HOW TO USE IT

Construction Bid Template

Price a job line by line, then print a client-ready Proposal and a Terms page with signature blocks. Plan on about an hour for your first one, less once Setup is done.

IN THE DOWNLOAD

Excel_ConstructionBidTemplate_SAMPLE.xlsx (a finished bid to learn from) and Excel_ConstructionBidTemplate_BLANK.xlsx (start every bid from this one)

WORKS IN

Excel 2021 or newer, including Microsoft 365, on Mac or Windows. Not Google Sheets or Numbers.

TABS

Setup, Bid Calculator, Proposal, Terms, Export

ONE FILE PER BID

Save a copy of the BLANK for each job you price

Before you start

The SAMPLE file is a finished bid: Northline Construction pricing a $1.8M retail shell. Click around in it and change a few numbers to see what moves. When you're ready to price your own job, **open the BLANK file and save a copy** named for the job. The BLANK has the same formulas, lists and terms, with every bid row empty and ready.

> **CAREFUL**
> Don't clear the sample with the Delete key. Selecting the sample rows and pressing Delete wipes the formulas along with the numbers, and the codes and totals stop working without saying why. Start from the BLANK instead.

A few things hold true on every tab:

- **Blue text is yours to type.** Black and gray text calculates. If a cell isn't blue, leave it alone.
- ◯ **starts a section,** ◆ **is a line inside it.** You pick them from the dropdown in the Type column. Every ◆ below a ◯ belongs to that section until the next ◯.
- **Codes number themselves.** 01 is the first section, 01.01 its first line. Insert a line and everything below renumbers.
- **Dates follow your computer's region.** In the US you type 11/5/26 for November 5. In the UK or Australia you type 5/11/26.

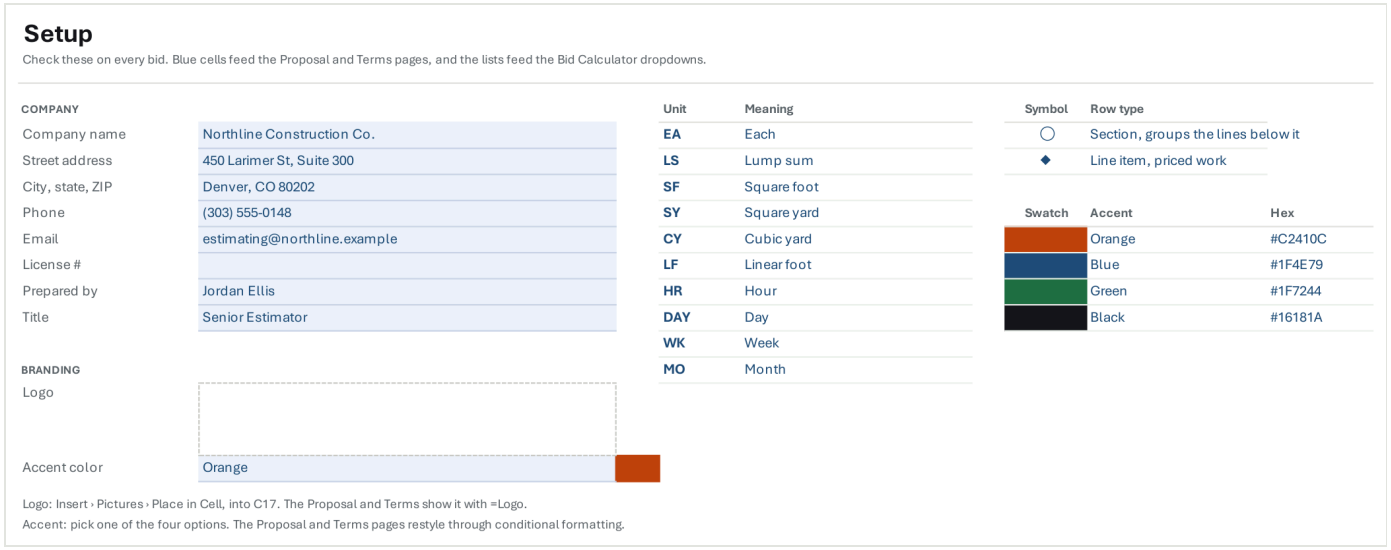
What's in the workbook

Tab	What it's for	Do you type here?
Setup	Your company details, logo and accent color. Fill it in once and keep it from bid to bid.	Yes, the blue boxes
Bid Calculator	Every line of the estimate: quantities, unit costs and markup. The bid price shows top right.	Yes, this is where the work happens
Proposal	The client-facing page. It fills itself in from the Bid Calculator.	Two boxes: client address and scope
Terms	Payment schedule, eight terms, acceptance wording and signature lines.	The milestones, shares and terms
Export	Your included lines, laid out to paste into the Schedule of Values and Job Costing templates once you win the job.	No

STEP 1

Fill in Setup (5 minutes)

Setup comes first because the Proposal and Terms pages pull your company block from it. You only do this once. After that, every bid you start from your own saved copy already has it.



