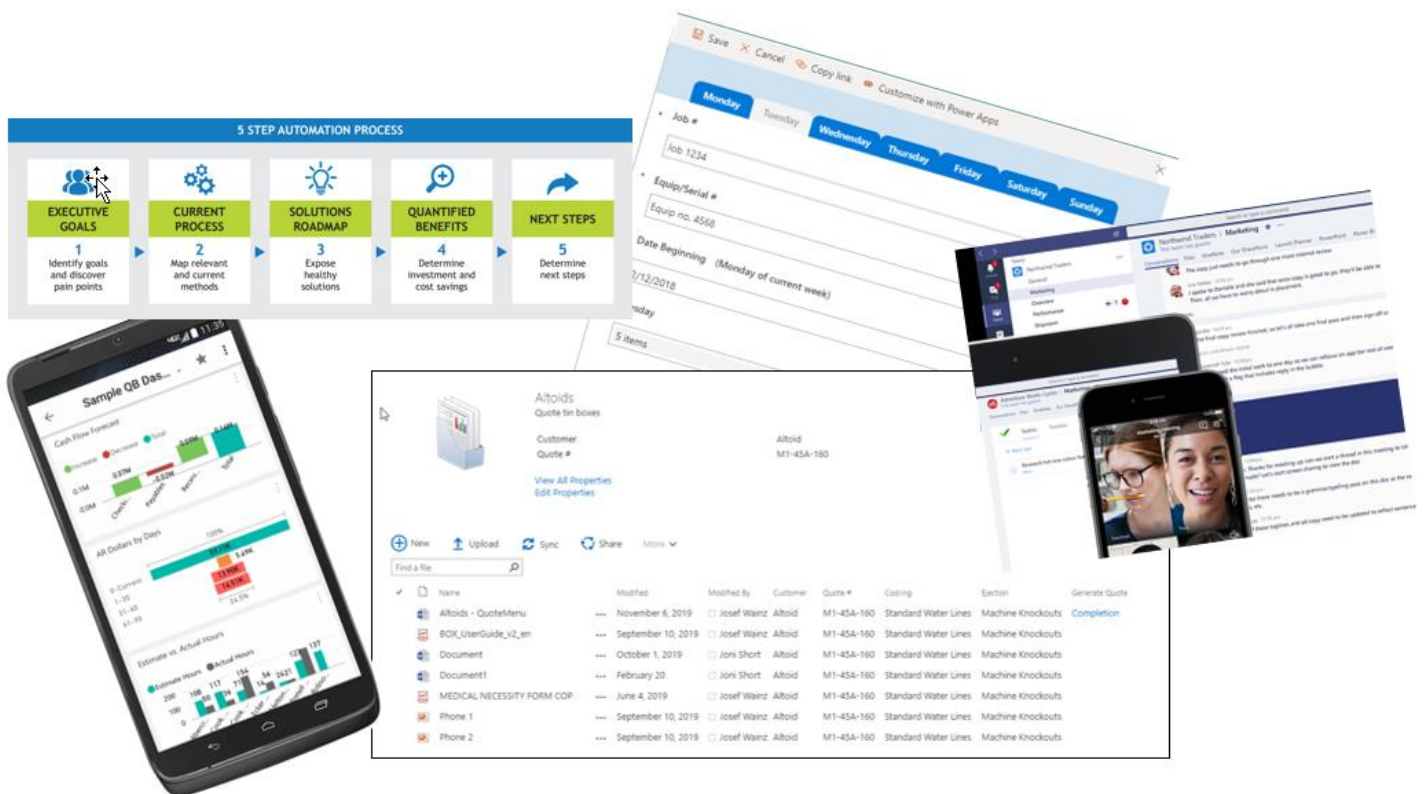# Samples

A Collage

You will find 3 different documents assembled into this single PDF. These samples describe what you can do with our help.

Documents:

1. In *Question Your Process* look for:
   a. Case Study: SharePoint
   b. Case Study: Middleware
   c. Case Study: Business Intelligence
   d. 5 Step Automation Process
2. *Microsoft Teams Starter Kit*
   a. A strong example of how our guidance gives you an advantage around productivity and cost
3. *Dash*
   a. A beautiful intersection of QuickBooks and Power BI providing key information for C-levels running businesses and making decisions

Question Your Process
Disturb Profitability and Productivity

Your data is valuable. Take care of it, invest in it and simplify working with it. We give companies the business intelligence and software solutions needed to compete in today's global marketplace. We do this by questioning your process, moving profitability and productivity.

