SPREADSHEET SOLUTIONS

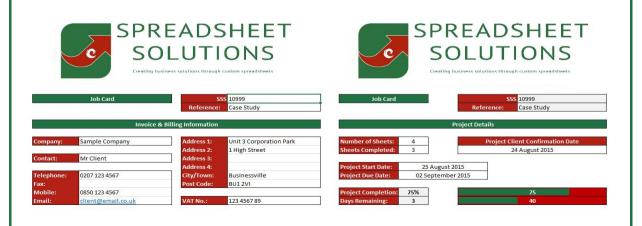Creating business solutions through custom spreadsheets

CASE STUDY - OUR OWN INTERNAL PROJECT MANAGEMENT SYSTEM

Yes, you read correctly. We have decided to use our very own internal management system as a case study. People often contact us and ask what project management system we can create for them, however they usually underestimate what we can do. We hope that this case study shows you what we are capable of, but please don't let this limit your imagination, we created this system for our requirements. Take a look at what we have done, and think about what we could do to help you manage your projects more effectively. Just to let you know, the spreadsheet involved in this case study is macro-free and consists of 4 sheets. Take a look.

Firstly, we have the contact sheet. This is where we enter in most of the information. Job number, client details, project confirmation date, number of sheets and the start and completion date. The spreadsheet then shows us how many days we have left, which then shows how far we are into the project, both in time and number of pages completed. This enables us to make sure that we stay ahead of schedule. All of the information in the white cells below are manually entered, but it all gets fed to other parts of the spreadsheet. The grey cells are automated.

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Job Card		SSS	10999
		Reference:	Case Study

Invoice & Billing Information

Company:	Sample Company	Address 1:	Unit 3 Corporation Park
		Address 2:	1 High Street
Contact:	Mr Client	Address 3:	
		Address 4:	
Telephone:	0207 123 4567	City/Town:	Businessville
Fax:		Post Code:	BU1 2VI
Mobile:	0850 123 4567		
Email:	client@email.co.uk	VAT No.:	123 4567 89

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Job Card		SSS	10999
		Reference:	Case Study

Project Details

Number of Sheets:	4	Project Client Confirmation Date	
Sheets Completed:	3	24 August 2015	
Project Start Date:	25 August 2015		
Project Due Date:	02 September 2015		
Project Completion:	75%	75	
Days Remaining:	3	40	

We then complete the rest of the information sheet, which is the job heading and job description. We just enter a description of the job, however you could have this more advanced. You could have some selection options which could add in certain chapters. For example, if you have personal and business clients, you could have a different paragraph to be included for the various types. Just select the job type, and the respective paragraph would appear, with the relevant information! What we have here is a very simple version, don't limit your options to what you see here.

Site Details (Location of Programme)		
Company: Sample Company	**Address 1:**	Unit 3 Corporation Park
	Address 2:	1 High Street
Contact: Mr Client	**Address 3:**	
	Address 4:	
Telephone: 0207 123 4567	**City/Town:**	Businessville
Fax:	**Post Code:**	BU1 2VI
Mobile: 0850 123 4567		
Email: client@email.co.uk		

Project Information
Starting Date for Monthly Payments (if Required):
Day of Month for Monthly Invoices to be Issued (if Required):

Job Description Heading and Details
Job Description: Case Study Job Description
This would be a description of the job, including the number of sheets, sheet titles and what imformation will appear on each sheet. This is just a slightly more detailed description of the job, but you could actually have paragraphs appearing based on a selection. For example, if you had personal clients, or business clients, you could select one and have a relevant paragraph based on the data on the contact page. The sky is the limit with these descriptions.

Job Notes for SSS10999 - Sample Company - Case Study

The next sheet is the quote. Do you find that you spend ages typing up a quote, or using old ones and then changing details as per the new job? This can be done in a fraction of the time. The quote template is already laid out and populated by the information already entered, this means that all I need to enter is the date, and the price breakdown. The rest is already populated. Most of the quote is standard terms and conditions, and the client's details already entered. You could even have certain terms and conditions showing, depending on selections already made, if you wish.

