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PRINTABLE WORKSHEETS / EXCEL AND GOOGLE SHEETS COMPANION

Field Service Job Costing Template

Company: _____ Currency: _____ Period: _____

Prepared by: _____ Reviewed by: _____

Use the worksheets in this order

01 Rates - calculate the cost of a technician hour and optional overhead.

02 Job cost sheet - compare the estimate with the actual cost of one job.

03 Job log - record completed jobs and keep fixed-fee work separate.

04 Contract P&L - compare the fixed fee with all covered work.

05 Summary - review margins, callbacks and actions for the next period.

Before you start

Use parts at purchase cost. Put any markup on the revenue side.

Include travel, return visits and other direct costs on the original job.

For fixed-fee work, leave job-level revenue blank; recognize the fee once in Contract P&L.

Exclude tax from costs and revenue where it is recoverable; apply your own accounting policy.

Keep overhead separate from direct costs and use the same treatment every period.

Key calculations

Job cost = (on-site hours + travel hours) x loaded rate + parts + other direct costs

Gross profit = revenue - direct cost; gross margin % = gross profit / revenue x 100

Net contribution = gross profit - allocated overhead

If revenue is zero or blank, leave margin % blank.

How this PDF works

Print or annotate these worksheets. Totals and percentages are calculated manually.

Copy the Job cost sheet and Job log pages whenever you need more space.

Pages 7 and 8 contain illustrative worked examples, separate from the blank worksheets.

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SET ONCE, THEN REVIEW WHEN PAYROLL OR RUNNING COSTS CHANGE

01 / Rates

Company: _____ Technician grade: _____ Currency: _____

Annual cost inputs	Amount
Gross annual wage	_____
Employer contributions and other non-wage costs	_____
Van: lease, fuel, insurance and servicing	_____
Tools, PPE, phone, training and certifications	_____
A. Total annual technician cost	_____
Annual hours	**Hours**
Paid hours (hours per week x paid weeks)	_____
Less leave, holidays, sickness and training	_____
B. Available hours	_____
C. Hours logged to work orders, including travel	_____
Available hours not logged to jobs (B - C)	_____
LOADED HOURLY RATE = A / C	_____

Use logged hours, rather than all paid hours, to recover the cost of unlogged time.

Optional overhead

Annual overhead pool (office, dispatch, premises, software)	_____
Total logged hours across all technicians	_____
OVERHEAD RATE = overhead pool / total logged hours	_____

Count each cost once. Do not include the same unlogged time in both rates.

Pricing settings

Parts markup %: _____ Minimum callout: _____ Included hours: _____

Client price sheet / exceptions: _____

Rate valid from: _____ Next review: _____

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ONE JOB / ESTIMATE AGAINST ACTUAL

02 / Job Cost Sheet

Job ID: _____ Date: _____ Contract ID: _____

Client / site: _____ Asset: _____

Job type: _____ Technician / grade: _____

Billing basis: [ ] Quoted [ ] Time and materials [ ] Fixed fee [ ] Warranty

Loaded rate: _____ Overhead rate: _____ Quote / invoice ref: _____

Cost line	Estimate	Actual
On-site hours	_____	_____
Travel hours	_____	_____
Labor + travel cost: total hours x loaded rate	_____	_____
Parts at purchase cost	_____	_____
Consumables and sundries	_____	_____
Subcontractor charges	_____	_____
Other direct costs	_____	_____
TOTAL DIRECT COST	_____	_____
Revenue excluding tax	_____	_____
GROSS PROFIT = revenue - direct cost	_____	_____
GROSS MARGIN % = gross profit / revenue x 100	_____	_____
Allocated overhead: total hours x overhead rate	_____	_____
NET CONTRIBUTION = gross profit - overhead	_____	_____

Direct-cost variance = actual - estimate: _____ Positive = over estimate.

Return visits

Number: _____ Reason: _____ Extra cost included above: _____

Include return-visit hours and parts in the lines above. Do not add their cost twice.

For fixed-fee jobs, leave revenue, profit and margin blank here; use Contract P&L.

Notes / follow-up: _____

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COPY THIS PAGE AS NEEDED / ONE RECORD PER COMPLETED JOB

03 / Job Log

Company: _____ Period: _____ Currency: _____

Record revenue only for separately billed jobs. Fixed-fee jobs carry cost only.

Record 1

Job / date: _____ Client / site: _____ Contract: _____

Type / asset: _____ Billing basis: _____ Technician: _____

On-site h: _____ Travel h: _____ Loaded rate: _____ Labor + travel: _____

Parts: _____ Consumables: _____ Subcontractors: _____ Other: _____ Direct cost: _____

Revenue: _____ Gross profit: _____ Margin %: _____ Overhead: _____ Net: _____

Return visits / reason: _____ Quote cost / variance: _____

Record 2

Job / date: _____ Client / site: _____ Contract: _____

Type / asset: _____ Billing basis: _____ Technician: _____

On-site h: _____ Travel h: _____ Loaded rate: _____ Labor + travel: _____

Parts: _____ Consumables: _____ Subcontractors: _____ Other: _____ Direct cost: _____

Revenue: _____ Gross profit: _____ Margin %: _____ Overhead: _____ Net: _____

Return visits / reason: _____ Quote cost / variance: _____

Record 3

Job / date: _____ Client / site: _____ Contract: _____

Type / asset: _____ Billing basis: _____ Technician: _____

On-site h: _____ Travel h: _____ Loaded rate: _____ Labor + travel: _____

Parts: _____ Consumables: _____ Subcontractors: _____ Other: _____ Direct cost: _____