- Tired of investing in IT solutions that don't provide you with an ROI?

- Your team is working differently, why aren't your systems?

- Wasting resources with the systems you have in place?

- Is your team relying on spreadsheets for manual reporting?

- Are you missing out on opportunities because you don't integrate with customer systems?

- Don't discount the value of your data! It is bound to your products and services.

CASE STUDY: SHAREPOINT

A small pharmaceutical packaging company was spending 2 hours a week chasing down the status of orders when customers would call.

The process looked like this: "I'll call you back with the information." Then staff walks the plant, looking for a clipboard with the order, it could be anywhere. Once the clipboard is found, the customer can be called back with the information.

We implemented a few simple SharePoint lists to track purchase orders. Whenever the status of the order changes, an email indicating the new status is sent to the customer.

This solution made it a 30 second process to check the status of an order. The email status updates stopped the time wasting phone calls completely.

$7,300 Saved Annually

CASE STUDY: MIDDLEWARE

A manufacturer was wasting 12 hours per week using manual data entry into their SAP system and online screening service.

Using simple middleware, leveraging SQL Server and SharePoint, an automated process runs 2x each day and retrieves new customers from SAP, packages them and digitally submits them to the online screening service. Any records with formatting issues are reviewed and adjusted in SharePoint.

The compliance department views a daily online report on any new customers that did not pass their screening process.

12 HOURS PER WEEK → **5** MINUTES

$40,000 in Profit Annually

CASE STUDY: BUSINESS INTELLIGENCE

A supplier and their manufacturing customer had some disruptions to the normal flow of raw materials. Communication on usage and inventory was random, requiring the supplier to guess at what to deliver.

Using Power BI, against the ERP systems for both supplier and customer, they are now sharing real-time daily usage and inventory data back and forth. Now, at any time, the supplier can see daily usage directly from the customer's ERP system. In reverse, the customer, at will, can see inventory from the supplier's ERP.

Between the 5 hours a week wasted on manual reporting, the lost production due to down machines or changeover and the extra inventory being carried to anticipate what is needed this solution was a real win for both companies.

$93,600 in Unnecessary Costs

turtleworks

Harness Data | Simplify Decisions | Deliver Results

THE TURTLE WORKS PROCESS

Often applying a roadmap, during the process of consulting we quickly understand your business, and your pain. The Turtle Works Team identifies solutions that eliminate the drag on your profitability; including the ROI of those solutions. You can enjoy the simple decisions to determine next steps based on the information you and Turtle Works now have.

5 STEP AUTOMATION PROCESS

EXECUTIVE GOALS	CURRENT PROCESS	SOLUTIONS ROADMAP	QUANTIFIED BENEFITS	NEXT STEPS
1 Identify goals and discover pain points	**2** Map relevant and current methods	**3** Expose healthy solutions	**4** Determine investment and cost savings	**5** Determine next steps

NOT EVERY PROBLEM IS A NAIL

Our Solutions and People Exceed At:

- SharePoint Portals / Intranets
- Business Intelligence Solutions
- Middleware / Integration
- Dashboards / Metrics / Reporting
- Workflows
- Databases
- Document Management
- Mobile Tools

Uncover the wasted time and money holding your company back.

ABOUT TURTLE WORKS

Turtle Works, LLC, is a business software and process application development company. We give small and medium-sized businesses the business intelligence and enterprise software solutions needed to compete. The products and services you provide, are tightly bound to the data used to manage and track them. Effective collection, recognition, and utilization of that data – from whatever source, in whatever format – determines business success.

We are focused in our approach on service and earnings. We give you the tools, technology and training to harness the data, make better decisions, and deliver the results that matter.

▶ **CONTACT US TO LEARN MORE**

586-206-8960 • http://turtle.works • solutions@turtle.works

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Harness Data | Simplify Decisions | Deliver Results

Microsoft Teams Starter Kit

An Introduction to New Productivity

Start with 5 Hours of Setup, Training and Tools

Leave with Confidence and Support

Using Microsoft Teams drives remote working. But sometimes we don't completely understand how to use technology and have to ask for guidance. We make that easy for you with a Microsoft Teams Starter Kit. A Teams guide will train, design, bring templates and lend support to collaboration, file sharing, web meetings and your business.

