SpreadWiseCo™

Spreadsheets Reimagined

REALTOR DASHBOARD GUIDE

5.0 - 11/28/2024

BUILT WITH MICROSOFT EXCEL

ABOUT THIS GUIDE

These tools are designed to be easy to use, with minimal inputs from you, and many outputs from us. Follow each tool guide closely. There are normally only a few true steps within the guide, but the rest is information to help you along the way.

GUIDE LEGEND

GUIDE POINTERS

NEED TO KNOW

NICE TO KNOW

FOR THOSE READY TO JUMP IN QUICKLY

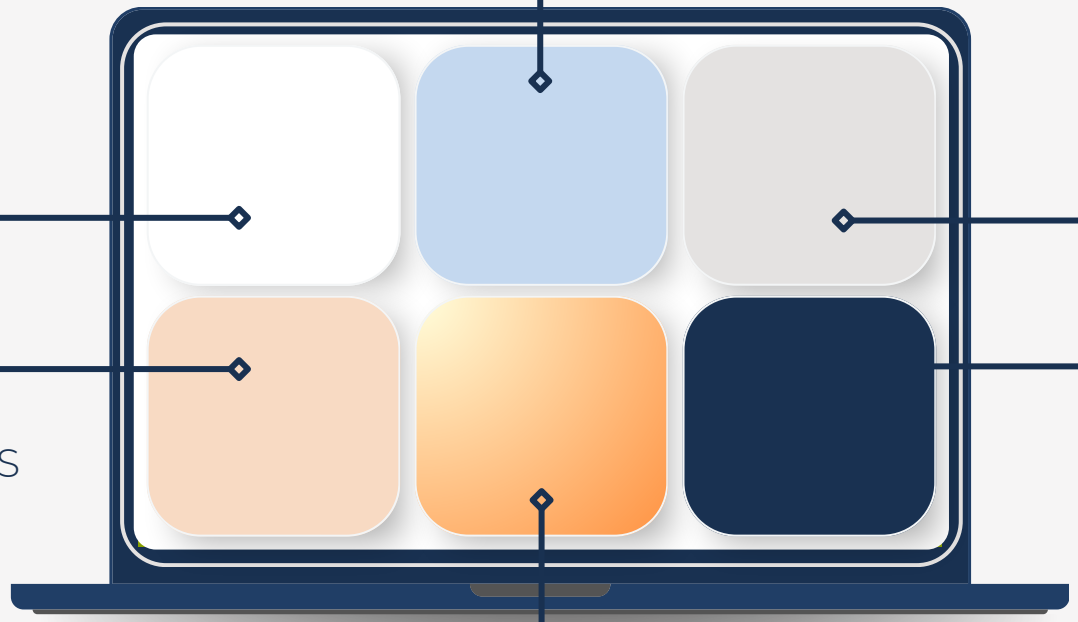
SK — YOU CAN SKIP AND COME BACK

DSK — 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.