Setup

Check these on every bid. Blue cells feed the Proposal and Terms pages, and the lists feed the Bid Calculator dropdowns.

COMPANY	
Company name	Northline Construction Co.
Street address	450 Larimer St, Suite 300
City, state, ZIP	Denver, CO 80202
Phone	(303) 555-0148
Email	estimating@northline.example
License #	
Prepared by	Jordan Ellis
Title	Senior Estimator

BRANDING	
Logo	
Accent color	Orange

Unit	Meaning
EA	Each
LS	Lump sum
SF	Square foot
SY	Square yard
CY	Cubic yard
LF	Linear foot
HR	Hour
DAY	Day
WK	Week
MO	Month

Symbol	Row type
○	Section, groups the lines below it
◆	Line item, priced work

Swatch	Accent	Hex
	Orange	#C2410C
	Blue	#1F4E79
	Green	#1F7244
	Black	#16181A

Logo: Insert › Pictures › Place in Cell, into C17. The Proposal and Terms show it with =Logo.
Accent: pick one of the four options. The Proposal and Terms pages restyle through conditional formatting.

Setup. Company details on the left, the lists behind the dropdowns on the right.

Cell	What to type
C7 to C11	Company name, street address, city/state/ZIP, phone, email
C12	License number, if your state wants it on a proposal
C13 and C14	Your name and title. They print under the contractor's signature line on the Terms page.
C17	Your logo. Click C17, then **Insert › Pictures › Place in Cell**. Until you add one, the print pages show "Your logo".
C18	Accent color: Orange, Blue, Green or Black. It colors the bid price and the rule across the top of the Proposal and Terms.

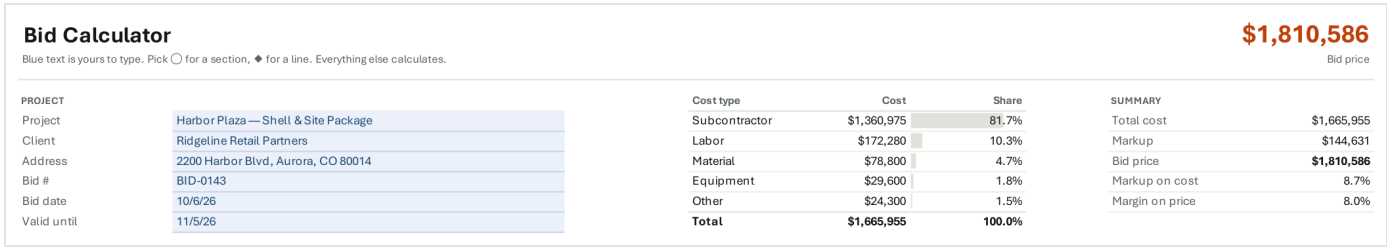
The **Units** list (EA, LS, SF, CY, LF, HR and so on) feeds the Unit dropdown. To add one, type it in the empty row right under the list and press Enter. Excel stretches the list to include it.

> TIP
>
> Once Setup is filled in, save that copy as your own starting file (for example "Bid - START HERE.xlsx"). Then each new bid is a Save As from it, and you never retype your company block.

STEP 2

Fill in the project box (2 minutes)

Open the **Bid Calculator**. The blue box at the top left holds the project details, and they flow to the Proposal and Terms.



Bid Calculator — $1,810,586 Bid price

Blue text is yours to type. Pick ◯ for a section, ◆ for a line. Everything else calculates.

PROJECT	
Project	Harbor Plaza — Shell & Site Package
Client	Ridgeline Retail Partners
Address	2200 Harbor Blvd, Aurora, CO 80014
Bid #	BID-0143
Bid date	10/6/26
Valid until	11/5/26

Cost type	Cost	Share
Subcontractor	$1,360,975	81.7%
Labor	$172,280	10.3%
Material	$78,800	4.7%
Equipment	$29,600	1.8%
Other	$24,300	1.5%
Total	**$1,665,955**	**100.0%**

SUMMARY	
Total cost	$1,665,955
Markup	$144,631
Bid price	**$1,810,586**
Markup on cost	8.7%
Margin on price	8.0%

The top of the Bid Calculator. Project box on the left, cost-type split in the middle, summary on the right.

