



SpreadWiseCo™

*Spreadsheets Reimagined*

# RENTAL DASHBOARD GUIDE

5.3 - 3/26/2025

BUILT WITH  
MICROSOFT  
EXCEL



# PRODUCT FEATURES & LEARNING TIME

## PRODUCT FEATURES

- ✓ WAY TO CAPTURE **RENTAL BUSINESS OVERHEAD COSTS**
- ✓ **NET INCOME** FOR EACH PROPERTY
- ✓ **INSIGHT** TO IMPROVE YOUR **RENTAL RETURNS** AND PERFORMANCE
- ✓ DETAILED RENTAL **INCOME TRACKING** FOR EACH PROPERTY
- ✓ VACANCY & INCOME VS EXPENSES TRENDING ACROSS **ALL PROPERTIES**
- ✓ FOUR INTEGRATED **CURRENCIES** (*USD, EUR, GBP, CAD*)
- ✓ DETAILED **EXPENSE TRACKING** WITH TAX CATEGORY FILTERING
- ✓ **RENTAL HISTORY** & RECORD KEEPING
- ✓ BUILT IN **GUIDE NOTES**
- ✓ **VACANCY %** FOR EACH PROPERTY
- ✓ UP TO **25 RENTALS** IN ONE DASHBOARD



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## 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

# COMPATIBILITY

## SOFTWARE APPLICATION

MICROSOFT EXCEL



GOOGLE SHEETS



APPLE NUMBERS



OPERATING SYSTEMS



MICROSOFT WINDOWS



MAC OS PRODUCT WAS BUILT WITH MS EXCEL 365 FOR MAC

DESKTOP OR LAPTOP



**RECOMMENDED:** OUR PRODUCTS ARE OPTIMIZED FOR DESKTOP / LAPTOP USE

MOBILE USE OF MS EXCEL



MICROSOFT 365 SHAREPOINT / ONE DRIVE



PHONE OR TABLET WITH EXCEL APP

**\*\*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



RENTAL  
TABS

(\*X2)



PERFORMANCE  
DASHBOARD



PDF GUIDE



RENTAL DATA TABLE  
& SUMMARY



DETAILED EXPENSE  
TRACKER



TOOL FLOW CHART



RENTAL OVERHEAD



TAX CATEGORIES

*\*\*Includes (2) Rental tabs. By simply making a copy of the tab, you can add up to (25).*

LEARN MORE



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

*Enjoy Your  
Dashboard!*

# ABOUT THIS GUIDE

## 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.

## YOUTUBE TUTORIALS

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



DOWNLOAD THIS GUIDE ANYTIME AT [HTTPS://SPREADWISE.COM](https://spreadwise.com)

# IN YOUR PRODUCT 'ABOUT' TAB

DSK

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

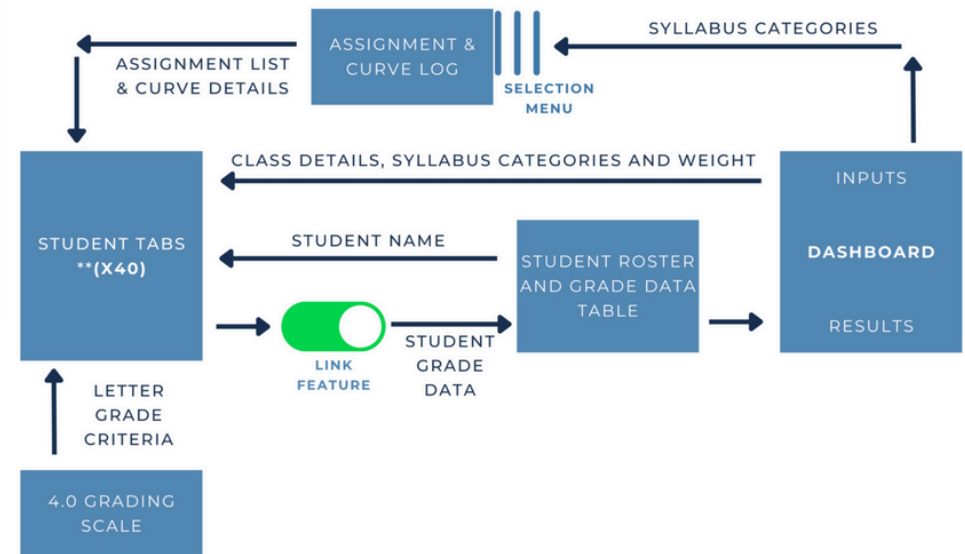
WE PROVIDE A HIGH LEVEL FLOW CHART FOR EVERY TOOL FOR A QUICK REFERENCE OF HOW IT ALL WORKS!

