

JOB ESTIMATE & REVENUE GUIDE

5.3 - 4/6/2025

BUILT WITH MICROSOFT EXCEL

PRODUCT FEATURES & LEARNING TIME

PRODUCT FEATURES

- CUSTOMIZABLE SUPPLIER LIST (30 SUPPLIERS)
- ESTIMATE AND CUSTOMER RECORD KEEPING
- 12 MONTH PERFORMANCE TRENDS

- CUSTOMIZABLE MATERIAL LIST
 (150 MATERIALS)
- AUTOMATED JOB CALENDAR
 (READY TO PRINT)
- PROFIT AND REVENUE INSIGHT TO GROW YOUR BUSINESS

- DETERMINE YOUR HOURLY
 LABOR RATE
- UP TO 100 JOBS

FIVE INTEGRATED CURRENCIES (USD, EUR, GBP, CAD, AUD)

- ACCOUNT FOR ALL BUSINESS

 OVERHEAD COSTS
- 4 JOB STATUSES: ESTIMATE, SCHEDULED, INVOICED, COMPLETE
- BUILT IN GUIDE NOTES

- AUTOMATED CUSTOMER

 ESTIMATES & INVOICES (READY

 TO PRINT OR EMAIL)
- JOB STATUS VISUAL CUES & TRACKING



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

PRODUCT COMPATIBILITY

SOFTWARE APPLICATION



SYSTEMS





MAC OS PRODUCT WAS BUILT WITH

MS EXCEL 365 FOR MAC







- **PRODUCT WILL FUNCTION IN MOBILE APPLICATION USES, BUT BE AWARE OF THE FOLLOWING
 - SOME FONTS MAY SHOW UP DIFFERENTLY
 - BUILT IN GUIDE NOTES
 - LOSE SOME OF THEIR FORMATTING THAT HELPS EMPHASIZE KEY POINTS
 - NOTE BOXES MAY LOOK SMALL, AND HARD TO READ WITHOUT ZOOMING IN
 - SOME CELL TEXT MAY APPEAR TO NOT FIT THE CELL WIDTH

TABS & GUIDES

TABS & GUIDES

















HOURLY LABOR RATE





**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



Enjoy Your Jashboard!

ABOUT THIS GUIDE

GUIDE POINTERS





FOR THOSE READY TO JUMP IN QUICKLY





**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.

YOUTUBE TUTORIALS

IF THERE ARE YOUTUBE TUTORIALS AVAILABLE FOR THIS PRODUCT, YOU CAN ACCESS THEM BY CLICKING ON THE YOUTUBE LOGO.



IN YOUR PRODUCT 'ABOUT' TAB

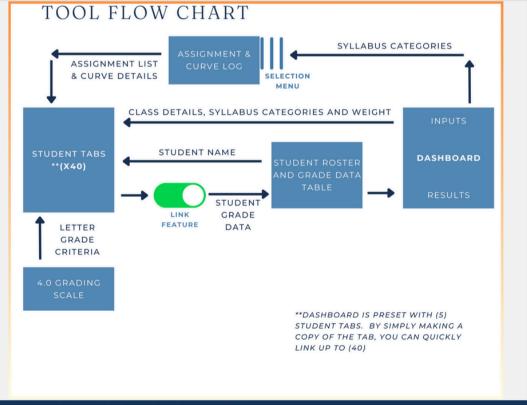


THERE IS AN ABOUT TAB IN EVERY WORKBOOK THAT INCLUDES IMPORTANT INFORMATION ABOUT YOUR DASHBOARD, AND USEFUL LINKS.