Cell	Field	Example
E7	Project	Harbor Plaza, Shell & Site Package
E8	Client	Ridgeline Retail Partners
E9	Address	the job site address
E10	Bid #	BID-0143
E11	Bid date	10/6/26
E12	Valid until	11/5/26, usually 30 days out

Bid date and Valid until only take dates. Type anything else and Excel stops you with "Type a date."

STEP 3

Build the bid (15 to 45 minutes)

The table under the top band is the estimate. The BLANK has 486 empty rows ready, already formatted, with every formula in place. You just start typing in the first one.

Include	Type	Code	Description	Cost type	Qty	Unit	Unit cost	Cost	Markup	Markup $	Price
	○	**01**	**General Conditions**					**$177,300**		**$23,145**	**$200,445**
☑	◆	01.01	Superintendent	Labor	26	WK	$3,200.00	$83,200	15.0%	$12,480	$95,680
☑	◆	01.02	Project manager (50%)	Labor	26	WK	$1,900.00	$49,400	15.0%	$7,410	$56,810
☑	◆	01.03	Temporary facilities & toilets	Equipment	6	MO	$1,450.00	$8,700	10.0%	$870	$9,570
☑	◆	01.04	Dumpsters, 30 yd	Equipment	18	EA	$650.00	$11,700	10.0%	$1,170	$12,870
☑	◆	01.05	Builder's risk insurance	Other	1	LS	$9,800.00	$9,800	5.0%	$490	$10,290
☑	◆	01.06	Permits & fees	Other	1	LS	$14,500.00	$14,500	5.0%	$725	$15,225
	○	**02**	**Site Work**					**$404,200**		**$32,336**	**$436,536**
☑	◆	02.01	Clearing & erosion control	Subcontractor	1	LS	$38,000.00	$38,000	8.0%	$3,040	$41,040
☑	◆	02.02	Mass grading	Subcontractor	6,800	CY	$9.50	$64,600	8.0%	$5,168	$69,768
☑	◆	02.03	Storm drainage	Subcontractor	1	LS	$142,000.00	$142,000	8.0%	$11,360	$153,360
☑	◆	02.04	Asphalt paving	Subcontractor	4,200	SY	$38.00	$159,600	8.0%	$12,768	$172,368
☐	◆	02.05	Sanitary sewer tap (option)	Subcontractor	1	LS	$42,000.00	$42,000	8.0%	$3,360	$45,360
	○	**03**	**Concrete**					**$236,300**		**$19,760**	**$256,060**
☑	◆	03.01	Footings & foundation walls	Subcontractor	1	LS	$96,500.00	$96,500	8.0%	$7,720	$104,220
☑	◆	03.02	Slab on grade, 5 in	Subcontractor	18,500	SF	$6.40	$118,400	8.0%	$9,472	$127,872
☑	◆	03.03	Rebar & mesh	Material	1	LS	$21,400.00	$21,400	12.0%	$2,568	$23,968
☐	◆	03.04	Polished concrete finish (option)	Subcontractor	18,500	SF	$2.10	$38,850	8.0%	$3,108	$41,958

The bid table in the sample. Section rows are shaded and add up their lines. The unticked line 02.05 is an option, so it's gray and left out of the bid.

Work across each row from left to right:

Column	What to do
Include	Already ticked on every empty row. Untick a line to leave it out of the bid price and the Proposal. That's how you handle options and alternates.
Type	Pick ○ to start a section (Site Work, Concrete) or ◆ for a priced line inside it.
Description	What the line is. Keep it readable: the client sees it on the Proposal.
Cost type	Subcontractor, Labor, Material, Equipment or Other. It drives the split at the top.
Qty	How many. For a lump sum, leave Qty empty: an empty Qty counts as 1.
Unit	From the dropdown: EA, LS, SF, CY, HR, DAY and the rest of your Units list.
Unit cost	Your cost per unit, before markup. A negative number works for a credit or a deduct.
Markup	Type it as a percent: `15%`. Each line has its own, so subs can carry 8% while self-performed labor carries 15%.

On a ○ row you only need Type and Description. The section's Cost, Markup $ and Price add up the ticked lines below it, down to the next ○.

Here's what the first two lines of a new bid look like in the BLANK. The code, Cost, Markup $ and Price filled in by themselves:

Include	Type	Code	Description	Cost type	Qty	Unit	Unit cost	Cost	Markup	Markup $	Price
	○	**01**	**Demolition**					**$2,000**		**$268**	**$2,268**
☑	◆	01.01	Demo crew	Labor	3	DAY	$450.00	$1,350	15.0%	$203	$1,553
☑	◆	01.02	Dumpster, 20 yd	Equipment		LS	$650.00	$650	10.0%	$65	$715
☑											
☑											

A section and two lines typed into the BLANK. The dumpster line has no Qty, so it prices as a lump sum.

