

REALTOR DASHBOARD GUIDE

4.2 - 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.

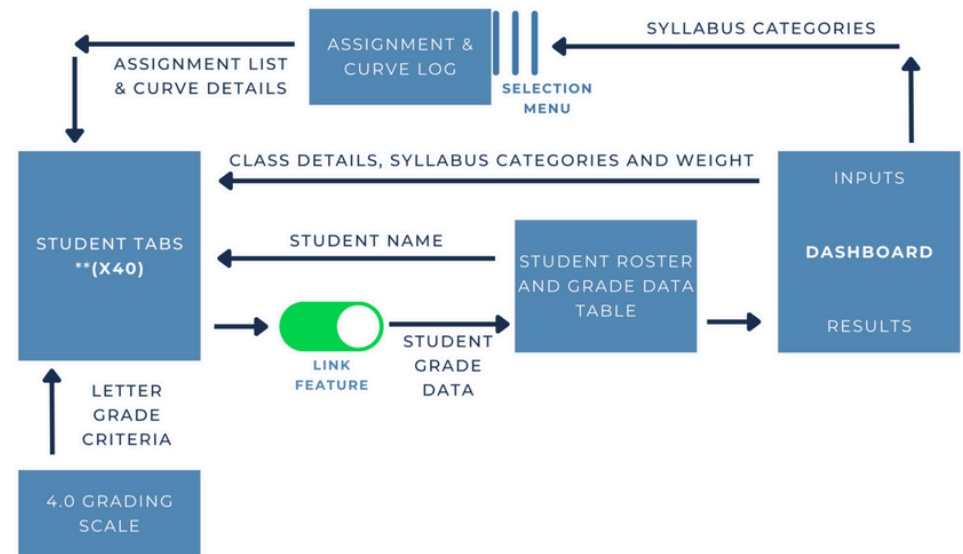
WE PROVIDE A HIGH LEVEL FLOW CHART FOR EVERY TOOL FOR A QUICK REFERENCE OF HOW IT ALL WORKS!

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

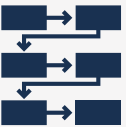


Not Compatible
with Google
Sheets

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
- Property Data Table
- Offer Review
- Property Tabs **** (x25)**

