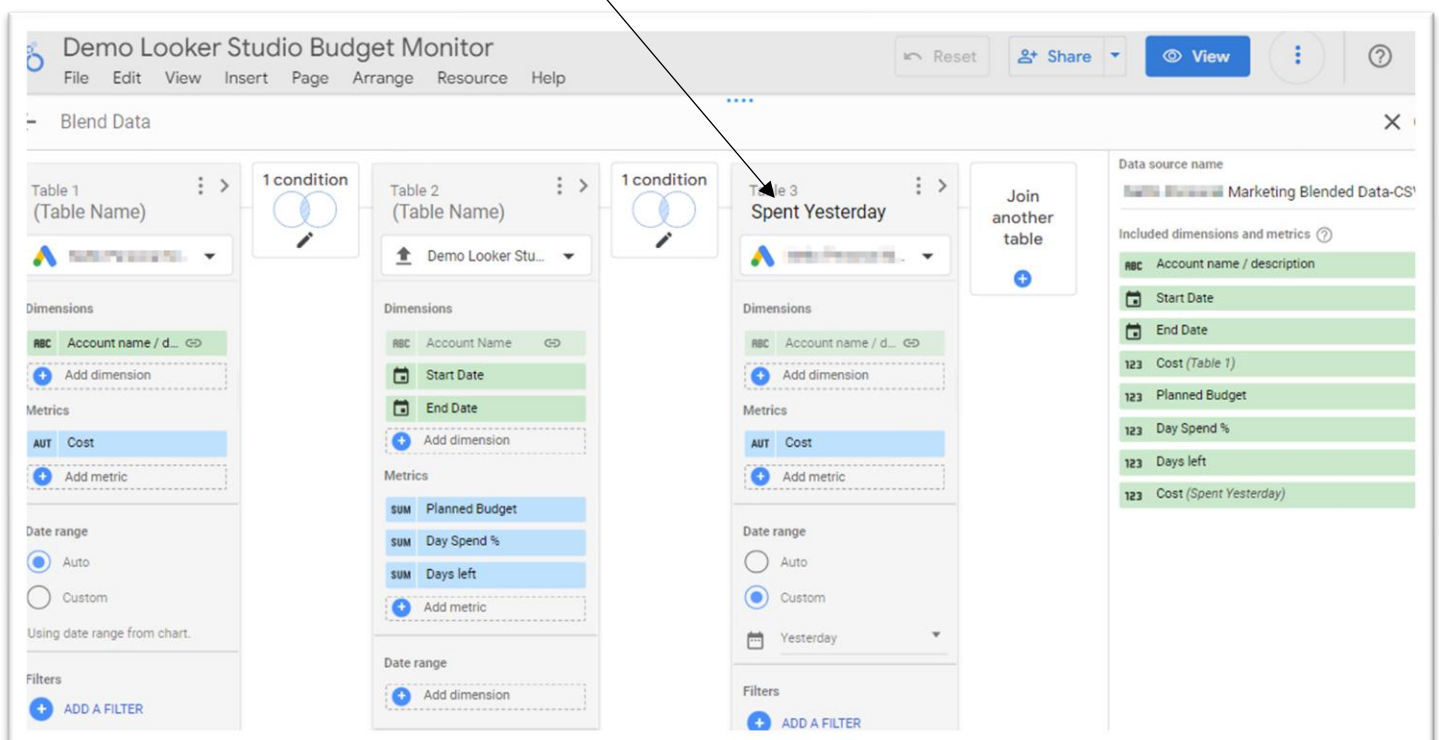
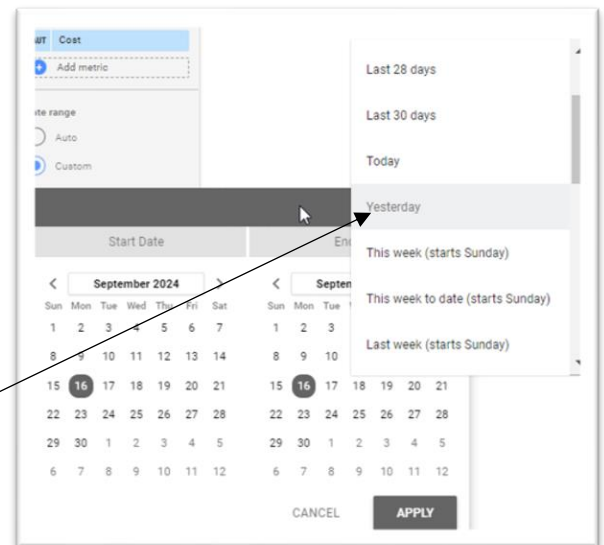
Days left