OUR COLOR PALLET LEGEND



*KEY OUTPUTS HIGHLIGHTED

USER FIELDS

USER FIELDS, AUTOMATED MENUS

*THE CELLS THAT DO THE WORK

FOCUS OF THE FILE AND THE TABS

CHARTS: THE DASHBOARD STORY

*ADDITIONAL COLORS MAY BE USED WHERE NEEDED

IN YOUR PRODUCT 'ABOUT' TAB

DSK

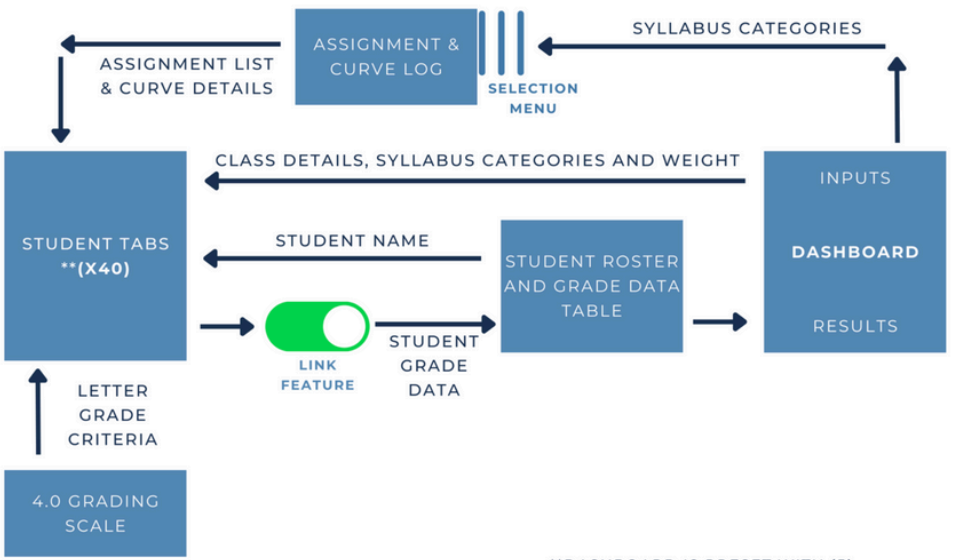
THERE IS AN ABOUT TAB IN EVERY WORKBOOK THAT INCLUDES IMPORTANT INFORMATION ABOUT YOUR DASHBOARD, AND USEFUL LINKS.

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



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PRODUCT FEATURES & LEARNING TIME

PRODUCT FEATURES

- DETAILED **EXPENSE TRACKING** FOR EACH PROPERTY
- **SALE PRICE TRENDING** FOR YOUR PROPERTIES
- **INSIGHT** TO IMPROVE YOUR HOME SALES AND INCOME!
- DETAILED **COMMISSIONS TRACKING** FOR EACH PROPERTY
- **COMMISSION % TRENDING** FOR YOUR PROPERTIES
- FOUR INTEGRATED **CURRENCIES** *(USD, EUR, GBP, CAD)*
- BUILT-IN READY-TO-PRINT **TO DO LIST**
- TOTAL **COMMISSIONS BY MONTH** FOR ANY 12 MONTH PERIOD
- BUILT IN **GUIDE NOTES**
- INTEGRATED **OFFER REVIEW** FOR YOUR SELLERS
- UP TO **25 PROPERTIES** IN ONE DASHBOARD

LEARNING & SETUP TIME

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

TABS, GUIDES, COMPATABILITY

TABS & GUIDES

- PROPERTY TABS *(*X3)*
- SELLER OFFER REVIEW
- TOOL FLOW CHART
- PROPERTY DATA TABLE & SUMMARY
- PERFORMANCE DASHBOARD
- MARKET PREP / TO-DO LIST
- PDF GUIDE

***Includes **(3)** Property 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***

COMPATABILITY

- [x] BUILT WITH EXCEL 365 FOR MAC
- [x] 2016 OR NEWER VERSIONS OF EXCEL
- [x] EXCEL VERSIONS OLDER THAN 2016'
- [x] MOBILE VERSIONS OF EXCEL
- [ ] GOOGLE SHEETS

Enjoy Your Dashboard!

