

LEVEL 4 ASSESSMENT PORTFOLIO

Software Solutions for Business

Component 1: Coursework Portfolio

Module	Details
Programme	CertHE Computing Skills for Workplace
Module	Software Solutions for Business
Module code	ACCA4026
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Student ID	_____
Submission date	1 September 2026
Indicative word count	Approximately 5,000 words (excluding references and figure captions)

Academic integrity statement

I explain software topics and document simulated practice in my portfolio. The practical evidence test data are fake and contain no actual, confidential, or sensitive company information. References recognise all external sources.

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Introduction

Modern firms use connected software, not just one. A small retailer may build and operate an online shop, record sales and stock, create customer-facing documentation, assess performance, interact with colleagues, and coordinate operations in one day (Atlassian, 2026). Software solutions boost corporate competence when they fit a clear procedure and workers know their constraints. This portfolio examines technologies for GreenThread Retail, a hypothetical sustainable-clothing microbusiness (Shopify, 2026b). The business environment is simulated: online sales of modest products, a distributed staff, and simple stock and task control. The scenario allows feature demonstrations without customer or employer data (Wix, 2026b).

Portfolio is organised on four required software areas. It compares Shopify and Wix as e-commerce builders, explains business thought mapping, tests Word, PowerPoint, Excel, and Access, and records two Excel feature tests (Microsoft, 2026e). It studies Microsoft Teams and Trello and presents one practical test each (Wix, 2026a). The discussion uses current vendor documentation because features and availability change. Read vendor information critically: it explains desired functionality, but a business must assess suitability, accessibility, cost, data protection, security settings, and staff training before using a technology (Microsoft, 2026c).

Task 1: e-Commerce website builders/software solutions

1.1 Shopify

Shopify is a hosted commerce platform that lets businesses develop online stores without server infrastructure. This website builder uses themes, visual editing, and optional AI-assisted design (Microsoft, 2026d). In one administration section, a seller can add a product catalogue, photos, descriptions, prices, tax settings, payment methods, fulfilment options, and customer communications. Shopify (2026a) claims their builder is no-code for basic activities but allows CSS or Liquid theme updates. This blend is ideal for a company that needs a quick start yet may need a more unique shopfront.

Integration is GreenThread Retail's operational value. Connect product records to inventory, orders, shipping, and sales reporting (Microsoft, 2026a). Instead of processing orders in one system and lowering stock in another spreadsheet, an integrated workflow reduces data entry and transcribing errors. The checkout is meant for online sales, not just adding a payment button to a brochure page (Microsoft, 2026b). Shopify (2026b) describes themes, order management, inventory, and analytics as fundamental commerce services. A shared dashboard lets owners compare products, channels, and order trends, which may improve decision-making (Shopify, 2026a).

Some restrictions apply. More features can increase monthly subscription and app charges. A firm can also rely on platform templates, regulations, and connectors. Quality reporting requires correct product and order data and technical competence or a developer for custom adjustments. Thus, GreenThread should establish product codes, refunds, and user rights before launch. Instead of just

analysing the tool's visual design, it should test the entire customer journey: browsing, payment, confirmation, packaging, shipment, and return (Microsoft, 2026a).

1.2 Wix eCommerce

Wix is an e-commerce website builder. A visual drag-and-drop editor, templates, and an app store are its specialities (Microsoft, 2026c). The Wix (2026a) platform offers website building, business administration, and marketing capabilities. Customer accounts, wish lists, tracking numbers, refunds, and email subscriptions are available at checkout on Wix Stores (Wix, 2026a). This makes Wix appealing to small businesses who value brand story, editorial content, and page design as much as a big catalogue (Shopify, 2026b).

Wix might publish a visually appealing sustainability story with product pages for GreenThread. It supports SEO, blogs, forms, and promotions. The page editor lets non-technical workers quickly update basic material, speeding up campaign idea to publication (Wix, 2026b). Instead of developing every feature in-house, its app marketplace provides an ecosystem (Wix, 2026b). This may improve workflow since one person can change a seasonal landing page, execute an email sign-up campaign, and publish a new product without a web developer (Microsoft, 2026c).

Trade-off: governance. Many programs might cause uneven charges, duplicate data, and slower sites (Microsoft, 2026b). Staff not using templates can generate uneven designs with drag-and-drop layouts' visual independence. Paid plans unlock sophisticated selling and analytics options. Before choosing a service, a firm should consider transaction fees, domain ownership, export possibilities, accessibility, and UK data protection (Shopify, 2026a). Shopify is more commerce-focused for operational scale, but Wix is good for content design and simplicity.