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

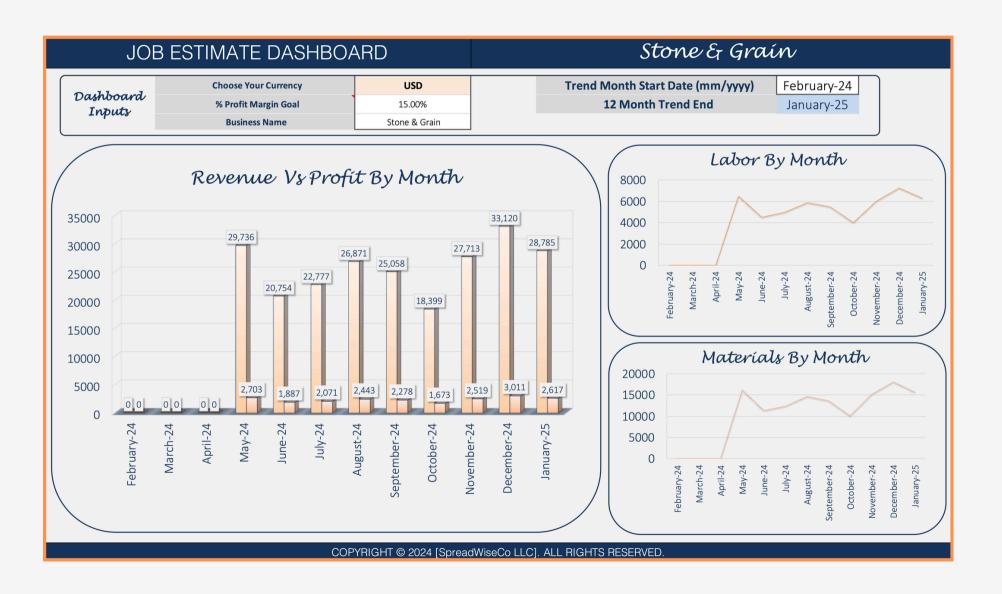
Tabs are **locked** to prevent accidental errors to formulas: Password Password Kev: "swc" Tool Inputs Your Inputs are the White Boxes With A Border! Tool Inputs Peach boxes are drop down menus **Use the downloaded guides to help you through the tool. You **PDF Guide** can Also visit our website anytime to view & download the https://spreadwiseco.com/ Site Link Google This Dashboard is Not optimized for use with Google Sheets. Sheets **For support, message us on Etsy directly from your order, or Support send an email to Sales@SpreadWiseCo.com. Pictures are LOVE IT? CLICK & LEAVE US A REVIEW! Review



1 - GETTING STARTED



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



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.

COMPANY NAME This list becomes a drop down selection within the job COMPANY NAME ADDRESS PROFESSION / SUPPLIER TYPE PRIM Jefferson's Lumber Lowes Granite Shop



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 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