Revenue: _____ Gross profit: _____ Margin %: _____ Overhead: _____ Net: _____

Return visits / reason: _____ Quote cost / variance: _____

Reconcile weekly

Source work orders checked: [ ] Parts cost checked: [ ] Fixed-fee coding checked: [ ]

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FIXED-FEE WORK / COMPARE THE SAME PERIOD AND SCOPE

04 / Contract P&L

Client / contract: _____ Site(s): _____

Period: _____ Currency: _____ Monthly fee: _____

Coverage / exclusions: _____

Covered cost line	Assumed	Actual
Planned maintenance - labor and travel	_____	_____
Reactive callouts - labor and travel	_____	_____
Return visits - all direct costs	_____	_____
Parts included in the fee	_____	_____
Consumables included in the fee	_____	_____
Subcontractor charges	_____	_____
Other direct costs	_____	_____
TOTAL COVERED DIRECT COST	_____	_____
Fixed fee for the period	_____	_____
GROSS PROFIT ON FEE	_____	_____
GROSS MARGIN ON FEE %	_____	_____
Allocated overhead	_____	_____
NET CONTRIBUTION ON FEE	_____	_____

Cost variance = actual - assumed: _____ Extra cost / original assumption: _____ %

Quoted extras - record separately

Extras revenue: _____ Extras direct cost: _____ Extras gross profit: _____

Total account revenue = fixed fee + extras revenue: _____

Total account direct cost = covered cost + extras cost: _____

Total account gross profit: _____ Account gross margin %: _____

Visit checks: PM hours _____ Callouts _____ Reactive hours _____ Return visits _____

Do not count return costs again if already included in another covered-cost line.

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MONTHLY / COMPARE LIKE-FOR-LIKE WORK

05 / Summary and Review

Company: _____ Period: _____ Reviewer: _____

Performance snapshot

Revenue: _____ Direct cost: _____ Gross profit: _____ Margin %: _____

Allocated overhead: _____ Net contribution: _____ Net margin %: _____

Completed jobs: _____ Return visits: _____ Return-visit cost: _____

Fixed-fee revenue comes from Contract P&L once. Do not add it again at job level.

Margin by job type, client or contract

Group	Revenue	Gross profit	Margin %
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Ten lowest-margin jobs - separately billed jobs only

Job ID / margin	Job ID / margin	Job ID / margin	Job ID / margin	Job ID / margin
1. _____	2. _____	3. _____	4. _____	5. _____
6. _____	7. _____	8. _____	9. _____	10. _____

Review fixed-fee contracts separately using the margin on the fee.

What needs attention?

[ ] Quote labor assumptions [ ] Travel [ ] Repeat faults [ ] Unbilled parts [ ] Contract scope

Action	Owner	Due
_____	_____	_____
_____	_____	_____
_____	_____	_____

Decision at renewal / next review: _____

Worked Example / Rates and One Job

Loaded rate

Wage 42,000 + employer costs 10,500 + van 12,000 + tools / training 3,000 = EUR 67,500.
2,080 paid hours - 360 unavailable hours = 1,720 available hours.
1,165 hours logged to work orders; 555 other available hours still need covering.
EUR 67,500 / 1,165 = EUR 57.94; this example uses a rounded EUR 58/hour.
Dividing by 2,080 paid hours gives EUR 32.45, about 44% below the loaded rate.

Chiller fan motor replacement

Cost line	Estimate	Actual
On-site labor	3 h x 58 = 174	3.5 h x 58 = 203
Travel	1 h x 58 = 58	1.5 h x 58 = 87
Fan motor at purchase cost	640	640
Express delivery	0	45
Consumables and sundries	25	25
TOTAL DIRECT COST	897	1,000
Revenue	1,450	1,450
GROSS PROFIT	553	450
GROSS MARGIN	38.1%	31.0%

Actual direct cost exceeded the estimate by EUR 103, or 11.5%.
The actual hours include both visits. Do not add another return-visit cost.

Optional overhead example

EUR 310,000 / (14 technicians x 1,165 logged hours) = about EUR 19/hour.
Using the rounded rate: 5 total job hours x EUR 19 = EUR 95 overhead.
Actual net contribution = EUR 450 - EUR 95 = EUR 355; net margin = 24.5%.
Use full-precision rates in a spreadsheet; round figures for display.

Worked Example / Fixed-Fee Contract

Quarterly fixed fee: 3 months x EUR 6,500 = EUR 19,500.

Covered cost line	Assumed	Actual
Planned maintenance (on site + travel)	6,960	8,700
Reactive callouts (labor + travel)	3,480	5,568
Return visits	0	870
Consumables	1,800	2,350
Subcontracted water hygiene sampling	1,200	1,200
TOTAL COVERED DIRECT COST	13,440	18,688
Fixed fee	19,500	19,500
GROSS PROFIT ON FEE	6,060	812
GROSS MARGIN ON FEE	31.1%	4.2%

Costs increased by EUR 5,248. The quarterly fee did not change.

Operational assumptions

PM work: 120 hours assumed; 150 actual. Rate: EUR 58/hour.

Reactive work: 30 callouts / 60 hours assumed; 48 callouts / 96 hours actual.

Return visits: six visits / 15 hours actual, costed separately at EUR 870.

Quoted extras and the whole account

Extras revenue EUR 4,200 - extras direct cost EUR 3,190 = EUR 1,010 gross profit.

Total account revenue: EUR 23,700. Total account direct cost: EUR 21,878.

Total account gross profit: EUR 1,822. Gross margin: 7.7%.

Review prompt

Building C generated 26 of 48 callouts and four of six return visits.

Consider repricing that building, narrowing the fixed-fee scope or replacing repeat-fault assets.

Record the decision, owner and due date on the Summary and Review worksheet.