# PRO 37 JOB TABS - SHORTCUT BAR, AND ACCESS LEVEL

KEY TAB SHORTCUTS AT THE TOP OF EVERY JOB TAB FOR FASTER NAVIGATION

JOB SUMMARY

JOB CALENDAR

MATERIAL PULL

**WOOD INVENTORY** 

CUSTOMER INVOICE

WOOD MATERIAL

**Access Code** 

THERE IS AN ACCESS CODE SETUP, WHICH HIDES
KEY FINANCIAL DETAILS WITHIN EACH JOB TAB.
LET YOUR CREW HANDLE THE ESTIMATES, AND
KEEP YOUR BUSINESS FINANCIAL DETAILS PRIVATE.

#### CURRENT ACCESS

	job Pri	cing Summa	ry		
Job Pricing Su	Job Pricing Details				
Base Costs Price	\$	5,751.35	Material Total	\$	3,990.60
With Profit & Material Margin	\$	8,157.11	Material Tax Rate		8.0%
Profit Goal %		70.0%	Materials Tax	\$	319.25
Material Margin %		35.0%	Overhead	\$	81.90
			Installation Labor	\$	1,359.60
Installation Time	& Labor		Removal Labor	\$	-
Hourly Labor Rate	\$	29.70	Total Job Base Cost	\$	5,751.35
Man Hours Required Per 2 Ft		0.89	Material Margin	\$	1,396.71
Labor Total	\$	1,359.60	Profit %	\$	1,009.05
Total Installation Man Hours		45.78	Job Price	\$	8,157.11
Removal Time	& Labor				
Hourly Labor Rate	\$	29.70			
Man Hours Required Per 2 Ft		0.16			
Labor Total	\$	-			
Total Removal Man Hours		0.00	USD		





# PRO 38 AUTOMATED CUSTOMER ESIMATE / INVOICE SUMMAR

INVOICE SUMMARY
WITH DISCOUNT INPUT

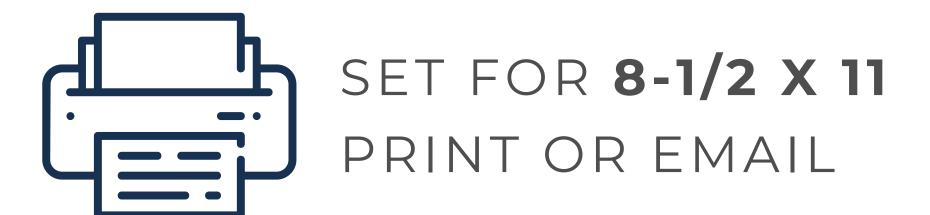
AUTO JOB NAME VISUAL

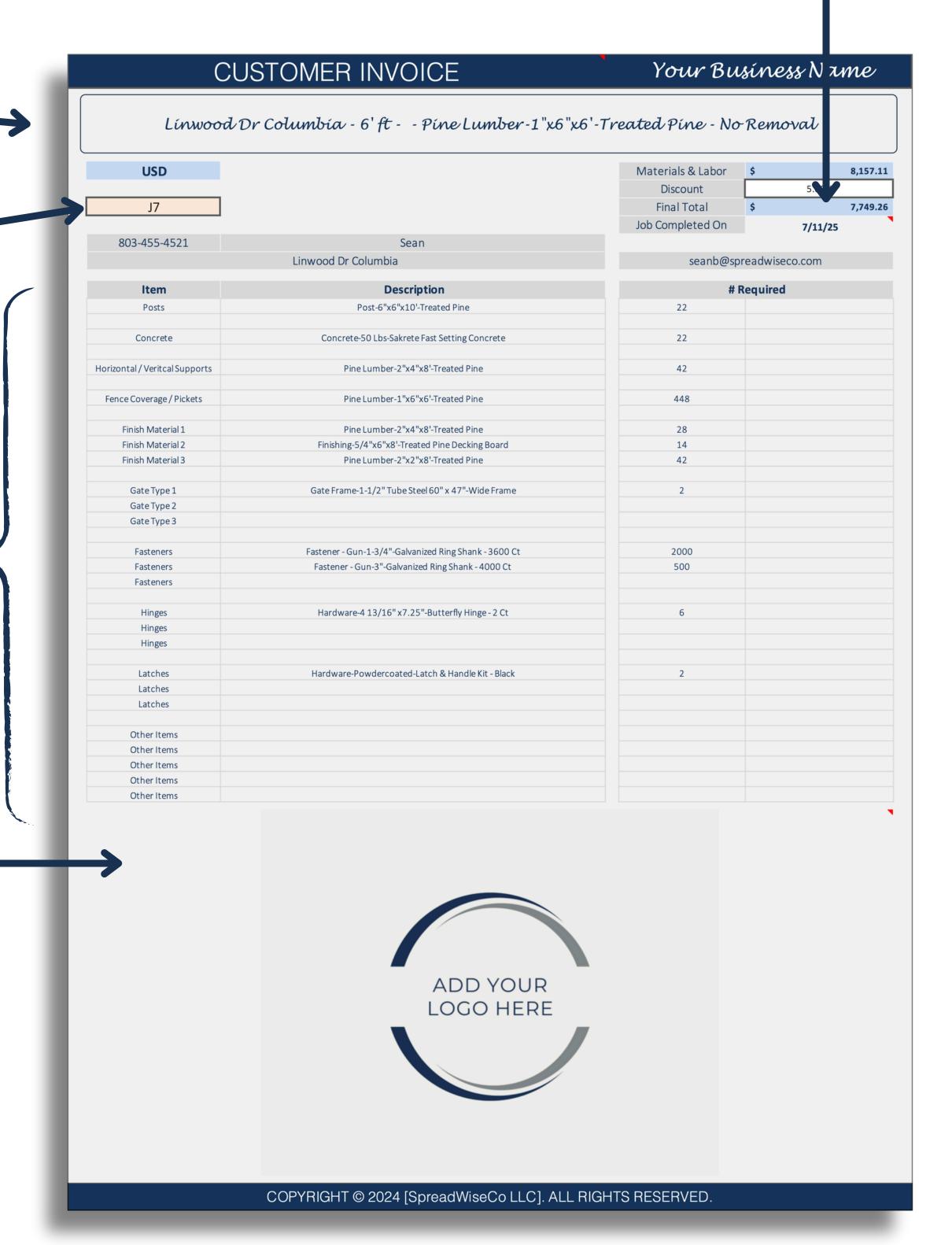
USE THE QUICK SELECTION MENU
TO SELECT YOUR JOB #.

EVERYTHING ELSE IS AUTOMATIC.