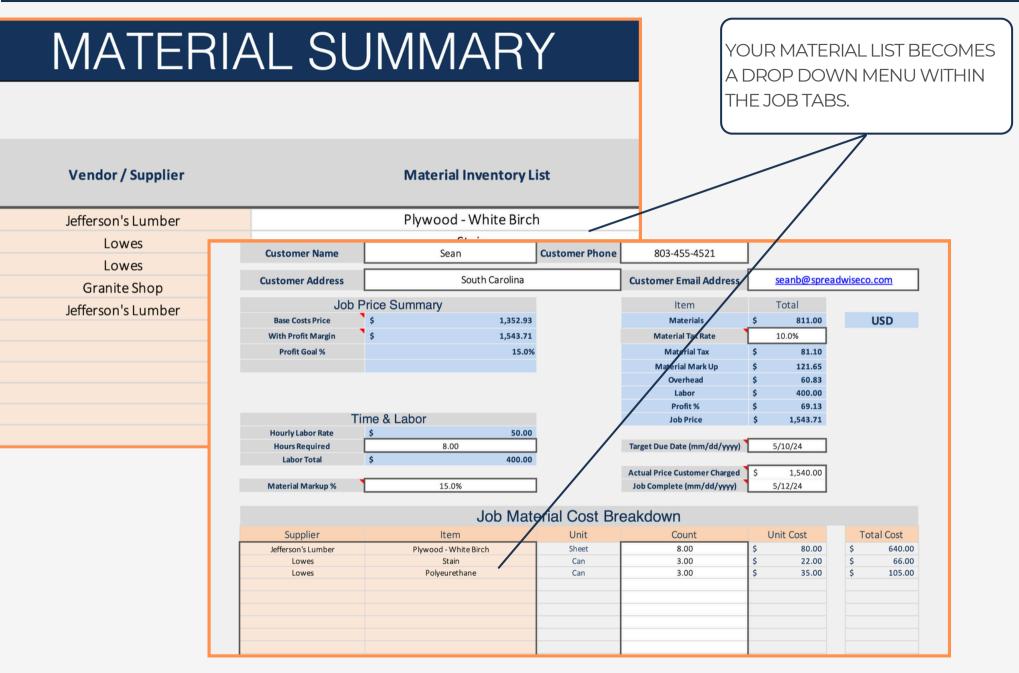
USD

Typical

#	Vendor / Supplier	Material Inventory List	Units	Receive	Cost	Cost Per Quantity
				Quantity	1	
1	Jefferson's Lumber	Plywood - White Birch	Sheet	10	\$ 800.00	\$ 80.00
2	Lowes	Stain	Can	1	\$ 22.00	\$ 22.00
3	Lowes	Polyeurethane	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					\$ -	

5 - MATERIAL SUMMARY TAB - CONTINUED





6 - OVERHEAD TAB



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

*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 **USD** 60.83 Overhead Allocation Per Job **BUSINESS OVERHEAD BREAKDØWN** Paid "X" Times / Paid Amount Item **Annualized** Yr \$ 85.00 **\$ Shop Electricity** 12 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 RATE PER MAN HOUR CHARGE TO COVER YOUR COSTS.

- **2.)** FOR EACH ROLE/JOB, INCLUDE:
 - HOURLY RATE.
 - ANNUAL HOURS

HOURLY LABOR DETERMINATION

Rate Per Man Hour	\$		24.00		USD
Role, Job		Hourly Rate		Annual Hours	Annualized Cost
Installer	\$	1	21.00	1900	\$ 39,900.00
Shop Manager	\$		27.00	1900	\$ 51,300.00
	\$		-		\$ -
	\$		-		\$ -
	\$		-		\$ -
	\$		-		\$ -
	\$		-		\$
	\$		-		\$
	\$		-		\$ -
	1				



