

JOB ESTIMATE DASHBOARD GUIDE

4.0 - 6/27/24

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.

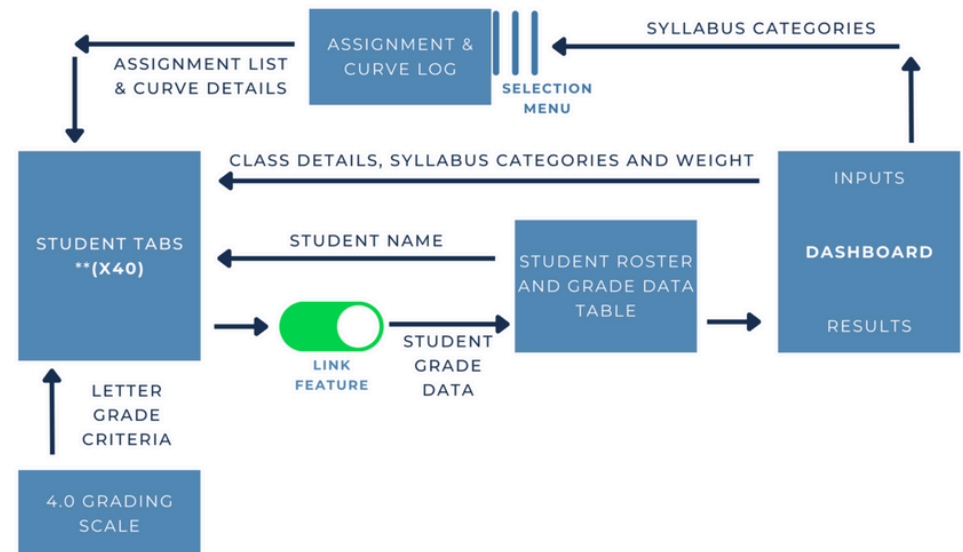
WE PROVIDE A HIGH LEVEL FLOW CHART FOR EVERY TOOL FOR A QUICK REFERENCE OF HOW IT ALL WORKS!

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)**

1 - GETTING STARTED



THIS JOURNEY BEGINS WITH FILLING OUT THE ESTIMATE LIST SUMMARY TAB

ESTIMATE LIST
Stone & Grain

Dashboard
Inputs

Choose Your Currency

USD

% Profit Margin Goal

15.00%

Business Name

Stone & Grain

1/1/24

12/31/24

Estimate Tab	Estimate Name	Estimate	Actual Sale Price	Delivery Date
Estimate1	Entertainment Center	\$ 1,462.61	\$ 1,100.00	5/10/24
Estimate2	Granite Table	\$ 1,137.16	\$ 1,200.00	6/15/24
Estimate3	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab
Estimate4	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab
Estimate5	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab
Estimate6	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab
Estimate7	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab
Estimate8	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab
Estimate9	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab
Estimate10	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab
Estimate11	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab
Estimate12	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab
Estimate13	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab
Estimate14	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab
Estimate15	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab
Estimate16	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab
Estimate17	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab
Estimate18	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab
Estimate19	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab
Estimate20	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab
Estimate21	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab
Estimate22	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab

January-24	\$ -
February-24	\$ -
March-24	\$ -
April-24	\$ -
May-24	\$ 1,100.00
June-24	\$ 1,200.00
July-24	\$ -
August-24	\$ -
September-24	\$ -
October-24	\$ -
November-24	\$ -
December-24	\$ -



2 - ESTIMATE SUMMARY INPUTS



ESTIMATE LIST Stone

Choose Your Currency	USD
% Profit Margin Goal	15.00%
Business Name	Stone & Grain

Tab Estimate Name Estimate Actual Sale Price De

- SELECT YOUR CURRENCY. THIS SETS THE CURRENCY SELECTION FOR ALL TABS
- SET YOUR % PROFIT GOAL ACROSS ALL ESTIMATES. (YOU CAN CHANGE THIS AT ANY TIME)
- ADD YOUR BUSINESS NAME! THIS WILL POPULATE YOUR BUSINESS NAME THROUGHOUT THE WORKBOOK

Estimate Name	Estimate	Actual Sale Price	Delivery Date
Entertainment Center	\$ 1,462.61	\$ 1,100.00	5/10/24
Granite Table	\$ 1,137.16	\$ 1,200.00	6/15/24
Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab
Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab
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Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab
Add Estimate Tab	Add Estimate Tab	Add Estimate Tab	Add Estimate Tab

WHEN YOU'RE READY TO CREATE AN ESTIMATE, START BY ADDING IN THE ESTIMATE NAME.

