CASE STUDY

By AbleOwl

EXCEL AUTOMATION PROJECT

Work done for
Alrick Healthcare

Summary
Alrick Healthcare previously had a long-winded way of generating quotes for customers. In addition to automating the process, they wanted to make the quotes accessible to a number of staff located in different parts of the country.

Price range of work done
US$10,000-20,000.

Video

Play video version of this article

The video is mp4 format.

"The quote tool has automated a manual process that took a staff member 15 minutes to complete, but which now takes 2.5 to 5 minutes max to complete." Rick Mansley, Director, Alrick Healthcare

Quotes with data stored in cloud

Play video version of this article

Alrick Healthcare manufacture and supply high-quality medical and healthcare equipment to individuals and institutions.

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Excel custom applications, presenter-led courses, webinar recordings on 60 one-hour topics, Knowledge Base, hotline support and the study and qualification Certified Professional in Excel for Finance.

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Quotes with data stored in cloud

The solution uses an Excel front-end with data stored in a back-end SQL Server database located in the Microsoft Azure cloud.

The end result is a PDF for sending to prospects

The end result is a PDF, such as that shown below, that lists products quoted for with photos, prices and amounts. At the click of a button, the application creates an email ready to send with the PDF attached.

ALRICK HEALTHCARE

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Organisation	AbleOwl Medical	Proposal date	12-Jun-2017	**Proposal no: 10037**
Attention	John Smith	Phone	123 4567	
Address	1 West St, Sydney, NSW, 2000	Mobile	111 222 3333	
Reference	Example 16	Email	poulton@ableowl.com	
Client ref	AB3			

Code	Description and Specifications	Qty	Unit price	GST	Unit price (inc. GST)	Total $ (inc. GST)	
1000	1000 Series Bed Fixed Height Mesh Mattress Base 900mm Wide Head board only Mattress retainer at footend Overall Length 2190mm | Overall Width 920mm Mattress Base Height 450mm Sleeping Surface 2000 x 900mm Weight Capacity 200kg http://alrickhealthcare.com.au/1000-series/	2	685.30	10%	753.83	1,507.66	
2300D	2300D Double Series Bed 2300D Double bed width Electric Hi Low Auto Regression Backrest Electric Kneebreak Standard 125mm Braking Castors Standard Head & Foot Boards Overall Length 2040mm | Overall Width 1390mm High Position 760mm* | Low Position 270mm* Weight Capacity 300kg Sleeping Surface 2000 x 1370mm Underbed Clearance 170mm Angles Back - 65 degrees Knee 44 degrees http://alrickhealthcare.com.au/2300ks-bariatric-series/	2	2,777.50	0%	2,777.50	5,555.00	
2300Q	2300Q Queen bed size Electric Hi Low Auto Regression Backrest Electric Kneebreak Standard 125mm Braking Castors Standard Head & Foot Boards Overall Length 2040mm | Overall Width 1520mm High Position 760mm* | Low Position 270mm* Weight Capacity 300kg Sleeping Surface 2000 x 1500mm Underbed Clearance 170mm Angles Back - 65 degrees Knee 44 degrees http://alrickhealthcare.com.au/2300ks-bariatric-series/	1	2,904.00	0%	2,904.00	2,904.00	

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Reference	Example 16	Email	poulton@ableowl.com	
Client ref	AB3			

Code	Description and Specifications	Qty	Unit price	GST	Unit price (inc. GST)	Total $ (inc. GST)	
2001WMkII	2001WMKII Series Bed Electric Hi Low Electric Backrest Electric Kneebreak Standard 125mm Braking Castors Standard Head & Foot Boards 1070mm Wide Overall Length 2180mm | Overall Width 1150mm High Position 760mm | Low Position 240mm Weight Capacity 220kg Sleeping Surface 2010 x 1070mm Underbed Clearance 165mm Angles Back - 72 degrees Knee 44 degrees http://alrickhealthcare.com.au/2000-mark-ii-series/	1	2,168.10	0%	2,168.10	2,168.10	
FreightCost	Freight cost	1	50.00	10%	55.00	55.00	