## STUDENT GRADEBOOK AND ASSIGNMENT DASHBOARD

REVISION: 4.5

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

### TOOL FLOW CHART

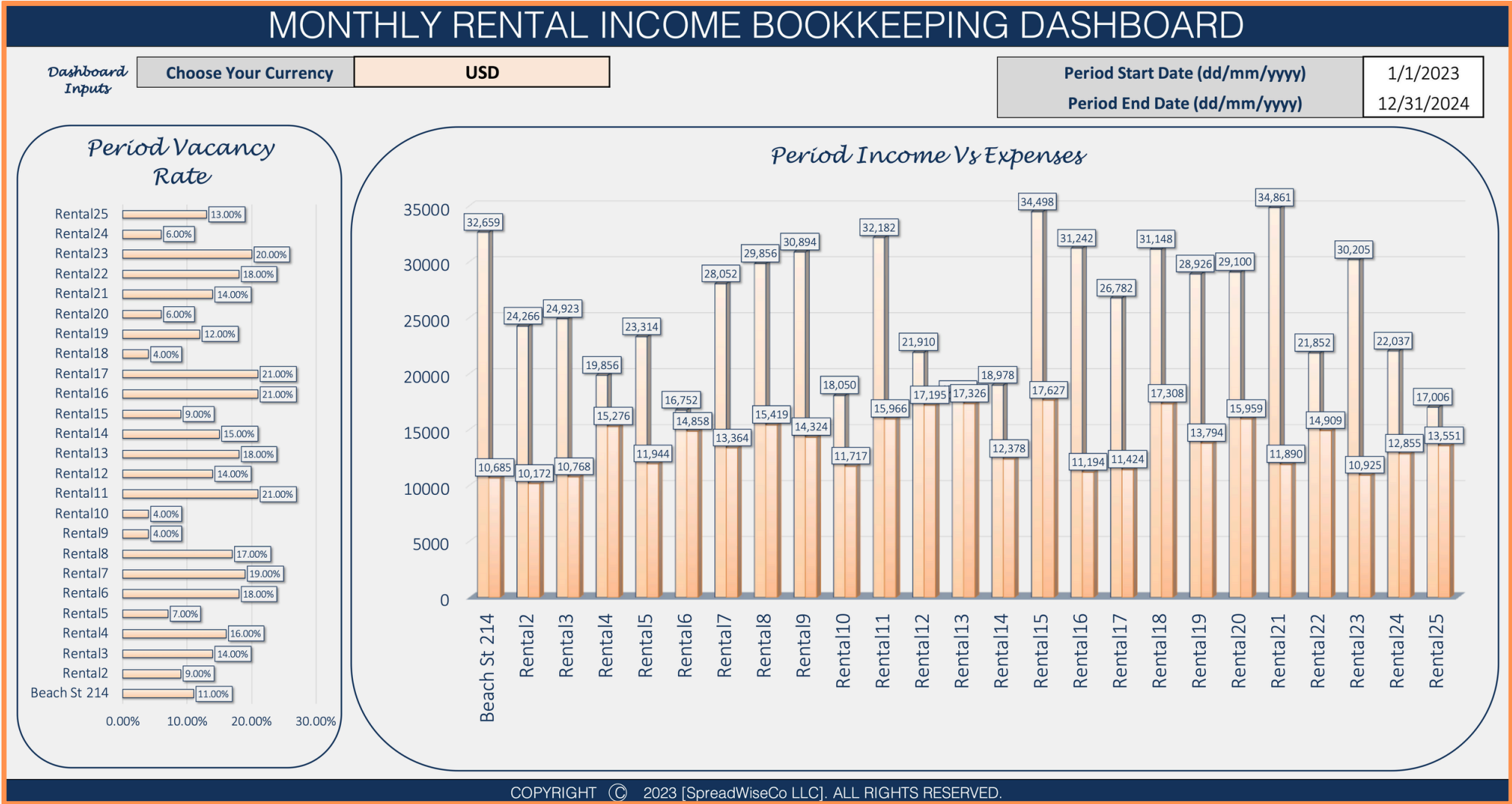


**\*\*DASHBOARD IS PRESET WITH (5) STUDENT TABS. BY SIMPLY MAKING A COPY OF THE TAB, YOU CAN QUICKLY LINK UP TO (40)**

# 1 - GETTING STARTED



THIS JOURNEY BEGINS WITH THE DASHBOARD



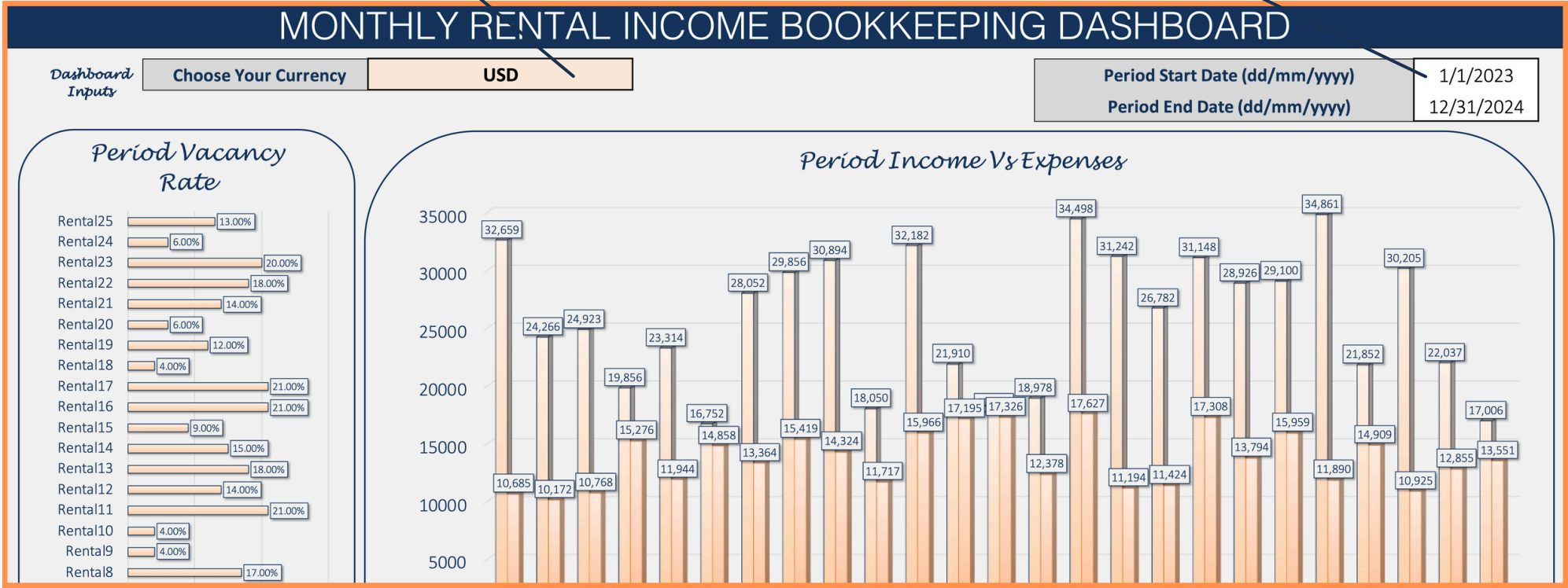


# 2 - DASHBOARD INPUTS



SELECT YOUR CURRENCY  
THIS WILL SET THE CURRENCY FOR THE ENTIRE WORKBOOK

SET YOUR TIME FRAME THAT YOU WANT THE GRAPHS TO DISPLAY. **YOU CAN CHANGE THIS AT ANY TIME**





# 3 - RENTAL OVERHEAD BREAKDOWN



USE THIS TAB TO RECORD OVERHEAD COSTS THAT APPLY TO ALL OF YOUR RENTAL UNITS, BUT ARE PAID AS ONE. \*\*IF YOU RECORD IT HERE, DO NOT RECORD THE SAME EXPENSE ON ANY OF THE INDIVIDUAL RENTAL TABS

