

## Making a Budget Template

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|---------|----------------|---------------|------------|------------------|-------------|-----------|-------------------|------------------------|-------------|
| 500     | Paste          | Calibri B I U | a<br>AA^   | = =              |             | ř.        | General<br>\$ - % | •<br>00. 0.<br>0.€ 00. | Survey Form |
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| $f_{x}$ | Household Bud  | dget: August  | 2017       |                  |             |           |                   |                        |             |
|         | А              | В             | С          | D                | E F         |           | G H               | 1                      | J           |
| 1       | House          | hold Budg     | et: Aug    | Rename Sheet     |             |           | ×                 | 1                      |             |
| 2       | Category       | Budgeted      | Spen       | Rename Sneet     |             |           |                   |                        |             |
| 3       | Food           | \$ 250.00     | \$ 245     | Rename sheet to: |             |           |                   |                        |             |
| 4       | Health         | \$ 175.00     | \$ 200     | August 2017      |             |           |                   |                        |             |
| 5       | Housing        | \$ 730.00     | \$ 735     | August 2017      |             |           |                   |                        |             |
| 6       | Transportation | \$ 360.00     | \$ 360     |                  |             | -         |                   |                        |             |
| 7       | Personal       | \$ 150.00     | \$ 144     |                  |             | ОК        | Cancel            |                        |             |
| 8       | Finance        | \$ 10.00      | \$ 10.     | ¢ 00             |             |           |                   |                        |             |
| 9       | Other          | \$ 75.00      | \$ 85.0    | 00 \$ (10.00)    |             |           |                   |                        |             |
| 10      | Total          | \$ 1,750.00   | \$ 1,779.0 | 00 \$ (29.00)    |             |           |                   |                        |             |
| 11      |                |               |            |                  |             |           |                   |                        |             |
| 12      | Income         | \$ 1,750.00   |            |                  |             |           |                   |                        |             |
| 13      | Total Savings  | \$ (29.00)    |            |                  |             |           |                   |                        |             |
| 14      |                |               |            |                  |             |           |                   |                        |             |
| 15      |                |               |            |                  |             |           |                   |                        |             |
| 16      |                |               |            |                  |             |           |                   |                        |             |
|         | •              |               |            | _                |             |           |                   |                        |             |
| 4       | 4 1 1          | Sheet1        |            | P)               |             |           |                   |                        |             |
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This month's budget is complete. Now we can use it as a template for next month, rather than starting from scratch.

At the bottom of the window are tabs that represent each worksheet. We can have multiple worksheets inside of the same file.

First, double click on the tab to name this worksheet. I'll type the month and the year, and click OK.



| 5         |                | Calibri<br>B I U | • 1-<br><u>D</u> abc | · =        | = =    |          | General          | •       |              |
|-----------|----------------|------------------|----------------------|------------|--------|----------|------------------|---------|--------------|
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| $f_{x}$   | Household Bu   | dget: August     | 2017                 |            |        |          |                  |         |              |
|           | А              | В                | С                    | D          | E      | F        | G H              | 1       | J            |
| 1         | House          | hold Budge       | et: August           | 2017       |        |          |                  |         |              |
| 2         | Category       | Budgeted         | Spent                | Difference |        |          |                  |         |              |
| 3         | Food           | \$ 250.00        | \$ 245.00            | \$ 5.00    |        |          |                  |         |              |
| 4         | Health         | \$ 175.00        | \$ 200.00            | \$ (25.00) |        |          |                  |         |              |
| 5         | Housing        | \$ 730.00        | \$ 735.00            | \$ (5.00)  |        |          |                  |         |              |
| 6         | Transportation | \$ 360.00        | \$ 360.00            | \$ -       |        |          |                  |         |              |
| 7         | Personal       | \$ 150.00        | \$ 144.00            | \$ 6.00    |        |          |                  |         |              |
| 8         | Finance        | \$ 10.00         | \$ 10.00             | s -        |        |          |                  |         |              |
| 9         | Other          | \$ 75.00         | \$ 85.00             | \$ (10.00) |        |          |                  |         |              |
| 10        | Total          | \$ 1,750.00      | \$ 1,779.00          | \$ (29.00) |        |          |                  |         |              |
| 11        |                |                  |                      |            |        |          |                  |         |              |
| 12        | Income         | \$ 1,750.00      |                      |            |        |          |                  |         |              |
| 13        | Total Savings  | \$ (29.00)       |                      |            |        |          |                  |         |              |
| 14        |                |                  |                      |            |        |          |                  |         |              |
| 15        |                |                  |                      |            |        |          |                  |         |              |
| 16        |                |                  |                      |            |        |          |                  |         |              |
| 4         | 4              | August           |                      | heet1      | (+)    |          |                  |         |              |

Next, click on the Plus Sign to create a new worksheet.

