



SpreadWiseCo™

Spreadsheets Reimagined

JOB ESTIMATE & REVENUE GUIDE

5.3 - 12/20/2024

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!

**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.

OUR COLOR PALLET LEGEND

*KEY OUTPUTS
HIGHLIGHTED

USER FIELDS

USER FIELDS,
AUTOMATED MENUS

*THE CELLS THAT DO
THE WORK

FOCUS OF THE FILE
AND THE TABS

CHARTS: THE
DASHBOARD STORY

*ADDITIONAL COLORS MAY BE USED WHERE NEEDED

IN YOUR PRODUCT 'ABOUT' TAB

DSK

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

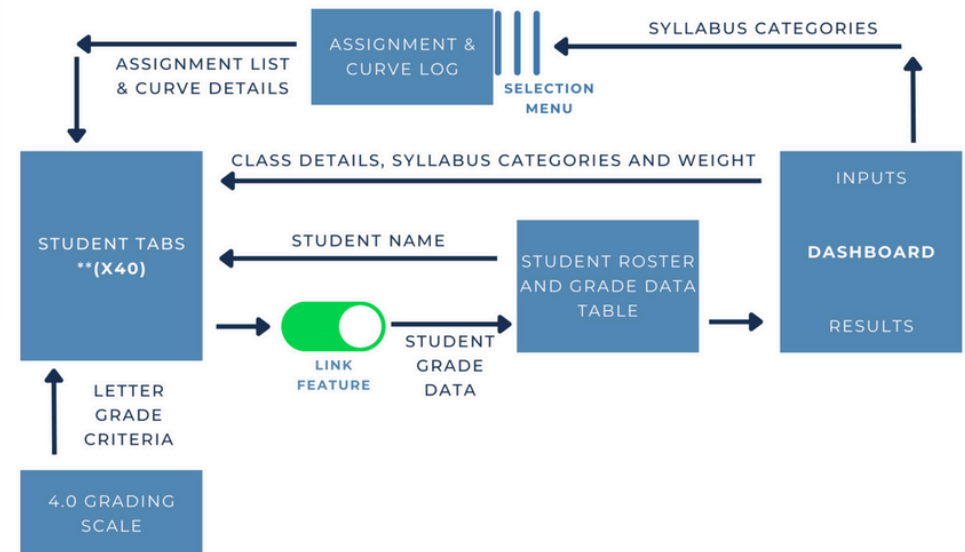
WE PROVIDE A HIGH LEVEL FLOW CHART FOR EVERY TOOL FOR A QUICK REFERENCE OF HOW IT ALL WORKS!

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)

PRODUCT FEATURES & LEARNING TIME

PRODUCT FEATURES

- ✓ CUSTOMIZABLE **SUPPLIER LIST**
(30 SUPPLIERS)
- ✓ CUSTOMIZABLE **MATERIAL LIST**
(150 MATERIALS)
- ✓ DETERMINE YOUR **HOURLY LABOR RATE**
- ✓ ACCOUNT FOR ALL **BUSINESS OVERHEAD COSTS**
- ✓ AUTOMATED **CUSTOMER ESTIMATES & INVOICES** (READY TO PRINT OR EMAIL)
- ✓ ESTIMATE AND **CUSTOMER RECORD KEEPING**
- ✓ AUTOMATED **JOB CALENDAR** (READY TO PRINT)
- ✓ UP TO **100 JOBS**
- ✓ **4 JOB STATUSES:** ESTIMATE, SCHEDULED, INVOICED, COMPLETE
- ✓ JOB STATUS **VISUAL CUES & TRACKING**
- ✓ 12 MONTH **PERFORMANCE TRENDS**
- ✓ **PROFIT AND REVENUE** INSIGHT TO **GROW YOUR BUSINESS**
- ✓ FIVE INTEGRATED **CURRENCIES** (USD, EUR, GBP, CAD, AUD)
- ✓ BUILT IN **GUIDE NOTES**



LEARNING & SETUP TIME

THIS IS OUR BEST ESTIMATE OF HOW MUCH TIME IT WILL TAKE THE AVERAGE PERSON TO LEARN AND COMPLETE THE INITIAL SETUP OF THEIR DASHBOARD

