Your first 15 minutes

Five steps take you from a blank file to a real quote and a price list you can hand to clients.

Set it up

1. **Open the file.** 1 minute
   - **Excel:** double-click it. It works in Excel 2019 or newer and Microsoft 365.
   - **Google Sheets:** in Google Drive choose New, then File upload. When it's uploaded, right-click it and choose Open with, then Google Sheets.

2. **Settings: your business and your costs.** 3 minutes
   - Business name, phone and email. They print on every quote and price list.
   - **Labor cost per hour:** what an hour of cleaning costs you. Working solo? Use the pay you want per hour, before taxes.
   - **Target profit margin:** what you want left after labor, supplies and travel. 35% is the example.
   - Supplies per job and your cost per mile.

3. **Rate Card: your pace and prices.** 5 minutes
   - **Pace** is the square feet you clean per labor hour. Time a few real jobs: home size divided by total labor hours.
   - Minimum price for each service, your add-on prices and minutes, and your recurring discounts.
   - Every number there is a starting point, not a market rate. Change them all to yours.

4. **Quote: price a real job.** 2 minutes
   - Pick the service, then enter the home size, rooms, condition and how often.
   - The box on the right is the client's quote: print the tab or take a screenshot.
   - The **Check** line on the left tells you whether the price meets your target margin, and why not when it doesn't.

5. **Price List: one page for your clients.** 2 minutes
   - Set the home sizes you clean most. Prices fill in from your Settings and Rate Card, with prices for regular visits and your add-ons underneath.
   - Print the tab or save it as a PDF to send. It updates whenever your prices change.

What the colors mean

Yellow: type here. Gray: calculates itself. Leave these alone.

> **Before your first real job:** remove the rows marked (sample) on the Clients, Jobs and Expenses tabs. Right-click the row number and choose Delete row. Don't just clear the cells: that erases the gray formulas.

Keep it running

A few minutes a week keeps your numbers honest.

Every week

- Add new clients on **Clients**, with their usual service, how often and price per visit.
- Log each job on **Jobs**: date, client, service, price, labor hours and miles. Mark it Unpaid when it's done and Paid when the money arrives.
- Log every cost on **Expenses**, including payroll.

Every month

- **Dashboard**: revenue, expenses, net profit and what to set aside for taxes, month by month.
- **Price Check**: which regular clients' prices have fallen behind your pricing rules at today's costs, and what a raise is worth a year. Pick a client to get a ready-to-send price-increase note.

At tax time

- Each January, add the new year's IRS standard mileage rate to the table on **Settings** (search "standard mileage rates" on irs.gov). If the IRS changes it mid-year, add the July rate too: 2026 is 72.5 cents a mile to June 30 and 76 cents from July 1.
- Open **Year-End Summary**. From January to April it shows last year. Add any business miles you tracked elsewhere, then print it or save it as a PDF for whoever does your taxes.
- The summary, the mileage amount and the tax set-aside add up what you log. They aren't tax advice: your tax preparer has the final word.

If something looks off

The quote shows no price	Read the Check line: it names what's missing, such as a pace for that service or the home size.
A list won't accept my client	Add the client on the Clients tab first. The lists on Jobs and Price Check come from there.
A number won't go in	Type digits only: `2000`, not "2,000 sq ft". Percentages go in as `35%`.
Price Check says "Log a visit"	Log a job with labor hours for that client's usual service at their current price, or fill in their home size.
Year-End payments look low	Paid jobs need a paid-on date. Jobs marks missing ones in red.
A job isn't on the Dashboard	It needs a date and a status of Unpaid or Paid.
The last-job date is blank in Excel	That column needs Excel 2019 or newer, or Microsoft 365.

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