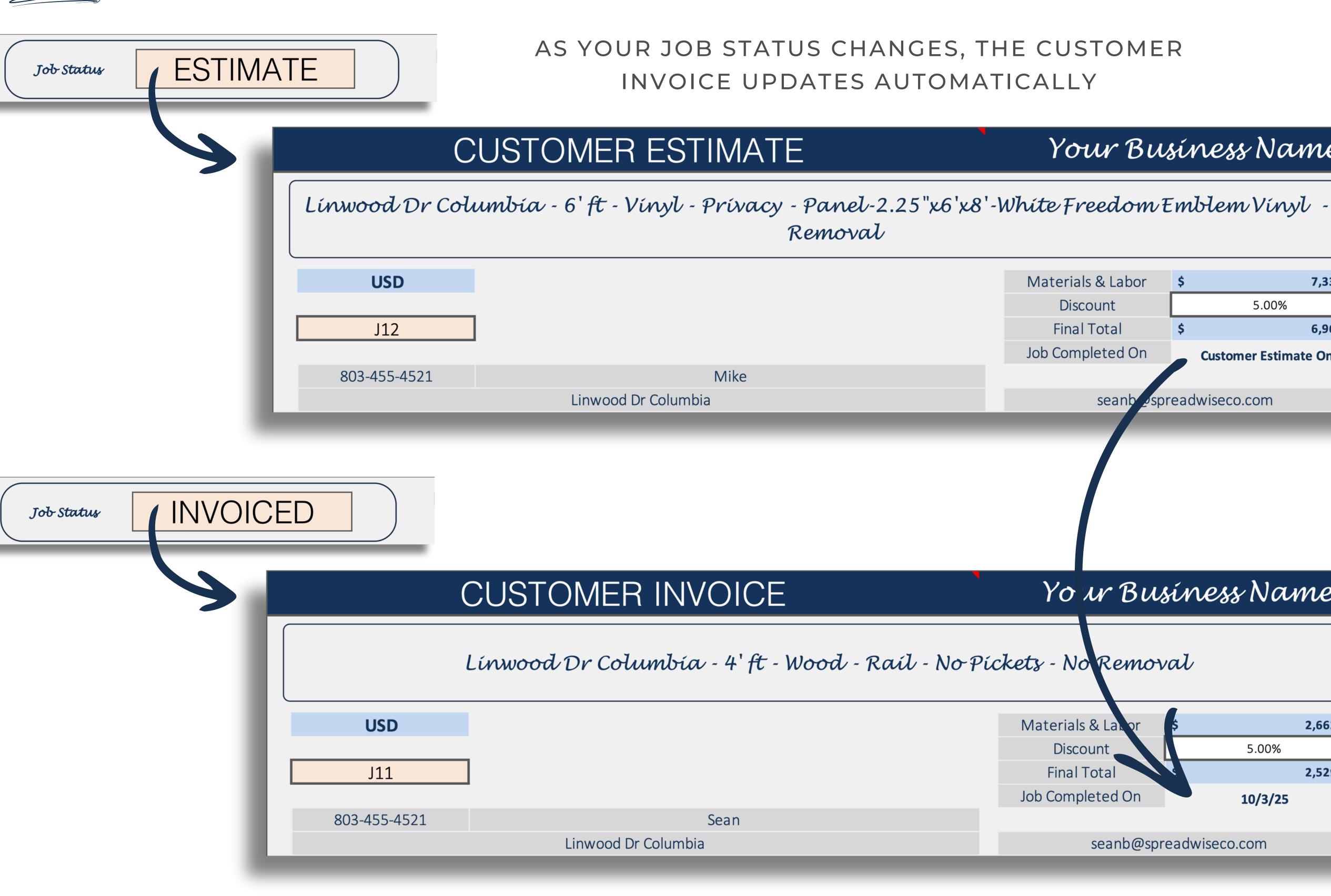
SIMPLIFIED MATERIAL LIST FOR CUSTOMER

ADD IN YOUR OWN
BUSINESS LOGO AT
THE BOTTOM





## PRO 39 CUSTOMER INVOICE & JOB STATUS



# PRO 40 AUTOMATED JOB INVENTORY PULL LIST FOR YOUR CREW



AUTOMATED JOB & CUSTOMER DETAILS

Other Items
Other Items
Other Items
Other Items

CHECKLIST FOR THE CREW
TO TRACK MATERIALS
PULLED, AND RETURNED

QUICK SELECTION
MENU TO CHOOSE
THE JOB TO PULL
MATERIALS FOR

AUTOMATED
MATERIAL LIST &
COUNT BASED
ON THE JOB
SELECTED



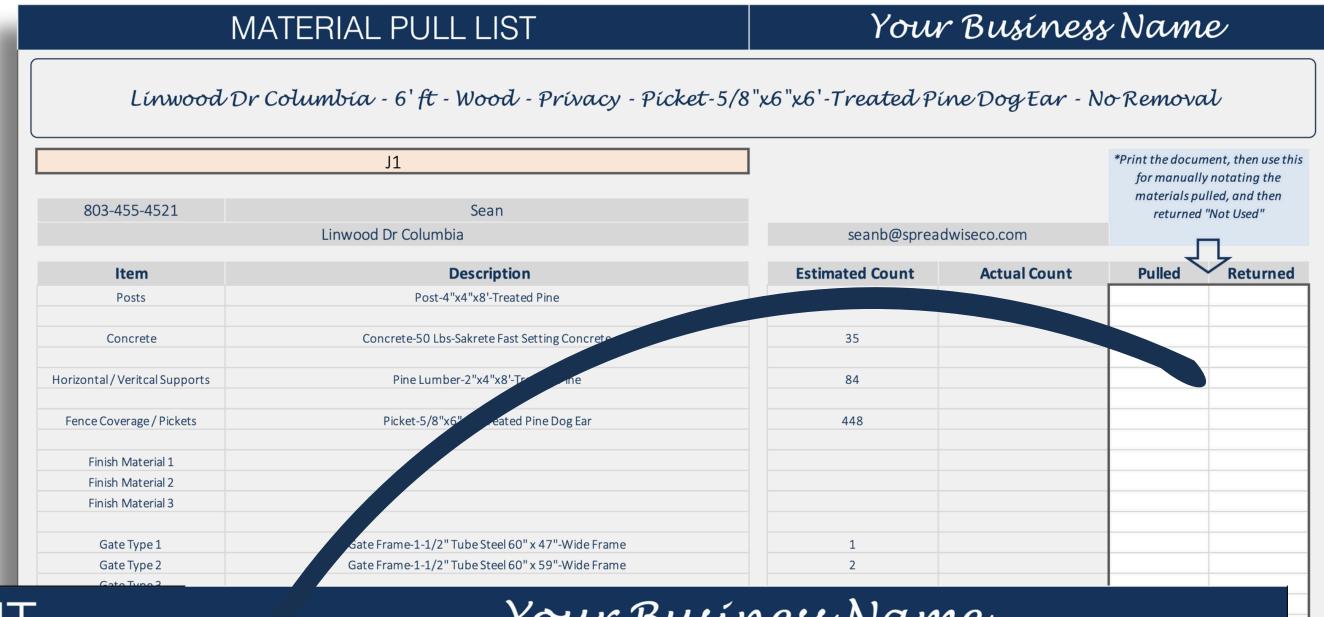
Your Business Name MATERIAL PULL LIST Línwood Dr Columbia - 6' ft - Wood - Prívacy - Picket-5/8"x6"x6"x6'-Treated Pine Dog Ear - No Removal \*Print the document, the for manually notatin materials pulled, and 803-455-4521 Sean returned "Not Use seanb@spreadwiseco.com Linwood Dr Columbia **Estimated Count Actual Count Pulled** Description Item Post-4"x4"x8'-Treated Pine Concrete Concrete-50 Lbs-Sakrete Fast Setting Concrete 35 84 Horizontal / Veritcal Supports Pine Lumber-2"x4"x8'-Treated Pine Fence Coverage / Pickets Picket-5/8"x6"x6'-Treated Pine Dog Ear 448 Finish Material 1 Finish Material 2 Finish Material 3 Gate Frame-1-1/2" Tube Steel 60" x 47"-Wide Frame Gate Type 1 Gate Type 2 Gate Frame-1-1/2" Tube Steel 60" x 59"-Wide Frame Gate Type 3 Fastener - Gun-1-3/4"-Galvanized Ring Shank - 3600 Ct 2000 Fasteners **Fasteners** Fastener - Gun-3"-Galvanized Ring Shank - 4000 Ct 500 Fasteners Hardware-4 13/16" x7.25"-Butterfly Hinge - 2 Ct Hinges Hardware-8"-Strap Hinge Galvanized - 2 Ct Hinges Hardware-Powdercoated-Latch & Handle Kit - Black Latches Latches Latches Hardware-.5"x24"-Heavy Duty Gate Drop Rod - Black Other Items