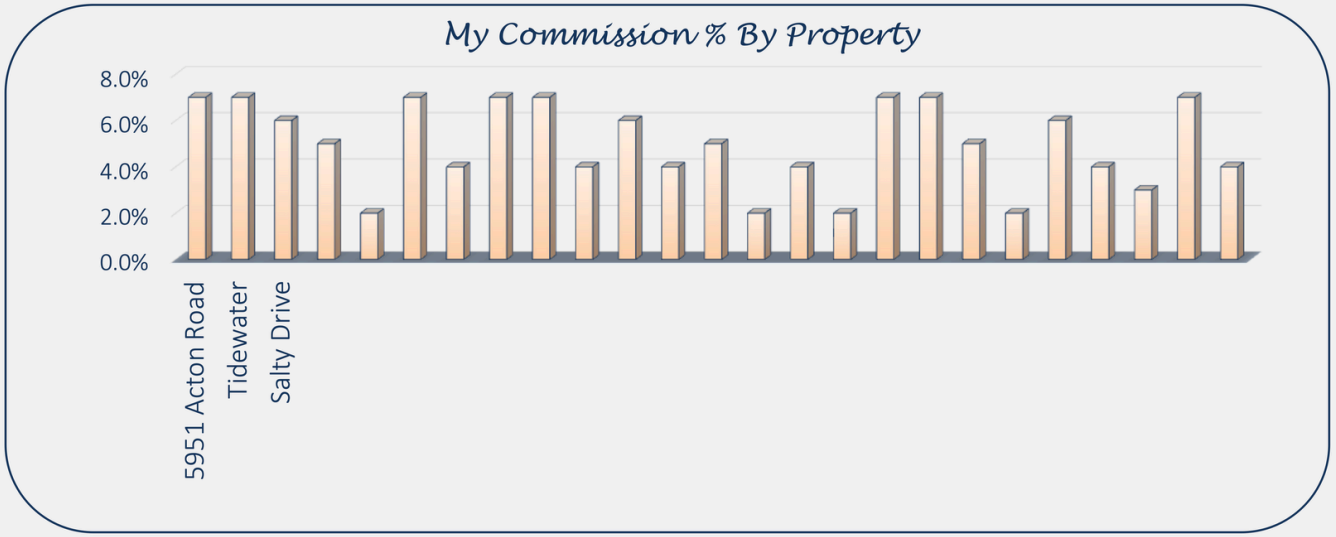
1 - GETTING STARTED

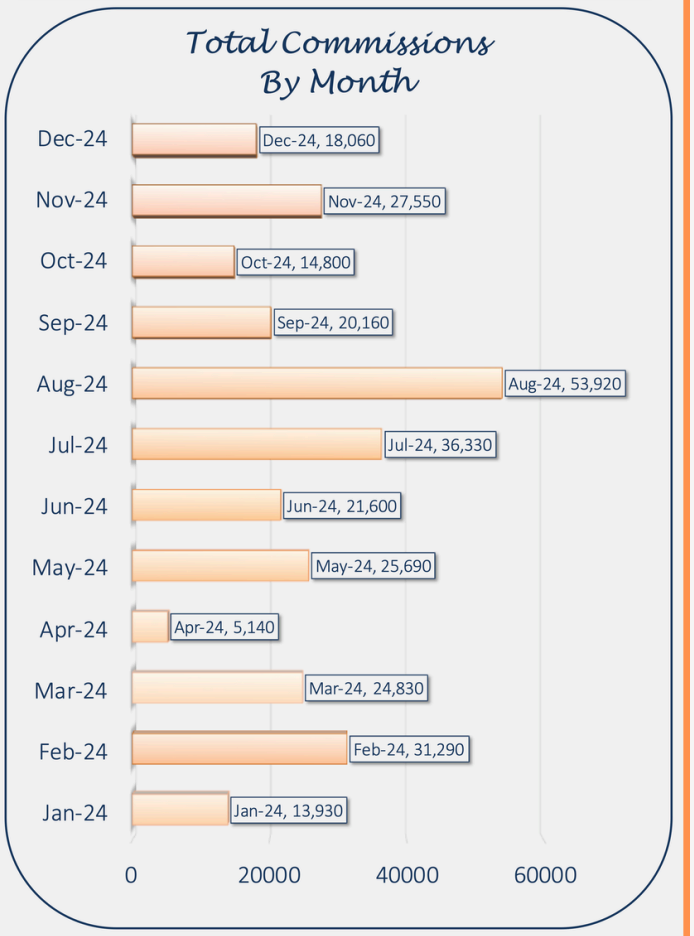
DSK

THIS JOURNEY BEGINS WITH THE DASHBOARD

REALTOR EXPENSES & COMMISSIONS DASHBOARD

Dashboard Inputs	Choose Your Currency	USD	Commissions Trend Start Date (mm/yyyy)	Jan-24





