

Budget

The Budget page gives ACME Creative Agency a complete financial picture across all projects — tracking what you've spent, what you've earned, and how you're tracking against your goals.

Key Features

- **KPI Summary:** Four headline numbers at the top — Total Budgets, Total Spent, Total Revenue, and Overall P&L. The P&L turns green when you're profitable and red when you're not.
- **Monthly Objectives Grid:** Set your budget and revenue targets month by month for the year. Just click any number and type a new value — it saves automatically. Rows show your targets alongside actual expenses and actual revenue so you can see how each month compares. Use the arrows to flip between years.
- **Monthly Spending vs Revenue Chart:** A side-by-side bar chart covering the last 12 months. Red bars are expenses, green bars are revenue — a quick way to spot which months were your strongest.
- **Expense Breakdown:** See where your money is going by category — Labor, Equipment, Subcontractor, Travel, Software, and more. Each category shows its share of total spending as a percentage bar.
- **Revenue per Year:** A horizontal bar chart showing total paid revenue for each year ACME has been active. The current year is highlighted.
- **Project Budgets Table:** Every active project listed with its annual budget, total spent, a % used progress bar, revenue target, revenue earned, P&L, and a status badge (Under / On Target / Over). Click any column header to sort. Click any row to open that project.
- **Recent Expenses:** The 10 most recent expense entries across all of ACME's projects, with category, project name, amount, and date.
- **Add Expense:** Log a new expense directly from this page without going into a specific

project.

- **Export:** Download the full project budgets table as a CSV file for reporting or accounting.

How to Use

1. Open the **Budget** page from the sidebar to see your financial overview load automatically.
2. Review the four KPI cards at the top for a quick health check.
3. In the **Monthly Objectives** section, enter your spending budget and revenue targets for each month — type directly into any cell and it saves within a couple of seconds.
4. Scroll down to the **Project Budgets** table to see how individual projects are performing. Use the search box to find a specific project quickly.
5. Click **Add Expense** (top right) to log a cost — select the project, enter a description, amount, date, and category. Check "Billable to client" if the cost can be passed on.
6. Click **Export** to download the project budgets as a spreadsheet.

Tips

- A project's status badge turns **red (Over)** when spending exceeds its budget by more than 10% — a quick warning sign to investigate.
- The Monthly Objectives grid auto-saves as you type, but you'll see the row turn yellow briefly to confirm it's been registered.
- Clicking a project row in the table takes you directly to that project's detail page.
- Categories in the Expense Breakdown are set when you log each expense — being consistent with categories (e.g., always using "Labor" for staff costs) makes the breakdown more useful over time.