Total excl GST	12,047.70
GST	142.06
Total incl GST	12,189.76

IMAGES FOR ILLUSTRATION PURPOSES ONLY

Alrick Beds are Australian Made, or Australian Engineered and carry a 10 Year Frame and 5 Year Electrical Warranty Guarantee
** PLEASE NOTE: FREIGHT CHARGES WILL APPLY**
New Standard Laminate Colour is Formica Fini Blonde
** This Quotation is valid for 30 days. Please make certain the Quote Number is included on your order to ensure correct prices are invoiced. E&OE
** CUSTOM ORDERS: Non-returnable if not suitable for client. Cancellation of order will incur a cancellation fee to the value of work completed to date.

Kind Regards
Paul Oulton
Alrick Healthcare
poulton@ableowl.com

Product images appear instantly

The user completes entries in a dialog box as shown below. When the user selects a product, the dialog box instantly displays the photo of the product. The connection between Excel and SQL Server is very fast.

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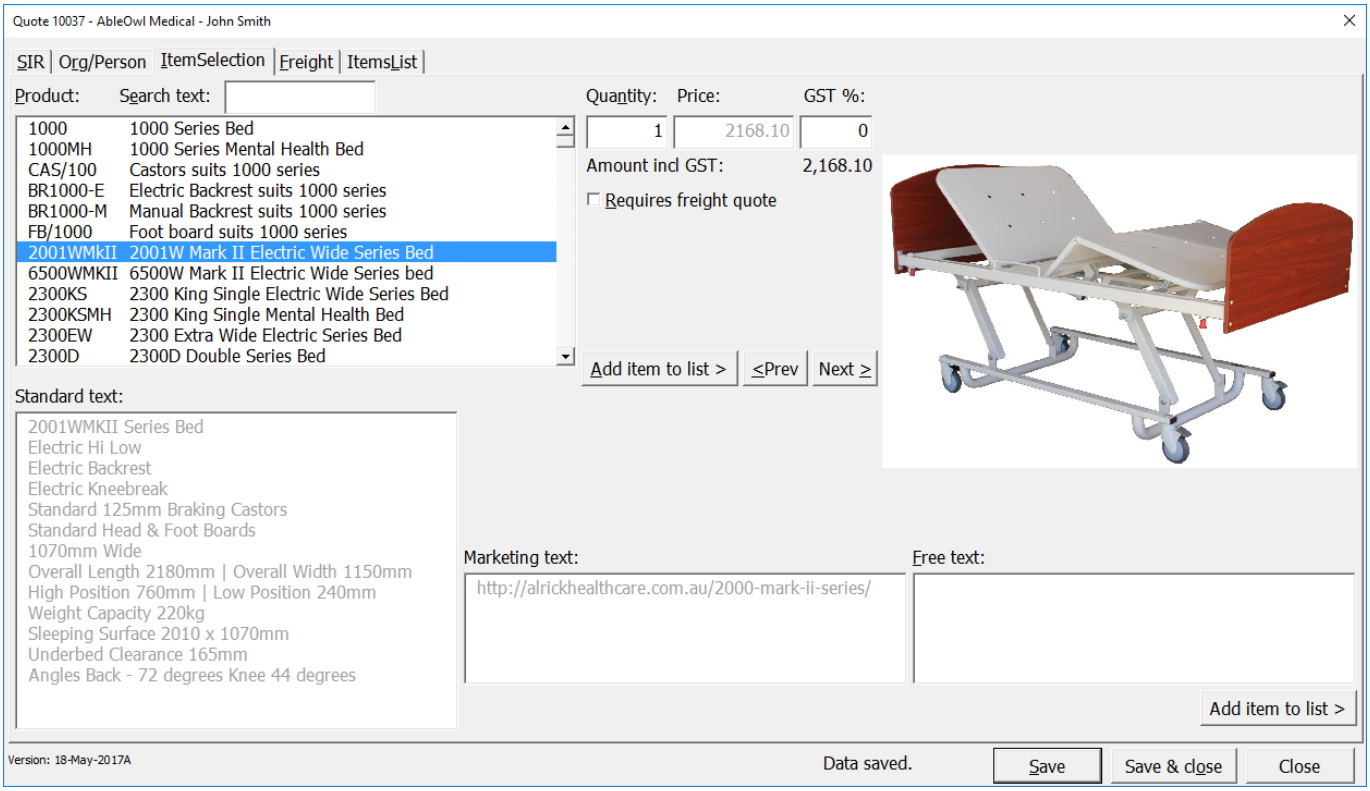
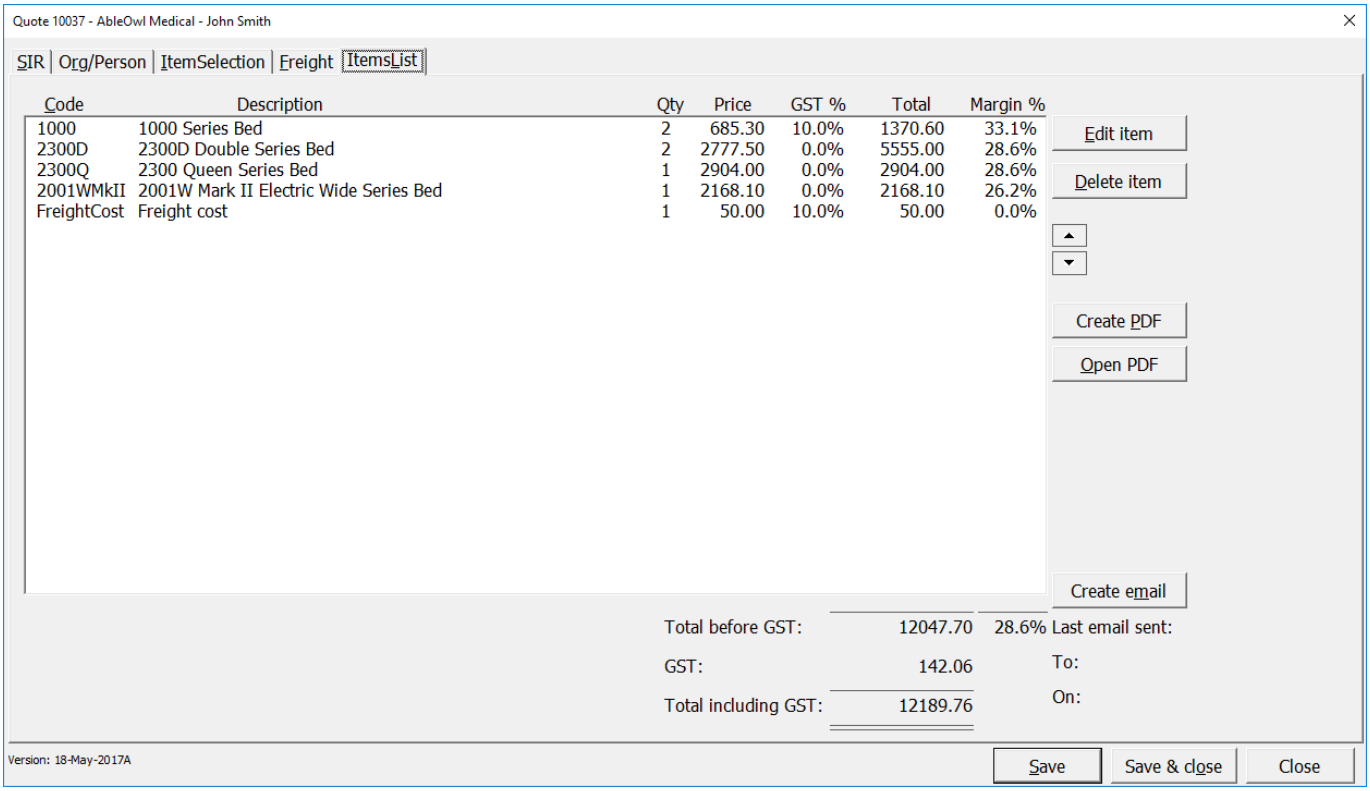


A product image appears instantly on selecting a product.

