Metal Surcharge Tracker

How-to guide: what the workbook does, how to use it and what every number means. mfgcalcs.com

Metal Surcharge Tracker

Log monthly metal surcharges and each job's metal buy, and see the change against every quote, what to bill and what you absorbed.

For: Estimators, buyers and owners of fabrication shops, machine shops, foundries and metal importers who pay monthly metal surcharges.

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Quick start

1. On Setup, type your company name, currency and the weight unit your surcharges are quoted per, then replace the example grades and customers.
2. On Surcharge Rates, add one row per grade each month with the surcharge your supplier publishes or invoices.
3. On Job Log, add one row per job and grade: weight, quote date, buy date once the metal is bought, and whether the customer's terms pass the surcharge through. Read the Check column: anything other than OK names the gap.
4. Open the Dashboard to see the change against your quotes, what to bill, what you absorbed and what the jobs not yet bought would add; filter by customer, grade or quote dates.

What is in the workbook

Start Here	Read this first: what the workbook does and how to use it.
Setup	Your company, currency, weight unit and the lists the dropdowns read.
Surcharge Rates	One row per grade per month: the surcharge your supplier publishes or invoices, per weight unit.
Job Log	One row per job and grade: when it was quoted and bought, the weight, and whether the customer's terms pass the surcharge through.
Dashboard	What the metal surcharge cost against your quotes, what to bill and what you absorbed, for the customer, grade and quote dates you choose.
Method	How every number is calculated, with assumptions, limits and sources.
Verify	Self-check: the workbook's formulas recomputed on fixed inputs against an independent reference.
About MFG Calcs	Everything MFG Calcs offers, free: calculators, templates, tariff tools, data and the Calkee AI helper.

What each number means

Quantity	How it is calculated	Units
Quoted rate	The published rate for the grade in the month of the quote date (Surcharge Rates).	currency/lb or kg

Quantity	How it is calculated	Units
Rate used	The invoiced rate when one is typed; else the published rate in the month of the buy date; else, for a job not bought yet, the latest published rate for the grade.	currency/lb or kg
Change	Weight x (rate used - quoted rate), for jobs bought: the Metal Surcharge Impact calculator's cost change. Surcharge paid = weight x rate used; quoted surcharge = weight x quoted rate.	currency
To bill and absorbed	The change on jobs with a surcharge clause (to bill; negative = a credit owed) and on jobs without one (absorbed; negative = a saving kept).	currency
Not yet billed	To bill on jobs with no Billed on date. The Dashboard lists the largest first.	currency
Open exposure	For jobs not bought yet: weight x (latest published rate - quoted rate). A what-if at today's rate, not a forecast.	currency
Paid and quoted rate	Surcharge paid (or quoted surcharge) / weight, over jobs bought with both rates: weighted by weight.	currency/lb or kg

Assumptions, limitations, sources and the self-check (the Verify sheet, which recomputes the workbook's formulas on fixed test inputs) are in the workbook. The last page shows the Dashboard with the example data for Thornaby Fabrication, a fictional business.

Free from MFG Calcs - keep this credit when you share it.

Engineering estimates for planning and improvement work. Verify the results against your own process, data and standards before you rely on them.

Metal Surcharge Tracker

What the metal surcharge cost against your quotes, what to bill and what you absorbed, for the customer, grade and quote dates you choose.

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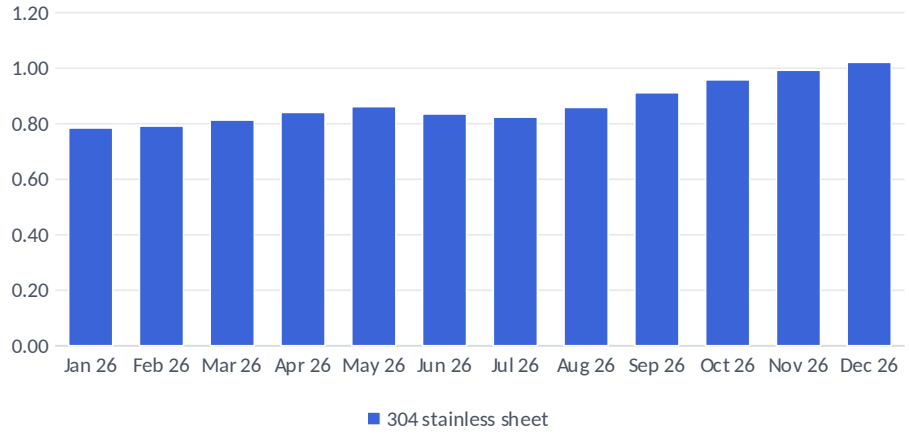
Customer		Quoted from	
Grade		Quoted to	

Showing 60 jobs quoted: 53 bought, 7 not bought yet. Change = weight x (rate used - quoted rate). Rates in USD per lb; the rate chart shows 304 stainless sheet.

SURCHARGE PAID (USD)	CHANGE VS QUOTES (USD)	TO BILL CUSTOMERS (USD)	ABSORBED (USD)
154,324	**+5,556**	**+3,740**	**+1,816**
Jobs bought, at the rate used	Weight x (rate used - quoted rate)	Jobs with a surcharge clause	Jobs without a clause

Published surcharge by month (chart grade)



Surcharge change by month bought

