

HOME BUDGET DASHBOARD GUIDE

4.0 - 8/17/24

Spreadsheets Reimagined



SpreadWiseCo™

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



YOU CAN SKIP
AND COME
BACK 😊



DON'T SKIP!

TOOL USER INPUTS

INPUT BOX

DROP DOWN
MENU

**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.

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

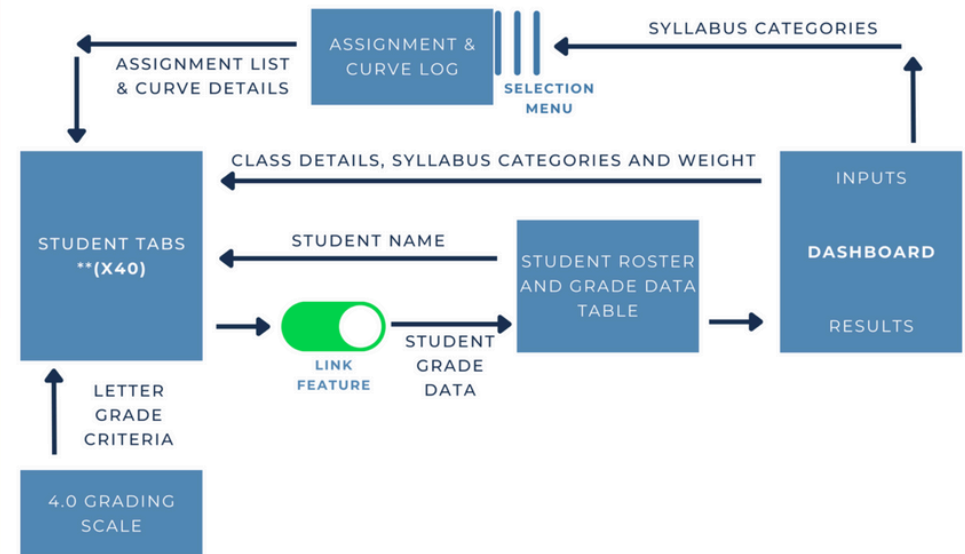
WE PROVIDE A HIGH LEVEL FLOW CHART FOR EVERY TOOL FOR A QUICK REFERENCE OF HOW IT ALL WORKS!

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)**

BUILT WITH



Microsoft
Excel 365

COMPATABILITY



All Microsoft
Excel Versions

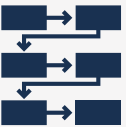


Not Compatible
with Google
Sheets

PRODUCT GUIDES



Detailed PDF
Guide



Detailed Tool
Flow Chart

VIDEO TUTORIALS



Not Yet Available

CURRENCY

\$ USD
€ EUR
£ GBP
CAD

Four Integrated
Currencies

TABS

- About & Flow Chart
- Dashboard
- Current Home Tab
- New Home Tab **** (x9)**

**Dashboard is preset with (2) new home tabs. By simply making a copy of the tab, you can quickly link up to (9).

SETUP/LEARNING CURVE



1 - GETTING STARTED



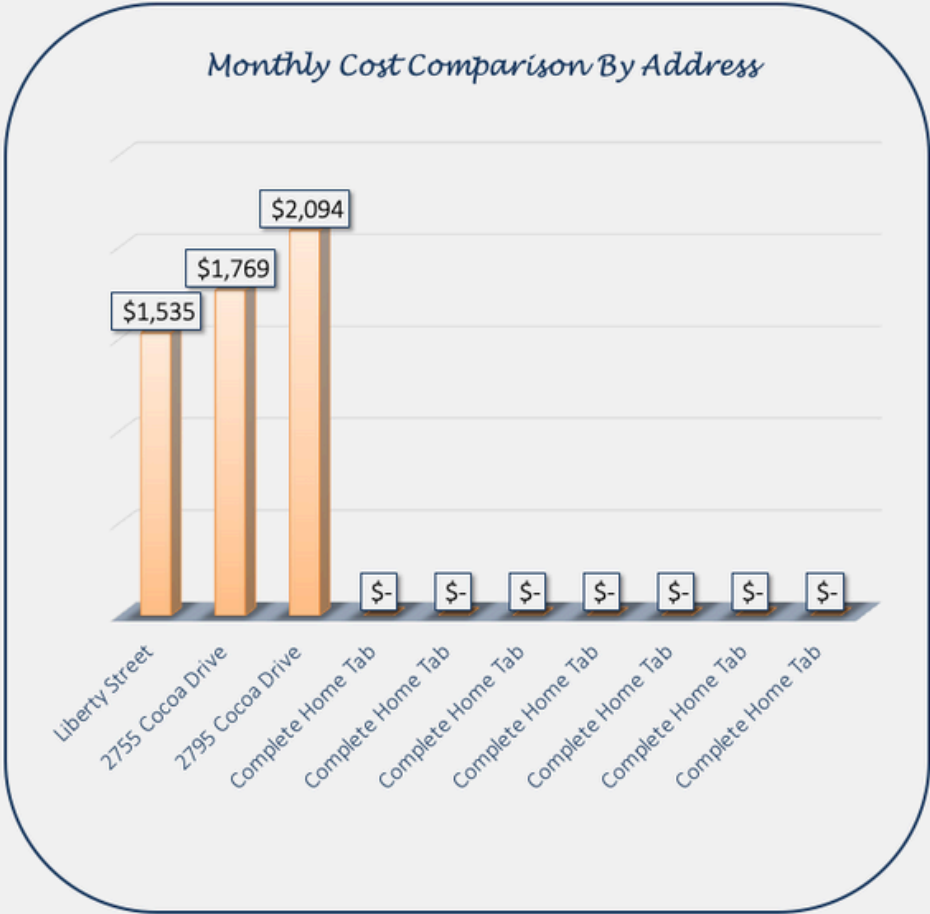
THIS JOURNEY BEGINS WITH FILLING OUT THE DASHBOARD