****EACH ESTIMATE NAME CORRESPONDS TO A SPECIFIC 'ESTIMATE TAB'. IF THE TAB DOESN'T EXIST, YOU'LL HAVE TO CREATE IT. THIS IS EXTREMELY EASY, AND COVERED LATER IN THE GUIDE.**

****THE REMAINDER OF THE TABLE WILL POPULATE AUTOMATICALLY ONCE YOU COMPLETE THE OTHER TABS.**



3 - SUPPLIER LIST



THE ONLY **REQUIRED** PART OF THE SUPPLIER LIST IS THE NAME OF THE VENDORS & SUPPLIERS YOU PLAN TO USE.

- YOU CAN LIST UP TO 30
- THIS LIST TURNS INTO A DROP DOWN SELECTION WITHIN THE ESTIMATE TABS, AND MATERIALS SUMMARY TAB.

BUSINESS VENDOR & SUPPLIER LIST

This list becomes a drop down selection within the product list.

COMPANY NAME	ADDRESS	PROFESSION / SUPPLIER TYPE	PHONE
Jefferson's Lumber			
Lowe's			
Granite Shop			

ESTIMATE NAME

PRODUCT PRICE	
Base Costs Price	\$
With Profit Margin	\$
Profit Goal %	
Estimated Annual Sales Units	

TIME & LABOR	
Hourly Labor Rate	\$
Hours Required	<input type="text" value="8.00"/>
Labor Total	\$

Supplier	Item
Jefferson's Lumber	Plywood - White
Lowe's	Stain
Lowe's	Polyeurethan



4 - MATERIAL SUMMARY TAB



DROP DOWN SELECTION MENU BASED ON YOUR VENDOR / SUPPLIER LIST

THE MATERIAL SUMMARY TAB IS USED TO SET UP A STANDARD LIST OF MATERIALS YOU WILL BE USING WITHIN YOUR ESTIMATES. THE LIST BECOMES A DROP DOWN MENU WITHIN THE ESTIMATE TABS. (SHOWN ON NEXT PAGE)

FOR EVERY MATERIAL, YOU'LL LIST:

- TYPE OF UNITS YOU BUY THE MATERIAL IN
- TYPICAL PURCHASE QUANTITY
- TOTAL COST

THEN THE TABLE PROVIDES A COST-PER-UNIT, WHICH AUTO PULLS INTO YOUR ESTIMATE TABS WHEN YOU SELECT A MATERIAL.

MATERIAL SUMMARY

Stone & Grain

USD

#	Vendor / Supplier	Material Inventory List	Units	Typical Receive Quantity	Cost	Cost Per Quantity
1	Jefferson's Lumber	Plywood - White Birch	Sheet	10	\$ 800.00	\$ 80.00
2	Lowe's	Stain	Can	1	\$ 22.00	\$ 22.00
3	Lowe's	Polyurethane	Can	1	\$ 35.00	\$ 35.00
4	Granite Shop	8x4 Granite Sheet	Slab	1	\$ 480.00	\$ 480.00
5	Jefferson's Lumber	2x4 spruce	Board	20	\$ 120.00	\$ 6.00
6					\$ -	
7					\$ -	
8					\$ -	
9					\$ -	
10					\$ -	
11					\$ -	
12					\$ -	
13					\$ -	
14					\$ -	





MATERIAL SUMMARY

Vendor / Supplier	Material Inventory List
Jefferson's Lumber	Plywood - White Birch
Lowe's	Stain
Lowe's	Polyeurethane
Granite Shop	8x4 Granite Sheet
Jefferson's Lumber	