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## PRO 41 DETAILED INVENTORY TRACKING &

MANAGEMENT

USE THE CREW PULL SHEETS TO
PROVIDE THE NEEDED DETAIL TO
UPDATE YOUR INVENTORY LEVELS
FOR EACH FENCE TYPE



	WOOD INVENTORY MANAGEMENT					Your Business Name							
	Value On Hand	\$ 17,	194.50	*Initial Setup Note						USD			
	Received	22	,740.00	*Inventory Correction Note									
	Used \$	(5	,545.50)	, and the second									
			•		Quantity			O amtitu	Running	Dunning	Committee		
	Date (MM/DD/YYYY)	Received	Used	Material Inventory Selection	Received Used		Cost	Quantity +/-	Inventory	Running Inventory Value	Cumulative Value	Details & Comments	
T	1/10/25	Received		Post-4"x4"x8'-Treated Pine	500.00	\$	5,490.00	500.00	500.00	\$ 5,490.00	\$ 5,490.00	Regular Shipment	
	1/11/25		Used	Post-4"x4"x8'-Treated Pine	150.00	\$	(1,647.00)	150.00	650.00	\$ 3,843.00	\$ 3,843.00		
	1/12/25	Received		Picket-19/32"x6"x6'-Cedar Dog Ear	5000.00	\$	17,250.00	5000.00	5000.00	\$ 17,250.00	\$ 21,093.00		
	1/13/25		Used	Picket-19/32"x6"x6'-Cedar Dog Ear	650.00	\$	(2,242.50)	650.00	5650.00	\$ 15,007.50	\$ 18,850.50		
	1/14/25		Used	Picket-19/32"x6"x6'-Cedar Dog Ear	480.00	\$	(1,656.00)	480.00	6130.00	\$ 13,351.50	\$ 17,194.50		
4													
1													
1													
+													
+						-							
+													
+													
+					-								
+													
H													
H													

## PRO 42 AUTOMATED JOB CALENDAR

Target Due Date (mm/dd/yyyy)