Decision factor	Shopify	Wix	GreenThread implication
Primary orientation	Commerce-first platform	Website/design platform with commerce	Choose Shopify if order operations are central
Ease of editing	Theme editor; advanced customisation available	Highly visual drag-and-drop editor	Use approved templates to protect brand consistency
Operations	Orders, inventory, shipping and analytics	Store functions plus broad business tools/apps	Avoid duplicate apps and duplicate customer data
Main risk	Recurring subscription/app dependence	Feature and app sprawl	Review costs, access and exit options quarterly

Task 2: Mind-map of contemporary software applications

2.1 Meaning and business benefits of mind mapping

Mind maps show related thoughts. From a central theme, it branches into categories, subcategories, and instances (Microsoft, 2026b). It displays relationships and objects simultaneously, unlike a sequential notes page. Mind mapping aids early problem-solving, planning, meeting preparation, and service design in business. Create it on paper, in software, or in collaborative whiteboards (Atlassian, 2026). The goal is to make a complex area transparent so people can see gaps, priorities, and links, not for adornment (Shopify, 2026a).

A benefit is faster common understanding. Managers may discuss “software for operations” like finance, customer database, messaging, reporting, or cyber security. A mind map clarifies categories and reduces team discussion. Divergent thinking is supported when members add options before the group decides. This helps small businesses choose tools because the cheapest or most familiar software may not solve the whole process problem (Wix, 2026b).

Another benefit is planning. Work breakdown structures, training plans, and prerequisite lists can be created from branches (Microsoft, 2026c). Project-management branches can lead to Trello tasks, owners, and deadlines, while data branches can lead to shared spreadsheet or database decisions. Mind maps cannot substitute thorough analysis. It does not demonstrate ROI, security, or data ownership. Thus, a comparison table, pilot test, and implementation plan should follow.



Figure 1. Mind map of contemporary applications supporting day-to-day business operations.

Six related locations are shown in Figure 1. Communication tools coordinate people, office applications create and analyse information, customer and sales tools manage transactions, project tools plan work, data and security controls protect and interpret data, and people/finance systems enable staffing and financial compliance (Microsoft, 2026e). The map is intentionally broad. GreenThread would determine its priority process, assign data owners to each system, and construct a modest integration map of customer, product, and financial data for real deployment.

Task 3: Office applications for creating, storing, presenting and analysing information/data

3.1 Microsoft Word

Business documents are created, edited, formatted, stored, and shared in Microsoft Word. Styles, templates, tables, spelling and grammar tools, comments, track changes, headers, page layout, mail merge, and PDF export are its main features (Shopify, 2026a). A style-based report can use the same headline, body content, and table formatting. This enhances readability and lowers paragraph formatting time in the office (Shopify, 2026b). Comments and documented modifications are extremely useful when reviewing a policy, proposal, or contract by multiple people.

Word might be utilized for GreenThread Retail's staff induction guide, returns procedure, supplier letter, risk assessment, meeting minutes, and monthly performance summary. Staff start with authorized branding and wording using a template (Wix, 2026b). Mail merge can personalize letters and labels from a regulated data set. Documents can be reused, edited, and evaluated, increasing efficiency (Shopify, 2026a). Headings, tables, and proofing tools assist readers identify crucial information, improving communication (Microsoft, 2026c).

Word has limits. Live order records should not be stored in it because it is not a database. Manual formatting instead of styles can make long papers inconsistent, and collaborative editing requires version control. Permissions and secure storage are needed for sensitive data; email attachments easily create duplicates (Shopify, 2026b). A shared location, meaningful file names, agreed templates, and an owner who approves updates are good business practices (Wix, 2026a). Microsoft (2026a) states that Word facilitates collaboration and review, but only when the team agrees on how to use them.

3.2 Microsoft PowerPoint

Microsoft PowerPoint presents ideas to an audience. It includes slides, text, charts, photos, diagrams, video, speaker notes, and animation (Microsoft, 2026d). It transforms structured messages into visual narratives, its main economic benefit (Microsoft, 2026a). Managers may quickly highlight sales trends, project decisions, and training topics (Wix, 2026b). Slide Master helps companies standardize layouts, typefaces, and logos so employees can produce consistent documents.

GreenThread may utilize PowerPoint to launch an online promotion, teach temporary personnel on order packaging, discuss quarterly results, or propose a product partnership. Excel charts convey

trends faster than huge tables. Speaker notes help presenters, while handouts or PDFs can be shared after meetings (Microsoft, 2026b). PowerPoint facilitates communication and decision-making, not just design. A brief slide with a clear conclusion can assist senior colleagues make a choice.

Oversimplification is the main drawback. If a PowerPoint presentation has nice images but no source, date, or scale, it can mask ambiguity. Too much text, motion, or color detracts. PowerPoint is not good for extensive instructions that users need to seek later; a Word guide or knowledge base may be better. One primary point per slide, understandable contrast, alternate language for important visuals, data labels, and source lines beneath charts are best practices (Microsoft, 2026c). The presenter must explain the evidence, not read the slide (Atlassian, 2026).

3.3 Microsoft Excel

Microsoft Excel organizes, calculates, analyzes, and visualizes structured data. Workbooks have worksheets with cells, formulas, tables, charts, and data-validation criteria (Microsoft, 2026c). Numerical computations, IF, lookup, filters, conditional formatting, PivotTables, and what-if analysis are major functions. Excel is popular because users may quickly design a workable model without database development knowledge. Formulas calculate using cell references, constants, operators, and functions, per Microsoft (2026b).