### EXAMPLES

- LAWN CARE
- INSURANCE POLICIES
- MAINTENANCE CONTRACTS

LIST YOUR TOTAL # OF RESIDENTIAL RENTALS YOU WANT THE OVERHEAD COSTS TO APPLY TO

AUTOMATIC SPLIT OF OVERHEAD EXPENSES ACROSS YOUR RENTAL UNITS

SHARED RENTAL BUSINESS OVERHEAD							
Total Rental Units		2		USD			
Average Monthly Cost Per Unit		\$ 166.67					
RENTAL OVERHEAD BREAKDOWN							
#	Short Description	Contractor, Vendor, Etc	Tax Category	Paid 'X' Times / Year	Paid Amount	Annualized Cost	Comments
1	Business License		Other	2	\$ 250.00	\$ 500.00	Business Licensing for City
2	Property Maintenance Contract		Other	1	\$ 1,000.00	\$ 1,000.00	
3	Lawn Care Service	Palmetto Lawn	Other	1	\$ 1,500.00	\$ 1,500.00	Annual contract Fee
4	LLC		Legal / Professional	1	\$ 1,000.00	\$ 1,000.00	Annual Service
5						\$ -	
6						\$ -	
7						\$ -	
8						\$ -	
9						\$ -	
10						\$ -	
11						\$ -	
12						\$ -	
13						\$ -	
14						\$ -	
15						\$ -	
16						\$ -	
17						\$ -	
18						\$ -	
19						\$ -	
20						\$ -	

# 4 - RENTAL TAB SETUP

- SET YOUR PROPERTY NAME
- MONTHLY RENT TARGET
- RENTAL SQUARE FEET

- FINANCING DETAILS
  - IF NOT FINANCED, SET LOAN AMOUNT TO \$0

ANNUAL PROPERTY TAXES & INSURANCE

Rental Name	
Monthly Rent Amount	\$ 2,200.00
Rental Square Feet	1690

Current Rental Financing	
Original Loan Amount	\$ 200,000.00
Interest Rate	5.00%
Loan Term (Months)	360

Current Property Taxes & Insurance	
**Annual Taxes	\$ 2,500.00
**Annual Insurance	\$ 1,100.00

Rental Property Valuation	
Property Balance	\$ 100,000.00
Property Value	\$ 250,000.00
Current Rent / Sq Ft	\$ 1.30
Current Equity	\$ 150,000

- PRINCIPAL LOAN BALANCE
- CURRENT MARKET VALUE

# 6 - RENTAL TAB - RENTAL INCOME & FEES



SET THE MONTH TO START TRACKING RENTAL INCOME

MONTHLY RENTAL INCOME  
\*FOR SOME RENTAL TYPES, YOU MAY HAVE A SECONDARY INCOME SOURCE, SUCH AS GOVERNMENT ASSISTANCE

RENTAL PAID STATUS

MONTHLY FEE REVENUE

MONTHLY INCOME & EXPENSE TRACKING								
#	Month - Year	Income Source 1	Income Source 2	Paid Status	Fees Charged	Vacant? (Yes/No)	Total Expenses	Comments
1	August-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
2	September-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
3	October-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
4	November-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
5	December-23	\$ -	\$ -		\$ -	Yes	\$ 1,540.00	
6	January-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
7	February-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 4,040.00	
8	March-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
9	April-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
10	May-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
11	June-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
12	July-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
13	August-24	\$ -	\$ -		\$ -	Yes	\$ 1,540.00	
14	September-24	\$ -	\$ -		\$ -	Yes	\$ 1,540.00	
15	October-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
16	November-24	\$ 2,200.00	\$ -	Paid In Full	\$ 25.00	No	\$ 1,540.00	Late Fee
17	December-24	\$ 2,200.00	\$ -	Paid In Full	\$ 128.00	No	\$ 1,540.00	Pet Fee
18	January-25							
19	February-25							
20	March-25							
21	April-25							
22	May-25							

# 7 - RENTAL TAB - VACANCY



IF THE RENTAL WAS VACANT FOR THAT SET TO **YES**.  
OTHERWISE, SET TO **NO**.

