

21 - JOB TAB(S) - FENCING DETAILS

DSK

EACH TYPE OF JOB TAB (WOOD, VINYL, CHAIN LINK, & ALUMINUM), WILL HAVE A SLIGHTLY DIFFERENT JOB DETAIL TABLE, SPECIFIC TO THAT FENCING TYPE.

Fencing Job Details									
Fencing Job Specifications									
Fencing Picket/Board Orientation	Horizontal	Total Fencing Feet		Supports / Section	Pickets Coverage (inches)	Finish 1 / Section	Finish 2 / Section	Finish 3 / Section	
Fencing Section Length (feet)	8	200.0		1	7	1	0	0	
Fencing Height (feet)	6								
Material Calculation Multiplier			100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Fencing Length Measurement (feet)	Fence Sections	Posts	Supports	Pickets	Finish 1 Pieces	Finish 2 Pieces	Finish 3 Pieces		
Side 1	50.0	7	7	7	72	7	0	0	
Side 2	50.0	7	7	7	72	7	0	0	
Side 3	50.0	7	7	7	72	7	0	0	
Side 4	50.0	7	7	7	72	7	0	0	
Side 5	0.0	0	0	0	0	0	0	0	
Side 6	0.0	0	0	0	0	0	0	0	
Side 7	0.0	0	0	0	0	0	0	0	
Side 8	0.0	0	0	0	0	0	0	0	
Fencing Component Count		Posts							
Corners	4	4							
Ends	0	0							
Total Gate Doors	3	3							

22 - JOB TAB(S) - WOOD FENCING DETAILS

DSK

1.) SELECT PICKET / COVERAGE ORIENTATION

- VERTICAL
- HORIZONTAL
- NO PICKETS

2.) SET YOUR FENCING SECTION LENGTH, AND HEIGHT

3.) SET THE LENGTHS OF ALL OF YOUR FENCING SIDES

- FENCING SIDE LENGTHS SHOULD INCLUDE ANY GATES

4.) SET THE TOTAL # OF CORNERS, ENDS AND GATE DOORS.

Fencing Job Details			
Fencing Picket/Board Orientation	Horizontal	Total Fencing Feet	
Fencing Section Length (feet)	8		200.0
Fencing Height (feet)	6		
Material Calculation Multiplier			100.0%
Fencing Length Measurement (feet)	Fence Sections	Posts	
Side 1	50.0	7	7
Side 2	50.0	7	7
Side 3	50.0	7	7
Side 4	50.0	7	7
Side 5	0.0	0	0
Side 6	0.0	0	0
Side 7	0.0	0	0
Side 8	0.0	0	0
Fencing Component Count		Posts	
Corners	4		4
Ends	0		0
Total Gate Doors	3		3

23 - JOB TAB(S) - WOOD FENCING DETAILS

DSK

5.) SELECT THE # OF SUPPORTS PER SECTION.

EXAMPLES:

- VERTICAL PICKETS - THIS WILL BE RAILS
- HORIZONTAL COVERAGE - THIS WILL BE VERTICAL SUPPORTS IN ADDITION TO POSTS

6.) SET YOUR PICKET COVERAGE

EXAMPLES:

- 6" BOARDS BUTTED TOGETHER WILL HAVE 6" OF ACTUAL COVERAGE
- 6" BOARDS, BOARD ON BOARD WITH 1" OVERLAP, WILL HAVE 4" OF ACTUAL COVERAGE

Fencing Job Details

Fencing Job Specifications					
Fencing Feet	Supports / Section	Pickets Coverage (inches)	Finish 1 / Section	Finish 2 / Section	Finish 3 / Section
200.0	1	7	1	0	0
	100.0%	100.0%	100.0%	100.0%	100.0%

Sections	Posts	Supports	Pickets
7	7	7	72
7	7	7	72
7	7	7	72
7	7	7	72
0	0	0	0
0	0	0	0
0	0	0	0
0	0	0	0

Posts
4
0
3

7.) IF YOU HAVE ANY FINISHES, SELECT THE TOTAL # FOR EACH WITHIN EACH SECTION. (UP TO 3 FINISHES). YOU'LL BE ABLE TO SELECT THE SPECIFIC MATERIAL FOR EACH FINISH WITH THE MATERIAL BREAKDOWN.

EXAMPLES:

- FENCING CAPS
- FASCIA BOARDS FOR COVERING THE JOINTS ON HORIZONTAL PRIVACY
- 2X2 TRIM ON RAIL FENCING WITH WIRE

24 - JOB TAB(S) - VINYL FENCING DETAILS

DSK

1.) SELECT WHETHER THE FENCE HAS VINYL PANELS OR RAILS

2.) SET YOUR FENCING SECTION LENGTH, AND HEIGHT

3.) SET THE LENGTHS OF ALL OF YOUR FENCING SIDES

- FENCING SIDE LENGTHS SHOULD INCLUDE ANY GATES

4.) SET THE TOTAL # OF CORNERS, ENDS AND GATE DOORS.

Fencing Job Details			
Vinyl Panel or Rail	Panel	Total Fencing Feet	
Fencing Section Length (feet)	8	100.0	
Fencing Height (feet)	6		
Material Calculation Multiplier		100.0%	
Fencing Length Measurement (feet)	Fence Sections	Wood Posts	
Side 1	35.0	5	5
Side 2	40.0	5	5
Side 3	25.0	4	4
Side 4	0.0	0	0
Side 5	0.0	0	0
Side 6	0.0	0	0
Side 7	0.0	0	0
Side 8	0.0	0	0
Fencing Component Count		Wood Posts	
Corners	2		2
Ends	2		2
Total Gate Doors	2		2

25 - JOB TAB(S) - VINYL FENCING DETAILS

DSK

5.) IF USING PANELS, SELECT THE PANEL WIDTHS, IN FEET.

