

# 10 Business Problems Solved by Excel and



Over the last two years, we have solved many problems that businesses have experienced. We have a unique way of dealing with problems, seeing them not as a hindrance, but rather as a potential success. We have selected 10 of our favourites which we have showcased here. We use our advanced experience in Excel to create a tailor-made solution for our clients.

Problem 1. "I don't know how much time I have spent on each client, I spend ages trying to work out the time spent so I can charge them accordingly."

**Solution:** We created a simple to use spreadsheet where you were able to capture the time which you spent on projects, as you spent it. This was merely one of the many reports calculated as a result of the data entered. Month by month, time spent per particular project and the amounts to bill the clients. (these were the statistics for one client as selected).

Month	Hours	Amount
April 2014	0:00	£0.00
May 2014	0:00	£0.00
June 2014	3:00	£60.00
July 2014	10:00	£165.00
August 2014	5:00	£50.00
September 2014	4:00	£40.00
October 2014	2:00	£20.00
November 2014	9:00	£135.00
December 2014	6:00	£120.00
January 2015	3:00	£60.00
February 2015	4:00	£40.00
March 2015	0:00	£0.00

Problem 2. "I'm a London based sales rep, and I need to have an easy to understand visitation sheet which I can print out and take with me on the road."

**Solution:** We used a combination of Excels graphs and a picture of a map to create a map of the client's graphical jurisdiction. Once we had downloaded all of the longitudes and latitudes of the post codes of the area, we could create this automated map. You select the clients that you wish to visit and it accesses all of their information from their job card, and displays the relevant details and location. Simple, precise and organised!

Company Name	Postcode	Address	Hand written notes only
Sample 1	NW2 7JL	Made Up Street, London	
Sample 2	SW18 5JL	Created Road, London	
Sample 3	BR3 3PS	Make-Believe Avenue, London	
Sample 4	BR1 2BZ	Another Place, London	

Problem 3. "I create hampers for people, and I need to be able to change the price of a specific item and have all of the hampers that contain that item adjust accordingly. I also need to get prices for the hampers (including labour) and I need to have a material breakdown for all orders."

**Solution:** This one was an exciting challenge, we love to tackle practical problems like this one, and project management is right up our alley. Firstly we created a database for all of the materials, and assigned prices for each. We then created a section where you could allocate specific materials to each hamper. All that was left to do was to allow the opportunity to add a price for labour for each hamper (some required more time than others). This was the final result, the top right picture shows the quote that you could generate for your client. Select the product, and how many they require and it calculated the rest. It even calculated a complete list of materials required for all of the hampers! (See the picture labelled 'Materials List'). This also allowed the client to change a price on the materials price list, and all the hampers that contain that material will adjust automatically. Imagine the time savings here!

COSTING AND MATERIAL LIST				Job:	Client
				Date:	10 Apr 14
Product Code	Product Name	Recommended Selling Price Exc VAT	Quantity Required	Total Recommended Selling Price Exc VAT	Error
Product 3	Product 3 Name	£1,596.00	2	£3,192.00	
Product 2	Product 2 Name	£858.00	3	£2,574.00	
Product 1	Product 1 Name	£1,812.00	4	£7,248.00	
				Total Excluding VAT	£13,014.00
				VAT @ 20%	£2,602.80
				Total Including VAT	£15,616.80

MATERIAL LIST					
Material Code	Material Name	Units	Qty	Supplier	Supplier Code
Material 8	Material 8 Description	Units	14 Stock		None
Material 7	Material 7 Description	Units	3 Stock		None
Material 6	Material 6 Description	Units	12 Stock		None
Material 5	Material 5 Description	Units	3 Stock		None
Material 4	Material 4 Description	Units	16 Stock		None
Material 3	Material 3 Description	Units	8 Stock		None
Material 2	Material 2 Description	Units	22 Stock		None
Material 1	Material 1 Description	Units	8 Stock		None


Problem 4. "I need to know which branch is performing the best, and I would also like to know which of our advertising ventures are the most successful"

**Solution:** This one was easy, the client wanted to keep specific record of each transaction. They already had a spreadsheet where they captured each transaction with the necessary data. We took the idea of their spreadsheet and expanded on it. Without requiring any extra data we managed to get these automated reports (as well as others). Here you can see the report for each branch as well as a breakdown of the success of each advertising method. We also managed to have a report showing each salesperson's income and earnings at a specified percentage. This was all work that the owner would sit and do manually. It is now automated. Simple, precise and organised! If you have spreadsheets that you use, why not see if we can offer you any upgrades to achieve more from what you already have?