MONTHLY INCOME & EXPENSE TRACKING								
#	Month - Year	Income Source 1	Income Source 2	Paid Status	Fees Charged	Vacant? (Yes/No)	Total Expenses	Comments
1	August-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
2	September-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
3	October-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
4	November-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
5	December-23	\$ -	\$ -		\$ -	Yes	\$ 1,540.00	
6	January-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
7	February-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 4,040.00	
8	March-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
9	April-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
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12	July-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
13	August-24	\$ -	\$ -		\$ -	Yes	\$ 1,540.00	
14	September-24	\$ -	\$ -		\$ -	Yes	\$ 1,540.00	
15	October-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
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17	December-24	\$ 2,200.00	\$ -	Paid In Full	\$ 128.00	No	\$ 1,540.00	Pet Fee
18	January-25							
19	February-25							
20	March-25							
21	April-25							
22	May-25							

# 8 - DETAILED EXPENSE TRACKER



USE THIS TABLE TO RECORD ANY UNPLANNED OR MISCELLANEOUS EXPENSES FOR EACH RENTAL PROPERTY

USE THE DROP DOWN MENU TO SELECT THE TAX CATEGORY FOR THE EXPENSE ITEM

DETAILED EXPENSE LOG									Property Total	\$ 2,500.00
#	Property	Date (mm/dd/yyyy)	Short Description	Contractor, Vendor, Etc	Tax Category	Total Cost	Receipt Filed	Comments	Tax Categories	Tax Category Total
1	214 Beach Street	2/1/24	Refridgerator	Lowes	Office Expenses	\$ 2,500.00	Yes		Vehicle	\$ -
2									Home Office	\$ -
3									Communications	\$ -
4									Supplies	\$ -
5									Office Expenses	\$ 2,500.00
6									Startup Costs	\$ -
7									Assets	\$ -
8									Advertising	\$ -
9									Legal / Professional	\$ -
10									Other	\$ -
11										\$ -
12										\$ -
13										\$ -
14										\$ -

# 9 - DETAILED EXPENSE TRACKER



TAX FILTER RESULTS

USE THE DATES AND FILTER TO REVIEW YOUR EXPENSE BREAKDOWN BY TAX CATEGORY

## DETAILED EXPENSE TRACKING

USD

*Expenses By Tax Category*

Tax Category	Amount (USD)
Vehicle	0
Home Office	0
Communications	0
Supplies	0
Office Expenses	2500
Startup Costs	0
Assets	0
Advertising	0
Legal / Professional	0
Other	0

Tax Filter Start
1/1/2024
Tax Filter End
12/31/2024
Property Filter
214 Beach Street

DETAILED EXPENSE LOG								
#	Property	Date (mm/dd/yyyy)	Short Description	Contractor, Vendor, Etc	Tax Category	Total Cost	Receipt Filed	Comments
1	214 Beach Street	2/1/24	Refridgerator	Lowes	Office Expenses	\$ 2,500.00	Yes	
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								

Property Total	\$	2,500.00
Tax Categories	Tax Category Total	
Vehicle	\$	-
Home Office	\$	-
Communications	\$	-
Supplies	\$	-
Office Expenses	\$	2,500.00
Startup Costs	\$	-
Assets	\$	-
Advertising	\$	-
Legal / Professional	\$	-
Other	\$	-
	\$	-
	\$	-
	\$	-
	\$	-
	\$	-



# 10 - RENTAL TAB - MONTHLY EXPENSES



ON EACH RENTAL TAB, YOU'LL GET A FINANCING, TAX, & OH SUMMARY. USE THIS, ALONG WITH YOUR DETAILED EXPENSE TRACKING TO POPULATE YOUR TOTAL EXPENSES BY MONTH FOR EACH RENTAL

<b>Monthly Financing</b>	\$	<b>1,074</b>
<b>Monthly Tax &amp; Insurance</b>	\$	<b>300</b>
<b>Monthly Overhead</b>	\$	<b>167</b>

MONTHLY EXPENSE TRACKING

MONTHLY INCOME & EXPENSE TRACKING								
#	Month - Year	Income Source 1	Income Source 2	Paid Status	Fees Charged	Vacant? (Yes/No)	Total Expenses	Comments
1	August-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
2	September-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
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4	November-23	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
5	December-23	\$ -	\$ -		\$ -	Yes	\$ 1,540.00	
6	January-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
7	February-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 4,040.00	
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10	May-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
11	June-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
12	July-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
13	August-24	\$ -	\$ -		\$ -	Yes	\$ 1,540.00	
14	September-24	\$ -	\$ -		\$ -	Yes	\$ 1,540.00	
15	October-24	\$ 2,200.00	\$ -	Paid In Full	\$ -	No	\$ 1,540.00	
16	November-24	\$ 2,200.00	\$ -	Paid In Full	\$ 25.00	No	\$ 1,540.00	Late Fee
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18	January-25							
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22	May-25							