15MIN

30MIN

45MIN

1HR

1.5HR

2HR

TABS, GUIDES, COMPATABILITY

TABS & GUIDES

- ✓ SUPPLIER LIST
- ✓ BUSINESS OVERHEAD
- ✓ AUTOMATED ESTIMATE & INVOICE
- ✓ PDF GUIDE
- ✓ MATERIAL LIST
- ✓ JOB & CUSTOMER LIST SUMMARY
- ✓ AUTOMATED CALENDAR
- ✓ TOOL FLOW CHART
- ✓ HOURLY LABOR RATE
- ✓ JOB TABS (*X2)
- ✓ PERFORMANCE DASHBOARD

***Includes (2) job tabs. By simply making a copy of the tab, you can add up to (100).*

LEARN MORE



ETSY LIMITS PRODUCT PHOTOS. LEARN MORE ABOUT THESE ITEMS & FEATURES @ [HTTPS://SPREADWISECO.COM](https://spreadwise.co)

COMPATABILITY

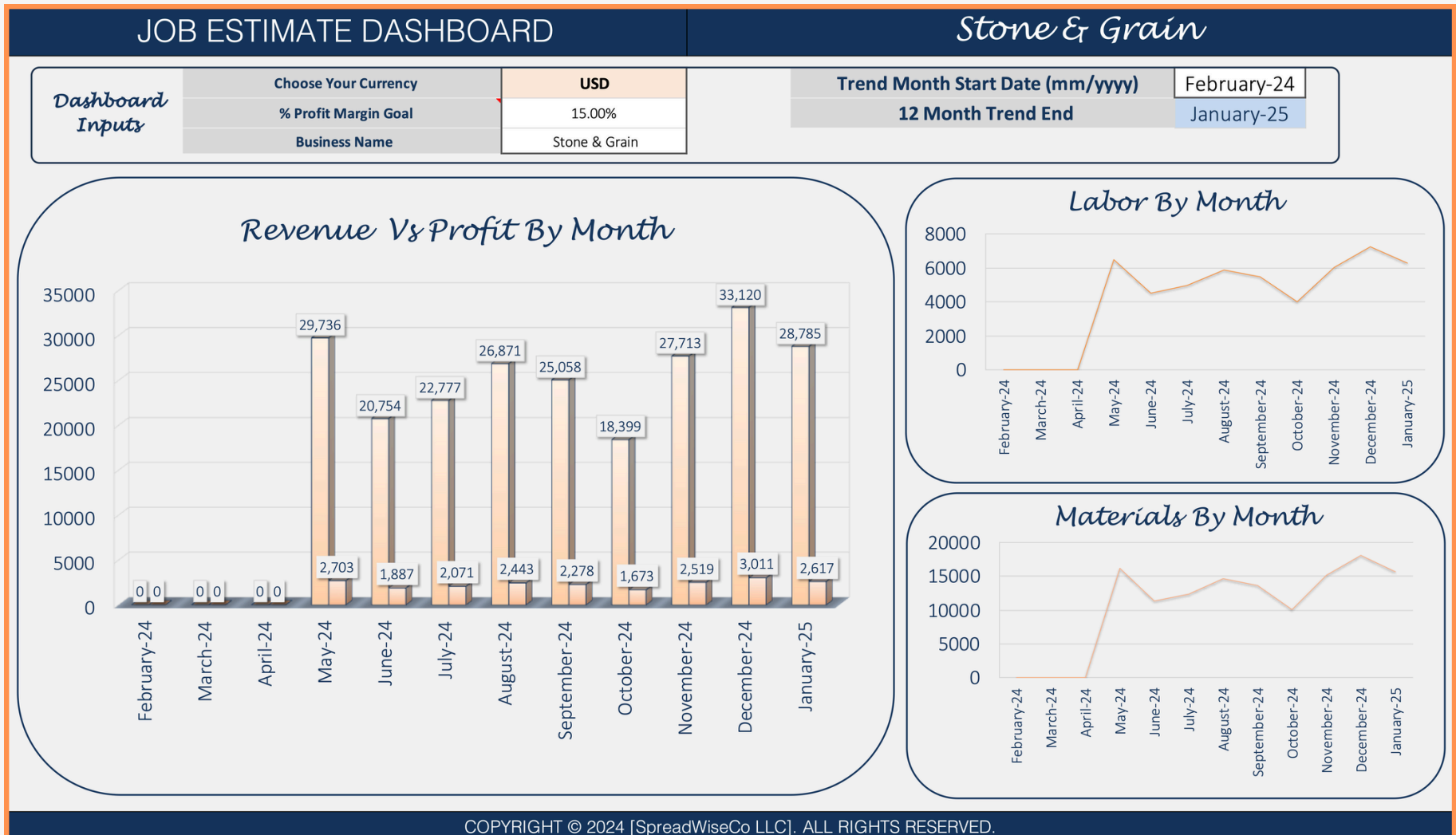
- ✓ BUILT WITH EXCEL 365 FOR MAC
- ✓ 2016 OR NEWER VERSIONS OF EXCEL
- ✓ EXCEL VERSIONS OLDER THAN 2016'
- ✓ MOBILE VERSIONS OF EXCEL
- ✗ GOOGLE SHEETS

