REAL ESTATE DASHBOARD GUIDE

4.5 - 4/19/24





BUILT WITH MICROSOFT EXCEL

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



USER INPUTS

INPUT BOX

DROP DOWN MENU

REVISION INFORMATION

Latest Real Estate Dashboard Revision: 4.5

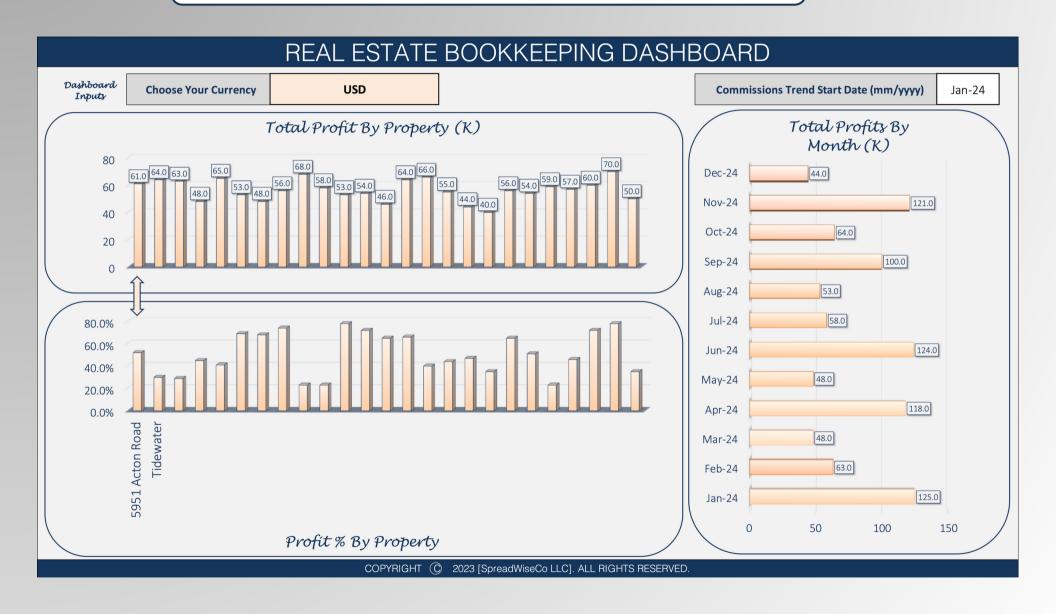
PASSWORD

- 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



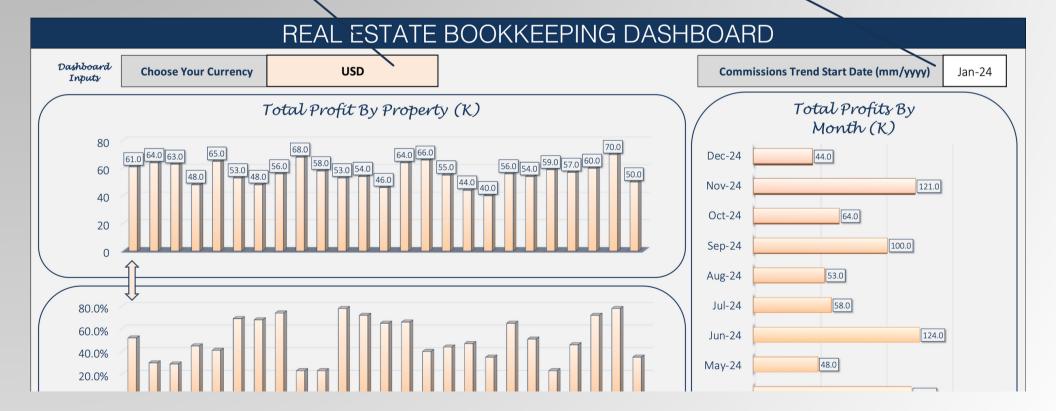
2 - DASHBOARD INPUTS



SELECT YOUR CURRENCY

THIS WILL SET THE CURRENCY FOR THE ENTIRE WORKBOOK

SET YOUR STARTING MONTH FOR YOUR 12 MONTH PROFITS TREND GRAPH



3 - SERVICE LIST

This list becomes a drop do



THE ONLY REQUIRED PART OF THE SERVICE LIST IS THE NAME OF THE SUB-CONTRACTORS & SUPPLIERS YOU PLAN TO USE.