6.) IF USING RAILS, SET THE NUMBER OF RAILS PER SECTION

Fencing Job Details					
Fencing Job Specifications					
Panel	Total Fencing Feet	Panel Coverage (Feet)		Rails Per Section	
8	100.0	8		2	
6					
Material Calculation Multiplier		100.0%	100.0%	100.0%	100.0%
Measurement (feet)	Fence Sections	Wood Posts	Middle Posts	Panels	Rails
35.0	5	5	5	5	0
40.0	5	5	5	5	0
25.0	4	4	4	4	0
0.0	0	0	0	0	0
0.0	0	0	0	0	0
0.0	0	0	0	0	0
0.0	0	0	0	0	0
0.0	0	0	0	0	0
Component Count		Wood Posts	Corner Posts	End Posts	
2		2	2		
2		2		2	
2		2		2	

26 - JOB TAB(S) - CHAIN LINK FENCING DETAILS



1.) SELECT WHETHER THE FENCE IS GALVANIZED, BLACK, OR OTHER

2.) SET YOUR FENCING SECTION LENGTH, AND HEIGHT

3.) SET THE LENGTHS OF ALL OF YOUR FENCING SIDES

- FENCING SIDE LENGTHS SHOULD INCLUDE ANY GATES

4.) SET THE TOTAL # OF CORNERS, ENDS AND GATE DOORS.

Fencing Job Details

Chainlink Type

Galvanized

Total Fencing Feet

200.0

Fencing Section Length (feet)

10

Fencing Height (feet)

5

Material Calculation Multiplier

100.0%

Fencing Length Measurement (feet)	Fence Sections	Posts
Side 1	50.0	5
Side 2	50.0	5
Side 3	50.0	5
Side 4	50.0	5
Side 5	0.0	0
Side 6	0.0	0
Side 7	0.0	0
Side 8	0.0	0

Fencing Component Count

Corners

4

Posts

4

Ends

0

0

Total Gate Doors

3

3

27 - JOB TAB(S) - CHAIN LINK FENCING DETAILS



5.) ENTER IN THE LENGTH OF THE TOP RAIL MATERIAL YOU'LL BE USING.

6.) SELECT THE LENGTH OF THE MESH ROLLS YOU'LL BE USING FOR THE JOB

Fencing Job Details

Chainlink Type	Galvanized
Fencing Section Length (feet)	10
Fencing Height (feet)	5

Fencing Job Specifications	
Total Fencing Feet	Ral Length (feet)
200.0	21.0

Material Calculation Multiplier	Ral Length (feet)	Mesh Roll Length (feet)
100.0%	100.0%	100.0%

Fencing Length Measurement (feet)	Fence Sections	Posts	Rails	Mesh Rolls
Side 1	50.0	5	2.4	1.0
Side 2	50.0	5	2.4	1.0
Side 3	50.0	5	2.4	1.0
Side 4	50.0	5	2.4	1.0
Side 5	0.0	0	0.0	0.0
Side 6	0.0	0	0.0	0.0
Side 7	0.0	0	0.0	0.0
Side 8	0.0	0	0.0	0.0

Fencing Component Count	
Corners	4
Ends	0
Total Gate Doors	3

Posts
4
0
3

28 - JOB TAB(S) - ALUMINUM FENCING DETAILS

DSK

1.) ENTER IN THE FENCE COLOR

2.) SET YOUR FENCING SECTION LENGTH, AND HEIGHT

3.) SET THE LENGTHS OF ALL OF YOUR FENCING SIDES

- FENCING SIDE LENGTHS SHOULD INCLUDE ANY GATES

4.) SET THE TOTAL # OF CORNERS, ENDS AND GATE DOORS.

Fencing Job Details

Fence Color	Black	Total Fencing Feet	95.0
Fencing Section Length (feet)	6		
Fencing Height (feet)	6		

Material Calculation Multiplier

Fencing Length Measurement (feet)	Fence Sections	
Side 1	25.0	5
Side 2	40.0	7
Side 3	30.0	5
Side 4	0.0	0
Side 5	0.0	0
Side 6	0.0	0
Side 7	0.0	0
Side 8	0.0	0

Fencing Component Count		Gate Posts
Corners	2	
Ends	0	
Total Gate Doors	2	2

29 - JOB TAB(S) - ALUMINUM FENCING DETAILS

DSK

5.) SELECT THE LENGTH OF YOUR PANELS

Fencing Job Details			
Fencing Job Specifications			
Fence Color	Black	Total Fencing Feet	Panel Length (Feet)
Fencing Section Length (feet)	6	95.0	8
Fencing Height (feet)	6		
Material Calculation Multiplier		100.0%	100.0%
Fencing Length Measurement (feet)		Fence Sections	Inner Posts
Side 1	25.0	5	5
Side 2	40.0	7	7
Side 3	30.0	5	5
Side 4	0.0	0	0
Side 5	0.0	0	0
Side 6	0.0	0	0
Side 7	0.0	0	0
Side 8	0.0	0	0
Fencing Component Count		Gate Posts	Corner Posts
Corners	2		2
Ends	0		0
Total Gate Doors	2	2	2

30 - JOB TAB(S) - FENCING DETAILS

DSK

THE MATERIAL REQUIREMENTS WILL POPULATE AUTOMATICALLY WITHIN THE TABLE.