Enjoy Your Dashboard!

1 - GETTING STARTED

DSK

THIS JOURNEY BEGINS WITH THE DASHBOARD



2 - DASHBOARD SETUP INPUTS

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



3 - SUPPLIER LIST

DSK

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 JOB TABS, AND MATERIALS SUMMARY TAB.

BUSINESS VENDOR & SUPPLIER LIST

COMPANY NAME

This list becomes a drop down selection within the job

COMPANY NAME

ADDRESS

PROFESSION / SUPPLIER TYPE

PRIM

Jefferson's Lumber
Lowe's
Granite Shop

JOB NAME

Job Status

COMPLETE

Customer Name

Sean

Customer Address

South Caro

Job Price Summary

Base Costs Price

\$

1,

With Profit Margin

\$

1,

Profit Goal %

Time & Labor

Hourly Labor Rate

\$

Hours Required

8.00

Labor Total

\$

Material Markup %

15.0%

Job

Supplier

Item

Jefferson's Lumber

Plywood - White Birch

Lowe's

Stain

Lowe's

Polyurethane

4 - MATERIAL SUMMARY TAB

DSK

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 JOBS. THE
LIST BECOMES A DROP DOWN
MENU WITHIN THE JOB 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 JOB 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					\$ -	

MATERIAL SUMMARY

YOUR MATERIAL LIST BECOMES A DROP DOWN MENU WITHIN THE JOB TABS.

Vendor / Supplier	Material Inventory List	
Jefferson's Lumber	Plywood - White Birch	
Lowes		
Lowes		
Granite Shop		
Jefferson's Lumber		

Customer Name	Sean	Customer Phone	803-455-4521
Customer Address	South Carolina	Customer Email Address	seanb@spreadwiseco.com

Job Price Summary		
Base Costs Price	\$	1,352.93
With Profit Margin	\$	1,543.71
Profit Goal %		15.0%

Time & Labor		
Hourly Labor Rate	\$	50.00
Hours Required		8.00
Labor Total	\$	400.00
Material Markup %		15.0%

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

Item	Total	
Materials	\$ 811.00	USD
Material Tax Rate	10.0%	
Material Tax	\$ 81.10	
Material Mark Up	\$ 121.65	
Overhead	\$ 60.83	
Labor	\$ 400.00	
Profit %	\$ 69.13	
Job Price	\$ 1,543.71	

Target Due Date (mm/dd/yyyy)	5/10/24
Actual Price Customer Charged	\$ 1,540.00
Job Complete (mm/dd/yyyy)	5/12/24

6 - OVERHEAD TAB

DSK

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

48

Overhead Allocation Per Job

\$ 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

DSK

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	\$ -
		\$ -	0.00	\$ -
		\$ -	0.00	\$ -
		\$ -	0.00	\$ -

8 - JOB TABS

DSK

2) SET THE JOB STATUS (THIS WILL GENERALLY BE "ESTIMATE" WHEN CREATING A NEW JOB)

- ESTIMATE = PROVIDING A CUSTOMER ESTIMATE
- SCHEDULE = WORK HAS BEEN SCHEDULED
- INVOICED = WORK IS COMPLETE AND CUSTOMER HAS BEEN INVOICED
- COMPLETE = JOB HAS BEEN PAID IN FULL