8 - JOB TABS

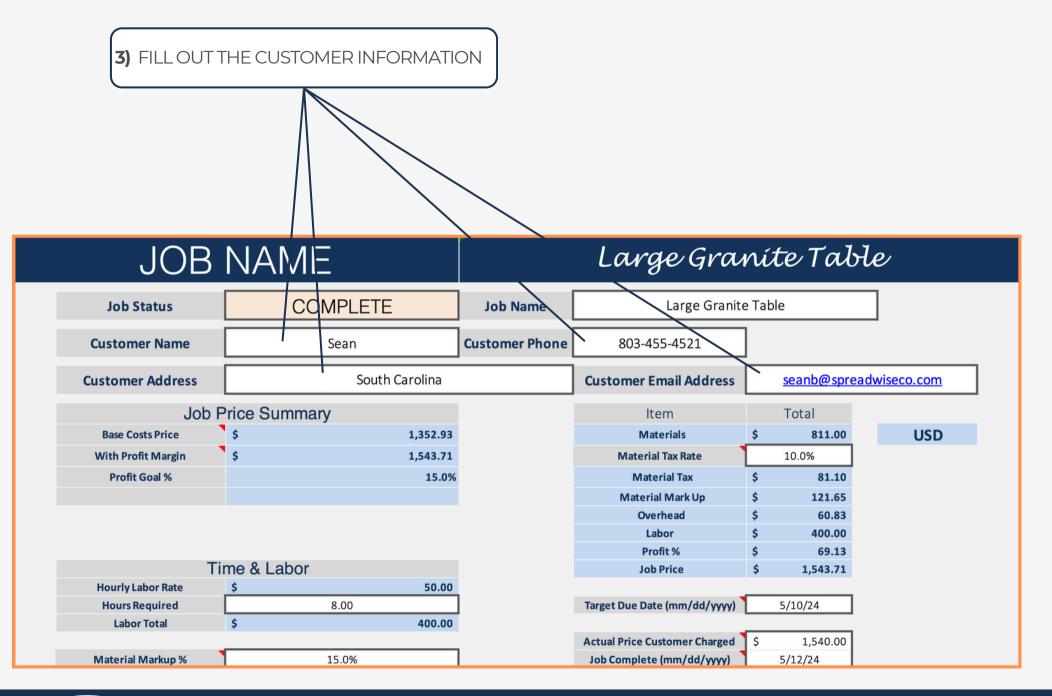


- 2) SET THE JOB STATUS (THIS WILL GENERALLY BE "ESTIMATE" WHEN CREATING A NEW JOB
 - ESTIMATE = PROVIDING A CUSTOMER ESTIMATE
 - SCHEDULE = WORK HAS BEEN SCHEDULED
 - INVOICED = WORK IS COMPLETE AND CUSTOMER HAS BEEN INVOICED
 - COMPLETE = JOB HAS BEEN PAID IN FULL