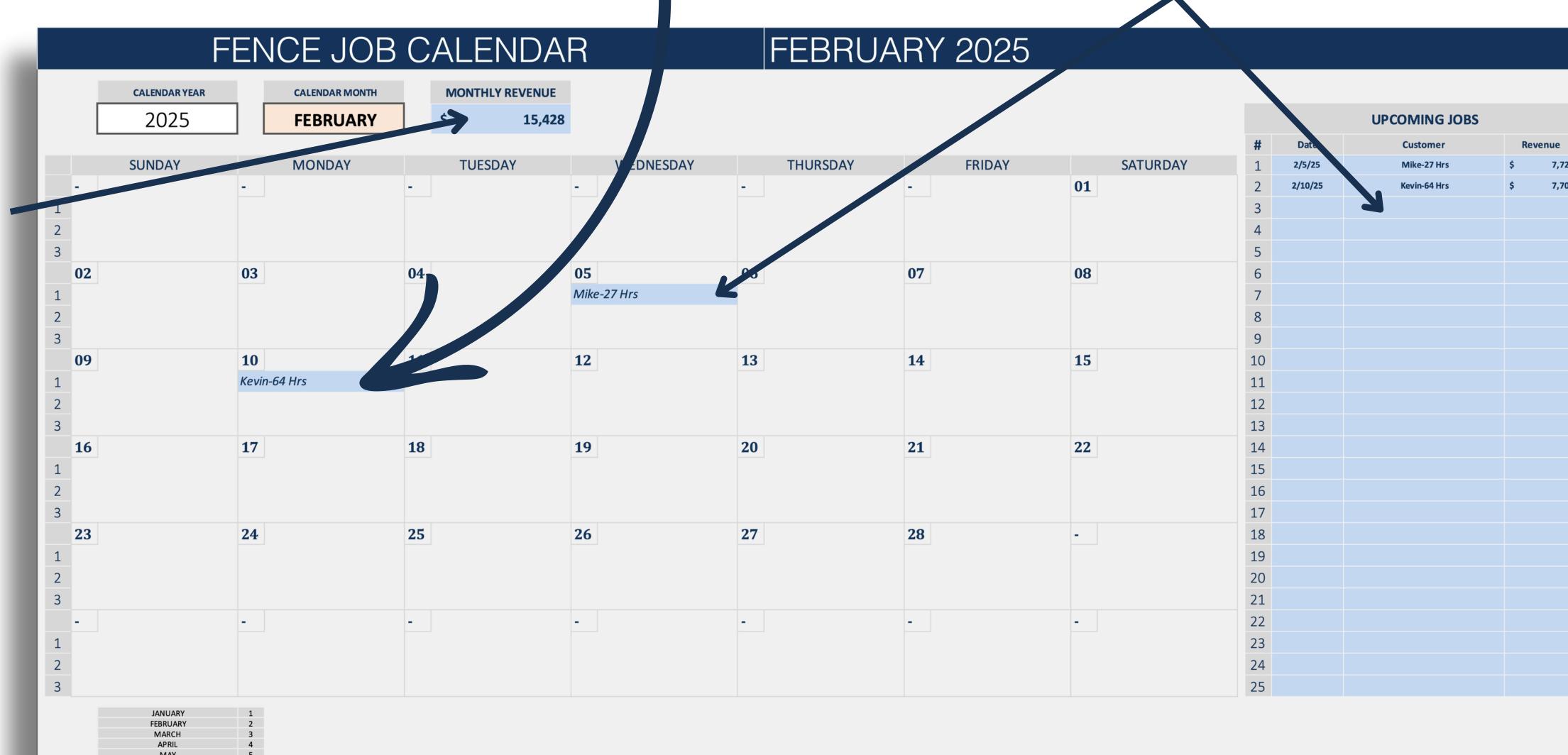
Actual Price Customer Charged

Install Complete (mm/dd/yyyy)

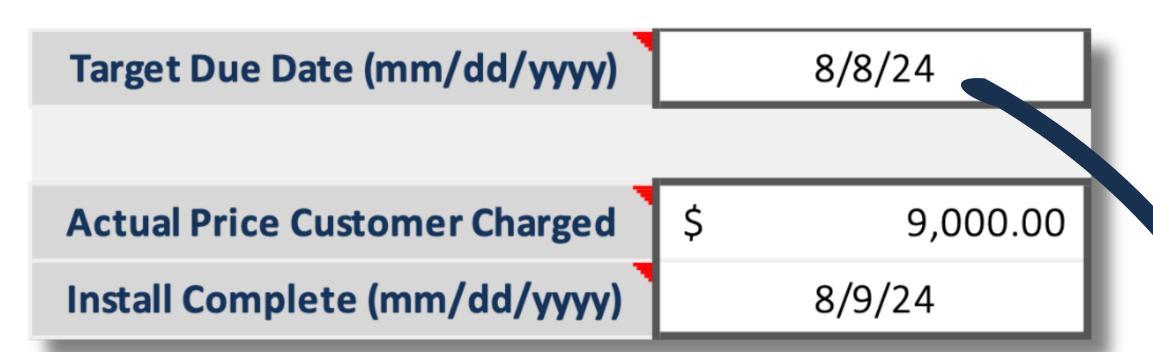
EACH JOB TAB HAS A DETAILED SUMMARY, WITH KEY **DATES** AND **MAN HOURS** FOR JOB PLANNING

