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## PRODUCT FEATURES

#### SUPPORTS 100 JOBS IN ONE DASHBOARD



- COMPLETE JOB COST
  MANAGEMENT SYSTEM
- AUTOMATED JOB
  PLANNING CALENDAR

12-MONTH BUSINESS
PERFORMANCE METRICS

- AUTOMATED HOURLY
  LABOR RATE CALCULATION
- PROFESSIONAL CUSTOMER
  ESTIMATES & INVOICES
- PROFIT OPTIMIZATION &
  BUSINESS GROWTH TOOLS

COMPREHENSIVE JOB
STATUS & WORKFLOW
TRACKING



BUILT IN GUIDANCE NOTES

FOUR INTEGRATED
CURRENCIES (USD, EUR,
GBP, CAD)



## LEARNING CURVE & GUARANTEE

#### LEARNING CURVE

THIS DASHBOARD'S ESTIMATED LEARNING CURVE & SETUP TIME





#### TOOLS TO HELP



INTERACTIVE PDF
INSTRUCTION GUIDE





DETAILED PRODUCT
TUTORIALS





MICRO-TUTORIALS FOR STANDARD FEATURES AND FUNCTIONS





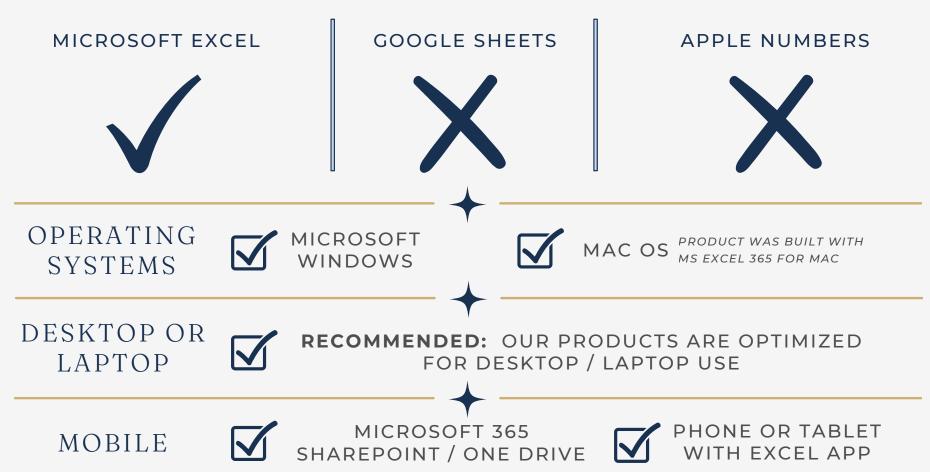
#### **OUR GUARANTEE**





### 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



# FILES & TABS

MS EXCEL FILES PRODUCT PDF GUIDE WORKBOOK JOB TABS (\*X2) SUPPLIER LIST WORKBOOK TABS **AUTOMATED ESTIMATE &** MATERIAL LIST INVOICE HOURLY LABOR RATE AUTOMATED CALENDAR \*\*Includes (2) job tabs. By simply making a copy of the tab, you **BUSINESS OVERHEAD** PERFORMANCE DASHBOARD can add up to (100).

JOB & CUSTOMER LIST

SUMMARY

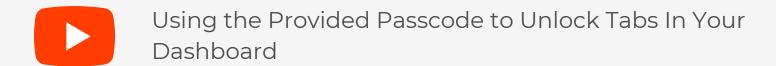
Enjoy Your Pashboard!



