



Be a Southware Genius

SPA2020 Southware User Conference

Power BI

**Business
Intelligence for Your
SouthWare Data**

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- Power BI Review
- New Features
- Extract Utility

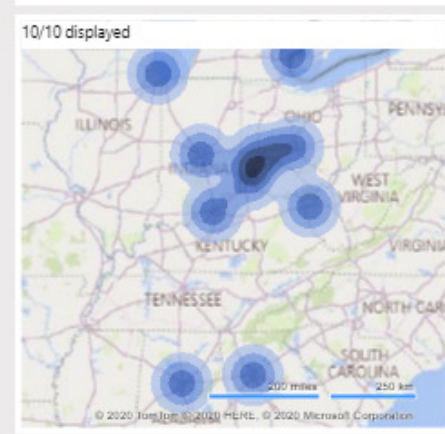
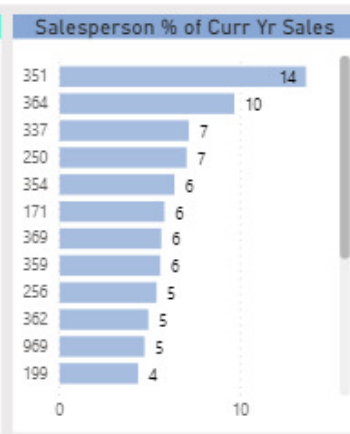
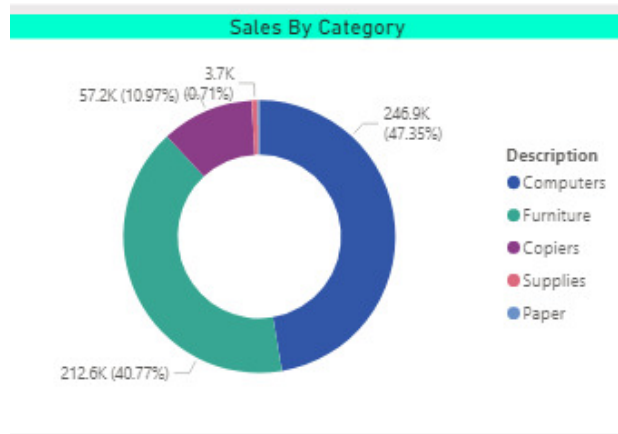
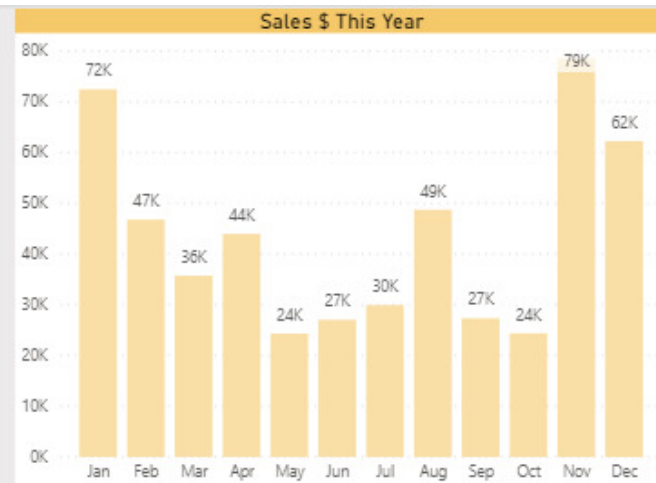
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Review

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SALES			
Year	Month-To-Date	Quarter-To-Date	Year-To-Date
2020	48,729	78,645	328,889
2019	56,884	104,355	446,750
2018	86,915	153,558	470,753
2017	93,622	132,099	384,413
2016	58,343	132,743	403,562
2015	70,655	114,737	422,107



Open Orders

80

Open Order Sales \$'s

340.40K

Open Order GP \$'s

87.82K

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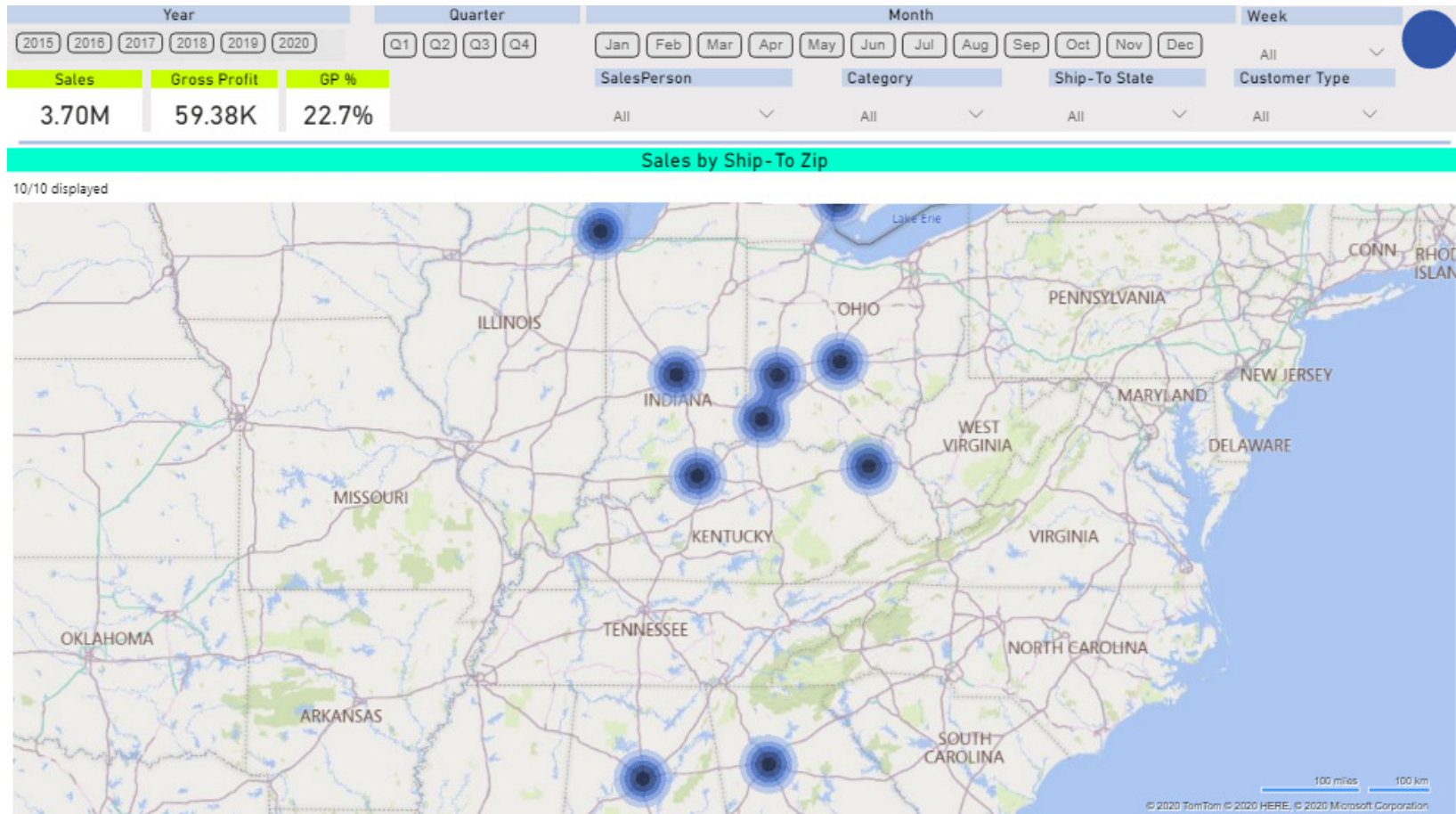
Year				Quarter				Month												Week		
2015	2018	2017	2018	2019	2020	Q1	Q2	Q3	Q4	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	All
Sales	Gross Profit	GP %	Territory	SalesPerson	Category	Cust State	Ship-To State	Location														
5.79M	3.35M	57.98	All	All	All	All	All	All														

SalesPerson Sales				Category Sales				Customer Sales Top 100			
SalesPersonName	TotalSales	TotalGrossProfit	UnitsSold	Code	TotalSales	TotalGrossProfit	UnitsSold	CustName	TotalSales	TotalGrossProfit	UnitsSold
House	3,882,943.91	2,269,370.17	330,488.10	SEQ	3,038,697.92	2,118,236.04	160,464.30	American Enterprises	401,631.69	284,178.57	49,488.00
Cliff Kohl	601,284.14	330,890.27	51,752.00	PXT	992,483.14	443,677.43	7,858.00	Shamrock Gifts	222,365.80	134,041.81	30,917.75
Rick Ranch	245,821.33	102,106.01	12,328.75	NEX	269,395.61	65,558.93	46.00	Jewel Osco	199,852.80	105,062.66	5,058.60
Kay Coleman	171,739.86	102,983.34	10,458.50	SUB	239,930.77	12,483.82	263.00	East Lake Properties	173,113.19	110,098.88	14,865.00
Justin Case	146,264.13	82,767.12	12,740.90	ORI	124,510.74	119,119.46	11,195.00	City of Congress	152,376.68	14,559.15	585.00
James Clown	109,688.44	72,680.95	20,641.00	SPR	122,784.84	26,729.64	415.00	American Amex	140,194.75	63,044.03	477.00
Becky Smoot	97,426.68	56,407.22	8,019.50	LAB	113,335.54	98,649.45	136,813.00	Fire Suppression Syste	129,572.00	73,335.58	7,703.30
George Throne	94,218.32	63,216.40	11,660.00	REX	110,242.96	82,811.23	1,259.00	Evans Landscaping	125,347.17	77,757.50	19,077.00
Eric Grate	84,619.62	52,826.53	3,919.30	TS	101,046.66	90,118.15	97,023.00	Schedule Storage	124,390.91	79,865.06	18,740.00
Brent Shishler	68,964.14	41,436.00	8,100.00	NSY	96,027.23	25,433.04	1,350.00	Allebra Solutions	108,658.62	70,388.28	12,304.75
Kim Slick	54,851.62	35,841.81	1,636.75	DET	50,555.91	24,706.41	563.00	Kennington University	101,258.03	50,133.08	2,337.80
William Sedona	48,656.33	26,852.34	1,103.75	PCM	45,120.68	37,001.16	26,965.00	Advanced Health Care	100,081.84	58,023.20	11,254.25
Sam Kennison	43,966.23	29,075.18	6,919.50	SBL	43,839.00	29,475.61	1,058.00	Elementary Watson and Sons	87,123.24	59,953.76	15,502.00
John Menke	41,034.77	29,287.25	7,978.00	NCA	42,673.00	4,366.27	188.00	Kesson Cleaners	85,474.10	53,836.25	3,967.50
Markus Stantan	26,191.82	17,339.89	2,268.00	SEN	38,147.95	12,272.17	3,214.00	Elm Street Coffee	77,864.44	48,839.28	4,708.00
Mark Madhouse	14,126.07	9,526.12	1,177.25	FAC	33,361.48	12,793.64	31.00	Monticella Companies	77,182.18	14,481.42	1,184.00
Total	5,785,221.26	3,354,557.29	494,854.30	SPE	30,364.03	14,194.14	1,231.00	Cat and Company	76,131.08	47,755.85	8,907.00

Location Sales			
Loc	TotalSales	TotalGrossProfit	UnitsSold
001	5,028,992.38	3,008,487.43	488,015.30
098	237,333.96	107,303.86	2,130.00
096	208,357.00	96,058.96	1,838.00
099	145,776.63	68,454.41	1,280.00
104	45,949.12	21,367.03	442.00
101	35,121.43	13,939.87	350.00
Total	5,785,221.26	3,354,557.29	494,854.30

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Year			Quarter				Month												Week			
2015	2016	2017	2018	2019	2020	Q1	Q2	Q3	Q4	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	All
Sales	Gross Profit	GP %	Territory	SalesPerson	Category	Bill-To State	Ship-To State	Location														
5.79M	3.35M	57.98	All	All	All	All	All	All														

Open Sales Orders

SalesPerson Open Orders				Category Open Orders				Customer Open Orders			
SalesPersonName	#OpenOrd	ExtendedPrice	QtyOrdered	Code	#OpenOrd	ExtendedPrice	QtyOrdered	CustName	#OpenOrd	ExtendedPrice	QtyOrdered
Cliff Kohl	8	9,857.86	681	SEQ	128	78,288.00	1835	American Enterprises	35	29,408.86	31
House	110	111,333.93	3453	NEX	1	23,278.20	4	American Amex	1	23,338.70	5
Kay Coleman	2	628.29	15	PXT	17	17,504.85	111	Illinois Solutions	3	7,721.59	385
Markus Stantan	5	4,104.04	406	PFH	1	2,276.12	14	Cat and Company	4	5,864.08	506
Rick Ranch	1	99.14	19	SFX	1	1,300.00	10	Kennington University	1	4,760.47	283
Steve Carinteen	1	368.06	4	NEM	1	1,248.00	26	Sports Supply	2	4,569.34	122
Unknown	2	3,507.45	414	TS	38	1,197.38	1067	Pacific Tacticle	2	4,530.20	47
Total	129	129,898.77	4992	ORI	13	660.00	58	East Lake Properties	3	4,455.00	5
				LAB	39	655.03	1207	Bradley Enterprises	2	4,198.19	611
				FHN	1	561.40	14	Jergens	3	3,773.00	3
				PCM	10	396.00	457	AJ Gastright	1	3,647.88	1
				SI	3	336.38	35	Consolidated Trucking	1	3,592.12	46
				REX	1	294.54	3	Weisman Memorial Hospital	1	3,382.50	1
				SBL	1	271.70	9	Shamrock Gifts	12	2,850.49	826
				PCA	7	247.73	10	Body Works	2	2,470.16	598
				PP	11	241.45	46	DSC Laminating	2	2,081.69	397
				LIN	3	214.90	21	Medallion Transmissions	1	2,072.85	147
				BAN	8	195.51	19	Sloaner Valve	1	1,596.65	5
				PS	1	152.46	1	Fire Suppression Ssytems	3	1,590.33	104
				PRT	2	131.22	12	The Polarny	3	1,526.20	185
				SPE	1	115.40	5	Midwest Insurance	3	1,311.57	96
				Total	129	129,898.77	4992	Total	129	129,898.77	4992

Location Open Orders			
LocationNo	#OpenOrd	ExtendedPrice	QtyOrdered
001	129	114,111.72	4849
104	1	6,545.00	50
096	5	5,941.76	38
098	4	1,439.90	11
099	1	1,209.74	34
105	2	341.00	4
Total	129	129,898.77	4992