UPCOMING JOB DUE
DATES BY CUSTOMER

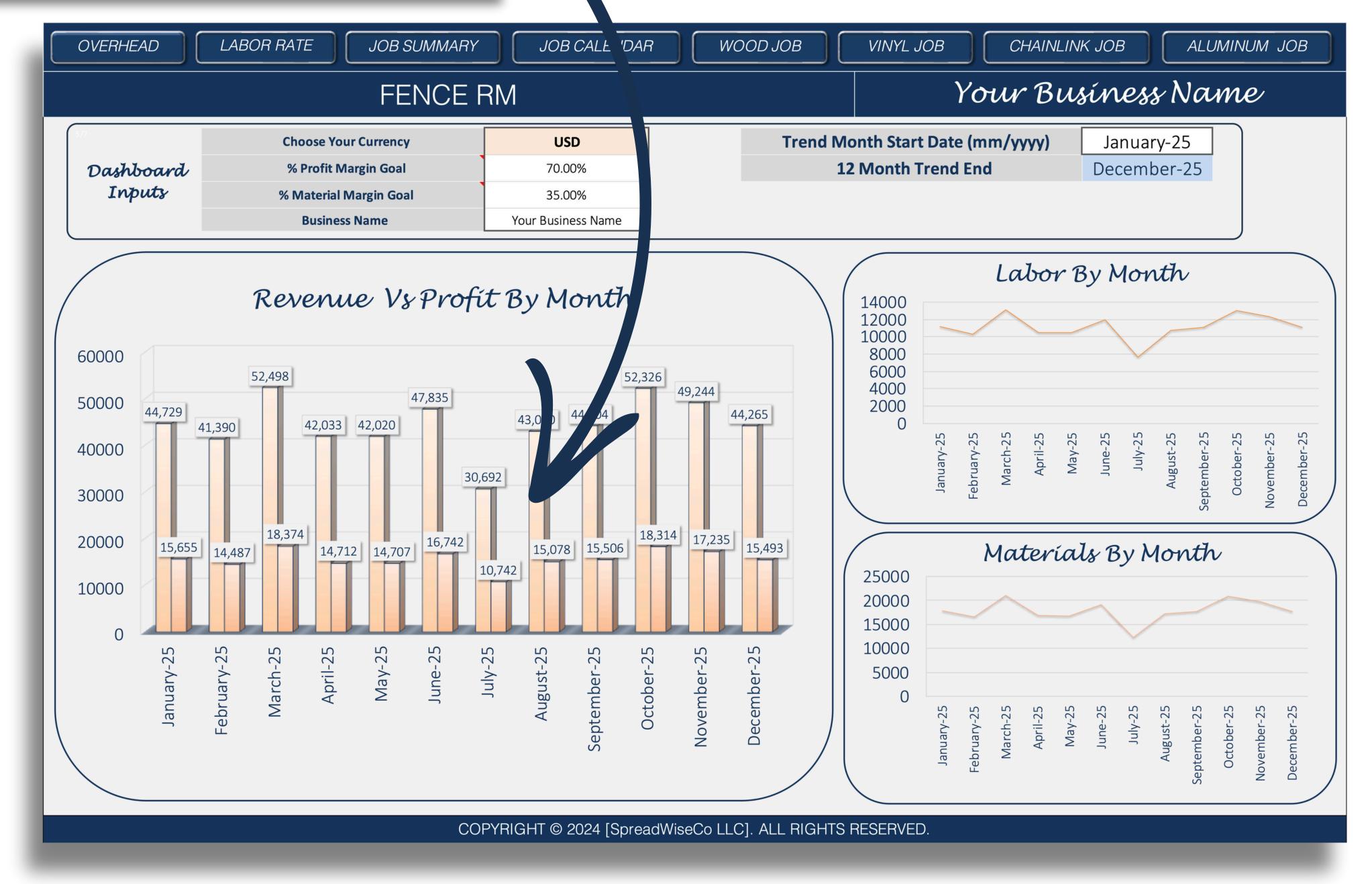
MONTHLY REVENUE



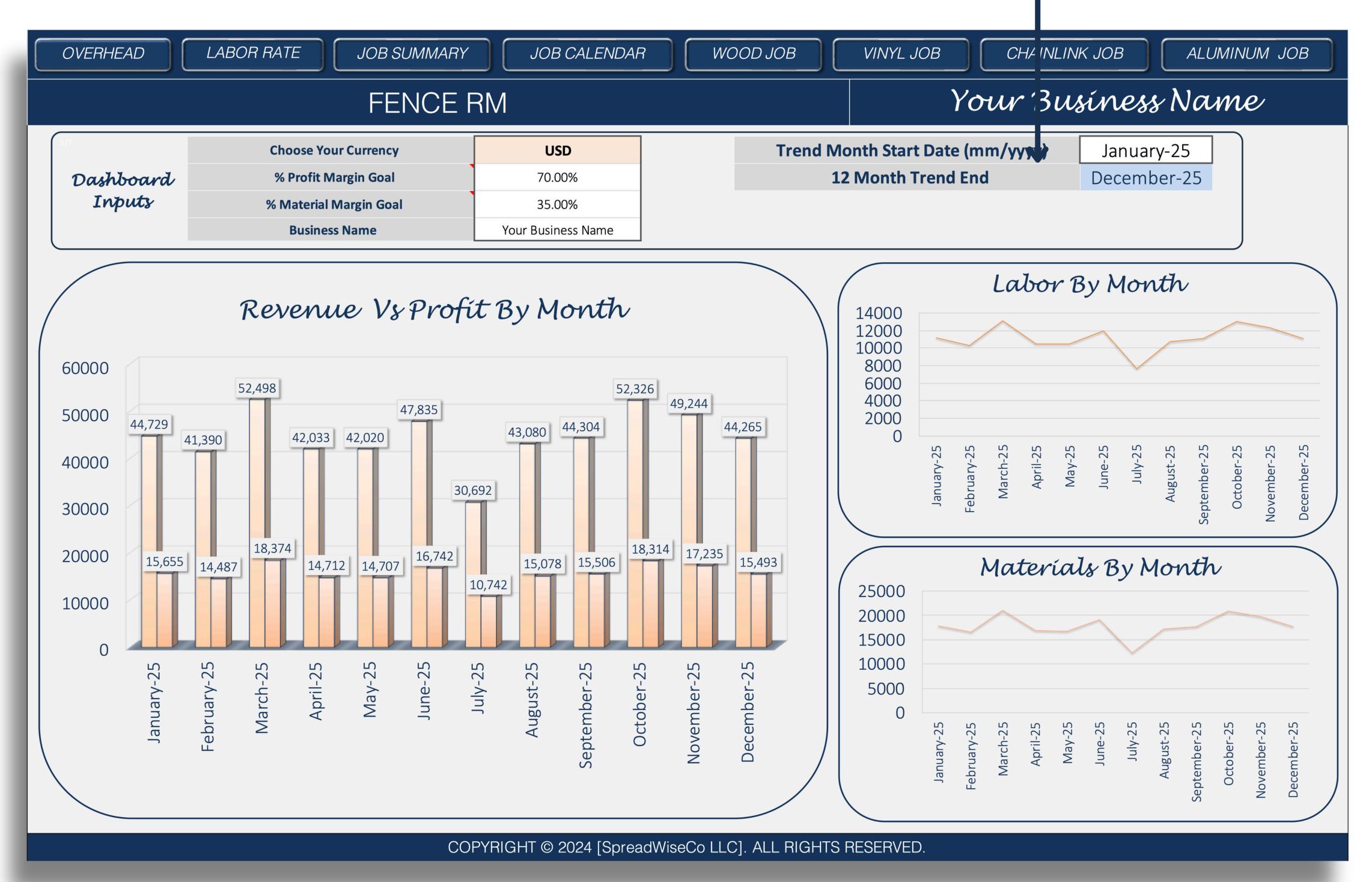
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RECORD YOUR ACTUAL JOB REVENUE AND DELIVERY DATE IN EACH JOB TAB, AND THIS WILL FEED YOUR REVENUE VS PROFIT TRACKING



CUSTOMIZE YOUR DASHBOARD TIME FRAME, & SEE YOUR PERFORMANCE FOR ANY 12 MONTH PERIOD.



