

Your Rate Book, step by step

Six steps from opening the file to getting paid, shown with one example job. Every figure is the real file's own working.

First, open the file

Orange box: you type it

White box: the file works it out

Got Excel, on a PC or a Mac?

Double click the file. That is it.

On a Mac with Numbers, or no Excel at all?

Open it in Google Sheets. It is free and runs in Safari or Chrome.

1. Go to drive.google.com and sign in with a free Google account.
2. Press **New**, then **File upload**, and pick your Rate Book.
3. Double click it, then press **Open with Google Sheets**.

Why not Numbers? It loses the dropdown lists for your town and tax area.

Opened the free sample in your browser?

Press **Edit a copy** at the top to type in it. It needs a free Microsoft account.

1 Fill in Your Numbers

Tab: Your Numbers

Do this once. Every other tab reads from it.

You type

Your day rate
£259

Expected profit this year
£44,000

Where you pay tax
England, Wales and NI

Nearest town
London

The file works out

Set aside from every job
18.6%

2 Add each job

Tab: Job Pricing

One row per job. It works out the price.

You type

Days on the job
2

Materials cost
£300

The file works out

Quote price
£878

Labour £518 plus materials with your markup, £360.

3 Make the quote

Tab: Quote

Type the job number. The quote fills itself in.

You type

Job number

1

↓

The file works out

Quote total

£878

Print it, or save it as a PDF to send.

4 Make the invoice

Tab: Invoice

When the job is done, type the same job number.

You type

Job number

1

The file works out

Invoice total

£878

5 Track the payment

Tab: Job Pricing

Type the dates on the job row.

You type

Invoice sent
4 Nov 2026

Payment due
11 Nov 2026

The file works out

Owed now
£878

It stays owed until you type the paid date.

6 Check your year

Tab: START HERE, the first tab

Nothing to type. It adds up every job.

You type

Nothing

The file works out

Owed to you	Tax due on it
£878	£107

Days booked
2 of 200

Tax is worked on profit, so materials you buy are left out.

Good to know

- **The quote or invoice shows £0:** check the job number matches a row on Job Pricing.
- **There is no list to pick your town or tax area:** the file is open in Apple Numbers. Open it in Google Sheets instead.
- **You typed over a cell that works itself out:** undo it. Only type in the pale orange cells.
- **You want to check a price:** the Town Rates tab shows the going day rate in each town in your file.