
HOW-TO GUIDE

Construction Bid Template

A 10-minute read that gets you from a blank workbook to a finished, client-ready bid — without a \$200/month estimating package.

FOR GENERAL CONTRACTORS · REMODELERS · SMALL COMMERCIAL BUILDERS

INSIDE THIS GUIDE

What you'll learn, in order.

Six steps from blank workbook to a bid you can stand behind in front of a client. Plus the one mistake almost everyone makes when they add rows.

01	Fill in the project header	2 minutes
02	Set your categories	1 minute
03	Build the bid	15–30 minutes
04	Set markup, tax, and misc %	1 minute
05	Choose what prints on the Estimate	1 minute
06	Fill the Term Sheet and send	final pass + signatures
A	How to add new rows	read this — the #1 question
B	Cheat sheet • Troubleshooting	reference

WHAT'S IN THE WORKBOOK

Three tabs. You'll live in the first one.

The Bid Calculator drives everything. The Estimate auto-pulls only the lines you've flagged to print. The Term Sheet is the formal signature page you attach when you send the bid.

TAB	WHAT IT'S FOR	EDIT IT?
Bid Calculator	The master sheet — project header, every line item, markup, tax, and the running bid total	Yes
Estimate	The client-facing version — auto-pulls every row you've flagged with a ✓	Mostly no — just the FROM / BILL TO blocks
Term Sheet	A formal invoice / acceptance page with terms and signature blocks	Yes — sender, recipient, dates, terms text

BUILT TO EXPAND — NOTHING'S HARDCODED

Add as many line items or categories as the bid needs. The summary and the Estimate re-flow together.

This is the difference between a template built for one example bid and a template built to run any bid you throw at it.

- Tight residential remodel with 15 line items? The Estimate prints 15 lines.
- Commercial build with 150 line items, 8 categories, and mixed markup per line? Same Estimate, same format — just longer.
- Lines you don't want the client to see? Clear the ✓ — they still count in your internal totals.

STEP 01 · 2 MINUTES

Fill in the project header.

Open the Bid Calculator tab. Top-right corner, four input cells. These flow forward into the Estimate and Term Sheet once you fill in the FROM / BILL TO blocks there.

CELL	FIELD	EXAMPLE
N3	Project Manager	Jacob Smith
N4	Project Name	McDonalds Retail Development
N5	Project Address	1234 Anywhere St, Atlanta GA 30001
U3	Notes	Free-form scope summary, exclusions, anything you want carried forward

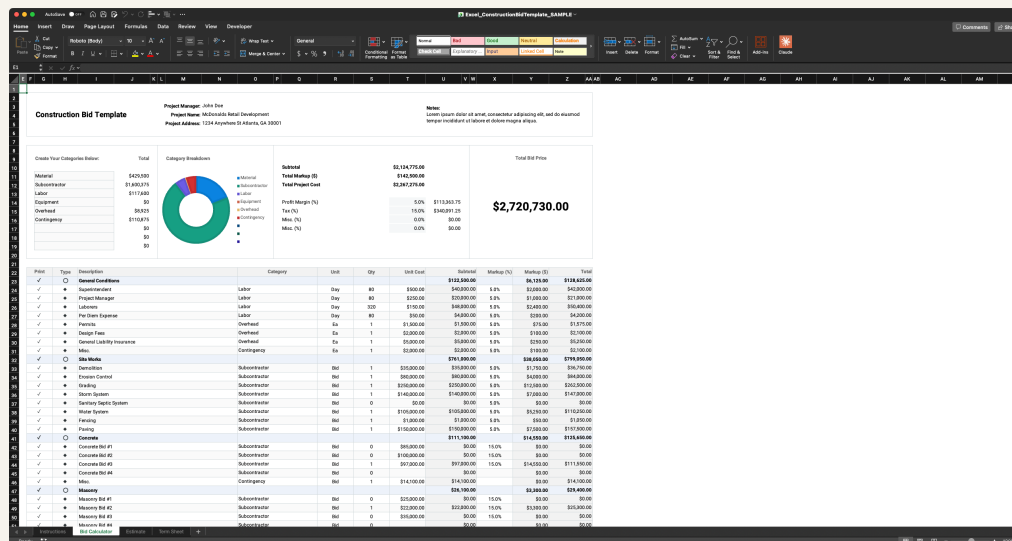


FIGURE 01 · BID CALCULATOR — PROJECT HEADER, CATEGORY LIST, AND SUMMARY BLOCK

STEP 02 · 1 MINUTE

Set your categories.

Just below the project header, cells G11 through G19 hold the category list. Six categories ship in the template — Material, Subcontractor, Labor, Equipment, Overhead, Contingency — with three blank slots for whatever your trade needs.

