

Add Annual Budgets

Last Modified on 07/16/2020 8:56 pm MDT

Budget data populates the Budget column shown below, and provide goals or targets for scheduling. Budget data is often entered for an entire year. The Schedule column reflects a re-forecast sales number, and reflects labor scheduled.

Total Week				Monday - Sunday
	2019	Budget	Scheduled	Actual
Sales	\$0	\$188,040	\$188,040	\$190,743
Hours	0	122	141	141
OT Hours	0		0.0	0.0
\$ Hourly	\$0	\$1,671	\$1,943	\$1,949
\$ OT Premium	\$0		\$0	\$0
\$ Hourly + OT	\$0	\$1,671	\$1,943	\$1,949
% Hourly + OT	0%	0.9%	1.0%	1.0%
Training / Ops Hours	0.0		0.0	0.0
\$ Training / Ops	\$0		\$0	\$0
% Training / Ops	0%		0.0%	0.0%
% Total Hourly	0.0%	0.9%	1.0%	1.0%
\$ Salary	\$846	\$923	\$0	\$0
% Salary	0.0%	0.5%	0.0%	0.0%
\$ Total Salary + Hourly	\$846	\$2,595	\$1,943	\$1,949
% Total Salary + Hrly	0.0%	1.4%	1.0%	1%
Commission				\$302
Productivity Index	\$0.00	\$1,541.31	\$1,333.62	\$1,355.29
Transactions:0 Guests:0 — Week 2019 Transactions: N/A Guests: N/A				

To upload an annual budget, go to the Gearwheel Menu > Import, and scroll down to **Import Budget Data**

Click the Link shown below to download the template format. (please use CHROME browser for this procedure)

Import Budget Data

All CSV Budget files must contain their data type in the name.

sales.csv is the sales data

hourly_cost.csv is the hourly cost data

salary_cost.csv is the salary cost data

hours.csv is the hours data

labor_percent.csv is the labor % data

labor_w_mgmt_percent.csv is the labor with salary % data

[Click here to download the 'Budget Import Template File'](#)

Click to upload a data file

Or, just drag a file here!

Fill out template and upload, listing the Schedule(s) which house sales and budget data in Column B. Column A is internal and does not affect the import. Period# with dates reflecting the start of the workweek should populate rows 3 and 4.

Upload file when complete

	A	B	C	D	E	F	G	H
1	Budgeted Hours							
2								
3			PP 11	PP 11	PP 12	PP 12	PP 13	PP 13
4			5/6/19	5/13/19	5/20/19	5/27/19	6/3/19	6/10/19
5	8	Fort Collins	140	140	150	150	150	150
6	10	Arvada	125	125	125	125	125	125
7								

NOTES:

- Data points should be Total Weekly Budget for the given period.
- Only one data type (i.e. Labor Hours) can populate a single CSV file.
- The file name protocol shown in the orange outline must be used to indicate which data point are being uploaded.

All CSV Budget files must contain their sales.csv is the sales data

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labor_w_mgmt_percent.csv is the labor with management percent data

[Click here to download the Budget Template](#)

Alternatively, Budget data can be based on prior year's Budget or Sales data.

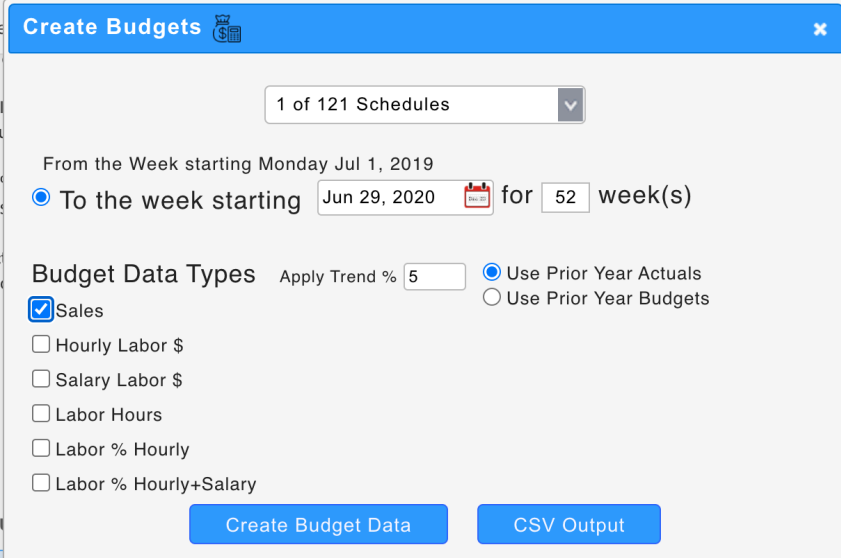
Go to the Gearwheel Menu > Analytics, and press **Create Budgets**

Setup Budgets from Prior Year Data

Create Budgets 

Make the following selections:

1. Select schedule(s) for which you are applying your budgets
2. Select the [future] date which begins the start of your budget period, and the #weeks you wish to apply the budget to
3. Select the Budget Data Type
4. Select Prior Year Actuals or Prior Year Budget, and apply a % trend if desired, i.e. 5 or -5
5. Press Create Budget Data



To download a prior year's budget or actual data, select the date into the past as desired, select the data type, and press CSV Output.

CSV Output

The CSV can be modified, and uploaded as shown at the beginning of this article.

NOTE:

By default, % Labor is manually entered as a budget or scheduling target.

If you would like to enter Labor \$ and have % Labor derived, make the following selection in Gearwheel > Analytics, and Save Settings

☒ **Manual Entry of Labor Budget. % Labor vs Sales is Derived**
