

Add Annual Budgets

Last Modified on 06/01/2024 12:12 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.

Budget Targets by Week

Scheduled Analytics are the ACTUAL Scheduled Labor with Forecast Sales

Sun May 26		Mon May 27		Tue May 28		
Sales	1000	900	1000	1050	1000	1200
% Hourly	13.5%	15.0%	13.5%	12.9%	13.5%	11.3%
Tips	(\$0)	Note	(\$0)	Note	(\$0)	Note
Sales per Lbr Hr	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Total Week			Sunday - Thursday		
	2023	Budget	Scheduled	Schd WTD	Actual
Sales	\$0	\$10,000	\$8,500	\$5,500	\$5,850
Hours	0	0	45	45	45
OT Hours	0		5.0	5.0	5.0
\$ Hourly	\$0	\$900	\$675	\$675	\$675
\$ OT Premium	\$0	\$0	\$38	\$38	\$38
\$ Hourly + OT	\$0	\$900	\$713	\$713	\$713
% Hourly + OT	0%	9.00%	8.4%	13.0%	12.2%
Training / Ops Hours	0.0		0.0	0.0	0.0
\$ Training / Ops	\$0	\$100	\$0	\$0	\$0
% Training / Ops	0%	1.00%	0.0%	0.0%	0.0%
% Total Hourly	0.0%	10.00%	8.4%	13.0%	12.2%
\$ Salary	\$0	\$500	\$0	\$0	\$0
% Salary	0.0%	5.00%	0.0%	0.0%	0.0%
\$ Total Salary + Hourly	\$0	\$1,500	\$713	\$713	\$713
% Total Salary + Hrly	0.0%	15.00%	8.4%	13.0%	12.2%

First- determine which fields should be used to set targets (the remaining fields will be computed). Settings are applied using gearwheel menu > **Analytics Settings** > Save

For example, the most common setting configuration, shown below, expects a business to peg an Hourly Labor % target. Salary Dollars can be entered if desired, so that total labor shows.

Regardless of which control is desired, a sales forecast is essential.

Settings determine which fields a used to set budget targets

	2023	Budget	Scheduled	Schd WTD	Actual
Sales	\$0	\$10,000	\$8,500	\$7,500	\$5,850
Hours	0	0	45	45	45
OT Hours	0		5.0	5.0	5.0
\$ Hourly	\$0	\$900	\$675	\$675	\$675
\$ OT Premium	\$0	\$0	\$38	\$38	\$38
\$ Hourly + OT	\$0	\$900	\$713	\$713	\$713
% Hourly + OT	0%	9.00%	8.4%	9.5%	12.2%
Training / Ops Hours	0.0		0.0	0.0	0.0
\$ Training / Ops	\$0	\$100	\$0	\$0	\$0
% Training / Ops	0%	1.00%	0.0%	0.0%	0.0%
% Total Hourly	0.0%	10.00%	8.4%	9.5%	12.2%
\$ Salary	\$0	\$500	\$0	\$0	\$0
% Salary	0.0%	5.00%	0.0%	0.0%	0.0%
\$ Total Salary + Hourly	\$0	\$1500	\$713	\$713	\$713
% Total Salary + Hrly	0.0%	15.00%	8.4%	9.5%	12.2%

Budget Analytics

- Create Budget Based on HOURLY % before Training & Admin
- Create Budget Based on HOURLY % inclusive of Training & Admin
- Create Budget Based on TOTAL LABOR (Hourly + Salary), Hourly % is derived after Salaries are subtracted
- Manual entry of Labor Dollars. % Labor is Derived

NOTE: If the analytic choices are different than shown above, ask a Teamwork representative to use engineering resources to turn on the **New Budget Analytics** feature flag for the intended site.

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

Following are the CSV worksheet NAMES that will target intended budget fields. The most common are highlighted below.

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

	2023	Budget	Scheduled	Schd WTD	Actual
Sales	\$0	\$10,000	\$8,500	\$7,500	\$5,850
Hours	0	0	45	45	45
OT Hours	0		5.0	5.0	5.0
\$ Hourly	\$0	\$900	\$675	\$675	\$675
\$ OT Premium	\$0	\$0	\$38	\$38	\$38
\$ Hourly + OT	\$0	\$900	\$713	\$713	\$713
% Hourly + OT	0%	9.00%	8.4%	9.5%	12.2%
Training / Ops Hours	0.0		0.0	0.0	0.0
\$ Training / Ops	\$0	\$100	\$0	\$0	\$0
% Training / Ops	0%	1.00%	0.0%	0.0%	0.0%
% Total Hourly	0.0%	10.00%	8.4%	9.5%	12.2%
\$ Salary	\$0	\$500	\$0	\$0	\$0
% Salary	0.0%	5.00%	0.0%	0.0%	0.0%
\$ Total Salary + Hourly	\$0	\$1500	\$713	\$713	\$713
% Total Salary + Hrly	0.0%	15.00%	8.4%	9.5%	12.2%

Import Budget Data

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

- sales.csv is the weekly sales data
- sales_distribute.csv is the weekly sales data evenly distributed to each day of the week as projected
- 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_hr_ot_percent.csv is the labor Hourly OT % data
- labor_w_mgmt_percent.csv is the labor with salary % data
- training_admin_percent.csv is the Training Admin Percent data
- daily_sales_budget.csv is the daily sales data
- daily_hours_budget.csv is the daily hours data

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

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

Click to upload a Budget 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
1	Sales				
2					
3			PP 1	PP 2	
4			5/19/24	2/25/24	
5	1 Joes FOH		15,000	15,400	
6					
7					

Annotations:

- Weeks 1-52 (for user benefit, not system logic) - points to columns C and D.
- Sequential (Not a driver of system logic) - points to column A.
- Schedule Name (EXACT) - points to "1 Joes FOH" in row 5.
- Starting date of week - points to "2/25/24" in row 4, column D.

NOTES:

- Data points should be Total Weekly Budget for the given period. (Exception: There is a format available for importing sales forecasts daily instead of weekly)
- Only one data type (i.e. Labor Hours) can populate a single CSV file.
- The file name must be exactly as shown in the import list above, to indicate which data point are being uploaded.
- Sales do not need to be entered for every schedule, rather, only the top level schedule which is mapped to the other schedules in a location.

Entering Budgets from the Gearwheel Menu > Analytics Page, from prior year data.

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



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

Create Budgets 1 of 121 Schedules

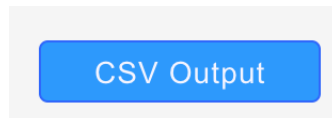
From the Week starting Monday Jul 1, 2019

To the week starting Jun 29, 2020 for 52 week(s)

Budget Data Types Apply Trend % Use Prior Year Actuals
 Use Prior Year Budgets

Sales
 Hourly Labor \$
 Salary Labor \$
 Labor Hours
 Labor % Hourly
 Labor % Hourly+Salary

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.



Typical entries and budgeting methods are shown in this document. If you'd like assistance with setup of an alternative format, such as using labor dollars and labor hours as targets, reach a Teamwork specialist.

If you have any issue uploading budgets, please reach teamworksupport@spoton.com, and include the CSV file you are trying to upload.