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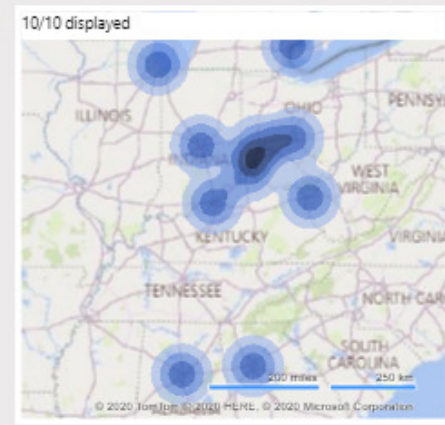
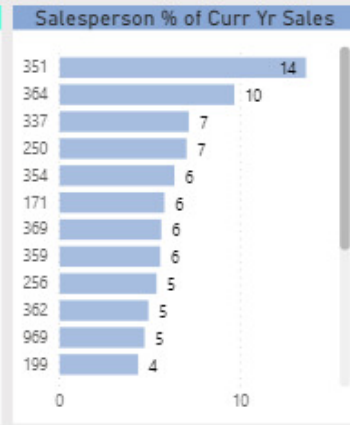
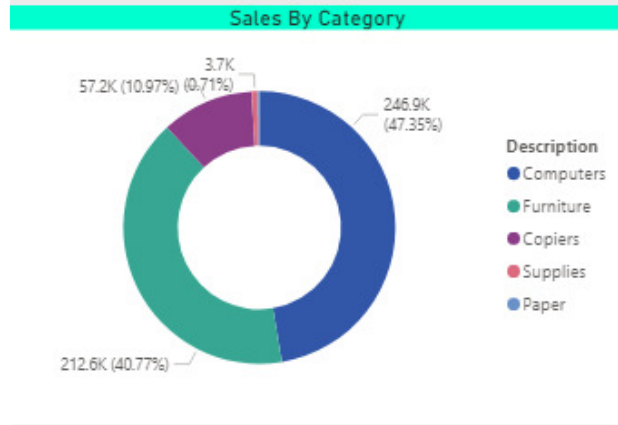
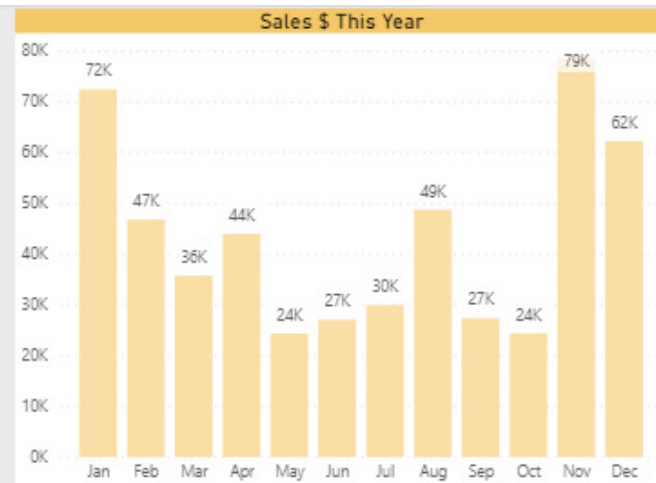
Sample Visuals

With New Features

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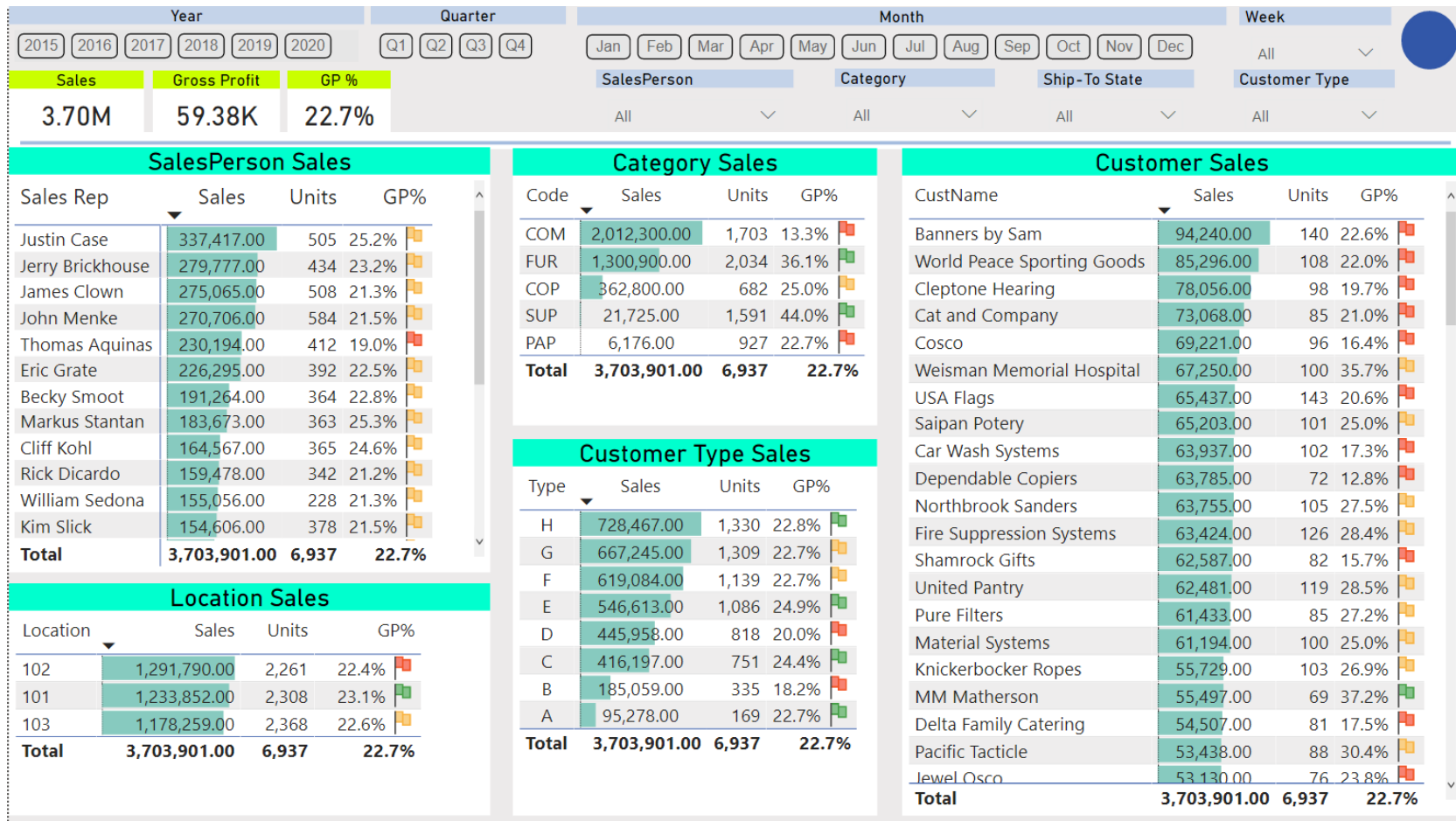
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Power BI - Sales Graphs



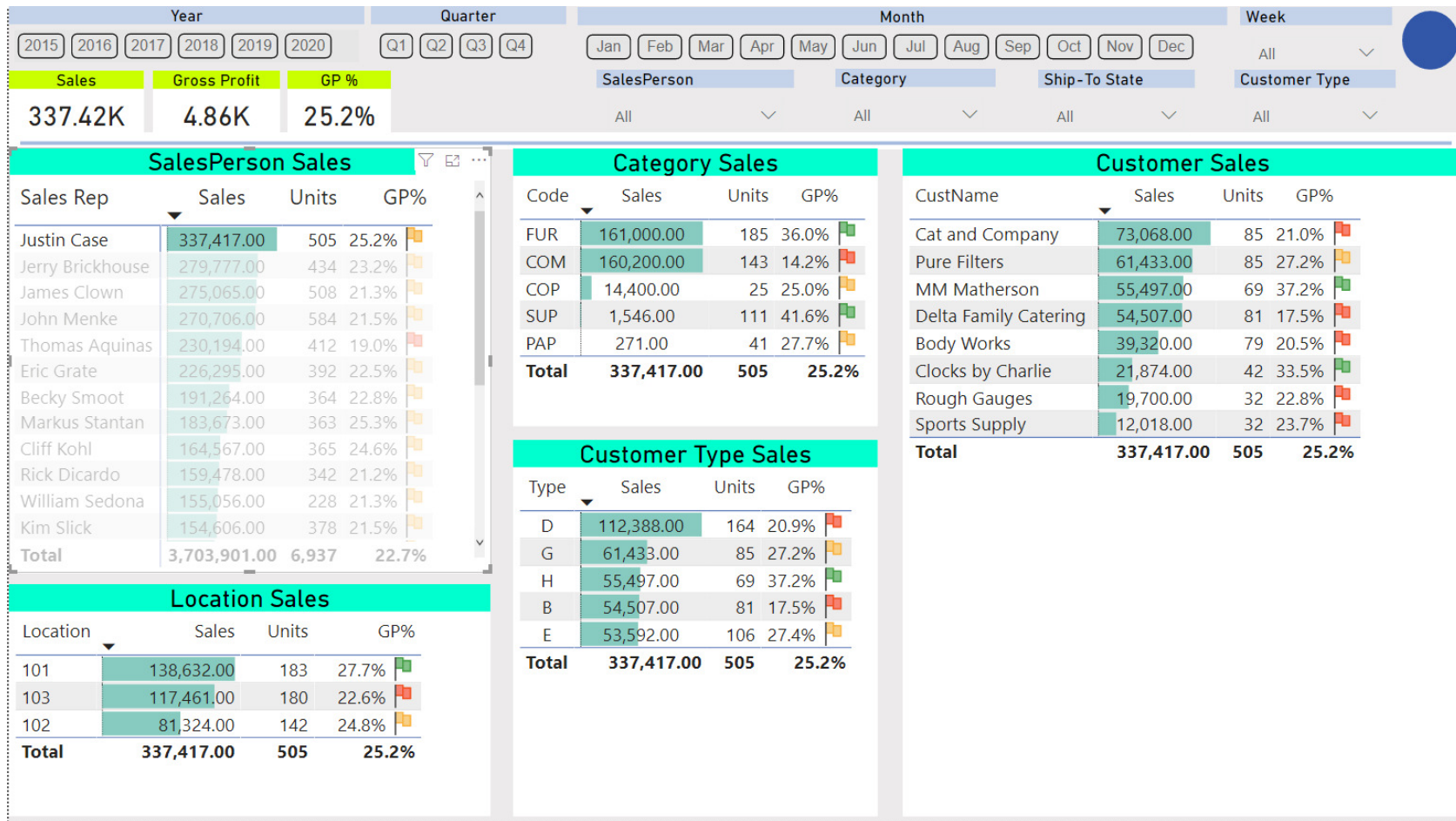
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Power BI - Sales Reports



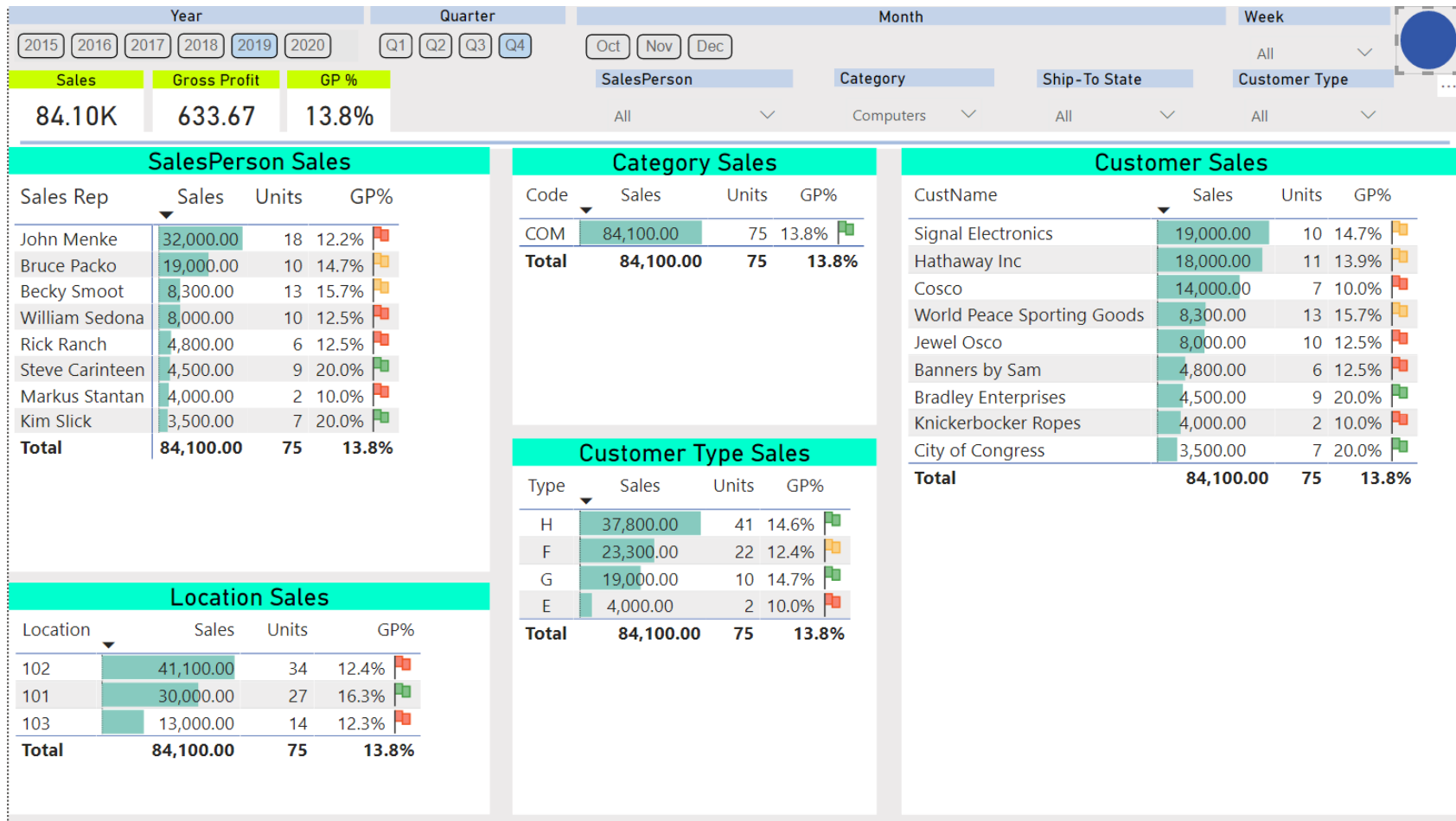
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Power BI - Sales Reports...Single Filter Example



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Power BI - Sales Reports...Top Multi-Filter Example



