

Productivity Applications Microsoft Excel

Digitalise your Business !!

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Lesson's Objectives

- Improve and learn innovative ways to use Excel in your business
- Incorporate the use of Microsoft Excel to improve your productivity

Learning Units

We will go see how to use Excel for:

- Invoices and expenses
- Holiday and Employee Calendar
- Inventory and cash control
- Marketing and Event Management
- Social Media and Gantt Calendar

Lets go!



Practical Examples Excel for daily Business Tasks

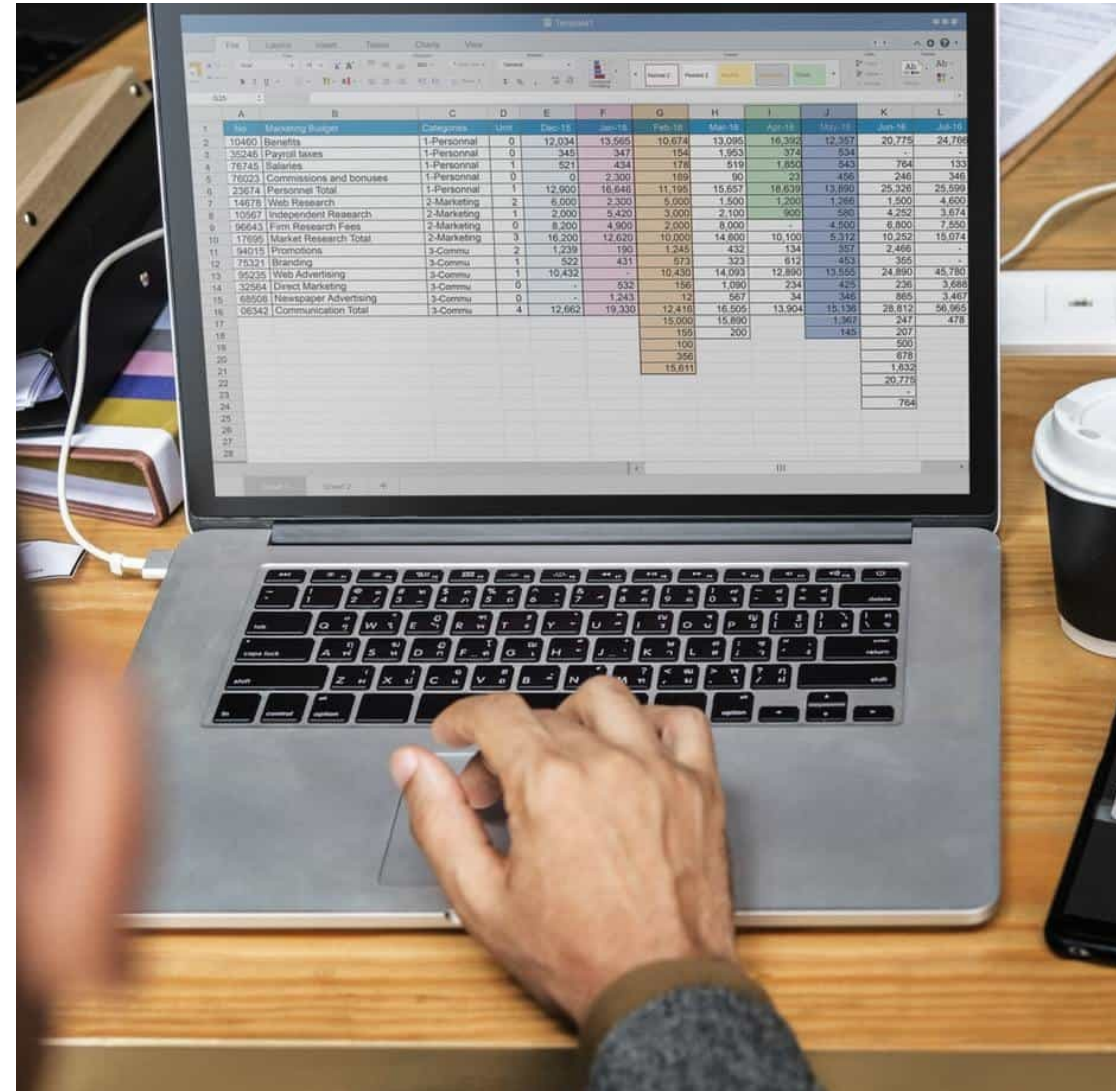
Invoices & Expenses

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Introduction and benefits

- **Efficiency and speed**
- **Data organization and storage**
- **Versatile tool**
- **Reduces errors**
- **Automates processes**
- **High level of compatibility**
- **Consolidate important information**



Client's Invoices & Tracking Expenses

Simple invoice:

- This affordable product sales invoice template will calculate line-item totals, sales tax and deduct any discounts offered.
- It can be modified in Excel to match your company needs.



Client's Invoices & Tracking Expenses

Small Business Expense Sheet

- This budget includes monthly expense sheets
- An annual summary, as well as graphs and conditional formatting to facilitate control of business expenses.