A dialog box page lists the items selected and also shows the margin

The user builds up the list of items to include in the quote as shown on the ItemsList dialog box page below. The page also shows the margin. When the quote is complete, the user creates the PDF and opens an email ready to send in Outlook.



The list of selected items displays a total and a margin.

SQL Server in the Microsoft Azure cloud costs little

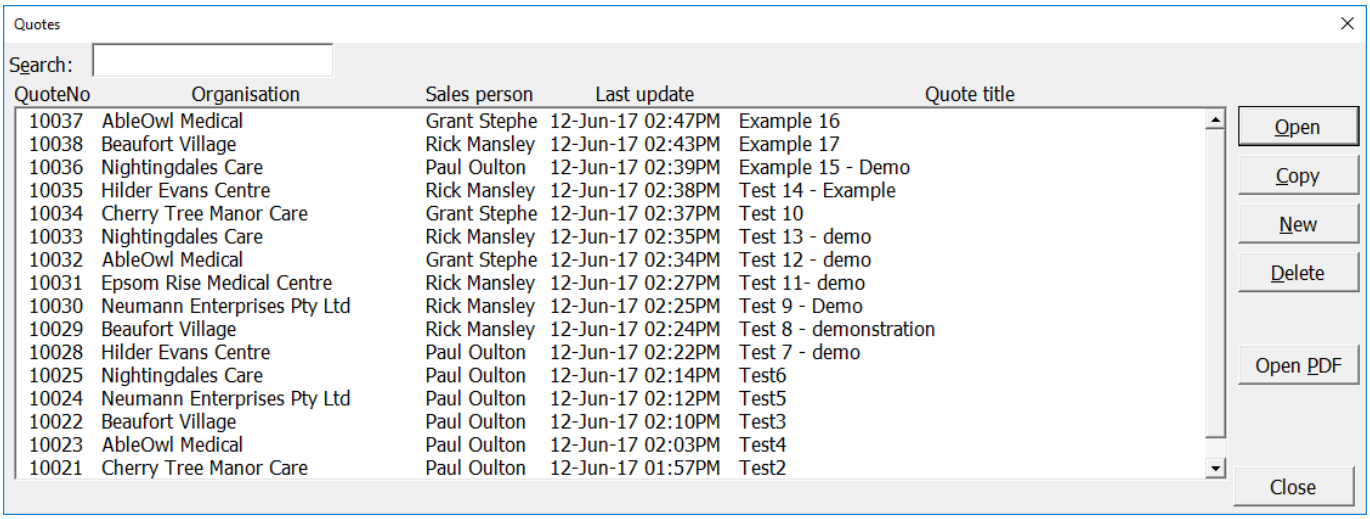
SQL Server in this application is in the Microsoft Azure cloud. The cost for renting such is minimal (less than $20/month).

A logon and password controls who can see what

Access to the data is controlled by a logon and password. Different users have different levels of access: salespeople see only their own quotes while managers can see all quotes.

