Photography Business Client, Booking and Income Tracker: 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.

Drop-down cells only take values from the lists on the Settings tab. Edit the lists and the drop-downs follow.

The example file is filled with fictional shoots and expenses so you can see every number working. The blank file is the same workbook, empty. Use the blank one for your business.

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, Windows or Mac). Numbers on Mac also opens it.

Set up (5 minutes):

1. Settings: your shoot types (wedding, portrait, family, event...), your expense categories, the year (F2), the % of profit you set aside for tax (F4) and the check date (F6, type today's date: it decides which unpaid balances are OVERDUE).

2. Bookings: one row per shoot: shoot date, client, shoot type, the fee you agreed, the deposit received, the balance received so far, and job costs (second shooter, travel, prints, venue fees).

Balance due, profit and a status fill in: PAID, UPCOMING (shoot is still ahead) or OVERDUE (shoot date passed, balance not paid).

3. Expenses: gear, software, insurance, editing subscriptions, marketing. One row each.

What you get:

Dashboard: shoots, booked fees, money received, money still owed, job costs, expenses, profit and tax set-aside by month; each shoot type with count, fees and average fee; overdue balances.

Use the Year cell on Settings to start a new year in a copy of the file.

This is a record-keeping tool, not tax advice.

Help:

Something wrong, or a column you need? Message us; we fix it and update the download for every buyer.

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