HOME BUDGET & BUYING GUIDE

Dashboard Inputs Choose Your Currency **USD** Current Monthly Take Home Pay \$ 5,500.00

Dashboard Results	Highest Monthly Cost	\$ 2,094
	Lowest Monthly Cost	\$ 1,535

Home Tab Name	Home Description	Mortgage	Monthly Cost	% Take Home
CurrentHome	Liberty Street	\$ 1,435	\$ 1,535	27.9%
NewHome1	2755 Cocoa Drive	\$ 1,388	\$ 1,769	32.2%
NewHome2	2795 Cocoa Drive	\$ 1,728	\$ 2,094	38.1%
NewHome3	Complete Home Tab	Add New Home Tab	Add New Home Tab	Add New Home Tab
NewHome4	Complete Home Tab	Add New Home Tab	Add New Home Tab	Add New Home Tab
NewHome5	Complete Home Tab	Add New Home Tab	Add New Home Tab	Add New Home Tab
NewHome6	Complete Home Tab	Add New Home Tab	Add New Home Tab	Add New Home Tab
NewHome7	Complete Home Tab	Add New Home Tab	Add New Home Tab	Add New Home Tab
NewHome8	Complete Home Tab	Add New Home Tab	Add New Home Tab	Add New Home Tab
NewHome9	Complete Home Tab	Add New Home Tab	Add New Home Tab	Add New Home Tab
Average		\$ 1,517	\$ 1,799	32.7%



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2 - DASHBOARD



THE DASHBOARD TABLE AND CHARTS WILL POPULATE AUTOMATICALLY

SET YOUR CURRENCY TYPE

**OPTIONAL SET YOUR CURRENT MONTHLY TAKE HOME

HOME BUDGET & BUYING GUIDE

Dashboard Inputs
Choose Your Currency
USD
Current Monthly Take Home Pay
\$ 5,500.00

Dashboard Results

Highest Monthly Cost	\$ 2,094
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NewHome5	Complete Home Tab	Add New Home Tab	Add New Home Tab	Add New Home Tab
NewHome6	Complete Home Tab	Add New Home Tab	Add New Home Tab	Add New Home Tab
NewHome7	Complete Home Tab	Add New Home Tab	Add New Home Tab	Add New Home Tab
NewHome8	Complete Home Tab	Add New Home Tab	Add New Home Tab	Add New Home Tab
NewHome9	Complete Home Tab	Add New Home Tab	Add New Home Tab	Add New Home Tab
Average		\$ 1,517	\$ 1,799	32.7%

Monthly Cost Comparison By Address

Address	Monthly Cost
Liberty Street	\$1,535
2755 Cocoa Drive	\$1,769
2795 Cocoa Drive	\$2,094
Complete Home Tab	\$-
Complete Home Tab	\$-
Complete Home Tab	\$-
Complete Home Tab	\$-
Complete Home Tab	\$-
Complete Home Tab	\$-
Complete Home Tab	\$-