Excel's GreenThread stock-control and order-analysis worksheet is straightforward. Structured tables can store product code, stock level, re-order threshold, unit cost, and supplier information (Shopify, 2026b). IF functions detect re-order conditions, while VLOOKUPs obtain prices and descriptions from master lists (Shopify, 2026a). Filters let users analyze categories, while PivotTables summarize monthly orders per product. Charts turn tables into decision cues. These capabilities decrease manual calculation and highlight exceptions, improving workflow (Shopify, 2026b).

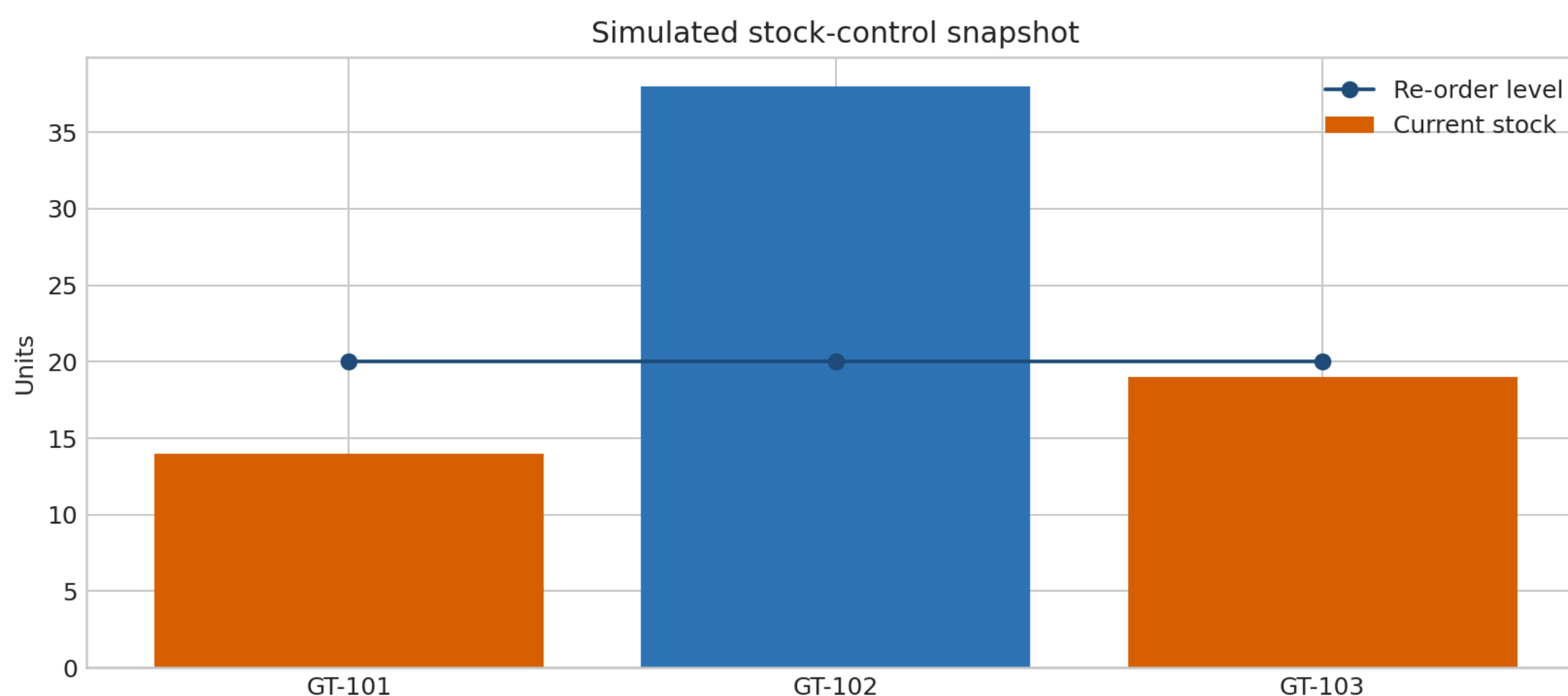


Figure 2. Simulated Excel chart: current stock compared with the re-order level.

Excel's limits demand management. A spreadsheet may include concealed rows, copied values, faulty calculations, or broken linkages without warning (Microsoft, 2026d). VLOOKUP requires the lookup key to be in the left-most column of the specified table and can fail if ranges are mismanaged (Atlassian, 2026). VLOOKUP is useful for learning and legacy workbooks, even tho XLOOKUP is more flexible. Shared spreadsheets risk simultaneous editing. GreenThread should use an Excel Table, lock formula cells, validate product codes, create a change log, and compare totals to source records to control

these risks (Microsoft, 2026b). Excel works well for small-to-medium analysis but not for a large multi-user transaction database.

3.4 Microsoft Access

Relational database software Microsoft Access. Unlike a spreadsheet, it stores related records in distinct tables and links them with keys. Key features include tables, primary keys, relationships, queries, forms, reports, validation rules, and macros. Companies may keep customers, orders, products, and suppliers in different tables (Microsoft, 2026d). Order tables can relate to Customer tables and order-line data using OrderID. The customer's address is stored once rather than retyped in each order row.

