

FLEXCARE FACT

VMware Care is now an offering in FlexCare. It is important to keep your VMware environment updated and with this offering we will do just that 2 times per year. If you need more information on how VMware Care works, please see your Account Rep.



Empowering Smarter Decisions, How Power BI Fuels Business

Success

Brandi Johnson, Lift Pro Equipment

Kris Overby, FM Forklift

Andy Carr, Razor Consulting

Melissa Reeves, Razor Consulting

Hosted By: Brad Gorder, Network Center

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Why Build Custom Reporting?



Lift Pro
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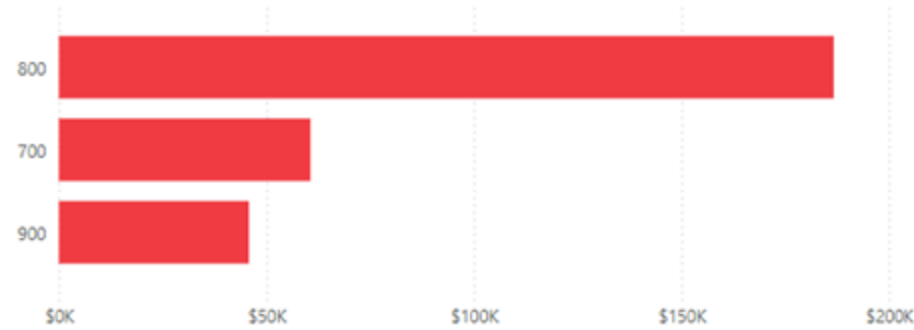
Getting Started with BI



Customer
All

Technician
All

Billable Amount and # WOs by Branch



Open Work Orders
410

Billable WIP
\$293.08K

Days Since Last Worked



Branch/Tech/WO	Days Open	Billable WIP	Opened	Equip #	Mfg	Model	Serial #	Customer Name	Status
700									
ANTHONY									
7001242	518	\$429.00	5/30/2023	86079	HEL	CPYD25-KU1H	230252N1430		TM-DELIVERED
7001672	383	\$4,068.42	10/12/2023		GEN	GR-15	GR15-36631		TM-DELIVERED
7001683	376	\$393.25	10/19/2023	86511	HEL	CBD20J-LI-S	08020JM8073		TM-DELIVERED
7002395	152	\$1,213.27	5/30/2024	86242	T	50-8FGCU25	508FGCU25-12903		3W Warranty
7002403	148	\$264.25	6/3/2024		KOM	FG25T-12	510306A		TM-DELIVERED
7002490	123	\$377.50	6/28/2024	86791	HEL	CBD20J-LI3	08020JO1940		3P PO Needed

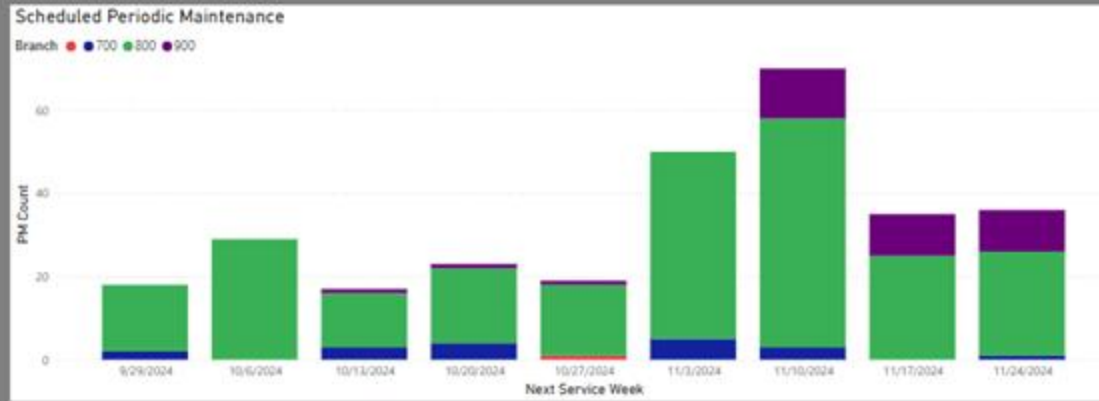


Adding Complexity



Equipment Num... All
 MFG Code All
 Technician All
 Service Zone & City All
 Sales Territory & City All
 Physical Branch
 700
 800
 900