YOUR MATERIAL LIST BECOMES A DROP DOWN MENU WITHIN THE ESTIMATE TABS. (SHOWN ON NEXT PAGE)

ESTIMATE NAME

Entertainme

PRODUCT PRICE		
Base Costs Price	\$	1,271.83
With Profit Margin	\$	1,462.61
Profit Goal %		15.0%
Estimated Annual Sales Units		45,422

TIME & LABOR		
Hourly Labor Rate	\$	50.00
Hours Required		8.00
Labor Total	\$	400.00

Item	
Materials	\$
Overhead	\$
Labor	\$
Total	\$
Profit %	\$
Product Price	\$

Actual Price	\$
Delivery Date (mm/dd/yyyy)	

Job Material Cost Breakdown				
Supplier	Item	Unit	Count	
Jefferson's Lumber	Plywood - White Birch	Sheet	8.00	\$
Lowe's	Stain	Can	3.00	\$
Lowe's	Polyeurethane	Can	3.00	\$



6 - OVERHEAD TAB

1.) LIST ANY VARIABLE OVERHEAD ITEMS THAT YOUR BUSINESS CARRIES

*THESE ITEMS ARE TURNED INTO A TOTAL ANNUALIZED COST, AND THEN ALLOCATED TO EACH JOB TO ENSURE YOU COVER YOUR TOTAL BUSINESS COSTS.

3.) ADD AN ESTIMATED JOB COUNT FOR THE YEAR.

FROM THIS, YOU'LL GET A 'PER JOB' ALLOCATION FOR YOUR TOTAL OVERHEAD COSTS

2.) FOR EACH OVERHEAD ITEM, INCLUDE:

- TOTAL TIMES YOU PAY FOR THAT OVERHEAD EACH YEAR.
- TOTAL COST EACH TIME YOU PAY.

BUSINESS OVERHEAD

Total Annual Estimated Jobs
Overhead Allocation Per Job

48

\$ 60.83

USD

BUSINESS OVERHEAD BREAKDOWN

Item	Paid "X" Times / Yr	Paid Amount	Annualized
Shop Electricity	12	\$ 85.00	\$ 1,020.00
Tools & Equipment	12	\$ 150.00	\$ 1,800.00
Business Licensing	2	\$ 50.00	\$ 100.00
		\$ -	\$ -
		\$ -	\$ -



7 - LABOR RATE TAB



1.) LIST ALL OF YOUR LABOR COSTS TO RUN YOUR BUSINESS.

*THE TABLE IS INTENDED TO BE SIMPLE, AND DOES NOT NEED TO BE A PERFECT ACCOUNT OF YOUR LABOR COSTS.

*THIS TABLE DETERMINES AN ADEQUATE LABOR RATE CHARGE TO COVER YOUR COSTS.

3.) ADD HOW MANY WORKING HOURS YOUR BUSINESS OPERATES EACH YEAR.

FROM THIS, YOU'LL GET A 'PER HOUR' LABOR RATE FOR YOUR BUSINESS.

2.) FOR EACH ROLE/JOB, INCLUDE:

- HEADCOUNT
- HOURLY RATE.
- AVERAGE WEEKLY HOURS WORKED.

HOURLY LABOR DETERMINATION

Annual Working Hours	2080
Hourly Labor Rate	\$ 50.00

USD

SHOP HOURLY RATE TABLE					
Role, Job	Headcount	Hourly Rate	Average Weekly Hours	Annualized	
Shop Manager	1	\$ 50.00	40.00	\$	104,000.00
		\$ -	0.00	\$	-
		\$ -	0.00	\$	-
		\$ -	0.00	\$	-
		\$ -	0.00	\$	-
		\$ -	0.00	\$	-
		\$ -	0.00	\$	-
		\$ -	0.00	\$	-
		\$ -	0.00	\$	-
		\$ -	0.00	\$	-
		\$ -	0.00	\$	-
		\$ -	0.00	\$	-