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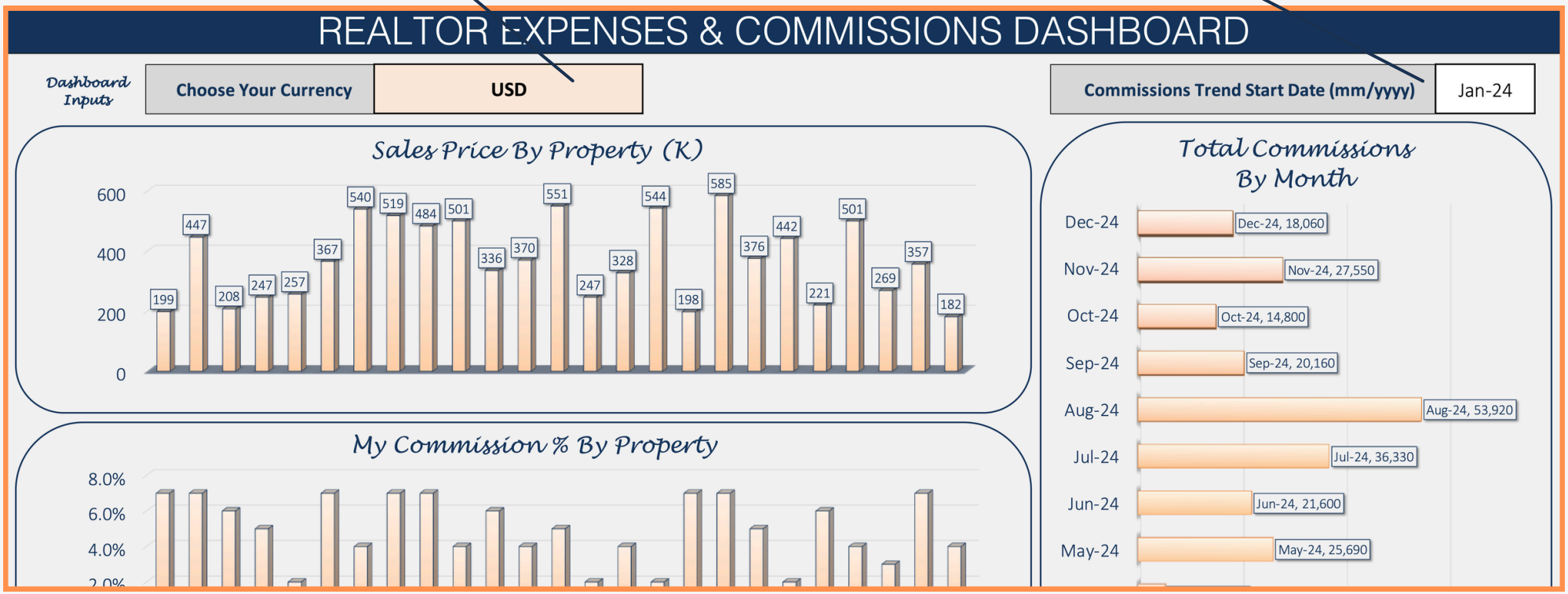
2 - DASHBOARD INPUTS

SELECT YOUR CURRENCY

THIS WILL SET THE CURRENCY FOR THE ENTIRE WORKBOOK

SET YOUR STARTING MONTH FOR YOUR 12 MONTH COMMISSIONS TREND GRAPH



3 - EXPENSE TRACKING

SET YOUR PROPERTY NAME

SET YOUR EXPENSE BUDGET

EXPENSE TRACKING

5951 Acton Road

Property Name	5951 Acton Road
Expense Budget	$ 500.00
Total Expenses	$ 55.00
Commissions	$ 5,125.00
% Commissions	2.50%