Simple invoice



Logo
Name

Invoice

Your Company Name
Your Company Slogan Here

Date: April 4, 2023
Invoice #: No.
Customer ID: ID

To: Name
Company Name
Street Address
City, ST ZIP Code
Phone

Salesperson	Job	Payment Terms	Due Date
		Due upon receipt	

Qty	Description	Unit Price	Line Total



Business Budget

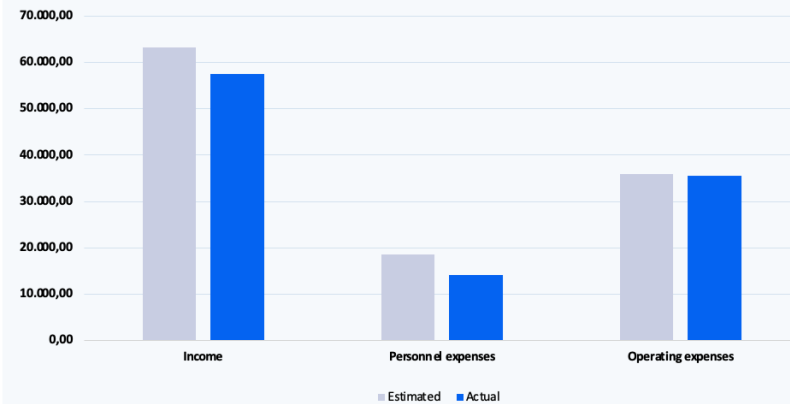
Budget summary

YOUR LOGO
HERE

Date:

Budget area	Estimated	Actual	Difference
Income	63.300,00	57.450,00	-5.850,00
Personnel expenses	18.500,00	14.100,00	4.400,00
Operating expenses	36.000,00	35.530,00	470,00
Balance (income minus expenses)	8.800,00	7.820,00	-980,00

Budget overview



Budget summary | Income | Personnel expenses | Operating expenses

THE END



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Holiday Calendar & Employee Attendance

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Excel for Human Resources

Employee attendance records

This visual employee attendance tracking template will allow you to track the turnout of each of your employees at a glance.

You can use it to create a professional-looking employee attendance record.

Excel for Human Resources

Employee holiday calendar

Allows you to keep track of the days taken by your employees for a variety of reasons ranging from holidays to sick days.

Employee attendance records

EMPLOYEE ATTENDANCE RECORD

Select an employee: **Employee 1**
 Enter year: **2023**

Weekday/Month	SUN	MON	TUE	WED	THU	FRI	SAT	SUN	MON	TUE	WED	THU	FRI	SAT	SUN	MON	TUE	WED	THU	FRI	SAT	SUN	MON	TUE	WED	THU	FRI	SAT	SUN	MON	TUE	WED	THU	FRI	SAT	
January	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	
February				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	1	2	3	4	
March				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	
April							1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
May		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	
June					1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	1	
July						1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
August			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	
September						1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	
October	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	
November				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	1	2	
December						1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31

KEY STATISTICS

Days on leave

4

LAST YEAR 14

DOWN 71%

Working days

260

LAST YEAR 260

UP 0%

Sick days

1

LAST YEAR 4

DOWN 75%

Vacation

0

LAST YEAR 8

DOWN 100%

Bereavement

3

LAST YEAR 0

UP 100%

Other

0

LAST YEAR 2

DOWN 100%

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Practical Examples Excel for daily Business Tasks

Excel for Marketing Management

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Excel for Marketing

Marketing Event Manager

- Plan your marketing event with this accessible budget template.
- Set up various expense categories and estimate the costs of each.
- See at a glance which categories have the highest costs with the category chart.

Channel Marketing Budget

- Use template, possibly in conjunction with a marketing budget, to help you decide how much you want to spend on your marketing channel activities.
- This 12-month accessible budget automatically calculates totals and updates sparklines.

Channel Marketing Budget

CHANNEL MARKETING BUDGET														
	Rate	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
ANTICIPATED SALES TOTAL \$(000)		750	200	500	1,500	1,200	1,500	1,500	1,800	2,000	2,000	2,000	2,000	9,000
PERSONNEL (% OF TOTAL SALES)		110%	110%	110%	110%	110%	110%	110%	110%	85%	85%	85%	85%	
Human resources - headcount	5	5	5	5	5	5	5	5	5	5	5	5	5	
Human resources - cost		25,00	25,00	25,00	25,00	25,00	25,00	25,00	25,00	25,00	25,00	25,00	25,00	300,00
Commission	0,10%	0,75	0,20	0,50	1,50	1,20	1,50	1,50	1,80	2,00	2,00	2,00	2,00	16,95
Personnel total \$(000)		25,75	25,20	25,50	26,50	26,20	26,50	26,50	26,80	27,00	27,00	27,00	27,00	316,95
DIRECT MARKETING ITEMS	Rate	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
DIRECT MARKETING (% OF TOTAL SALES)		100%	100%	75%	40%	33%	25%	20%	10%	5%	5%	5%	5%	
Telemarketing (% of direct sales)		100%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	
Human resources - headcount	3	3	1,5	1,5	1,5	1,5	1,5	1,5	1,5	1,5	1,5	1,5	1,5	19,50
Infrastructure support		25	10	25	10	25	10	25	10	25	10	25	10	210,00
Commission	0,10%	0,75	0,10	0,19	0,30	0,20	0,19	0,15	0,09	0,05	0,05	0,05	0,05	2,16
Training		25	10	25	10	25	10	25	10	25	10	25	10	210,00
Telemarketing total \$(000)		53,75	21,60	51,69	21,80	51,70	21,69	51,65	21,59	51,55	21,55	51,55	21,55	441,66
INTERNET MARKETING ITEMS	Rate	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	



THE END



THANK YOU