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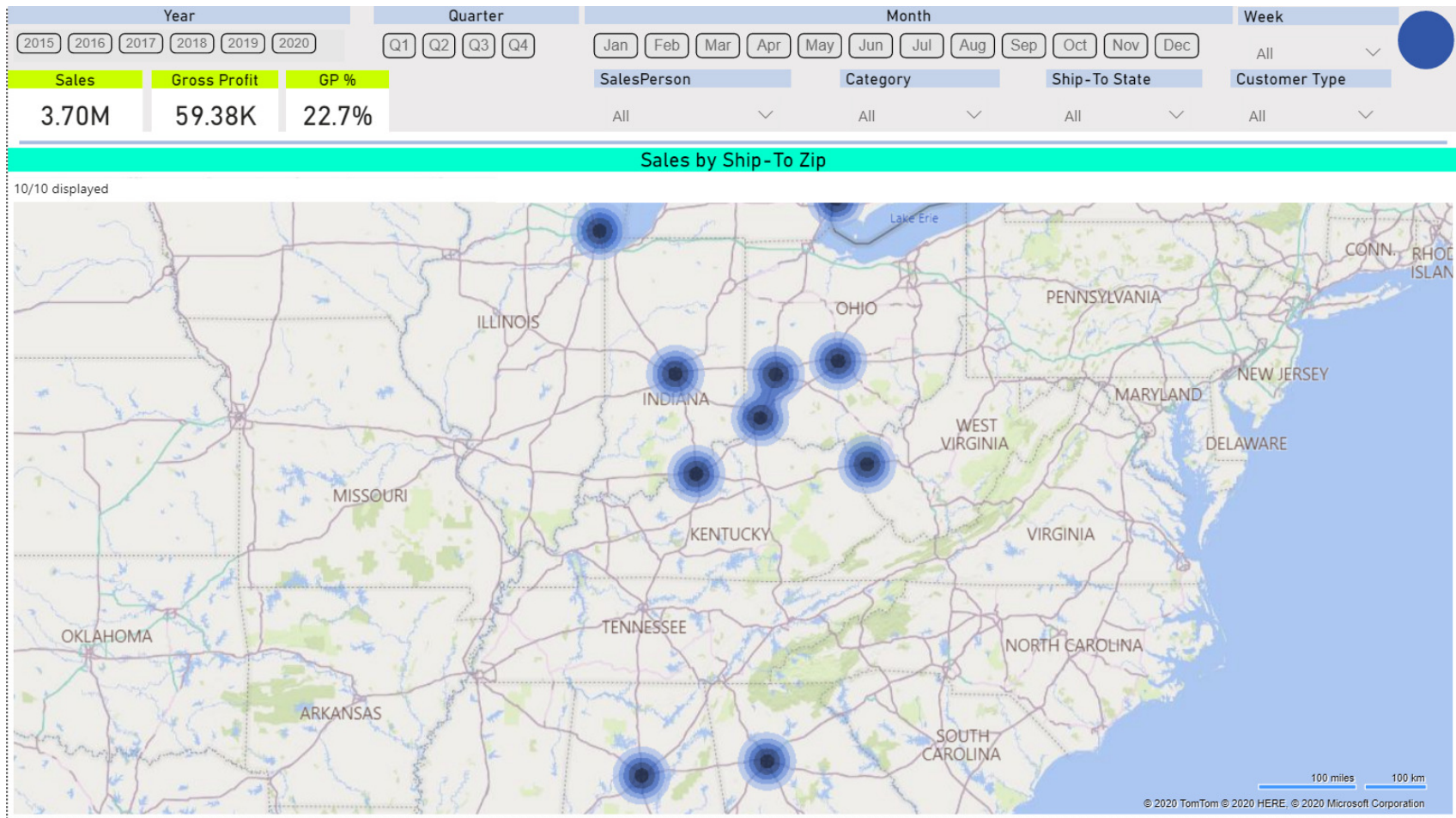
Power BI - Sales Reports Detail

Year			Quarter				Month												Week			
2015	2016	2017	2018	2019	2020	Q1	Q2	Q3	Q4	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	All
Sales	Gross Profit	GP %	SalesPerson			Category			Ship-To State			Customer Type										
3.70M	59.38K	22.7%	All			All			All			All										

Customers		Invoice Header					Invoice Detail						
CustNo	Customer Name	Invoiced	InvNo	CustName	Amount	Units	Invoiced	InvNo	StockNo	Qty	UOM	UnitPrice	Amount
ADVH02	Advanced Health Care	01/05/15	150101	Medallion Transmissions	2,600.00	4	01/05/15	150101	BUSH-26628-03K	2	EA	600.00	1,200.00
ADVT06	Advent Systems	01/05/15	150102	Northbrook Sanders	2,800.00	10	01/05/15	150101	HP-TP01-1036	2	EA	700.00	1,400.00
AHCA01	AHC Associates	01/12/15	150103	Rexion Filters	13,500.00	10	01/05/15	150102	SADIE-TASK-5	1	EA	100.00	100.00
AJGA01	AJ Gastright	01/12/15	150104	Elm Street Coffee	3,100.00	9	01/05/15	150102	ZL-SP6660-23	9	EA	300.00	2,700.00
ALEB04	Alex Brothers	01/19/15	150105	Letter and Packages	1,870.00	10	01/12/15	150103	AL-LFC-5	5	EA	1200.00	6,000.00
ALEB01	Allebra Solutions	01/19/15	150106	Weber Supply	6,316.00	11	01/12/15	150103	SAM-NP730XBEI	5	EA	1500.00	7,500.00
AMEA03	American Amex	01/26/15	150107	Cat and Company	10,518.00	10	01/12/15	150104	LZB-44762	7	EA	300.00	2,100.00
AME02	American Enterprises	01/26/15	150108	USA Flags	5,100.00	14	01/12/15	150104	MSI-M046	2	EA	500.00	1,000.00
AVOP01	Avon Products	02/02/15	150109	Alex Brothers	6,400.00	10	01/19/15	150105	BUSH-26628-03K	3	EA	600.00	1,800.00
BANS01	Banners by Sam	02/02/15	150110	East Lake Properties	5,200.00	7	01/19/15	150105	MC-8	7	EA	10.00	70.00
BODY01	Body Works	02/09/15	150111	Evan Landscaping	3,654.00	18	01/19/15	150106	HP-MP	2	EA	8.00	16.00
BRAE03	Bradley Enterprises	02/09/15	150112	Sterling Coatings	3,000.00	6	01/19/15	150106	HP-TP01-1036	9	EA	700.00	6,300.00
BREA01	Breakford Inc	02/16/15	150113	Material Systems	3,045.00	11	01/26/15	150107	SAM-NP730XBEI	7	EA	1500.00	10,500.00
CARW07	Car Wash Systems	02/16/15	150114	Monticella Companies	2,445.00	12	01/26/15	150107	TR-MP	3	EA	6.00	18.00
CATC01	Cat and Company	02/23/15	150115	Cleptone Hearing	22,500.00	18	01/26/15	150108	HON-H5149Q	5	EA	300.00	1,500.00
CBRE02	Central Boxes	02/23/15	150116	Hathaway Inc	1,680.00	10	01/26/15	150108	OKI-62444801	9	EA	400.00	3,600.00
CHIW01	Chicago Worthington	03/02/15	150117	Schedule Storage	635.00	6	02/02/15	150109	AL-LFC-5	2	EA	1200.00	2,400.00
CICT01	City of Congress	03/02/15	150118	Evan Trucking	7,800.00	17	02/02/15	150109	MSI-M046	8	EA	500.00	4,000.00
CLEP01	Cleptone Hearing	03/09/15	150119	Oak Park Manufacturer	7,300.00	11	02/02/15	150110	BUSH-26628-03K	2	EA	600.00	1,200.00
CLOC03	Clocks by Charlie	03/09/15	150120	Cosco	19,200.00	12	02/02/15	150110	LNV-15IIL05	5	EA	800.00	4,000.00
COCC01	CocaCola	03/16/15	150121	MM Matherson	12,020.00	14	02/09/15	150111	OKI-62444801	9	EA	400.00	3,600.00
CONC05	Consolidated Trucking	03/16/15	150122	Quantitive Measures	198.00	12	02/09/15	150111	TR-MP	9	EA	6.00	54.00
CONT02	Contenders Sports	03/23/15	150123	Weber Supply	5,200.00	10	02/09/15	150112	DELL-7975	4	EA	600.00	2,400.00
COS18	Cosco	03/23/15	150124	American Enterprises	2,103.00	8	02/09/15	150112	ZL-SP6660-23	2	EA	300.00	600.00
		03/30/15	150125	Cat and Company	18,000.00	13	02/16/15	150113	HAM-CP	9	EA	5.00	45.00
		03/30/15	150126	International Boxes	6,500.00	11	02/16/15	150113	SAM-NP730XBEI	2	EA	1500.00	3,000.00
		04/06/15	150127	Schedule Storage	21,000.00	12	02/16/15	150114	EPSON-5800	3	EA	800.00	2,400.00
		Total			3,703,901.00	6,937	Total			6937	659211.00	3,703,901.00	

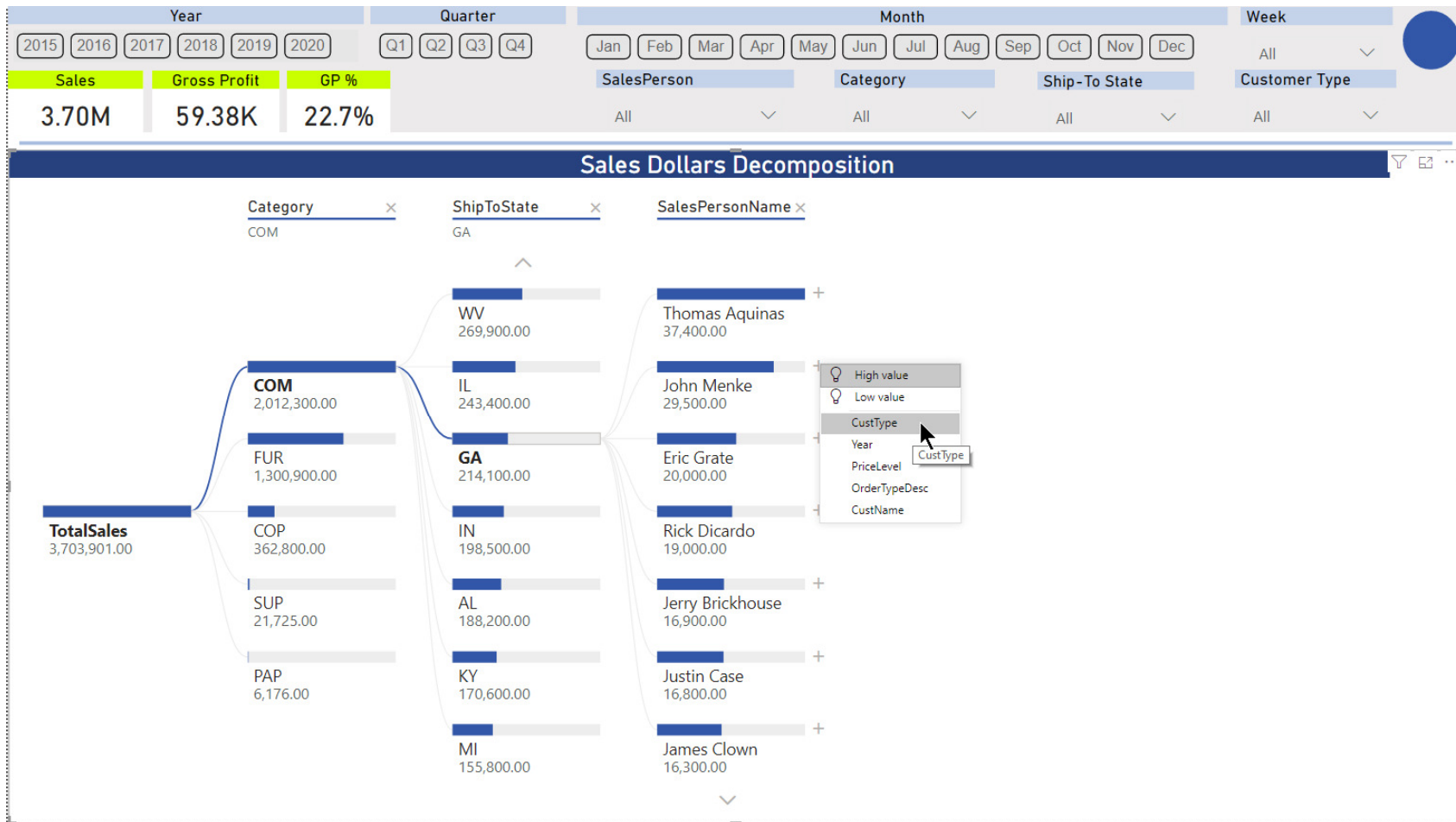
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Power BI - Sales by Ship-To Location



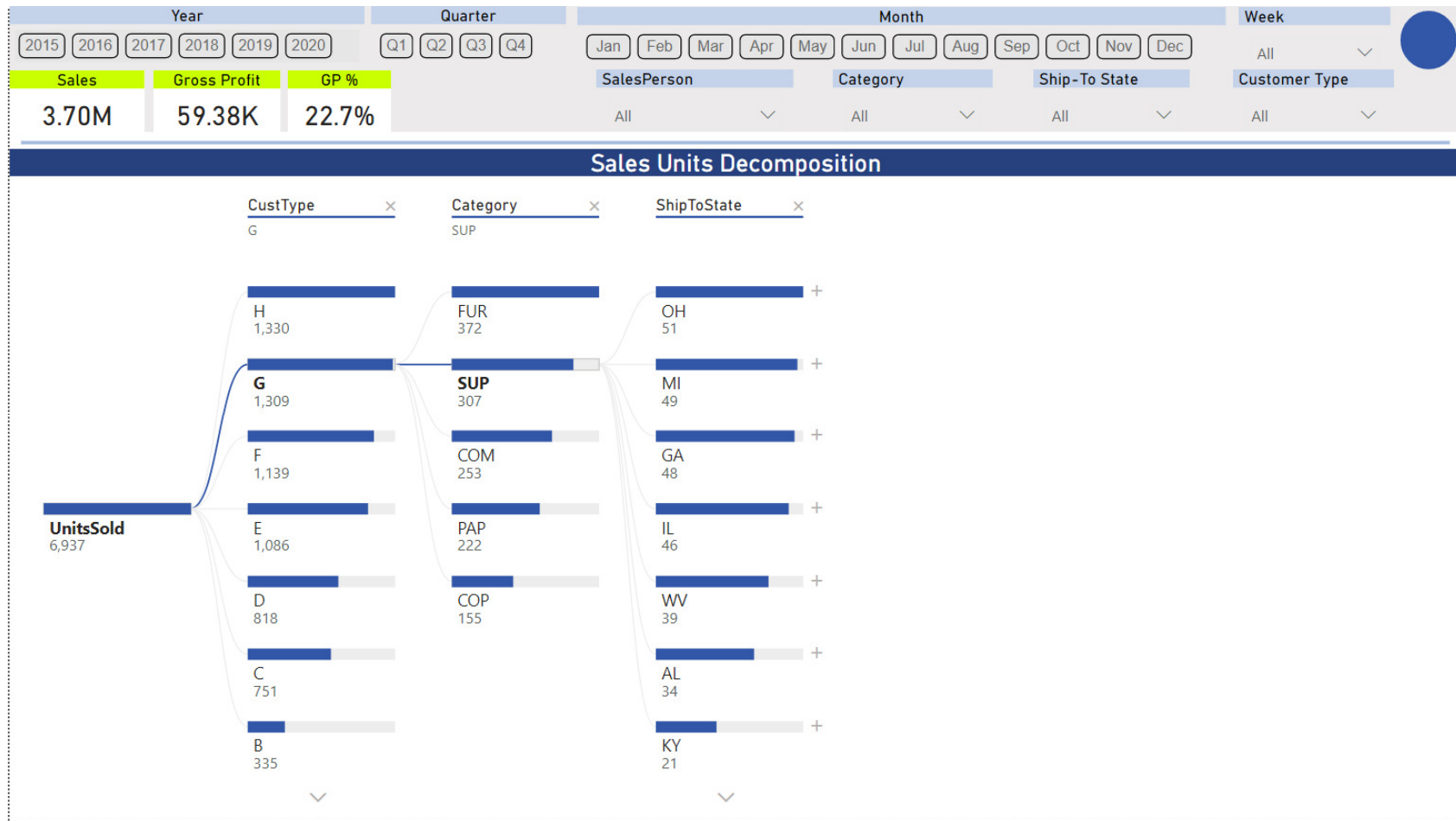
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Power BI – Dynamic Sales \$ Decomposition



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Power BI – Dynamic Sales Units Decomposition



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Power BI – Open Sales Orders Summary

