



SpreadWiseCoTM

Spreadsheets Reimagined

RENTAL DASHBOARD GUIDE

5.3 - 8/31/2025

BUILT WITH
MICROSOFT
EXCEL



PRODUCT FEATURES & LEARNING TIME

PRODUCT FEATURES

SUPPORTS 25+ RENTALS IN ONE DASHBOARD

- ✓ COMPREHENSIVE RENTAL **BUSINESS OVERHEAD** TRACKING
- ✓ DETAILED RENTAL **PROPERTY MANAGEMENT** SYSTEM
- ✓ MONTHLY RENTAL INCOME, **EXPENSE, & VACANCY** TRACKING
- ✓ AUTOMATED RENTAL PERFORMANCE **METRICS & ANALYTICS**
- ✓ COMPREHENSIVE **EXPENSE TRACKING & TAX** REPORTING
- ✓ CUSTOMIZABLE **TAX CATEGORIES**
- ✓ ADVANCED **EXPENSE TAX** FILTERING AND ANALYSIS
- ✓ SIGNATURE **RENTAL LINKING** FEATURE FOR PORTFOLIO SCALING
- ✓ BUILT IN **GUIDANCE** NOTES
- ✓ FOUR INTEGRATED CURRENCIES (**USD, EUR, GBP, CAD**)



DASHBOARD LEARNING & SETUP CURVE

THIS IS OUR **BEST ESTIMATE** OF HOW MUCH TIME IT WILL TAKE THE AVERAGE PERSON TO **LEARN** AND COMPLETE THE **INITIAL SETUP** OF THEIR DASHBOARD



COMPATIBILITY

SOFTWARE APPLICATION

MICROSOFT EXCEL



GOOGLE SHEETS



APPLE NUMBERS



OPERATING
SYSTEMS



MICROSOFT
WINDOWS



MAC OS PRODUCT WAS BUILT WITH
MS EXCEL 365 FOR MAC

DESKTOP OR
LAPTOP



RECOMMENDED: OUR PRODUCTS ARE OPTIMIZED
FOR DESKTOP / LAPTOP USE

MOBILE USE
OF MS EXCEL



MICROSOFT 365
SHAREPOINT / ONE DRIVE



PHONE OR TABLET
WITH EXCEL APP

****PRODUCT WILL FUNCTION IN MOBILE APPLICATION USES, BUT BE AWARE OF THE FOLLOWING**

- *SOME FONTS MAY SHOW UP DIFFERENTLY*
- *BUILT IN GUIDE NOTES*
 - *LOSE SOME OF THEIR FORMATTING THAT HELPS EMPHASIZE KEY POINTS*
 - *NOTE BOXES MAY LOOK SMALL, AND HARD TO READ WITHOUT ZOOMING IN*
- *SOME CELL TEXT MAY APPEAR TO NOT FIT THE CELL WIDTH*

TABS & GUIDES

TABS & GUIDES



RENTAL
TABS

(*X2)



PERFORMANCE
DASHBOARD



PDF GUIDE



RENTAL DATA TABLE
& SUMMARY



DETAILED EXPENSE
TRACKER



RENTAL OVERHEAD



TAX CATEGORIES

***Includes (2) Rental tabs. By simply making a copy of the tab, you can add up to (25).*

LEARN MORE



ETSY LIMITS PRODUCT PHOTOS. LEARN MORE ABOUT THESE
ITEMS & FEATURES @ [HTTPS://SPREADWISECO.COM](https://spreadwise.co)

*Enjoy Your
Dashboard!*

ABOUT THIS GUIDE

GUIDE POINTERS

NEED TO
KNOW

NICE TO
KNOW

FOR THOSE READY TO JUMP IN QUICKLY



YOU CAN SKIP
AND COME BACK



DON'T SKIP!

**PASSWORD

- THE FILE PASSWORD IS INCLUDED IN THE FIRST TAB OF YOUR WORKBOOK.
- USE WITH DISCRETION. FORMULAS AND SETUPS CAN BE EXTREMELY COMPLEX, EVEN FOR THE MOST SAVVY SPREADSHEET USERS.

YOUTUBE TUTORIALS

IF THERE ARE YOUTUBE TUTORIALS AVAILABLE FOR THIS PRODUCT, YOU CAN ACCESS THEM BY CLICKING ON THE YOUTUBE LOGO.