297
PM's



Next Service Date

Select all

- January 2022
- April 2022
- August 2022
- October 2022
- December 2022
- January 2023
- February 2023
- March 2023
- April 2023
- May 2023
- June 2023
- July 2023

Periodic Maintenance List

Open WO	Open WO #	WO Type	Phys Branch	Zone	Customer #	City/State	Mfg	Model	Serial Number	Equip ID	PM Code	Last WO	WO Br	Last Date	Next Date	Last Meter	Next Meter
N			700	SOUTH	802467 000	VERMILLION, SD	T	8FG35U	8FG40U-13869	85079	PM2	7002169	700	4/4/2024	10/1/2024	887	1967
N			800	EAST	803641 000	SIOUX CENTER, IA	T	8FBCU30	8FBCU32-78161	87067	PM4	8018829	800	7/3/2024	10/1/2024	150	690
N			800	EAST	803641 000	SIOUX CENTER, IA	T	8FBCU30	8FBCU32-78643	87204	PM4	8018830	800	7/3/2024	10/1/2024	114	654
N			800	NORTH	800943 000	WATERTOWN, SD	CAT	P5000-LP	AT3512813	FL-2	PM1	8012590	800	9/19/2023	10/1/2024	3685	4765
N			800	NORTH	800943 000	WATERTOWN, SD	JLG	260-MRT	C200106729		PM1	PM13963	800	4/14/2021	10/1/2024	3837	4917
N			800	NORTH	800943 000	WATERTOWN, SD	KOM	FG25T-14	591567A		PM1	8012592	800	9/19/2023	10/1/2024	4518	5598
N			800	NORTH	803060 000	WATERTOWN, SD	MIT	FG25N	AF17D02462		PM4	8018890	800	7/3/2024	10/1/2024	9360	9900
N			800	NORTH	803487 000	MADISON, SD	CAT	GP18K	AT31A50575		PM1	8012867	800	10/2/2023	10/1/2024	5142	7332
N			800	NORTH	803573 001	ABERDEEN, SD	CLA	GTS30L	GTS23L-0177-9995 CNF		PM4	8018889	800	7/3/2024	10/1/2024	4043	4583
N			800	NORTH	803573 001	ABERDEEN, SD	T	8FGU25	8FGU25-93233	85180	PM4	8018899	800	7/3/2024	10/1/2024	2961	3501
N			800	WEST	804059 000	PIERRE, SD	T	8FGCSU20	8FGCSU20-17480		PM1	8012852	800	10/2/2023	10/1/2024	2621	4811
Y	8021201	Gen	800	NORTH	800943 000	WATERTOWN, SD	CAT	GP25	SAM91812		PM1	8012873	800	10/2/2023	10/1/2024	11714	12794
Y	8021284	Sch	800	SF	803119 005	SIOUX FALLS, SD	HEL	CPYD35-KU1H	230352N5342	86169	PM4	8018832	800	7/3/2024	10/1/2024	1810	1810
N			800	NORTH	801114 005	FORMAN, ND	JLG	G12-55A	0160066123		PM1	8012918	800	10/4/2023	10/3/2024	2550	4740
N			800	NORTH	801114 006	FORMAN, ND	YAL	GLP050VXNGSE	8875V14212699L		PM1	8012910	800	10/4/2023	10/3/2024	3879	6069
N			800	SF	801027 002	SIOUX FALLS, SD	T	8FB20U	8FB20U-17472	85265	PM3	8018272	800	6/6/2024	10/4/2024	2266	2986
N			700	SOUTH	812008 000	MARCUS, IA	MAN	TMT55HT	880536	85305	PM1	7001653	700	10/6/2023	10/5/2024	601	2791
Y	8021378	Sch	800	SF	810220 000	SIOUX FALLS, SD	T	8FDU32	8FDU32-C1822	85773	PM3	8017924	800	6/7/2024	10/5/2024	1454	1454
Y	8021285	Sch	800	SF	803119 005	SIOUX FALLS, SD	CAT	GP30N	AT13G00194		PM4	8018923	800	7/8/2024	10/6/2024	3708	4248