THESE VALUES ARE USED WITHIN THE MATERIAL BREAKDOWN TO DETERMINE THE TOTAL COUNT FOR EACH PRIMARY MATERIAL

**AFTER USING THE FENCING TABLE A FEW TIMES, YOU MAY NOTICE THAT THE MATERIAL COUNT IS A LITTLE TOO LOW, OR A LITTLE TOO HIGH BASED ON YOUR USAGE AND PROCESS.

IF THIS IS THE CASE, YOU CAN USE THE MULTIPLIER ROW TO ADJUST THE COUNT.

EXAMPLE:

COUNT TOO LOW: CHANGE VALUE FROM 100% TO 110%

COUNT TOO HIGH: CHANGE VALUE FROM 100% TO 90%

Fencing Job Specifications						
Panel or Rail	Panel	Total Fencing Feet		Panel Coverage (Feet)	Rails Per Section	
Section Length (feet)	8	100.0		8	2	
Panel Height (feet)	6					
Material Calculation Multiplier			100.0%	100.0%	100.0%	100.0%
Fencing Length Measurement (feet)		Fence Sections	Wood Posts	Middle Posts	Panels	Rails
Side 1	35.0	5	5	5	5	0
Side 2	40.0	5	5	5	5	0
Side 3	25.0	4	4	4	4	0
Side 4	0.0	0	0	0	0	0
Side 5	0.0	0	0	0	0	0
Side 6	0.0	0	0	0	0	0
Side 7	0.0	0	0	0	0	0
Side 8	0.0	0	0	0	0	0
Fencing Component Count		Wood Posts		Corner Posts	End Posts	
Corners	2	2		2		
Ends	2	2			2	
Total Gate Doors	2	2			2	

31 - JOB TAB(S) - MATERIAL SELECTION

DSK

THE DIFFERENT TYPE OF JOB TABS (WOOD, VINYL, CHAIN LINK, ALUMINUM, WILL HAVE A SLIGHTLY DIFFERENT MATERIAL SELECTION TABLE, THAT DIRECTLY RELATES TO THE FENCING DETAIL TABLE SETUP, AND THE FENCING TYPE.

Fencing Job Material Breakdown						
Category	Materials	Base Cost Per Unit	Estimated Count	Actual Count	Material Base Cost	
Posts	Post-4"x4"x8'-Treated Pine	\$ 10.98	35		\$	384.30
Concrete	Concrete-50 Lbs-Sakrete Fast Setting Concrete	\$ 6.22	35		\$	217.70
Horizontal / Vertical Supports	Pine Lumber-2"x4"x8'-Treated Pine	\$ 4.63	84		\$	388.92
Fence Coverage / Pickets	Picket-5/8"x6"x6'-Treated Pine Dog Ear	\$ 2.08	448		\$	931.84
Finish Material 1						
Finish Material 2						
Finish Material 3						
Gate Type 1	Gate Frame-1-1/2" Tube Steel 60" x 47"-Wide Frame	\$ 109.75	1		\$	109.75
Gate Type 2	Gate Frame-1-1/2" Tube Steel 60" x 59"-Wide Frame	\$ 109.75	2		\$	219.50
Gate Type 3						
Fasteners	Fastener - Gun-1-3/4"-Galvanized Ring Shank - 3600 Ct	\$ 0.02	2000		\$	42.77
Fasteners	Fastener - Gun-3"-Galvanized Ring Shank - 4000 Ct	\$ 0.04	500		\$	19.25
Fasteners						
Hinges	Hardware-4 13/16" x 7.25"-Butterfly Hinge - 2 Ct	\$ 9.14	3		\$	27.42
Hinges	Hardware-8"-Strap Hinge Galvanized - 2 Ct	\$ 6.83	6		\$	40.95
Hinges						
Latches	Hardware-Powdercoated-Latch & Handle Kit - Black	\$ 15.51	2		\$	31.02
Latches						
Latches						
Other Items	Hardware-.5"x24"-Heavy Duty Gate Drop Rod - Black	\$ 12.08	1		\$	12.08
Other Items						
Other Items						
Other Items						
Other Items						

32 - JOB TAB(S) - MATERIAL SELECTION

DSK

USE THE DROP DOWN
MENUS TO SELECT YOUR
MATERIALS WITHIN EACH
CATEGORY

IF THERES A MATERIAL YOU NEED
THAT DOESN'T FIT A TYPICAL
CATEGORY, YOU CAN ADD IT HERE

Fencing Job Ma		
Category	Materials	
Posts	Post-4"x4"x8'-Treated Pine	\$
Concrete	Concrete-50 Lbs-Sakrete Fast Setting Concrete	\$
Horizontal / Veritcal Supports	Pine Lumber-2"x4"x8'-Treated Pine	\$
Fence Coverage / Pickets	Picket-5/8"x6"x6'-Treated Pine Dog Ear	\$
Finish Material 1		
Finish Material 2		
Finish Material 3		
Gate Type 1	Gate Frame-1-1/2" Tube Steel 60" x 47"-Wide Frame	\$
Gate Type 2	Gate Frame-1-1/2" Tube Steel 60" x 59"-Wide Frame	\$
Gate Type 3		
Fasteners	Fastener - Gun-1-3/4"-Galvanized Ring Shank - 3600 Ct	\$
Fasteners	Fastener - Gun-3"-Galvanized Ring Shank - 4000 Ct	\$
Fasteners		
Hinges	Hardware-4 13/16" x 7.25"-Butterfly Hinge - 2 Ct	\$
Hinges	Hardware-8"-Strap Hinge Galvanized - 2 Ct	\$
Hinges		
Latches	Hardware-Powdercoated-Latch & Handle Kit - Black	\$
Latches		
Latches		
Other Items	Hardware-.5"x24"-Heavy Duty Gate Drop Rod - Black	\$
Other Items		
Other Items		
Other Items		
Other Items		

33 - JOB TAB(S) - MATERIAL SELECTION

DSK

FOR THE KEY MATERIALS REFERENCED IN YOUR JOB DETAILS, THE COUNTS WILL AUTO-POPULATE BASED ON YOUR SELECTIONS IN THE TABLE.

