



Microsoft Dynamics GP **Technical Airlift 2013**

Advanced Excel Techniques: How to
be Your Customer's "Excel Hero"

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Agenda

- Case Study Review
- Dashboard in my Prius
- Build Dashboard in Excel
- Build Dashboard in Excel PowerPivot



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Case Study

Smith & Allen Consulting, Inc.
Microsoft Dynamics GP VAR

- Sales Order Processing for Invoicing
- Inventory Control for Time and Software
- Purchase Order Processing for Software orders



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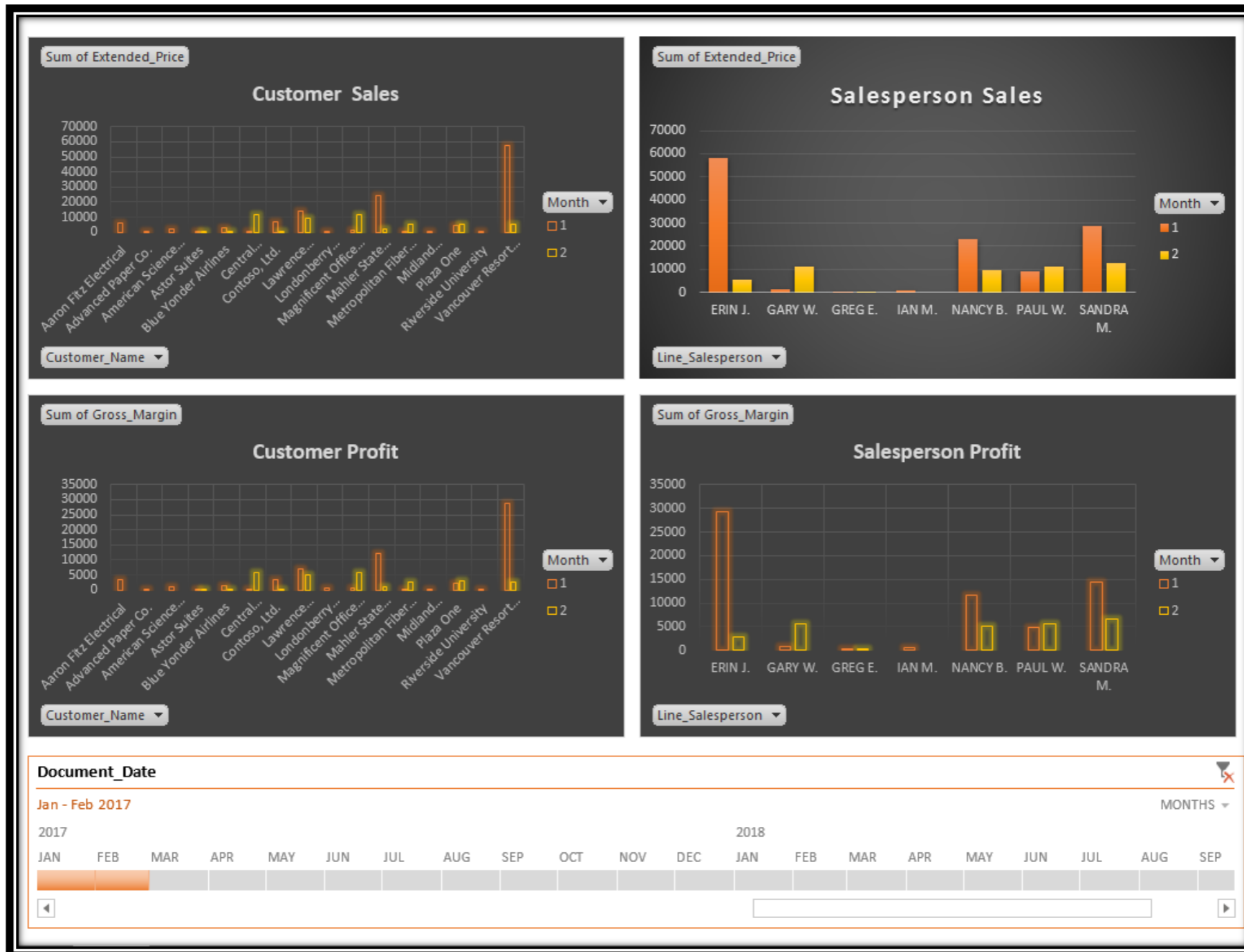
Case Study

What we want to see	Why we want to see it
Customer Momentum	“Things I wish I knew” – Being able to react Faster to a decline or increase in customer business.
Profit by Consultant	“Problem Area” – Monitoring how each consultant is producing compared to other consultants.
Profit by Client	“Things I wish I knew” – Do we have any clients on which we lose money? On who do we make the most profit?
Management Factor & Utilization Rate	“Goals” – Base measurement for consulting.
Amount billed per day per Customer per week	“Goals” – Continuity of Billing.

Dashboards in my Prius



Create PowerPivot





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Q&A

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