Zac Wiser

IS 520

Final Project

Executive Summary

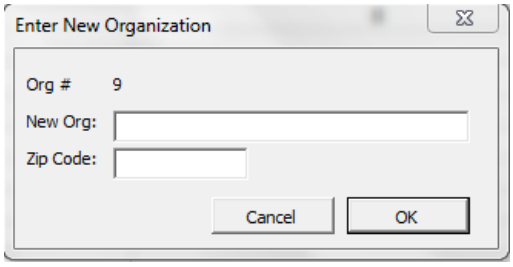
For my project, I built user forms to assist my brother with his new start up. He is trying to introduce a new way for organizations (e.g. schools, sports teams, scout troops, etc.) to raise money. Rather than the kids going door to door and selling something to people, the kids will take a brochure to people. On this brochure, there is a list of approximately 75 different services that people could be interested in purchasing in the coming months. Some examples of these services include lawn care, new dentist, new car, and many other differing items. The brochure asks people to mark any of these services that they are interested in purchasing and explains to them that their names will be sold as leads to local businesses in order to raise money for the local organization.

My project is designed to help my brother's new company keep track of the 1) the organizations they are working with, 2) the individuals within that organization and 3) customers leads that can potentially be sold to local businesses. I decided to write a User Form that would ensure that all the correct information was entered, and that would minimize the amount of data entry that would have to happen. It also keeps track of some statistics that the company will hopefully find useful.

Implementation documentation

The first thing I did for this project was to write a very simple user form that allows them to enter a new organization that they will be working with. I decided that it would be better to have them enter this data in a user form rather than directly on the worksheet because that way, the program will 1) ensure that they enter a zip code along with the company name and 2) make sure the company name is unique. It is important to have a zip code to go along with the organization so that they can have a better idea of what companies to go to in order to sell leads. Ensuring that the organization has a unique name is critical for keeping track of data associated with specific organizations. It is also likely that some of the organizations they will be working with will be sports teams with very similar names. For example, they could potentially work with multiple soccer teams called Wasatch Thunder because there is a Wasatch Thunder team for most age levels.

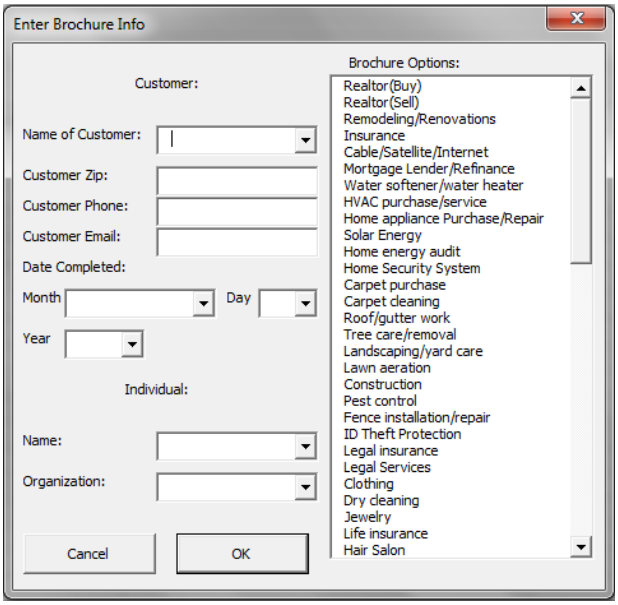
The *New Organization* User form.



I also built a second, far more complex, user form that will be used each time the company receives a filled-out brochure. This user form will be used more often and has more functionality. As the company grows, it hopes to move away from the brochure system to a website where people will be able to select

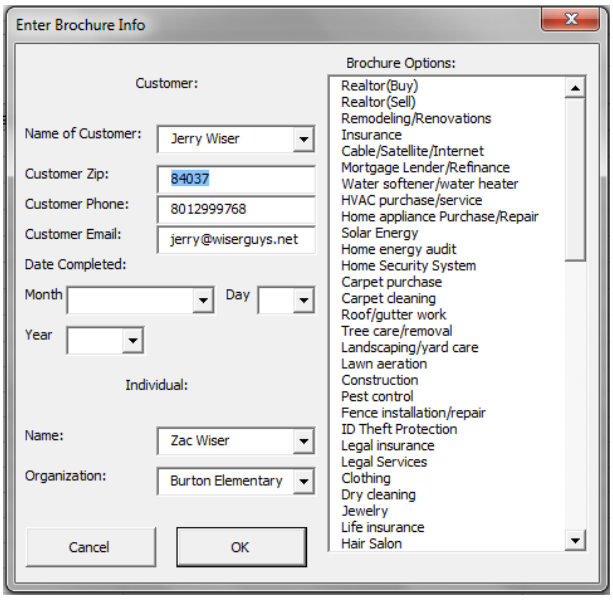
services they are in need of. Until then, however, they will have to enter the information from each brochure manually. My goal with this second user form was to make this process as painless as possible while still ensuring that the data was entered accurately.