What fills itself in

Column	What it shows
Code	01, 01.01, 01.02 and so on, from the row order
Cost	Qty × Unit cost on a line. The total of its ticked lines on a section.
Markup $	Cost × Markup on a line. The total of its ticked lines on a section.
Price	Cost + Markup $. This is what the client sees.

Read the top band before you send anything

The top band updates as you type, so it doubles as your sanity check.

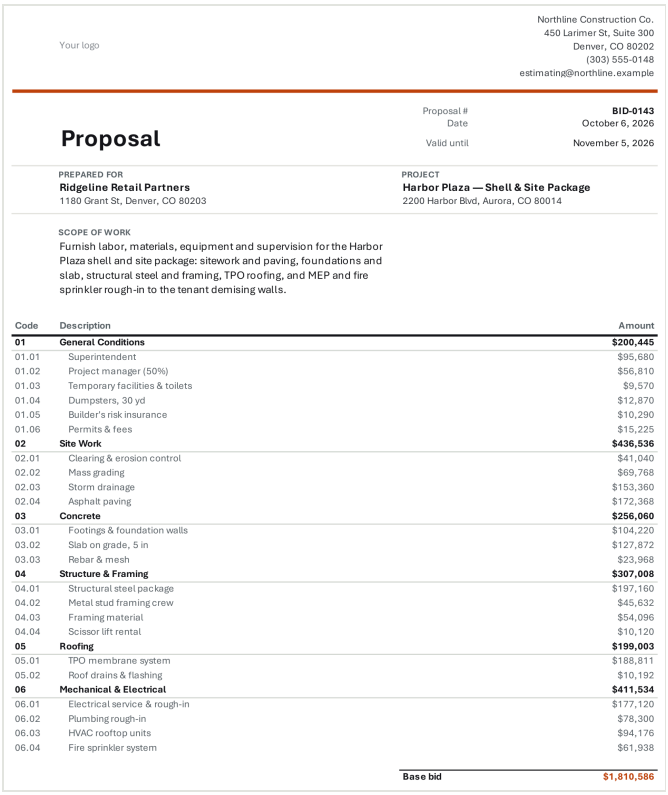
- **Cost type split** (G7 to J12) shows how much of the cost is subs, labor, material, equipment and other, with a bar for each share. If labor is 2% on a job you're self-performing, something's missing.
- **Total cost** (M7) is what the work costs you. **Markup** (M8) is what you add. **Bid price** (M9) is the number you quote, and it repeats big and orange at the top right.
- **Markup on cost** (M10) and **Margin on price** (M11) are the same dollars measured two ways. On the sample, $144,631 of markup is 8.7% on top of cost but only 8.0% of the price. If your target is a margin, read M11.

STEP 4

Finish the Proposal (5 minutes)

The Proposal is the page your client reads. It pulls your logo and company block from Setup, the project details from the Bid Calculator and every included line with its price. Only two things get typed here:

Cell	What to type
B12	The client's mailing address
B16	The scope of work: a short paragraph on what's included



Your logo

Northline Construction Co.
450 Larimer St, Suite 300
Denver, CO 80202
(303) 555-0148
estimating@northline.example

Proposal

Proposal # BID-0143
Date October 6, 2026
Valid until November 5, 2026

PREPARED FOR
Ridgeline Retail Partners
1180 Grant St, Denver, CO 80203

PROJECT
Harbor Plaza — Shell & Site Package
2200 Harbor Blvd, Aurora, CO 80014

SCOPE OF WORK
Furnish labor, materials, equipment and supervision for the Harbor Plaza shell and site package: sitework and paving, foundations and slab, structural steel and framing, TPO roofing, and MEP and fire sprinkler rough-in to the tenant demising walls.

Code	Description	Amount
01	**General Conditions**	**$200,445**
01.01	Superintendent	$95,680
01.02	Project manager (50%)	$56,810
01.03	Temporary facilities & toilets	$9,570
01.04	Dumpsters, 30 yd	$12,870
01.05	Builder's risk insurance	$10,290
01.06	Permits & fees	$15,225
02	**Site Work**	**$436,536**
02.01	Clearing & erosion control	$41,040
02.02	Mass grading	$69,768
02.03	Storm drainage	$153,360
02.04	Asphalt paving	$172,368
03	**Concrete**	**$256,060**
03.01	Footings & foundation walls	$104,220
03.02	Slab on grade, 5 in	$127,872
03.03	Rebar & mesh	$23,968
04	**Structure & Framing**	**$307,008**
04.01	Structural steel package	$197,160
04.02	Metal stud framing crew	$45,632
04.03	Framing material	$54,096
04.04	Scissor lift rental	$10,120
05	**Roofing**	**$199,003**
05.01	TPO membrane system	$188,811
05.02	Roof drains & flashing	$10,192
06	**Mechanical & Electrical**	**$411,534**
06.01	Electrical service & rough-in	$177,120
06.02	Plumbing rough-in	$78,300
06.03	HVAC rooftop units	$94,176
06.04	Fire sprinkler system	$61,938

Base bid **$1,810,586**

The sample Proposal. It prints on one page and ends at the Base bid.

