Start with one real job

A practical guide to the workbook you purchased

Your purchase contains the workbook or bundle named on your receipt. This guide covers the full catalog; it does not add products to your purchase. These are standalone Excel (.xlsx) files, with no macros, DMS links, automatic accounting sync or hosted account.

Set up a clean working copy

1. Keep the original download as your master. Save a separate copy for each job, quote or reporting period.

2. Open Start Here. Read the input labels and replace the illustrative sample with your own records. Type zero when a required cost is genuinely zero; do not leave it blank.

3. Edit input cells; preserve formulas. Clear sample rows in logs without deleting rows or columns. Keep costs, revenue and dates on a consistent basis.

4. Resolve n.a., CHECK INPUTS and reconciliation messages before relying on totals. n.a. means the result is unavailable or the ratio has no meaningful denominator.

5. Reconcile to a familiar job or statement before using the model for a client decision. Save an archived copy of each issued document.

Excel and Google Sheets

Open the .xlsx in Excel. To try Google Sheets, upload a copy to Drive and open it with Sheets, then verify formulas, dropdowns and layout. Native Excel and Google Sheets behavior has not been fully certified for this release. Do not assume a successful import means every feature survived.

All monetary examples use USD. Formatting a cell in another currency does not convert its value. Dates must be spreadsheet dates, not free-form text.

Price the whole scope

Estimator, bid templates and client proposals

Job Estimating & Bid Calculator

Enter quantities and unit costs in Takeoff & Costs. Labor rates are base wages; the burden input adds payroll-related costs. Avoid counting the same labor in crew lines and subcontractor prices. Set contingency and overhead using your own records. Bid Summary prices the total cost basis at your chosen gross margin.

Worked example	Result
Cost basis / gross margin	$26,125.20 / 30%
Bid price, rounded to cents	$37,321.71
Overhead assumption	18% of the bid price
Modeled net profit, before other costs	$4,478.60

Margin = profit / price; markup = profit / cost. A 30% margin uses cost / 0.70. The comparison column deliberately shows what happens when the same percentage is incorrectly used as markup. Neither calculation guarantees the final job profit.

Bid Templates - four job types

Choose Kitchen, Bathroom, Deck or Addition. Replace every named cost with a scoped quote. Contingency is added to cost before dividing by one minus margin. Use reserved rows; inserting or deleting rows requires rechecking formulas. Templates contain illustrative scopes and costs, not regional pricing data.

Proposal & Quote Generator

Enter your business details and defaults, then build the client scope and costs. The active margin links to the business default; the optional override replaces it for that quote, including a valid 0% override. Line prices are rounded to cents before totaling.

Tax applies to the entire subtotal. This version does not calculate mixed taxable and exempt line items. Confirm the correct treatment before issuing a proposal. Send only an exported Proposal sheet PDF: the workbook contains your internal costs and margins.

Control changes and costs

Change orders, actual costs and the business dashboard

Change-Order Calculator + Doc Generator

Price direct costs plus documented disruption and remobilization. Enter a schedule extension in calendar days. The CO Log holds six approved changes with unique IDs; enter signed amounts and keep credits negative. The document adds the original contract, other approved changes and this change, excluding the matching current ID to avoid counting it twice.

Sample contract adjustment	Amount
Original contract	$60,000.00
Prior approved CO-002	$1,850.00
Current CO-001	$6,174.29
Revised contract including current change	$68,024.29

Log approved changes only. Save a PDF of the issued document and obtain the approvals required by your contract before performing changed work. A pending change should not silently become recognized revenue.

Job-Costing & Margin Tracker

Cost Log supports 500 entries (rows 6-505). Enter a numeric date, exact cost code, description and amount. Negative amounts are credits. Unknown codes and incomplete records block the dashboard so expenses cannot disappear from the total. The sample logs $18,400 of actual costs.

Budget-rate forecast = actual cost + budget x unfinished share. Current-pace forecast = actual cost / completion. Both assume costs track progress; front-loaded materials can distort them. Update completion using a consistent method and compare forecast with remaining commitments.

Contractor Business Dashboard

Manually enter up to ten jobs for one reporting period and mutually exclusive overhead. Use recognized revenue and matching actual costs, not unsigned bids. Owner compensation expense belongs in the P&L; distributions and draws do not. With zero or negative gross margin, the model cannot calculate a positive break-even revenue.