1.) SET THE JOB NAME

JOB NAME

Large Granite Table

Job Status	COMPLETE	Job Name	Large Granite Table
Customer Name	Sean	Customer Phone	803-455-4521
Customer Address	South Carolina	Customer Email Address	seanb@spreadwiseco.com
Job Price Summary			
Base Costs Price	\$ 1,352.93		
With Profit Margin	\$ 1,543.71		
Profit Goal %	15.0%		
Time & Labor			
Hourly Labor Rate	\$ 50.00		
Hours Required	8.00		
Labor Total	\$ 400.00		
Material Markup %	15.0%		
		Item	Total
		Materials	\$ 811.00
		Material Tax Rate	10.0%
		Material Tax	\$ 81.10
		Material Mark Up	\$ 121.65
		Overhead	\$ 60.83
		Labor	\$ 400.00
		Profit %	\$ 69.13
		Job Price	\$ 1,543.71
		Target Due Date (mm/dd/yyyy)	5/10/24
		Actual Price Customer Charged	\$ 1,540.00
		Job Complete (mm/dd/yyyy)	5/12/24

9 - JOB TABS (CONTINUED)

DSK

3) FILL OUT THE CUSTOMER INFORMATION

JOB NAME

Large Granite Table

Job Status

COMPLETE

Job Name

Large Granite Table

Customer Name

Sean

Customer Phone

803-455-4521

Customer Address

South Carolina

Customer Email Address

seanb@spreadwiseco.com

Job Price Summary

Base Costs Price	\$	1,352.93
With Profit Margin	\$	1,543.71
Profit Goal %		15.0%

Time & Labor

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

Material Markup % 15.0%

Item

Total

Materials	\$	811.00
Material Tax Rate		10.0%
Material Tax	\$	81.10
Material Mark Up	\$	121.65
Overhead	\$	60.83
Labor	\$	400.00
Profit %	\$	69.13
Job Price	\$	1,543.71

USD

Target Due Date (mm/dd/yyyy) 5/10/24

Actual Price Customer Charged \$ 1,540.00

Job Complete (mm/dd/yyyy) 5/12/24

10 - JOB TABS (CONTINUED)

DSK

4.) LIST THE TOTAL ESTIMATED HOURS NEEDED TO COMPLETE THE JOB

5.) ADD IN YOUR MATERIAL MARKUP & MATERIAL TAX RATE

JOB NAME

Large Granite Table

Job Status

COMPLETE

Job Name

Large Granite Table

Customer Name

Sean

Customer Phone

803-455-4521

Customer Address

South Carolina

Customer Email Address

seanb@spreadwiseco.com

Job Price Summary

Base Costs Price	\$	1,352.93
With Profit Margin	\$	1,543.71
Profit Goal %		15.0%

Time & Labor

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

Material Markup % 15.0%

Item

Total

Materials	\$	811.00
Material Tax Rate		10.0%
Material Tax	\$	81.10
Material Mark Up	\$	121.65
Overhead	\$	60.83
Labor	\$	400.00
Profit %	\$	69.13
Job Price	\$	1,543.71

USD

Target Due Date (mm/dd/yyyy) 5/10/24

Actual Price Customer Charged \$ 1,540.00

Job Complete (mm/dd/yyyy) 5/12/24



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

[illegible]

12 - JOB TABS (CONTINUED)

DSK

YOU'LL BE PROVIDED TWO PRICES.

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

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

JOB NAME		Large Granite Table	
Job Status	COMPLETE	Job Name	Large Granite Table
Customer Name	Sean	Customer Phone	803-455-4521
Customer Address	South Carolina	Customer Email Address	seanb@spreadwiseco.com
Job Price Summary		Item	
Base Costs Price	\$ 1,352.93	Total	
With Profit Margin	\$ 1,543.71	Materials	\$ 811.00
Profit Goal %	15.0%	Material Tax Rate	10.0%
		Material Tax	\$ 81.10
		Material Mark Up	\$ 121.65
		Overhead	\$ 60.83
		Labor	\$ 400.00
		Profit %	\$ 69.13
		Job Price	\$ 1,543.71
Time & Labor		Target Due Date (mm/dd/yyyy)	5/10/24
Hourly Labor Rate	\$ 50.00	Actual Price Customer Charged	\$ 1,540.00
Hours Required	8.00	Job Complete (mm/dd/yyyy)	5/12/24
Labor Total	\$ 400.00		
Material Markup %	15.0%		