• YOU CAN LIST UP TO 100.

COMPANY NAME

• THIS LIST TURNS INTO A DROP DOWN SELECTION WITHIN THE PROPERTY TABS.

5951 1 00.00 LINK TO DASHBOARD 00.00 0,750

SUB-CONTRACTOR &

		·
COMPANY NAME	ADDRESS	PROF
Hill Plambing	Address 1	
Easy Roofing	Address 2	
Jefferson Lumber	Address 3	

Date	BUILD / FLIP SPEND TRACKING						
10/15/23	Date			Paid			
10/18/23	10/1/23	Hill Plumbing		Full			
10/23/23 Hill Plumbing \$ 649.00 Full \$ \$ - \$ \$ \$ - \$ \$ \$ - \$ \$ - \$ \$ \$ - \$ \$ \$ - \$ \$ \$ - \$ \$ - \$ \$ \$ - \$ \$ - \$ \$ \$ - \$ - \$	10/15/23	Easy Roofing		Full			
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\$ - \$ - \$ 5	10/23/23	Hill Plumbing	\$ 649.00	Full			
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4 - PROPERTY TABS



1. SET YOUR PROPERTY NAME

2. ESTIMATE YOUR BUILD OR FLIP BUDGET

A. FOR YOUR FLIP BUDGET, DO NOT INCLUDE (ACQUISITION, COMMISSION,

CONCESSION) COSTS. THESE ARE ACCOUNTED FOR SEPARATELY.

3 SET YOUR TARGET SALE PRICE

A YOU CAN CHANGE THIS TO YOUR ACTUAL SALE PRICE LATER.

B.THIS VALUE IS USED TO CALCULATOR YOUR POTENTIAL PROFIT.

4. SET YOUR EXPECTED SELLER COMMISSION COSTS

A.THIS IS TYPICALLY 5%

5. SET THE PROPERTY SQUARE FEET

PROPERTY BUDGET & SPEND

Property Name	5951 A	cton Road
Build / Flip Budget	\$	52,000.00
Target / Actual Sale Price	\$	215,000
Seller Commission %		5.0%
Home Square Feet		1690
Total Profit	\$	47,600

Acquisition Cost	\$ 97,000
Build / Flip Spend	\$ 51,650
Seller Concessions	\$ 8,000
Commissions Cost	\$ 10,7
Price / Sq Ft	\$ 1