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3 - CURRENT HOME



FINANCING DETAILS

MONTHLY INSURANCE COST

- PMI
- HMI
- FLOOD

CURRENT ANNUAL PROPERTY TAXES

**OPTIONAL INFO

MONEY OWED, AND ESTIMATED RESALE VALUE

<i>Liberty Street</i>		
TOTAL COST OF HOME		
Total Monthly Mortgage Payment	\$ 1,435.02	
Home Cost / Year	\$ 18,424.29	
Home Cost / Month	\$ 1,535.36	
% of Monthly Take Home	27.92%	
FINANCING		
Original Amount Borrowed	\$ 180,000.00	
Annual Percentag Rate (APR)	6.00%	
Loan Term (Months)	360	
Monthly Payment <u>Excluding Escrow</u>	\$ 1,079.19	
Annual Payment Cost	\$ 12,950.29	
INSURANCE		
Annual Private Mortgage Insurance Cost	\$ 960.00	
Monthly PMI Cost	\$ 80.00	<input type="checkbox"/> Yes
Annual Home Owner's Insurance Cost	\$ 1,600.00	
Monthly HMI Cost	\$ 133.33	<input type="checkbox"/> Yes
Annual Flood Insurance Cost	\$ 360.00	
Monthly FI Cost	\$ 30.00	<input type="checkbox"/> Yes
Total Monthly Insurance Cost	\$ 213.33	
PROPERTY TAXES		
Annual Property Tax Cost	\$ 1,100.00	
Monthly Tax Cost	\$ 91.67	<input type="checkbox"/> Yes
PROPERTY TAXES		
Remaining Loan Balance	\$ 10,000	
Estimated Resale Value	\$ 225,000	
Net Equity	\$ 215,000	
Choose Your Currency		
USD		
CURRENT HOME ADDRESS		
Liberty Street		
HOA FEES		
Annual HOA Fee	\$ 250.	
Monthly HOA Fee	\$ 20.	
ESSENTIAL UTILITIES		
Monthly Electric Cost	\$ 200.	
Monthly Natural Gas Cost	\$ 40.	
Monthly Water / Sewer Cost	\$ 40.	
Monthly Trash / Recycling Cost	\$ 12.	
Total Annual Utility Cost	\$ 144.	
MAINTENANCE & OTHER FEES		
Annual Landscaping Cost	\$ 900.	
Monthly Landscaping Cost	\$ 75.	
Annual AC Maintenance Cost	\$ 160.	
Monthly AC Maintenance Cost	\$ 13.	
Other Annual Cost	\$ -	
Other Monthly Cost	\$ -	
**INCLUDE IN TOTAL MORTGAGE PAYMENT, CELL C4		
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4 - CURRENT HOME



HOME ADDRESS

UTILITY COST DETAILS

MAINTENANCE AND OTHER ANNUAL COSTS THAT SHOULD BE ACCOUNTED FOR

- LANDSCAPING
- AC MAINTENANCE
- ETC

Liberty Street

	Choose Your Currency	USD
CURRENT HOME ADDRESS	Liberty Street	
HOA FEES		
Annual HOA Fee	\$	250.00
Monthly HOA Fee	\$	20.83
		<input type="checkbox"/> Yes
ESSENTIAL UTILITIES		
Monthly Electric Cost	\$	200.00
Monthly Natural Gas Cost	\$	40.00
Monthly Water / Sewer Cost	\$	40.00
Monthly Trash / Recycling Cost	\$	12.00
Total Annual Utility Cost	\$	144.00
MAINTENANCE & OTHER FEES		
Annual Landscaping Cost	\$	900.00
Monthly Landscaping Cost	\$	75.00
Annual AC Maintenance Cost	\$	160.00
Monthly AC Maintenance Cost	\$	13.33
Other Annual Cost	\$	-
Other Monthly Cost	\$	-