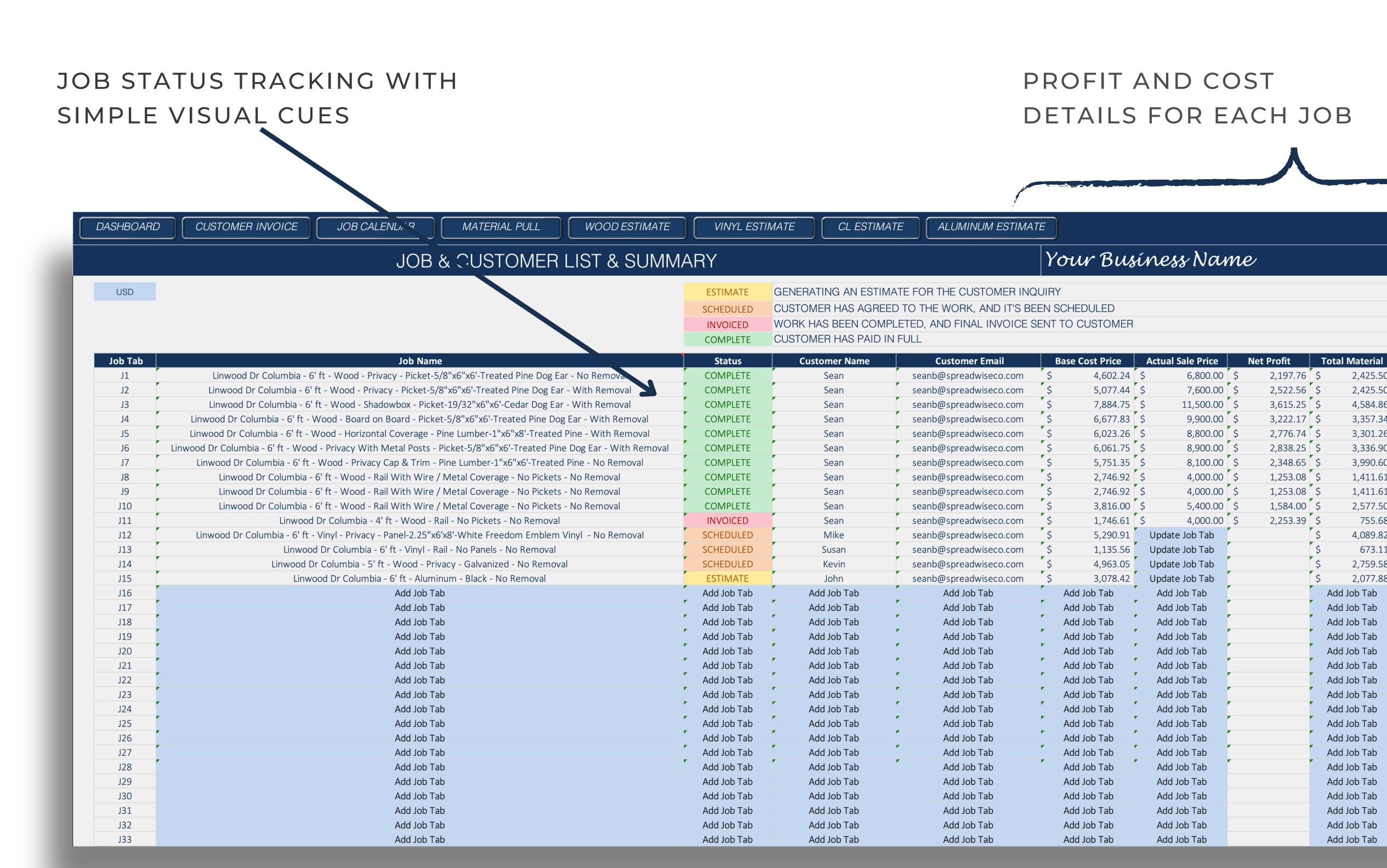
JOB NAMES FOR ALL JOBS IN YOUR WORKBOOK

CUSTOMER INFO FOR QUICK REFERENCE & HISTORY

CUSTOMER INVOICE JOB CALENDAR VINYL ESTIMATE DASHBOARD MATERIAL PULL **WOOD ESTIMATE** CL ESTIMATE ALUMINUM ESTIMATE JOB & CUSTOMER LIST & SUMMARY

JOB TABLE & LIST (READY FOR UP TO 150 JOBS)

USD		ESTIMATE		IATE FOR THE CUSTOMER IN
		SCHEDULED		ED TO THE WORK, AND IT'S E
		INVOICED		PLETED, AND FINAL INVOICE
		COMPLETE	CUSTOMER HAS PAID II	N FULL
Job Tab	Job Name	Status	Customer Name	Customer Email
J1	Linwood Dr Columbia - 6' ft Wood - Privacy - Picket-5/8"x6"x6'-Treated Pine Dog Ear - No Removal	COMPLETE	Sean	seanb@spreadwiseco.com
J2	Linwood Dr Columbia - 6' ft - Mood - Privacy - Picket-5/8"x6"x6'-Treated Pine Dog Ear - With Removal	COMPLETE	Sean	seanb@spreadwiseco.com
J3	Linwood Dr Columbia - 6' ft - Wood - Shadowbox - Picket-19/32"x6"x6'-Cedar Dog Ear - With Removal	COMPLETE	Sean	seanb@spreadwiseco.com
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
J5	Linwood Dr Columbia - 6' ft - Wood - Horizontal Coverage - Pine Lumber-1"x6"x8'-Treated Pine - With Removal	COMPLETE	Sean	seanb@spreadwiseco.com
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
J7	Linwood Dr Columbia - 6' ft - Wood - Privacy Cap & Trim - Pine Lumber-1"x6"x6'-Treated Pine - No Removal	COMPLETE	Sean	seanb@spreadwiseco.com
J8	Linwood Dr Columbia - 6' ft - Wood - Rail With Wire / Metal Coverage - No Pickets - No Removal	COMPLETE	Sean	seanb@spreadwiseco.com
J9	Linwood Dr Columbia - 6' ft - Wood - Rail With Wire / Metal Coverage - No Pickets - No Removal	COMPLETE	Sean	seanb@spreadwiseco.com
J10	Linwood Dr Columbia - 6' ft - Wood - Rail With Wire / Metal Coverage - No Pickets - No Removal	COMPLETE	Sean	seanb@spreadwiseco.com
J11	Linwood Dr Columbia - 4' ft - Wood - Rail - No Pickets - No Removal	INVOICED	Sean	seanb@spreadwiseco.com
J12	Linwood Dr Columbia - 6' ft - Vinyl - Privacy - Panel-2.25"x6'x8'-White Freedom Emblem Vinyl - No Removal	SCHEDULED	Mike	seanb@spreadwiseco.com
J13	Linwood Dr Columbia - 6' ft - Vinyl - Rail - No Panels - No Removal	SCHEDULED	Susan	seanb@spreadwiseco.com
J14	Linwood Dr Columbia - 5' ft - Wood - Privacy - Galvanized - No Removal	SCHEDULED	Kevin	seanb@spreadwiseco.com
J15	Linwood Dr Columbia - 6' ft - Aluminum - Black - No Removal	ESTIMATE	John	seanb@spreadwiseco.com
J16	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab
J17	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab
J18	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab
J19	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab
J20	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab
J21	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab
J22	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab
J23	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab
J24	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab
J25	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab
J26	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab
J27	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab
J28	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab
J29	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab
J30	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab
J31	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab
J32	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab
J33	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab



EACH JOB



BASE COST PRICE: THIS IS THE PRICE THAT WILL COVER ALL BASE OPERATING COSTS - OVERHEAD, MATERIALS, LABOR

**BREAK-EVEN** 



WITH PROFIT MARGIN: THIS IS
THE PRICE THAT COVERS ALL
COSTS, PLUS YOUR PROFIT &
MATERIAL MARGIN GOAL ON

SCALE AND GROW YOUR BUSINESS

Job Pr cing Summary

Base Costs Price \$ 9,173.74

With Profit & Material Margin \$ 12,735.75

Profit Goal % 70.0%

Material Margin % 35.0%

## PRO 48 WHAT'S INCLUDED WITH PURCHASE

#### TABS IN THE WORKBOOK































\*Material Lists & Inventory Trackers for Wood, Vinyl, Chain Link, & Aluminum

\*\*Includes (4) job examples, & (4) Job Tab Templates. By simply making a copy of a tab, you can add up to (150) jobs.