Year			Quarter				Month												Week			
2015	2016	2017	2018	2019	2020	Q1	Q2	Q3	Q4	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	All
Sales	Gross Profit	GP %	SalesPerson			Category			Ship-To State			Customer Type										
3.70M	59.38K	22.7%	All			All			All			All										

Open Sales Orders

SalesPerson Open Orders				Category Open Orders				Customer Open Orders			
SalesPersonName	#Orders	Amount	Quantity	Category	#Orders	Amount	Quantity	Customer Name	#Orders	Amount	Quantity
Charles Thegaull	9	41,648.00	105	Computers	29	145,140.00	190	Medical Supplies	2	20,790.00	31
Thomas Aquinas	4	32,590.00	64	Furniture	38	123,140.00	250	Fire Suppression Systems	2	19,840.00	22
Steve Carinteen	7	31,050.00	55	Supplies	44	33,804.00	283	United Packaging	1	19,320.00	19
Markus Stantan	7	29,293.00	74	Copiers	14	26,160.00	83	Advanced Health Care	1	17,320.00	11
Brent Shishler	4	27,180.00	33	Total	80	340,404.00	902	Jewel Osco	1	17,320.00	14
House	3	21,560.00	34	Customer Type Open Orders				Weber Supply	2	15,040.00	18
Cliff Kohl	7	21,503.00	87	Type	#Orders	Amount	Quantity	Superior Nuts	2	13,190.00	32
Mark Madhouse	2	20,670.00	31	F	15	74,359.00	193	Body Works	4	12,983.00	29
Rick Dicardo	5	19,410.00	56	C	12	65,842.00	130	Kennington University	3	12,368.00	32
Sam Kennison	8	19,005.00	104	D	14	56,019.00	130	Sloaner Valve	1	12,120.00	19
John Menke	4	16,647.00	40	H	11	55,377.00	147	Five Star Services	2	11,800.00	33
Becky Smoot	5	14,924.00	52	Total	80	340,404.00	902	Norwood Munciple Properties	2	9,440.00	15
Justin Case	3	12,282.00	39	Location Open Orders				Dependable Copiers	1	9,320.00	11
Rick Ranch	5	11,054.00	54	Location	#Orders	Amount	Quantity	Ewing Davis and Woodford	1	9,320.00	5
Kay Coleman	2	10,658.00	21	102	42	124,609.00	244	Banners by Sam	2	8,640.00	26
Eric Grate	1	3,320.00	7	103	45	119,325.00	322	DSC Laminating	1	6,920.00	9
Bruce Packo	2	3,265.00	24	101	48	96,470.00	336	Evan Landscaping	1	6,920.00	10
William Sedona	1	2,920.00	11	Total	80	340,404.00	902	Letter and Packages	1	6,920.00	8
Kim Slick	1	1,425.00	11					Total	80	340,404.00	902
Total	80	340,404.00	902								

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Power BI – Open Orders Detail

Year			Quarter				Month												Week			
2015	2016	2017	2018	2019	2020	Q1	Q2	Q3	Q4	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	All
Sales	Gross Profit	GP %	SalesPerson			Category			Ship-To State			Customer Type										
3.70M	59.38K	22.7%	All			All			All			All										

Customers				Order Detail								
CustNo	Customer Name	City	State	Customer Name	OrderDate	Order#	Line	Item #	Ordered	UOM	UnitPrice	Amount
ADVH02	Advanced Health Care	Columbus	OH	United Packaging	08/01/20	300001	10	AW-9717096COM	9	EA	2000.00	18000.00
ADVT06	Advent Systems	Indianapolis	IN	United Packaging	08/01/20	300001	20	HAM-CP	10	EA	5.00	50.00
AHCA01	AHC Associates	Nashville	TN	Moon and Mammy	08/02/20	300002	20	AW-9717096COM	8	EA	2000.00	16000.00
AJGA01	AJ Gastright	Columbus	OH	Moon and Mammy	08/02/20	300002	10	SADIE-TASK-5	3	EA	100.00	300.00
ALEB04	Alex Brothers	Indianapolis	IN	Banners by Sam	08/03/20	300004	20	HAM-3-HOLE	5	EA	7.00	35.00
ALEB01	Allebra Solutions	Indianapolis	IN	Banners by Sam	08/03/20	300004	10	MSI-M046	9	EA	500.00	4500.00
AMEA03	American Amex	Cincinnati	OH	DSC Laminating	08/03/20	300003	10	GLOB-1900	7	EA	800.00	5600.00
AME02	American Enterprises	Cincinnati	OH	DSC Laminating	08/03/20	300003	20	SADIE-TASK-5	2	EA	100.00	200.00
AVOP01	Avon Products	Indianapolis	IN	East Lake Properties	08/03/20	300005	10	BRO-L5800DW	1	EA	400.00	400.00
BANS01	Banners by Sam	Indianapolis	IN	East Lake Properties	08/03/20	300005	20	MC-8	2	EA	10.00	20.00
BODY01	Body Works	Columbus	OH	Norwood Sandwiches	08/03/20	300006	20	BIC-50790	1	EA	15.00	15.00
BRAE03	Bradley Enterprises	Indianapolis	IN	Norwood Sandwiches	08/03/20	300006	10	HP-TP01-1036	4	EA	700.00	2800.00
BREA01	Breakford Inc	Columbus	OH	Illinois Solutions	08/04/20	300008	10	LNV-15IIL05	2	EA	800.00	1600.00
CARW07	Car Wash Systems	Columbus	OH	Illinois Solutions	08/04/20	300008	20	MC-8	8	EA	10.00	80.00
CATC01	Cat and Company	Columbus	OH	Kennington University	08/04/20	300009	20	EPSON-5800	10	EA	800.00	8000.00
CBRE02	Central Boxes	Nashville	TN	Kennington University	08/04/20	300009	10	HP-MP	1	EA	8.00	8.00
CHIWO1	Chicago Worthington	Indianapolis	IN	Schedule Storage	08/04/20	300007	20	LZB-44762	8	EA	300.00	2400.00
CICT01	City of Congress	Nashville	TN	Schedule Storage	08/04/20	300007	10	SH-BLK-36	1	EA	25.00	25.00
CLEP01	Cleptone Hearing	Indianapolis	IN									
CLOC03	Clocks by Charlie	Indianapolis	IN									
COCC01	CocaCola	Indianapolis	IN									
CONC05	Consolidated Trucking	Indianapolis	IN									
Total											90808.00	502305.00

Power BI – Open Orders Detail...Single Filter Example

Year

Quarter

Month

Week

+

2015 2016 2017 2018 2019 2020

Q1 Q2 Q3 Q4

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

All ▼

Sales

Gross Profit

GP %

SalesPerson

Category

Ship-To State

Customer Type

94.24K

2.09K

22.6%

All ▼

All ▼

All ▼

All ▼

Open Orders Details

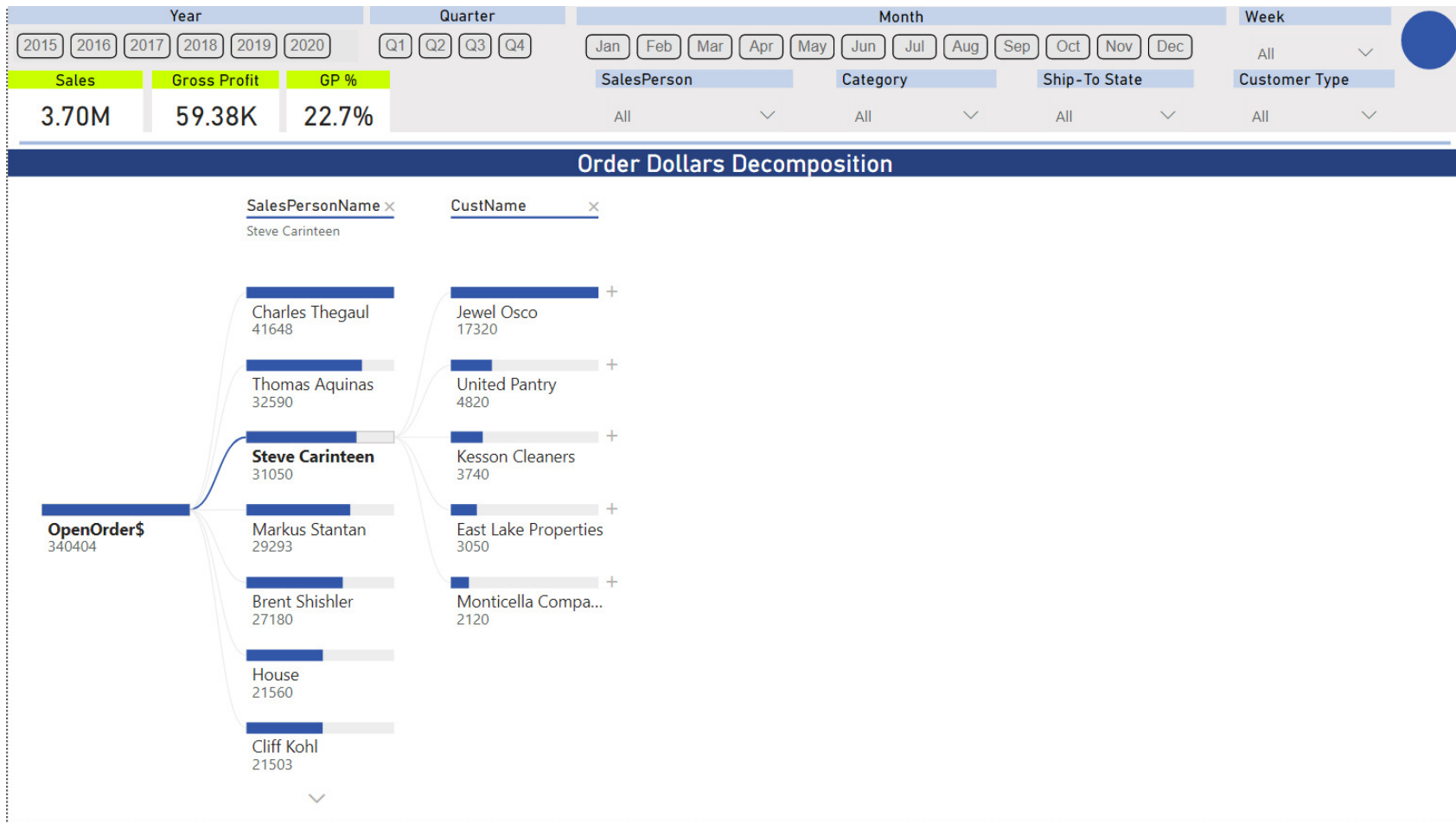
Customers

CustNo	Customer Name	City	State
ADVH02	Advanced Health Care	Columbus	OH
ADVT06	Advent Systems	Indianapolis	IN
AHCA01	AHC Associates	Nashville	TN
AJGA01	AJ Gastright	Columbus	OH
ALEB04	Alex Brothers	Indianapolis	IN
ALEB01	Allebra Solutions	Indianapolis	IN
AMEA03	American Amex	Cincinnati	OH
AME02	American Enterprises	Cincinnati	OH
AVOP01	Avon Products	Indianapolis	IN
BANS01	Banners by Sam	Indianapolis	IN
BODY01	Body Works	Columbus	OH
BRAE03	Bradley Enterprises	Indianapolis	IN
BREA01	Breakford Inc	Columbus	OH
CARW07	Car Wash Systems	Columbus	OH
CATC01	Cat and Company	Columbus	OH
CBRE02	Central Boxes	Nashville	TN
CHIW01	Chicago Worthington	Indianapolis	IN
CICT01	City of Congress	Nashville	TN
CLEP01	Cleptone Hearing	Indianapolis	IN
CLOC03	Clocks by Charlie	Indianapolis	IN
COCC01	CocaCola	Indianapolis	IN
CONC05	Consolidated Trucking	Indianapolis	IN

Order Detail

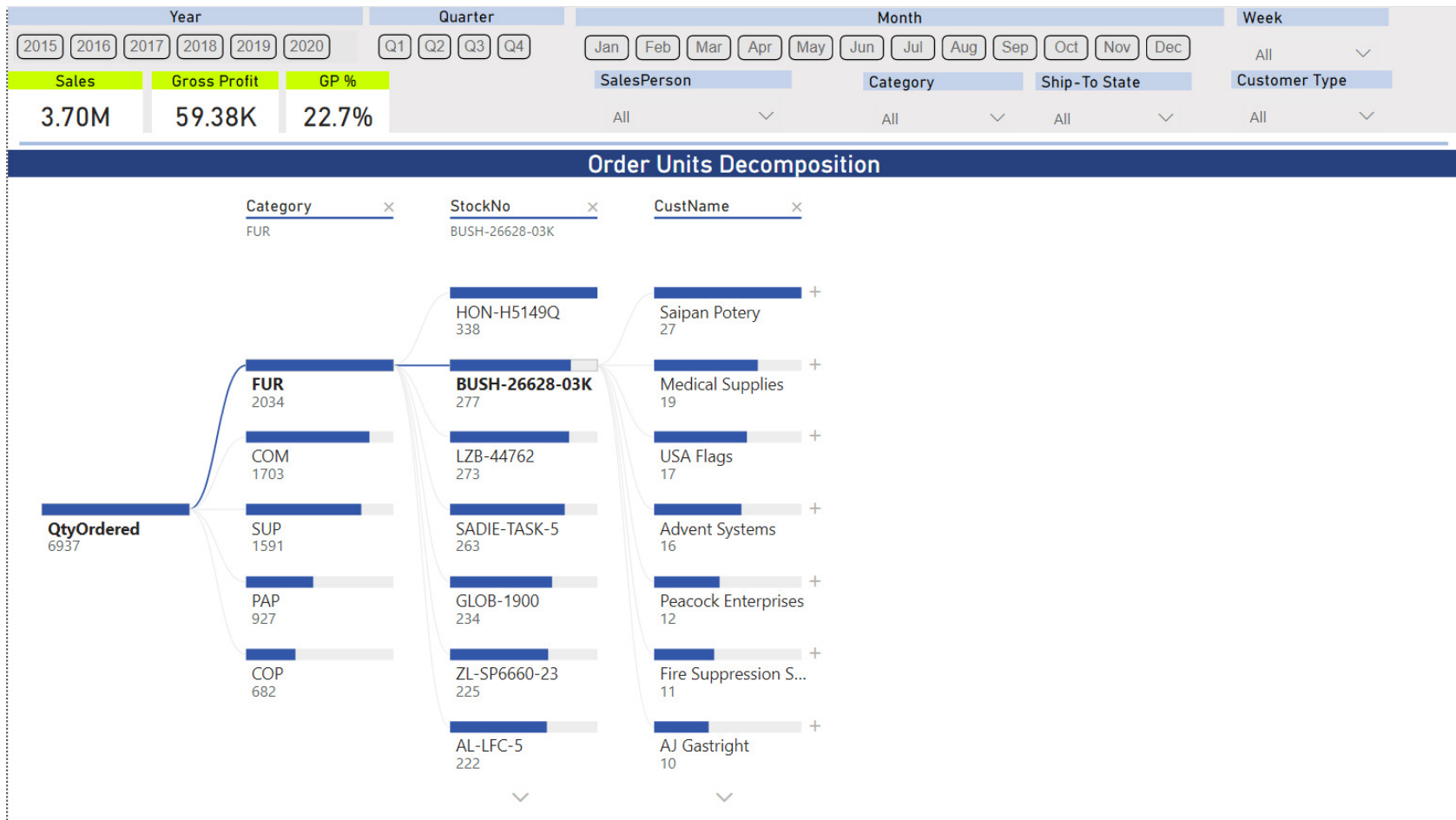
Customer Name	OrderDate	Order#	Line	Item #	Ordered	UOM	UnitPrice	Amount
Banners by Sam	08/03/20	300004	20	HAM-3-HOLE	5	EA	7.00	35.00
Banners by Sam	08/03/20	300004	10	MSI-M046	9	EA	500.00	4500.00
Banners by Sam	09/02/20	300077	20	GLOB-1900	7	EA	800.00	5600.00
Banners by Sam	09/02/20	300077	10	LZB-44762	5	EA	300.00	1500.00
Total							1607.00	11635.00