Plan cash and billing

Draw schedules and the 13-week forecast

Payment & Draw Schedule Builder

Enter the signed contract price, agreed retainage and up to eight milestone draws. Percentages must total 100%. The final active draw absorbs cent rounding so scheduled billing matches the contract. Retainage rounds on each draw; the release is their total.

$60,000 sample, 10% retainage	Result
Sum of gross draws	$60,000.00
Net scheduled milestone cash	$54,000.00
Final retainage release (request #9)	$6,000.00
Total scheduled cash including release	$60,000.00

Select draws 1-8 or 9 for retainage release. Use the agreed release date when exporting request #9. Running totals assume the preceding scheduled draws were billed; they are not an invoice ledger or proof of payment. Update the schedule for agreed contract changes.

Deposit and retainage defaults are illustrations. Check your signed contract, lender requirements and local rules. California home-improvement deposits are generally limited to the lesser of 10% or $1,000; that example is not a rule for other jurisdictions.

13-Week Cash-Flow Forecaster

Start with reconciled available bank cash, the first week date and your minimum buffer. Enter expected receipts and payments in the week cash actually moves. Blank movement cells mean intentionally no movement; include taxes, loan payments and owner draws where applicable. Thirteen weeks is 91 days, not necessarily a calendar quarter.

Weekly roll-forward: archive the file; copy VALUES from D:O into C:N on both Cash In and Cash Out; clear the new week in O; advance the start date seven days; replace opening cash with actual reconciled cash. Never delete columns or roll the forecast using projected cash as if it were actual.

Budget value and organize tax data

Renovation scenarios and vendor payment review

Renovation Budget + ROI - full and Lite

Select the exact project type. Enter the base cost and contingency. The published 2025 Cost vs. Value point is a national historical reference; the downside is an illustrative 20% haircut applied to that point. These are not a published low/high range, confidence interval, appraisal or prediction.

Midrange bathroom sample	Result
Base cost / contingency	$23,500 / 10%
Total budget	$25,850
Published reference / illustrative downside	80% / 64% of base cost
Modeled added value	$18,800 / $15,040
Budget less modeled value, assuming buffer spent	$7,050 / $10,810

The full version adds itemized budgeting, proportional project scenarios and a financing estimate. Zero APR is supported; a zero term is unavailable. Loan fees, appreciation, taxes and selling costs are not modeled. Seek local comparable-sale evidence before treating resale value as a decision input.

Subcontractor + Vendor Tracker (1099)

Capacity: ten vendors and 500 payment entries (rows 7-506). Use unique vendor names, numeric dates and exact methods. Direct-pay totals include Check, Cash and ACH. Card and qualifying third-party network payments are excluded. Other or invalid entries require review; the tool does not file tax forms.

The selected year and threshold must agree: $600 for 2025 or $2,000 for 2026. Later years require a verified threshold and updated review logic. Check W-9 tax classification, service eligibility, corrections, backup withholding and state rules. Backup withholding can require reporting below the normal threshold. Do not store taxpayer IDs in this template.

Check before sharing

A repeatable quality check for every new file

• Reconcile inputs to source records. Replace all sample business names, contacts, dates and costs.

• Confirm the reporting period, units and sign convention. Remove duplicate costs and approved change IDs.

• Resolve every unavailable result and input warning. Compare at least one key number with an independent calculation.

• Export only the client-facing sheet. Set the print area, orientation and scaling in your spreadsheet application; inspect each PDF page for clipping and missing text.

• Keep the issued PDF and the matching workbook together. Never email the whole internal workbook to a client when it contains your cost and margin details.

Sources and definitions

Historical remodeler margin context: NAHB, FY2024 results, published April 2026. Gross margin 29.9%; net margin 6.3%. These are company-level references, not promised job results.
NAHB source article

Renovation reference points: JLC / Zonda 2025 Cost vs. Value. Each workbook identifies specific project types; the downside haircut is our scenario assumption.

Tax review: IRS Instructions for Forms 1099-MISC and 1099-NEC. Contract example: California CSLB home-improvement contracts. Sources checked September 19, 2026.

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Email hello@bidsolid.com with the product, release date, tab, cell and steps that reproduce the issue. Send a redacted example; do not email customer records or taxpayer IDs. BidSolid offers a 14-day money-back guarantee. Your existing license terms follow on the next page.

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