SAMPLE ESTIMATE PACK DOCUMENT

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Estimate Pack is a set of pre-designed spreadsheets for estimating a variety of projects. The collection as a whole will meet many of your needs.

The spreadsheets are designed to facilitate fast and easy calculations for project estimates. These estimates can then be fine-tuned over time to become more and more accurate.

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Financial Statement Calculator

Assets	2017		Notes Payable					
Current Assets	**Amount**		**Creditor**	**Balance**	**Payment**	**Frequency**	**How Secured**	
Cash	$0		<< Creditor #1 >>	$0	$0	Annual	Real Estate	
Accounts Receivable	$0		<< Creditor #2 >>	$0	$0	Unknown	Unkown	
Investments	$0		<< Creditor #3 >>	$0	$0	Unknown	Unkown	
Inventory	$0		<< Creditor #4 >>	$0	$0	Unknown	Unkown	
<< Asset #5 >>	$0		<< Creditor #5 >>	$0	$0	Unknown	Unkown	
<< Asset #6 >>	$0		<< Creditor #6 >>	$0	$0	Unknown	Unkown	
<< Asset #7 >>	$0		<< Creditor #7 >>	$0	$0	Unknown	Unkown	
<< Asset #8 >>	$0		<< Creditor #8 >>	$0	$0	Unknown	Unkown	
<< Asset #9 >>	$0		<< Creditor #9 >>	$0	$0	Unknown	Unkown	
<< Asset #10 >>	$0		<< Creditor #10 >>	$0	$0	Unknown	Unkown	
<< Asset #11 >>	$0		<< Creditor #11 >>	$0	$0	Unknown	Unkown	
<< Asset #12 >>	$0		<< Creditor #12 >>	$0	$0	Unknown	Unkown	
<< Asset #13 >>	$0		<< Creditor #13 >>	$0	$0	Unknown	Unkown	
<< Asset #14 >>	$0		<< Creditor #14 >>	$0	$0	Unknown	Unkown	
<< Asset #15 >>	$0		<< Creditor #15 >>	$0	$0	Unknown	Unkown	
<< Asset #16 >>	$0		<< Creditor #16 >>	$0	$0	Unknown	Unkown	
<< Asset #17 >>	$0		<< Creditor #17 >>	$0	$0	Unknown	Unkown	
<< Asset #18 >>	$0		<< Creditor #18 >>	$0	$0	Unknown	Unkown	
<< Asset #19 >>	$0		<< Creditor #19 >>	$0	$0	Unknown	Unkown	
<< Asset #20 >>	$0		<< Creditor #20 >>	$0	$0	Unknown	Unkown	
Total Current Assets:	**$0**		Totals:	**$0**	**$0**			
			Stocks and Bonds					
Fixed / Long Term Assets	**Amount**		**Security**	**Shares**	**Cost**	**Value**	**Date**	
Equipment	$0		<< Security #1 >>	0	$0	$0		
Minus Depreciation	$0		<< Security #2 >>	0	$0	$0		
Real Estate	$0		<< Security #3 >>	0	$0	$0		
Intangible Assets	$0		<< Security #4 >>	0	$0	$0		
<< Asset #5 >>	$0		<< Security #5 >>	0	$0	$0		
<< Asset #6 >>	$0		<< Security #6 >>	0	$0	$0		
<< Asset #7 >>	$0		<< Security #7 >>	0	$0	$0		
<< Asset #8 >>	$0		<< Security #8 >>	0	$0	$0		
<< Asset #9 >>	$0		<< Security #9 >>	0	$0	$0		
<< Asset #10 >>	$0		<< Security #10 >>	0	$0	$0		
<< Asset #11 >>	$0		<< Security #11 >>	0	$0	$0		
<< Asset #12 >>	$0		<< Security #12 >>	0	$0	$0		
<< Asset #13 >>	$0		<< Security #13 >>	0	$0	$0		
<< Asset #14 >>	$0		<< Security #14 >>	0	$0	$0		
<< Asset #15 >>	$0		<< Security #15 >>	0	$0	$0		
<< Asset #16 >>	$0		<< Security #16 >>	0	$0	$0		
<< Asset #17 >>	$0		<< Security #17 >>	0	$0	$0		