### BRANCH REPORT January 2013

Ace Estate Agents

BRANCH		Total Lettings	Total Property	Total Sales	TOTALS
		Income Less Man. Fees	Management Income	Income	
Bromley	BR2	£3,078.00	£186.00	£55,600.00	£58,864.00
Beckenham	BR3	£2,700.00	£165.00	£43,500.00	£46,365.00
Bickley	BR1	£2,376.00	£147.00	£44,700.00	£47,223.00
West Wickham	BR4	£3,420.00	£205.00	£105,000.00	£108,625.00
Oprington	BR6	£2,142.00	£134.00	£61,800.00	£64,076.00
St Mary Cray	BR5	£2,880.00	£175.00	£30,000.00	£33,055.00
		<b>£16,596.00</b>	<b>£1,012.00</b>	<b>£340,600.00</b>	

Zoopla	£19,590.00
Local Paper	£38,826.00
Flyer	£26,690.00
Email	£31,950.00
Friend	£71,050.00
Rightmove	£20,770.00
Shop	£20,742.00
Used Before	£12,140.00
Other	£39,118.00

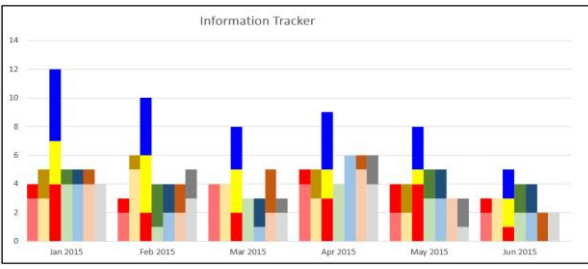
Problem 5. "I need a project management system which keeps track of my jobs. I would also like the documents that I send to clients to be automatically generated and up to date."

**Solution:** We created just that! This was one of our largest projects to date. It kept track of each project, purchases, invoices, labour and many other criteria. The image to the right shows part of a report that was automatically generated based on the job card. There was no need to update this, as the invoices were paid and you captured it, this document would show it off automatically. The dates would all update as you went along. So many companies spend ages filling in the same information in various locations, in general you only need to fill some data in once and it should be able to filter through to all relevant areas. This eliminates errors and saves time. We have also managed to automate invoices, quotes, reports and even confirmation letters to clients. We can't show you all of those pictures as they contain sensitive client data.

Date	Project Events	
30/04/13	Order issued by Andrew Smith.	Complete
30/04/13	60 % Deposit, by return prior to manufacturing. Now due. Paid in Full!	Complete
01/05/13	Deposit to be paid by this date	Complete
02/05/13 (Week Of)	Commencement of manufacturing (please note manufacturing time can vary)	Complete
10/05/13 (Week Of)	30 % On completion of manufacturing, prior to fixing on site. Now due.	
13/05/13	3rd interim due no later than this date	
13/05/13 (Week Of)	Installation on site	
13/05/13 (Week Of)	Inspection & handover certificate completed by client's representative prior to LGC leaving site	
13/05/13 (Week Of)	Completion of project	
14/05/13 On Completion	10 % On completion, payment due on invoice.	

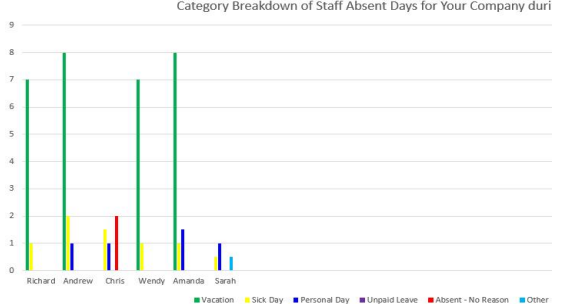
Problem 6. "I have the raw data, but it makes no sense to me, I need something that will analyse the data and give me a report."

**Solution:** This is money for jam with Excel! We had had a few companies coming with this issue, and we love to create project management dashboards like the one illustrated here. We create sheets where you are able to capture the relevant data, and then use formulas and charts to display the relevant 'bottom-line' statistics in such a way that it is easy to read. Most companies have tons of data, but they don't actually have the information that will help them to make the right business decisions. A dashboard spreadsheet will take your raw data and transform it into very useful information. The chart on the right is part of a project management dashboard, which was custom made. The chart itself was also custom made as Excel 2013 is not set up for stacked, clustered column charts. We custom made this one.



