Start your first quote

Use QUOTE GUARD for live inputs. START HERE contains fixed instructions.

Open: Contractor-Profit-Guard-Repainting-V1.xlsx. No macros or add-ins. Six tabs appear along the bottom. Blue cells accept inputs; gray cells contain calculations.

1. Open your working copy

Google Sheets: upload the .xlsx to Google Drive and open it with Google Sheets. If it remains in Excel format, use File > Save as Google Sheets when available. Keep the original download as a backup. Excel users can open the .xlsx directly. No macro permission is needed.

2. Run the input test

In **QUOTE GUARD**, change Materials total **E16 from 800 to 900** and press Enter. With all other example inputs unchanged, Direct costs **E26** becomes **$2,941.60**, up $100, and Suggested price **E31** becomes **$4,751.82**. Return E16 to 800 afterward.

3. Find the right tab

Tab	Use it for
BUSINESS SETUP	Review labor, overhead, margin and work groups.
QUOTE GUARD	Price the next job and inspect labor history.
JOB TRACKER	Save accepted quotes; update actual hours and costs.
LEAK REVIEW	Review a job; record changes, causes and actions.
GUARD DASHBOARD	Completed-job totals, separately for Example and Live.

Editing instructional text does not change calculations. Draft quote changes do not affect saved-job dashboard totals until the quote is saved.

Set up your business

Replace example assumptions before relying on prices for actual work.

Cell in BUSINESS SETUP	Enter or review
E6 / E7	Target gross margin / contingency. Sample 35% and 5% rates are not recommendations.
E8	Loaded labor cost per productive person-hour, including owner field work at replacement cost.
E9 / E10	Annual overhead / annual productive person-hours. Avoid double-counting costs in labor and overhead.
E11	Calculated overhead per hour. Leave the formula intact.
E12 / E13	Select Yes after reviewing setup / method version. Change the version if your raw estimating method changes.
A25:A34	Work groups. Match similar prep, scope and access.

Three people working eight hours equals **24 person-hours**. The optional helper in E39:E43 calculates a loaded rate. If appropriate, copy its result as a value into E8; the helper is not automatically linked.

4. Enter a quote

In QUOTE GUARD select **Live in E5**. Enter unique ID E6, date E7, label E8 and work group E9. Review method E10. Enter raw hours E11, rates/targets E12:E15, four nonlabor totals E16:E19 and proposed price E20.

E21 choices: **Keep own** uses raw hours; **Use history** uses an eligible recommendation; **Manual** uses E22. Fewer than three qualifying jobs means no history recommendation: use Keep own or Manual. Inspect E36 for warnings.

Gross profit is before overhead. After-overhead contribution also subtracts allocated overhead, but is not business net profit or cash available. Suggested price is a scenario, not guaranteed profit.

Save, update and close

Saved quote values preserve history when current rates change.

5. Save an accepted quote

Resolve input errors. Copy **QUOTE GUARD A43:S43**. Open JOB TRACKER; select column A on the next empty row between 5 and 104 (row 8 in a fresh copy). Choose **Paste special > Values only**. Paste exactly once into A:S. Never paste over an existing job.

Check ID, price and hours. QUOTE GUARD will now say the ID is already saved; this helps prevent duplicates. Give the next quote a new ID. Current setup changes intentionally leave saved budgets unchanged.

JOB TRACKER columns	Enter
T / U / V	Status / update date / completion date when complete.
W / X	Actual person-hours / actual loaded labor dollars. Hours alone do not calculate actual labor dollars.
Y / Z / AA / AB	Actual materials / subs / equipment / other costs. Enter known zeros.
AC	Remaining direct costs for an Active forecast. Exclude costs already in actuals. Blank = final profit unknown.
AD / AE / AF	Final costs confirmed? / Same scope? / Comparable? Select Yes or No honestly.

6. Close and review

When all costs are known, set Complete, enter completion date and confirmations. In **LEAK REVIEW D5**, select the job. Review costs and reserve; record causes only with evidence. On GUARD DASHBOARD, choose Live in C5 and check dates F5/J5.

Only qualifying completed jobs contribute to labor history. Any Change record excludes a job from V1 history, even when approved. Example jobs never enter Live results.

Troubleshooting and changes

Check the input and workflow before changing a formula.

What you see	What to check
Nothing updates	Use QUOTE GUARD, edit E16 and press Enter. E26 should contain a formula beginning =IF. A plain number may mean the formula was overwritten; restore from a clean copy.
Blank suggested hours	Check mode, group, method, dates and eligibility. Too little history, outliers or large spread suppress the suggestion.
Blank final profit	Active: enter remaining cost. Complete: enter final costs, completion date and confirmation.
Dashboard stayed the same	Save the quote. Totals use completed jobs, selected mode and completion-date range. Drafts and active jobs are excluded.
Saved price did not change	Correct: snapshots contain values. New rates affect new quotes only.
Cannot save quote	Check E36: required numbers, valid margin, positive price, labor choice and unique ID.

Change records: LEAK REVIEW row 33 onward

For a **Change**, fill A:O: unique record ID, Job ID, Type, description, status, all signed amounts F:M (zero when none), approval date when Approved, and extra-work incurred cost O (zero when none). O is a subset of actual costs, never an additional expense. Approved rows revise revenue and budgets.

For a **Cause**, fill A:D and P:R: IDs, Type = Cause, action, category, cause and signed attributed variance. Leave change-only fields blank. Check column S. Negative credits use the revised budget bridge; the simple change-price gap skips negative entries.

Capacity: 100 job slots and 300 review records; do not extend rows. Formula cells are unlocked in this review build. For help with a purchased copy, use the purchase platform and provide version, tab, cell and a redacted screenshot. Basic Google Sheets recalculation is confirmed; full platform workflow checks remain.