Access might prototype a tiny working database for GreenThread. A query could display products below the re-order point, a form could let staff routinely enter new products or suppliers, and a report could indicate outstanding purchase orders (Atlassian, 2026). Referential integrity prevents orphan entries, such as orders linking to nonexistent customers. Queries allow businesses to ask specific queries like “which product category created the highest sales value this month?” without manually merging sheets.

Access is limited. It requires database design skills for relationships, data kinds, and normalisation. Poor table design replicates spreadsheet issues in a more complex system. Desktop databases may not be ideal for large, cloud-first, or concurrent systems (Shopify, 2026a). Access, backup, retention, and GDPR remain role-based. Use a basic schema, test it with fictional data, document the data dictionary, and migrate to a more scalable cloud database if growth, remote access, or integrations require it (Wix, 2026b). Access should be chosen for its relationship structure, not familiarity.

Application	Main purpose	Major business benefit	Important limitation/control
Word	Create and review documents	Templates, styles and tracked changes improve consistent communication	Not a transaction database; use version control and permissions
PowerPoint	Present messages and evidence	Slides, charts and notes support briefings and training	Avoid information overload; cite chart data
Excel	Calculate and analyse structured data	Formulas, tables, charts and PivotTables highlight patterns	Formula errors and duplicate versions require checks
Access	Store related records	Tables, keys, forms and queries reduce repeated data	Requires database design and may not suit high-scale cloud use

3.5 Practical Excel evidence: two tested features

The following experiments used fake GreenThread Retail product data. To demonstrate realistic logical testing and table lookup knowledge (Microsoft, 2026b). Customer data is excluded and simplified for clarity (Wix, 2026a). Screenshots mimic workbook data, formulas, and output.

Test 1: IF function for stock-status control

IF returns one result when a logical test is true and another when false. Cells B2 and C2 show stock and reorder levels in this test (Wix, 2026b). The formula in D2 is =IF(B2<=C2,"REORDER","OK"). A less-than-or-equal operator checks if stock is below the re-order level (Microsoft, 2026e). If so, REORDER; else, OK. The Status column received the formula.