### SPREADWISECO LEARN

## MICRO TUTORIALS FOR FAQ

#### CLICK THE LOGOS TO WATCH OUR SHORT TUTORIALS



Edit Your Tab Names Without Impacting Workbook Function

Correcting "####" & Other Text Visibility With Column Width Adjustments

Adding Tabs That Will Link to Your Data Table & Dashboard

Using the Signature Link Feature to Link & Unlink Tabs In Your Workbook





## QUICK NOTES ABOUT THIS GUIDE

#### **GUIDE TEXT BOXES**

#### FOR THOSE READY TO JUMP IN QUICKLY



NICE TO KNOW

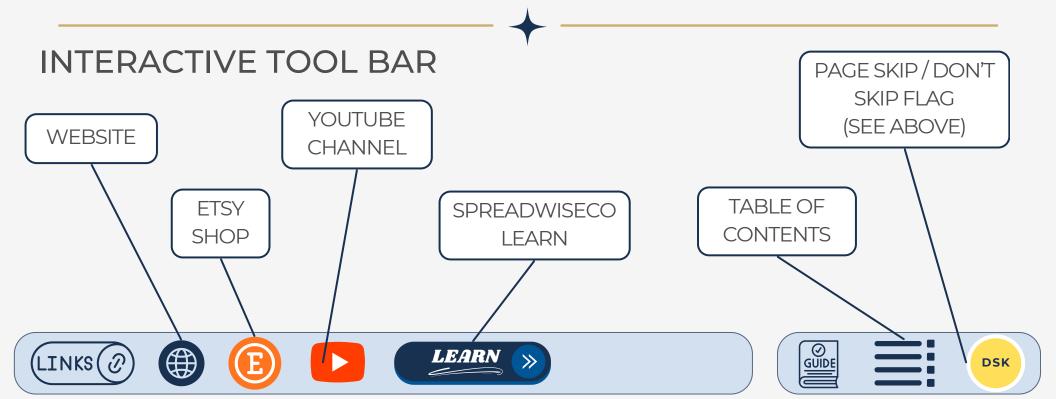




DON'T SKIP!

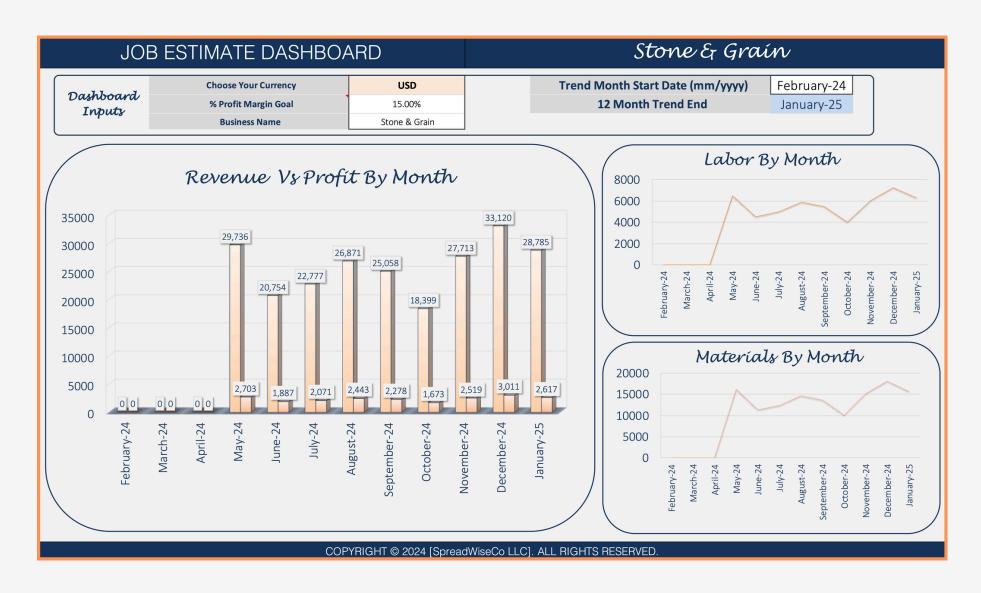


- THE FILE PASSWORD IS INCLUDED IN THE FIRST TAB OF YOUR WORKBOOK.
- USE WITH DISCRETION. FORMULAS AND SETUPS CAN BE EXTREMELY COMPLEX, EVEN FOR THE MOST SAVVY SPREADSHEET USERS.



# GETTING STARTED

THIS JOURNEY BEGINS WITH THE DASHBOARD



















### 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



















## **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.

## BUSINESS VENDOR & SUPPLIER LIS

This list becomes a drop down selection within the job

COMPANY NAME

ADDRESS

PROFESSION / SUPPLIER TYPE

PRIM

Jefferson's Lumber

Lowes

Granite Shop

JOB	NAME				
Job Status	COMPLETE				
Customer Name	Sean				
Customer Address	South Card				
Job P	rice Summary				
Base Costs Price	\$ 1,				
With Profit Margin	\$ 1,				
Profit Goal %					
Tiı	me & Labor				
Hourly Labor Rate	\$				
Hours Required	8.00				
Labor Total	\$				
Material Markup %	15.0%				
	Job				
Supplier	ltem				
Jefferson's Lumber	Plywood - White Birch				
Lowes Lowes	Stain Polyeurethane				
Lowes	Polyeurethane				

