1.) FOR THE OTHER MATERIALS THAT THE COUNT DOES NOT AUTO-POPULATE, YOU CAN MANUALLY ADD THE MATERIAL COUNT HERE

FOR EACH MATERIAL, THE BASE COST WILL AUTO-POPULATE BASED ON YOUR MATERIAL LIST

THIS RESULTS IN A TOTAL MATERIAL BASE COST FOR EACH MATERIAL

Fencing Job Material Breakdown						
	Materials	Base Cost Per Unit	Estimated Count	Actual Count	Material Base Cost	
	Post-4"x4"x8'-Treated Pine	\$ 10.98	35		\$	384.30
	Concrete-50 Lbs-Sakrete Fast Setting Concrete	\$ 6.22	35		\$	217.70
I Supports	Pine Lumber-2"x4"x8'-Treated Pine	\$ 4.63	84		\$	388.92
Pickets	Picket-5/8"x6"x6'-Treated Pine Dog Ear	\$ 2.08	448		\$	931.84
al 1						
al 2						
al 3						
1	Gate Frame-1-1/2" Tube Steel 60" x 47"-Wide Frame	\$ 109.75	1		\$	109.75
2	Gate Frame-1-1/2" Tube Steel 60" x 59"-Wide Frame	\$ 109.75	2		\$	219.50
3						
	Fastener - Gun-1-3/4"-Galvanized Ring Shank - 3600 Ct	\$ 0.02	2000		\$	42.77

34 - JOB TAB(S) - MATERIAL SELECTION

Down			
er Unit	Estimated Count	Actual Count	
10.98	35		\$
6.22	35		\$
4.63	84		\$
2.08	448		\$
109.75	1		\$
109.75	2		\$
0.02	2000		\$
0.04	500		\$
9.14	3		\$
6.83	6		\$
15.51	2		\$
12.08	1		\$

ESTIMATED VS ACTUAL MATERIAL USAGE

THIS SETUP SERVES **2** PURPOSES:

1.) FOR THE MATERIALS THAT THE COUNT IS AUTO-POPULATED, YOU CAN OVERWRITE THE COUNT USING THE ACTUAL COUNT COLUMN IN THE EVENT YOU DETERMINE THE COUNT IS NOT CORRECT.

2.) YOU CAN COME BACK AND USE THE ACTUAL COUNT COLUMN TO UPDATE THE ACTUAL MATERIAL USAGE AFTER THE JOB IS COMPLETE.

- THIS PROVIDES A MORE ACCURATE FINAL INVOICE VALUE FOR THE CUSTOMER.
- IT PROVIDES HISTORY IF THERE WERE ANY LAST MINUTE CHANGES, OR IF YOU OVER OR UNDER ESTIMATED YOUR NEEDED MATERIALS.

35 - JOB TAB(S) - PRICING DETAILS

DSK

1) ADD IN ANY MATERIAL TAX YOU NEED TO CHARGE THE CUSTOMER FOR

YOU'LL ALSO SEE TWO KEY PRICE VALUES:

- TOTAL BASE COST - YOUR COST TO DO THE JOB
- FINAL JOB PRICE - YOUR COST + YOUR MATERIAL AND PROFIT MARGIN GOALS (FROM YOUR DASHBOARD) ADDED IN

Job Pricing Details		
Material Total	\$	3,990.60
Material Tax Rate		8.0%
Materials Tax	\$	319.25
Overhead	\$	81.90
Installation Labor	\$	1,359.60
Removal Labor	\$	-
Total Job Base Cost	\$	5,751.35
Material Margin	\$	1,396.71
Profit %	\$	1,009.05
Job Price	\$	8,157.11

36 - JOB TAB(S) - PRICING LOCK

DSK

YOUR MATERIAL, OVERHEAD, AND LABOR COSTS ARE DIRECTLY TIED TO THOSE RESPECTIVE TABS.

IF YOU CHANGE THE UNDERLYING PRICING IN THOSE TABS, THE JOB TABS WILL AUTOMATICALLY UPDATE TO REFLECT THOSE CHANGES.

ONCE YOU'RE READY TO INVOICE THE CUSTOMER, UPDATE THE PRICE LOCK VALUES.

THIS WILL PREVENT ANY FURTHER CHANGES TO MATERIAL, OVERHEAD, OR LABOR FROM IMPACTING THE PRICING OF THE JOB, AND ASSOCIATED PROFIT CALCULATIONS.

Job Pricing Details			Price Lock
Material Total	\$	2,425.50	\$ 2,425.50
Material Tax Rate		8.0%	
Materials Tax	\$	194.04	
Overhead	\$	81.90	\$ 81.90
Installation Labor	\$	1,900.80	\$ 1,900.80
Removal Labor	\$	-	\$ -
Total Job Base Cost	\$	4,602.24	
Material Margin	\$	848.93	
Profit %	\$	1,387.89	
Job Price	\$	6,839.06	

37 - JOB TAB(S) - JOB WORKFLOW

DSK

- 1) ADD IN THE DUE DATE ONCE THE CUSTOMER HAS AGREED TO THE JOB**
- THIS WILL ALLOW THE JOB TO BE ADDED TO YOUR JOB CALENDAR

- 2) ONCE THE JOB HAS BEEN COMPLETED,, ADD IN THE ACTUAL PRICE YOU INVOICED THE CUSTOMER FOR, AND THE DATE YOU COMPLETED THE INSTALL.**
- THIS INPUTS WILL BE USED TO POPULATE YOUR MONTHLY PROFIT VS REVENUE TRACKING.