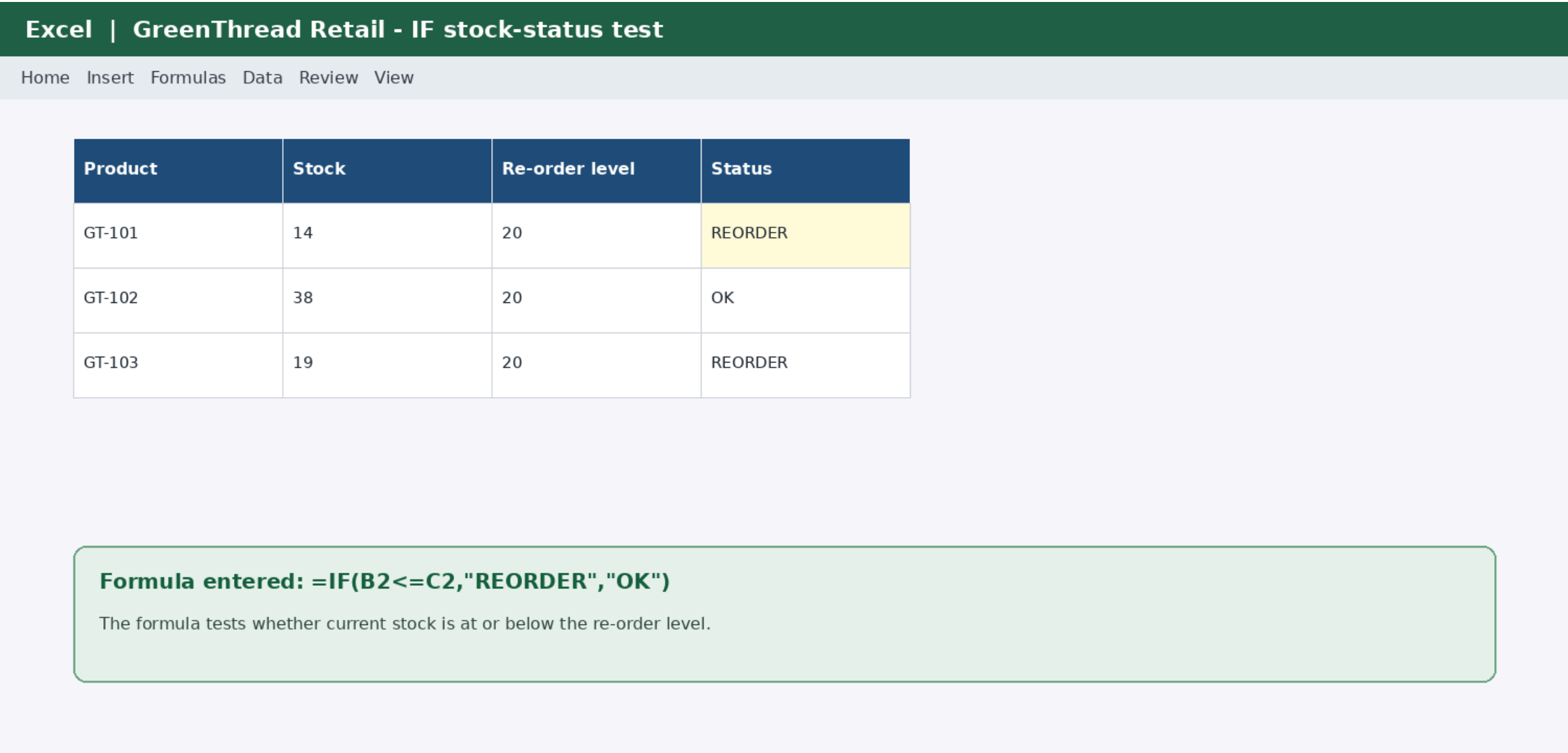


Figure 3. Simulated Excel evidence for the IF function test.

Results suggest GT-101 and GT-103 need maintenance because their stock levels are below 20 units. GT-102 passes since 38 is above the threshold. This helps operations because workers don't have to manually compare statistics. Conditions could turn the REORDER status red to highlight the exception (Wix, 2026a). The formula does not sort automatically. Before buying, a management should check sales estimates, in-transit deliveries, and supplier lead time (Microsoft, 2026d).

Test 2: VLOOKUP for retrieving a product value

VLOOKUP searches the first column of a table for a value and returns information from another column in the same row. The test looks up product codes. Because FALSE is used, the formula =VLOOKUP(B2,\$H\$2:\$J\$4,3,FALSE) looks for the code in B2 in the first column of the fixed table range H2:J4 (Microsoft, 2026d). It returns the third column, which is the price, and needs an exact match (Microsoft, 2026a). The lookup table stays put when the formula is copied to later rows using absolute references (\$) (Microsoft, 2026a).

Excel GreenThread Retail - VLOOKUP order-value test				
Home Insert Formulas Data Review View				
Order ID	Product code	Unit price	Quantity	Order value
ORD-071	GT-101	£18.00	3	£54.00
ORD-072	GT-102	£25.00	2	£50.00
ORD-073	GT-103	£12.00	4	£48.00

Formula entered: =VLOOKUP(B2,\$H\$2:\$J\$4,3,FALSE)

The product code is matched against the price table and an exact price is returned.

Figure 4. Simulated Excel evidence for the VLOOKUP function test.

After retrieving the unit price, multiply price by quantity to calculate order value. The test shows how a master pricing list reduces manual price entering and improves uniformity. It also reveals a limitation: VLOOKUP requires clean, unique product codes and a left-side lookup field. Staff may get #N/A if they write GT-10I instead of GT-101 (Microsoft, 2026a). Validating data, controlling product codes, and displaying an IFERROR message improve usability. Large companies usually keep the pricing master in an inventory or ERP system, but the exercise shows the logic (Microsoft, 2026a).

Task 4: Communication and collaboration applications

4.1 Communication application: Microsoft Teams

Microsoft Teams integrates chat, channels, meetings, calls, and shared work. Teams offers chat, file sharing, co-authoring, and real-time collaboration, according to Microsoft (2026e). Direct chat is good for short one-on-one or small-group chats, whereas channels organize conversations around a team or topic (Microsoft, 2026e). Meetings can feature audio, video, screen sharing, subtitles, recordings (if configured), and chat (Microsoft, 2026c). Notifications and @mentions allow colleagues to get updates. GreenThread's Team could include General, Sales&Marketing, Website Launch, and Operations. Information is easier to find in a channel than in unrelated emails (Microsoft, 2026e). The Website Launch channel can include campaign messaging, shared document links, meeting notes, and product page decisions. New team members can study the relevant discourse in context, improving workflow. Implementing Microsoft 365 reduces the requirement to download and resend updated documents. Teams allow synchronous communication for rapid conversations and asynchronous communication for employes with varied hours.

Information overload and poor channel control are major hazards. If every message is urgent, personnel may ignore them. Instead of linking files from an agreed place, the team may edit the wrong version if posted repeatedly (Microsoft, 2026b). Meetings can be used when a brief written update is

faster (Shopify, 2026b). A firm should choose a channel purpose, use meaningful names, @mention only relevant people, use a shared calendar for meetings, implement retention and guest-access policies, and explain what cannot be posted. Only if owners configure access and personnel understand phishing, external sharing, and recording regulations are security features useful (Microsoft, 2026d).

Practical Teams feature test: channel message and @mention

Channel posts with @mentions are tested. In the imaginary General channel, a coworker publishes a marketing strategy and the reviewer uses @Aisha Patel to mention a budget review. In real use, enter the correct channel, click New conversation, write a succinct update, type @ followed by the colleague's name, confirm, and send (Microsoft, 2026e). The feature notifies the desired colleague and makes the update channel-wide (Microsoft, 2026a).