Profit % of Sale

BUDGET PROJECTED & ACTUAL SPEND

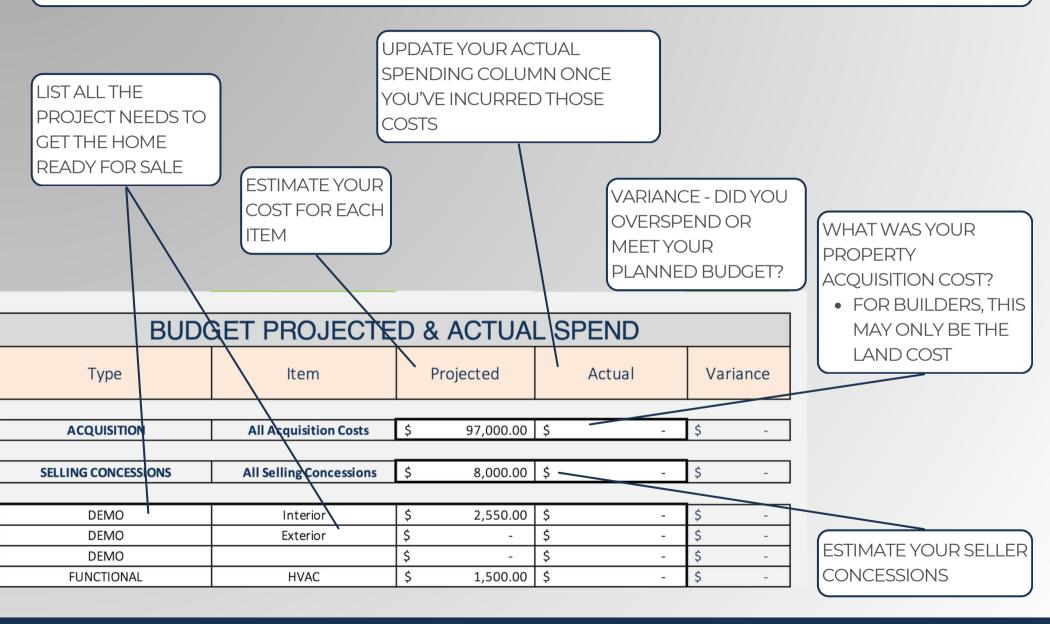


22.1%

5 - PROPERTY TABS - BUDGET DETAILS



*THIS IS DIFFERENT THAN THE SPEND TRACKING BY SUB-CONTRACTOR (NEXT PAGE). THIS IS AN ITEMIZED BUDGET LIST, VS A 'RECEIPT' LIST



6 - PROPERTY TABS - SPEND TRACKING



THIS IS A DETAILED SPENDING LIST AS YOU BUY MATERIALS AND PAY FOR SERVICES

SUB-CONTRACTOR OR SUPPLIER SELECTION

 THIS IS A DROP DOWN LIST BASED ON YOUR SUPPLIER LIST SERVICE NOW PAID IN FULL?

- WE KNOW SOME JOB PORTIONS MAY TAKE MULTIPLE WEEKS AND PAYMENTS
- NOTATE THIS AS
 MATERIALS, DRAW, OR
 FULL PAYOUT

AS YOU SPEND ON EACH
PROPERTY, THE TOTAL SPENT BY
SUB-CONTRACTOR / SUPPLIER
WILL UPDATE

DATE AMOUNT PAID / SPENT

COMMENT SECTION FOR DETAILS

BUILD / FLIP SPEND TRACKING BY SUB-CONTRACTOR / SUPPLIER

Date	Sub-Contractor / Supplier	Amount Paid / Spent	Paid In Full?	Comments	Spent To Date (By Supplier)
10/1/23	Hill Plumbing	\$ 3,500.00	Full Payout	Bathroom Re-Plumb	\$ 3,500.00
10/15/23	Easy Roofing	\$ 1,500.00	Full Payout	Shingle Damage	\$ 1,500.00
10/18/23	Jefferson Lumber	\$ 1,900.00	Full Payout	Framing Studs for new addition	\$ 1,900.00
10/23/23	Hill Plumbing	\$ 649.00	Full Payout	Sink Repair - main bath	\$ 4,149.00

7 - PROPERTY TABS - RESULTS SUMMARY



Actual Sale Date
mm/dd/yyyy

1/2/24

SET THE ACTUAL SALE DATE. THIS IS NEEDED FOR THE 12 MONTH PROFITS TREND

WHAT YOU ACTUALLY SPENT ON THE PROPERTY

THIS WILL BE BASED ON
THE LARGER VALUE
BETWEEN YOUR BUDGET
SPEND TABLE, AND
DETAILED SPEND
TRACKING TABLE

PROFIT = SALE PRICE - (ACQUISITION + SPEND + CONCESSIONS + COMMISSIONS)

PROFIT % = PROFIT / SALE PRICE

PROPERTY BUDGET & SPEND

Property Name		5951 A	ton Road
Build / Flip Budget Target / Actual Sale Price Seller Commission % Home Square Feet	\$ \$		52,000.00 215,000 5.0% 690
Total Profit	\$		47,600