USD

LINK TO DASHBOARD: Yes

Sales Price	$ 205,000.00
Total Commission %	5.00%
Total Commissions	$ 10,250.00
My % Of Commissions	50.00%
My Property Earn	$ 5,125.00

Actual Sale Date (mm/dd/yyyy): 1/15/24

#	Date (MM/DD/YYYY)	Vendor	Expense / Tax Category	Total Cost	Receipt Filed	Description	Additional Comments
1	1/1/24	Gas Station	Vehicle	$ 55.00	Yes	Fuel For Travel	
2				$ -			
3				$ -			
4				$ -			
5				$ -			
6				$ -			
7				$ -			
8				$ -			
9				$ -			
10				$ -			
11				$ -			
12				$ -			
13				$ -			
14				$ -			

Tax Category (Drop Down List)
Vehicle
Home Office
Communications
Supplies
Office Expenses
Startup Costs
Assets
Advertising
Legal & Professional Fees
Other

4 - EXPENSE TRACKING

VENDOR / LOCATION

EXPENSE COST

EXPENSE DESCRIPTION AND COMMENTS

TAX CATEGORY. THIS IS A DROP DOWN MENU BASED ON THE TAX CATEGORY LIST. THIS SIMPLIFIES TAX RECORDING LATER!

RECEIPT FILED FOR TAX PURPOSES? YES OR NO

DATE OF EXPENSE

EXPENSE TRACKING — 5951 Acton Road

Property Name	5951 Acton Road
Expense Budget	$ 500.00
Total Expenses	$ 55.00
Commissions	$ 5,125.00
% Commissions	2.50%

USD

LINK TO DASHBOARD: Yes

Sales Price	$ 205,000.00
Total Commission %	5.00%
Total Commissions	$ 10,250.00
My % Of Commissions	50.00%
My Property Earn	$ 5,125.00

Actual Sale Date (mm/dd/yyyy): 1/15/24

#	Date (MM/DD/YYYY)	Vendor	Expense / Tax Category	Total Cost	Receipt Filed	Description	Additional Comments	Tax Category (Drop Down List)
1	1/1/24	Gas Station	Vehicle	$ 55.00	Yes	Fuel For Travel		Vehicle
2				$ -				Home Office
3				$ -				Communications
4				$ -				Supplies
5				$ -				Office Expenses
6				$ -				Startup Costs
7				$ -				Assets
8				$ -				Advertising
9				$ -				Legal & Professional Fees
10				$ -				Other
11				$ -				
12				$ -				
13				$ -				
14				$ -				

5 - COMMISSION TRACKING

DSK

SALE PRICE

TOTAL COMMISSIONS TO BE PAID BY SELLER

WHAT % OF THE COMMISSIONS WILL YOU GET?