**Add Table 3 → Google Ads Data Source**

**Dimensions:** Account name / description

**Metrics:** Cost

**Date range:** Custom → Yesterday  
*(Rename Table as Spent Yesterday)*



Click on 'Join Configuration' in between the 3 tables  
select 'Join operator' → Inner as seen in the screenshot above.  
In 'Join conditions' we need to select account name

Then click Save

Join configuration

Join operator

Tell us how rows from all the tables on the left and the table to the right are combined.

Left outer Right outer **Inner** Full outer Cross

Returns only matching rows from the left and right tables

Join conditions

Tell us how these tables are related. Add one or more fields from the tables to the left that match the fields in the table to the right.

ABC Account name / description (Table 1) ↔ ABC Account Name (Table 2)

+ Add field + Add field

Cancel Save

Tick Mark 'Hide repeated join fields' → Rename the Blend → and then click 'SAVE' → Click Close

Blend Data

Table 1 (Table Name) 1 condition

Table 2 (Table Name) 1 condition

Table 3 Spent Yesterday

Join another table

Data source name: Blended Data-CSV

Included dimensions and metrics

- ABC Account name / description
- Start Date
- End Date
- 123 Cost (Table 1)
- 123 Planned Budget
- 123 Day Spend %
- 123 Days left
- 123 Cost (Spent Yesterday)