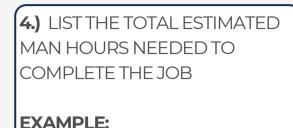
1.) SETTHE JOB NAME

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



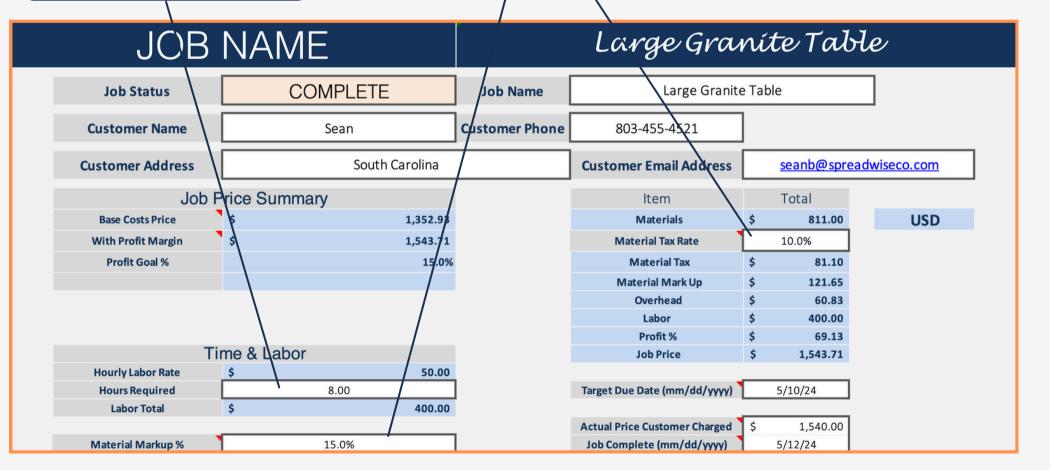




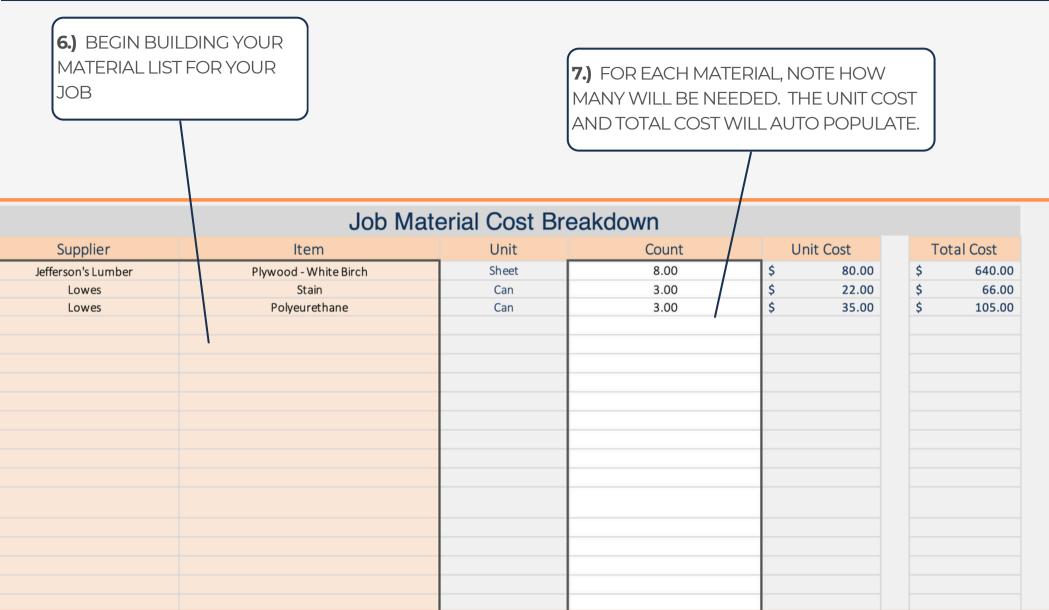


4 PEOPLE X 4 HRS = 16 MAN HOURS.







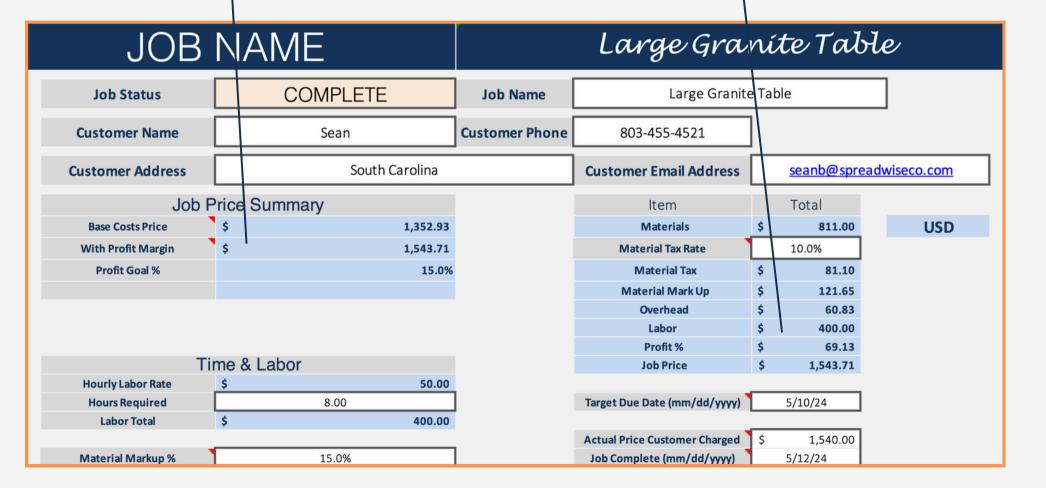




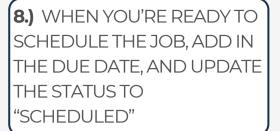
YOU'LL BE PROVIDED TWO PRICES.

- 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.



