Finally, a CRM system, made especially for Virtual Assistants.

An excel based solution, which is macro free, so can be viewed on tablets and smartphones. Providing the following advantages for virtual assistants and others who need to keep track of the work which they do for various clients.

Monitor tasks, whether yours or your client's

Log your time spent on each project for each client

Assign time worked, to a project and invoice accordingly

Generate a PDF Invoice

Highlight your process and track the steps

Monitor which documents have been sent

Add your own logo

Customise for the UK or the US

See an overview of the client in one place

Monitor all clients at once on a Master Dashboard

And so much more…

Scroll down to see more about this product

Client Ref. No:		Client Company Name:	Your Client Name *

Invoice & Billing Information

Company Name:	Sumcor Ltd *
Contact Person:	Richard Sumner
VAT Number:	123 456 789

Landline:	0208 123 4567
Alt. Landline:	0208 123 4568
Mobile:	0750 427 0579
Alt. Mobile:	
Email:	richard@spreadsheetsolutions.biz
Fax	

Invoice & Billing Address

Add. Line 1:	1 High Street *
Add. Line 2:	
Add. Line 3:	
Add. Line 4:	
Town / City:	London *
Postcode:	SE1 2AB *

Site or Office Information

Company Name:	
Contact Person:	
Alternative Contact Person:	

Landline:	
Mobile:	
Email:	
Alt. Landline:	
Alt. Mobile:	

Site or Office Address

Add. Line 1:	
Add. Line 2:	
Add. Line 3:	
Add. Line 4:	
Town / City:	
Postcode:	

Use the setup sheet, and the client details sheet, to customise your job card and capture the client details. These details will be used throughout the spreadsheet.

Procedure

Your Company
Your Name

Your Client Name

Status Breakdown

Open:	8
Active:	1
Overdue:	0
Complete:	0
Client Due:	0
Unrequired:	0

Project Start Date:	16/01/2017
Number of Days as Active Days:	3

Complete the red as required. Date override if you wish to override a due date, (and delay all subsequent dates in the first section). Exclude if a task is not required, and completed date when completed. The first section is 'related tasks' and the second, 'unrelated'.

Change on 'Intro & Setup

Exclude	Task Description	Due Date	Date Override	Client To Do	Completed Date	Status
	Meet client and discuss objective	20/01/2017				Active
	Send out quote and t&c	27/01/2017				Open
	Get signed confirmation	03/02/2017		✓		Open
	Confirm receipt					
	Send welcome pack					

Keep track of your usual procedure when dealing with clients. This will help you to keep on top of the sometimes monotonous aspects of your work, which are easily forgettable. There is also a similar list to help you keep on top of your to-do-list, bespoke for each client. All allowing you to determine how long you want each task to be 'active' for, giving you full control.

Time Log

Your Company
Your Name

Enter the date of the work, and how many hours and minutes you worked (only hours if you charge a full hour for part there of). Select the Job Description (based on your list from the 'Jobs to be Invoiced' sheet), or tick the Un-Chargeable column if that entry was for work which you will not charge.

Time per Status Breakdown

Total Time Marked as Invoiced:	0:00
Total Time Marked as Assigned:	22:00
Total Un-Chargeable Time:	0:00
Total Unassigned Time:	0:00

Your Client Name

Date	Time Worked [h]:mm	Job Description	Un-Chargeable	Comments	Status
16/01/2017	6:00	1.Typing of client letters			Assigned
17/01/2017	8:00	2.Monitor of social media accounts			Assigned
18/01/2017	6:00	1.Typing of client letters			Assigned
19/01/2017	2:00	3.Minute taking of meetings			Assigned

As you work, capture the hours worked, and assign them to a project. You also have an expense list, which can be assined to a project. The projects can also be managed, which means that you can marry the time spent, with the projects created. This will enable you to make sure that you invoice for all the time spent, and also that you invoice for all of the projects. The time log, jobs to be invoiced, and invoice list are all balanced against each other, to ensure that you are in control.