DOWNLOAD THIS GUIDE ANYTIME AT [HTTPS://SPREADWISECO.COM](https://spreadwise.co.com)

FREQUENTLY ASKED QUESTIONS

YOUTUBE TUTORIALS

CLICK THE LOGO TO WATCH OUR SHORT TUTORIALS



Using the Provided Passcode to Unlock Tabs In Your Dashboard



Edit Your Tab Names Without Impacting Workbook Function



Correcting "#####" & Other Text Visibility With Column Width Adjustments



Adding Tabs That Will Link to Your Data Table & Dashboard

IN YOUR PRODUCT 'ABOUT' TAB

DSK

THERE IS AN ABOUT TAB IN EVERY WORKBOOK THAT INCLUDES IMPORTANT INFORMATION ABOUT YOUR DASHBOARD, AND USEFUL LINKS.

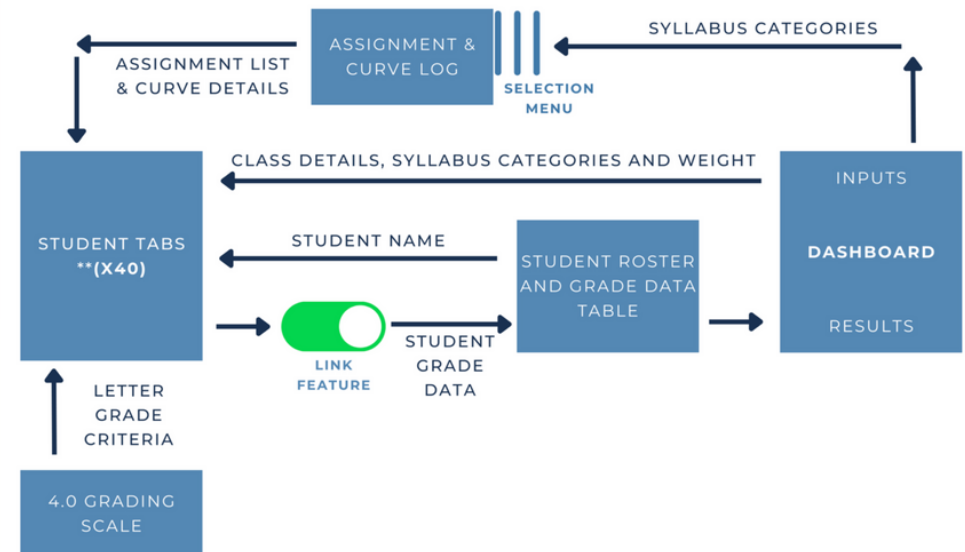
WE PROVIDE A HIGH LEVEL FLOW CHART FOR EVERY TOOL FOR A QUICK REFERENCE OF HOW IT ALL WORKS!

STUDENT GRADEBOOK AND ASSIGNMENT DASHBOARD

REVISION: 4.5

1	Password	Tabs are locked to prevent accidental errors to formulas: Password Key: "swc"
2	Tool Inputs	Your Inputs are the White Boxes With A Border!
3	Tool Inputs	Peach boxes are drop down menus
4	PDF Guide	**Use the downloaded guides to help you through the tool. You can Also visit our website anytime to view & download the
5	Site Link	https://spreadwiseco.com/
6	Google Sheets	This Dashboard is Not optimized for use with Google Sheets.
7	Support	**For support, message us on Etsy directly from your order, or send an email to Sales@SpreadWiseCo.com. Pictures are
8	Review	LOVE IT? CLICK & LEAVE US A REVIEW!

