REALTOR DASHBOARD GUIDE

4.2 - 4/19/24







GUIDE OVERVIEW

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!

USER INPUTS

INPUT BOX

DROP DOWN MENU

REVISION INFORMATION

Latest Realtor Dashboard Revision: 4.2

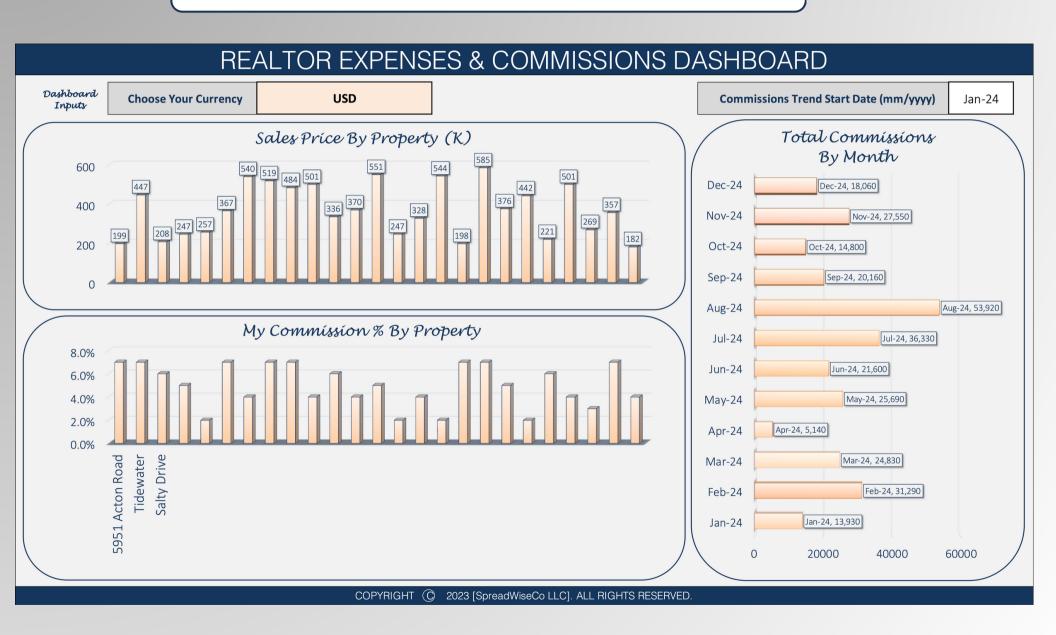
PASSWORD

- Tabs are locked to prevent accidental formula errors. Password: "swc"
- Use with discretion. Formulas and setups are extremely complex.