8 - ESTIMATE TABS



1.) START BY LISTING THE TOTAL ESTIMATED HOURS NEEDED TO COMPLETE THE JOB

NOTICE THAT THE ESTIMATE NAME AUTO-POPULATES IN THE HEADER

ESTIMATE NAME *Entertainment Center*

PRODUCT PRICE		
Base Costs Price	\$	1,271.83
With Profit Margin	\$	1,462.61
Profit Goal %		15.0%

TIME & LABOR		
Hourly Labor Rate	\$	50.00
Hours Required		8.00
Labor Total	\$	400.00

Item	Total
Materials	\$ 811.00
Overhead	\$ 60.83
Labor	\$ 400.00
Total	\$ 1,271.83
Profit %	\$ 190.78
Product Price	\$ 1,462.61

Actual Price	\$ 1,100.00
Delivery Date (mm/dd/yyyy)	5/10/24

USD
Entertainm
Center
Tab Nam
Estimate

Job Material Cost Breakdown						
Supplier	Item	Unit	Count	Unit Cost		Total Co
Jefferson's Lumber	Plywood - White Birch	Sheet	8.00	\$ 80.00		\$ 640.00



9 - ESTIMATE TABS



1.) BEGIN BUILDING YOUR MATERIAL LIST FOR YOUR ESTIMATE

2.) FOR EACH MATERIAL, NOTE HOW MANY WILL BE NEEDED. THE UNIT COST AND TOTAL COST WILL AUTO POPULATE.

Job Material Cost Breakdown						
Supplier	Item	Unit	Count	Unit Cost		Total Cost
Jefferson's Lumber	Plywood - White Birch	Sheet	8.00	\$ 80.00		\$ 640.00
Lowes	Stain	Can	3.00	\$ 22.00		\$ 66.00
Lowes	Polyurethane	Can	3.00	\$ 35.00		\$ 105.00



10 - ESTIMATE TABS - RESULTS



YOU'LL BE PROVIDED TWO PRICES.

- BASE COSTS = ALL COSTS COVERED.
- PROFIT PRICE = BASE COSTS + PROFIT MARGIN GOAL

THE ESTIMATE TAB WILL AUTO POPULATE TOTAL MATERIAL, OVERHEAD, LABOR, AND PROFIT MARGIN COSTS, PROVIDING YOU WITH THE BEST PRICE TO CHARGE.

ESTIMATE NAME *Entertainment Center*

PRODUCT PRICE		
Base Costs Price	\$	1,271.83
With Profit Margin	\$	1,462.61
Profit Goal %		15.0%

TIME & LABOR		
Hourly Labor Rate	\$	50.00
Hours Required		8.00
Labor Total	\$	400.00

Item	Total
Materials	\$ 811.00
Overhead	\$ 60.83
Labor	\$ 400.00
Total	\$ 1,271.83
Profit %	\$ 190.78
Product Price	\$ 1,462.61

Actual Price	\$ 1,100.00
Delivery Date (mm/dd/yyyy)	5/10/24

USD
Entertainment Center
Tab Name Estimate1

Job Material Cost Breakdown

Supplier	Item	Unit	Count	Unit Cost	Total Cost
Jefferson's Lumber	Plywood - White Birch	Sheet	8.00	\$ 80.00	\$ 640.00



11 - ESTIMATE TABS - ACTUAL PRICE



ONCE THE JOB IS COMPLETED, NOTE THE ACTUAL PRICE CHARGE, AND THE DATE THE JOB WAS COMPLETED.