TOOL FLOW CHART



**DASHBOARD IS PRESET WITH (5) STUDENT TABS. BY SIMPLY MAKING A COPY OF THE TAB, YOU CAN QUICKLY LINK UP TO (40)

1 - GETTING STARTED

DSK

THIS JOURNEY BEGINS WITH THE DASHBOARD

MONTHLY RENTAL INCOME BOOKKEEPING DASHBOARD

Dashboard
Inputs

Choose Your Currency

USD

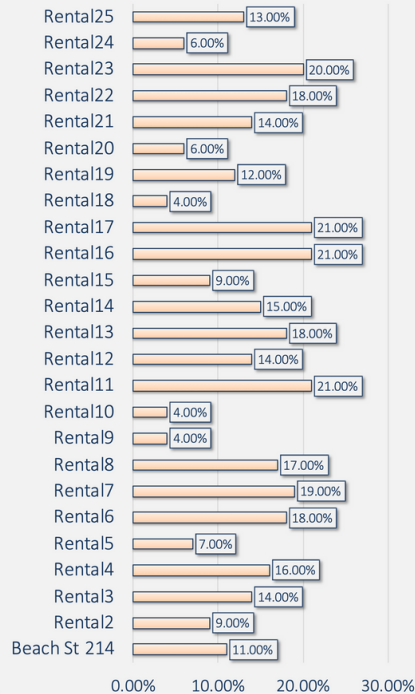
Period Start Date (dd/mm/yyyy)

1/1/2023

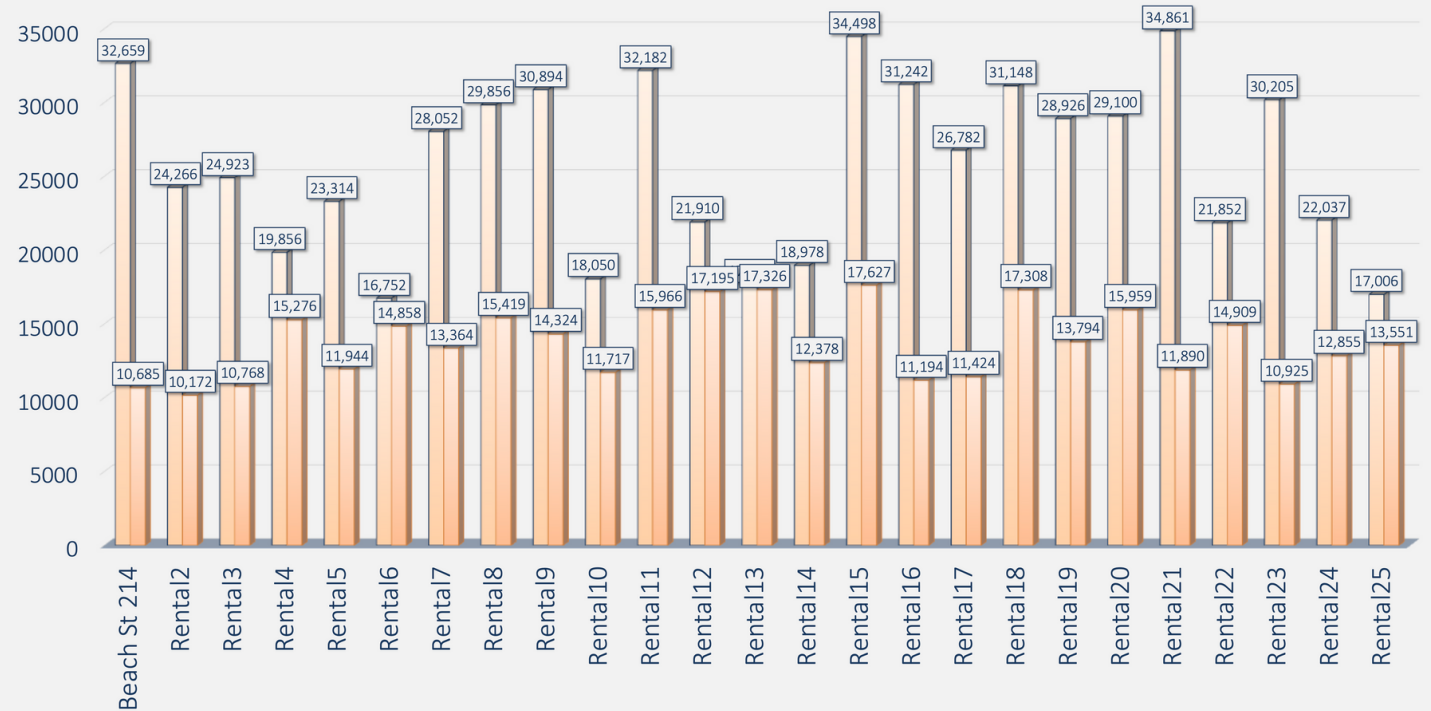
Period End Date (dd/mm/yyyy)