### MATERIAL LIST SUMMARY

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	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					\$ -	









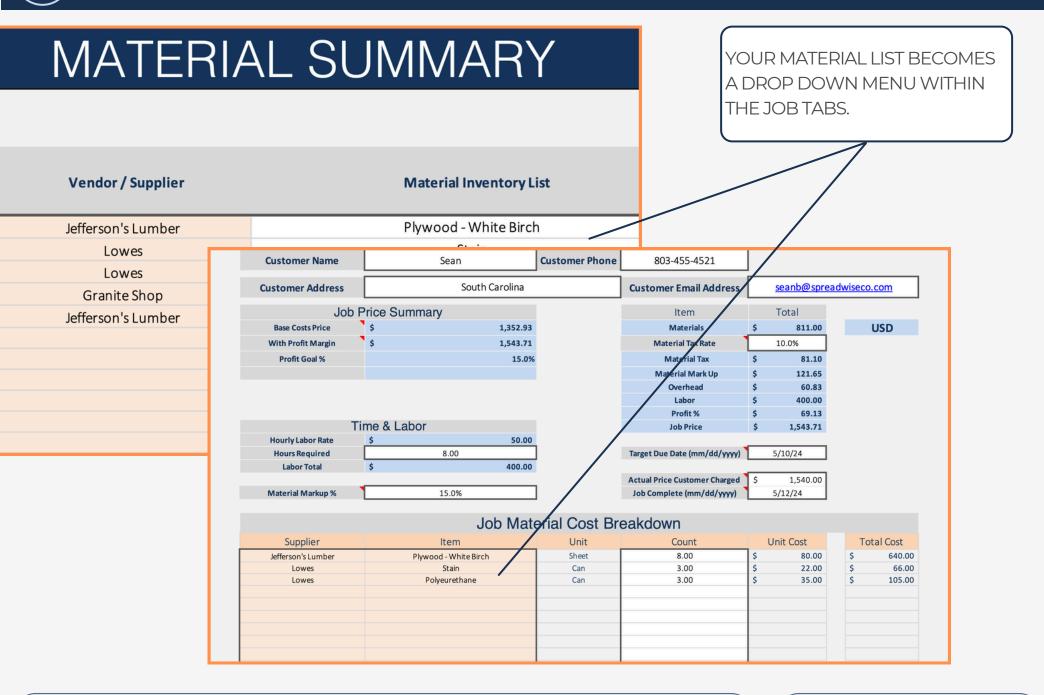








# MATERIAL LIST SUMMARY - CONTINUED



















### **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 60.83 **USD** Overhead Allocation Per Job **BUSINESS OVERHEAD BREAKDØWN** Paid "X" Times / Paid Amount Item **Annualized** Yr \$ 85.00 \$ **Shop Electricity** 1,020.00 12 Tools & Equipment \$ 150.00 12 1,800.00 **Business Licensing** 2 \$ 50.00 100.00

















### 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
I	/			
Role, Job	Hourly Rate		Annual Hours	 Annualized Cost
Installer	\$ 1	21.00	1900	\$ 39,900.00
Shop Manager	\$	27.00	1900	\$ 51,300.00
	\$	-		\$
	\$	-		\$
	\$	-		\$
	\$	-		\$ -
	\$	-		\$
	\$	-		\$
	\$	-		\$ -

















## 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.) SETTHEJOBNAME

JOB	NAME	Large Gravite Table				
Job Status	COMPLETE	Job Name	Large Granite	ole		
Customer Name	Sean	Customer Phone	803-455-4521			
Customer Address	South Carolina		Customer Email Address		seanb@spre	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	
т:	ma <sup>8</sup> Labar		Profit %	\$	69.13	
Hourly Labor Rate	me & Labor 50.00		Job Price	\$	1,543.71	
Hours Required	8.00	1	Target Due Date (mm/dd/yyyy)		5/10/24	
Labor Total	\$ 400.00		0 - 22 - 22 - 22 - 24 - 24 - 24 - 24 - 2			
			Actual Price Customer Charged	\$	1,540.00	
Material Markup %	15.0%		Job Complete (mm/dd/yyyy)		5/12/24	