**Dashboard is preset with (3) property tabs. By simply making a copy of the tab, you can quickly link up to (25).

SETUP/LEARNING CURVE

15MIN

30MIN

45MIN

1HR

2HR

1 - GETTING STARTED



THIS JOURNEY BEGINS WITH THE DASHBOARD

REALTOR EXPENSES & COMMISSIONS DASHBOARD

Dashboard Inputs

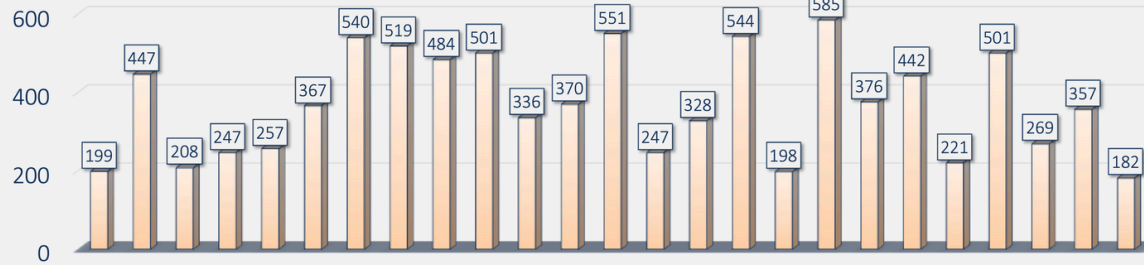
Choose Your Currency

USD

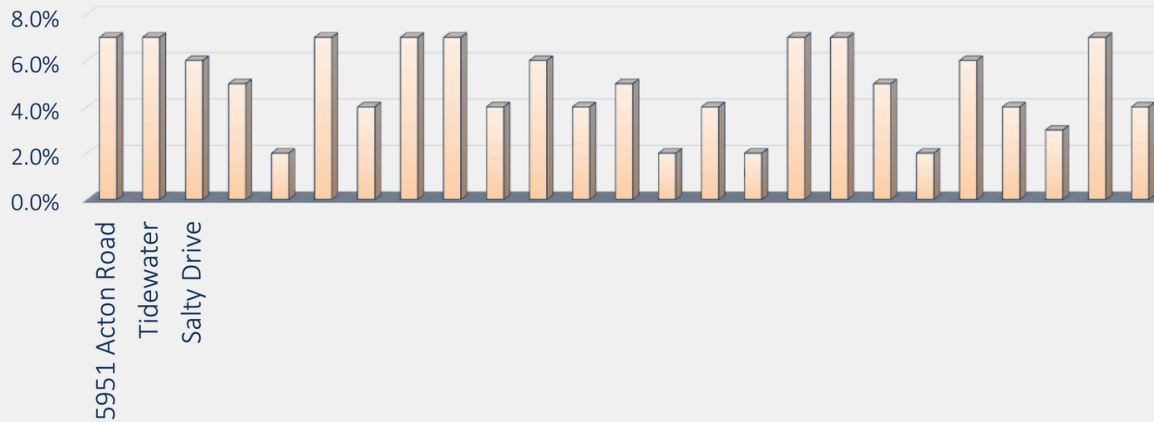
Commissions Trend Start Date (mm/yyyy)

Jan-24

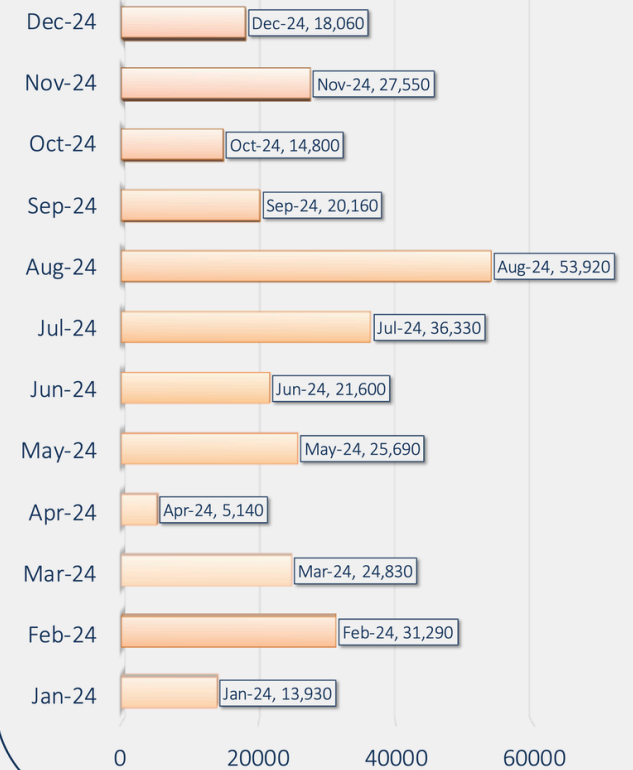
Sales Price By Property (K)



My Commission % By Property



Total Commissions By Month



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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

REALTOR EXPENSES & COMMISSIONS DASHBOARD

Dashboard Inputs

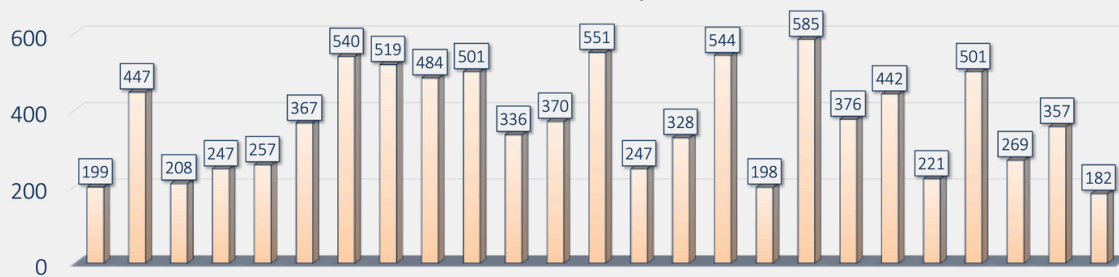
Choose Your Currency

USD

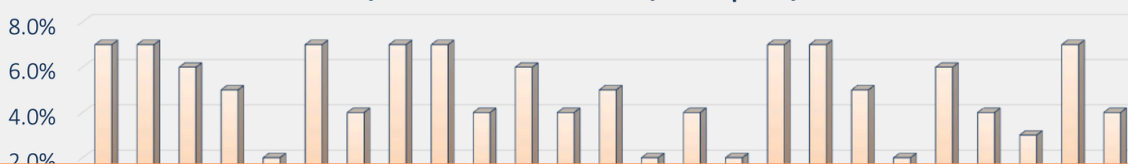
Commissions Trend Start Date (mm/yyyy)