12/31/2024

Period Vacancy Rate



Period Income Vs Expenses



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2 - DASHBOARD INPUTS

DSK

SELECT YOUR CURRENCY

THIS WILL SET THE CURRENCY FOR THE ENTIRE WORKBOOK

SET YOUR TIME FRAME THAT YOU WANT THE GRAPHS TO DISPLAY. **YOU CAN CHANGE THIS AT ANY TIME**

MONTHLY RENTAL INCOME BOOKKEEPING DASHBOARD

Dashboard Inputs

Choose Your Currency

USD

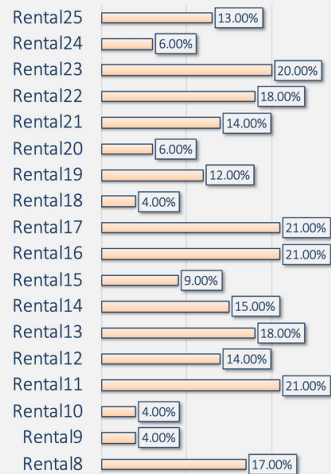
Period Start Date (dd/mm/yyyy)

1/1/2023

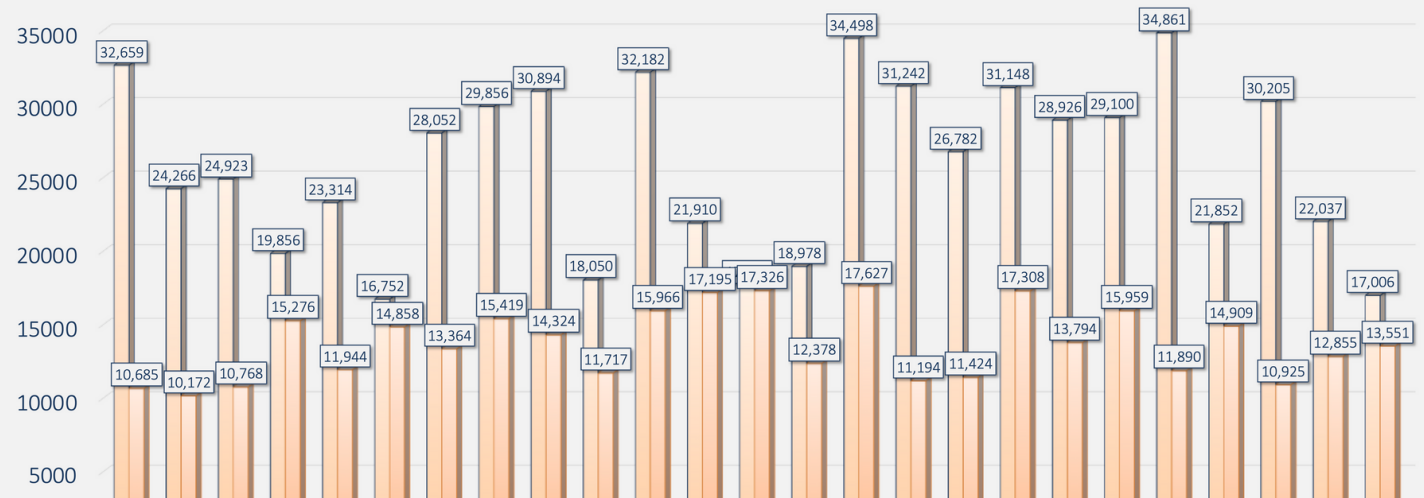
Period End Date (dd/mm/yyyy)

12/31/2024

Period Vacancy Rate



Period Income Vs Expenses



3 - RENTAL OVERHEAD BREAKDOWN

DSK

USE THIS TAB TO RECORD OVERHEAD COSTS THAT APPLY TO ALL OF YOUR RENTAL UNITS, BUT ARE PAID AS ONE. **IF YOU RECORD IT HERE, DO NOT RECORD THE SAME EXPENSE ON ANY OF THE INDIVIDUAL RENTAL TABS

