

Re-occurring Service Reminder

An excel based solution, which is macro free, to enable you to monitor the re-occurring services that you offer your client. If this sounds like what you need, take a look at the details below.

Ideal for accountants

Do you offer re-occurring services?

Track the last of each service to each client

Track up to 20 services and 250 clients

See success rate of finishing services on time

See upcoming services in order of urgency

Easily list clients and starting date for each service

Assign services to weekly, fortnightly, 4 weekly, monthly, quarterly, 6 monthly, or annually

Assign your own yellow and orange alerts

And so much more...

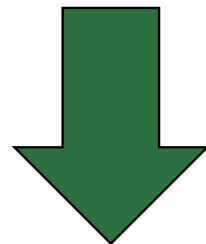
Need to track re-occurring service? No problem.

Task List				Page Details		Filters		
In order of importance				On this page only		Leave blank to include all entries		
<small>The tasks required will appear on this sheet, in order of urgency, based on the details on the other tabs. You can use the filters to the right to filter per client or service (or both). Please note that only 25 tasks will appear here. Change the page number to see the desired page, but remember to go back to page 1 so that you don't miss anything.</small>				2 x Overdue	Black 0	Service		
			Overdue	Red 0	Client			
			Orange Alert	Orange 0	Page Number	1	of 1	
			Yellow Alert	Yellow 2				
Status	Date Due	Client	Full Service Name	Short Name	Frequency	Time	Price	
Yellow	Fri, 10 May 2019	Client 4	Full Service Name 1	Service 1	Weekly	1:00	£10.00	
Yellow	Mon, 13 May 2019	Client 2	Full Service Name 2	Service 2	Fortnightly	2:00	£20.00	
Green	Tue, 14 May 2019	Client 1	Full Service Name 1	Service 1	Weekly	1:00	£10.00	
Green	Sat, 18 May 2019	Client 5	Full Service Name 2	Service 2	Fortnightly	2:00	£20.00	
Green	Mon, 27 May 2019	Client 3	Full Service Name 3	Service 3	4 Weekly	3:00	£25.00	
Green	Sat, 01 Jun 2019	Client 5	Full Service Name 3	Service 3	4 Weekly	3:00	£25.00	
Green	Mon, 03 Jun 2019	Client 1	Full Service Name 4	Service 4	Monthly	6:00	£60.00	
Green	Tue, 04 Jun 2019	Client 3	Full Service Name 5	Service 5	Quarterly	12:00	£80.00	
Green	Fri, 07 Jun 2019	Client 4	Full Service Name 4	Service 4	Monthly	6:00	£60.00	
Green	Mon, 05 Aug 2019	Client 2	Full Service Name 6	Service 6	6 Monthly	10:00	£100.00	
Green	Mon, 04 Nov 2019	Client 5	Full Service Name 6	Service 6	6 Monthly	10:00	£100.00	
Green	Thu, 02 Jan 2020	Client 1	Full Service Name 7	Service 7	Annually	20:00	£200.00	
Green	Mon, 06 Apr 2020	Client 4	Full Service Name 7	Service 7	Annually	20:00	£200.00	

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 SPREADSHEET SOLUTIONS

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Services List

List your services here, both the full name, and a shortened name for the headers on other pages (as there is a limited column width). Also select the frequency of the required service. The time to do each service and the price charged can also be added, but these are not vital, as it is just to give you an idea of income and time required. As soon as you enter any information, the required cells will turn yellow. Please complete all yellow cells, and if any turn red, correct them.

Calculated Rate / Hour £8.62

Grand Totals

13 £4,810.00 558:00

Full Service Name	Short Name	Frequency	Time Taken	Price
Full Service Name 1	Service 1	Weekly	1:00	£10.00
Full Service Name 2	Service 2	Fortnightly	2:00	£20.00
Full Service Name 3	Service 3	4 Weekly	3:00	£25.00
Full Service Name 4	Service 4	Monthly	6:00	£40.00
Full Service Name 5	Service 5	Quarterly	12:00	£80.00
Full Service Name 6	Service 6	6 Monthly	10:00	£100.00
Full Service Name 7	Service 7	Annually	20:00	£200.00

Count	Annual Value	Annual Time	Hourly Rate
2	£1,040.00	104:00	£10.00
2	£1,040.00	104:00	£10.00
2	£650.00	78:00	£8.33
2	£960.00	144:00	£6.67
1	£320.00	48:00	£6.67
2	£400.00	40:00	£10.00
2	£400.00	40:00	£10.00

Firstly, you can list up to 30 services, and state how often they are required. You have the option to select weekly, fortnightly, 4 weekly, monthly, quarterly, 6 monthly, or annually. Simply add each service name, a short name (for the header), the frequency, and then the time it takes to do the job and the price (the last two are optional). The other data (in green) will update as you assign services to clients.

Once you have a list of services, you can then progress to the rest of the spreadsheet.

Client List & Start Date

Enter the starting date for each service/client. For example, if the first client needs the first listed service, then add the starting date in cell C11. The start date should be the first date that you start a service, which will then determine all future dates for that service and that client. As soon as you enter a date here, it will activate that service for that client on an ongoing basis. If you leave a cell blank, it means that the particular client does not require the relevant service.