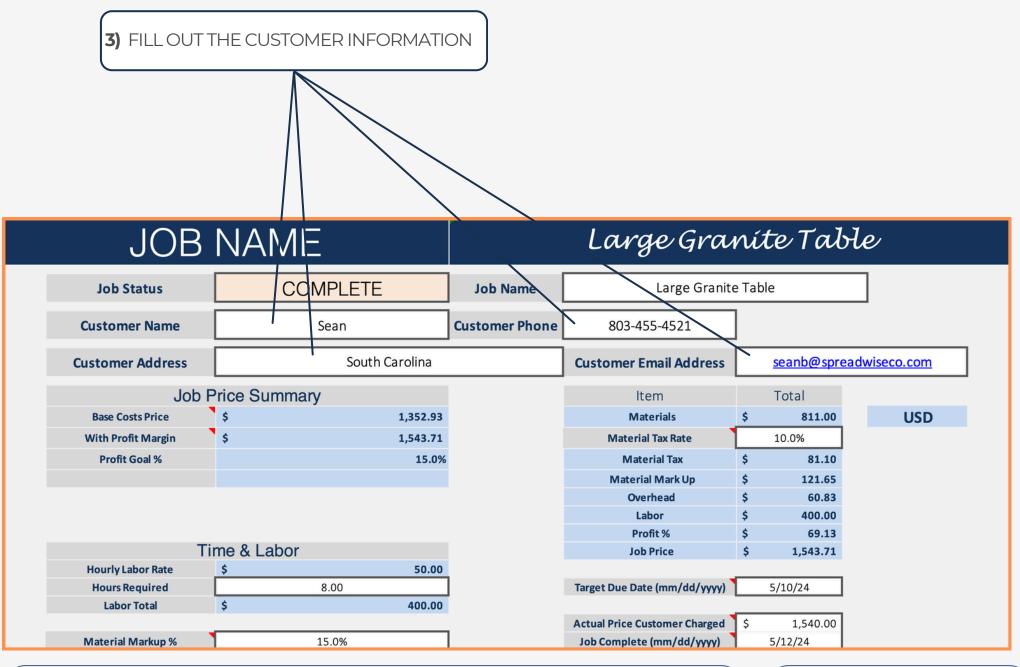
























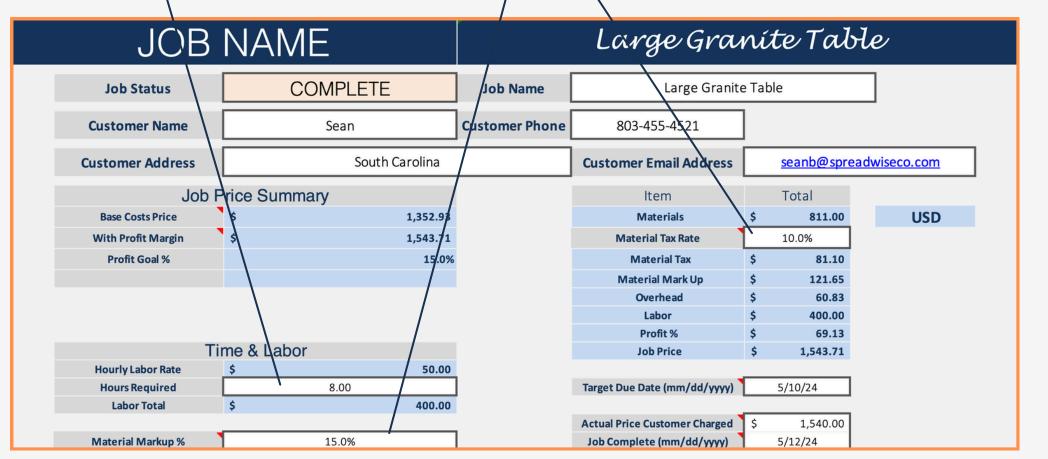




**4.)** LIST THE TOTAL ESTIMATED MAN HOURS NEEDED TO COMPLETE THE JOB

#### **EXAMPLE:**

4 PEOPLE X 4 HRS = 16 MAN HOURS. **5.)** ADD IN YOUR MATERIAL MARKUP & MATERIAL TAX RATE









