Free Event Planner Spreadsheet: how to use it

Start here:

Yellow cells are yours to fill in. Green-grey cells hold formulas: leave them alone and they fill themselves.

The example file is filled with fictional data so you can see every number working. The blank file is the same workbook, empty: use that one.

Google Sheets: File > Import > Upload the .xlsx (or open it from Google Drive), then File > Save as Google Sheets. Excel: just open it (Excel 2010 or newer). Numbers on Mac also opens it.

Set up (3 minutes):

1. Settings: your event types (up to 15), vendor categories (up to 15), the year (C2) and the check date (C4: type today's date, it decides which unpaid fees are OVERDUE).

2. Events: one row per event: date, event name (keep names unique), client, type, your planning fee and the fee received so far.

Fee balance and status (PAID, UPCOMING or OVERDUE) fill in. The three right-hand columns add up that event's vendor budget from the Vendors tab.

3. Vendors: one row per vendor quote: pick the event, type the vendor, category, quoted amount and what has been paid. Remaining fills in.

What you get:

Dashboard: events, fees booked and fees received by month; each event type with count and fees; unpaid fees, overdue fees and vendor money still to pay.

Limits: 200 events and 1,000 vendor rows. Need your own costs per event, an Expenses tab, profit by month and a tax set-aside? See the paid Event Planner Client, Fee and Vendor Budget Tracker at tuper.app/templates. Vendor amounts are the client's budget lines you track, not your income. This is a record-keeping tool, not tax advice.

Help:

Something wrong? Message us at support@tuper.app and we fix it.

Designed by Tuper. Built with AI tools and tested by us; tell us if anything breaks.