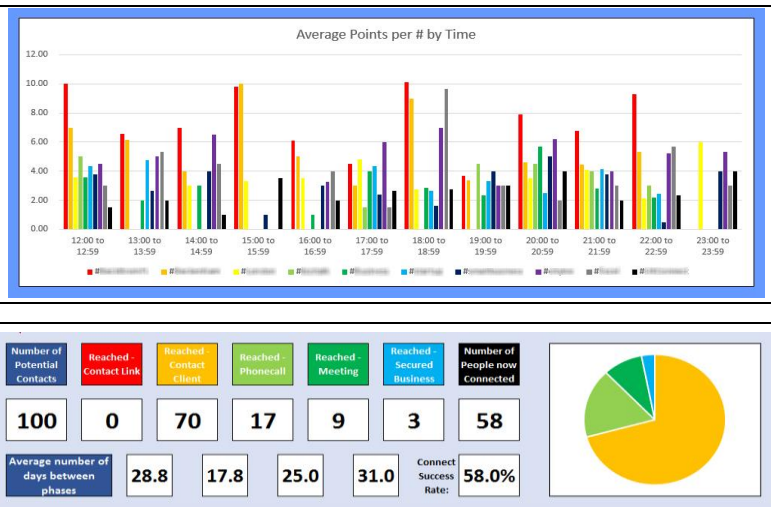
Problem 7. "We don't have an official HR department, so we need to keep track of what is going on with our staff. Can you help us to keep on top of our staff situation?"

**Solution:** We have realised just how big an issue managing staff can be, that we have created 5 staff management related spreadsheets to date (3 of which are available to purchase in our store, and 1 can be downloaded for free). We have created a spreadsheet to track absentee days and vacation time, as well as closure dates for the business. We have also created various staff appraisal spreadsheets, and even one to succession plan for all of your companies important positions. At the time of the creation of this document, our staff related spreadsheets were the most purchased (and the brochures the most downloaded) of all of our products. It appears that this is a real issue for businesses, so I doubt that we have even scratched the surface in this industry.



Problem 8. "We have some social media accounts, but we don't really know how productive they are. Can you help us to properly analyse how our social media accounts are performing?"

**Solution:** We hear you, we have the same issue. We have already created a spreadsheet to give you more information about your twitter presence, which you can purchase in our store. Most social media platforms have certain statistics and data analysis, but it never seems to be quite what we are looking for. That is what lead us to create the 'Tweet Manager' spreadsheet. We have also created a useful LinkedIn tool, that helps individuals to make the most of LinkedIn, which you can download for free on the free downloads page on our website. As social media becomes more and more vital to companies, I can see that we will be doing more such spreadsheets in the future. We also realise that different people will require different solutions, another benefit of using Excel.



Problem 9. "We need a simple system, to create and monitor invoices. We would like to be able to create invoices based on our price list, and then track which of our clients have paid and which haven't."

**Solution:** There are many invoicing systems out there, many of which are cheap to purchase or even free. This made us hesitant to create such a system, although since we have, it has proved quite popular. There are so many businesses out there who use word document template to create invoices, and then monitor who has paid by keeping the paper printouts in the respective tray! We have created one product in particular, which is available in our store, that will make this process much easier. Create invoices (based on your price list), select the client from your client list, and then monitor who has paid and who hasn't. All in an Excel spreadsheet. This is also an area where one size doesn't necessarily fit all, so I'm sure we'll be doing more of these in the future. To the right, is a picture of an invoice generated by this spreadsheet. It was created as a 'standard' product, so it is fairly customisable. If we were to custom make something like this, we could potentially go into much more detail, and add more features. The example used here was based on a company that made and sold sandwiches.

Problem 10. "We would like a system to track our sales, and see if we are reaching our targets. We would also like to see our predicted income based on previous years."

**Solution:** This is a common issue for all business, at the end of the day, we do what we do to make money. We all have targets and we all try to reach those targets. If we can see where we are at any given stage, this could be invaluable to us. Now we could go into much more detail with a spreadsheet like this, depending on the specific company and their requirements, but we have made a simple one-size-fits-all spreadsheet, which we are giving away. If you have other spreadsheets (for example one where you create and track your invoices) it could actually be linked with this one, which means you don't even have to capture the data for this spreadsheet, it could be fed by the other! This is one more benefit of using Excel. Take a look at the examples of sales tracking (figures are fictitious).



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