The line list grows and shrinks with your bid. Unticked lines drop out, and so does any section with nothing ticked. The list always ends with **Base bid**, which equals the bid price on the Bid Calculator.

Section totals only. Some clients shouldn't see your line-by-line pricing. Untick **Show line items** (the checkbox in F5, just right of the page) and the Proposal shows one row per section. It still adds up to the same Base bid.

Code	Description	Amount
01	**General Conditions**	**$200,445**
02	**Site Work**	**$436,536**
03	**Concrete**	**$256,060**
04	**Structure & Framing**	**$307,008**
05	**Roofing**	**$199,003**
06	**Mechanical & Electrical**	**$411,534**

Base bid **$1,810,586**

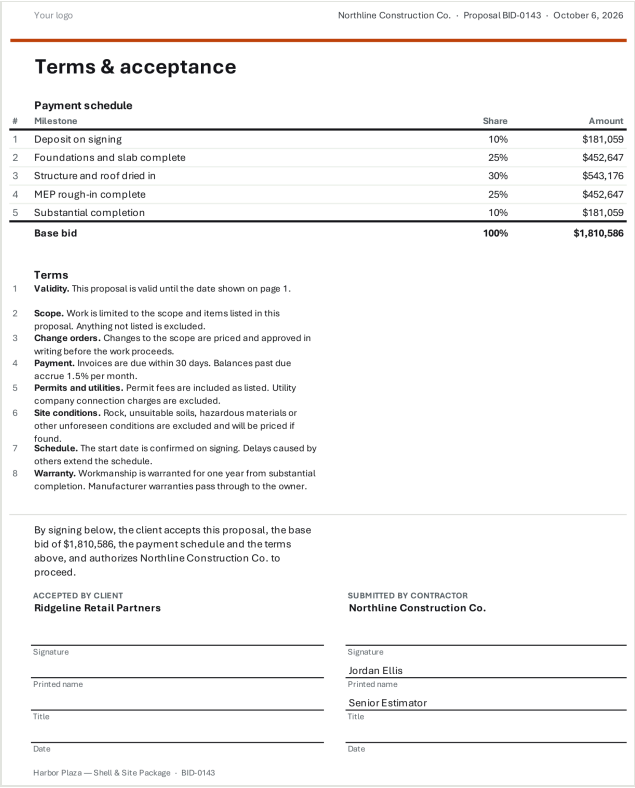
The same Proposal with Show line items off.

> **GOOD TO KNOW**
>
> Unticked options never print. If you want the client to see an option and its price, mention it in the scope paragraph (B16), for example "Option: polished concrete finish, add $42,400."

STEP 5

Set the payment schedule and terms (5 minutes)

The **Terms** tab is the last page of the package and the one the client signs.



Your logo — Northline Construction Co. · Proposal BID-0143 · October 6, 2026

Terms & acceptance

Payment schedule

#	Milestone	Share	Amount
1	Deposit on signing	10%	$181,059
2	Foundations and slab complete	25%	$452,647
3	Structure and roof dried in	30%	$543,176
4	MEP rough-in complete	25%	$452,647
5	Substantial completion	10%	$181,059
	Base bid	**100%**	**$1,810,586**

Terms

1 **Validity.** This proposal is valid until the date shown on page 1.

2 **Scope.** Work is limited to the scope and items listed in this proposal. Anything not listed is excluded.

3 **Change orders.** Changes to the scope are priced and approved in writing before the work proceeds.

4 **Payment.** Invoices are due within 30 days. Balances past due accrue 1.5% per month.

5 **Permits and utilities.** Permit fees are included as listed. Utility company connection charges are excluded.

6 **Site conditions.** Rock, unsuitable soils, hazardous materials or other unforeseen conditions are excluded and will be priced if found.

7 **Schedule.** The start date is confirmed on signing. Delays caused by others extend the schedule.

8 **Warranty.** Workmanship is warranted for one year from substantial completion. Manufacturer warranties pass through to the owner.

By signing below, the client accepts this proposal, the base bid of $1,810,586, the payment schedule and the terms above, and authorizes Northline Construction Co. to proceed.

ACCEPTED BY CLIENT
Ridgeline Retail Partners

Signature
Printed name
Title
Date

SUBMITTED BY CONTRACTOR
Northline Construction Co.