G11	Material
G12	Subcontractor
G13	Labor
G14	Equipment
G15	Overhead
G16	Contingency
G17	(empty – yours to define)
G18	(empty – yours to define)
G19	(empty – yours to define)

You can rename any of these or add to the three blank slots — examples: `Permits & Fees`, `General Conditions`, `Equipment Rental`. Whatever you type here becomes the dropdown source for the Category column further down.

LIVE CATEGORY BREAKDOWN

To the right of the category list, cells `J11:J19` show a live running total per category — your **Category Breakdown** mini-dashboard. It updates as you build the bid.

STEP 03 · 15-30 MINUTES

Build the bid.

The main table starts at row 22. Two levels: category headers (○) group related work; line items (◆) sit underneath. Every row needs a marker in column H — pick from the dropdown.

MARKER	MEANING
○	Start a new category
◆	A line item under the current category

PRINT CHECKBOX · COLUMN F

Type ☒ in column F to include that line on the client-facing Estimate. Leave it blank to hide the line — it still counts toward your internal totals, but the client won't see it broken out.

DESCRIPTION · COLUMN I

What the line is. Keep it short and client-readable — you'll be looking at this on the Estimate tab too.

CATEGORY · COLUMN O

Pick from the dropdown. The list comes from G11:G19 — whatever you set up in Step 02.

STEP 03 · CONTINUED · UNIT MATH & MARKUP

Quantity, cost, and markup.

Standard estimating math. The template does the multiplication. You fill in Unit, Qty, Unit Cost, and Markup % — the rest calculates.

COLUMN	WHAT TO ENTER	EXAMPLE
R · Unit	Unit of measure	Day · Ea · SF · LF · Hr
S · Qty	How many	80
T · Unit Cost	Cost per unit	500
X · Markup %	Your markup, as decimal	0.05 = 5%

Set markup **per line**. Overhead lines and high-risk subs typically carry a different markup than commodity materials — this is where that decision lives.

WHAT THE TEMPLATE FILLS IN FOR YOU

Columns A, B, C, D, U, Y, Z are all formulas. Don't type into them — they calculate the line subtotal, the markup dollars, the print flag, and the running total. The ○ rows roll up their child ◆ lines automatically.

○ General Conditions				
◆ Superintendent	80 Day × \$500	markup 5%	=	\$42,000
◆ Project Manager	80 Day × \$250	markup 5%	=	\$21,000
◆ Laborers	320 Day × \$150	markup 5%	=	\$50,400
○ Site Works				
◆ Demolition	1 Ea × \$35,000	markup 5%	=	\$36,750
◆ Erosion Control	1 Ea × \$80,000	markup 5%	=	\$84,000
◆ Grading	1 Ea × \$250,000	markup 5%	=	\$262,500

STEP 04 · 1 MINUTE

Set markup, tax, and miscellaneous %.

In the summary block just below the project header (columns Q–U, rows 10–17), four percentage inputs roll everything up into your final bid price.

CELL	FIELD	DEFAULT	WHAT IT DOES
T14	Profit Margin (%)	0.05 · 5%	Multiplies T12 → shown in U14
T15	Tax (%)	0.15 · 15%	Multiplies T12 → shown in U15
T16	Misc. (%)	0	Optional adder — bonds, financing, escalation → U16
T17	Misc. (%)	0	Second optional adder → U17

READING THE SUMMARY

T10	Subtotal — sum of all line-item subtotals
T11	Total Markup (\$) — sum of all per-line markups
T12	Total Project Cost — Subtotal + Total Markup. Your raw cost-to-build with builder margin baked in
U14:U17	Profit Margin \$, Tax \$, Misc \$, Misc \$ — derived from your percentages in column T
X10	Total Bid Price — the number you quote the client. T12 + U14 + U15 + U16 + U17

Right above all this, J11:J19 breaks the total down by category — a sanity check before you send the bid.

STEP 05 · 1 MINUTE

Choose what prints on the Estimate.

The Estimate tab is the client-facing document. It auto-pulls every Bid Calculator row where you've typed ✓ in column F. Lines without ✓ stay internal.

WHAT TO CHECK ON THE ESTIMATE TAB

- **Line items** populate from the Bid Calculator. Each printed ○ category row shows its rolled-up total; each printed ◆ line shows its individual amount.
- **FROM block** (cells F6 through F10): your business name, email, address. Type once — independent of the Bid Calculator.
- **BILL TO block** (cells I6 through I8): the client's name, email, address.
- **Subtotal, Profit Margin, Tax, Total** in the lower-right all pull live from the Bid Calculator summary.