We'll go back to the first worksheet and copy all the cells. I can select all cells with this triangular button in the top left corner of the spreadsheet. Next I click the icon to copy those cells.

I'll return to our blank worksheet and click on paste.



| 5         | <b>*</b>       | Calibri<br>B I U | - 11<br><u>D</u> ab∈ | · = =       | = =   |       | ē  | Genera | al  |                   |   | Ą.            |
|-----------|----------------|------------------|----------------------|-------------|-------|-------|----|--------|-----|-------------------|---|---------------|
| с<br>Indo | Paste 💉        | B - 💆 -          | _                    | =           | Align |       | •  | \$ -   | % * | 00, 0,<br>0.← 00. |   | orma<br>Table |
| $f_{x}$   |                |                  |                      |             |       |       |    |        |     |                   |   | _             |
|           | A              | В                | С                    | D           | E     | F     |    | G      | н   | 1                 | J |               |
| 1         | Househo        | ld Budget        | : Septembe           | er 2017     |       |       |    |        |     |                   |   |               |
| 2         | Category       | Budgeted         | Spent                | Difference  |       |       |    |        |     |                   |   |               |
| 3         | Food           | \$ 250.00        | \$ 245.00            | \$ 5.00     |       |       |    |        |     |                   |   |               |
| 4         | Health         | \$ 175.00        | \$ 200.00            | \$ (25.00)  |       |       |    |        |     |                   |   |               |
| 5         | Housing        | \$ 730.00        | \$ 735.00            | \$ (5.00)   |       |       |    |        |     |                   |   |               |
| 6         | Transportation | \$ 360.00        | \$ 360.00            | \$ -        |       |       |    |        |     |                   |   |               |
| 7         | Personal       | \$ 150.00        | \$ 144.00            | \$ 6.00     |       |       |    |        |     |                   |   |               |
| 8         | Finance        | \$ 10.00         | \$ 10.00             | \$ -        |       |       |    |        |     |                   |   |               |
| 9         | Other          | \$ 75.00         | \$ 85.00             | \$ (10.00)  |       |       |    |        |     |                   |   |               |
| 10        | Total          | \$ 1,750.00      | \$ 1,779.00          | \$ (29.00)  |       |       |    |        |     |                   |   |               |
| 11        |                |                  |                      |             |       |       |    |        |     |                   |   |               |
| 12        | Income         | \$ 1,750.00      |                      |             |       |       |    |        |     |                   |   |               |
| 13        | Total Savings  | \$ (29.00)       |                      |             |       |       |    |        |     |                   |   |               |
| 14        |                |                  |                      |             |       |       | ٦. |        |     |                   |   |               |
| 15        |                |                  |                      |             |       |       | -  |        | 1   |                   |   |               |
| 16        |                |                  |                      |             |       | 1.000 |    |        | -   | Enter             |   |               |
| 4         | <b>4</b>       | August           | 2017 5               | eptember 20 | 17    |       |    |        |     |                   |   |               |

Now we have a duplicate worksheet. I'll rename it for the next month. We need to change the month in the heading. I can Double-Click on the cell to edit the text.

I'll click after the month, delete the text by pressing Backspace, and type the new month. I press Enter to finish making the change.



| 5         | <b>*</b>         | Calibri<br>B I U     |                          | • = =              | =      |       | Gener | ral    |               |                                 |
|-----------|------------------|----------------------|--------------------------|--------------------|--------|-------|-------|--------|---------------|---------------------------------|
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| $f_{x}$   | Category         |                      |                          |                    |        |       |       |        |               |                                 |
|           | Α                | В                    | С                        | D                  | E      | F     | G     | Н      | 1             | J                               |
| 1         | Househo          | d Budget:            | Septembe                 | r 2017             |        |       |       |        |               |                                 |
| 2         | Category         | Budgeted             | Spent                    | Difference         |        |       |       |        |               |                                 |
| 3         | Food             | \$ 250.00            | \$ 245.00                |                    |        |       |       |        |               |                                 |
| 4         | Health           | \$ 175.00            |                          |                    |        |       |       |        |               |                                 |
| 5         | Housing          | \$ 730.00            | \$ 735.00                | \$ (5.00)          |        |       |       |        |               |                                 |
| 6         | transportation   | -                    |                          |                    |        |       |       |        |               |                                 |
| 7         | Personal         | \$ 150.00            | \$ 144.00<br>\$ 10.00    |                    |        |       |       |        |               |                                 |
| 9         | Finance<br>Other | \$ 10.00<br>\$ 75.00 | \$ 10.00<br>\$ 85.00     | \$ -<br>\$ (10.00) |        |       |       |        |               | 5                               |
| 10        | Total            | \$ 1,750.00          | \$ 1,779.00              | \$ (29.00)         |        |       |       |        |               |                                 |
| 11        | lotal            | \$ 1,7 30.00         | \$ 1,775.00              | \$ (25.00)         |        |       |       |        |               |                                 |
| 12        | Income           | \$ 1,750.00          |                          |                    |        |       |       |        |               |                                 |
| 13        | Total Savings    | \$ (29.00)           |                          |                    |        |       |       |        |               |                                 |
| 14        |                  |                      |                          |                    |        |       |       |        |               |                                 |
| 15        |                  |                      |                          |                    |        |       |       |        |               |                                 |
| 16        |                  |                      |                          |                    |        |       |       |        |               |                                 |
|           | 4                |                      |                          |                    |        |       |       |        |               |                                 |
| 1         | 4 F FL           | August               | 2017 5                   | eptember 201       | 7      | ( + ) |       |        |               |                                 |