Power BI – Open Orders \$ Decomposition



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Power BI – Open Orders Units Decomposition



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Power BI

Coming Soon

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Power BI - Sales Customer Matrix

Sales Customer Matrix

CustType	2015	2016	2017	2018	2019	2020	Total
A	19,853.00	16,972.00	135.00	41,243.00	2,015.00	15,060.00	95,278.00
B	16,990.00	48,500.00	33,145.00	26,037.00	47,470.00	12,917.00	185,059.00
C	56,811.00	66,596.00	70,326.00	88,607.00	70,556.00	63,301.00	416,197.00
D	124,255.00	57,018.00	69,290.00	60,406.00	54,619.00	80,370.00	445,958.00
E	73,854.00	64,976.00	122,854.00	142,817.00	77,090.00	65,022.00	546,613.00
Becky Smoot	3,636.00	3,685.00	15,000.00	9,835.00		88.00	32,244.00
Kennington University	3,636.00	3,685.00	15,000.00	9,835.00		88.00	32,244.00
Jerry Brickhouse	13,500.00		45.00		24,800.00		38,345.00
John Menke	11,630.00	15,575.00	5,047.00	32,635.00			64,887.00
Justin Case	4,200.00	15,228.00	5,100.00	16,900.00	4,500.00	7,664.00	53,592.00
Kay Coleman		1,528.00	12,032.00			830.00	14,390.00
Kim Slick	7,192.00		12,125.00	5,822.00	125.00	320.00	25,584.00
Mark Madhouse			2,430.00	11,200.00		8,415.00	22,045.00
Markus Stantan	9,400.00	4,200.00	22,335.00		13,145.00	6,649.00	55,729.00
Rick Dicarido		3,000.00	13,500.00	15,000.00	5,000.00	10,756.00	47,256.00
Sam Kennison	166.00	12,060.00	22,800.00	36,525.00	27,880.00	30,300.00	129,731.00
United Pantry	166.00	3,490.00	4,400.00	2,225.00	21,900.00	30,300.00	62,481.00
Weisman Memorial Hospital		8,570.00	18,400.00	34,300.00	5,980.00		67,250.00
Thomas Aquinas	24,130.00	9,700.00	12,440.00	14,900.00	1,640.00		62,810.00
F	147,651.00	65,368.00	94,603.00	95,507.00	73,693.00	142,262.00	619,084.00
G	69,054.00	129,723.00	121,525.00	102,646.00	162,178.00	82,119.00	667,245.00
H	96,354.00	191,219.00	77,590.00	109,623.00	193,297.00	60,384.00	728,467.00
Total	604,822.00	640,372.00	589,468.00	666,886.00	680,918.00	521,435.00	3,703,901.00

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Power BI - Sales Product Matrix

Sales Product Matrix							
LocationNo	2015	2016	2017	2018	2019	2020	Total
101	231,070.00	218,756.00	99,493.00	291,589.00	238,534.00	154,410.00	1,233,852.00
Computers	136,700.00	101,500.00	55,000.00	140,500.00	140,900.00	72,900.00	647,500.00
Copiers	42,800.00	29,600.00	18,800.00	21,600.00	26,800.00	20,400.00	160,000.00
Furniture	49,900.00	86,000.00	23,900.00	128,200.00	69,500.00	60,100.00	417,600.00
4-Drawer Vertical File Cabinet	6,900.00	6,900.00	6,600.00	5,400.00	15,300.00	2,700.00	43,800.00
Ameriwood Office Bundle	18,000.00	30,000.00		38,000.00	24,000.00	20,000.00	130,000.00
Bush 60in Executive Desk	600.00	4,200.00	1,800.00	29,400.00	13,200.00	7,200.00	56,400.00
Five-Drawer Lateral File Cabinet	10,800.00	1,200.00	8,400.00	28,800.00	7,200.00		56,400.00
Global 1900 Lateral File Cabinet	2,400.00	32,800.00	3,200.00	15,200.00	6,400.00	14,400.00	74,400.00
La-Z-Boy Leather Exec Chair	3,000.00	5,700.00		7,800.00		3,900.00	20,400.00
Sadie Mid-Back Task Chair	700.00	2,500.00	900.00	900.00	1,000.00	2,900.00	8,900.00
Z-Line Lateral File Cabinet	7,500.00	2,700.00	3,000.00	2,700.00	2,400.00	9,000.00	27,300.00
Paper	466.00	373.00	405.00	378.00	84.00	195.00	1,901.00
Supplies	1,204.00	1,283.00	1,388.00	911.00	1,250.00	815.00	6,851.00
102	177,121.00	262,982.00	304,238.00	127,685.00	245,736.00	174,028.00	1,291,790.00
Computers	98,800.00	158,600.00	177,700.00	62,000.00	148,300.00	78,800.00	724,200.00
Copiers	15,200.00	4,800.00	18,400.00	18,000.00	12,000.00	14,400.00	82,800.00
Furniture	62,100.00	98,500.00	106,500.00	46,000.00	83,600.00	79,400.00	476,100.00
Paper	313.00	138.00	581.00	255.00	386.00	184.00	1,857.00
Supplies	708.00	944.00	1,057.00	1,430.00	1,450.00	1,244.00	6,833.00
103	196,631.00	158,634.00	185,737.00	247,612.00	196,648.00	192,997.00	1,178,259.00
Computers	129,800.00	90,700.00	79,000.00	113,500.00	132,400.00	95,200.00	640,600.00
Copiers	13,200.00	20,400.00	13,600.00	20,000.00	30,400.00	22,400.00	120,000.00
Furniture	52,000.00	45,600.00	91,300.00	112,700.00	32,500.00	73,100.00	407,200.00
Paper	360.00	332.00	572.00	184.00	317.00	653.00	2,418.00
Supplies	1,271.00	1,602.00	1,265.00	1,228.00	1,031.00	1,644.00	8,041.00
Total	604,822.00	640,372.00	589,468.00	666,886.00	680,918.00	521,435.00	3,703,901.00

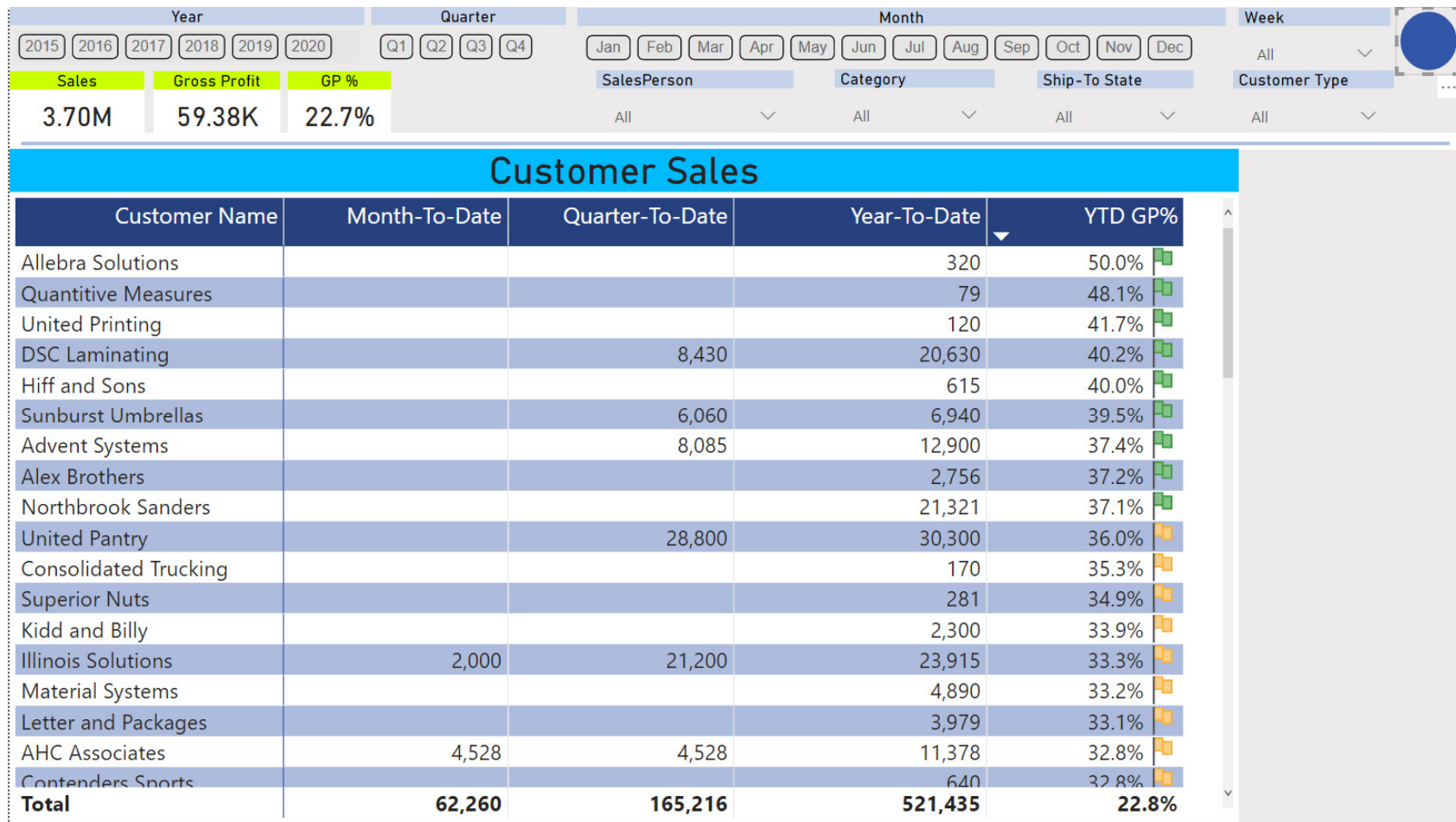
SPA2020 Southware User Conference

Power BI – Invoice Summary

Year			Quarter				Month												Week			
2015	2016	2017	2018	2019	2020	Q1	Q2	Q3	Q4	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	All
Sales			Gross Profit			GP %			SalesPerson				Category				Ship-To State				Customer Type	
3.70M			59.38K			22.7%			All				All				All				All	
Invoice Summary																						
InvDate	Invoice #	Typ	Ordered	Order#	Cust#	Customer Name	Salesperson	ShipToName	ShipToCity	ShipSt	Amount	GP%										
01/05/15	150101	R	01/05/15	150101	MEDT02	Medallion Transmissions	Sam Kennison	Medallion Transmissions	Cincinnati	OH	2,600.00	23.1%										
01/05/15	150102	R	01/05/15	150102	NORS80	Northbrook Sanders	Jerry Brickhouse	Northbrook Sanders	Columbus	OH	2,800.00	33.6%										
01/12/15	150103	R	01/12/15	150103	REX01	Rexion Filters	Jerry Brickhouse	Rexion Filters	Indianapolis	IN	13,500.00	22.2%										
01/12/15	150104	R	01/12/15	150104	ELMC02	Elm Street Coffee	John Menke	Elm Street Coffee	Indianapolis	IN	3,100.00	29.0%										
01/19/15	150105	R	01/19/15	150105	LETP04	Letter and Packages	James Clown	Letter and Packages	Atlanta	GA	1,870.00	34.0%										
01/19/15	150106	R	01/19/15	150106	WEBS02	Weber Supply	Kim Slick	Weber Supply	Chicago	IL	6,316.00	14.3%										
01/26/15	150107	R	01/26/15	150107	CATC01	Cat and Company	Justin Case	Cat and Company	Columbus	OH	10,518.00	13.4%										
01/26/15	150108	R	01/26/15	150108	USA07	USA Flags	James Clown	USA Flags	Chicago	IL	5,100.00	27.5%										
02/02/15	150109	R	02/02/15	150109	ALEB04	Alex Brothers	William Sedona	Alex Brothers	Dayton	OH	6,400.00	25.0%										
02/02/15	150110	R	02/02/15	150110	EASL07	East Lake Properties	Becky Smoot	East Lake Properties	Cincinnati	OH	5,200.00	17.3%										
02/09/15	150111	R	02/09/15	150111	EVAN01	Evan Landscaping	James Clown	Evan Landscaping	Huntington	WV	3,654.00	25.1%										
02/09/15	150112	R	02/09/15	150112	STEL03	Sterling Coatings	Kay Coleman	Sterling Coatings	Chicago	IL	3,000.00	20.0%										
02/16/15	150113	R	02/16/15	150113	MATS02	Material Systems	George Throne	Material Systems	Chicago	IL	3,045.00	13.4%										
02/16/15	150114	R	02/16/15	150114	MONC02	Monticella Companies	Rick Dicarido	Monticella Companies	Birmingham	AL	2,445.00	24.9%										
02/23/15	150115	R	02/23/15	150115	CLEP01	Cleptone Hearing	Eric Grate	Cleptone Hearing	Cincinnati	OH	22,500.00	16.0%										
02/23/15	150116	R	02/23/15	150116	HAWR03	Hathaway Inc	John Menke	Hathaway Inc	Indianapolis	IN	1,680.00	14.3%										
03/02/15	150117	R	03/02/15	150117	SCHS54	Schedule Storage	John Menke	Schedule Storage	Louisville	KY	635.00	32.3%										
03/02/15	150118	R	03/02/15	150118	EVAN03	Evan Trucking	Steve Carinteen	Evan Trucking	Louisville	KY	7,800.00	33.3%										
Total											3,703,901.00	22.7%										

SPA2020 Southware User Conference

Power BI – Customer Sales...More KPIs Coming



SPA2020 Southware User Conference

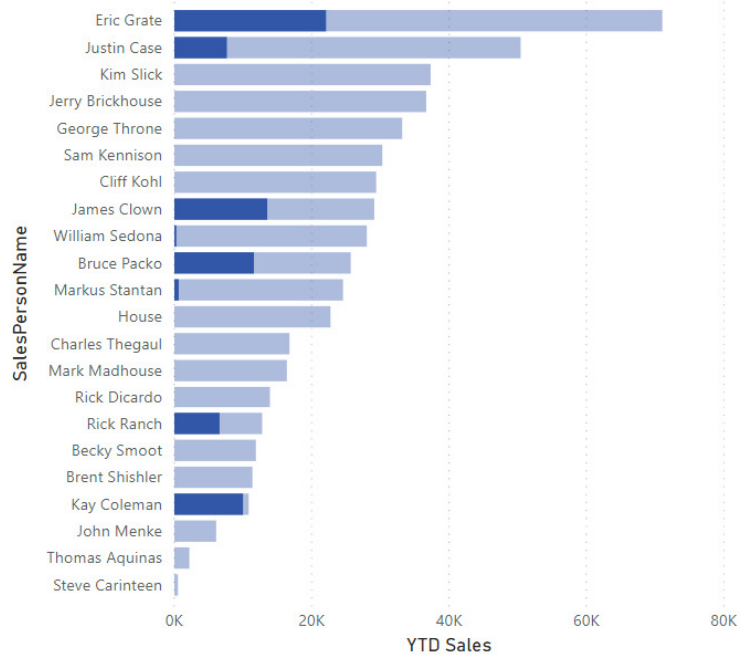
Power BI – New Customers Added

New Customers Added																		
SalespersonNo	2018	2017	2016	2015	2014	2013	2012	2011	2007	2006	2005	2004	2003	2002	2001	2000	1999	1998
108		1																2
171		1			2	1			1									3
199		1							1					2				
Consolidated Trucking														1				
Hathaway Inc		1																
Shamrock Gifts									1									
Sunshine Spas														1				
250		1			1	1						1						5
256										1								1
304	1	1				1										1		2
308		2																2
334	1					1			1									1
337			1							1				1			1	1
346		1	1											1				
351																		1
352		3																
354		1		1														3
359		1					1									1		3
American Amex																1		
Banners by Sam																		1
Bradley Enterprises																		1
Elm Street Coffee																		1
MM Matherson		1																
The Polarny							1											
Total	3	18	4	4	6	6	1	2	3	3	3	1	1	4	1	3	3	34