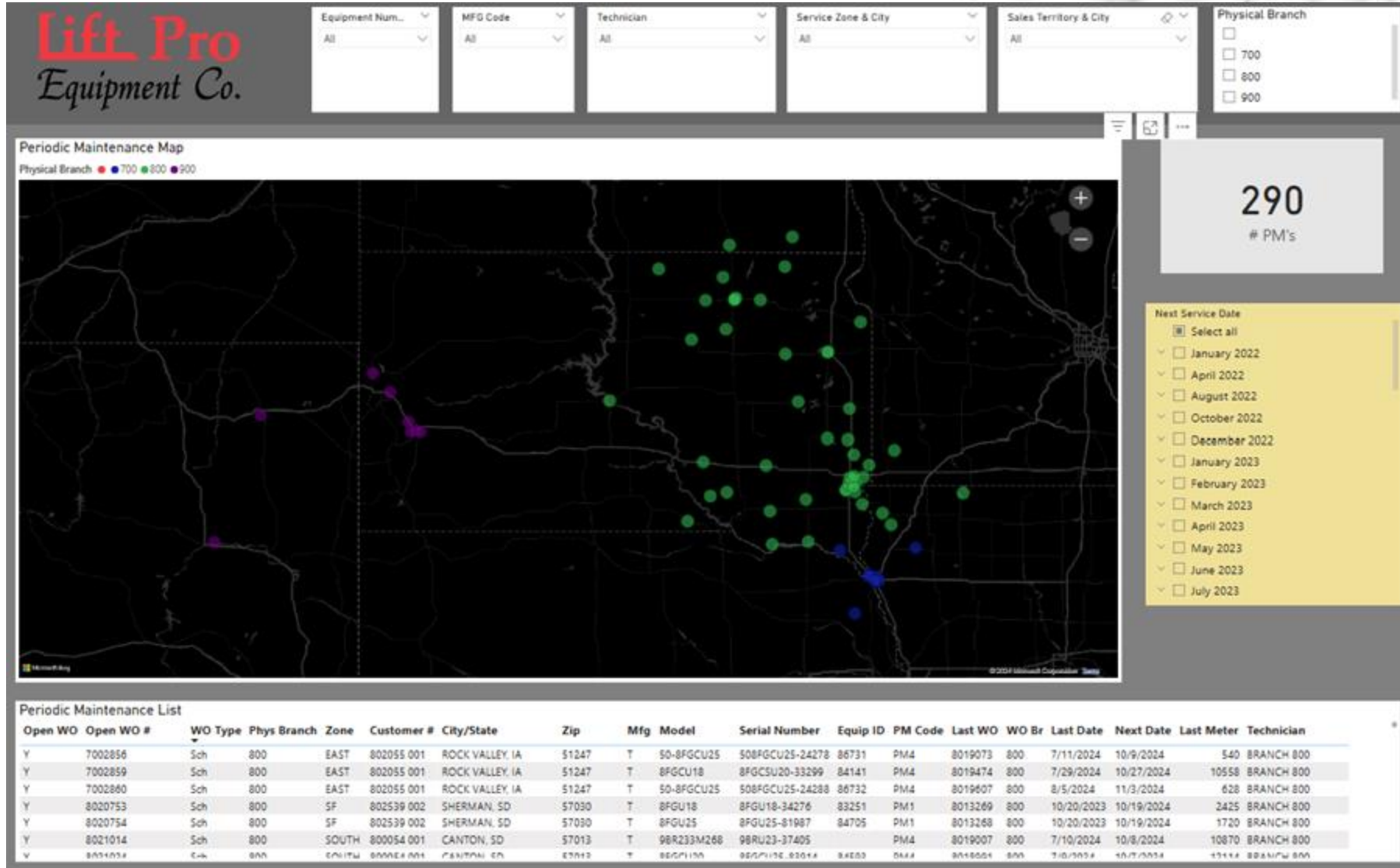
Merging Data Sources



The image displays a spreadsheet with five columns of data, each representing a different data source for zip codes and sales territories. The columns are color-coded: Column 1 (grey), Column 2 (green), Column 3 (green), Column 4 (orange), and Column 5 (yellow). Each column has a header row with 'Zip Code', 'City', 'County', 'ZONE', and 'SALESMAN'. The data rows are sorted alphabetically by zip code. The 'SALESMAN' column contains blacked-out text, likely representing redacted information.

Zip Code	City	County	ZONE	SALESMAN
27001	Aurora	North	South	
27002	Brookings	North	South	
27003	Brookings	North	South	
27004	Brookings	North	South	
27005	Brookings	North	South	
27006	Brookings	North	South	
27007	Brookings	North	South	
27008	Brookings	North	South	
27009	Brookings	North	South	
27010	Brookings	North	South	
27011	Brookings	North	South	
27012	Brookings	North	South	
27013	Brookings	North	South	
27014	Brookings	North	South	
27015	Brookings	North	South	
27016	Brookings	North	South	
27017	Brookings	North	South	
27018	Brookings	North	South	
27019	Brookings	North	South	
27020	Brookings	North	South	
27021	Brookings	North	South	
27022	Brookings	North	South	
27023	Brookings	North	South	
27024	Brookings	North	South	
27025	Brookings	North	South	
27026	Brookings	North	South	
27027	Brookings	North	South	
27028	Brookings	North	South	
27029	Brookings	North	South	
27030	Brookings	North	South	
27031	Brookings	North	South	
27032	Brookings	North	South	
27033	Brookings	North	South	
27034	Brookings	North	South	
27035	Brookings	North	South	
27036	Brookings	North	South	
27037	Brookings	North	South	
27038	Brookings	North	South	
27039	Brookings	North	South	
27040	Brookings	North	South	