13 - JOB TABS (CONTINUED)

DSK

8.) WHEN YOU'RE READY TO SCHEDULE THE JOB, ADD IN THE DUE DATE, AND UPDATE THE STATUS TO "SCHEDULED"

9.) WHEN THE JOB IS COMPLETE, ADD IN THE JOB COMPLETE DATE

10.) WHEN THE JOB IS COMPLETE, UPDATE ANY MATERIAL USAGE AND LABOR HOURS.

THIS ALLOWS YOU TO SEND AN ACCURATE AND FINAL INVOICE TO THE CUSTOMER.

Customer Email Address		seanb@spreadwiseco.com
Item	Total	
Materials	\$	811.00
Material Tax Rate		10.0%
Material Tax	\$	81.10
Material Mark Up	\$	121.65
Overhead	\$	60.83
Labor	\$	400.00
Profit %	\$	69.13
Job Price	\$	1,543.71
Target Due Date (mm/dd/yyyy)		5/10/24
Actual Price Customer Charged	\$	1,540.00
Job Complete (mm/dd/yyyy)		5/12/24

14 - JOB TABS (CONTINUED)

DSK

11.) ONCE THE CUSTOMER HAS BEEN INVOICED, UPDATE THE ACTUAL PRICE THE CUSTOMER WAS CHARGED

- THE TARGET DUE DATE IS USED TO POPULATE THE JOB CALENDAR
- THE COMPLETE DATE AND THE ACTUAL CHARGE PRICE ARE USED TO POPULATE YOUR DASHBOARD WITH YOUR PROFIT & REVENUE BY MONTH

JOB NAME

Large Granite Table

Job Status	COMPLETE	Job Name	Large Granite Table
Customer Name	Sean	Customer Phone	803-455-4521
Customer Address	South Carolina	Customer Email Address	seanb@spreadwiseco.com

Job Price Summary	
Base Costs Price	\$ 1,352.93
With Profit Margin	\$ 1,543.71
Profit Goal %	15.0%

Time & Labor	
Hourly Labor Rate	\$ 50.00
Hours Required	8.00
Labor Total	\$ 400.00
Material Markup %	15.0%

Item	Total
Materials	\$ 811.00
Material Tax Rate	10.0%
Material Tax	\$ 81.10
Material Mark Up	\$ 121.65
Overhead	\$ 60.83
Labor	\$ 400.00
Profit %	\$ 69.13
Job Price	\$ 1,543.71

Target Due Date (mm/dd/yyyy)	5/10/24
Actual Price Customer Charged	\$ 1,540.00
Job Complete (mm/dd/yyyy)	5/12/24



THE INVOICE TAB WILL EITHER SHOW AS “ESTIMATE” OR “INVOICE” BASED ON THE JOB STATUS

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

Stone & Grain

16 - JOB LIST & SUMMARY

DSK

THE JOB LIST HAS BUILT IN STATUS TRACKING, WITH VISUAL CUES TO QUICKLY SEE THE STATUS OF ANY JOB IN YOUR DASHBOARD

THE ENTIRE JOB LIST TABLE IS 100% AUTOMATIC. IT IS A QUICK REFERENCE FOR THINGS LIKE:

- JOB LOOKUP
- CUSTOMER LOOKUP
- JOB STATUS

JOB & CUSTOMER LIST SUMMARY

Stone & Grain

USD

ESTIMATE

GENERATING AN ESTIMATE FOR THE CUSTOMER INQUIRY

SCHEDULED

CUSTOMER HAS AGREED TO THE WORK, AND IT'S BEEN SCHEDULED

INVOICED

WORK HAS BEEN COMPLETED, AND FINAL INVOICE SENT TO CUSTOMER

COMPLETE

CUSTOMER HAS PAID IN FULL

JobTab	Job Name	Job Status	Customer Name	Customer Email	Base Cost Price	Actual Sale Price	Net Profit	Total Material	
J1	Large Granite Table	COMPLETE	Sean	seanb@spreadwiseco.com	\$ 1,352.93	\$ 1,540.00	\$ 187.07	\$ 811.00	\$
J2	Small Granite Table	SCHEDULED	Sean	seanb@spreadwiseco.com	\$ 1,352.93	Update Job Tab		\$ 811.00	\$
J3	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	A
J4	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	A
J5	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	A
J6	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	A
J7	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	A
J8	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	A
J9	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	A
J10	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	A
J11	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	A
J12	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	A
J13	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	A
J14	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	A
J15	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	A
J16	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	A
J17	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	A
J18	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	A
J19	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	A
J20	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	A
J21	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	A
J22	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	A

17 - REVENUE DASHBOARD

DSK

YOUR DASHBOARD WILL PROVIDE 12 MONTH TRENDS FOR YOUR BUSINESS PERFORMANCE BY MONTH. JUST SELECT A START DATE!

JOB ESTIMATE DASHBOARD

Stone & Grain

Dashboard
Inputs

Choose Your Currency

USD

% Profit Margin Goal

15.00%

Business Name

Stone & Grain

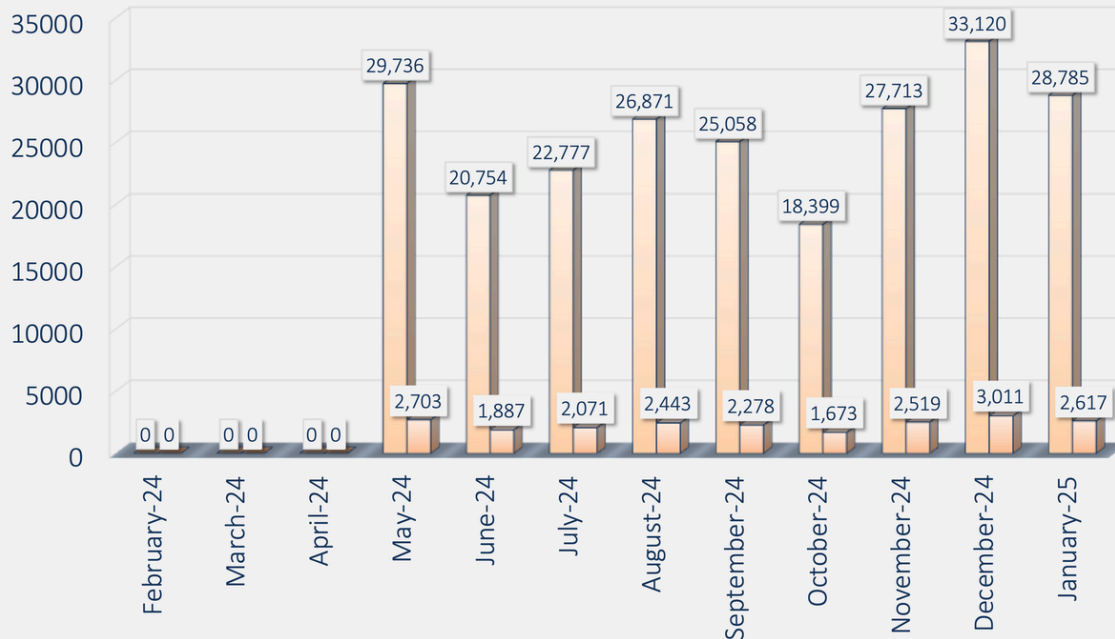
Trend Month Start Date (mm/yyyy)