Some expenses may vary greatly from month-to-month, so you may need to review and edit your estimated amounts. For example, the cost of utilities might change between seasons depending on the cost of heating and air conditioning. For now, we'll leave these amounts the same.



| FIL            | E HOME         |     | ibri     | DAT       | A REV      |      |          | -    | Tell me v     |     |                 |        | EDIT IN E         |                                |
|----------------|----------------|-----|----------|-----------|------------|------|----------|------|---------------|-----|-----------------|--------|-------------------|--------------------------------|
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| f <sub>x</sub> | 700            |     |          | 1 UTI     |            |      |          | Alig | intene        |     |                 | Humber |                   | Tables                         |
|                | A              |     | В        |           | с          |      | D        | E    | F             |     | G               | н      | L.                | J                              |
| 1              | Househo        | bld | Budget:  | Se        | otembe     | r 20 | 017      |      |               |     |                 |        |                   |                                |
| 2              | Category       |     | Budgeted | 1         | Spent      |      | fference |      |               |     |                 |        |                   |                                |
| 3              | Food           | S   |          | S         | 245.00     |      | 5.00     |      |               |     |                 |        |                   |                                |
| 4              | Health         | S   | 175.00   | S         | 200.00     | s    | (25.00)  |      |               |     |                 |        |                   |                                |
| 5              | Housing        | \$  | 730.00   | \$        | 700.00     | \$   | 30.00    |      |               |     |                 |        |                   |                                |
| 6              | Transportation | \$  | 360.00   |           |            | \$   | 360.00   |      |               |     |                 |        |                   |                                |
| 7              | Personal       | S   | 150.00   |           |            | \$   | 150.00   |      |               |     |                 |        |                   |                                |
| 8              | Finance        | \$  | 10.00    |           |            | \$   | 10.00    |      |               |     |                 |        |                   |                                |
| 9              | Other          | Ś   | 75.00    |           |            | Ś    | 75.00    |      |               |     |                 |        |                   |                                |
| 0              | Total          | \$  | 1,750.00 | \$        | 1,145.00   | \$   | 605.00   |      |               |     |                 |        |                   |                                |
| 1              |                |     |          |           |            |      |          |      |               | ~   |                 |        |                   |                                |
| 2              | Income         | S   | 1,800.00 |           |            |      |          |      | (             |     | L.              |        |                   |                                |
| 3              | Total Savings  | \$  | 655.00   |           |            |      |          |      |               |     | )               |        |                   |                                |
| 4              |                |     |          |           |            |      |          |      |               |     |                 |        |                   |                                |
| 5              |                |     |          |           |            |      |          |      |               |     |                 |        | ~                 | Delete                         |
| 6              |                |     |          |           |            |      |          |      |               |     |                 |        |                   |                                |
|                | <b>4</b> → →   |     | August 2 | 2017      | Se         | pte  | mber 201 | 7    | ÷             |     |                 |        | _                 |                                |

We can clear out the amounts spent by selecting them and pressing "Delete" on the keyboard. I'll delete the income amount too.

Notice all the formulas are still there and ready to go. When I add some expenses for this month, they immediately start to fill in.