INVOICE		INV-008
FROM Jacob Smith jacobsmith@gmail.com 1077 Wilson Street San Diego, CA United States		
BILL TO Ana Morales amorales@madisons.com 300 Valencia Street, Suite 200 San Francisco, CA 94103		
DATE 2026-03-02		
DATE 2026-04-01		
Description	Amount	
General Conditions	\$178,000.00	
Superintendent	\$40,000.00	
Project Manager	\$21,000.00	
Laborman	\$80,000.00	
Per Diem Expense	\$4,000.00	
Permits	\$1,000.00	
Design Fees	\$1,000.00	
Contract Liability Insurance	\$2,000.00	
Misc.	\$1,000.00	
Site Work	\$790,000.00	
Excavation	\$26,000.00	
Foundation	\$84,000.00	
Grading	\$20,000.00	
Storm Systems	\$140,000.00	
Sanitary Septic System	\$0.00	
Water System	\$110,000.00	
Paving	\$1,000.00	
Concrete	\$170,000.00	
Concrete Bid #1	\$0.00	
Concrete Bid #2	\$0.00	
Concrete Bid #3	\$170,000.00	
Concrete Bid #4	\$0.00	
Misc.	\$14,000.00	
Masonry	\$20,000.00	
Masonry Bid #1	\$0.00	
Masonry Bid #2	\$20,000.00	
Masonry Bid #3	\$0.00	
Masonry Bid #4	\$0.00	
Misc.	\$4,000.00	
Metals	\$200,000.00	
Metals Bid #1	\$200,000.00	
Metals Bid #2	\$0.00	
Metals Bid #3	\$0.00	

FIGURE 02 · ESTIMATE — AUTO-POPULATED FROM ROWS FLAGGED WITH ✓

THREE WAYS TO CONTROL WHAT THE CLIENT SEES

Hide a category entirely — clear the ✓ from the ○ row and from each ◆ underneath. Show the category total without the breakdown — keep ✓ on the ○ row, clear ✓ from the ◆ rows beneath. Reorder presentation — rearrange rows on the Bid Calculator; the Estimate follows that order.

BEFORE YOU PRINT — HIDE UNUSED ROWS, DON'T DELETE THEM

The Estimate is built to hold a long bid; on a shorter one you'll have empty rows at the bottom. Select those row numbers, right-click, and choose **Hide**. **Don't delete them** — deleting breaks the formulas that pull from the Bid Calculator.

STEP 06 · FINAL PASS + SIGNATURES

Fill the Term Sheet and send.

The Term Sheet is the formal acceptance page. Buyers usually attach this behind the Estimate when sending the full bid package to a client — terms, signature blocks, and an issued / due date.

CELL	FIELD	NOTES
I2	Invoice / Bid Number	Your internal number, e.g. BID-2026-014
I6	Issue Date	Today, or the date you're sending the bid
I8	Due Date	Auto-calculates as Issue Date + 30 days. Type over it for different terms
A6–A10	FROM block	Your name, email, address (may already be on the Estimate)
D6–D8	BILL TO block	Client name, email, address
Row 14	Terms & Conditions	Free-form. Edit to match your standard contract
Row 25	Bid amount in words	Update to match your X10 Total Bid Price

INVOICE
INV-000

FROM: Jacob Smith
jacobsmith@gmail.com
1577 Wilson Street
San Diego, CA
United States

BILL TO: Ana Morales
anamorales@bids.com
An Refugio 122, 12040 0460

ISSUE DATE: 2026-03-02
DUE DATE: 2026-04-01

TERMS & CONDITIONS
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Amount of Proposal
All Material is guaranteed to be as specified, and the above work to be performed in accordance with and completed in a substantial workmanlike manner for the sum of:
Two Million Five Hundred Fifty Thousand Six Hundred Eighty Four Dollars and 38/100 Cents
The above prices, specifications and conditions are satisfactory and are hereby accepted. You are authorized to do the work as specified. Payment will be made as outlined above.

SIGNATURES

CLIENT: _____ CONTRACTOR: _____

(PRINT NAME) (PRINT NAME)

(DATE) (DATE)

FIGURE 03 · TERM SHEET — INVOICE, TERMS, AND SIGNATURE BLOCKS

BEFORE YOU SEND

A two-minute sanity check.

Before you email the file (or export to PDF) to a client, glance at these. If any of them surprise you, fix it before the client sees it.

- 1 **Bid Calculator → X10 Total Bid Price.** Does the number make sense versus your internal cost-to-build?
 - 2 **Category Breakdown (J11:J19).** Any line way too high or too low for the scope of work?
 - 3 **Estimate tab.** Are the right ✓ lines on, and the wrong ones hidden?
 - 4 **Term Sheet → I2, I6, I8.** Bid number, issue date, due date all correct?
 - 5 **Term Sheet → Row 25.** Amount in words matches your X10 total?
-

If a number surprises you on a Sunday-night final check, it'll surprise the client too. Fix it now.

THE #1 QUESTION WE GET

How to add new rows.

