



# 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 (Europe)	golfet blocks			10000/2000/10000	average costs 10-15 US look for receipts
	regard					
30/05/2014	Spartak and Runble	Samartha	Huge media campaign path/promotional campaign		200	contact/c: 27-6 US
31/05/2014	Spartak and Runble	Samartha	30000/10000/10000/10000/10000/10000			awaiting response to quote
03/06/2014	Blue Rocket	Miguel	scratch cards			on hold
	condemni vinyl	site gifts				req w/c 27-6 US
	MC OWNERS Club	SLC 8, 17th				send cat and req
	golfet head	ten children/children parties	call			contact word/10M
19/11/2014	Houston					contact
10/12/2014	Walter Willoughby	Willow Print Services 01202 202000	under willow print			contact
11/12/2014	Clare Southstone	variable bullet/10000	find card			contact
11/01/2015	CHRON 21100 AMER		T-SHIRTS			contact
20/01/2015	Craig Lester	0207 8227400 money consultation Govt				awaiting response
06/02/2015	John Rudden School	Jacky New, Sally Oberhall 02088333333				sent catalogue
06/02/2015	Renald	Sarah Callinick	Musicians route			contact April - 7
02/03/2015	First Colour	Ernie	10000 umbrellas			send quote chase 10000
02/03/2015	Janet Warden	Western Marketing	cheap school T-shirts			ordered samples
02/03/2015	Dorothea	Ernie	scraper/tee/suffles			re do scraper quoted
02/03/2015	Adrian Leach	Director office furniture	Philips an document holders			contact
02/03/2015	Warner Brothers					ongoing
02/03/2015	WIS					awaiting response
03/03/2005	Westwood	John McQuerty 07713 488700	met at show			chase up end April
04/03/2015	John Sawyer		iron on badges			contact
04/03/2015	Westwood	Gilia	stickie ref/046121/14000			contact
12/03/2015	Cardinal Hotels	Jane Rufford May	logo			ordered samples
16/03/2015	Dorothea	Ernie	approx ref/046121/14000 do not delete- 75000000			await response-chase 10-3-15
17/03/2015	Liffers	Robert	rock 7578228			quoted
17/03/2015	Liffers	Robert	shirt-10			quoted
16/03/2015	Liffers	AB	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	£200.00
COM150515-01		15 May 2015	Company Example	Important	Richard	0208 234 5678	richard@companyexample.co.uk	15		Up to date	£100.00
COR100515-01		10 May 2015	Corporate Example	Good	Chris	0208 345 6789	chris@corporateexample.co.uk	15		Due in 4 Days	£150.00
SOL050515-01		05 May 2015	Sole Trader Example	Possible	Colin	0208 456 7890	colin@soletraderexample.co.uk	20		Up to date	£100.00
BUS010515-02	02	01 May 2015	Business Example	VIP	Mark	0208 123 4567	mark@businessexample.co.uk	20		Due in 4 Days	£100.00

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	Unit Cost Price	Unit Quoted Price	Item	Expired	Original Date	Client Name
BUS200515-01	Supplier 1	Pens	100.00	£1.00	£1.00	1		20 May 2015	Business Example
BUS200515-01	Supplier 2	Mugs	20.00	£2.50	£7.50	2		20 May 2015	Business Example
BUS200515-01	Supplier 3	Stress Balls	30.00	£2.00	£3.00	3		20 May 2015	Business Example
BUS200515-01	Supplier 4	Note Pads	30.00	£1.50	£4.50	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	£2.00	£200.00	Supplier 1	0208 098 7654
2	Mugs	20.00	£2.00	£3.00	£60.00	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	£2.00	£3.00	£90.00	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:		Sub Total:	
<b>20.00%</b>	<b>40%</b>	Selling Price:		VAT:	
		Gross Profit:		Sub Total:	

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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