Signature
Printed name: Jordan Ellis
Title: Senior Estimator
Date

Harbor Plaza — Shell & Site Package · BID-0143

The Terms page in the sample.

Payment schedule (rows 9 to 13). Type up to five milestones in column B and the share of the bid due at each in column E (`10%` , `25%`). Amounts calculate from the bid price. The shares have to add up to 100%. If they don't, the total turns red and "Shares must add up to 100%" appears under it.

Terms (rows 18 to 25). Eight sample terms cover validity, scope, change orders, payment, permits and utilities, site conditions, schedule and warranty. Click a term and edit the text in the formula bar. They're written as plain-English samples, so have your own reviewed for your state before you rely on them.

The rest of the page fills itself in, including the acceptance sentence with the base bid in it and both names over the signature lines.

STEP 6

Print the package

Print the **Proposal and Terms together** so the page numbers run as one document (Page 1 of 2, Page 2 of 2):

1. Click the Proposal tab, then hold **Cmd** (Mac) or **Ctrl** (Windows) and click the Terms tab. Both tabs are now selected.
2. Choose **File › Print** and print the active sheets, or save them as a PDF to email.
3. Click any other tab to unselect them. While two tabs are selected, anything you type lands on both.

Printing stops at the Base bid row by itself, so a long bid runs onto extra pages without you adjusting anything. Every page carries "Page x of y" in its footer, and the Proposal pages add a note that terms and signatures are on the last page.

The Bid Calculator prints too, landscape and one page wide, stopping at your last typed line. Keep that copy for your files. It shows your costs and markup, so it shouldn't go to the client.

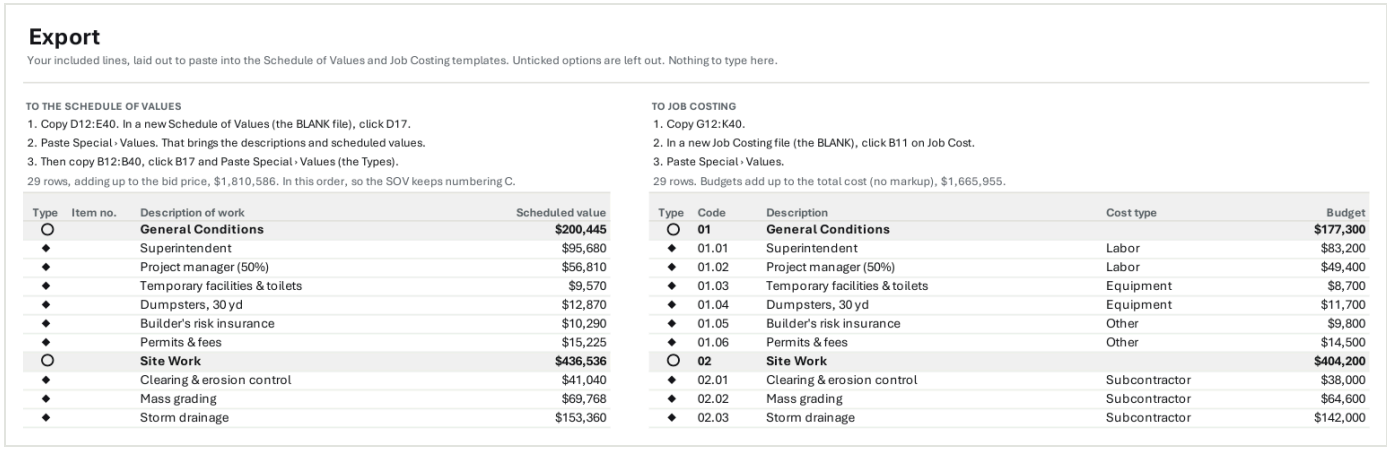
Ship-it checklist

1. Bid price (Bid Calculator M9) looks right against what you expected the job to cost.
2. No red cells anywhere on the Bid Calculator.
3. The options you meant to leave out are unticked, and nothing else is.
4. Proposal: client address, scope, bid number and the Valid until date are right.
5. Terms: shares add up to 100% and the terms match how you work.

STEP 7

After you win the job

The **Export** tab lists every included line in the column order the Schedule of Values and Job Costing templates expect, so you never retype the bid. Unticked options stay out.



Export

Your included lines, laid out to paste into the Schedule of Values and Job Costing templates. Unticked options are left out. Nothing to type here.

TO THE SCHEDULE OF VALUES

1. Copy D12:E40. In a new Schedule of Values (the BLANK file), click D17.
2. Paste Special › Values. That brings the descriptions and scheduled values.
3. Then copy B12:B40, click B17 and Paste Special › Values (the Types).