27041	Brookings	North	South	
27042	Brookings	North	South	
27043	Brookings	North	South	
27044	Brookings	North	South	
27045	Brookings	North	South	
27046	Brookings	North	South	
27047	Brookings	North	South	
27048	Brookings	North	South	
27049	Brookings	North	South	
27050	Brookings	North	South	
27051	Brookings	North	South	
27052	Brookings	North	South	
27053	Brookings	North	South	
27054	Brookings	North	South	
27055	Brookings	North	South	
27056	Brookings	North	South	
27057	Brookings	North	South	
27058	Brookings	North	South	
27059	Brookings	North	South	
27060	Brookings	North	South	
27061	Brookings	North	South	
27062	Brookings	North	South	
27063	Brookings	North	South	
27064	Brookings	North	South	
27065	Brookings	North	South	
27066	Brookings	North	South	
27067	Brookings	North	South	
27068	Brookings	North	South	
27069	Brookings	North	South	
27070	Brookings	North	South	
27071	Brookings	North	South	
27072	Brookings	North	South	
27073	Brookings	North	South	
27074	Brookings	North	South	
27075	Brookings	North	South	
27076	Brookings	North	South	
27077	Brookings	North	South	
27078	Brookings	North	South	
27079	Brookings	North	South	
27080	Brookings	North	South	
27081	Brookings	North	South	
27082	Brookings	North	South	
27083	Brookings	North	South	
27084	Brookings	North	South	
27085	Brookings	North	South	
27086	Brookings	North	South	
27087	Brookings	North	South	
27088	Brookings	North	South	
27089	Brookings	North	South	
27090	Brookings	North	South	
27091	Brookings	North	South	
27092	Brookings	North	South	
27093	Brookings	North	South	
27094	Brookings	North	South	
27095	Brookings	North	South	
27096	Brookings	North	South	
27097	Brookings	North	South	
27098	Brookings	North	South	
27099	Brookings	North	South	
27100	Brookings	North	South	