Receive 5 Hours of Attention

- 2 hours for: Guidance, Setup and Configuration
- 1 hour for: Group Training
- 2 hours for: Support for help, answers and customization

Get Several Business Assets

- A moderated, organization wide Team:
    - Announcements
    - Companywide Calendar and Meetings
    - Access for all employees to critical Information and Files
    - Launch point to core company systems
- 2 complete Department teams including useful apps
    - Your choice of Sales, Finance, Operations, HR, Quality or Facilities
- A template for all Department teams

Fix These Issues

WHAT IS THE RIGHT WAY TO SETUP SECURITY?

HOW DO I MANAGE PROJECTS AND TASKS?

MY MICROSOFT TEAMS IS OUT OF CONTROL

HOW DO I COLLABORATE WITH MY STAFF?

I NEED A MEETING SPACE

HOW DO I STRUCTURE TEAMS AND CHANNELS?

Reduced to $525 in June

Schedule Call

TURTLE WORKS
Productivity Solutions

586-206-8960
https://turtle.works
solutions@turtle.works

Dash

QuickBooks and Power BI - It Adds Up

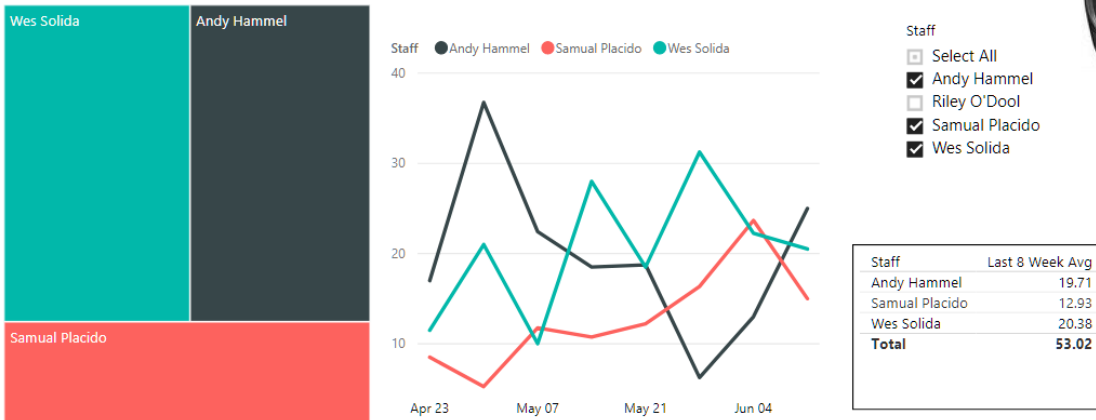**QuickBooks**

Power BI

Leverage QuickBooks and Microsoft Power BI, to have the right business answers at your fingertips. Have confidence in what staff is doing. Know how much money is outstanding with clients. Know how projects are unfolding. Be comfortable with cash flow.

Use proven Power BI modules that connect to QuickBooks to access KPI's, metrics, dashboards and reports that ease your mind. See at a glance cashflow, accounts receivables, proposals, project hours, billable hours, staff performance. From a laptop, tablet or phone, see how cash on hand, payables and receivables add up; know your cashflow position.

Based on cashflow, determine whether you need to push some customers to pay their outstanding invoices. Using the AR module, determine which customers to call, how much they owe and how late they are.

Easily evaluate your sales funnel. See how many proposals are out, how much they are worth and who they are with.

With the right metrics, know where to spend time and energy: sales, operations, profitability or cashflow.

View all open projects. Quickly evaluate estimated hours vs actual hours for each open project.

Nothing helps employees make better decisions, than clear information. One glance at the Estimated vs Actual Hours report equips them to answer time management questions regarding priorities, wrap up or additional product features.