Jan-24

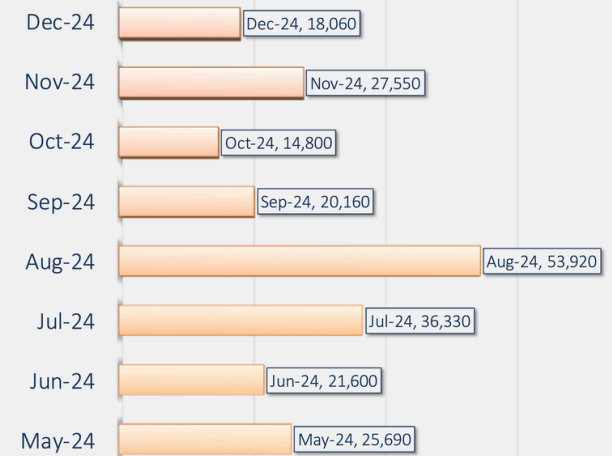
Sales Price By Property (K)



My Commission % By Property



Total Commissions By Month



3 - EXPENSE TRACKING



SET YOUR PROPERTY NAME

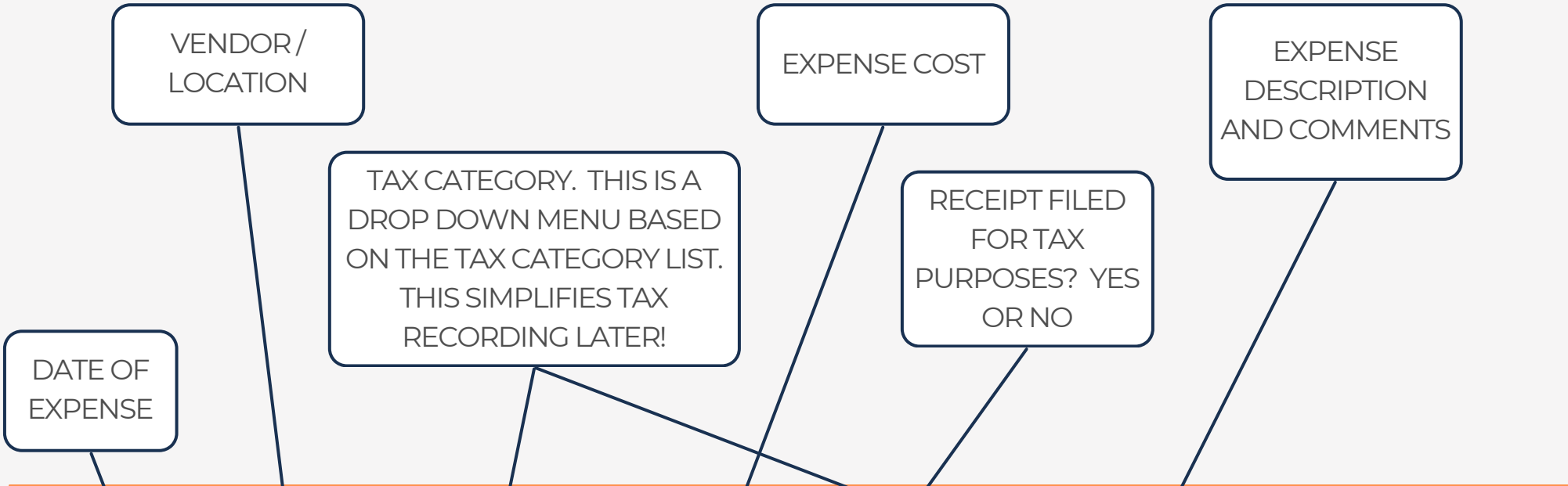
SET YOUR EXPENSE BUDGET

EXPENSE TRACKING
5951 Acton Road

Property Name	5951 Acton Road	Choose Your Currency	USD	Sales Price	\$ 205,000.00	Actual Sale Date (mm/dd/yyyy)	1/15/24
Expense Budget	\$ 500.00	LINK TO DASHBOARD	Yes	Total Commission %	5.00%		
Total Expenses	\$ 55.00			Total Commissions	\$ 10,250.00		
Commissions	\$ 5,125.00			My % Of Commissions	50.00%		
% Commissions	2.50%			My Property Earn	\$ 5,125.00		