Our Ref: SSS 10999

24 August 2015
DELIVERY ADDRESS (If required):
Sample Company
Unit 3 Corporation Park
1 High Street
Businessville
BU1 2VI

Sample Company
Unit 3 Corporation Park
1 High Street
Businessville
BU1 2VI

Dear Mr Client

Re: Case Study Job Description

We acknowledge with thanks your recent enquiry for the development and supply of an Excel spreadsheet as stated below, This quotation is valid for a period of 30 days from the date of this quote.

This would be a description of the job, including the number of sheets, sheet titles and what imformation will appear on each sheet. This is just a slightly more detailed description of the job, but you could actually have paragraphs appearing based on a selection. For example, if you had personal clients, or business clients, you could select one and have a relevant paragraph based on the data on the contact page. The sky is the limit with these descriptions.

PAYMENT PLAN

Deposit	50	%	Deposit invoice, due before work begins	£400.00	Once off, Exc VAT
Completion	50	%	Completion invoice, due on handover	£400.00	Once off, Exc VAT

We select the type of entry (deposit), and input the percentage and the amount, the rest is automatically generated. The beauty is that the information entered here is not only for the quotes, but goes to create the invoices and payment schedule too.

We hope the above is to your satisfaction and look forward to your valued instructions. In the meantime, should you require any additional information, please contact the undersigned.

Kind regards,

Richard Sumner
Managing Director

Email Address: richard@spreadsheetsolutions.pw
Phone Number: 0750 427 0579

Terms & Conditions

We even have a staff list hidden away, so that selecting your name, will bring up all of your contact details. At this point we 'save as' a PDF which we then send to the client.

The next sheet is our time schedule and report. We need to know how much time we are spending on each job, and we also need to track our progress. We need to know how far along we are with allocated time, project progress and money earned. On this sheet, we allocate the number of hours we expect the job to take, and then as we go along we capture the time that we spend. The spreadsheet shows us how much we have earned (based on the invoices paid which we will get to next), it shows us how much time we have spent (based on the time inputted) and it shows us how far the project is (based on the number of pages done). This is data gathered from all of the pages of the spreadsheet, not just what is entered here. This is one of the major advantages of having you entire job card on one spreadsheet, and not on various document types, you can enter data once and use it for various calculations.

Time Card & Report	
Total Quoted Price	£800.00
Price Paid to Date	£400.00
Total Predicted Time:	40:00
Total Hours Worked:	28:00
Predicted Time Left:	12:00

Pounds per Hour Rates	
Total Quoted / Predicted	£20.00
Total Quoted / Worked	£28.57
Paid to Date / Predicted	£10.00
Paid to Date / Worked	£14.29

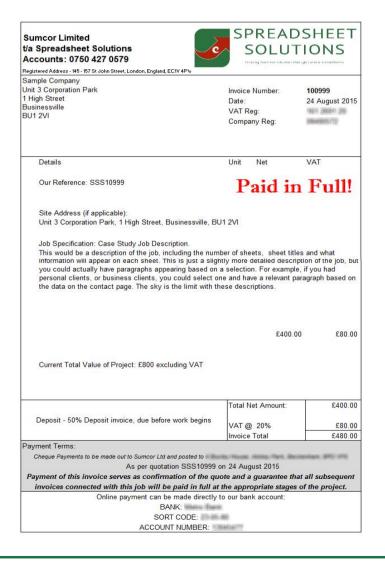| Date	Month	Start Time	End Time	Less Breaks	Time Spent	Notes
25 August 2015	August 2015	08:00	17:00	1:00	08:00	
26 August 2015	August 2015	08:00	17:00	1:00	08:00	
27 August 2015	August 2015	08:00	17:00	1:00	08:00	
28 August 2015	August 2015	08:00	12:00		04:00	

Progress Report Chart

The next sheet is possibly one of the most useful and important, it is where we track the payments on the job. Now we have another spreadsheet where we capture each invoice number and the respective details, so all we need to do here is enter the invoice date and number. The spreadsheet calls up the information entered on the quote, and then uses the invoice number entered to check the invoice master list, in order to establish the status of the payment. This will check that we have invoiced the correct amount, and that it has been paid, and will alert me if there are any mistakes. The information gathered here will also populate other sheets, so that we can tell the progress of the project based on payments.