ACTUAL SALES DATE

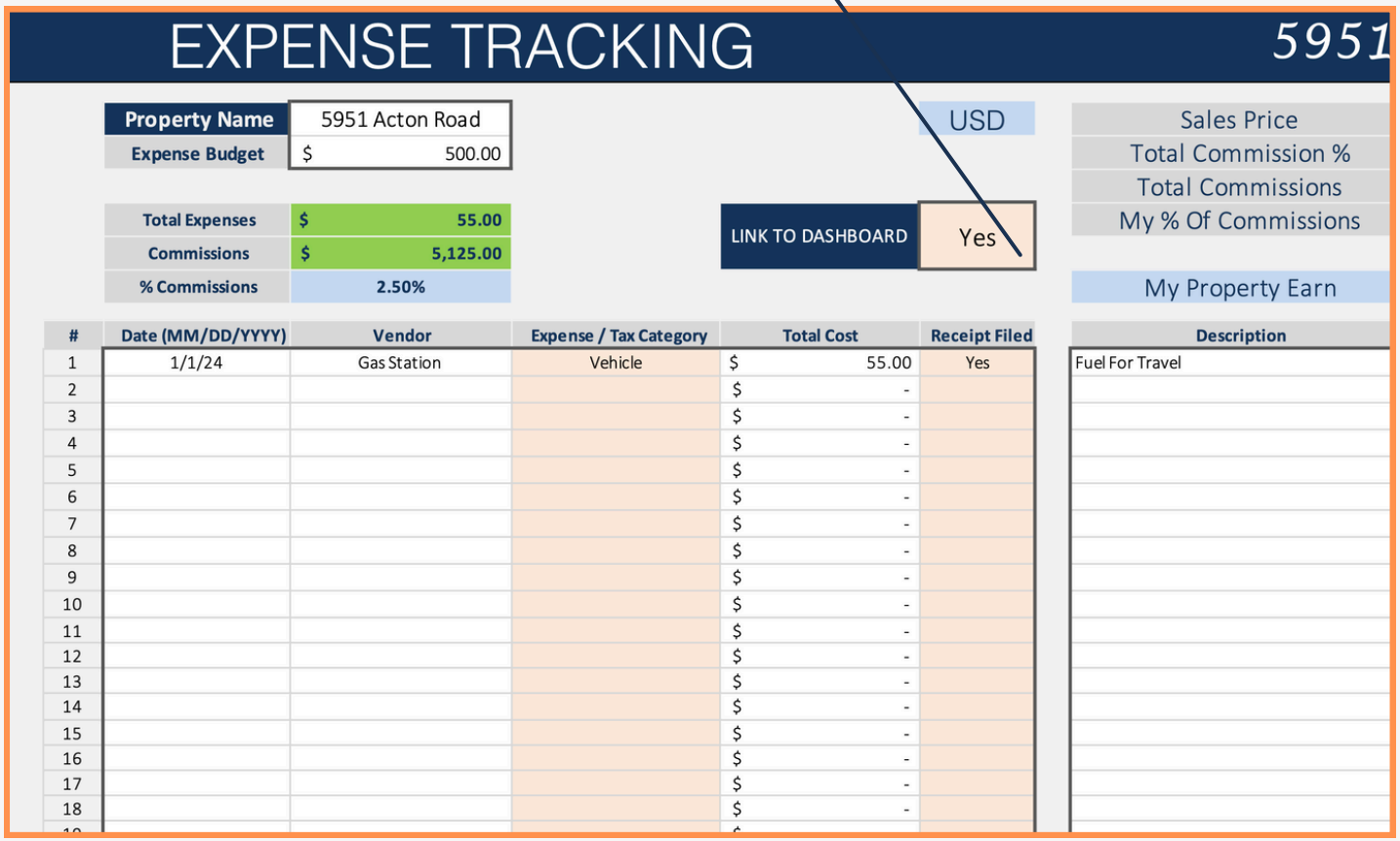
5951 Acton Road

USD	Sales Price	$ 205,000.00	Actual Sale Date (mm/dd/yyyy)
	Total Commission %	5.00%	1/15/24
	Total Commissions	$ 10,250.00	
TO DASHBOARD Yes	My % Of Commissions	50.00%	
	My Property Earn	$ 5,125.00	

Total Cost	Receipt Filed	Description	Additional Comments	Tax Category (Drop Down List)
55.00	Yes	Fuel For Travel		Vehicle
-				Home Office
-				Communications
-				Supplies
-				Office Expenses
-				Startup Costs
-				Assets
-				Advertising
-				Legal & Professional Fees
-				Other
-				
-				
-				
-				

6 - DASHBOARD LINK

THE DASHBOARD LINK ALLOWS YOU QUICKLY DISCONNECT/CONNECT A PROPERTY EXPENSES AND COMMISSIONS FROM YOUR OVERALL DASHBOARD.