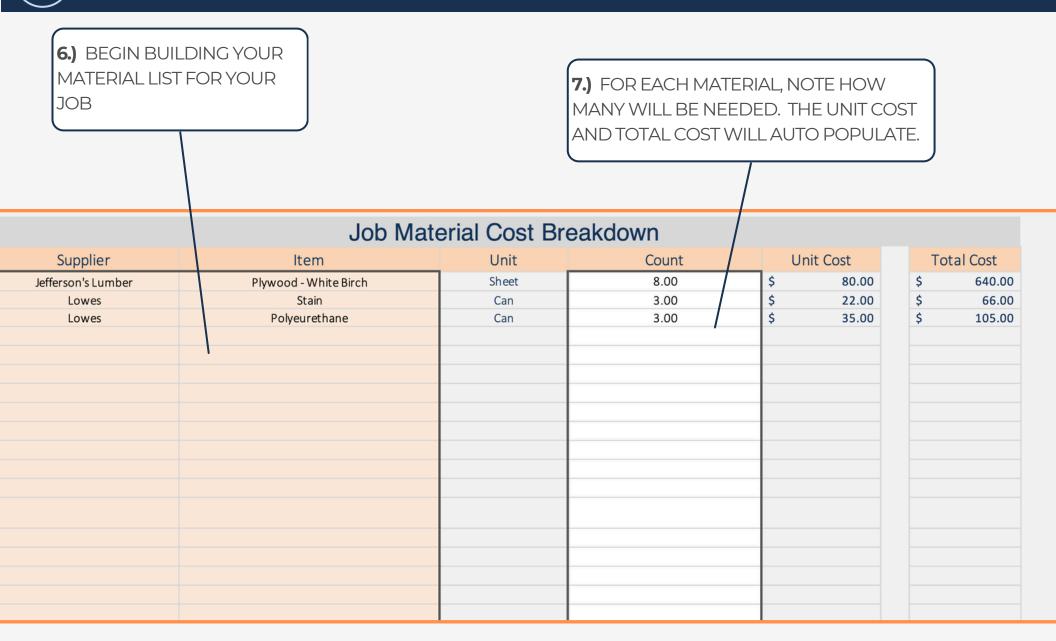
























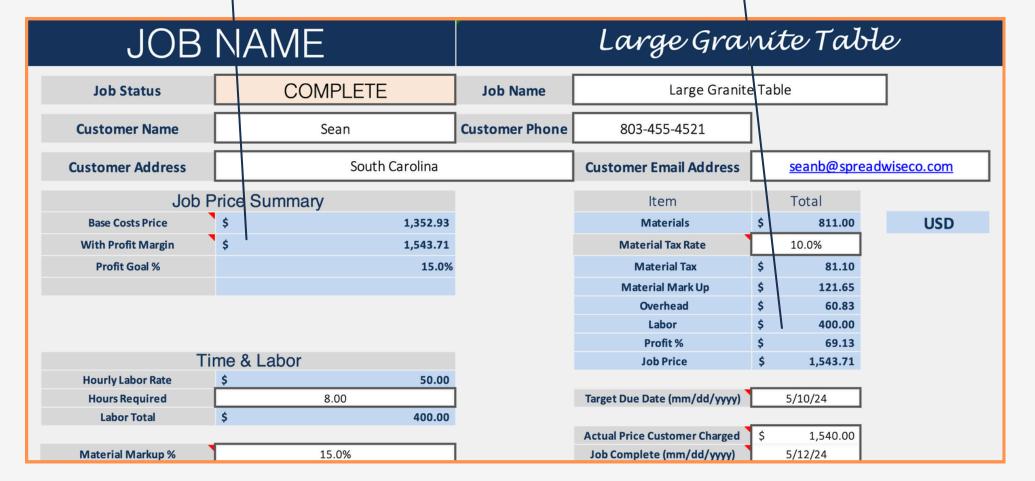




#### YOU'LL BE PROVIDED TWO PRICES.

- 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.

