THIS DATA ROLLS INTO YOUR JOB REVENUE DASHBOARD

ESTIMATE NAME

Entertainment Center

PRODUCT PRICE

Base Costs Price	\$	1,271.83
With Profit Margin	\$	1,462.61
Profit Goal %		15.0%

TIME & LABOR

Hourly Labor Rate	\$	50.00
Hours Required		8.00
Labor Total	\$	400.00

Item	Total
Materials	\$ 811.00
Overhead	\$ 60.83
Labor	\$ 400.00
Total	\$ 1,271.83
Profit %	\$ 190.78
Product Price	\$ 1,462.61

Actual Price	\$ 1,100.00
Delivery Date (mm/dd/yyyy)	5/10/24

USD
Entertainment Center
Tab Name Estimate1

Job Material Cost Breakdown

Supplier	Item	Unit	Count	Unit Cost	Total Cost
Jefferson's Lumber	Plwood - White Birch	Sheet	8.00	\$ 80.00	\$ 640.00



12 - CUSTOMER INVOICE

DSK

INVOICE

Entertainment Center

USD

Materials & Labor

\$	1,462.61
Discount	10.00%
\$	1,316.35

Estimate1

Entertainment Center

Item	Unit	Count
Plywood - White Birch	Sheet	8.00
Stain	Can	3.00
Polyurethane	Can	3.00

THE ESTIMATE TABS ARE FOR YOU. THIS IS THE TAB TO SHARE WITH YOUR CUSTOMER.

1.) SELECT THE ESTIMATE FROM THE DROP DOWN MENU

2.) IF A DISCOUNT IS OFFERED, NOTE IT IN THE DISCOUNT BOX.

THE REMAINDER OF THE INVOICE IS 100% AUTOMATIC!

Stone & Grain

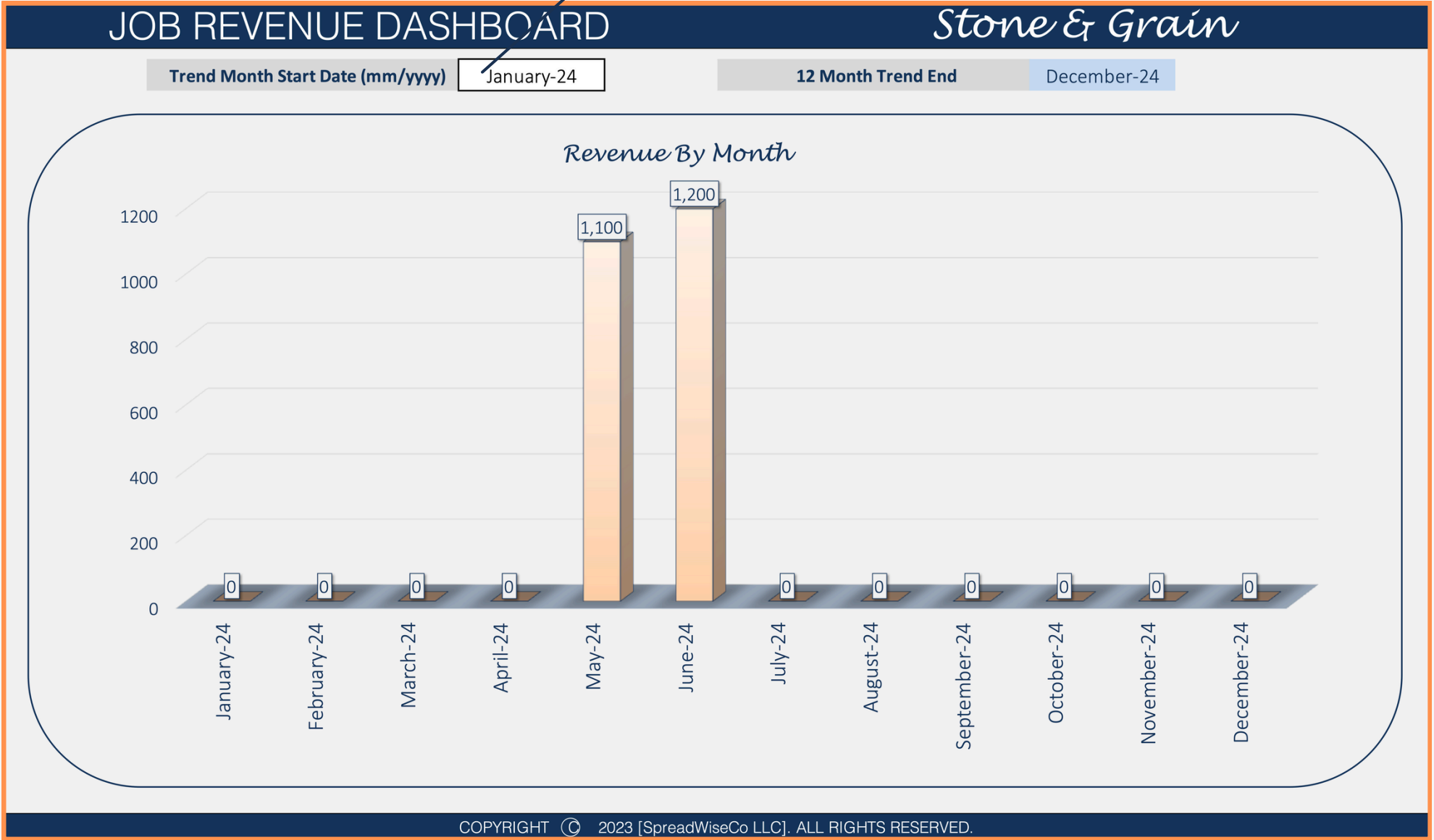
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13 - REVENUE DASHBOARD