1 - GETTING STARTED



THIS JOURNEY BEGINS WITH THE DASHBOARD



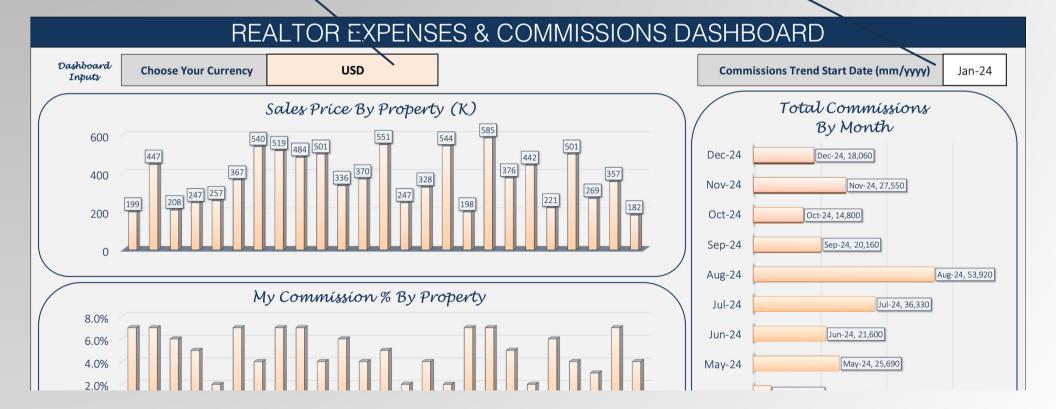
2 - DASHBOARD INPUTS



SELECT YOUR CURRENCY

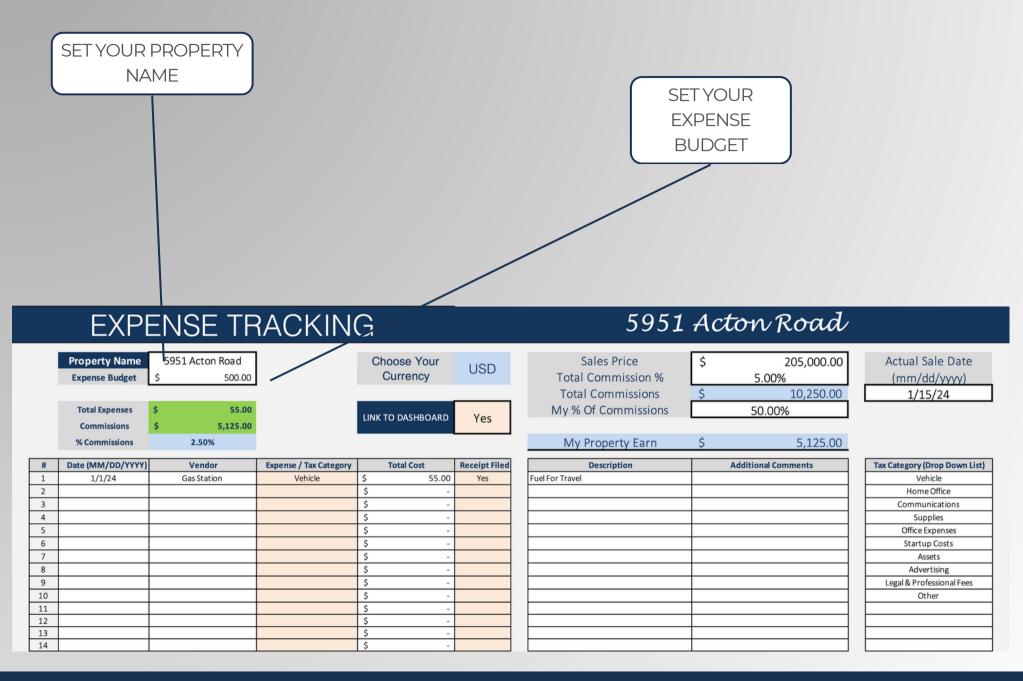
THIS WILL SET THE CURRENCY FOR THE ENTIRE WORKBOOK