	Amount					
<< Asset #18 >>	$0	<< Security #18 >>	0	$0	$0	
<< Asset #19 >>	$0	<< Security #19 >>	0	$0	$0	
<< Asset #20 >>	$0	<< Security #20 >>	0	$0	$0	
Total Fixed / Long Term Assets:	$0	Totals:		$0	$0	

Sources of Income	Amount	Real Estate Property	Cost	Current Value	Owed	Monthly Payment
Product Sales	$0	<< Property #1 >>	$0	$0	$0	$0
Service Sales	$0	<< Property #2 >>	$0	$0	$0	$0
Investment Income	$0	<< Property #3 >>	$0	$0	$0	$0
Real Estate Income	$0	<< Property #4 >>	$0	$0	$0	$0
<< Income #5 >>	$0	<< Property #5 >>	$0	$0	$0	$0
<< Income #6 >>	$0	<< Property #6 >>	$0	$0	$0	$0
<< Income #7 >>	$0	<< Property #7 >>	$0	$0	$0	$0
<< Income #8 >>	$0	<< Property #8 >>	$0	$0	$0	$0
<< Income #9 >>	$0	<< Property #9 >>	$0	$0	$0	$0
<< Income #10 >>	$0	<< Property #10 >>	$0	$0	$0	$0
<< Income #11 >>	$0	<< Property #11 >>	$0	$0	$0	$0
<< Income #12 >>	$0	<< Property #12 >>	$0	$0	$0	$0
<< Income #13 >>	$0	<< Property #13 >>	$0	$0	$0	$0
<< Income #14 >>	$0	<< Property #14 >>	$0	$0	$0	$0
<< Income #15 >>	$0	<< Property #15 >>	$0	$0	$0	$0
<< Income #16 >>	$0	<< Property #16 >>	$0	$0	$0	$0
<< Income #17 >>	$0	<< Property #17 >>	$0	$0	$0	$0
<< Income #18 >>	$0	<< Property #18 >>	$0	$0	$0	$0
<< Income #19 >>	$0	<< Property #19 >>	$0	$0	$0	$0
<< Income #20 >>	$0	<< Property #20 >>	$0	$0	$0	$0
Total Income:	$0	Totals:	$0	$0	$0	$0

Total Assets:	$0

Liabilities	2017

Liabilities	Amount
Accounts Payable	$0
Taxes Payable	$0
Line of Credit	$0
Accrued Payroll	$0
<< Liability #5 >>	$0
<< Liability #6 >>	$0
<< Liability #7 >>	$0
<< Liability #8 >>	$0
<< Liability #9 >>	$0
<< Liability #10 >>	$0
<< Liability #11 >>	$0
<< Liability #12 >>	$0

<< Liability #13 >>	$0	
<< Liability #14 >>	$0	
<< Liability #15 >>	$0	
<< Liability #16 >>	$0	
<< Liability #17 >>	$0	
<< Liability #18 >>	$0	
<< Liability #19 >>	$0	
<< Liability #20 >>	$0	
Total Liabilities:	**$0**	

Fields in white are data entry fields
Fields in green contain calculations
Fields in blue are dynamically linked to the Word template. These fields may be data entry fields or may contain calculations.

If you use the dynamic linking to your Word template feature the tags in the Word template will be replaced with dynamic links to the cells in blue.
For example, in the Word template FinancialStatement.doc the <<R5C2>> corresponds to cell row 5 and column B. B is the 2nd column over.
If you customize the spreadsheet and Word template all you have to ensure is the <<R#C#>> tags match up with the correct cells and the Wizard
will do the work of turning them into dynamic links. When you save your spreadsheet the Word template will update when it is opened.

The spreadsheets are designed to work with the Word templates so that only the fields you want displayed in the Word document are linked. This way you can control how much detail is shown in the final Word document.

Spreadsheets with many links to a Word document can cause slow processing in the Wizard and slow opening of the linked Word document. Deleting <<R#C#>> tags you do not need from the Word document will speed it up.

This estimate document is only included in the Proposal Kit Professional product.

This sample has been truncated to only show the first part. The complete editable version of this document is included in the Proposal Kit Professional product found at:

ProposalKit.com/htm/proposal-software-products.htm