Your Company

SPREADSHEET SOLUTIONS

Registered Address: Spreadsheet Solutions, 4 Boxley House, Beckenham, BR3 1PS

Reg. Company No.: 123 654
VAT Number: 123 456

Sumcor Ltd
1 High Street
London
SE1 2AB

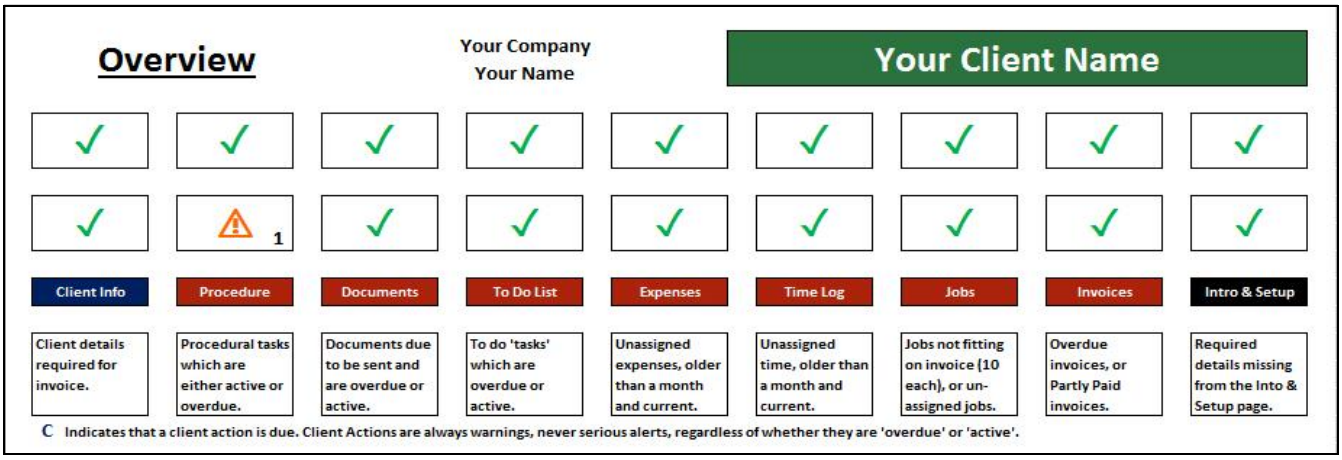
VAT Number: 123 456 789

Invoice Number:	1001
Invoice Date:	19/01/2017

Hours	Hourly Rate (Exc VAT)	Description of Work	Line Price (Exc VAT)
12:00	£15.00	Typing of client letters	£180.00
8:00	£15.00	Monitor of social media accounts	£120.00
2:00	£15.00	Minute taking of meetings	£30.00

Once you close an invoice off, and it is ready to send, and projects assigned to that invoice will show as invoice items. This means that you can track what time has been invoiced for, and what time is still unassigned. Upon selecting the required invoice number from the drop down list, the invoice template is populated and ready to send to the client as a PDF. All that is left to do is to monitor for the client's payment.

Our logo is shown in the picture, but you can add your own logo there.