Detailed Visuals



Power Platform: Power Automate

🗑️ Delete
📁 Archive
📧 Report
↩️ Reply
↩️ Reply all
➡️ Forward
🔍 Zoom
📖 Read / Unread
🏷️ Categorize
🚩 Flag / Unflag
🖨️ Print
⋮

Upcoming PM List



😊
↩️ Reply
↩️ Reply all
➡️ Forward
🔍
📄
⋮
Tue 10/1/2024 7:18 AM

Here is the list of upcoming PM's for next month and those that are past due:

Open WO	WO #	Branch	Customer #	Ship To Name	City/State	Mfg	Model	Serial Number	Equip ID	PM Code	WO Branch	Cust Phone	Last Date	Next Date	Last Meter	Next Meter
N		800	800011 000			MIT	MFC18	AF818-70042		PM1	800		2023-08-04	2024-08-03	9808	11998
N		800	813866 000			HYS	S50FT	H187V03624N		PM1	800		2023-08-31	2024-08-30	11530	13720
N		800	803749 000			T	8FGU25	8FGU25-67414	83989	PM1	800		2022-02-02	2023-02-02	1284	2364
N		800	803200 001			KES	K5000FLBSATQ	330		PM1	800		2023-04-28	2024-04-27	2815	5005
N		800	803200 001			T	8FG35U	8FG40U-13617	85100	PM2	800		2024-03-27	2024-09-23	2274	3354
N		800	813882 000			T	8HBW23	8HBW23-18866	P502	PM2	800		2023-10-26	2024-04-23	1082	2162
N		800	813882 000			T	8HBW23	8HBW23-37017		PM1	800		2023-10-12	2024-10-11	1107	3297
N		800	800513 000			T	68PU15	71452		PM1	800		2023-06-29	2024-06-28	25222	25222
N		800	800678 000			CAT	GP30	7AM00879		PM2	800		2023-12-20	2024-06-17	4909	5989
N		800	802424 001			T	7FGCU25	7FGCU25-01892		PM1	800		2022-09-23	2024-09-23	14050	16240
N		800	802424 001			T	7FGCU25	7FGCU25-97422		PM1	800		2022-07-26	2024-07-26	17522	19712
N		800	814018 000			CAT	P3500	AT3410399		PM1	800		2023-08-31	2024-08-30	6880	9070
N		800	803221 000			CAT	GP25	5AM91802		PM1	800		2022-11-14	2024-09-02	2072	4262

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Power Platform: Power Apps

Customer	Cust Num	Invoice Number	AR Total	Salesman	Invoice Date	Due Date	Days Old	AR Aging	Invoice Category	Paid Date	Outstanding Balance
	803891	8125801	\$209.76	HOUSE ACCT	9/6/2024	9/16/2024	49	46-60 Days	SO		\$209.76



Power Apps | Accounts Receivable Notes

Home Recent Pinned New Group Accounts Receivables

Save Save & Close + New Deactivate

Accounts Receivable

General Related

Customer [Redacted]

Invoice Number 8125801

Cust Num 803891

AR Total 209.76

Invoice Date 9/6/2024

Due Date 9/16/2024

Notes
Talked to customer on 10/1

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Thank You!

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