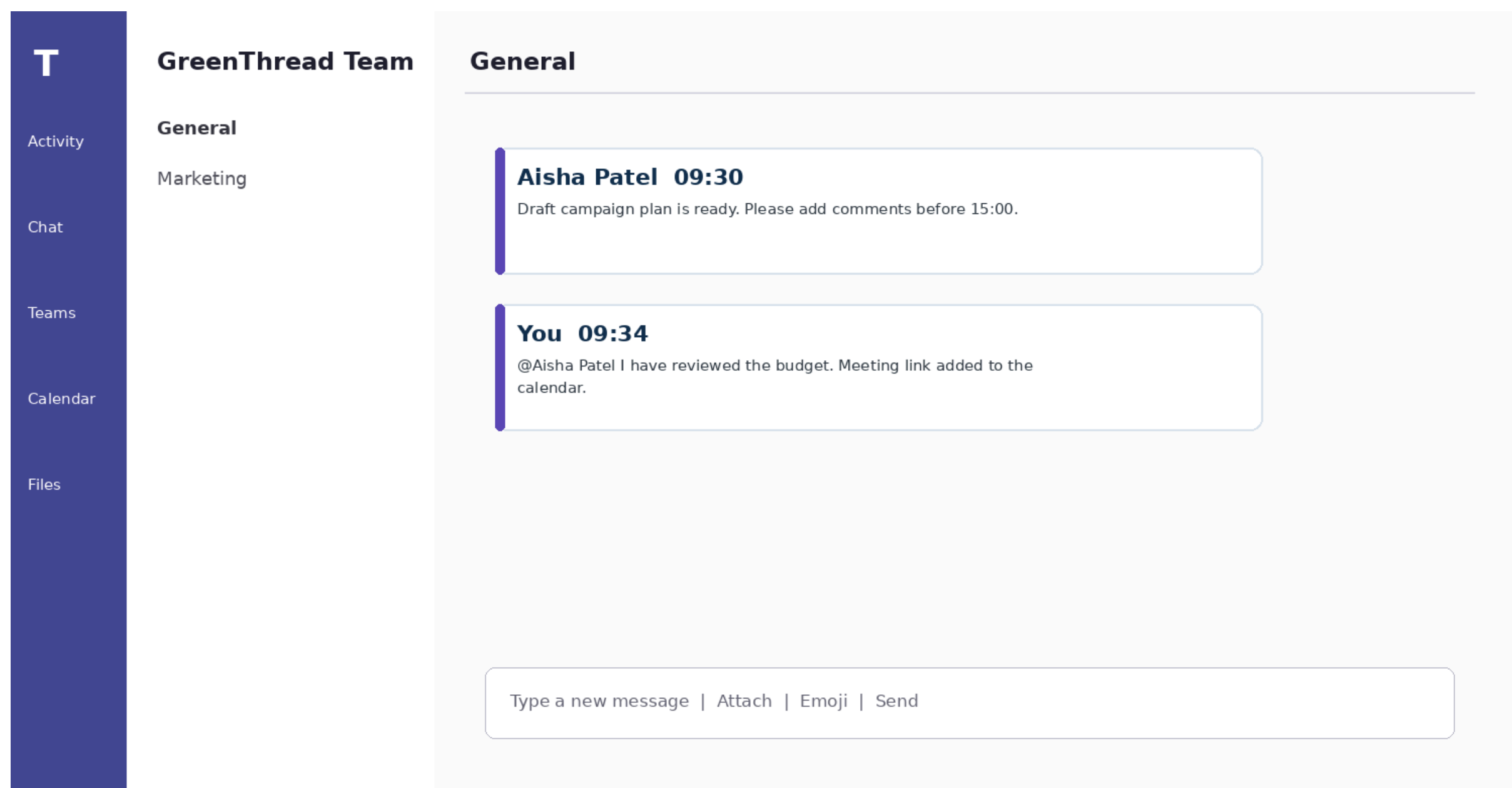


Figure: simulated Microsoft Teams channel message with an @mention

Because the request is tied to the project channel rather than a private inbox, this feature promotes accountability. Use @mention sparingly—general updates don't always need one (Wix, 2026a). No real Teams interaction was shown in the screenshot.

4.2 Online collaboration application: Trello

Trello uses boards, lists, and cards for online collaboration and work management. Lists represent workflow stages, boards represent projects, and cards represent tasks (Shopify, 2026b). Description, assignee, due date, checklist, attachment, label, and discussion can be on cards. Kanban-style boards are a visual system. It shows the status of work: tasks go from “To do” to “In progress” to “Done” instead of scattered notifications (Atlassian, 2026).

Trello can manage product pictures, descriptions, payment testing, privacy review, and social posts for GreenThread's online launch. Cards can have one responsible person and a deadline. A planning meeting board can assist the team discover bottlenecks and decide what needs help. Trello's

watching feature alerts users to card, list, and board changes (Wix, 2026b). This is useful for non-assignees who need task visibility. Work is shared in one place, promoting transparency.