|         | 🚔 🔏             | Cal | ibri     |          | * 11         |     | = _      | -       |       |         |               |                           |                     |                          |
|---------|-----------------|-----|----------|----------|--------------|-----|----------|---------|-------|---------|---------------|---------------------------|---------------------|--------------------------|
| S<br>C  | Paste           | B   | ΙŪ       | A<br>For | ab∈<br>• A A |     | = =      | =       |       | ii<br>H | Accou<br>\$ - | nting<br>% * to<br>Number | •<br>0 _00<br>• →.0 | Survey Form<br>as Tables |
|         |                 |     |          | FOR      | L            |     |          | Alignin | ent   |         |               | Number                    |                     | Tables                   |
| $f_{x}$ | =SUM(C3:C10)    |     |          | _        |              |     |          |         |       |         |               |                           |                     |                          |
|         | A               |     | В        |          | С            |     | D        | E       | F     |         | G             | н                         | 1                   | J                        |
| 1       | Househo         | ld  | Budget:  | Se       | ptembe       | r 2 | 017      |         |       |         |               |                           |                     |                          |
| 2       | Category        | B   | udgeted  |          | Spent        | Di  | fference |         |       |         |               |                           |                     |                          |
| 3       | Food            | S   | 250.00   | S        | 245.00       | \$  | 5.00     |         |       |         |               |                           |                     |                          |
| 4       | Health          | \$  | 175.00   | S        | 200.00       | \$  | (25.00)  |         |       |         |               |                           |                     |                          |
| 5       | Housing         | \$  | 730.00   | \$       | 700.00       | \$  | 30.00    |         |       |         |               |                           |                     |                          |
| 6       | School Supplies | \$  | 50.00    | \$       | 48.50        | \$  | 1.50     |         |       |         |               |                           |                     |                          |
| 7       | Transportation  | \$  | 360.00   |          |              | \$  | 360.00   |         |       |         |               |                           |                     |                          |
| 8       | Personal        | \$  | 150.00   |          |              | \$  | 150.00   |         |       |         |               |                           |                     |                          |
| 9       | Finance         | \$  | 10.00    |          |              | \$  | 10.00    |         |       |         |               |                           |                     |                          |
| 10      | Other           | \$  | 75.00    |          |              | \$  | 75.00    |         |       |         |               |                           |                     |                          |
| 11      | Total           | \$  | 1,800.00 | \$       | 1,193.50     | \$  | 606.50   |         |       |         |               |                           |                     |                          |
| 12      |                 |     |          |          |              |     |          |         |       |         |               |                           |                     |                          |
| 13      | Income          | \$  | 1,800.00 |          |              |     |          |         |       |         |               |                           |                     |                          |
| 14      | Total Savings   | \$  | 606.50   |          |              |     |          |         |       |         |               |                           |                     |                          |
| 15      |                 |     |          |          |              |     |          |         |       |         |               |                           |                     |                          |
| 16      |                 |     |          |          |              |     |          |         |       |         |               |                           |                     |                          |
|         | 4               |     |          | 1        |              |     |          |         |       |         |               |                           |                     |                          |
| 14      | 4 F F           |     | August 2 | 2017     | 7 Se         | pte | mber 201 | 7       | ( + ) |         |               |                           |                     |                          |

If you need to add a new expense for a particular month, you can insert a row. Right click on the row header and choose "Insert". The new row appears just above where you clicked. I'll add in some new expenses.

When you insert a row, sometimes the formatting and formulas will automatically be applied. If they are not, you can apply the formatting and check your formulas to make sure they are still accurate.



|    | А               | В       |        |      | С        |      | D        | E  |
|----|-----------------|---------|--------|------|----------|------|----------|----|
|    | Househo         | d Bud   | lget:  | Sep  | otembe   | r 20 | 017      |    |
| 2  |                 | Budge   |        |      | Spent    |      | fference |    |
| 3  | Food            | \$ 25   | 50.00  | \$   | 245.00   | \$   | 5.00     |    |
| 4  | Health          | \$ 17   | 75.00  | \$   | 200.00   | \$   | (25.00)  |    |
| 5  | Housing         | \$ 73   | 30.00  | \$   | 700.00   | \$   | 30.00    |    |
| 6  | School Supplies | \$ 5    | 50.00  | \$   | 48.50    | \$   | 1.50     |    |
| 7  | Transportation  | \$ 36   | 50.00  |      |          | \$   | 360.00   |    |
| 8  | Personal        | \$ 15   | 50.00  |      |          | \$   | 150.00   |    |
| 9  | Finance         | \$ 1    | 10.00  |      |          | \$   | 10.00    |    |
| 10 | Other           | \$ 7    | 75.00  |      |          | \$   | 75.00    |    |
| 11 | Total           | \$ 1,80 | 00.00  | \$ 1 | 1,193.50 | \$   | 606.50   |    |
| 12 | 2               |         |        |      |          |      |          |    |
| 13 | Income          | \$ 1,80 | 00.00  |      |          |      |          |    |
| 14 | Total Savings   | \$ 60   | 06.50  |      |          |      |          |    |
| 19 | ;               | _       | _      | _    |          | _    |          |    |
| 16 | 5               |         |        |      |          |      |          |    |
|    | 4               |         |        |      |          |      |          |    |
| H. | 4 1 1           | Auc     | gust 2 | 017  | Se       | pte  | mber 201 | 17 |

Our budget is complete! We can use this budget every month to keep track of income and expenses.

You can customize the budget to show whichever expenses you need to keep track of, and use formulas and functions to quickly do the math for you.