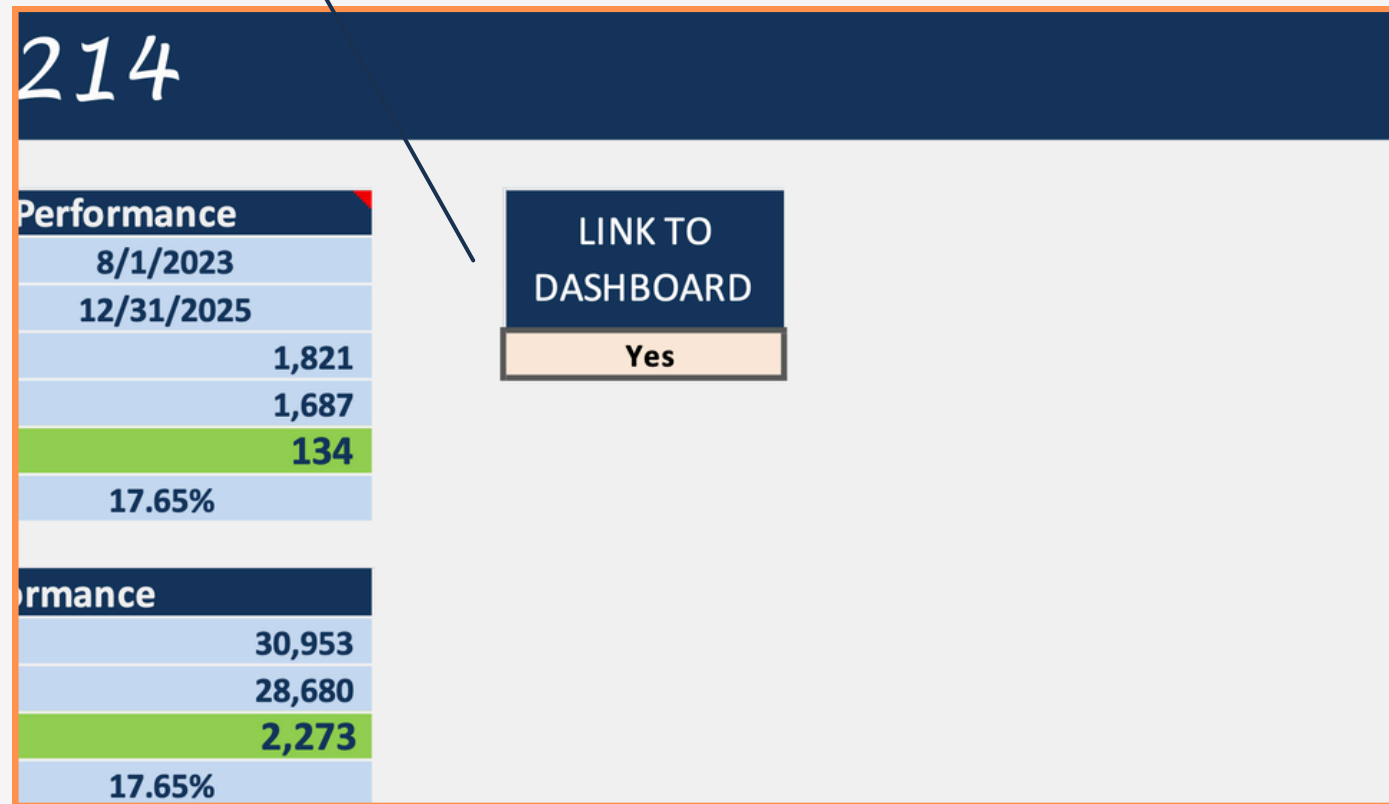
YOU'LL GET TWO PERFORMANCE BREAKDOWN TABLES

- 1.) PERFORMANCE BASED ON YOUR DASHBOARD TIME PERIOD SELECTION
- 2.) PERFORMANCE FOR ALL TIME

PROFIT VALUES WILL EITHER BE GREEN OR RED, DEPENDING ON OVERALL PERFORMANCE.