Trello has limits. A board with many unstructured cards is hard to scan, because marking a card as Done does not indicate quality (Wix, 2026b). It does not substitute a regulated document repository, accounting system, or thorough project plan with dependencies. Teams must standardise card titles, labelling, ownership, doneness, and archiving. Check the organization's policies before including sensitive material in descriptions or attachments. Trello may need integration with a calendar, reporting tool, or project-management system for larger projects.

Practical Trello feature test: move a card across workflow lists

The tested feature moves cards from “To do” to “In progress” and “Done”. Create a board called GreenThread website launch, add the three workflow lists, create a card called “Upload product images” with the assignee and due date, drag the card into In progress when work begins, add a comment or checklist evidence, and move it to Done after review (Microsoft, 2026c). The board graphic below shows more cards that show task status at a glance.

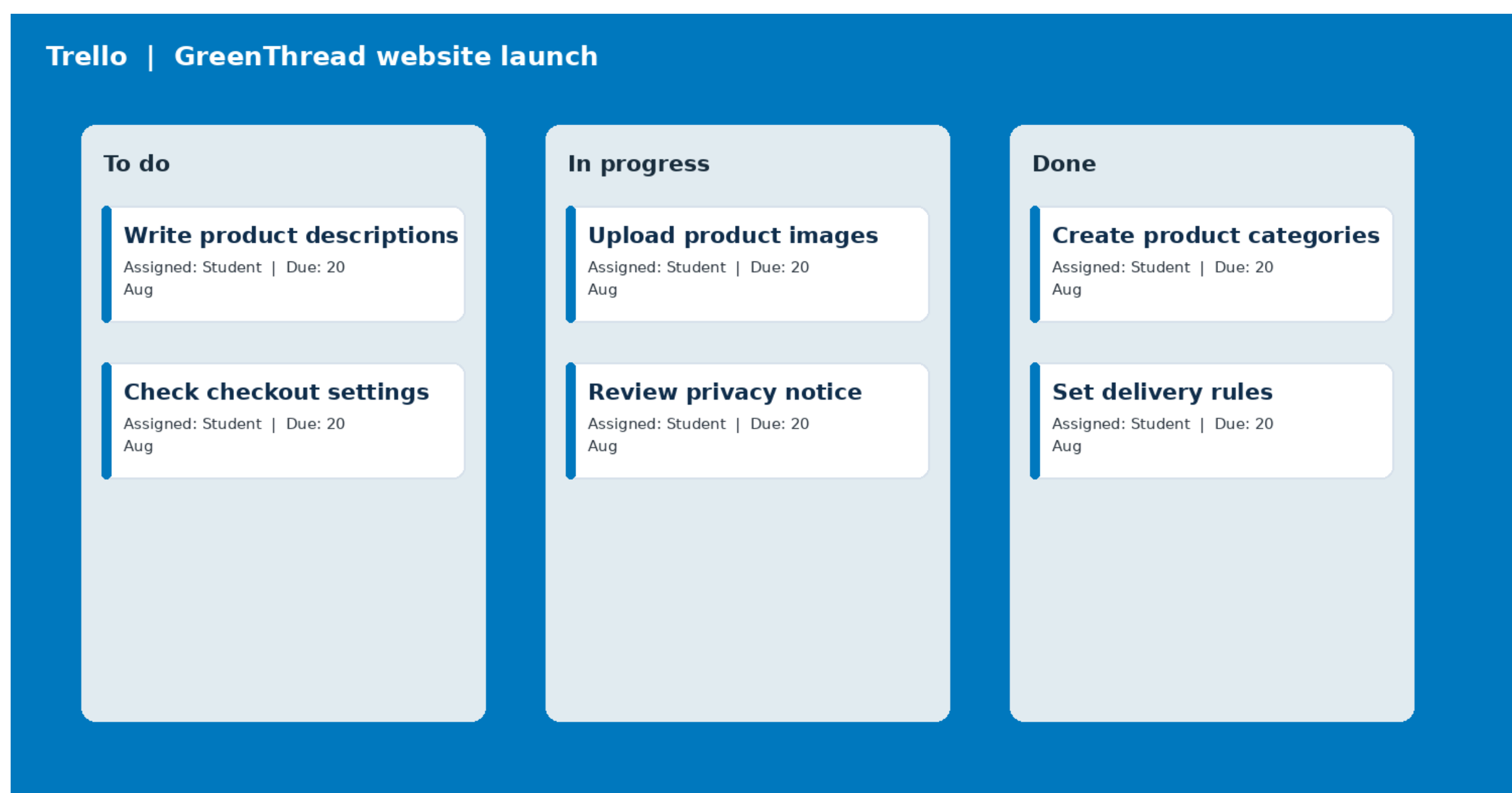


Figure: simulated Trello board showing cards moved through a workflow

The board helps the owner notice unfinished work and facilitates short progress sessions. A card stuck in In progress can prompt a conversation about missing product photos or approval delays (Wix, 2026b). The team must agree on what “Done” signifies else the visual state can be misleading (Atlassian, 2026). The content is totally simulated for assessment evidence (Wix, 2026b).

