



SpreadWiseCoTM

Spreadsheets Reimagined

REALTOR DASHBOARD GUIDE

5.0 - 8/31/2025

BUILT WITH
MICROSOFT
EXCEL



PRODUCT FEATURES & LEARNING TIME

PRODUCT FEATURES

SUPPORTS 25+ PROPERTIES IN ONE DASHBOARD

- ✓ COMPREHENSIVE PROPERTY EXPENSE TRACKING
- ✓ AUTOMATED HOME SALES & COMMISSIONS TRACKING
- ✓ PROFESSIONAL SELLER OFFER REVIEW SYSTEM
- ✓ BUILT-IN MARKET PREPARATION TO-DO LIST
- ✓ COMPREHENSIVE SALES & COMMISSIONS METRICS & ANALYTICS
- ✓ STREAMLINED TAX PREPARATION & REPORTING
- ✓ SIGNATURE PROPERTY LINKING FEATURE FOR SCALABILITY
- ✓ BUILT IN **GUIDANCE NOTES**
- ✓ FOUR INTEGRATED CURRENCIES (**USD, EUR, GBP, CAD**)



DASHBOARD LEARNING & SETUP CURVE

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



PRODUCT COMPATIBILITY

SOFTWARE APPLICATION

MICROSOFT EXCEL



GOOGLE SHEETS



APPLE NUMBERS



OPERATING
SYSTEMS



MICROSOFT
WINDOWS



MAC OS

*PRODUCT WAS BUILT WITH
MS EXCEL 365 FOR MAC*

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



PROPERTY
TABS **(*X3)**



SELLER OFFER
REVIEW



PDF GUIDE



PROPERTY DATA
TABLE & SUMMARY



PERFORMANCE
DASHBOARD



MARKET PREP / TO-
DO LIST

***Includes **(3)** Property 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://SPREADWISE.CO](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://SPREADWISECO.COM](https://spreadwise.co.com)

FREQUENTLY ASKED QUESTIONS

YOUTUBE TUTORIALS

CLICK THE LOGO TO WATCH OUR SHORT TUTORIALS



Using the Provided Passcode to Unlock Tabs In Your Dashboard



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

IN YOUR PRODUCT 'ABOUT' TAB

DSK

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

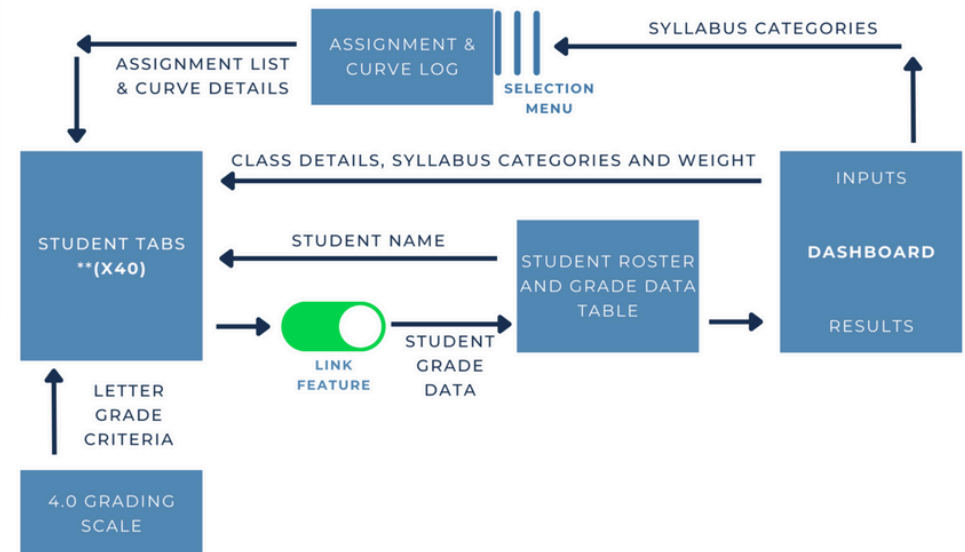
WE PROVIDE A HIGH LEVEL FLOW CHART FOR EVERY TOOL FOR A QUICK REFERENCE OF HOW IT ALL WORKS!