Avg Time-Period Performance		
Start	8/1/2023	
End	12/31/2025	
Avg Monthly Income	\$	1,821
Avg Monthly Expenses	\$	1,687
Net Monthly Profit	\$	134
Average Vacancy Rate	17.65%	
All Time Performance		
Income	\$	30,953
Expenses	\$	28,680
Net Profit	\$	2,273
Vacancy	17.65%	

THIS LINK BUTTON IS WHAT TIES THE RENTAL TAB DATA TO YOUR OVERALL DASHBOARD. OUR DASHBOARD SUPPORTS 25 RENTALS LINKED AT ANY GIVEN TIME. **HOWEVER, YOU CAN HAVE MANY MORE RENTAL TABS THAN 25...**

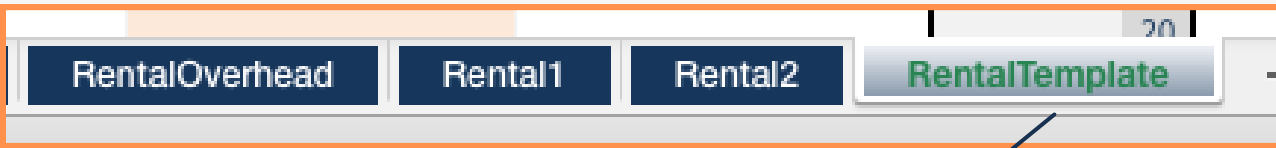


The screenshot shows a dashboard interface with a dark blue header containing the number '214'. Below the header, there are two performance tables. The first table is titled 'Performance' and has columns for dates (8/1/2023, 12/31/2025) and values (1,821, 1,687, 134, 17.65%). The second table is partially visible, titled 'Performance', and has values (30,953, 28,680, 2,273, 17.65%). To the right of the tables is a dark blue button labeled 'LINK TO DASHBOARD' with a light orange 'Yes' button below it. A line connects the text box above to the 'LINK TO DASHBOARD' button.

Performance	
8/1/2023	1,821
12/31/2025	1,687
	134
	17.65%

Performance	
	30,953
	28,680
	2,273
	17.65%

# 13 - ADDING RENTAL TABS

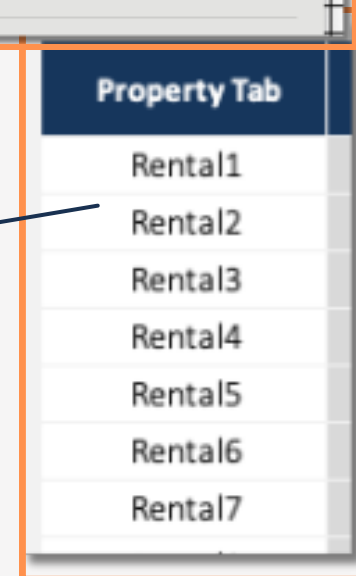
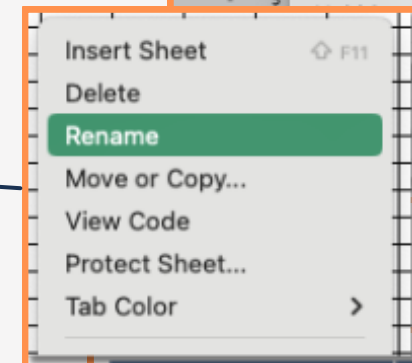
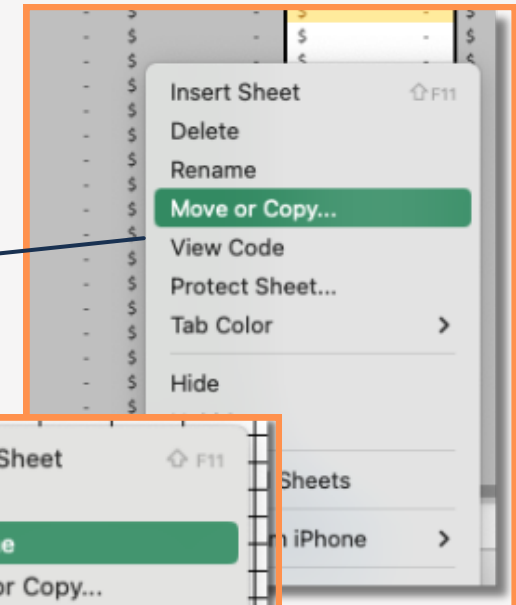


1.) RIGHT CLICK ON THE TEMPLATE & MAKE A COPY, OR HOWEVER MANY COPIES YOU NEED.

2.) RIGHT CLICK ON THE NEW TAB TO CHANGE THE NAME OF THE TAB.

3.) SET THE TAB NAME TO MATCH THE NEXT SEQUENTIAL PROPERTY TAB NUMBER FROM THE DASHBOARD EXACTLY.

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



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