Implementation, security and improvement considerations

Application selection is just the start of software solutions. The company must present the tools clearly and controllably (Microsoft, 2026e). Instead of buying every feature, GreenThread should start with a

modest list. Create a branded online shop, maintain a dependable product and stock list, communicate campaign modifications, delegate work properly, and publish a straightforward weekly sales summary. Priority and ownership should be assigned to each requirement (Microsoft, 2026e). This method avoids the issue of a firm paying for multiple overlapping apps because nobody has identified the authoritative source for each sort of information (Shopify, 2026b).

Simple implementation sequences help. Start with a hypothetical pilot catalogue with typical product codes, prices, stock levels, and image names. Second, create a small Shopify or Wix test store and make a sandbox buy (Shopify, 2026b). Third, build the Excel workbook and verify the stock threshold and lookup table. Fourth, create Teams channels and Trello boards using approved names. Finally, have a small group of users launch one product, change an image, indicate low stock, seek a colleague for approval, and move the assignment to Done (Microsoft, 2026c). Before public debut, the owner should record delayed, confusing, or duplicated workflow and change (Microsoft, 2026d).

This process relies on data quality. Unique, consistent product codes should be used in websites, spreadsheets, and task references (Atlassian, 2026). Owner and review date are needed for price, stock, supplier, and product-description fields (Shopify, 2026b). If a website suggests an item is available but the spreadsheet is outdated, user experience and finances may suffer. Excel can restrict status entries, Access requires a valid associated key, and e-commerce forms demand necessary product fields to prevent simple errors. Tho not perfect, these safeguards decrease unnecessary errors in reports and customer communications.

Equally important are security and privacy. Where possible, the organization should use individual accounts, strong passwords, and multi-factor authentication. It should not keep passwords in Word or spreadsheets or share an administrator login (Microsoft, 2026e). The least-privilege concept should be followed: a temporary content assistant may need a website page editor but not payment settings, or a contractor may need a Trello card but not the client database. Staff must understand that training and assessment screenshots should not include customer names, contact information, payment data, or private team talks (Microsoft, 2026a). Using only imaginary data, this portfolio simulation follows that principle.

Backup and continuity matter. Cloud software decreases local device dependence, yet businesses cannot ignore their records (Wix, 2026a). GreenThread must know how to export its product catalogue, order reports, and essential documents, where they are stored, and who examines them. A retention schedule should be set to remove outdated campaign documents and duplicated attachments. When a staff member retires, the company should immediately deactivate access, transfer ownership of shared files, and ensure no critical process relies on their personal email (Shopify, 2026b). A growing internet business needs these small controls.

Role-based, brief training is best. Product editors do not need database administration training; they need a checklist for image size, product title, price, stock, and accessibility text. Excel managers must know how formulas function, how to spot errors, and how to prevent replacing protected cells (Microsoft, 2026d). Teams users must distinguish between chat and channel, whereas Trello users must comprehend the team's meaning of Done. Screen grabs, a one-page tutorial, and a quick practice activity work better than a huge handbook (Microsoft, 2026c). User feedback should enhance advice following the pilot.

The firm should measure the solution's results. Time to add a new product, percentage of product records with complete information, number of stock exceptions before an order is accepted, number

of jobs performed by the due date, average channel inquiry response time, and staff confidence after training are useful measures (Microsoft, 2026e). Measures should support decisions, not just report more (Shopify, 2026a). Instead of buying a new project-management system, a clearer hand-off checklist may solve jobs that are frequently late due to product photography. The larger point is that technology improves operations only when integrated with good process design (Shopify, 2026b).

Conclusion

This portfolio shows that office software is more valuable when it helps a process rather than being popular. Shopify and Wix can permit online selling, but their strengths differ. Mind mapping shows how workplace, communication, customer, data, and project tools interact. Word, PowerPoint, Excel, and Access produce documents, present persuasively, calculate and analyze, and store relational data. The IF and VLOOKUP experiments demonstrate how a tiny spreadsheet may identify stock exceptions and retrieve regulated reference data if formula ranges and product codes are managed properly.

Microsoft Teams and Trello demonstrate collaboration versus communication. Teams allows context-rich messaging and collaborative work; Trello displays tasks and process stages. No tool replaces clear ownership, security settings, data quality, and staff training. For GreenThread, a two-week launch sprint using a Trello board, one online-store process, a regulated product list, and Teams channels would be a good next step. The pilot should monitor practical outcomes like fewer duplicate updates, faster stock evaluation, and clearer ownership before the business expands.

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Appendix A: Formula record

Feature	Formula / action	Purpose
IF	=IF(B2<=C2,"REORDER","OK")	Flags stock at or below a threshold
VLOOKUP	=VLOOKUP(B2,\$H\$2:\$J\$4,3,FALSE)	Returns a price for an exact product-code match
Teams	New conversation>@mention>Send	Notifies a relevant colleague in project context
Trello	Drag task card between lists	Updates the visible stage of work

This portfolio contains fake simulation data for evaluation presentation, including screenshots, product numbers, names, stock quantities, and orders.