EXAMPLES

- LAWN CARE
- INSURANCE POLICIES
- MAINTENANCE CONTRACTS

SHARED RENTAL BUSINESS OVERHEAD

LIST YOUR
TOTAL # OF
RESIDENTIAL
RENTALS YOU
WANT THE
OVERHEAD
COSTS TO
APPLY TO

AUTOMATIC
SPLIT OF
OVERHEAD
EXPENSES
ACROSS YOUR
RENTAL UNITS

SHARED RENTAL BUSINESS OVERHEAD

Total Rental Units

2

Average Monthly Cost Per Unit

\$166.67

USD

RENTAL OVERHEAD BREAKDOWN							
#	Short Description	Contractor, Vendor, Etc	Tax Category	Paid 'X' Times / Year	Paid Amount	Annualized Cost	Comments
1	Business License		Other	2	\$250.00	\$500.00	Business Licensing for City
2	Property Maintenance Contract		Other	1	\$1,000.00	\$1,000.00	
3	Lawn Care Service	Palmetto Lawn	Other	1	\$1,500.00	\$1,500.00	Annual contract Fee
4	LLC		Legal / Professional	1	\$1,000.00	\$1,000.00	Annual Service
5						\$-	
6						\$-	
7						\$-	
8						\$-	
9						\$-	
10						\$-	
11						\$-	
12						\$-	
13						\$-	
14						\$-	
15						\$-	
16						\$-	
17						\$-	
18						\$-	
19						\$-	
20						\$-	

4 - RENTAL TAB SETUP

- SET YOUR PROPERTY NAME
- MONTHLY RENT TARGET
- RENTAL SQUARE FEET

Rental Name	Beach St 214
Monthly Rent Amount	\$ 2,200.00
Rental Square Feet	1690
Current Rental Financing	
Original Loan Amount	\$ 200,000.00
Interest Rate	5.00%
Loan Term (Months)	360
Current Property Taxes & Insurance	
**Annual Taxes	\$ 2,500.00
**Annual Insurance	\$ 1,100.00

- FINANCING DETAILS
 - IF NOT FINANCED, SET LOAN AMOUNT TO \$0

ANNUAL PROPERTY TAXES & INSURANCE

5 - RENTAL TAB SETUP

Rental Property Valuation	
Property Balance	\$ 100,000.00
Property Value	\$ 250,000.00
Current Rent / Sq Ft	\$ 1.30
Current Equity	\$ 150,000

- PRINCIPAL LOAN BALANCE
- CURRENT MARKET VALUE

6 - RENTAL TAB - RENTAL INCOME & FEES

DSK

SET THE MONTH TO
START TRACKING
RENTAL INCOME

MONTHLY RENTAL INCOME

*FOR SOME RENTAL TYPES, YOU
MAY HAVE A SECONDARY INCOME
SOURCE, SUCH AS GOVERNMENT
ASSISSTANCE

RENTAL PAID
STATUS

MONTHLY FEE
REVENUE

MONTHLY INCOME & EXPENSE TRACKING

#	Month - Year	Income Source 1	Income Source 2	Paid Status	Fees Charged	Vacant? (Yes/No)	Total Expenses	Comments
1	August-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
2	September-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
3	October-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
4	November-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
5	December-23	\$ -	\$ -		\$ -	Yes	\$ 1,540.00	
6	January-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
7	February-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 4,040.00	
8	March-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
9	April-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
10	May-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
11	June-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
12	July-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
13	August-24	\$ -	\$ -		\$ -	Yes	\$ 1,540.00	
14	September-24	\$ -	\$ -		\$ -	Yes	\$ 1,540.00	
15	October-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
16	November-24	\$ 2,200.00	\$ -	Paid In Full	\$ 25.00	No	\$ 1,540.00	Late Fee
17	December-24	\$ 2,200.00	\$ -	Paid In Full	\$ 128.00	No	\$ 1,540.00	Pet Fee
18	January-25							
19	February-25							
20	March-25							
21	April-25							
22	May-25							

7 - RENTAL TAB - VACANCY

DSK

IF THE RENTAL WAS VACANT FOR THAT SET TO **YES**.
OTHERWISE, SET TO **NO**.