SET YOUR STARTING MONTH FOR YOUR 12 MONTH COMMISSIONS TREND GRAPH



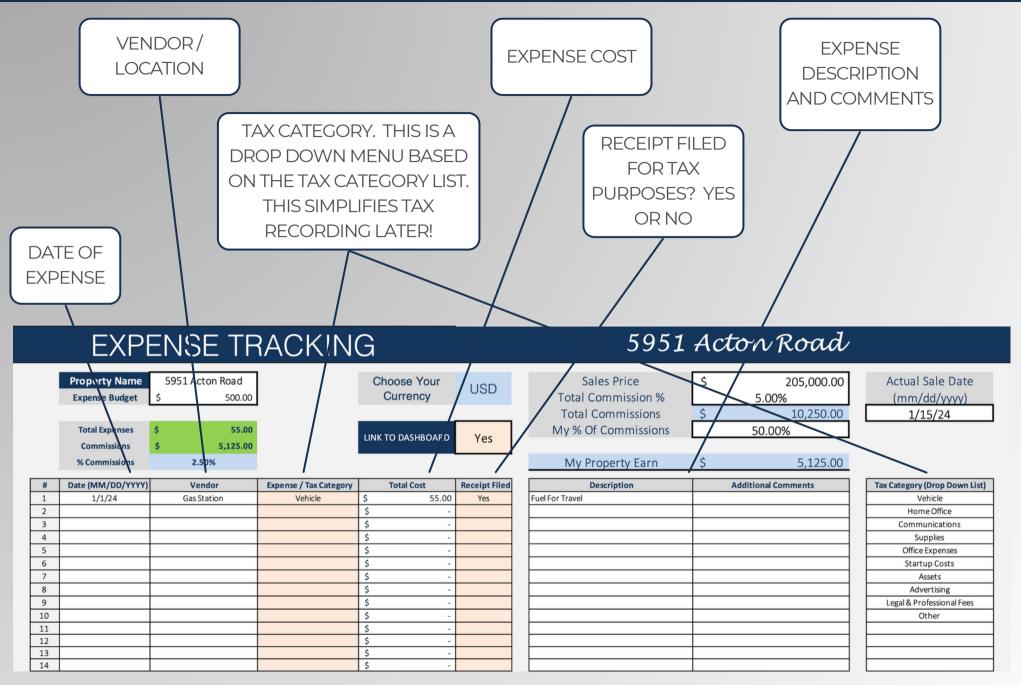
3 - EXPENSE TRACKING





4 - EXPENSE TRACKING





5 - COMMISSION TRACKING



TOTAL COMMISSIONS TO SALE PRICE WHAT % OF THE BE PAID BY SELLER **COMMISSIONS** WILL YOU GET? 5951 Acton Road Sales Price 205,000,00 Actual Sale Date **USD**

oose Your Currency

O DASHBOARD

Yes

otal Cost	Receipt Filed
55.00	Yes
-	
-	
-	
-	
-	
-	
-	
-	
-	
-	
-	
-	
-	

Total Commission % Total Commissions My % Of Commissions

5.00% 10,250.00 50.00%

5,125.00

My Property Earn

Description	Additional Comments
Fuel For Travel	

ACTUAL SALES DATE

(mm/dd/yyyy) 1/15/24

Tax Category (Drop Down List) 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 Acton Road Sales Price **Property Name** Choose Your USD Currency **Total Commiss Expense Budget** 500.00 **Total Commiss Total Expenses** 55.00 My % Of Comm LINK TO DASHBOARD Yes **Commissions** 5.125.00 % Commissions 2.50% My Property 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 Ś 16

7 - OFFER REVIEW AND ASSESSMENT

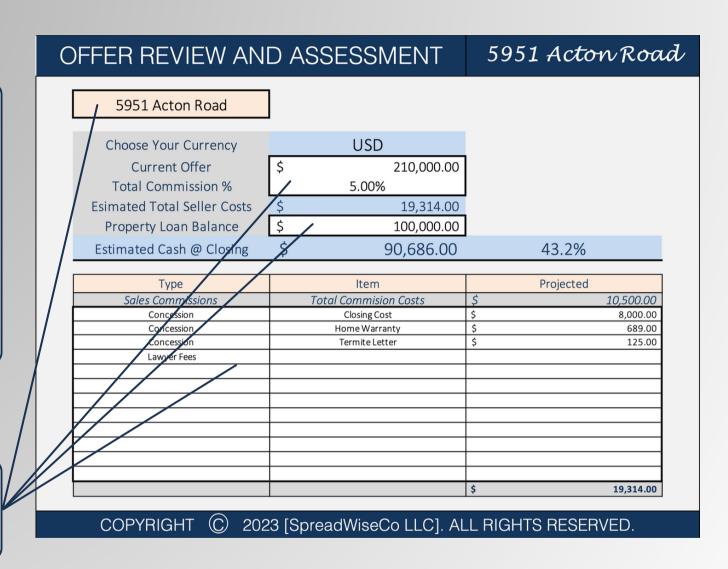


SELLER WANTS TO KNOW THEIR POSSIBLE CASH BEFORE LISTING?

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!



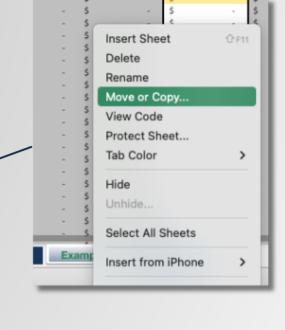
7 - ADDING PROPERTY TABS





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

- SET THE TAB NAME TO MATCH THE **NEXT PROPERTY TAB NUMBER** FROM THE DATA TABLE TAB EXACTLY.
- LINK THE TAB (IF NOT ALREADY), THEN YOU'RE DONE!



Property Tab Property1

Property2

Property3

Property4

Property5

IMPORTANT

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