STUDENT GRADEBOOK AND ASSIGNMENT DASHBOARD

REVISION: 4.5

1	Password	Tabs are locked to prevent accidental errors to formulas: Password Key: "swc"
2	Tool Inputs	Your Inputs are the White Boxes With A Border!
3	Tool Inputs	Peach boxes are drop down menus
4	PDF Guide	**Use the downloaded guides to help you through the tool. You can Also visit our website anytime to view & download the
5	Site Link	https://spreadwiseco.com/
6	Google Sheets	This Dashboard is Not optimized for use with Google Sheets.
7	Support	**For support, message us on Etsy directly from your order, or send an email to Sales@SpreadWiseCo.com. Pictures are
8	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

DSK

THIS JOURNEY BEGINS WITH THE DASHBOARD

REALTOR EXPENSES & COMMISSIONS DASHBOARD

Dashboard
Inputs

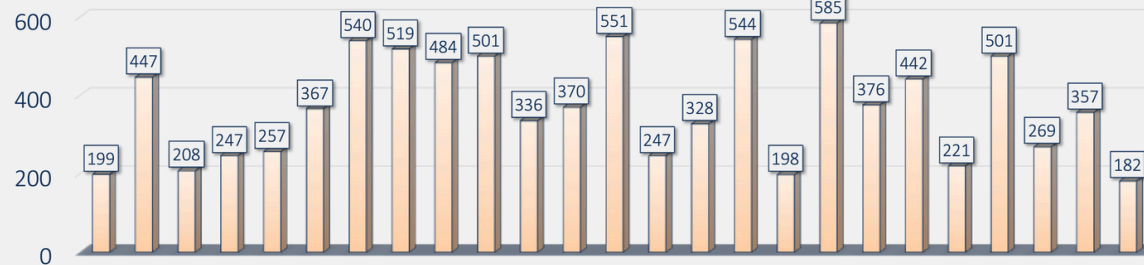
Choose Your Currency

USD

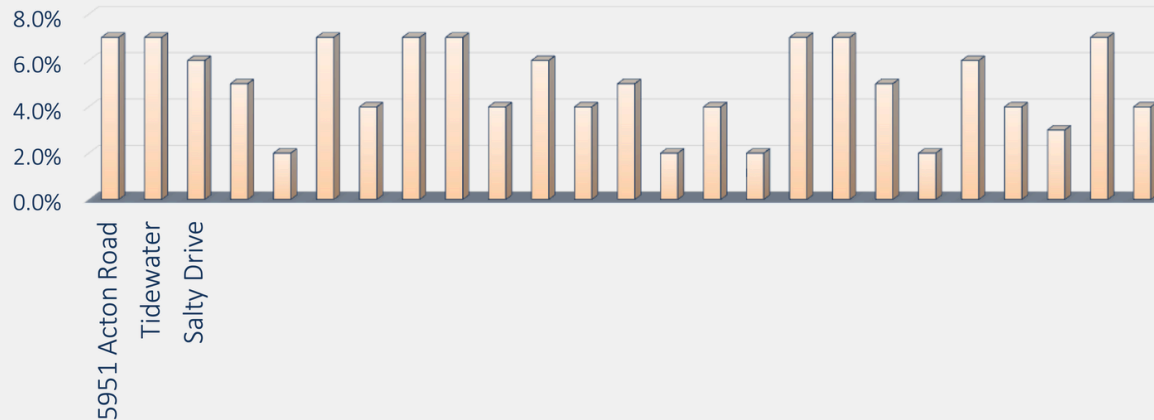
Commissions Trend Start Date (mm/yyyy)

Jan-24

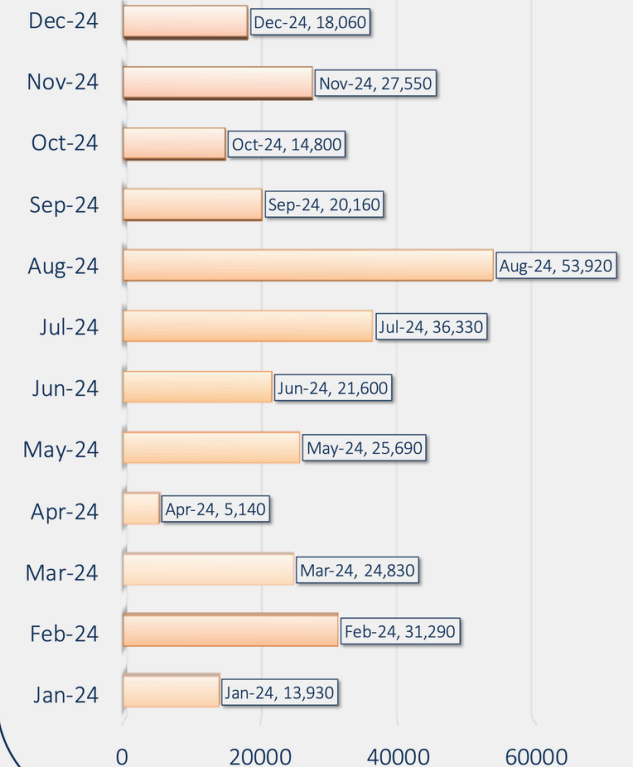
Sales Price By Property (K)