#	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				\$ -				

4 - EXPENSE TRACKING



EXPENSE TRACKING
5951 Acton Road

Property Name	5951 Acton Road	Choose Your Currency	USD	Sales Price	\$ 205,000.00	Actual Sale Date (mm/dd/yyyy)	1/15/24
Expense Budget	\$ 500.00	LINK TO DASHBOARD	Yes	Total Commission %	5.00%		
Total Expenses	\$ 55.00			Total Commissions	\$ 10,250.00		
Commissions	\$ 5,125.00			My % Of Commissions	50.00%		
% Commissions	2.50%			My Property Earn	\$ 5,125.00		

#	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				\$ -				

6 - DASHBOARD LINK



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

EXPENSE TRACKING

Property Name: 5951 Acton Road
Expense Budget: \$ 500.00

Choose Your Currency: USD

Total Expenses: \$ 55.00
Commissions: \$ 5,125.00
% Commissions: 2.50%

LINK TO DASHBOARD: Yes

Sales Price
Total Commission
Total Commission
My % Of Commission

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				\$ -		
16				\$ -		

7 - OFFER REVIEW AND ASSESSMENT



SELLER WANTS TO KNOW THEIR POSSIBLE CASH BEFORE LISTING?

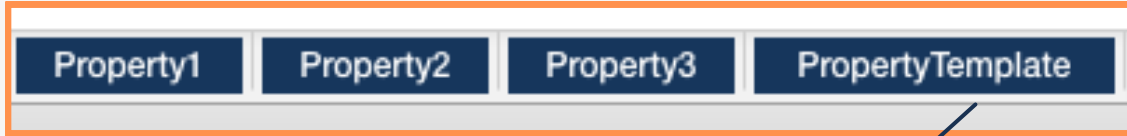
NEED TO REVIEW AN OFFER WITH THE SELLER?

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

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

OFFER REVIEW AND ASSESSMENT		5951 Acton Road	
5951 Acton Road			
Choose Your Currency	USD		
Current Offer	\$	210,000.00	
Total Commission %		5.00%	
Estimated Total Seller Costs	\$	19,314.00	
Property Loan Balance	\$	100,000.00	
Estimated Cash @ Closing	\$	90,686.00	43.2%
Type	Item	Projected	
<i>Sales Commissions</i>	<i>Total Commission Costs</i>	\$	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

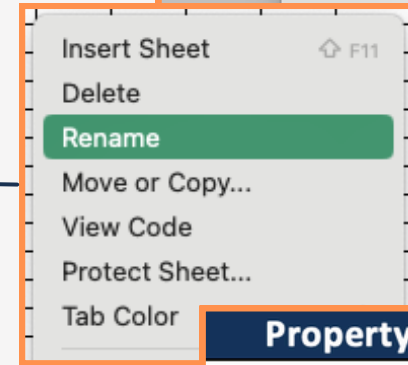
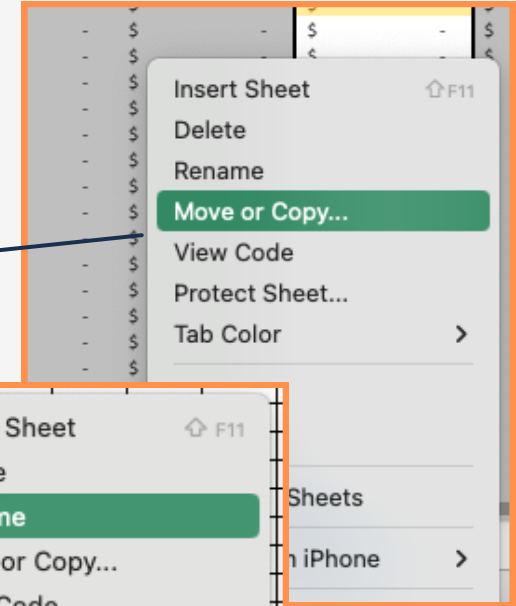


1.) RIGHT CLICK ON THE TEMPLATE & MAKE A COPY, OR HOWEVER MANY COPIES YOU NEED.

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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