Target Due Date (mm/dd/yyyy)

1/5/25

Actual Price Customer Charged

\$ 6,800.00

Install Complete (mm/dd/yyyy)

1/5/25

THE JOB STATUS IS HOW YOU'LL MANAGE YOUR JOB WORKFLOW

ESTIMATE

GENERATING AN ESTIMATE FOR THE
CUSTOMER INQUIRE

SCHEDULED

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

INVOICED

WORK HAS BEEN COMPLETED, AND
FINAL INVOICE SENT TO THE CUSTOMER

COMPLETE

CUSTOMER HAS PAID IN FULL

39 - JOB TAB(S) - JOB WORKFLOW

DSK

USE THE JOB STATUS AND KEY DETAILS TO MANAGE YOUR JOB WORKFLOW

ESTIMATE

BLANK

BLANK

BLANK

Target Due Date (mm/dd/yyyy)

1/5/25

Actual Price Customer Charged

\$ 6,800.00

Install Complete (mm/dd/yyyy)

1/5/25

SCHEDULED

FILLED

BLANK

BLANK

Target Due Date (mm/dd/yyyy)

1/5/25

Actual Price Customer Charged

\$ 6,800.00

Install Complete (mm/dd/yyyy)

1/5/25

INVOICED

FILLED

FILLED

FILLED

Target Due Date (mm/dd/yyyy)

1/5/25

Actual Price Customer Charged

\$ 6,800.00

Install Complete (mm/dd/yyyy)

1/5/25

COMPLETE

FILLED

FILLED

FILLED

Target Due Date (mm/dd/yyyy)

1/5/25

Actual Price Customer Charged

\$ 6,800.00

Install Complete (mm/dd/yyyy)

1/5/25

40 - JOB TAB(S) - JOB PHOTO

DSK

ONCE THE JOB IS COMPLETE, YOU CAN ADD IN A JOB PHOTO FOR HISTORY AND REFERENCE LATER

- KEEP THE PHOTO SIZE TO A MINIMUM, AS HIGH RESOLUTION PHOTOS CAN FILL UP THE FILE MEMORY QUICKLY, CAUSING YOUR DASHBOARD TO BE SLOW.

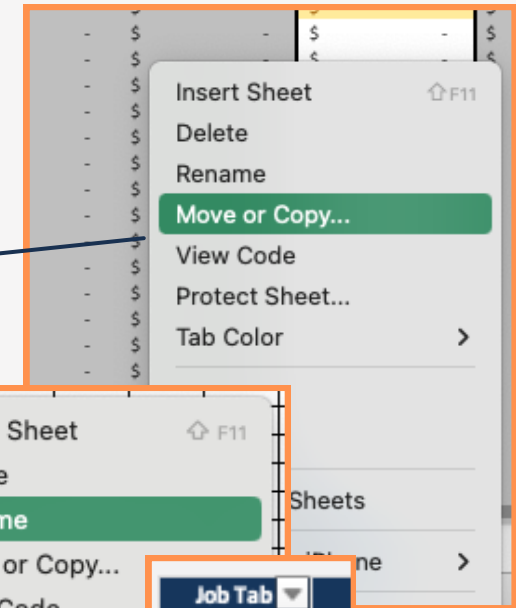


41 - ADDING JOB TABS

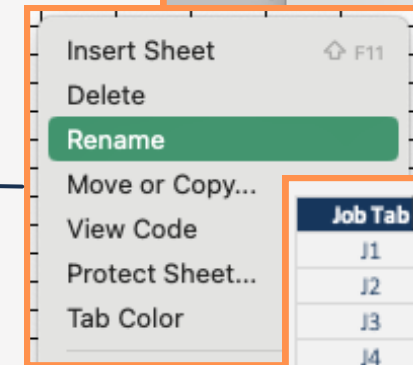
DSK



1.) RIGHT CLICK ON THE TEMPLATE YOU NEED & 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 AVAILABLE JOB TAB NUMBER FROM THE JOB SUMMARY TABLE EXACTLY.

- ONCE THE TAB IS ADDED AND RENAMED, IT WILL AUTO-LINK TO YOUR JOB SUMMARY AND DASHBOARD

Job Tab
J1
J2
J3
J4
J5
J6
J7
J8
J9
J10
J11
J12
J13
J14
J15
J16
J17
J18
J19
J20

42 - CUSTOMER ESTIMATE / INVOICE

DSK

1.) WHEN YOU'RE READY TO SEND AN ESTIMATE TO YOUR CUSTOMER, SELECT THE JOB TAB NUMBER, AND THE INVOICE TAB WILL DO THE REST.