MONTHLY INCOME & EXPENSE TRACKING

#	Month - Year	Income Source 1	Income Source 2	Paid Status	Fees Charged	Vacant? (Yes/No)	Total Expenses	Comments
1	August-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
2	September-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
3	October-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
4	November-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
5	December-23	\$ -	\$ -		\$ -	Yes	\$ 1,540.00	
6	January-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
7	February-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 4,040.00	
8	March-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
9	April-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
10	May-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
11	June-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
12	July-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
13	August-24	\$ -	\$ -		\$ -	Yes	\$ 1,540.00	
14	September-24	\$ -	\$ -		\$ -	Yes	\$ 1,540.00	
15	October-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
16	November-24	\$ 2,200.00	\$ -	Paid In Full	\$ 25.00	No	\$ 1,540.00	Late Fee
17	December-24	\$ 2,200.00	\$ -	Paid In Full	\$ 128.00	No	\$ 1,540.00	Pet Fee
18	January-25							
19	February-25							
20	March-25							
21	April-25							
22	May-25							

8 - DETAILED EXPENSE TRACKER

DSK

USE THIS TABLE TO RECORD ANY UNPLANNED OR MISCELLANEOUS EXPENSES FOR EACH RENTAL PROPERTY

USE THE DROP DOWN MENU TO SELECT THE TAX CATEGORY FOR THE EXPENSE ITEM

DETAILED EXPENSE LOG								
#	Property	Date (mm/dd/yyyy)	Short Description	Contractor, Vendor, Etc	Tax Category	Total Cost	Receipt Filed	Comments
1	214 Beach Street	2/1/24	Refridgerator	Lowes	Office Expenses	\$ 2,500.00	Yes	
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								

Property Total	\$ 2,500.00
Tax Categories	Tax Category Total
Vehicle	\$ -
Home Office	\$ -
Communications	\$ -
Supplies	\$ -
Office Expenses	\$ 2,500.00
Startup Costs	\$ -
Assets	\$ -
Advertising	\$ -
Legal / Professional	\$ -
Other	\$ -
	\$ -
	\$ -
	\$ -
	\$ -

9 - DETAILED EXPENSE TRACKER

DSK

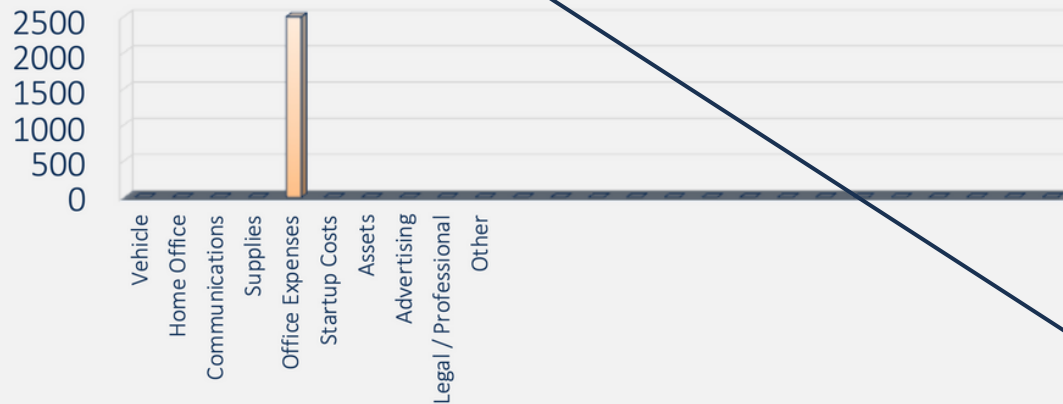
TAX FILTER RESULTS

USE THE DATES AND FILTER TO
REVIEW YOUR EXPENSE
BREAKDOWN BY TAX CATEGORY

DETAILED EXPENSE TRACKING

USD

Expenses By Tax Category



Tax Filter Start

1/1/2024

Tax Filter End

12/31/2024

Property Filter

214 Beach Street

DETAILED EXPENSE LOG

#	Property	Date (mm/dd/yyyy)	Short Description	Contractor, Vendor, Etc	Tax Category	Total Cost	Receipt Filed	Comments
1	214 Beach Street	2/1/24	Refridgerator	Lowes	Office Expenses	\$ 2,500.00	Yes	
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								