**INCLUDE IN TOTAL MORTGAGE PAYMENT, CELL C4

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1,435.02
8,424.29
1,535.36

0,000.00

1,079.19
2,950.29

960.00

Yes

80.00

Yes

1,600.00

Yes

133.33

360.00

Yes

30.00

213.33

1,100.00

Yes

91.67

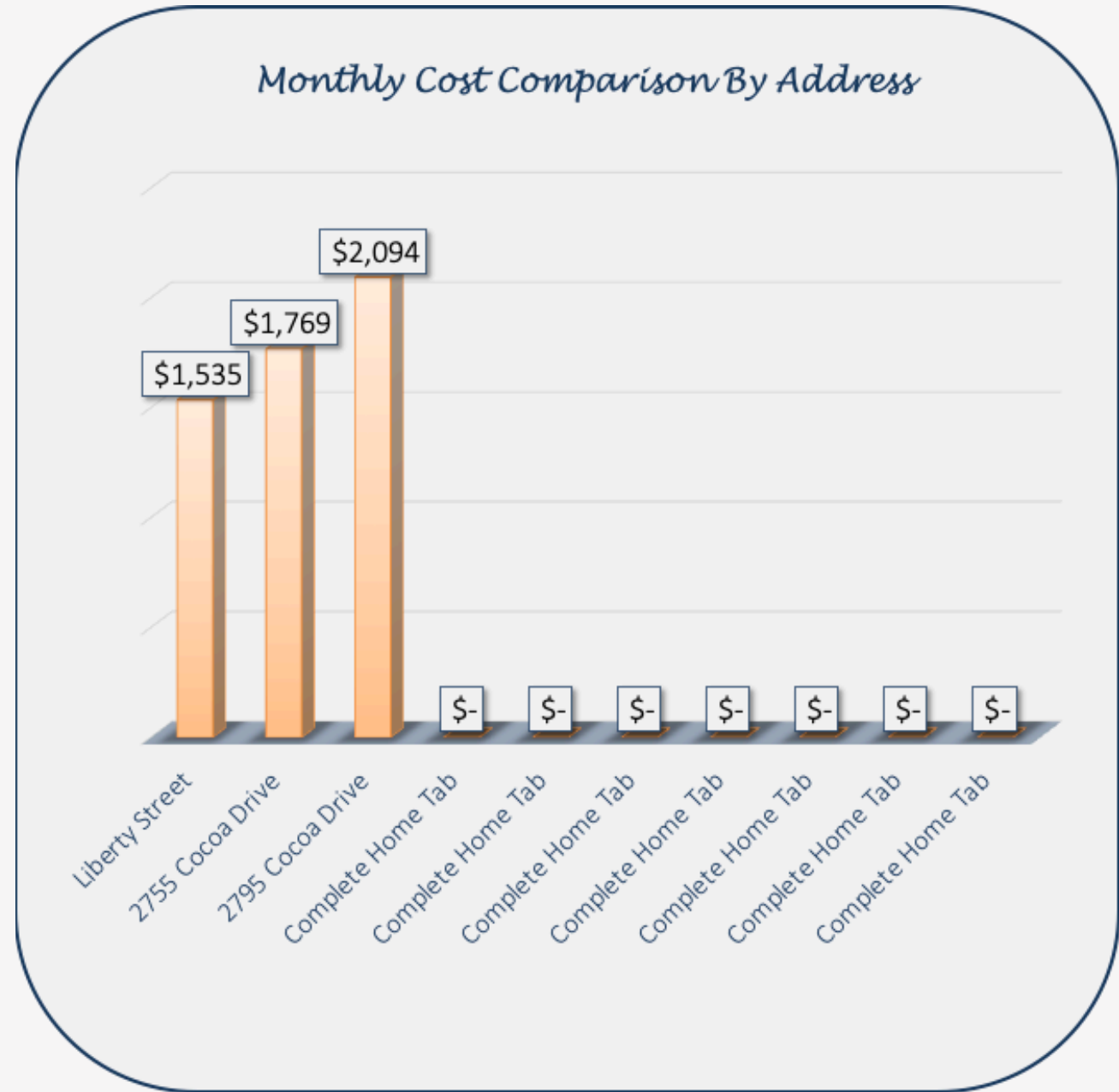
10,000

225,000

215,000

REPEAT THE SAME STEPS FOR ANY NEW HOMES YOU ARE CONSIDERING
PURCHASING

SEE A SIDE BY SIDE COMPARISON OF EACH HOME, SHOWN AS AN ACTUAL MONTHLY COST!



7 - ADDING HOME TABS

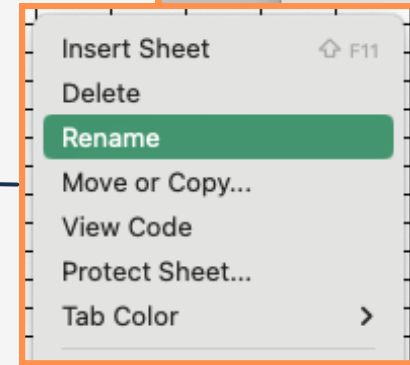
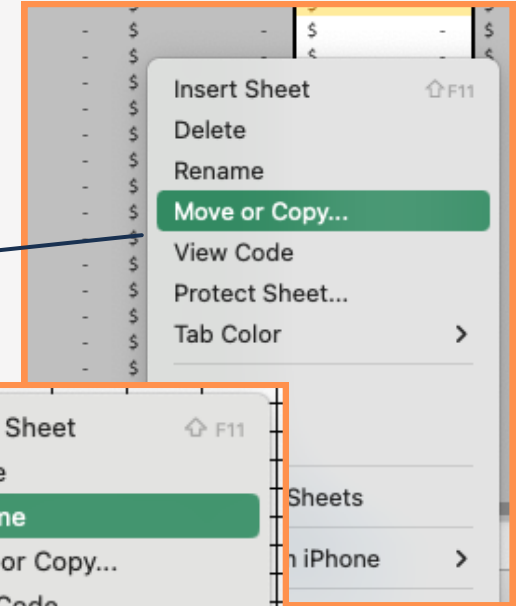


1.) RIGHT CLICK ON A HOME TAB & MAKE A COPY, OR HOWEVER MANY COPIES YOU NEED.

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

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

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



IMPORTANT

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