EXPENSE TRACKING 5951

Property Name	5951 Acton Road
Expense Budget	$ 500.00
Total Expenses	$ 55.00
Commissions	$ 5,125.00
% Commissions	2.50%

USD

LINK TO DASHBOARD: Yes

Sales Price
Total Commission %
Total Commissions
My % Of Commissions

My Property Earn

#	Date (MM/DD/YYYY)	Vendor	Expense / Tax Category	Total Cost	Receipt Filed	Description
1	1/1/24	Gas Station	Vehicle	$ 55.00	Yes	Fuel For Travel
2				$ -		
3				$ -		
4				$ -		
5				$ -		
6				$ -		
7				$ -		
8				$ -		
9				$ -		
10				$ -		
11				$ -		
12				$ -		
13				$ -		
14				$ -		
15				$ -		
16				$ -		
17				$ -		
18				$ -		

7 - TO-DO LIST

WE HAVE A BUILT IN TO-DO LIST TO HELP YOU STAY ORGANIZED. SET UP YOUR LIST, THEN PRINT FOR ON-THE-GO TRACKING!

MARKET PREPARTION & PROPERTY TO-DO LIST

5951 Acton Road

To - Do	Due Date (mm/dd/yyyy)	Responsible	Comments & Details
Closing	11/1/24	Seller Agent	
Follow Up, Thank You Card for Buyer/Seller	11/7/24	Seller Agent	

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8 - OFFER REVIEW AND ASSESSMENT