JOB DETAILS

PRICE SUMMARY, WITH DISCOUNT INPUT

CUSTOMER INFO

MATERIAL DETAILS

CUSTOMER ESTIMATE

Your Business Name

Linwood Dr Columbia - 6' ft - Vinyl - Privacy - Panel-2.25"x6"x8'-White Freedom Emblem Vinyl - No Removal

USD

J12

803-455-4521

Mike

Linwood Dr Columbia

Materials & Labor	\$ 7,334.08
Discount	5.00%
Final Total	\$ 6,967.38
Job Completed On	Customer Estimate Only

seanb@spreadwiseco.com

Item	Description
Wood Support Posts	Wood Post-5"x5"x8'-Treated Pine
Middle Posts	Privacy Middle Post-5"x5"x9'-White Freedom Emblem Vinyl
Corner Posts	Privacy Corner Post-5"x5"x9'-White Freedom Emblem Vinyl
End Posts	Privacy End Post-5"x5"x9'-White Freedom Emblem Vinyl
Concrete	Concrete-50 Lbs-Sakrete Fast Setting Concrete
Caps	Fence Cap-5"x5"-White Freedom Vinyl

Required
20
14
2
4
20
20

43 - CUSTOMER ESTIMATE / INVOICE

DSK

AS YOUR JOB STATUS CHANGES, THE CUSTOMER INVOICE WILL UPDATE AUTOMATICALLY TO REFLECT THE PROPER STATUS.

ESTIMATE

CUSTOMER ESTIMATE		Your Business Name	
Linwood Dr Columbia - 6' ft - Vinyl - Privacy - Panel-2.25"x6'x8'-White Freedom Emblem Vinyl - No Removal			
USD		Materials & Labor	\$ 7,334.08
J12		Discount	5.00%
		Final Total	\$ 6,967.38
803-455-4521	Mike	Job Completed On	Customer Estimate Only
Linwood Dr Columbia		seanb@spreadwiseco.com	

INVOICED

CUSTOMER INVOICE		Your Business Name	
Linwood Dr Columbia - 4' ft - Wood - Rail - No Pickets - No Removal			
USD		Materials & Labor	\$ 2,662.43
J11		Discount	5.00%
		Final Total	\$ 2,529.31
803-455-4521	Sean	Job Completed On	10/3/25
Linwood Dr Columbia		seanb@spreadwiseco.com	

44 - MATERIAL PULL LIST

DSK

1.) WHEN YOU'RE READY TO DO THE JOB, USE THE DROP DOWN MENU TO SELECT THE JOB #, AND THE EVERYTHING ELSE WILL AUTO-POPULATE, PROVIDING YOU WITH A SIMPLE MATERIAL LIST TO USE FOR THE JOB.

JOB DETAILS

MATERIAL
DETAILS

MATERIAL COUNTS

MATERIAL PULL LIST

Your Business Name

Linwood Dr Columbia - 6' ft - Wood - Privacy - Picket-5/8"x6"x6'-Treated Pine Dog Ear - No Removal

J1

03-455-4521

Sean

Linwood Dr Columbia

seanb@spreadwiseco.com

*Print the document, then
for manually notating
materials pulled, and
returned "Not Used"

Item	Description	Estimated Count	Actual Count	Pulled	Returned
Posts	Post-4"x4"x8'-Treated Pine	35			
Concrete	Concrete-50 Lbs-Sakrete Fast Setting Concrete	35			
Vertical Supports	Pine Lumber-2"x4"x8'-Treated Pine	84			

45 - MATERIAL PULL LIST

DSK

PULLED VS RETURNED:

IF YOU'RE USING THE INVENTORY TRACKERS, YOU CAN USE THE PULL SHEET TO DOCUMENT WHAT YOU PULLED FROM INVENTORY, AND WHAT YOU RETURNED. THESE VALUES CAN THEN BE USED TO UPDATE YOUR INVENTORY TRACKERS.

Business Name

Year - No Removal

**Print the document, then use this for manually notating the materials pulled, and then returned "Not Used"*

<i>Count</i>	<i>Pulled</i>	<i>Returned</i>

46 - JOB CALENDAR

DSK

1.) SELECT A MONTH AND YEAR

THE CALENDAR WILL POPULATE WITH THE JOB DUE DATES FOR THAT MONTH, BY CUSTOMER NAME

YOU'LL ALSO SEE THE NEXT 25 JOBS THAT ARE UPCOMING

FENCE JOB CALENDAR				FEBRUARY 2025			
CALENDAR YEAR		CALENDAR MONTH		MONTHLY REVENUE			
2025		FEBRUARY		\$ 15,428			
	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	-	-	-	-	-	-	01
1							
2							
3							
	02	03	04	05	06	07	08
1				Mike-27 Hrs			
2							
3							
	09	10	11	12	13	14	15
1		Kevin-64 Hrs					
2							
3							
	16	17	18	19	20	21	22
1							
2							
3							
	23	24	25	26	27	28	-
1							
2							
3							
	-	-	-	-	-	-	-
1							
2							
3							

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

1

2

3

4

5

6

7

8

9

10

11

12

UPCOMING JOBS				
#	Date	Customer	Revenue	Day
1	2/5/25	Mike-27 Hrs	\$ 7,723	5
2	2/10/25	Kevin-64 Hrs	\$ 7,705	10
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
21				
22				
23				
24				
25				