	Invoice List & Financial		Total Quoted:	£800.00		Total Paid:	£400.00
	Total Amount Quoted but Still to Invoice:		£400.00		Total Invoiced:	£400.00		Total Owing:	£0.00

Complete Invoice List for SSS10999 - Sample Company - Case Study - as per quote

100 %

Code	% of Total	Description	Quoted	Occurrence	Invoice Date	Invoice No.	Amount (Ex VAT)	VAT	Amount (Inc VAT)	Paid	Paid Date	Me
Deposit	50 %	Deposit invoice, due before work begins	£400.00	Once off, Exc VAT	24 Aug 15	100999	£400.00	£80.00	£480.00	Yes	24 Aug 15	Transfe
Completion	50 %	Completion invoice, due on handover	£400.00	Once off, Exc VAT								

The last sheet is the invoice itself. The same problem often arises with invoices as with the quotes, people tend to use old documents and 'update' them as per the current job, often resulting in mistakes. We have the invoice template already, so all we need to do is select the invoice number from a drop down list. The list contains all of the invoice numbers relating to that particular job. Select the number that you wish to display, and there is the invoice. Populated as required. It even shows 'Paid in Full' if the invoice has been paid.

This way, you don't have to have an invoice template for each invoice, just one, which populates according to the selected number. Once the number has been selected, we then 'save as' a PDF, which we can keep as our records and send to the client. As you can see, the invoice states which invoice it is in relation to the job, and what the total value of the job is. You could have the invoice laid out how you wish. As per all of the documents, the layout and company logos are as per your design, we don't have any 'standard' templates.

Sumcor Limited
t/a Spreadsheet Solutions
Accounts: 0750 427 0579
Registered Address - 145 - 157 St John Street, London, England, EC1V 4PW

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Sample Company
Unit 3 Corporation Park
1 High Street
Businessville
BU1 2VI

Invoice Number:	**100999**
Date:	24 August 2015
VAT Reg:	
Company Reg:	

Details	Unit	Net	VAT
Our Reference: SSS10999			

Paid in Full!

Site Address (if applicable):
Unit 3 Corporation Park, 1 High Street, Businessville, BU1 2VI

Job Specification: Case Study Job Description.
This would be a description of the job, including the number of sheets, sheet titles and what information will appear on each sheet. This is just a slightly more detailed description of the job, but you could actually have paragraphs appearing based on a selection. For example, if you had personal clients, or business clients, you could select one and have a relevant paragraph based on the data on the contact page. The sky is the limit with these descriptions.

	£400.00	£80.00

Current Total Value of Project: £800 excluding VAT

	Total Net Amount:	£400.00
Deposit - 50% Deposit invoice, due before work begins	VAT @ 20%	£80.00
	Invoice Total	£480.00

Payment Terms:
Cheque Payments to be made out to Sumcor Ltd and posted to
As per quotation SSS10999 on 24 August 2015
Payment of this invoice serves as confirmation of the quote and a guarantee that all subsequent invoices connected with this job will be paid in full at the appropriate stages of the project.
Online payment can be made directly to our bank account:
BANK:
SORT CODE:
ACCOUNT NUMBER:

So there you have it. We also have certain information linked from this spreadsheet, to a management spreadsheet, where we can see a review of all of the jobs at once. That list shows us vital data from each project, on one sheet, all colour coded. That means that we can open it up and see any 'problem areas' at a glance. I'm sure that you will admit that knowing where you are on all of your projects is useful to know at the very least.

We hope that this case study has inspired you to get us to create your project management software. This was all created using Excel, and is a macro-free spreadsheet, imagine what we can do for you. Please use the links below to visit our website and contact us. We have videos, free downloads, brochures, and a wealth of information about what we do on our website. You can also sign up to receive our monthly newsletter. **If you think that your business would benefit from a spreadsheet like the one shown here, please contact us using the links below.**

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