#### GUIDANCE









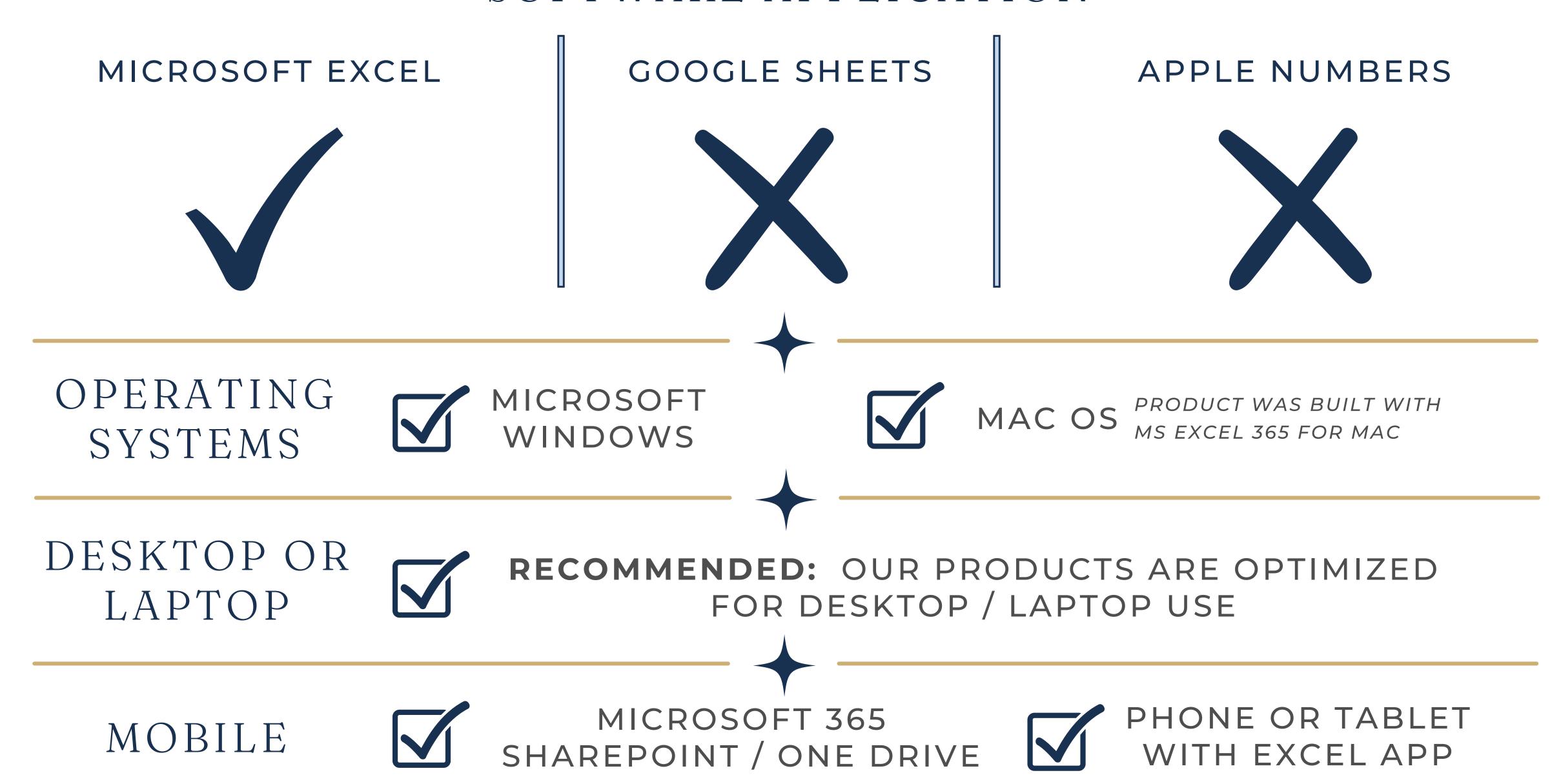
TOOL FLOW CHART





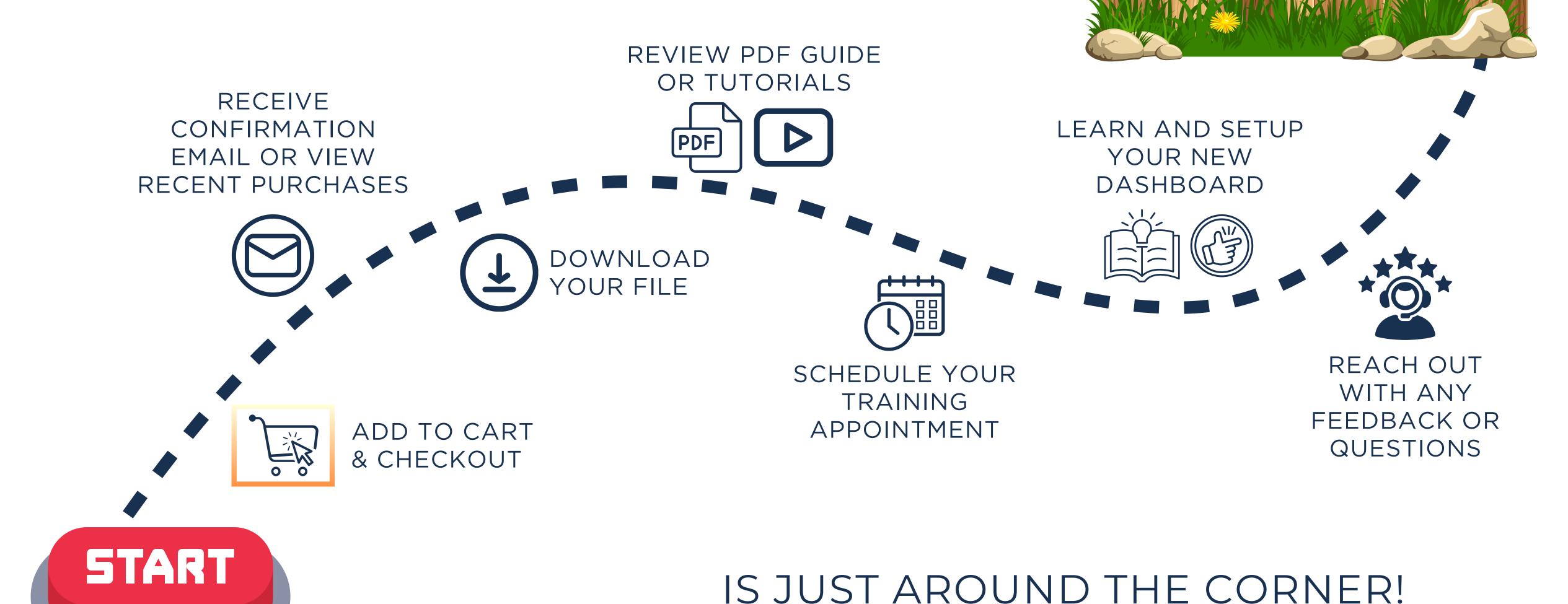
## PRO 49 COMPATIBILITY

#### SOFTWARE APPLICATION

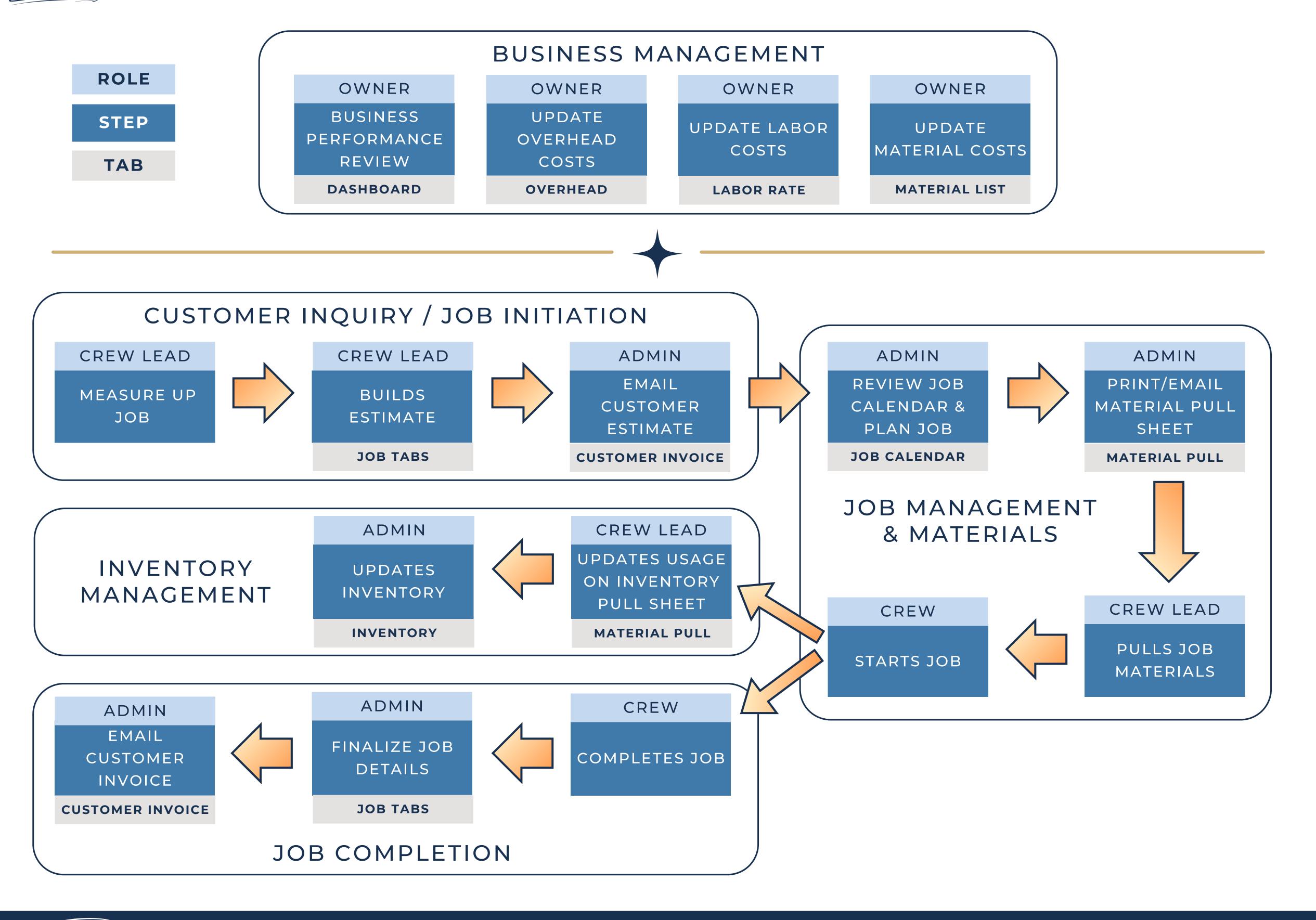


- SOME FONTS MAY SHOW UP DIFFERENTLY
- BUILT IN GUIDE NOTES
  - LOSE SOME OF THEIR FORMATTING THAT HELPS EMPHASIZE KEY POINTS
  - NOTE BOXES MAY LOOK SMALL, AND HARD TO READ WITHOUT ZOOMING IN
- SOME CELL TEXT MAY APPEAR TO NOT FIT THE CELL WIDTH

## THE FENCING JOB & ESTIMATE SOLUTION YOU'VE BEEN LOOKING FOR



## PRO 51 RECOMMENDED WORK FLOW



### PRO 52 HOW THE TOOL WORKS

LABOR OVERHEAD COSTS COSTS PROFIT GOALS PROFIT & REVENUE JOB & JOB TABS DATA REVENUE CUSTOMER (X150)DASHBAORD LIST & CHART TREND SUMMARY **ESTIMATE** DATE FOR DATA DATA FILTER **SELECTION** DUE DATES **ESTIMATE CURRENCY MENU** DATA **SELECTION