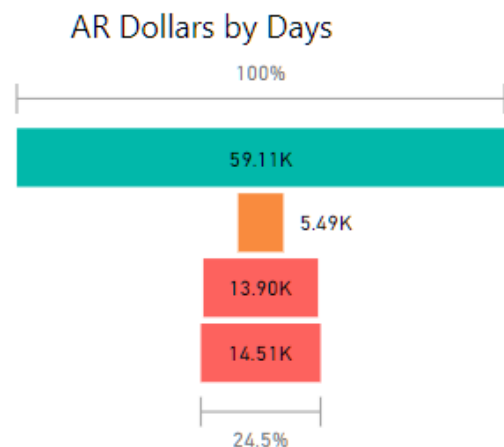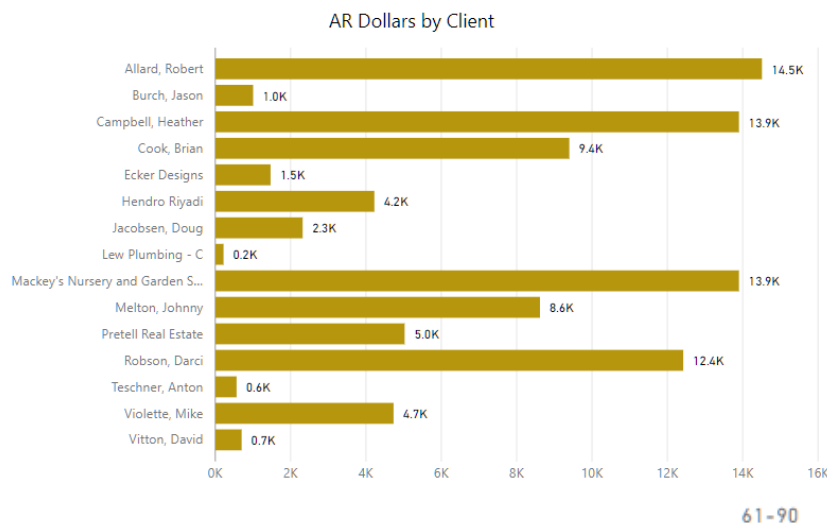During staff meetings, present clear data and visuals describing performance over the last 8 weeks. Review billable hours, how their performance compares to their goals and how their performance compares to the team.

Staff	Last 8 Week Avg
Andy Hammel	19.71
Samual Placido	12.93
Wes Solida	20.38
Total	**53.02**

Staff	Target
Riley O'Dool	10
Samual Placido	15
Andy Hammel	20
Wes Solida	20

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Weekly Hours

Staff	04/23/2017	04/30/2017	05/07/2017	05/14/2017	05/21/2017	05/28/2017	06/04/2017	06/11/2017	Total
Andy Hammel	17.00	36.75	22.42	18.50	18.75	6.25	13.00	25.00	157.67
Samual Placido	8.50	5.25	11.75	10.75	12.20	16.35	23.67	15.00	103.47
Wes Solida	11.50	21.00	10.00	28.00	18.50	31.25	22.25	20.50	163.00
Total	**37.00**	**63.00**	**44.17**	**57.25**	**49.45**	**53.85**	**58.92**	**60.50**	**424.13**

Weekly Percentage

Staff	04/23/2017	04/30/2017	05/07/2017	05/14/2017	05/21/2017	05/28/2017	06/04/2017	06/11/2017
Andy Hammel	85 %	184 %	112 %	93 %	94 %	31 %	65 %	125 %
Samual Placido	57 %	35 %	78 %	72 %	81 %	109 %	158 %	100 %
Wes Solida	57 %	105 %	50 %	140 %	93 %	156 %	111 %	102 %

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Current Modules

The existing modules are:

- Open Proposals
  - Number of Proposals
  - Total Proposal Dollars
  - Proposal Breakdown
- Accounts Receivables
  - AR Dollars by Days (Current, 30 days, 60 days, 90 days, 91+ days)
  - AR Dollars by Client
- Project Hours
  - Estimated vs Actual Hours
  - Slice by Customer, Project and Status

- Cash Flow Forecast
  - Waterfall of credits/debits
  - AP Listing
  - AR Listing
- Billable Hours
  - Weekly Hours
  - Rolling 8 weeks
  - Total Hours by Staff
  - Weekly Percentage
  - Weekly Average by Staff
  - Slice data by staff

New modules are created based on customer needs. We listen to what indicators help you drive your business better.

AR Dollars by Client

AR Dollars by Days

Custom Solutions

Consolidate QuickBooks data with data stuck in Excel, online apps or internal systems. Power BI breaks through barriers, pulling together data from 100's of different locations, into 1 data model. The consolidated reporting gives you 1 place to understand your business.

With our understanding of QuickBooks, databases, online services and data modeling, we design and build data sets, models, reports and dashboards to satisfy the situation and need.

Call us to harness your data, simplify your decisions and help deliver results.