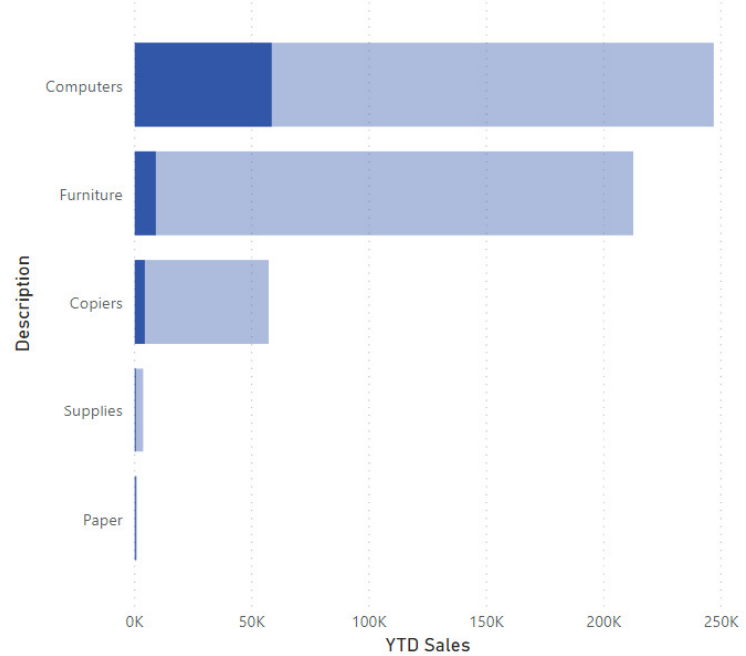
SPA2020 Southware User Conference

Power BI – Sales Animation

YTD Sales by SalesPerson



YTD Sales by Category

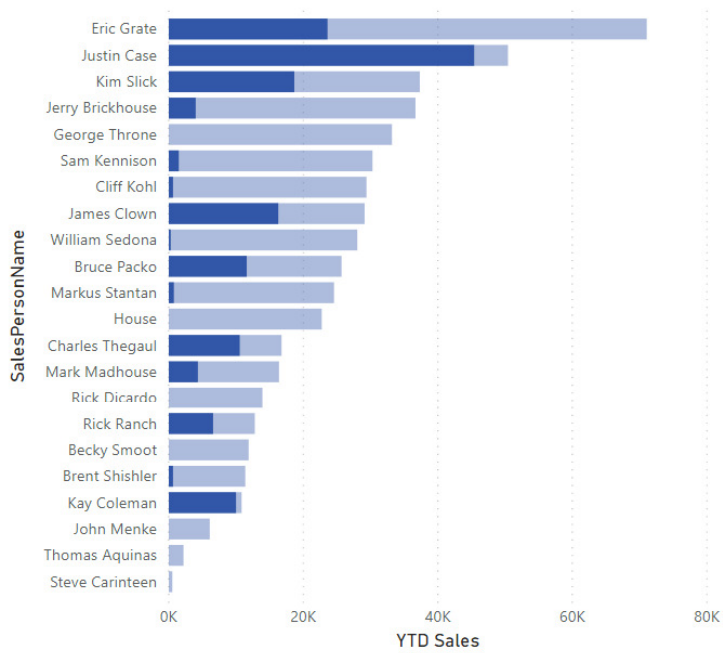


YearMo 2020-01

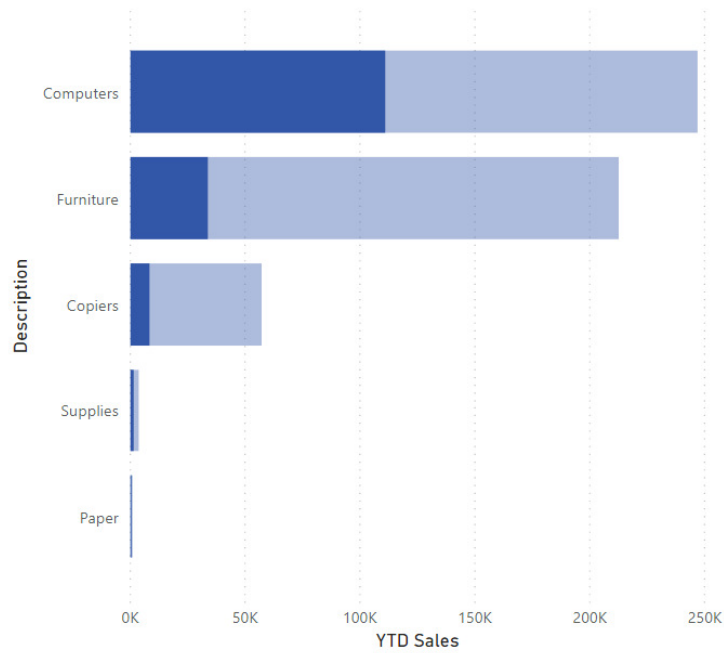
SPA2020 Southware User Conference

Power BI – Sales Animation

YTD Sales by SalesPerson



YTD Sales by Category



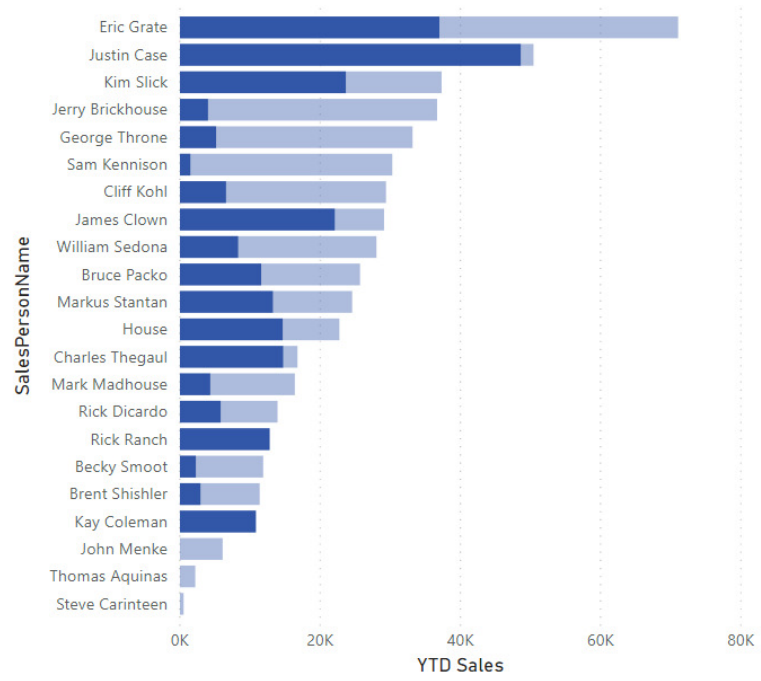
YearMo 2020-03

⏪ ⏩ ⏸ ⏹ ⏴ ⏵

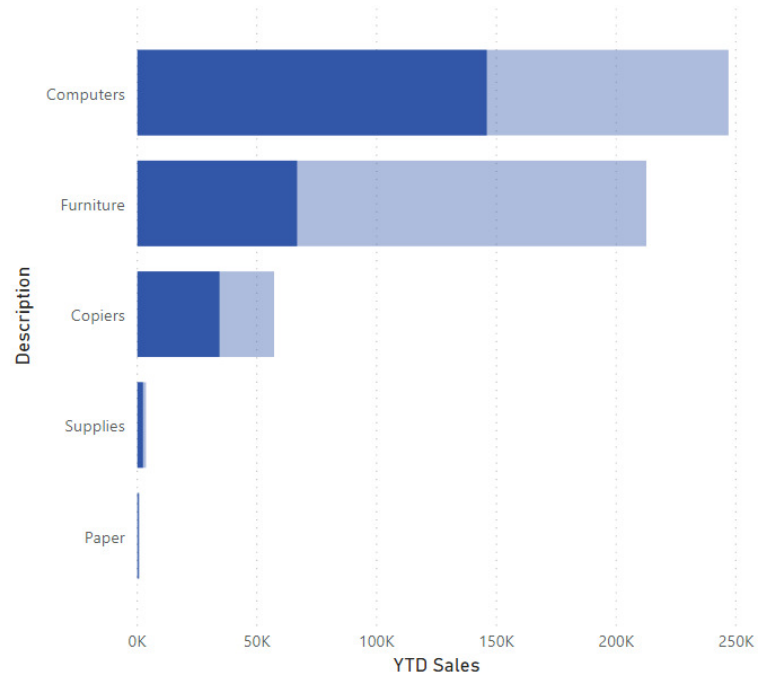
SPA2020 Southware User Conference

Power BI – Sales Animation

YTD Sales by SalesPerson



YTD Sales by Category



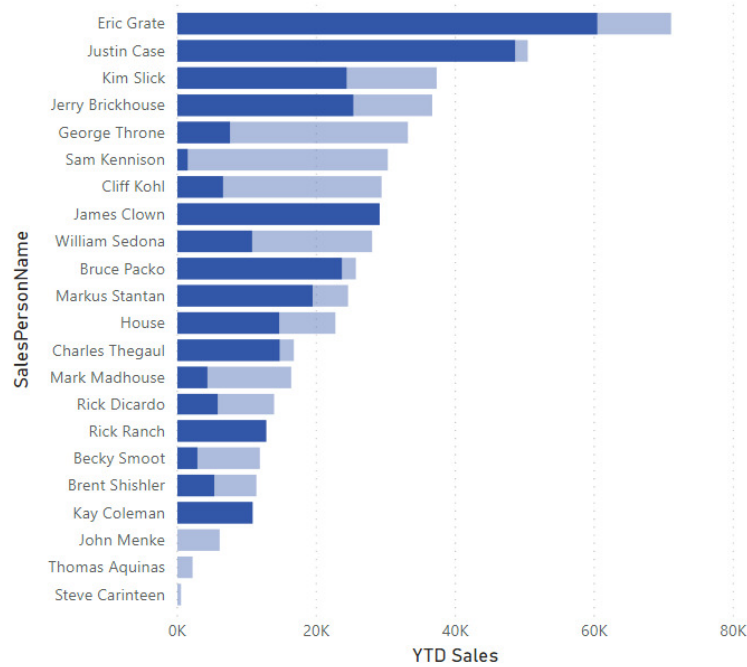
YearMo 2020-06

▶ || ◼ ◀ ▶▶

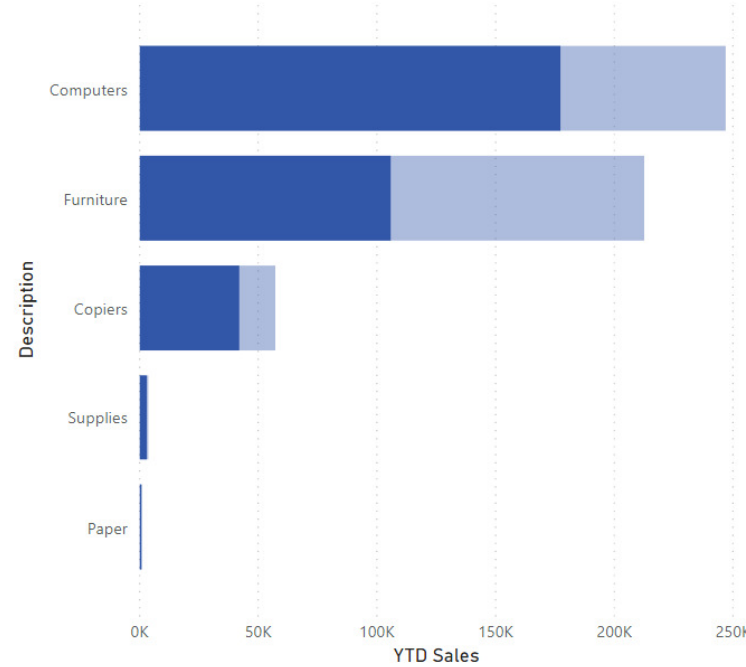
SPA2020 Southware User Conference

Power BI – Sales Animation

YTD Sales by SalesPerson



YTD Sales by Category



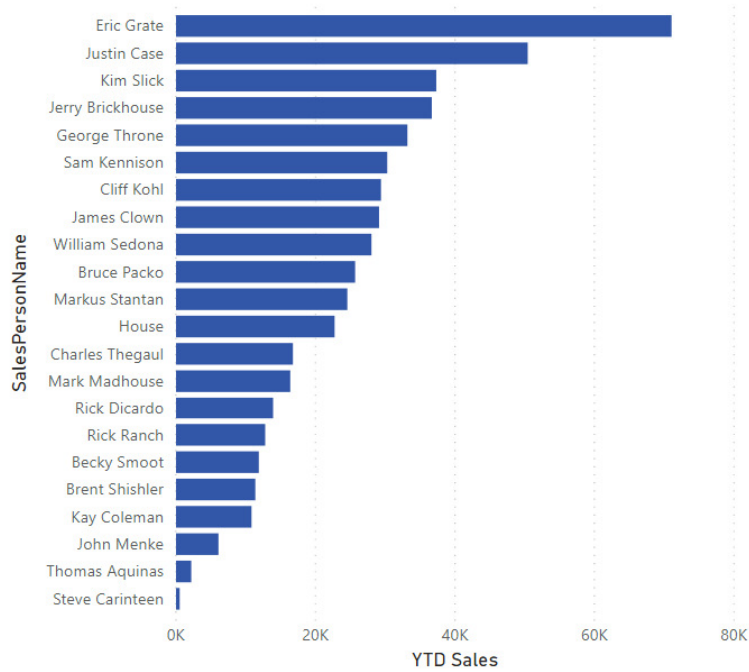
YearMo 2020-08

▶ || ◼ ◀ ▶▶

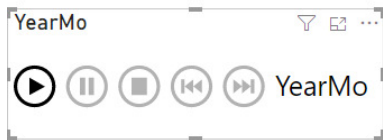
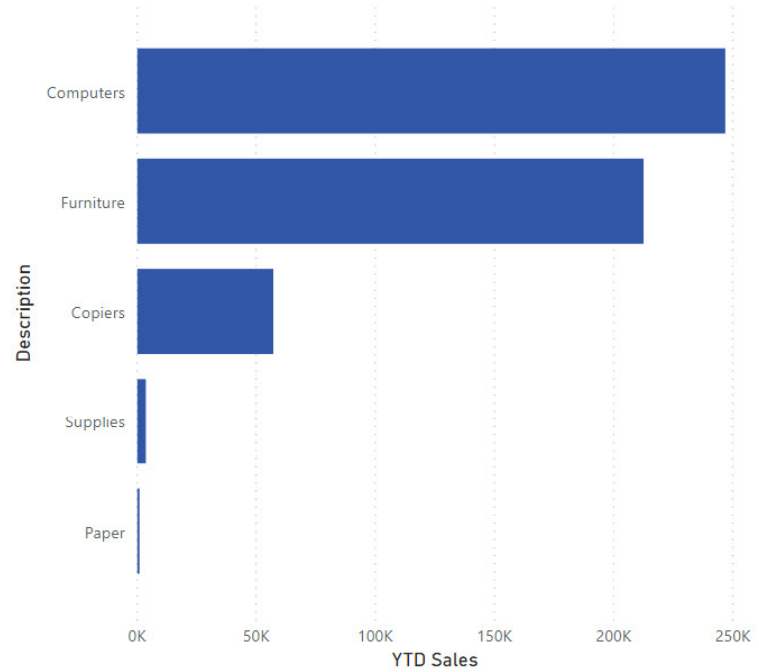
SPA2020 Southware User Conference