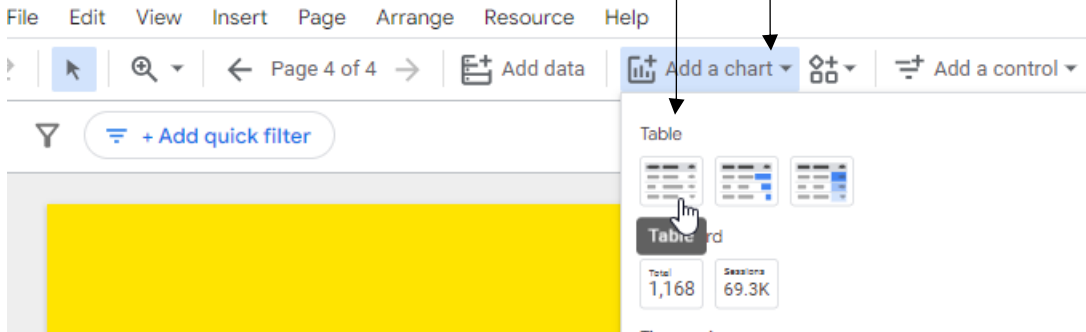
Hide repeated join fields ☒

SAVE



## Step 10: Add Chart → Table

### Looker Studio Budget Monitor



Place the chart anywhere on the report

Adjust the 'Data source' to the blended data we just created

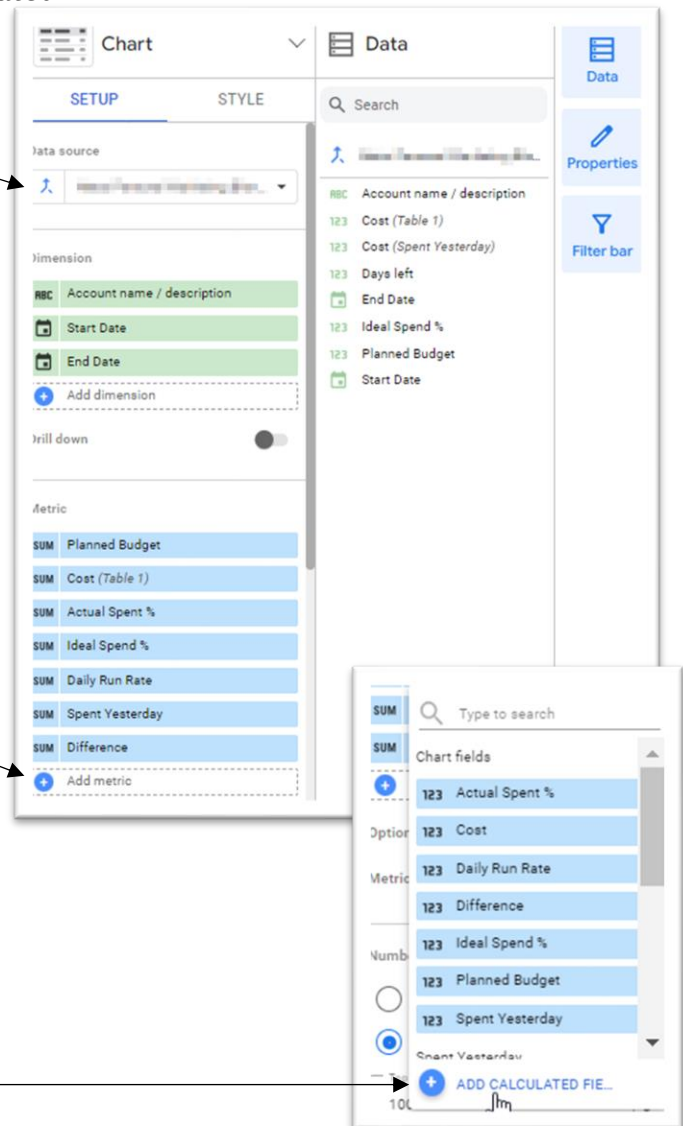
### Add Dimension

- Account name / description
- Start Date
- End Date

### Add Metrics

- Planned Budget
- Cost (Table 1)
- Day spend %
- Cost (Spent Yesterday)

## Step 11: Add Metric → ADD CALCULATED FIELD





**Add below formulas**

- i. **Budget Spend%**
  - Data Type: Percentage
  - Formula: Cost (Table 1)/Planned Budget
- ii. **Ideal daily spend**
  - Formula: (Planned Budget-Cost (Table 1))/Days left
  - Data Type: Currency EUR – Euro (€)

**SUM Actual Spent %**

Name: Actual Spent %

Data Type: Percent

Display Format: Default

Formula: 1 Cost (Table 1) / Planned Budget

Aggregation: ☒ Sum, ☐ Average, ☐ Count, ☐ Count Distinct, ☐ Min, ☐ Max, ☐ Median, ☐ Standard Deviation, ☐ Variance

Comparison calculation: None

Running calculation: None

APPLY

- iii. **Difference**
  - Cost (Spent Yesterday)-((Planned Budget-Cost (Table 1))/Days left)
  - Data Type: Currency EUR – Euro (€)

**Ideal daily spend Formula**

**Note: sometimes the column name can be *Cost* or *Cost (Converted)***

Rearrange metrics as desired

**Step 12:** Add Control → Date range control → Place it on the report → SETUP → select ‘This month to date’

Add a control

Drop-down list

Fixed-size list

Input box

Advanced filter

Slider

Checkbox

Preset filter

**Date range control**

Data control

Dimension control

Reset

Date range control Properties

SETUPSTYLE

Default date range

☐ Include today **This month to date**

Start Date

End Date

<September 2024>

<September 2024>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12

CANCELAPPLY

**Step 13:** Format Table (Color, number format, etc.)

Chart

SETUPSTYLE

Chart title

Show title

General

Conditional formatting

Table Header

Table Colors

Table Labels

Header Text Color

Header Text Size

Header Text Font

Header Background Color

Table content font color