29 rows, adding up to the bid price, $1,810,586. In this order, so the SOV keeps numbering C.

Type	Item no.	Description of work	Scheduled value
○		**General Conditions**	**$200,445**
◆		Superintendent	$95,680
◆		Project manager (50%)	$56,810
◆		Temporary facilities & toilets	$9,570
◆		Dumpsters, 30 yd	$12,870
◆		Builder's risk insurance	$10,290
◆		Permits & fees	$15,225
○		**Site Work**	**$436,536**
◆		Clearing & erosion control	$41,040
◆		Mass grading	$69,768
◆		Storm drainage	$153,360

TO JOB COSTING

1. Copy G12:K40.
2. In a new Job Costing file (the BLANK), click B11 on Job Cost.
3. Paste Special › Values.

29 rows. Budgets add up to the total cost (no markup), $1,665,955.

Type	Code	Description	Cost type	Budget
○	**01**	**General Conditions**		**$177,300**
◆	01.01	Superintendent	Labor	$83,200
◆	01.02	Project manager (50%)	Labor	$49,400
◆	01.03	Temporary facilities & toilets	Equipment	$8,700
◆	01.04	Dumpsters, 30 yd	Equipment	$11,700
◆	01.05	Builder's risk insurance	Other	$9,800
◆	01.06	Permits & fees	Other	$14,500
○	**02**	**Site Work**		**$404,200**
◆	02.01	Clearing & erosion control	Subcontractor	$38,000
◆	02.02	Mass grading	Subcontractor	$64,600
◆	02.03	Storm drainage	Subcontractor	$142,000

The Export tab. The steps at the top update with the exact range to copy.

To the Schedule of Values (bills the client, so it uses the price with markup):

1. On Export, copy the range shown in step 1 (D12 down to the last row).

2. In a new Schedule of Values BLANK, click D17 on the Schedule of Values tab and choose **Paste Special › Values**.
3. Back on Export, copy column B (the Types), click B17 in the Schedule of Values and **Paste Special › Values** again.

Do the two pastes in that order. The Schedule of Values numbers its own items in column C, and this order never touches it.

To Job Costing (tracks your costs, so it uses cost without markup as the budget):

1. On Export, copy the range shown (G12 to K, down to the last row).
2. In a new Job Costing BLANK, click B11 on the Job Cost tab and choose **Paste Special › Values**.

Section totals arrive as plain numbers. They stay quiet while they match their lines. If you change lines later and a section stops matching, it turns red; the guide that comes with each template shows how to put the formula back.

> **ALWAYS PASTE SPECIAL › VALUES, NEVER A NORMAL PASTE**
> Everything on Export is a formula. A normal paste (Command+V or Ctrl+V) brings the formulas across instead of their results, and the other template shows a data validation error or a #SPILL! error. If that happens, undo (Command+Z or Ctrl+Z) and paste again with Paste Special › Values. On a Mac, Paste Special is Control+Command+V; on Windows, Ctrl+Alt+V. Pick **Values**, then **OK**.

Adding, moving and removing lines

At the end of the bid: type in the next empty row. It's already formatted, ticked and full of formulas.

In the middle of a section: right-click a line, choose **Insert › Table Rows Above** and fill in the new row. Everything below renumbers. A row inserted this way comes in **unticked**, so tick Include once you've filled it in.

Past the last ready-made row (row 500): select the cells of row 500 from Include across to Price (B500 to M500). Press **Cmd+C** (Mac) or **Ctrl+C** (Windows), select as many rows below it as you need, and press **Cmd+V** or **Ctrl+V**. The table grows to take them in, with every formula, dropdown and checkbox. The new rows are copies of row 500, so if it already has a line in it, type over the copies. For just one more row, you can also click the Price cell on row 500 and press **Tab**. That row comes in unticked, so tick its Include box. Don't type in the rows under the table: Excel pulls them in but skips the formatting.

> **CAREFUL**
> Select the cells, not the row number on the left. If you copy the whole sheet row and paste it below, the table stays at row 500 and the formulas land outside it.

Removing a line: right-click it and choose **Delete › Table Rows**. The codes close up and the totals update. If you might want the line back, untick Include instead.

Moving a line: insert a row where you want it, copy the blue cells across from the old row, then delete the old row.

> **CAREFUL**
>
> Don't sort the bid table. Sections are built from row order, so sorting by description or price scrambles the codes, the section totals and the Proposal. If you sort by accident, undo right away with **Cmd+Z** (Mac) or **Ctrl+Z** (Windows).