SELECTION** MATERIAL **SELECTION MENU** DATA **MENU** JOB CUSTOMER CALENDAR INVOICE MATERIAL INVENTORY DATA **ALL TABS** INVENTORY LIST(S) TRACKER(S) (X4)MATERIAL (X4) **SELECTION MENU SELECTION SELECTION MENU** MATERIAL **MENU** PULL LIST SUPPLIERS FOR FINANCIAL ACCESS

VISIBILITY IN JOB TABS

SUPPLIER LIST

LABOR

OVERHEAD



#### NO REFUNDS ON PRO PRODUCTS



OUR PRO SPREADSHEETS ARE EXCLUSIVE TO SPREADWISECO,
& EXTREMELY CAPABLE. DUE TO THE NATURE OF THE
PRODUCT, WE DO **NOT** OFFER REFUNDS ON OUR PRO
SOLUTIONS.



IF YOU PURCHASE A PRO LEVEL SPREADSHEET FROM US, WE WILL DO OUR BEST TO HELP YOU MAKE THE MOST OF THE PRODUCT, INCLUDING A 1 HR 1:1 MS TEAMS TRAINING.



PLEASE VISIT HTTPS://SPREADWISECO.COM, VIEW THE DETAILED PDFS, & REACH OUT TO US WITH QUESTIONS BEFORE PURCHASE TO ENSURE THE PRODUCT IS RIGHT FOR YOU.



## FENCE RM