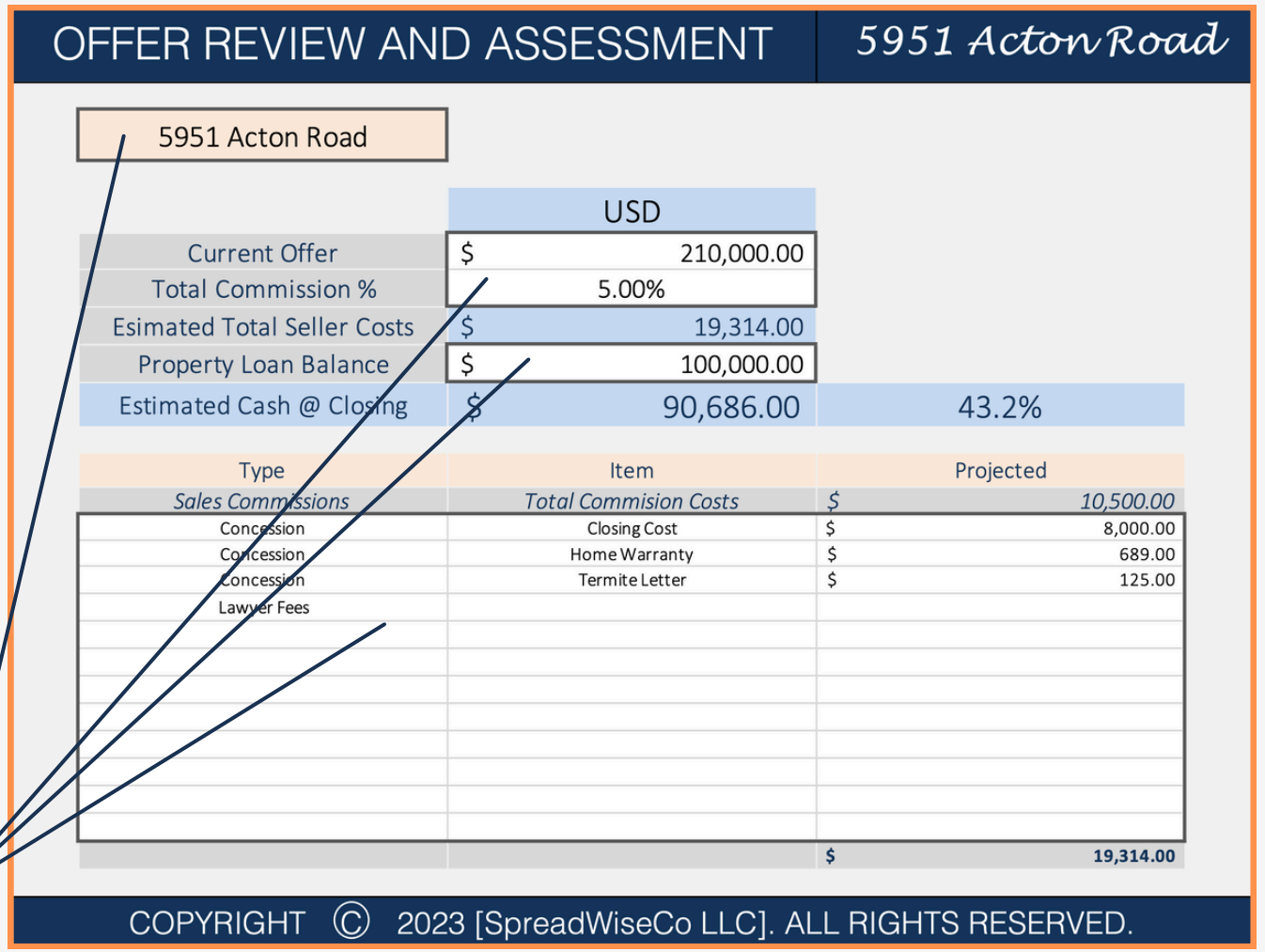
DSK

SELLER WANTS TO KNOW THEIR POSSIBLE CASH BEFORE LISTING?

NEED TO REVIEW AN OFFER WITH THE SELLER?

THIS IS A GREAT TOOL TO HAVE READILY ON HAND!!

SELECT THE PROPERTY, FILL OUT THE DETAILS, AND PRINT/EMAIL!



OFFER REVIEW AND ASSESSMENT — 5951 Acton Road

5951 Acton Road

	USD	
Current Offer	$ 210,000.00	
Total Commission %	5.00%	
Esimated Total Seller Costs	$ 19,314.00	
Property Loan Balance	$ 100,000.00	
Estimated Cash @ Closing	$ 90,686.00	43.2%

Type	Item	Projected
Sales Commissions	*Total Commision Costs*	*$ 10,500.00*
Concession	Closing Cost	$ 8,000.00
Concession	Home Warranty	$ 689.00
Concession	Termite Letter	$ 125.00
Lawyer Fees		
		$ 19,314.00

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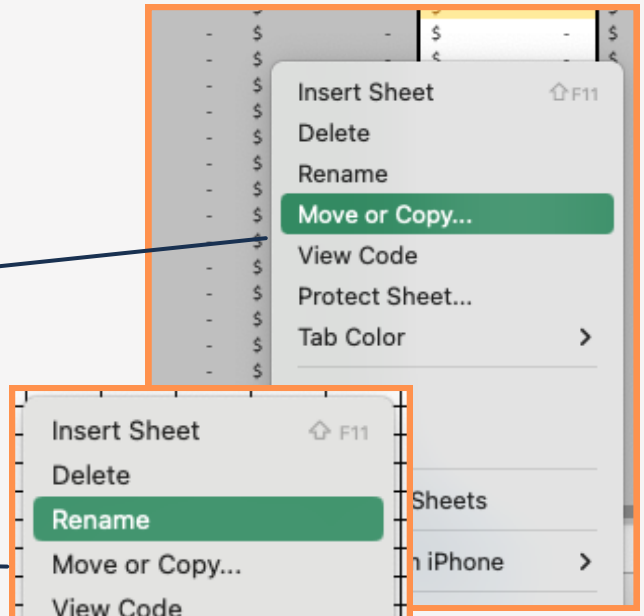
8 - ADDING PROPERTY TABS

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 DATA TABLE EXACTLY.

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

Property Tab
Property1
Property2
Property3
Property4
Property5
Property6
Property7
Property8

IMPORTANT

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