

Automated Quoting and Billing System using MS Excel

Contact Name: John P Traub II
Company: NanoLab Technologies
Location: San Jose, California, USA
Company Website: www.nanolabtechnologies.com

Customer Testimonial:

“Paltech Solutions was able to create a custom excel spreadsheet as a solution for quoting/pricing customers jobs until our database was implemented. Paltech Solutions was incredibly easy to work with and had my final template completed much faster than I had hoped. This form was intended to be used as a temporary solution but we still use it today for quotations.”


John P Traub II

Customer Requirement:

- Modify the provided Excel spreadsheet to calculate price and extended price automatically based on product and quantity
- Create a second sheet with the following properties:
 - Logo on the top left; Individuals name and the company name shown
 - Calculations from column D, E, F, G
 - Signature and date at the bottom and format to print on one page

Our Solution:

- The created application met all customer requirements and made quoting/billing customers simple

			Order Complete		
<u>Customer</u>	<u>Company</u>	<u>Job #</u>			
Mike Smith	JFB3	J31			
Product	QTY	Price	Extended		
Product A	1	\$75.00	\$75.00		
Product B	1.5	\$160.00	\$240.00		
Product C	1.3	\$80.00	\$104.00		
Product D	3	\$250.00	\$750.00		
Product E	4	\$160.00	\$640.00		
Product F	23.1	\$200.00	\$4,620.00		
Total			\$6,429.00		

Sample Screen Shot