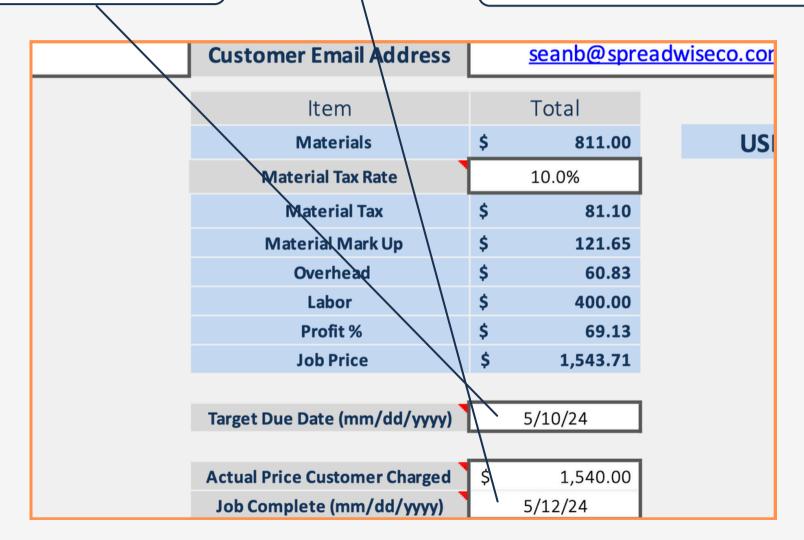




9.) WHEN THE JOB IS COMPLETE, ADD IN THE JOB COMPLETE DATE

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

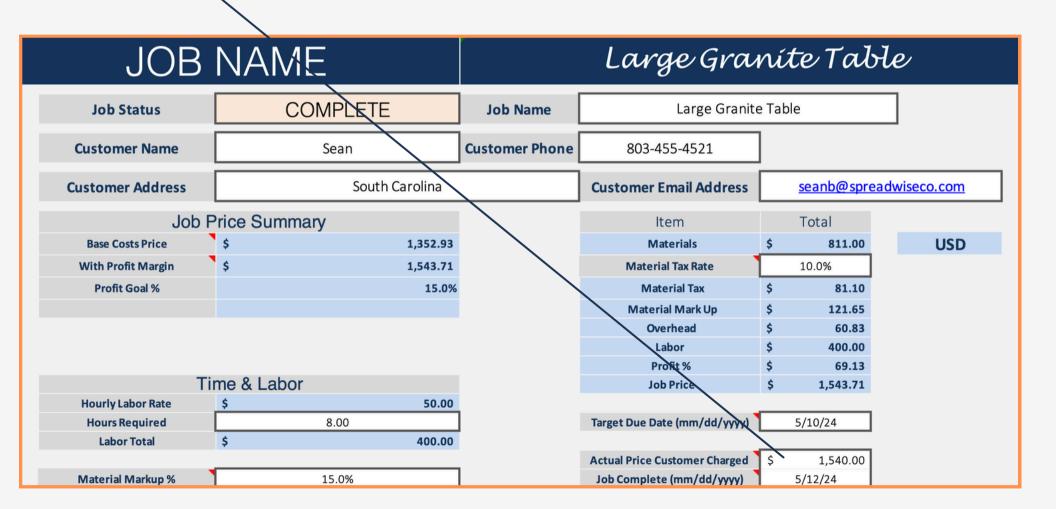
THIS ALLOWS YOU TO SEND AN ACCURATE AND FINAL INVOICE TO THE CUSTOMER.





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



15 - CUSTOMER ESTIMATE / INVOICE



1.) SELECT THE JOB FROM THE DROP DOWN MENU

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



16 - JOB LIST & SUMMARY



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

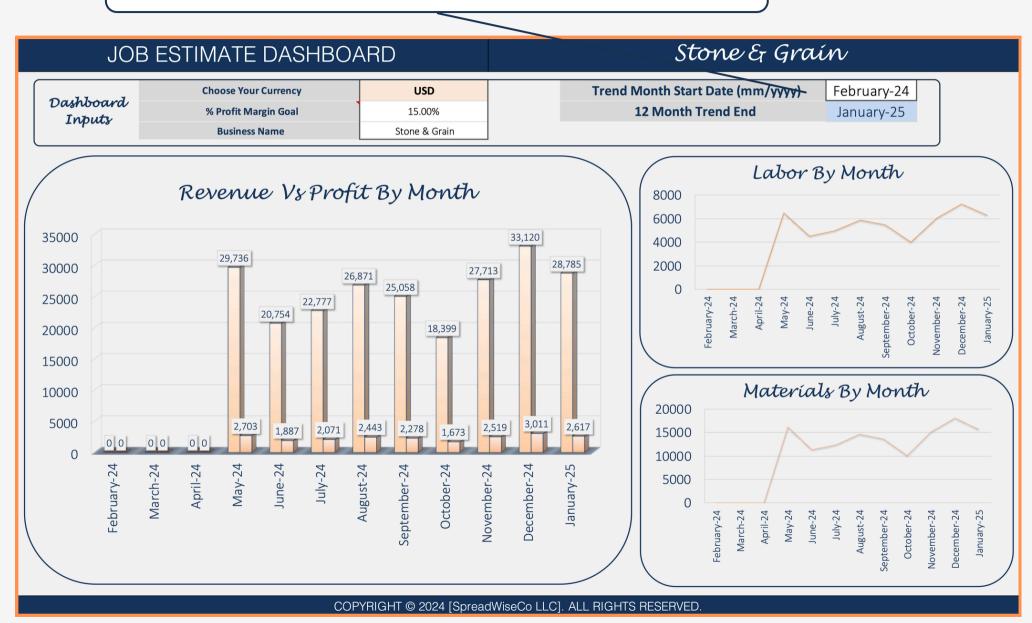
USD ESTIMATE GENERATING AN ESTIMATE FOR THE CUSTOMER INQUIRY SCHEDULED CUSTOMER HAS AGREED TO THE WORK, AND IT'S BEEN SCHEDULED INVOICED WORK HAS BEEN COMPLETED, AND FINAL INVOICE SENT TO CUSTOMER COMPLETE CUSTOMER HAS PAID IN FULL

