

SPREADSHEET SOLUTIONS

Creating business solutions through custom spreadsheets

Case Study - Monster Merchandising in Bromley, UK


We were contacted by Monster Merchandising, as they wanted to make their processes more user friendly and productive. They provide an excellent service to their clients, and they wanted a system to manage their quotations, which would keep them on top of what they had quoted.

They already used Excel to keep a list of people that they had quoted, which they needed to follow up on, but they required this list to do more. They entered the information, but the spreadsheet did nothing to help, other than store the data. This is part of their original spreadsheet below.

DATE	CUSTOMER	ITEM	SUPPLIER	EMAIL CONTACT	QTY ORDERED	what I need to do
19/02/2014	David Reed (Barrow)	gullet blocks			10000/2000/2000	average costs 10-15 US
	Wagat					look for receipts
30/05/2014	Spark and Burnie	Semantika	huag-metta ceramic path/promotional ceramic		200	contact/c 27-6 US
31/05/2014	Spark and Burnie	Semantika	020202020/02000/02000/02000/02000			awaiting response to quote
03/06/2014	Blue Rocket	Musad				on hold
	London and	site plan				ring w/c 27-6 US
	MIL OWNERS Club	SUE BLYTH				send call and ring
	Shutech head	ten children/children parks	call			contact description
19/11/2014	Wagat					contact
10/12/2014	Marie Williams	Willow Print Services 01202 05202	order willow print			contact
11/12/2014	Alan Southerton	rotula hulkert box	rod card			contact
11/01/2015	02020 0202 0202		T-020202			contact
20/01/2015	Craig Jones	0207 8227400 www.craigjones.co.uk				awaiting response
06/02/2015	John Hudson School	Jackie New, Sally Oswald 02080011120				sent catalogue
06/02/2015	Wagat	Sarah Latham	huag/pers route			contact April - 7
02/03/2015	First Colours	Tommy	0200 umbrella			sent quote chase 20th
02/03/2015	Loren Wadell	Wadell Marketing	chip school festival			ordered samples
02/03/2015	Demica	Demica	scissors/pen/cufflinks			re do quotes quoted
02/03/2015	John Leach	Director office furniture	Polypipe an document holders			contact
02/03/2015	Warner Brothers					waiting
02/03/2015	WAG					awaiting response
03/03/2005	Westwood	John McQuerry 07752 886708	met at Bar			chase up end April
04/03/2015	John Sawyer		met at London			contact
04/03/2015	McQuerry	Orika	stickie returned/inspect pens			contact
12/03/2015	Cardman Hotels	Jane Bedford Way	loop		120000/20	ordered samples
16/03/2015	Demica	Demica	aprons ref/02020/02020 do not disturb 7020000			await response chase 16-3-15
17/03/2015	Wagat	Wagat	rock 707020			quoted
17/03/2015	Wagat	Wagat	plaid tin			quoted
16/03/2015	Wagat	WAG	self stuff			quoted

This is as far as most people get with Excel, but it can do so much more! We took the project on and created a custom spreadsheet, in order to provide Monster Merchandising with the solution that they require.

We created a new spreadsheet which would capture all of the details as before, but now also allows them to state how long until they need to follow up with each client, as well as to categorise clients as per their choice. The spreadsheet now reminds them when they needed to follow up with each client! The spreadsheet also uses the information to create a unique code for each enquiry.




Client Database

** Do not change* - Please do not alter any information in either of the columns marked with an *, after the initial input. The reason is that this data makes up the Code, which is a unique code used throughout this document. If you have to change any of these details, please make sure that all the relevant codes on the 'Item Database' sheet are changed accordingly.

Code	Qty	Original Date	Client Name	Client Type	Contact	Phone	Email	Days	Latest Follow Up	Status	Quote Value (Exc VAT)
BUS200515-01		20 May 2015	Business Example	VIP	Mark	0208 123 4567	mark@businessexample.co.uk	20		Up to date	£100.00
COM150515-01		15 May 2015	Company Example	Important	Richard	0208 234 5678	richard@companyexample.co.uk	15		Up to date	£25.00
COR100515-01		10 May 2015	Corporate Example	Good	Chris	0208 345 6789	chris@corporateexample.co.uk	15		Due in 4 Days	£25.00
SOL050515-01		05 May 2015	Sole Trader Example	Possible	Colin	0208 456 7890	colin@soletraderexample.co.uk	20		Up to date	£25.00
BUS010515-02	02	01 May 2015	Business Example	VIP	Mark	0208 123 4567	mark@businessexample.co.uk	20		Due in 4 Days	£25.00

Once the enquiry has been generated, they are then able to select that unique enquiry code, and then assign products, suppliers and prices (cost and selling) to the entry. This was lacking before from their original spreadsheet, and will provide a wealth of information. The spreadsheets calculates how many lines you have for each quote, as well as showing some details of the quote selected.