When you run out of pre-built rows and need another line, don't just type into a blank row at the bottom. The formulas, dropdowns, and formatting are baked into the existing rows — a fresh blank row won't have any of that, and your line won't reach the Estimate.

THE RIGHT WAY · COPY, INSERT BLANK, PASTE, CLEAR

- 1 **Copy an existing row** that has data. Click the row number on the left to select the entire row, then copy (⌘+C on Mac, Ctrl+C on Windows).
- 2 **Insert a blank row** where you want the new line to live. Right-click the row number where you want it and choose **Insert** — this creates a fresh empty row above your selection.
- 3 **Paste into the new blank row** (⌘+V / Ctrl+V). You now have a duplicate of the row you copied, sitting in the right spot with all the formulas, dropdowns, and formatting intact.
- 4 **Delete the duplicate data.** Clear out the description, qty, unit cost — anything that's an input. Leave the formula columns alone (A, B, C, D, U, Y, Z). Now type your new line's data in.

THE CASE ALMOST EVERYONE ASKS ABOUT

You've already built half the bid and realize you forgot a line under "Site Works." Same four steps — copy any existing ♦ row, right-click the row number where you want the new line to slot in, choose Insert, paste, clear the duplicated data, type in the new line. The category grouping and dashboard totals pick it up automatically.

A · CONTINUED · WHAT GOES WRONG

What breaks if you skip a step.

All three of these are reversible — open a fresh copy of the BLANK template and copy your data over. But avoiding them in the first place is faster.

- **Typing into a blank row past the demo data.** No formulas — so column Z stays blank, and the row never reaches the Estimate or the totals.
- **"Insert Row" with nothing copied first.** You get a row with no dropdowns, no formatting, no formulas. Looks fine. Doesn't work.
- **Dragging a row down to copy formatting.** Sometimes works, sometimes silently breaks. Use copy / insert / paste / clear — it's reliable.

QUICK REFERENCE

WHERE	WHAT TO COPY
Adding a ♦ line item under an existing category	Copy any other ♦ row
Adding a new ○ category header	Copy any other ○ row
Inserting a line between two existing rows	Copy any populated row, insert blank in position, paste, clear

WHY THIS IS THE HEADLINE SECTION

This single workflow is the difference between a template that quietly breaks on you and one that just works. Every other support question buyers ask us either traces back to this — or to a missing ✓ in column F.

COMMON TASKS

Cheat sheet.

The five moves that cover 90% of edits after the bid is built.

TASK	HOW
Add a new line item	See the "How to add new rows" section. Copy → insert blank → paste → clear
Add a new category	Same method, but copy a ○ row. Add the category name in G11:G19 so it shows in the dropdown
Rename a category	Edit the name in G11:G19. Anywhere you used the old name in column O, re-pick from the dropdown
Exclude a line from the Estimate	Clear the ✓ in column F. The line still counts internally — it just doesn't print
Change markup on one line	Edit column X for that row. The rest of the bid is unaffected
Change markup on the whole bid	Use T14 (Profit Margin %) in the summary block. Applies on top of per-line markups
Bid a credit or owner deduction	Enter the unit cost as negative — e.g., -5000 . The math handles it

WHEN SOMETHING LOOKS OFF

Troubleshooting.

Six things that go wrong, and the one fix for each.

"MY LINE SHOWS ON THE BID CALCULATOR BUT NOT ON THE ESTIMATE."

Column F on that row is missing the ☐. Pick ☒ from the dropdown.

"A CATEGORY IN J11:J19 SHOWS \$0 EVEN THOUGH I HAVE LINE ITEMS UNDER IT."

No rows are tagged with that category in column O. Pick the category from the dropdown on each line item.

"MY MARKUP (\$) COLUMN IS BLANK FOR ONE LINE."

Column X (Markup %) is empty for that row. Set it — e.g., .

"MY LINE ITEM SUBTOTAL ISN'T CALCULATING."

That row was probably created by typing into a blank row past the demo data. Use the copy / insert / paste / clear method described on the previous spread.

"MY TOTAL BID PRICE (X10) HASN'T UPDATED."

Open the file in Excel — not Numbers, not Google Sheets — and press to force a recalc. Excel sometimes caches stale values when files come in from elsewhere.

"MY CONDITIONAL FORMATTING / DROPDOWNS DISAPPEARED."

The file was probably saved through Numbers or Google Sheets. Open the original BLANK template in Excel and copy your data into a fresh copy.

"I DELETED A FORMULA BY ACCIDENT."

Open a fresh copy of the BLANK template. Copy your inputs over — project header, then the rows you've built. The formulas regenerate themselves.

Remember

Copy the row. Insert a blank. Paste. Clear.

If you remember one thing from this guide, remember the four-step row method. That single workflow is the difference between a template that quietly breaks on you and one that just works.