

Financial Worksheet Diagram: Creating a Financial Plan

The financial worksheet is a tool that helps outline job value, budget jobs and track your financial progress to better manage job profitability.

Estimate Import List

See a list of all estimates imported, including change orders and supplementals.

Categories of Work

All categories of work from Xactimate will be imported into this list; colors correspond to the related estimate.

Expanded Categories

Click to expand a category of work to see a breakdown of labor, material and equipment.

Work Orders Created

When green, this icon indicates a work order has been created for this work.

Progress & Profit

When related work orders are completed, this column will auto-fill with the budget amount; if over/under budget, manually update to see your profitability on those categories.

Type of Work Order

Indicate if the work should be subbed out or handled in-house.

Estimate									
Import Estimate									
Action	Project Name	Estimator	Created	Imported	Line Item Total				
Delete	ASSURED-RBD-1	Vesna Hojzan	04/08/2015 10:32 AM	07/08/2015 2:29 PM	\$13,606.63				
Plan									
Edit New Work Order									
Category	Estimate	Hours	Budget	GM	Hours	Progress	GM	Hours	Progress Profit
CLEANING	\$286.70	7.71	\$286.70 E	0%	7.71 W				
GENERAL DEMOLITION	\$497.09	1.80	\$497.09 E	0%	1.80 W				
DOORS	\$155.67	2.91	\$155.67 E	0%	2.91 W				
DRYWALL	\$2,456.54	26.97	\$2,456.54 S	0%	26.97 W				
FLOOR COVERING - CA...	\$4,010.73	9.95	\$4,010.73 E	0%	9.95 W				
FLOOR COVERING - VI...	\$1,161.12	5.80	\$1,161.12 E	0%	5.80 W				
FINISH CARPENTRY / T...	\$895.36	8.83	\$895.36 S	0%	8.83 W				
FINISH HARDWARE	\$129.84	0.27	\$129.84 E	0%	0.27 W				
INSULATION	\$350.64	2.23	\$350.64 E	0%	2.23 W				
PAINTING	\$3,606.38	53.35	\$3,606.38 E	0%	53.35 W				
Labor	\$2,700.85	53.35	\$2,700.85	0%	53.35				
Material	\$905.53		\$905.53	0%					
Equipment				0%					
Market Condition	\$56.56		\$56.56			\$56.56			
Subtotal	\$13,606.63	119.82	\$13,606.63	0%	119.82	\$56.56		0.00	
Overhead	\$1,408.48	10%	\$1,408.48			\$1,408.48			
Profit	\$1,408.48	10%	\$1,408.48	8%		\$1,408.48	8%		
Fees	\$0.00		\$0.00			\$0.00			
Tax	\$1,322.39		\$1,322.39			\$1,322.39			
Grand Total	\$17,745.98		\$17,745.98			\$17,745.98			

↑ Estimate

↑ Budget

↑ Progress