Overview

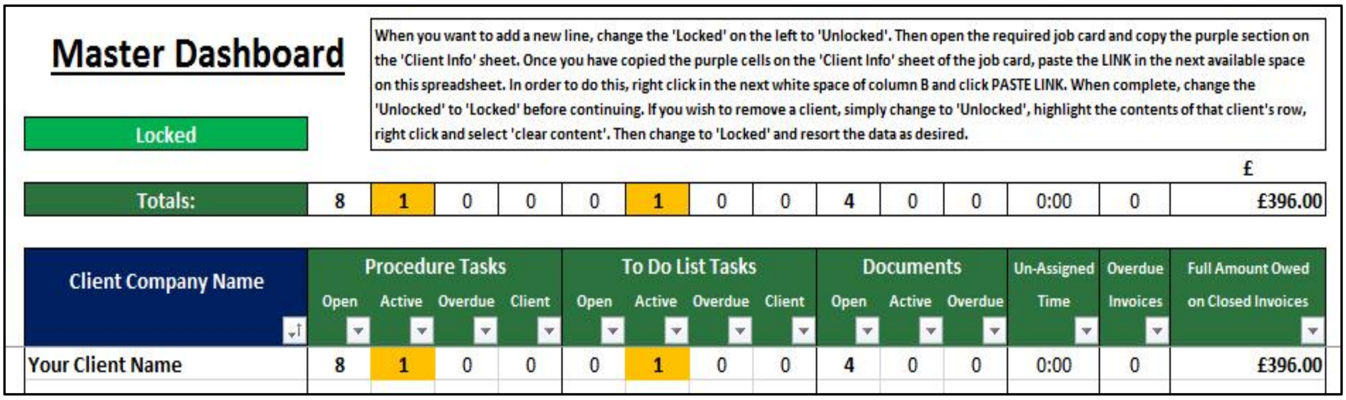
Your Company
Your Name

Your Client Name

Client Info	Procedure	Documents	To Do List	Expenses	Time Log	Jobs	Invoices	Intro & Setup
✓	✓	✓	✓	✓	✓	✓	✓	✓
✓	⚠ 1	✓	✓	✓	✓	✓	✓	✓
Client details required for invoice.	Procedural tasks which are either active or overdue.	Documents due to be sent and are overdue or active.	To do 'tasks' which are overdue or active.	Unassigned expenses, older than a month and current.	Unassigned time, older than a month and current.	Jobs not fitting on invoice (10 each), or un-assigned jobs.	Overdue invoices, or Partly Paid invoices.	Required details missing from the Into & Setup page.

C Indicates that a client action is due. Client Actions are always warnings, never serious alerts, regardless of whether they are 'overdue' or 'active'.

One of the best features of this spreadsheet, an overview of the client in one place. The product has 11 sheets, which is great for allowing you flexibility and excellent to go into detail so that you can monitor your clients efficiently, but not always ideal when you need to see an overview. This overview sheet, shows a 'birds-eye-view' of the client, so that you can see any alarms or warnings at a glance. The sheet also provides time and financial charts, in order for you to track some vital information as you proceed.



Master Dashboard

Locked

When you want to add a new line, change the 'Locked' on the left to 'Unlocked'. Then open the required job card and copy the purple section on the 'Client Info' sheet. Once you have copied the purple cells on the 'Client Info' sheet of the job card, paste the LINK in the next available space on this spreadsheet. In order to do this, right click in the next white space of column B and click PASTE LINK. When complete, change the 'Unlocked' to 'Locked' before continuing. If you wish to remove a client, simply change to 'Unlocked', highlight the contents of that client's row, right click and select 'clear content'. Then change to 'Locked' and resort the data as desired.

Client Company Name	Procedure Tasks				To Do List Tasks				Documents			Un-Assigned	Overdue	Full Amount Owed
	Open	Active	Overdue	Client	Open	Active	Overdue	Client	Open	Active	Overdue	Time	Invoices	on Closed Invoices £
Totals:	8	1	0	0	0	1	0	0	4	0	0	0:00	0	£396.00
Your Client Name	8	1	0	0	0	1	0	0	4	0	0	0:00	0	£396.00

When you purchase this spreadsheet, you get a bonus sheet too (pictured above), where you can paste a link to vital data from each client job card, all onto one list in one place. These links update as you update each job card, giving you an overall view of all of your clients, in one sortable list. The colours change as the details change, so you can easily see which clients need attention.

As these are spreadsheets, and not programmed software, you can decide how you use them. Each spreadsheet can be saved into the file of your choice, and renamed as desired. You can set up your own system, to your own requirements, and then use the spreadsheets within that system. The master dashboard will allow you to add a link once you have set up the other spreadsheet, thus allowing you full control.

So there you have it, an overview of this unique product. We can't show you everything in this brochure, so please use the link below to the demo video, should you wish to see exactly how this product works.
All the other links you may need for more information, or to purchase this product, are below.

In order to purchase this product, download a free trial, or watch the demo video, please click the image to the left.

This product is sold from the UK, and will be invoiced as GBP. The fee is a once off fee, and there is no monthly charge. There will be an entirely optional annual charge, should you want to receive future upgrades.

£380

This product is created by:

SPREADSHEET SOLUTIONS
Creating business solutions through custom spreadsheets
www.spreadsheetsolutions.biz

The use of this spreadsheet acts as acceptance of our terms and conditions.