Power BI – Sales Animation

YTD Sales by SalesPerson



YTD Sales by Category



SPA2020 Southware User Conference

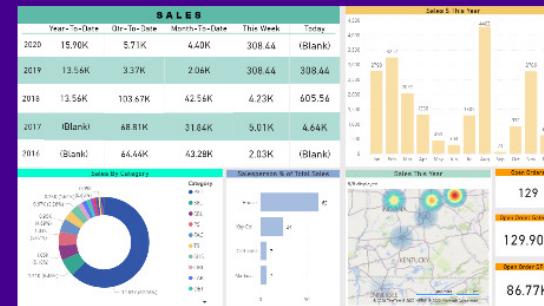
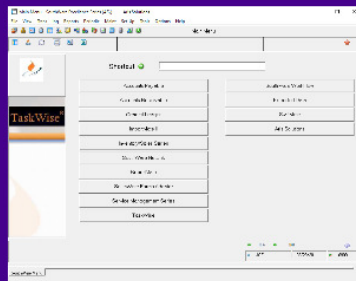
Power BI

Extract Utility

SPA2020 Southware User Conference

Power BI

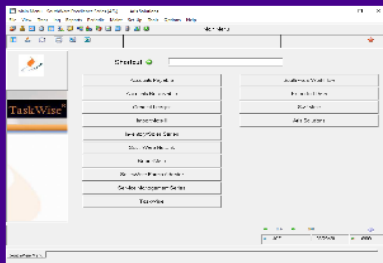
Power BI for SouthWare



SPA2020 Southware User Conference

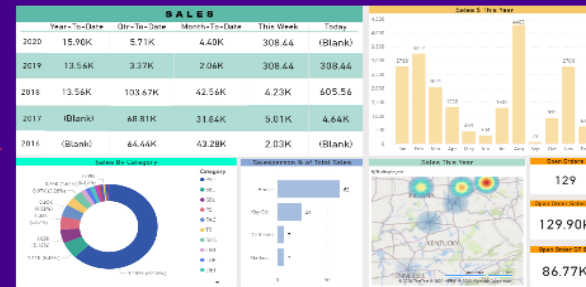
Power BI

Power BI for SouthWare



Power BI
Template

Extract
Utility



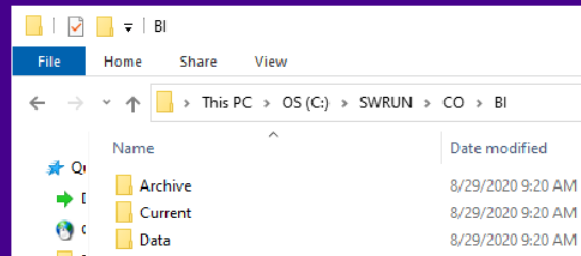
SPA2020 Southware User Conference

Power BI

Power BI Extract Utility for SouthWare

Power BI Installation

Create Power BI Folder
and Sub-folders



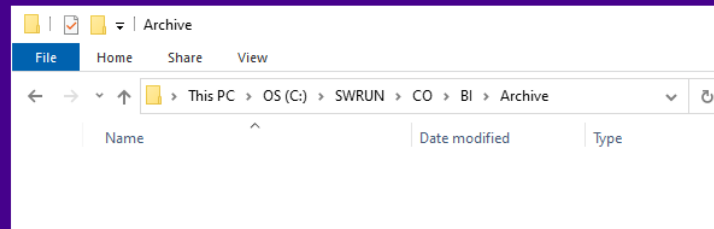
SPA2020 Southware User Conference

Power BI

Power BI Extract Utility for SouthWare

Power BI Installation

Build Archive History
Files for Last 5 Years

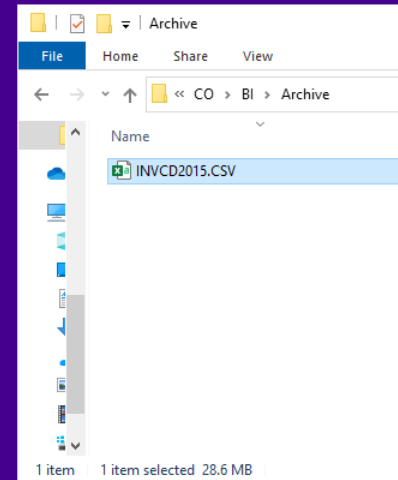


SPA2020 Southware User Conference

Power BI

Power BI Extract Utility for SouthWare

Power BI
Extract Utility

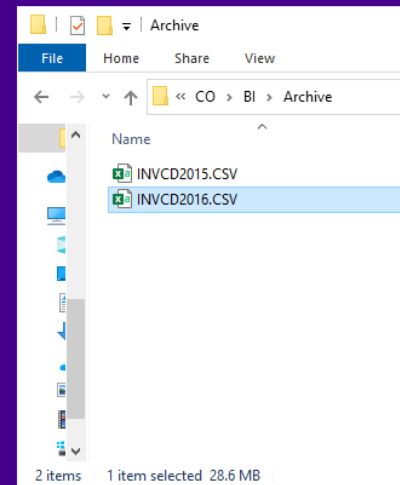


SPA2020 Southware User Conference

Power BI

Power BI Extract Utility for SouthWare

Power BI
Extract Utility

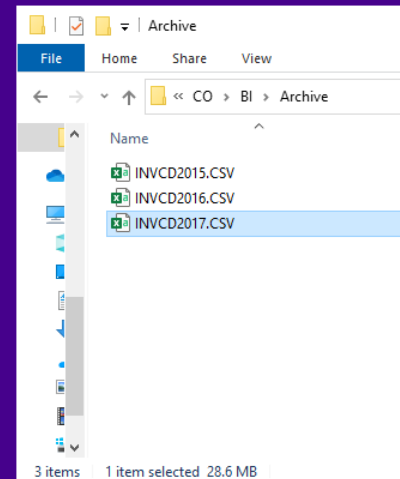


SPA2020 Southware User Conference

Power BI

Power BI Extract Utility for SouthWare

Power BI
Extract Utility

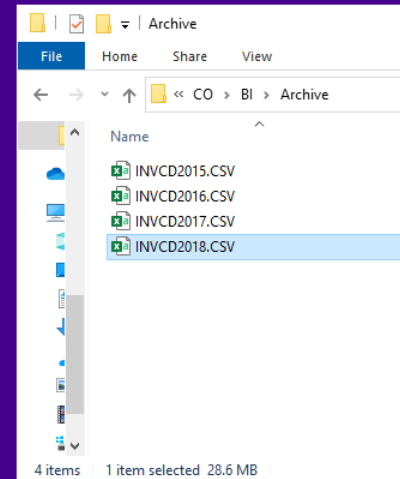


SPA2020 Southware User Conference

Power BI

Power BI Extract Utility for SouthWare

Power BI
Extract Utility

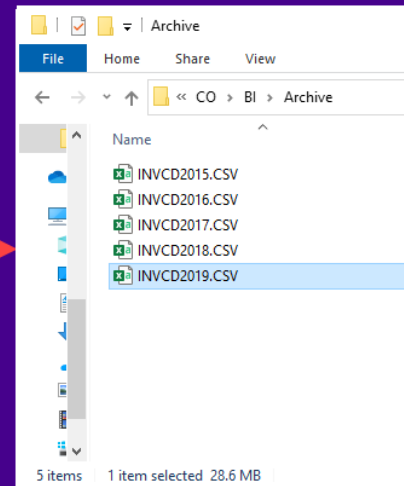


SPA2020 Southware User Conference

Power BI

Power BI Extract Utility for SouthWare

Power BI
Extract Utility

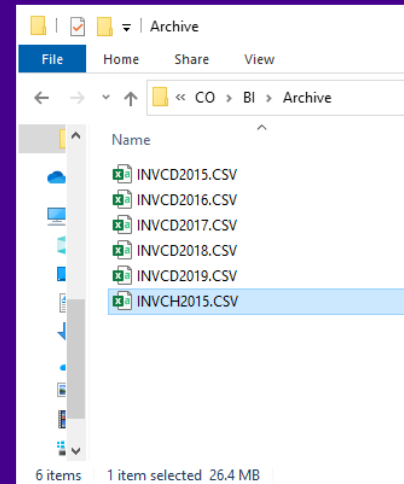


SPA2020 Southware User Conference

Power BI

Power BI Extract Utility for SouthWare

Power BI
Extract Utility

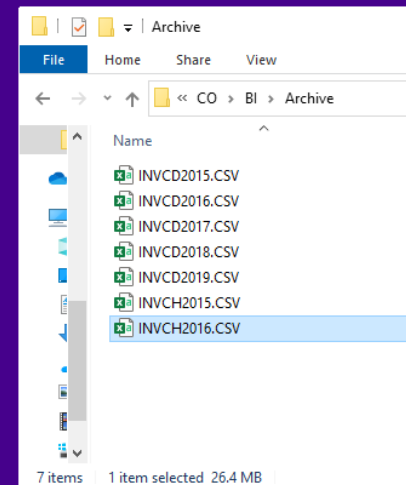


SPA2020 Southware User Conference

Power BI

Power BI Extract Utility for SouthWare

Power BI
Extract Utility

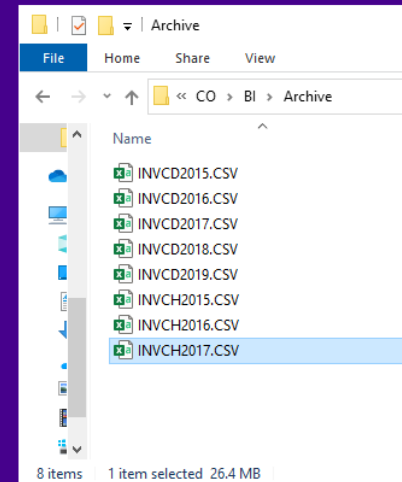


SPA2020 Southware User Conference

Power BI

Power BI Extract Utility for SouthWare

Power BI
Extract Utility

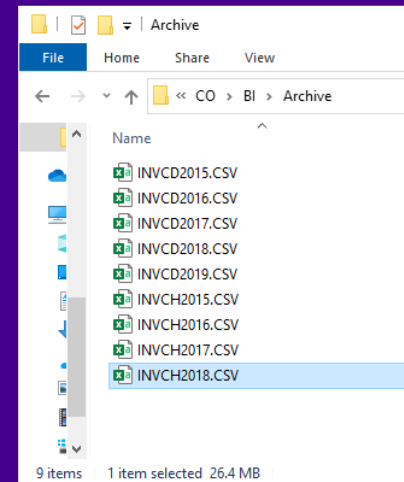


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Power BI

Power BI Extract Utility for SouthWare

Power BI
Extract Utility

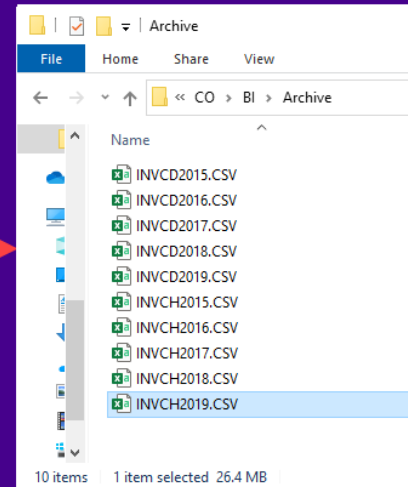


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Power BI Extract Utility for SouthWare

Power BI
Extract Utility



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Power BI

FM-Aris BI File Control Records

*1. BI Focus	SALES	
*2. Priority	1	
*3. Name	InvoiceDetail	
4. Description	RS11	20. Active <input checked="" type="checkbox"/>
5. Archive Folder	C:\SWRUN\CO\BI\Archive\	
6. Current Folder	C:\SWRUN\CO\BI\Current\	
7. Archive/Current File Mask	INVCD**	
8. Output Folder	C:\SWRUN\CO\BI\Data\	
9. Output File Name	InvoiceDetail.CSV	
10. ReportMate Name	BHINVCD	
11. RM RCF Object Name	BIINVCDRCF	
12. Last Run Date	08/02/20	
13. Last Run Start Time	931	
14. Last Run End Time	931	
15. Last Run Last File	INVCD.CSV	
16. Last Run Last Key	"210809"	
17. Last Run Status	Completed	
18. Last Run Message	Extract Completed	
19. Last Run Error		

to change - [OK] [Cancel]

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SouthWare Menu ABIFLCTM

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Power BI

Power BI Extract Utility for SouthWare

FM-Aris BI File Control Records

*1. BI Focus	SALES
*2. Priority	1
*3. Name	InvoiceDetail
4. Description	RS11 20. Active <input checked="" type="checkbox"/>
5. Archive Folder	C:\SWRUN\CO\BI\Archive\
6. Current Folder	C:\SWRUN\CO\BI\Current\
7. Archive/Current File Mask	INVCD*.*
8. Output Folder	C:\SWRUN\CO\BI\Data\
9. Output File Name	InvoiceDetail.CSV
10. ReportMate Name	BI-INVCD
11. RM RCF Object Name	BIINVCDRCF
12. Last Run Date	08/02/20
13. Last Run Start Time	931
14. Last Run End Time	931
15. Last Run Last File	INVCD.CSV
16. Last Run Last Key	"210809"
17. Last Run Status	Completed
18. Last Run Message	Extract Completed
19. Last Run Error	

to change

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Power BI Extract Utility for SouthWare

FM-Aris BI File Control Records

*1. BI Focus	SALES		
*2. Priority	1		
*3. Name	InvoiceDetail		
4. Description	RS11	20. Active	<input checked="" type="checkbox"/>
5. Archive Folder	C:\SWRUN\CO\BI\Archive\		
6. Current Folder	C:\SWRUN\CO\BI\Current\		
7. Archive/Current File Mask	INVCD*.*		
8. Output Folder	C:\SWRUN\CO\BI\Data\		
9. Output File Name	InvoiceDetail.CSV		
10. ReportMate Name	BHINVCD		
11. RM RCF Object Name	BIINVCDRCF		
12. Last Run Date	08/02/20		
13. Last Run Start Time	931		
14. Last Run End Time	931		
15. Last Run Last File	INVCD.CSV		
16. Last Run Last Key	*210809*		
17. Last Run Status	Completed		
18. Last Run Message	Extract Completed		
19. Last Run Error			

to change

OK Cancel

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Power BI Extract Utility for SouthWare