Item Database

Code	Supplier	Item Description	Qty	Exc VAT		Item	Expired	Original Date	Client Name
				Unit Cost Price	Unit Quoted Price				
BUS200515-01	Supplier 1	Pens	100.00	£25.00	£25.00	1		20 May 2015	Business Example
BUS200515-01	Supplier 2	Mugs	20.00	£25.00	£27.50	2		20 May 2015	Business Example
BUS200515-01	Supplier 3	Stress Balls	30.00	£25.00	£25.00	3		20 May 2015	Business Example
BUS200515-01	Supplier 4	Note Pads	30.00	£25.00	£25.00	4		20 May 2015	Business Example

Monster Merchandising were even able to capture a supplier list, which would then make their suppliers available from a drop down list. This would then show the suppliers details on the **Quotation Report**. To populate this report, all they need to do is select the respective code (from the drop down list) of the quote which they wish to view. Take a look on the next page at an image of the Quotation Report, this is the top half of their report, showing the quote details, and various useful pieces of information, which they would not have had before.

Quotation Report**Job Type:****VIP**

Quotation Number

BUS200515-01

Client Name:

Business Example

Original Quote Date

20 May 2015

Contact Name:

Mark

Phone Number:

0208 123 4567

Email Address:

mark@businessexample.co.uk

No.	Items	Quantity	Unit Cost Price	Unit Selling Price	Line Selling Price	Supplier	Phone
1	Pens	100.00	£1.00	£1.50	£150.00	Supplier 1	0208 098 7654
2	Mugs	20.00	£2.50	£3.50	£70.00	Supplier 2	0208 987 6543
3	Stress Balls	30.00	£2.00	£3.00	£90.00	Supplier 3	0208 876 5432
4	Note Pads	30.00	£1.50	£2.50	£75.00	Supplier 4	0208 765 4321
5							

This is the bottom of the Quotation Report, which shows how much the materials cost them, how much they are selling them for, and how much gross profit they stand to make. Who would say no to this information!

Current VAT Rate	Gross Profit as a Percentage	Cost Price:	£150.00	Sub Total:	£225.00
20.00%	40%	Selling Price:	£270.00	VAT:	£54.00
		Gross Profit:	£120.00	Sub Total:	£225.00

We're sure that you can see how much Monster Merchandising would have benefitted from this new spreadsheet, and we know that you're already thinking of ways that a custom spreadsheet could make your administration process easier and more productive. Take a look at what Monster Merchandising have to say.

Monster Merchandising had this to say:

"Thanks Spreadsheet Solutions. The spreadsheet you designed for our business has helped a lot. Before we had your improved version, we were quite disorganised. It has saved us a lot of time, and we know exactly where we are with all our enquiries and prospective clients. We will also be able to adapt it as needed when we get busier. Thank you very much, we have recommended your services to several people and will continue to do so"

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The other strength of our spreadsheets, is that they are easily upgradeable. There are a few potential upgrade options for this spreadsheet, once the data has been captured, we like to use the information in as many applications as we can in order to get the most out of it. Here are some upgrade ideas using the captured data in this case study spreadsheet.

QUOTATION - which can be saved as a PDF and sent to the client

INVOICE - which can be saved as a PDF and sent to the client

INVOICE TRACKER - to track which invoices have been paid

QUOTATION STATISTIC - which will highlight the quotation success rate

SALES STATISTICS - which could show all aspects of the sales

GRAPHS & CHARTS - showcase the above data in an easy to understand format

CUSTOM - the sky is the limit, let your imagination lead you...

Thanks for taking a look at this case study, we hope that it has inspired you to commission us to create you your very own custom spreadsheet. This is merely an example of what we can do, we create each spreadsheet specifically for our unique clients. We do have standard products in our store if you would prefer to 'try before you buy'. Please click the logo to visit our website.

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