Property Total

\$ 2,500.00

Tax Categories

Tax Category Total

Vehicle	\$ -
Home Office	\$ -
Communications	\$ -
Supplies	\$ -
Office Expenses	\$ 2,500.00
Startup Costs	\$ -
Assets	\$ -
Advertising	\$ -
Legal / Professional	\$ -
Other	\$ -
	\$ -
	\$ -
	\$ -
	\$ -

10 - RENTAL TAB - MONTHLY EXPENSES

DSK

ON EACH RENTAL TAB, YOU'LL GET A FINANCING, TAX, & OH SUMMARY. USE THIS, ALONG WITH YOUR DETAILED EXPENSE TRACKING TO POPULATE YOUR TOTAL EXPENSES BY MONTH FOR EACH RENTAL

Monthly Financing	\$	1,074
Monthly Tax & Insurance	\$	300
Monthly Overhead	\$	167

MONTHLY EXPENSE TRACKING

MONTHLY INCOME & EXPENSE TRACKING								
#	Month - Year	Income Source 1	Income Source 2	Paid Status	Fees Charged	Vacant? (Yes/No)	Total Expenses	Comments
1	August-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
2	September-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
3	October-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
4	November-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
5	December-23	\$ -	\$ -		\$ -	Yes	\$ 1,540.00	
6	January-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
7	February-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 4,040.00	
8	March-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
9	April-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
10	May-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
11	June-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
12	July-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
13	August-24	\$ -	\$ -		\$ -	Yes	\$ 1,540.00	
14	September-24	\$ -	\$ -		\$ -	Yes	\$ 1,540.00	
15	October-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
16	November-24	\$ 2,200.00	\$ -	Paid In Full	\$ 25.00	No	\$ 1,540.00	Late Fee
17	December-24	\$ 2,200.00	\$ -	Paid In Full	\$ 128.00	No	\$ 1,540.00	Pet Fee
18	January-25							
19	February-25							
20	March-25							
21	April-25							
22	May-25							

YOU'LL GET TWO PERFORMANCE
BREAKDOWN TABLES

- 1.) PERFORMANCE BASED ON YOUR
DASHBOARD TIME PERIOD SELECTION
- 2.) PERFORMANCE FOR ALL TIME

PROFIT VALUES WILL EITHER BE GREEN
OR RED, DEPENDING ON OVERALL
PERFORMANCE.

Avg Time-Period Performance		
Start	8/1/2023	
End	12/31/2025	
Avg Monthly Income	\$	1,821
Avg Monthly Expenses	\$	1,687
Net Monthly Profit	\$	134
Average Vacancy Rate	17.65%	
All Time Performance		
Income	\$	30,953
Expenses	\$	28,680
Net Profit	\$	2,273
Vacancy	17.65%	

12 - RENTAL TAB - DASHBOARD LINK

DSK

THIS LINK BUTTON IS WHAT TIES THE RENTAL TAB DATA TO YOUR OVERALL DASHBOARD. OUR DASHBOARD SUPPORTS 25 RENTALS LINKED AT ANY GIVEN TIME. **HOWEVER, YOU CAN HAVE MANY MORE RENTAL TABS THAN 25...**

214	
Performance	
8/1/2023	
12/31/2025	
	1,821
	1,687
	134
	17.65%
Performance	
	30,953
	28,680
	2,273
	17.65%

LINK TO DASHBOARD

Yes

13 - ADDING RENTAL TABS

RentalOverhead

Rental1

Rental2

RentalTemplate

1.) RIGHT CLICK ON THE TEMPLATE & MAKE A COPY, OR HOWEVER MANY COPIES YOU NEED.

2.) RIGHT CLICK ON THE NEW TAB TO CHANGE THE NAME OF THE TAB.

3.) SET THE TAB NAME TO MATCH THE NEXT SEQUENTIAL PROPERTY TAB NUMBER FROM THE DASHBOARD EXACTLY.

- ONCE THE TAB IS ADDED AND RENAMED, IT WILL AUTO-LINK TO YOUR DASHBOARD AND DATA TABLE

Insert Sheet

Delete

Rename

Move or Copy...

View Code

Protect Sheet...

Tab Color

Hide

Insert Sheet

Delete

Rename

Move or Copy...

View Code

Protect Sheet...

Tab Color

Property Tab

Rental1

Rental2

Rental3

Rental4

Rental5

Rental6

Rental7

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