My Commission % By Property



*Total Commissions
By Month*



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2 - DASHBOARD INPUTS

DSK

SELECT YOUR CURRENCY

THIS WILL SET THE CURRENCY
FOR THE ENTIRE WORKBOOK

SET YOUR STARTING MONTH
FOR YOUR 12 MONTH
COMMISSIONS TREND GRAPH

REALTOR EXPENSES & COMMISSIONS DASHBOARD

Dashboard
Inputs

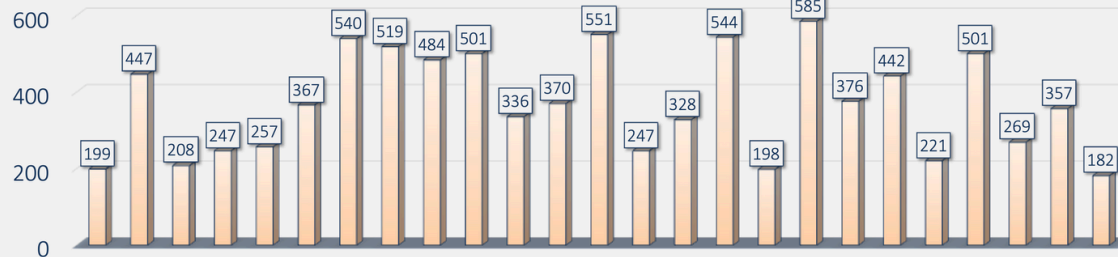
Choose Your Currency

USD

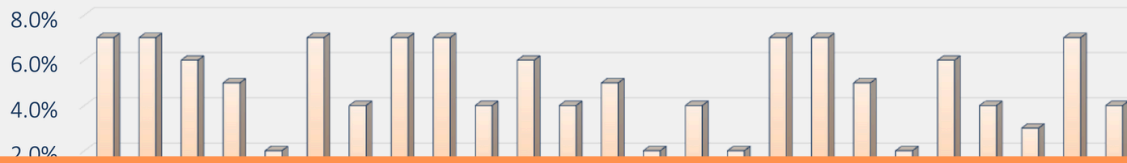
Commissions Trend Start Date (mm/yyyy)

Jan-24

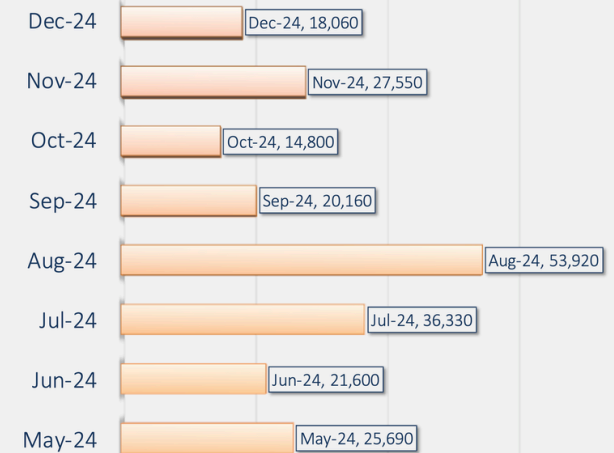
Sales Price By Property (K)



My Commission % By Property



*Total Commissions
By Month*



DSK

SET YOUR
EXPENSE
BUDGET

5951 Acton Road

LINK TO DASHBOARD	Yes
-------------------	-----

Actual Sale Date
(mm/dd/yyyy)

1/15/24

[illegible]

DSK

5 - COMMISSION TRACKING

DSK

SALE PRICE

TOTAL COMMISSIONS TO
BE PAID BY SELLER

WHAT % OF THE
COMMISSIONS
WILL YOU GET?