Acquisition Cost \$ 97,000.00

Build / Plip Spend \$ 51,650.00

Seller Concessions \$ 8,000.00

Commisions Cost \$ 10,750

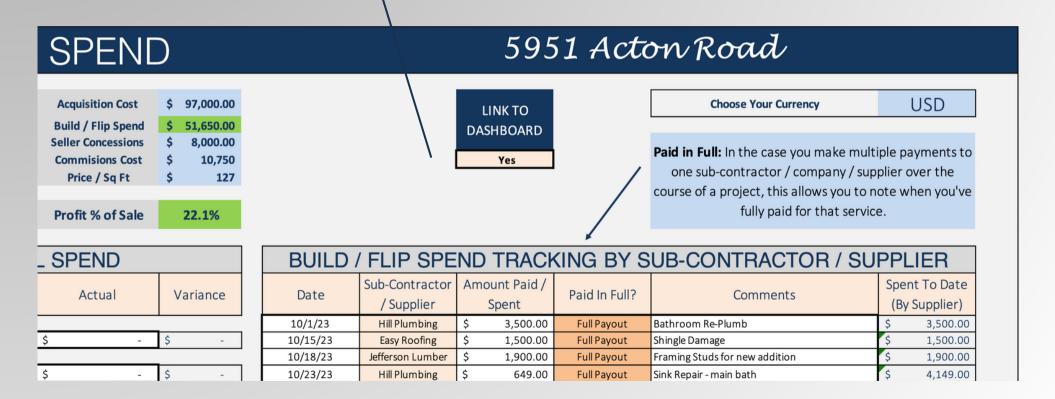
Price / Sq Ft \$ 127

Profit % of Sale 22.1%

8 - PROPERTY TAB - DASHBOARD LINK



THE DASHBOARD LINK ALLOWS YOU QUICKLY DISCONNECT/CONNECT A PROPERTY TAB FROM YOUR DASHBOARD DATA AND PERFORMANCE, WHILE KEEPING ALL HISTORY!





9 - ROI ASSESSMENT TAB



THIS TAB SET UP IS VERY SIMILAR TO THE BUDGET TABLE WITHIN FACH PROPERTY TAB.

HOWEVER, IT ALLOWS YOU TO DO A QUICK ASSESSMENT ON ROI **BEFORE YOU AQUIRE A** PROPERTY AND CREATE A NEW PROPERTY TAB.

FRONT END ROI ASSESSMENT

Choose Your Currency	USD	
Profit % Goal	20.0%	
Estimated Resale Value	\$ 180,000.00	
Esimated Total Costs	\$ 160,650.00	
Estimated Total Profit	\$ 19,350.00	10.8%

	PROJECTED COSTS	
Туре	ltem	Projected
Transactional	Acquisition	\$ 97,000.00
Transactional	Sales Commissions	\$ 8,000.00
Transactional	Concessions	\$ 4,000.00
TRANSACTIONAL	Building Permits	\$ -
DEMO	Interior	\$ 2,550.00
DEMO	Exterior	\$ -
DEMO		\$ -
FUNCTIONAL	HVAC	\$ 1,500.00
FUNCTIONAL	Roof	\$ 6,000.00
FUNCTIONAL	Insulation	\$ 1,200.00
FUNCTIONAL	framing	\$ 1,500.00
FUNCTIONAL	sheetrock work	\$ 1,000.00
FUNCTIONAL	trim	\$ 3,000.00

8 - OFFER REVIEW AND ASSESSMENT



ONCE YOU HAVE YOUR HOUSE ON THE MARKET, USE THIS TAB TO EVALUATE EACH OFFER YOU RECEIVE.

IN THE EVENT YOU ARE A
REALTOR, WE ALLOW TO EASILY
CAPTURE YOUR % OF THE SALES
COMMISSIONS

IF THERE'S A SPLIT IN THE PROFITS, YOU CAN EASILY NOTE YOUR PERCENTAGE, AND SEE YOUR PERSONAL PROFIT PORTION!

FFER REVIEW 8	& AS	SESSMENT	South Court
Select Property		Property3	
Choose Your Currency		USD	
Current Offer	\$	215,000.00	
Total Commission %		5.00%	
Esimated Total Costs	\$	163,500.00	
Estimated Total Profit	\$	51,500.00	24.0%
	$\overline{}$	·	
My % Of Commissions		35.00%	\$ 1,400.00
My % Of Sales Profit		50.00%	\$ 25,750.00
My Net Earn	\$	27,150.00	12.6%
Туре		ltem	Projected
Build / Flip Cost		Total Build / Flip Spend	\$ 51,650.00
Acquisition Cost		Acquisition Cost	\$ 97,000.00
Concessions		Closing	\$ 4,000.00
Concessions		Termite	\$ 100.00
Concessions			\$ -
Paid Commissions		Paid Commisssions	\$ 10,750.00
			\$ 163,500.00

9 - 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 EXACTLY.
- LINK THE TAB (IF NOT ALREADY), THEN YOU'RE DONE.

Property Tab
Property1
Property2
Property3
Property4
Property5

View Code
Protect Sheet...

Tab Color

Hide
Unhide...

Select All Sheets

Insert from iPhone

Insert Sheet Delete Rename

Move or Copy...

LINK TO DASHBOARD Yes

5951 Ac

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