YOUR DASHBOARD WILL PROVIDE A 12 MONTH TREND FOR YOUR TOTAL REVENUE BY MONTH. JUST SELECT A START DATE!



• Built With
Microsoft Excel

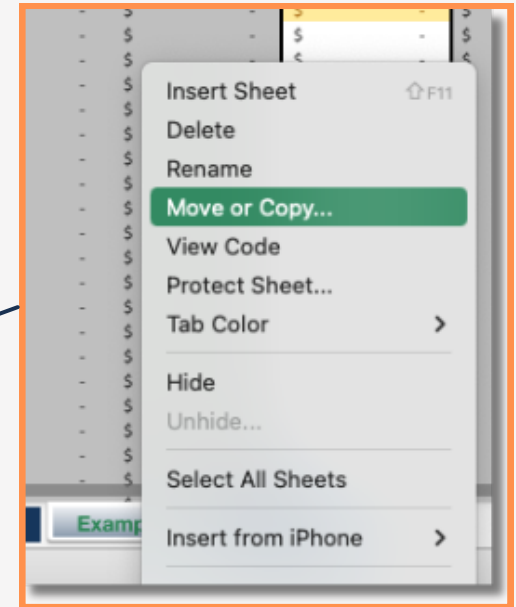
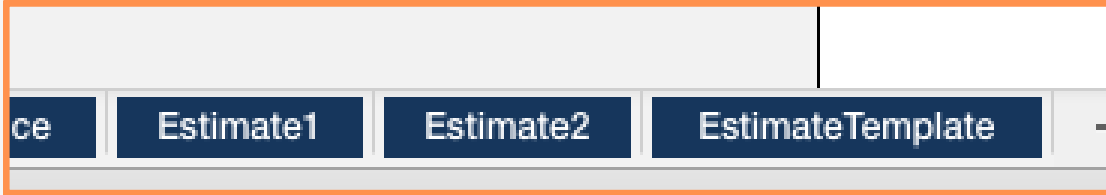
• NOT Optimized For Use
With **Google Sheets**

\$ USD, € EUR, £ GBP



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14 - ADDING ESTIMATE TABS



- RIGHT CLICK ON THE ESTIMATE TAB TEMPLATE, & MAKE A COPY...OR HOWEVER MANY COPIES YOU NEED.
- RIGHT CLICK TO CHANGE THE NAME OF THE TAB.

- SET THE TAB NAME TO MATCH THE NEXT SEQUENTIAL ESTIMATE TAB NUMBER FROM THE DASHBOARD EXACTLY.
- ONCE THE TAB IS ADDED AND RENAMED, IT WILL AUTO-LINK TO YOUR ESTIMATE LIST AND THE OTHER TABS

Estimate Tab	Estimate Name
Estimate1	Entertainment Center
Estimate2	Granite Table
Estimate3	
Estimate4	
Estimate5	
Estimate6	
Estimate7	
Estimate8	

IMPORTANT

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