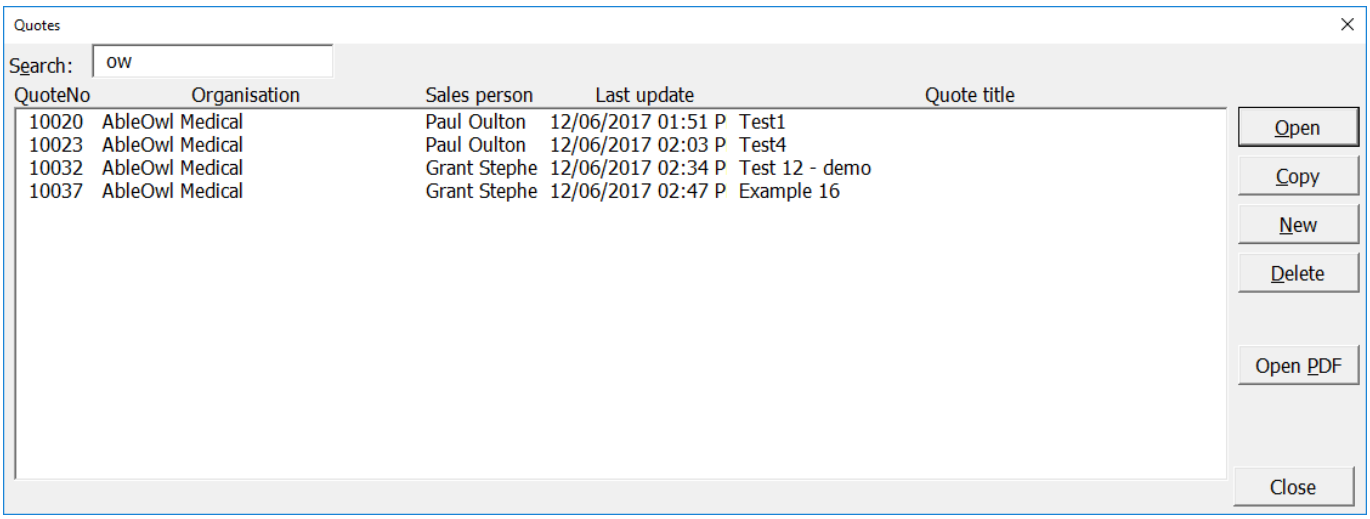
See a list of orders and easily sort it

There is a list of orders such as below. To sort by a certain column, click the column title. To reverse the sort order, click again.



You can filter the list too

You can also filter by typing into the Search box. The dialog box filters to display only those lines that contain the entry typed. The match can be in any column.



A mechanism allows a salesperson to request a special price from a manager

Sometimes, a salesperson wants to offer a special price. To do so, he clicks a certain button that sends an email to a manager for approval. The manager can open the quote, decline or approve the request, make any changes, and click a button to send an email to the salesperson. There is also a dialog box that lists all such requests.

An admin user can make all changes required in Excel

An admin user can make all changes to products, prices and product images from Excel; there is no need to work in SQL Server Manager at all.

Data can easily be extracted to Excel for sales performance reports

Data can easily be extracted from SQL Server to Excel to create various reports on sales performance. Quotes and other data can automatically be loaded into the company CRM application.

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Excel provides a high-quality, low-cost, robust, web-based, long-term solution

Salient points to make about the application are:

- The use of SQL Server in the Microsoft Azure cloud makes the application readily available from any location.
- A logon and password restricts who has access to what.
- Excel is great at combining photos, graphics and other entries to create professional-looking PDFs.
- Excel tightly integrates with Outlook for generating emails.
- Unlike browser-based applications, Excel responds instantly, which enables rapid quote generation.
- The rich functionality provided by Excel means that, in expert hands, high quality custom applications can be created rapidly at a fraction of the cost of that in alternative software.
- The stable Excel platform provides a long-term solution, with minimal maintenance costs, in which internal non-IT specialists retain some control.

Rick Mansley says "a process of 15 minutes to create a quote has been reduced to 2.5 to 5 minutes max".

Rick Mansley, Director, of Alrick Healthcare, says:

"The quote tool has automated a manual process that took a staff member 15 minutes to complete, but which now takes 2.5 to 5 minutes max to complete."

"The quote tool is so easy to use that instead of only two customer support staff looking after every quote, now everyone can produce their own quotes."

"AbleOwl have been great to work with. They have supported us with any issue almost instantly."