

# Budget vs Actual

Annual budget tracker with YTD actuals, variance analysis and income vs expenditure summary.

## How to use

1. Enter your company name and financial year at the top of the Budget vs Actual tab.
2. Enter your annual budget figures for each income and expenditure category.
3. Enter your year-to-date budget (proportion of annual budget earned or spent so far).
4. Enter your year-to-date actual figures from your accounting records.
5. Variance and Variance % calculate automatically. Overspend on expenses shows in red.
6. Total Income, Total Expenditure and Net Surplus update at the bottom.
7. The colour band at the top shows total income and surplus at a glance.

## Clearing the sample data

The blue cells contain example data. Select them and press Delete to start your own. The white, calculated cells look after themselves.

## Removing the footer credit

A small OpenSheets credit prints in the page footer. You are welcome to keep it or remove it from Page Layout, Page Setup, Header/Footer.

## Notes

Blue cells are your inputs. Calculated cells and totals update automatically. Do not type over them. The sheet is protected so only the blue cells can be edited.

Free template from

[OpenSheets.co.uk](https://www.opensheets.co.uk)

Professional spreadsheet templates for UK small businesses.

Going digital for Making Tax Digital?

[aligned.tax](https://aligned.tax)

MTD for Income Tax bridging and compliance for sole traders and landlords.