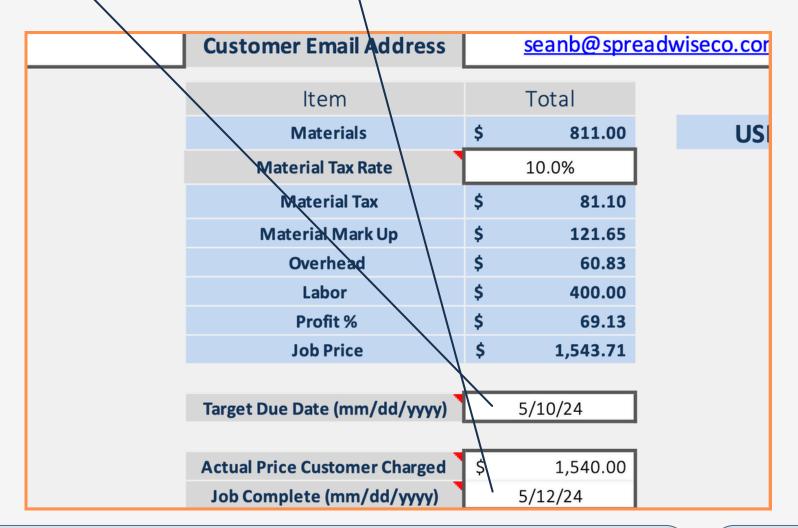


8.) WHEN YOU'RE READY TO SCHEDULE THE JOB, ADD IN THE DUE DATE, AND UPDATE THE STATUS TO "SCHEDULED"

**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.













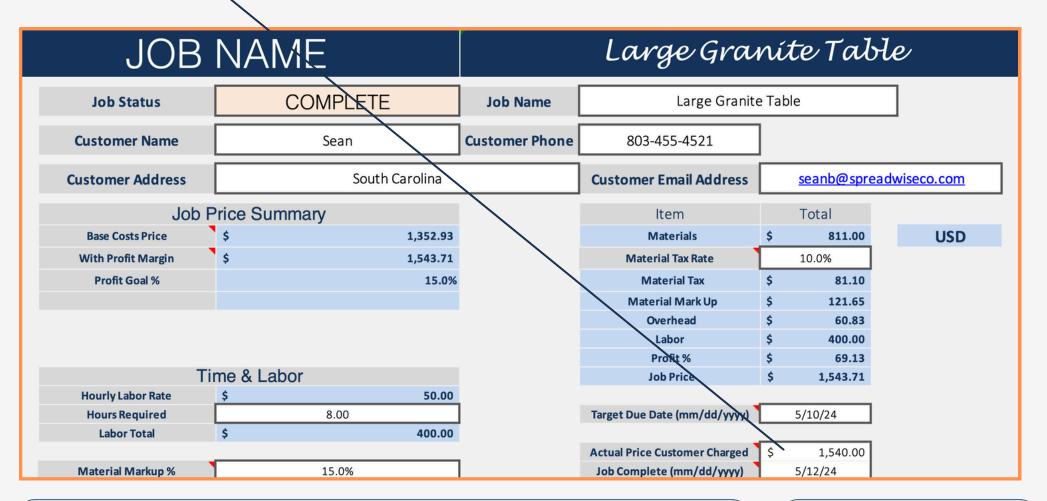






11.) ONCE THE CUSTOMER HAS BEEN INVOICED, UPDATE THE ACTUAL PRICE THE CUSTOMER WAS CHARGED

- 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



















# 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

#### Large Granite Table **ESTIMATE USD** Materials & Labor 10.00% Discount J1 1,389.34 **Large Granite Table** Date Completed Customer Estimate Only THE JOB TABS ARE FOR YOU. 803-455-4521 Sean South Carolina seanb@spreadwiseco.com THIS IS THE TAB TO SHARE WITH Count YOUR CUSTOMER. Plywood - White Birch 3.00 Polyeurethane Stone & Grain COPYRIGHT © 2024 [SpreadWiseCo LLC]. ALL RIGHTS RESERVED.

















### **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

#### JOB & CUSTOMER LIST SUMMARY

COMPLETE

Stone & Grain

USD

ESTIMATE GENERATING AN ESTIMATE FOR THE CUSTOMER INQUIRY
CUSTOMER HAS AGREED TO THE WORK, AND IT'S BEEN SCHEDULED

SCHEDULED CUSTOMER HAS AGREED TO THE WORK, AND IT'S BEEN SCHEDULED WORK HAS BEEN COMPLETED, AND FINAL INVOICE SENT TO CUSTOMER

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
J4	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab
J5	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab
J6	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab
J7	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab
J8	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab
J9	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab
J10	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab
J11	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab
J12	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab
J13	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab
J14	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab
J15	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab
J16	Add Job Tab	Add Job Tab	Add Job Tab	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	Add Job Tab	Add Job Tab		Add Job Tab
J18	Add Job Tab	Add Job Tab	Add Job Tab	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	Add Job Tab	Add Job Tab		Add Job Tab
J20	Add Job Tab	Add Job Tab	Add Job Tab	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	Add Job Tab	Add Job Tab		Add Job Tab
J22	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab	Add Job Tab		Add Job Tab

