ACTUAL SALES
DATE

5951 Acton Road

USD

Sales Price	\$	205,000.00
Total Commission %		5.00%
Total Commissions	\$	10,250.00
My % Of Commissions		50.00%

Actual Sale Date
(mm/dd/yyyy)

1/15/24

TO DASHBOARD

Yes

My Property Earn \$ 5,125.00

Total Cost	Receipt Filed
55.00	Yes
-	
-	
-	
-	
-	
-	
-	
-	
-	
-	
-	
-	
-	
-	

Description	Additional Comments
Fuel For Travel	

Tax Category (Drop Down List)
Vehicle
Home Office
Communications
Supplies
Office Expenses
Startup Costs
Assets
Advertising
Legal & Professional Fees
Other

6 - DASHBOARD LINK

DSK

THE DASHBOARD LINK ALLOWS YOU QUICKLY DISCONNECT/CONNECT A PROPERTY EXPENSES AND COMMISSIONS FROM YOUR OVERALL DASHBOARD.

EXPENSE TRACKING

5951

Property Name

5951 Acton Road

Expense Budget

\$ 500.00

Total Expenses

\$ 55.00

Commissions

\$ 5,125.00

% Commissions

2.50%

USD

LINK TO DASHBOARD

Yes

Sales Price

Total Commission %

Total Commissions

My % Of Commissions

My Property Earn

#	Date (MM/DD/YYYY)	Vendor	Expense / Tax Category	Total Cost	Receipt Filed	Description
1	1/1/24	Gas Station	Vehicle	\$ 55.00	Yes	Fuel For Travel
2				\$ -		
3				\$ -		
4				\$ -		
5				\$ -		
6				\$ -		
7				\$ -		
8				\$ -		
9				\$ -		
10				\$ -		
11				\$ -		
12				\$ -		
13				\$ -		
14				\$ -		
15				\$ -		
16				\$ -		
17				\$ -		
18				\$ -		
19				\$ -		

DSK

5951 Acton Road

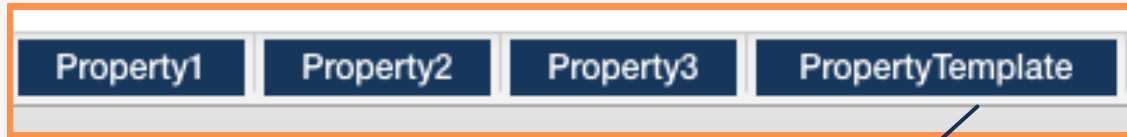
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DSK

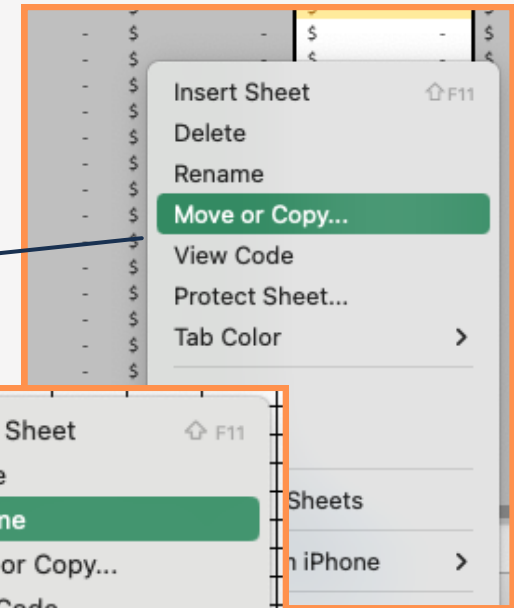
SELECT THE PROPERTY, FILL OUT
THE DETAILS, AND PRINT/EMAIL!

[illegible]

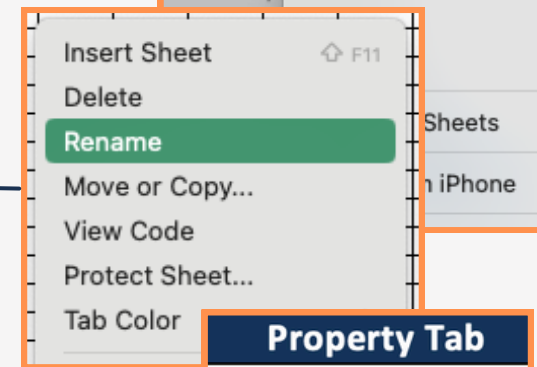
8 - ADDING PROPERTY TABS



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 DATA TABLE EXACTLY.

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

Property Tab
Property1
Property2
Property3
Property4
Property5
Property6
Property7
Property8

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