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	1
J4	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	<i>*</i>
J5	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	<i>f</i>
J6	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	<i>f</i>
J7	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	<i>,</i>
J8	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	<i>f</i>
J9	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	<i>,</i>
J10	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	<i>I</i>
J11	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	1
J12	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	1
J13	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	1
J14	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	1
J15	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	1
J16	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	1
J17	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	1
J18	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	1
J19	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	1
J20	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	1
J21	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	1
J22	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab	1

17 - REVENUE DASHBOARD



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



18 - JOB CALENDAR



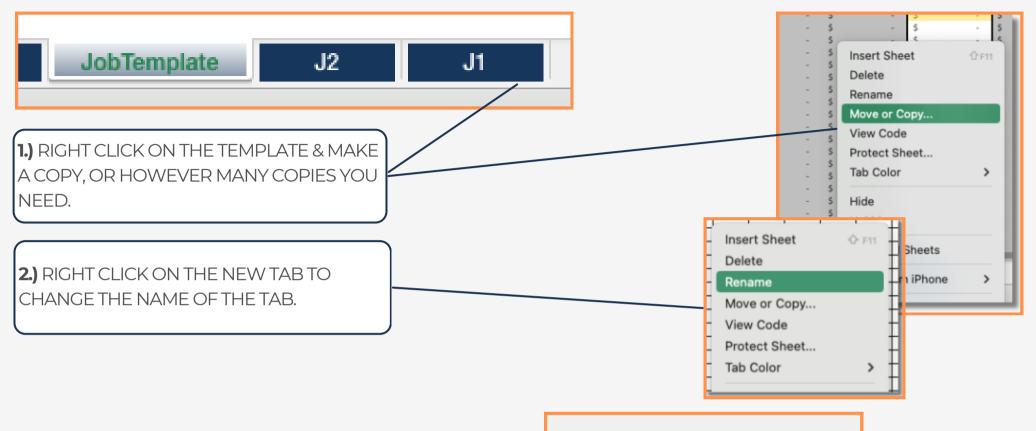
- SELECT THE CALENDAR MONTH AND YEAR, AND THE CALENDAR WILL TAKE CARE OF THE REST.
- PRINT FOR ON THE GO JOB PLANNING

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

		JOB CA	LENDAR				MAY 2024	. \	(
_	calendar year 2024	CALENDAR MONTH	1						LIPCOMING	G JOB DATES	c
L	2024	AVIAT								Customer	Da
	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	# 1	Date 5/10/24	Sean	10
				01	02	03	04	2	5/18/24	Sean	1
								3			
								4			
								5			
05		06	07	08	09	10	11	6			
						Sean		7			
								8			
								9			
12		13	14	15	16	17	18	10			
							Sean	11			
								12			
								13			
19		20	21	22	23	24	25	14			
								15			
								16			
								17			
26		27	28	29	30	31		18			
								19			
								20			
								21			
								22			
								23			
								24			
								25			

19 - ADDING JOB TABS





- **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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