## REVENUE DASHBOARD

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

#### JOB ESTIMATE DASHBOARD Stone & Grain Trend Month Start Date (mm/yyyy) USD February-24 **Choose Your Currency** Dashboard 15.00% 12 Month Trend End % Profit Margin Goal January-25 Inputs **Business Name** Stone & Grain Labor By Month Revenue Vs Profit By Month 8000 6000







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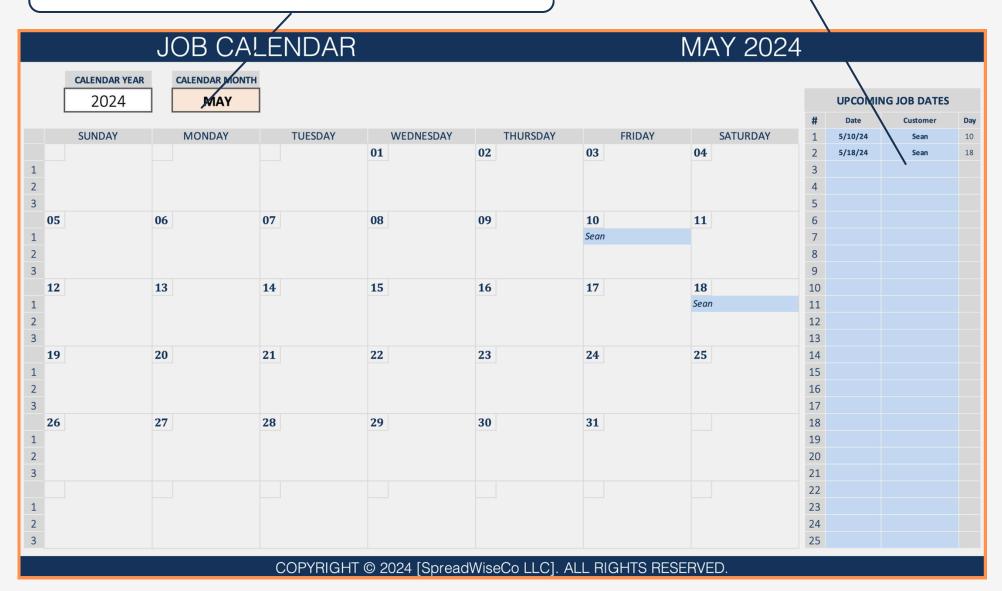


## JOB CALENDAR

• 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











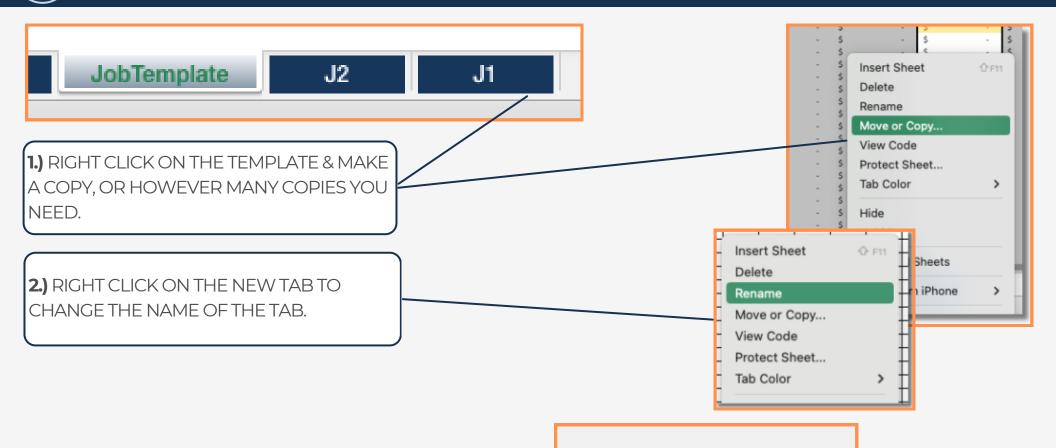








## **ADDING JOB TABS**



- **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

Jo	bTab	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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