Cells that calculate (don't type over them)

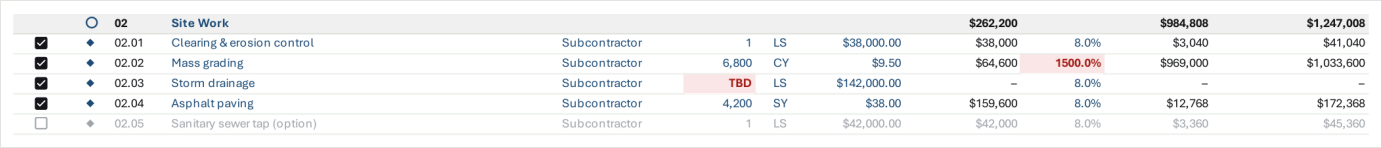
These cells hold formulas. Typing over one or pressing Delete on it breaks that cell, and sometimes everything that depends on it.

Tab	Formula cells
Bid Calculator	Bid price (M2), the cost-type split (I7:J12), the summary (M7:M11), and the Code, Cost, Markup $ and Price columns of the table
Proposal	Everything except the client address (B12), scope (B16) and the Show line items box (F5)
Terms	The payment Amount column (F), the share total (E14), the acceptance sentence and every name under the signature lines
Export	All of it

If you break one, undo right away. If it's too late for that, copy the same column's cell from an empty row lower in the table and paste it over the broken one. Every row in the table carries the same formulas.

Red cells and what they mean

A red cell is the workbook telling you a number isn't one it can use. Fix the cell and the red goes away.



	○	**02**	**Site Work**					**$262,200**		**$984,808**	**$1,247,008**
☑	◆	02.01	Clearing & erosion control	Subcontractor	1	LS	$38,000.00	$38,000	8.0%	$3,040	$41,040
☑	◆	02.02	Mass grading	Subcontractor	6,800	CY	$9.50	$64,600	1500.0%	$969,000	$1,033,600
☑	◆	02.03	Storm drainage	Subcontractor	TBD	LS	$142,000.00	–	8.0%	–	–
☑	◆	02.04	Asphalt paving	Subcontractor	4,200	SY	$38.00	$159,600	8.0%	$12,768	$172,368
☐	◆	02.05	Sanitary sewer tap (option)	Subcontractor	1	LS	$42,000.00	$42,000	8.0%	$3,360	$45,360

Two problems in the sample: a markup typed as 15 instead of 15%, and TBD in a Qty.

What you see	What happened	Fix
`1500.0%` in Markup	A markup over 100%, usually 15 typed or pasted instead of 15%.	Type `15%`.
`TBD` in Qty, Unit cost or Markup	Text where a number belongs. The line prices at $0 until it's fixed.	Type the number, or leave it empty until you have one.
Red in Type	Something other than ◯ or ◆, often a pasted "◆ " with a stray space. The line isn't counted.	Pick ◯ or ◆ from the dropdown.
Red share total on Terms	The payment shares don't add up to 100%.	Adjust the shares in column E.

When you type, Excel blocks most of these with a message ("Type the markup as a percent, for example 12%."). Pasting skips those checks, which is why the red cells are there.

Troubleshooting

A line shows on the Bid Calculator but not on the Proposal. Its Include box is unticked, or Show line items is off on the Proposal (F5).

A line is gray. It's unticked, so it isn't counted. Tick Include.

The section total doesn't match its lines. Check that every line is ◆ and ticked, and that no line in the section has a red cell.

The codes or the Proposal look scrambled. The table was probably sorted. Undo, or start again from a copy of your last saved version.

A date shows as text or the wrong month. Dates follow your computer's region. On a day-first setting, 5/11/26 is the 5th of November.

The Proposal prints extra blank pages or cuts off lines. Someone set a print area in Page Layout, which replaces the automatic one. The help notes to the right of the Proposal (column G) show the formula to put back in **Formulas › Name Manager**, under Print_Area.

Codes or totals show #NAME?. Your Excel is older than the template needs. It works in Excel 2021 or newer and in Microsoft 365, on Mac or Windows. Excel 2019 and older don't have the functions it uses.

Checkboxes show TRUE or FALSE. Your Excel doesn't draw checkboxes inside cells. Everything still works: type TRUE in a cell to tick it and FALSE to untick it.

Cheat sheet

I want to...	Do this
Start a new bid	Open the BLANK (or your saved starting file) and Save As a new name
Add an option the client can accept	Price it as a line, untick Include, and mention it in the Proposal scope
Price a lump sum	Leave Qty empty and type the price in Unit cost
Give a credit	Type a negative Unit cost
Hide my line pricing from the client	Untick Show line items on the Proposal (F5)
Add sales tax	Add a ◆ line, Cost type Other, the tax amount in Unit cost and 0% markup
Change my logo or color	Setup C17 and C18
Start the Schedule of Values or Job Costing	Use the Export tab, Step 7