Client Name	Service 1	Service 2	Service 3	Service 4	Service 5	Service 6	Service 7
Client 1	01 Jan 2019			01 Jan 2019			01 Jan 2019
Client 2		03 Feb 2019				03 Feb 2019	
Client 3			04 Mar 2019		04 Mar 2019		
Client 4	05 Apr 2019			05 Apr 2019			05 Apr 2019
Client 5		04 May 2019	04 May 2019			04 May 2019	

You can then go on to add up to 250 clients, and add a start date for each service that they require, simple as that. The services are taken straight from your list, so all you need to do is add a start date for each service for each client. If they don't use a service, simply leave it blank.

These dates will be used to calculate all the future dates, based on the start date and the frequency.

Once you have put in the start dates for a new client, you're ready to progress.

Schedule							
							2 - Yellow Alert
<small>Select each client and click on their name to bring them to this list. That is so that you can sort them. If any are missing, it will warn you. The cells below where clients have relevant services, will change colour depending on their urgency. When you complete a service for a particular client, simply select the relevant cell and select the data in the drop down list. Only do this once, as it will update the details, doing it twice will put the next due date in. If you would like to see a list of required services, simply check the 'Task List' tab, and then update the new completion date here when done. Updating items here will update the green tabs.</small>							
Client Name	Service 1	Service 2	Service 3	Service 4	Service 5	Service 6	Service 7
Client 1	08 May 2019 (08 May 2019)			08 May 2019 (01 May 2019)			
Client 2		08 May 2019 (29 Apr 2019)					
Client 3			08 May 2019 (29 Apr 2019)				
Client 4	08 May 2019 (03 May 2019)			08 May 2019 (07 May 2019)			
Client 5							



All you need to do here is select the new client from the drop down list, and their schedule springs into action. You will immediately see the colours change, in accordance with your settings. You will see when tasks are due for each client based on the service required.

As a task becomes due, and you complete it, simply select the only option from the drop down list on the respective cell, and it will then reset for the next due date. It is as simple as that. Complete a task, select the option in the drop down list. Job done.

Task List					Page Details		Filters			
In order of importance <small>The tasks required will appear on this sheet, in order of urgency, based on the details on the other tabs. You can use the filters to the right to filter per client or service (or both). Please note that only 25 tasks will appear here, change the page number to see the desired page, but remember to go back to page 1 so that you don't miss anything.</small>					On this page only 2 x Overdue Black 0 Overdue Red 0 Orange Alert Orange 0 Yellow Alert Yellow 2		Leave blank to include all entries Service <input type="text"/> Client <input type="text"/> Page Number <input type="text" value="1"/> of 1			
Status	Date Due	Client	Full Service Name	Short Name	Frequency	Estimated Time	Estimated Price			
Yellow	Fri, 10 May 2019	Client 4	Full Service Name 1	Service 1	Weekly	1:00	£10.00			
Yellow	Mon, 13 May 2019	Client 2	Full Service Name 2	Service 2	Fortnightly	2:00	£20.00			
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At any stage, if you'd like to see a list of all the next tasks to perform in the order that you need to do them, simply click on the relevant tab. The list is there, in urgency order, ready to view.

Would you like to see a specific service, or client? No problem, you can filter this list by client or service to see a specific list. Handy to see what is required.

Last Task Complete		3 - Green 3 - Red		Acceptable days late for each type of project (Intro & Setup)			
Number of Days Before or After Due Date (days late shown as negative)		Number of Days Late as Acceptable					
Here you can see if the last task for each client/service combination was done on time, or done late (and if it was done within an acceptable period. You can set the acceptable late days on the Intro & Setup tab. This only shows the LAST completed task completed for each client/service combination.		Weekly	1	Monthly	5		
		Fortnightly	2	Quarterly	10		
		4 Weekly	4	6 Monthly	20		
				Annually	30		
Client Name	Service 1	Service 2	Service 3	Service 4	Service 5	Service 6	Service 7
Client 1	0			-4			
Client 2		-6					
Client 3			-6				
Client 4	-2			-1			
Client 5							


You can also see the details about the last task completed for each client/service combination. It shows how many days early or late each task was done, and then changes colour depending on your setting (and how many days late a task is allowed to be done).

This shows clearly how successful you (or your staff) have been in completing tasks on time.

Locked for protection [contact us if incorrect]

Business Name

Stuck? Here is a demo video for this product.



If you'd rather watch on YouTube

[Watch on YouTube](#)

	Acceptable	Orange	Yellow
Weekly	1	1	2
Fortnightly	2	2	4
4 Weekly	4	3	5
Monthly	5	5	10
Quarterly	10	10	15
6 Monthly	20	10	15
Annually	30	10	15

On the spreadsheet, there will be various cells that will change colour to warn you of certain activities. This is where you can change the values for each 'colour range'.

The Acceptable is how many days grace is given for each type of job. How many days late is still considered acceptable.

The Orange and Yellow are alerts to show a task is coming up. How many days before a task is due do you want it to turn orange or yellow? Make sure the orange value is less than the yellow for each task type, as it is more urgent.

Lat but not least, the settings. You can make adjustments so that the colours change according to your requirements.

This means that you can decide how late tasks can be done, and when a task becomes orange or yellow alert. You can set these for each frequency period.

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.

£420

This product is created by:



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