UK Landlord Income & Expense Tracker

Know your rental profit, late rent and next HMRC deadline at a glance

Getting started

Easy Start Here guide included – this page and the Start Here tab. **Video tutorial:** coming to our YouTube channel.

How to open in Google Sheets: 1. Upload the .xlsx to Google Drive. 2. Right-click it > Open with > Google Sheets. 3. File > Save as Google Sheets. 4. File > Settings > Locale: United Kingdom (for £ and UK dates). Formulas and charts are kept.

What you downloaded

- **UK-Landlord-Income-Expense-Tracker.xlsx**: filled in with fictional example data (5 properties). Explore it first.
- **UK-Landlord-Income-Expense-Tracker-BLANK.xlsx**: the empty copy for your own properties.
- **This Start-here.pdf**

Your 3-step plan

1. **Set up once (about 15 minutes).** Settings: tax year and tax rate. Properties: one row each, with your share if jointly owned. Recurring: mortgage interest, agent fees and service charges.
2. **Add things as they happen (about 10 minutes a month).** Income and Expenses: one row per payment, pick the property and SA105 category, add a receipt reference. Mileage is optional.
3. **Check and copy.** Dashboard: profit, tax to set aside and what needs attention. Rent Check: who is behind. MTD Quarters: copy the figures into your MTD software and enter the date you submitted. Tax Summary: your SA105 boxes at year end.

Good to know

- Cream (pale yellow) cells are yours; white and grey cells are worked out for you. Sheets are protected without a password (Review > Unprotect Sheet).
- The Health check on the Start Here tab and the Check column on each log flag missing receipts, possible duplicates and dates outside the tax year.
- This file keeps digital records. It is not HMRC-recognised software and does not submit anything to HMRC.
- Questions or stuck? Message PHKSheets on Etsy and we will help you set it up.

More landlord tools: UK Landlord Toolkit https://www.etsy.com/listing/4601973434 · Landlord Compliance Tracker · Rent Arrears Tracker · UK Rent Increase Planner.

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