The *New Brochure* User form.



Within the user form there are multiple combo boxes and the list box that populate when the user form is initialized. The Brochure Options List Box takes its values from a sheet within the workbook. This will allow the users of the workbook to easily change the brochure options which will almost certainly happen regularly. If the brochure is received from a previous customer (which the company hopes to receive lots of), all of the information other than the date boxes and the brochure options (because those are almost certainly going to be different than the previous brochure) auto-fill once the cursor leaves the "Name of Customer" box.

The *New Brochure* User form auto-fills once a customer who already exists in the database is selected.



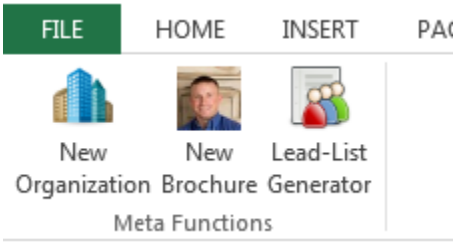
If any information about the customer needs to be edited, the user can simply change the data in the boxes and the database will automatically update when the “OK” button is pushed. If the customer entered on the user form is not already in the database, he or she, along with all of the information entered, will be placed in the database along with a unique customer number. Similar to the New Organization user form, the New Brochure user form requires that most of the boxes be filled out in order to execute the user form. The only box that can be left empty is either the email or the phone number, but not both. It is likely that customers will only give one form of communication, and I wanted my program to work in that scenario.

The Individual section of the New Brochure user form behaves similarly to the Customer section except that it can be auto-filled if the customer is already in the database. But just as it is with a new customer, if the individual entered into the combo box is not already in the database, he or she will be added to it when the “OK” button is pushed.

In addition to updating the information in the customer and individual databases when the “OK” button is pushed, there is also an entry to a table on a spreadsheet called “ReturnedBrochures.” This sheet keeps track of each individual brochure that is returned regardless of whether it is a repeat customer or a new customer. This will make it easy for workbook users to examine the data. For example, it can easily be sorted by organization or zip code. It could also be put into a pivot table for further inspection.

As I mentioned before, one of my main goals in doing this project was to make it as easy as possible to enter data into the workbook. I decided that customizing the ribbons would help with that, so I made a tab for company-specific functions that will make it easy for users to pull up the user forms they need to use.

Customized Ribbon



I also wanted to make the data on the spreadsheets easy to read in case any users wanted to find information that way. A difficult aspect of this was that certain cells on a couple of the sheets contained a string of all the selected list box items from the New Brochure user form. Depending on how many options a customer selects, this string can be very long. I didn’t like the look of having one cell that just keeps going and going across the screen. So I wrote code within the sheets that contained those cells that would automatically re-size the rows when the user clicked on a cell with one of these long strings. The rows go back to their normal size when the user clicks out the cell. This makes the data look far more organized and makes it easier to read when the user is just looking at individual spreadsheets.

Cells automatically re-size based on the amount of information in them.

Individual(s) who gave them brochure	Options checked on brochure
Zac Wiser	Realtor(Sell), Cable/Satellite/Internet, Tree care/removal, Nail Salon, Accounting services, Physician, Massage therapy, Auto insurance, New tires, Home Theatre/Audio Systems
Kylie Hekking	Carpet purchase, Roof/gutter work, Construction, Legal

Individual(s) who gave them brochure	Options checked on brochure
Zac Wiser	Realtor(Sell), Cable/Satellite/Internet, Tree
Kylie Hekking	Carpet purchase, Roof/gutter work, Construction, Legal
Kylie Hekking	New Dentist, Lawn Care, New Car, test 1, test 2, test 3,
Zac Wiser	New Dentist, Lawn Care, New Car, test 1, test 2, test 3,
Jason Boyd	Realtor(Sell)

Discussion of learning and conceptual difficulties encountered

By far the most difficult part of this project was figuring out how to organize and manipulate the data. This company has not distributed any brochures yet, so they only had a very loose idea of what they wanted. It required lots of communication in order to give them a product that they will find useful. I am sure that after they use this workbook for a few weeks, there will be things that they want to adjust. I did my best to write my code in a way that will allow them to make changes. There were a number of things that I wanted to include in this project that I just did not have time for. For example, I was hoping to include a process for when the company receives revenue and how to keep track of the amount of revenue which each individual and organization was responsible for.