February-24

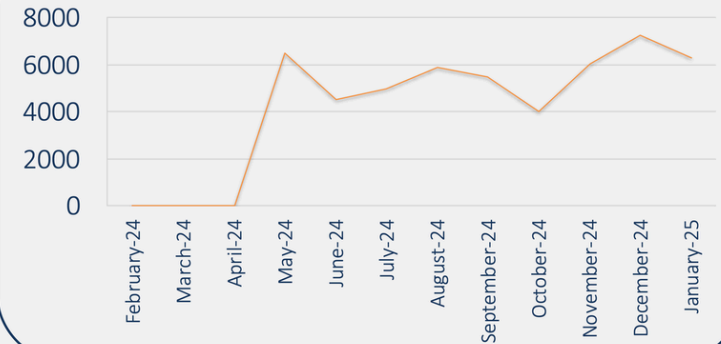
12 Month Trend End

January-25

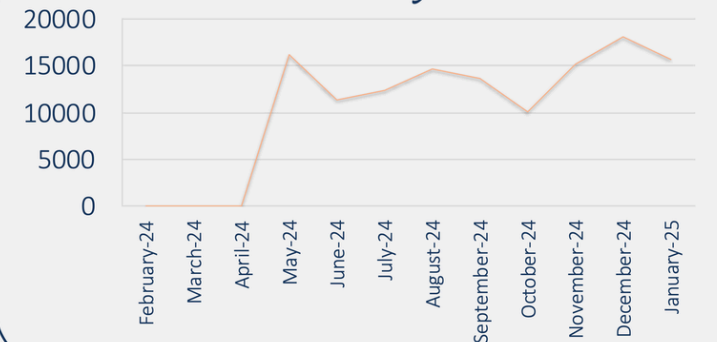
Revenue Vs Profit By Month



Labor By Month



Materials By Month



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18 - JOB CALENDAR



- SELECT THE CALENDAR MONTH AND YEAR, AND THE CALENDAR WILL TAKE CARE OF THE REST.
- PRINT FOR ON THE GO JOB PLANNING

THESE ARE THE UPCOMING JOBS FROM THE MONTH SELECTED, AND FORWARD

JOB CALENDAR

MAY 2024

CALENDAR YEAR

2024

CALENDAR MONTH

MAY

	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
				01	02	03	04
1							
2							
3							
	05	06	07	08	09	10	11
1						Sean	
2							
3							
	12	13	14	15	16	17	18
1							Sean
2							
3							
	19	20	21	22	23	24	25
1							
2							
3							
	26	27	28	29	30	31	
1							
2							
3							
1							
2							
3							

UPCOMING JOB DATES

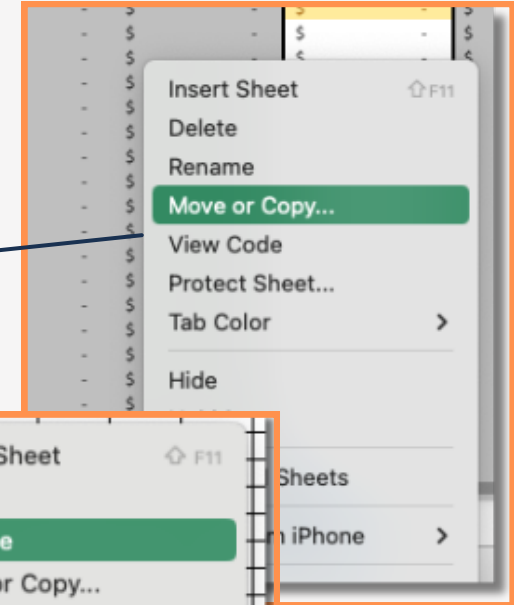
#	Date	Customer	Day
1	5/10/24	Sean	10
2	5/18/24	Sean	18
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
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19			
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21			
22			
23			
24			
25			

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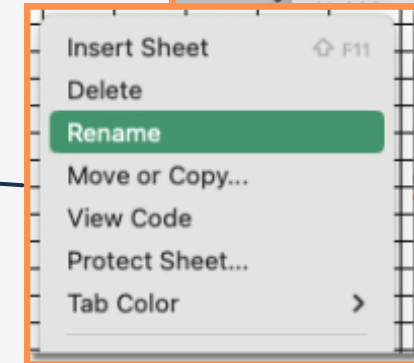
19 - ADDING JOB TABS



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 JOB TAB NUMBER FROM THE JOB SUMMARY TABLE EXACTLY.

- ONCE THE TAB IS ADDED AND RENAMED, IT WILL AUTO-LINK TO YOUR JOB LIST AND THE OTHER TABS

JobTab	Job Name
J1	Large Granite Table
J2	Small Granite Table
J3	Add Job Tab
J4	Add Job Tab
J5	Add Job Tab
J6	Add Job Tab
J7	Add Job Tab

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