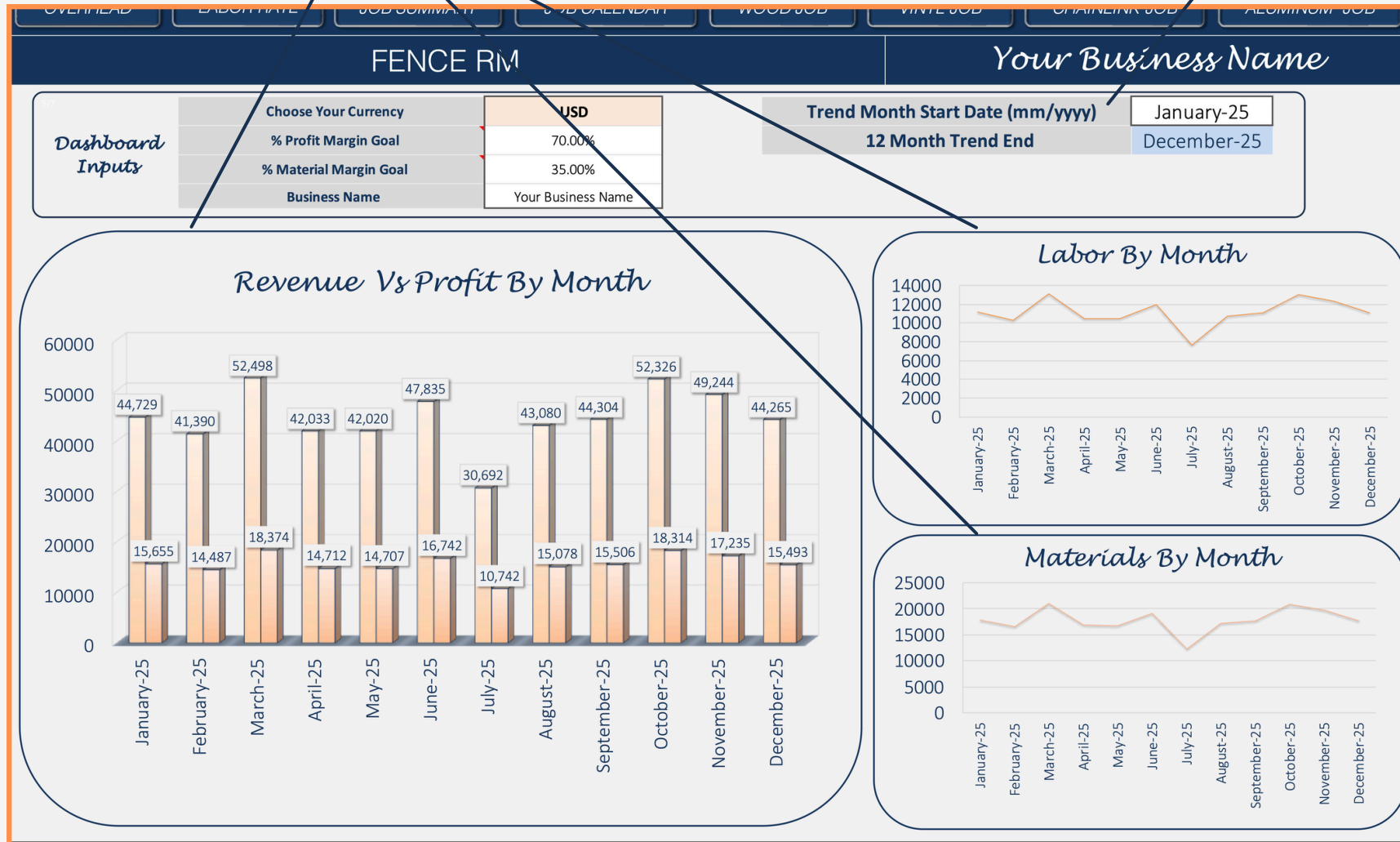
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47 - DASHBOARD RESULTS

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THE GRAPHS WILL THEN POPULATE BASED ON YOUR DATE SELECTION

1.) SET THE 12 MONTH PERIOD YOU WAN TO REVIEW



48 - JOB SUMMARY

DSK

THE JOB SUMMARY TABLE IS 100% AUTOMATIC. IT PROVIDES QUICK ACCESS TO THE FOLLOWING:

- JOB NAMES & HISTORY
- CUSTOMER INFO
- JOB STATUS AND MANAGEMENT
- PROFIT & REVENUE DETAILS FOR EACH JOB

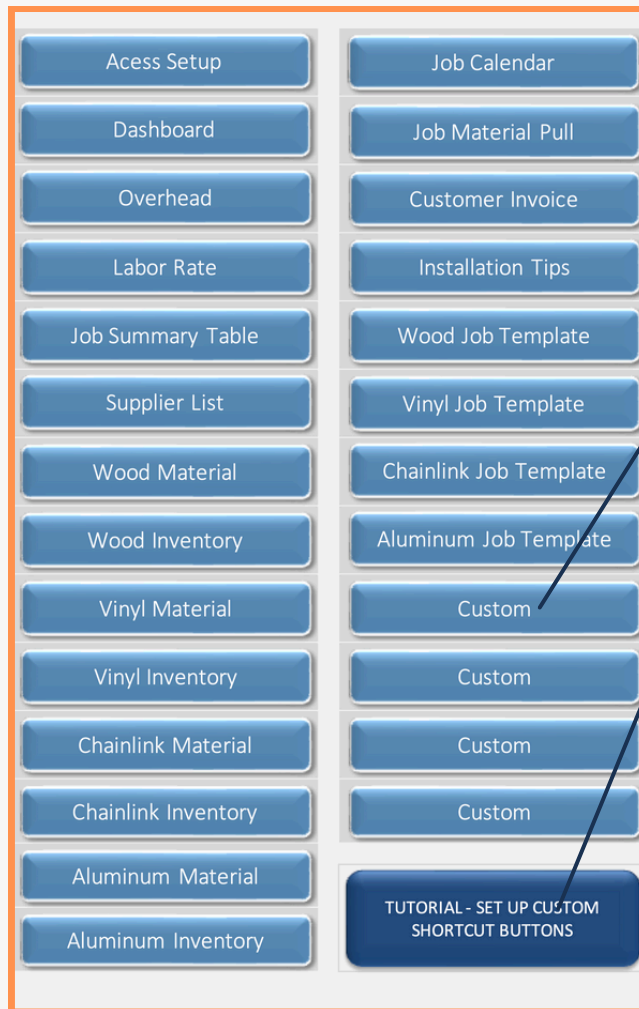
DASHBOARD CUSTOMER INVOICE JOB CALENDAR MATERIAL PULL WOOD ESTIMATE VINYL ESTIMATE CL ESTIMATE ALUMINUM ESTIMATE							
JOB & CUSTOMER LIST & SUMMARY							Your Business Name
USD		ESTIMATE	GENERATING AN ESTIMATE FOR THE CUSTOMER INQUIRY				
		SCHEDULED	CUSTOMER HAS AGREED TO THE WORK, AND IT'S BEEN SCHEDULED				
		INVOICED	WORK HAS BEEN COMPLETED, AND FINAL INVOICE SENT TO CUSTOMER				
		COMPLETE	CUSTOMER HAS PAID IN FULL				
Job Tab	Job Name	Status	Customer Name	Customer Email	Base Cost Price	Actual Sale Price	Net Profit
J1	Linwood Dr Columbia - 6' ft - Wood - Privacy - Picket-5/8"x6"x6'-Treated Pine Dog Ear - No Removal	COMPLETE	Sean	seanb@spreadwiseco.com	\$ 4,602.24	\$ 6,800.00	\$ 2,197.
J2	Linwood Dr Columbia - 6' ft - Wood - Privacy - Picket-5/8"x6"x6'-Treated Pine Dog Ear - With Removal	COMPLETE	Sean	seanb@spreadwiseco.com	\$ 5,077.44	\$ 7,600.00	\$ 2,522.
J3	Linwood Dr Columbia - 6' ft - Wood - Shadowbox - Picket-19/32"x6"x6'-Cedar Dog Ear - With Removal	COMPLETE	Sean	seanb@spreadwiseco.com	\$ 7,884.75	\$ 11,500.00	\$ 3,615.
J4	Linwood Dr Columbia - 6' ft - Wood - Board on Board - Picket-5/8"x6"x6'-Treated Pine Dog Ear - With Removal	COMPLETE	Sean	seanb@spreadwiseco.com	\$ 6,677.83	\$ 9,900.00	\$ 3,222.
J5	Linwood Dr Columbia - 6' ft - Wood - Horizontal Coverage - Pine Lumber-1"x6"x8'-Treated Pine - With Removal	COMPLETE	Sean	seanb@spreadwiseco.com	\$ 6,023.26	\$ 8,800.00	\$ 2,776.
J6	Linwood Dr Columbia - 6' ft - Wood - Privacy With Metal Posts - Picket-5/8"x6"x6'-Treated Pine Dog Ear - With Removal	COMPLETE	Sean	seanb@spreadwiseco.com	\$ 6,061.75	\$ 8,900.00	\$ 2,838.
J7	Linwood Dr Columbia - 6' ft - Wood - Privacy Cap & Trim - Pine Lumber-1"x6"x6'-Treated Pine - No Removal	COMPLETE	Sean	seanb@spreadwiseco.com	\$ 5,751.35	\$ 8,100.00	\$ 2,348.
J8	Linwood Dr Columbia - 6' ft - Wood - Rail With Wire / Metal Coverage - No Pickets - No Removal	COMPLETE	Sean	seanb@spreadwiseco.com	\$ 2,746.92	\$ 4,000.00	\$ 1,253.
J9	Linwood Dr Columbia - 6' ft - Wood - Rail With Wire / Metal Coverage - No Pickets - No Removal	COMPLETE	Sean	seanb@spreadwiseco.com	\$ 2,746.92	\$ 4,000.00	\$ 1,253.
J10	Linwood Dr Columbia - 6' ft - Wood - Rail With Wire / Metal Coverage - No Pickets - No Removal	COMPLETE	Sean	seanb@spreadwiseco.com	\$ 3,816.00	\$ 5,400.00	\$ 1,584.
J11	Linwood Dr Columbia - 4' ft - Wood - Rail - No Pickets - No Removal	INVOICED	Sean	seanb@spreadwiseco.com	\$ 1,746.61	\$ 4,000.00	\$ 2,253.
J12	Linwood Dr Columbia - 6' ft - Vinyl - Privacy - Panel-2.25"x6"x8'-White Freedom Emblem Vinyl - No Removal	SCHEDULED	Mike	seanb@spreadwiseco.com	\$ 5,290.91	Update Job Tab	
J13	Linwood Dr Columbia - 6' ft - Vinyl - Rail - No Panels - No Removal	SCHEDULED	Susan	seanb@spreadwiseco.com	\$ 1,135.56	Update Job Tab	
J14	Linwood Dr Columbia - 5' ft - Wood - Privacy - Galvanized - No Removal	SCHEDULED	Kevin	seanb@spreadwiseco.com	\$ 4,963.05	Update Job Tab	
J15	Linwood Dr Columbia - 6' ft - Aluminum - Black - No Removal	ESTIMATE	John	seanb@spreadwiseco.com	\$ 3,078.42	Update Job Tab	
J16	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	

49 - HOME TAB - SHORTCUT PANEL

DSK

USE THE INCLUDED SHORTCUT PANEL TO QUICKLY NAVIGATE THE ENTIRE WORKBOOK. EVEN BETTER, YOU CAN CUSTOMIZE SOME BUTTONS AS NEEDED FOR ANY TABS YOU DECIDE TO ADD.

** YOU WILL NEED TO UNLOCK THE TAB TO LINK A NEW BUTTON. USE THE TUTORIAL TO HELP GUIDE YOU THROUGH THE PROCESS!



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