FM-Aris BI File Control Records

*1. BI Focus	SALES		
*2. Priority	1		
*3. Name	InvoiceDetail		
4. Description	RS11	20. Active	<input checked="" type="checkbox"/>
5. Archive Folder	C:\SWRUN\CO\BI\Archive\		
6. Current Folder	C:\SWRUN\CO\BI\Current\		
7. Archive/Current File Mask	INVCD*.*		
8. Output Folder	C:\SWRUN\CO\BI\Data\		
9. Output File Name	InvoiceDetail.CSV		
10. ReportMate Name	BHINVCD		
11. RM RCF Object Name	BIINVCDRCF		
12. Last Run Date	08/02/20		
13. Last Run Start Time	931		
14. Last Run End Time	931		
15. Last Run Last File	INVCD.CSV		
16. Last Run Last Key	*210809*		
17. Last Run Status	Completed		
18. Last Run Message	Extract Completed		
19. Last Run Error			

to change - [OK] [Cancel]

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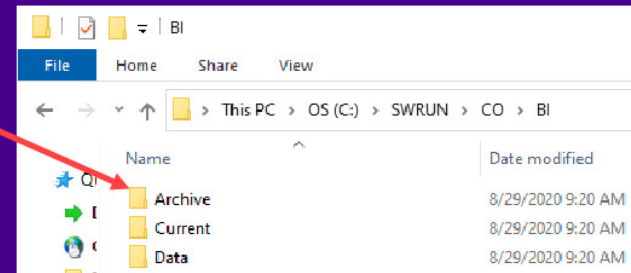
SouthWare Menu ABIFLCTM

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Power BI Extract Utility for SouthWare

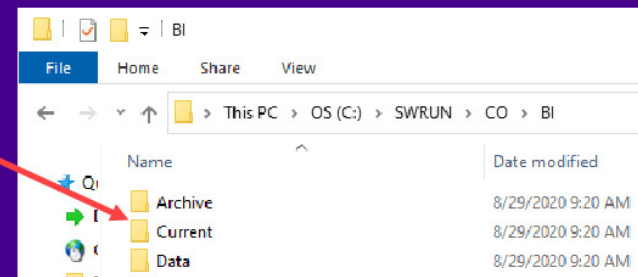
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7. Archive/Current File Mask	INVCD*.*
8. Output Folder	C:\SWRUN\CO\BI\Data\
9. Output File Name	InvoiceDetail.CSV
10. ReportMate Name	BHINVCD
11. RM RCF Object Name	BIINVCDRCF



Power BI

Power BI Extract Utility for SouthWare

5. Archive Folder	C:\SWRUN\CO\BI\Archive\
6. Current Folder	C:\SWRUN\CO\BI\Current\
7. Archive/Current File Mask	INVCD*.*
8. Output Folder	C:\SWRUN\CO\BI\Data\
9. Output File Name	InvoiceDetail.CSV
10. ReportMate Name	BHINVCD
11. RM RCF Object Name	BIINVCDRCF

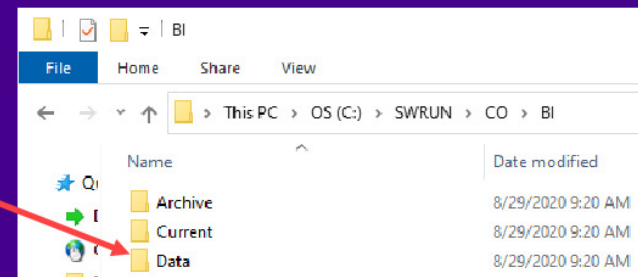


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Power BI Extract Utility for SouthWare

5. Archive Folder	C:\SWRUN\CO\BI\Archive\
6. Current Folder	C:\SWRUN\CO\BI\Current\
7. Archive/Current File Mask	INVC*.*
8. Output Folder	C:\SWRUN\CO\BI\Data\
9. Output File Name	InvoiceDetail.CSV
10. ReportMate Name	BHINVCD
11. RM RCF Object Name	BIINVCDRCF



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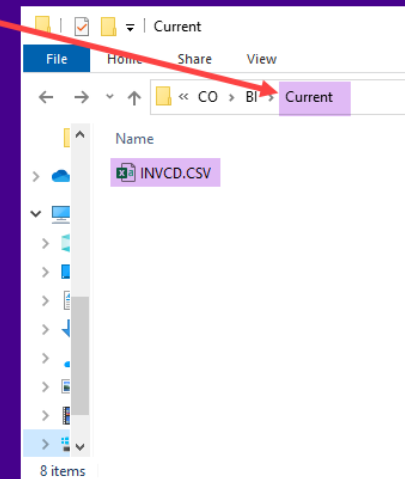
Power BI

Power BI Extract Utility for SouthWare

Step 1 - Extract Current Files

5. Archive Folder	C:\SWRUN\CO\BI\Archive\
6. Current Folder	C:\SWRUN\CO\BI\Current\
7. Archive/Current File Mask	INVCD*.*
8. Output Folder	C:\SWRUN\CO\BI\Data\
9. Output File Name	InvoiceDetail.CSV
10. ReportMate Name	BI-INVCD
11. RM RCF Object Name	BIINVCDRCF

Run a Report
Create a New Report Format
Maintain a Report Format
Support Programs
Grid View/Edit Tool (Windows only)
FYI Reporting Portal
FAST Indexing



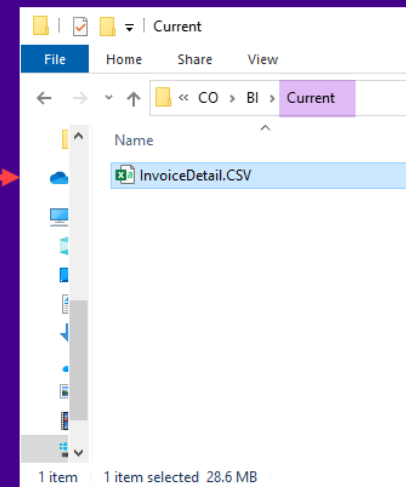
Power BI

Power BI Extract Utility for SouthWare

Step 1 - Extract Current Files

5. Archive Folder	C:\SWRUN\CO\BI\Archive\
6. Current Folder	C:\SWRUN\CO\BI\Current\
7. Archive/Current File Mask	INVC*.*
8. Output Folder	C:\SWRUN\CO\BI\Data\
9. Output File Name	InvoiceDetail.CSV
10. ReportMate Name	BHNVCD
11. RM RCF Object Name	BIINVCDFCF

- Run a Report
- Create a New Report Format
- Maintain a Report Format
- Support Programs
- Grid View/Edit Tool (Windows only)
- FYI Reporting Portal
- FAST Indexing



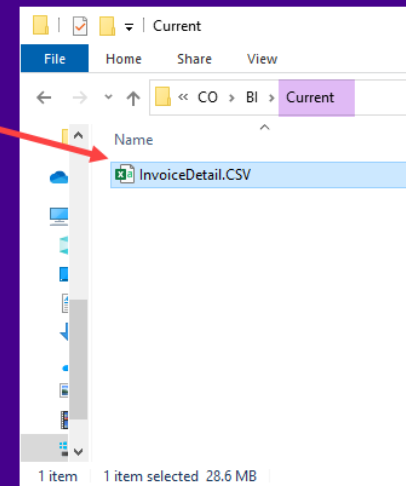
Power BI

Power BI Extract Utility for SouthWare

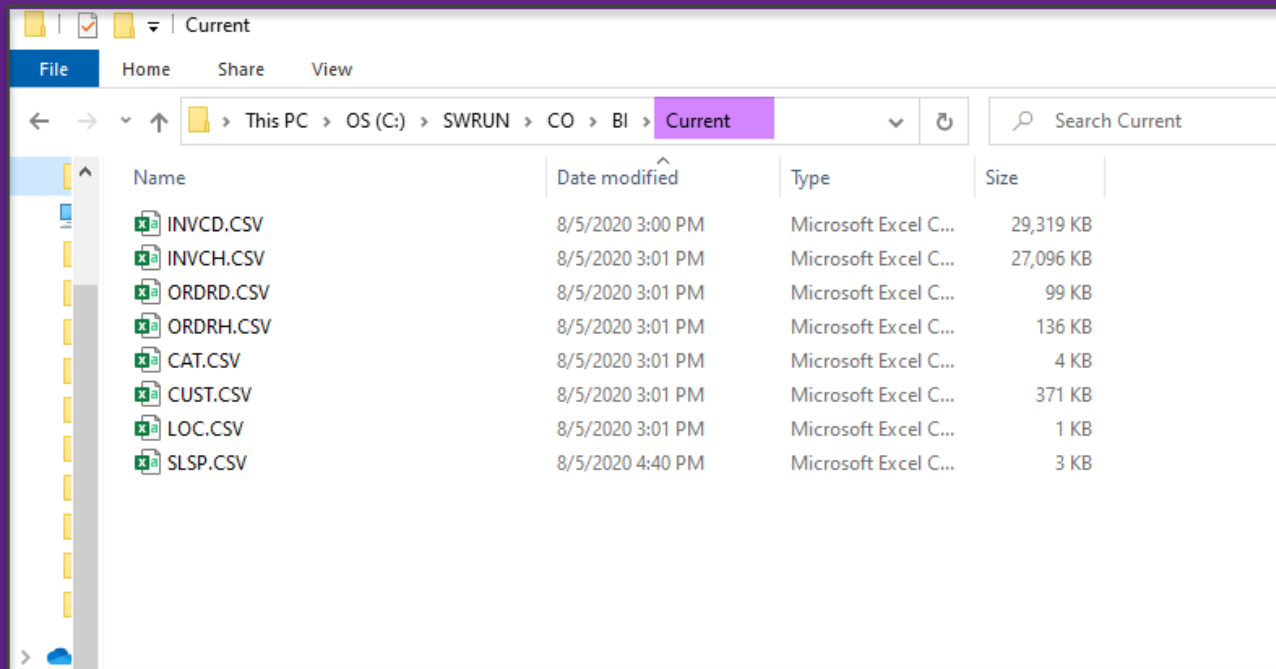
Step 1 - Extract Current Files

5. Archive Folder	C:\SWRUN\CO\BI\Archive\
6. Current Folder	C:\SWRUN\CO\BI\Current\
7. Archive/Current File Mask	INVCD**
8. Output Folder	C:\SWRUN\CO\BI\Data\
9. Output File Name	InvoiceDetail.CSV
10. ReportMate Name	BHINVCD
11. RM RCF Object Name	BIINVCDRCF

Run a Report
Create a New Report Format
Maintain a Report Format
Support Programs
Grid View/Edit Tool (Windows only)
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Power BI



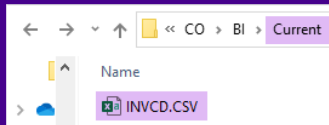
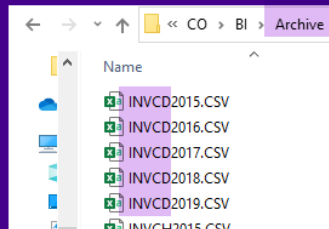
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Power BI Extract Utility for SouthWare

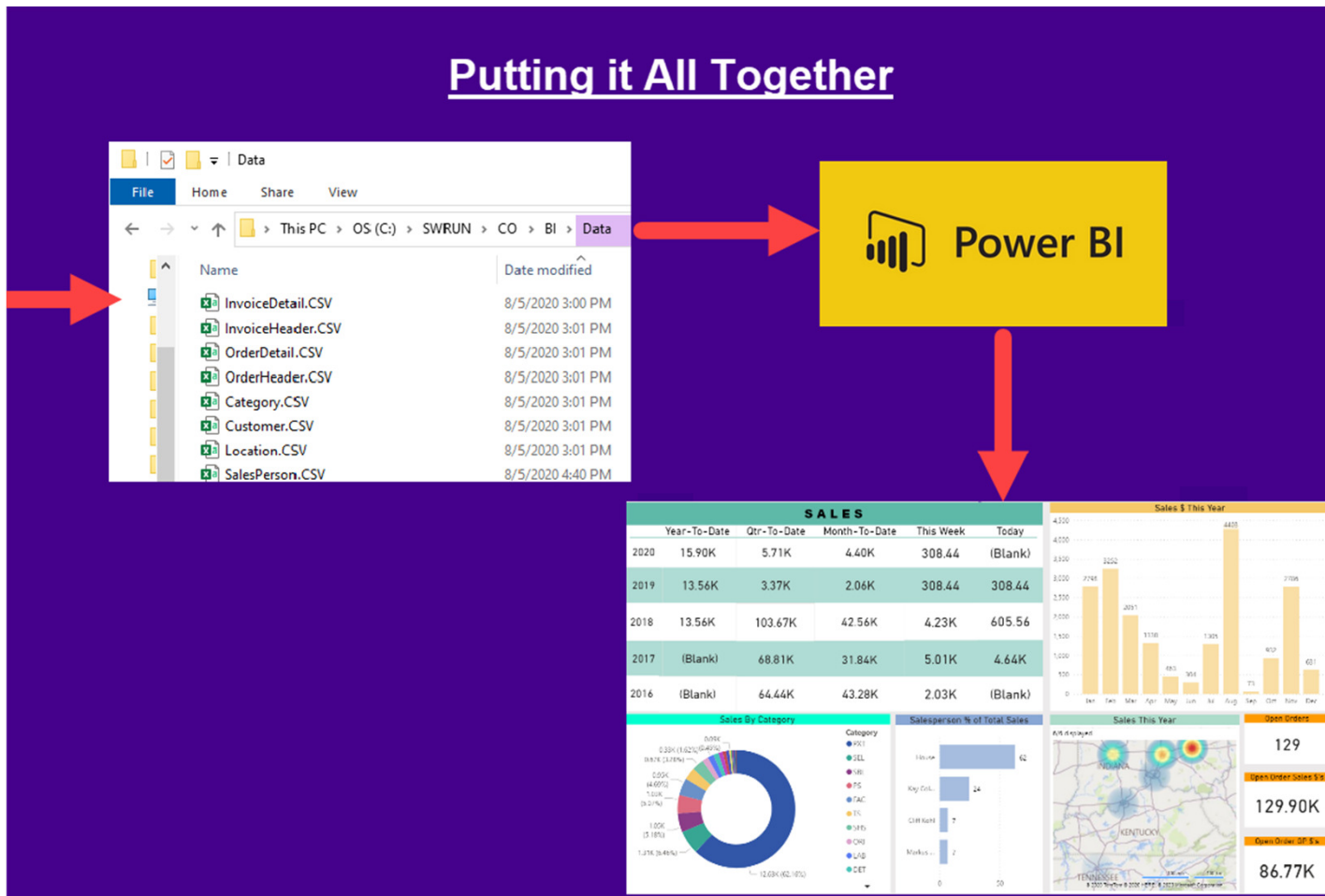
Step 2 - Build Data File for Power BI Input

5. Archive Folder	C:\SWRUN\CO\BI\Archive\
6. Current Folder	C:\SWRUN\CO\BI\Current\
7. Archive/Current File Mask	INVCD*.*
8. Output Folder	C:\SWRUN\CO\BI\Data\
9. Output File Name	InvoiceDetail.CSV
10. ReportName Name	BI-INVCD



Power BI

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