Monthly Report

TO: Robert van der Zwet DATE: July 2, 2018

CC: Sandy Wilson

from: Roberto Gargurevich

subject: Monthly Report – Customer Service Data Analyst

# **June 2018 Report**

**Routine Activities**

* Daily cash applications and review of remittance folder
* Update and maintain Dow Log and Dashboard
* Update and maintain NASA Data Projects Log
  + Added section to show projected completion date for each project in progress.

**Activities This Month**

* Dow invoicing and Dashboard procedure
  + Finished detailing procedures on how to use Dow invoicing files and Dow Dashboard
* Introduced Dow Dashboard to Customer Service and Sales teams
  + Presented the dashboard to the rest of the customer service and sales teams to provide a better idea of the things we can do with the tools we have access to and to spark creative thinking.
* Make changes requested by David W. to Dow Dashboard **(IN PROGRESS)**
  + Dashboard is being monitored daily in preparation for presentation on July 9th to executive team.
  + All sources of discrepancies between the Dow Dashboard and Great Plains have been identified and explained.
  + Worked with Christie to update and maintain the “Items Under Discussion” section
* Extract billing files from TLS database
  + Developed program to extract billing file from TLS database for any customer code.
  + Program is waiting to be audited by Rob Andren before being launched for use starting July end-of-month billing period.
  + Will be adjusting Dow invoicing files to communicate with extracted billing files to streamline the billing process one step further.
* Chassis off-hire estimate report
  + Developed chassis estimate report going back 5 years.
  + Included bar graph showing average estimate cost by age group.
* Helped Christie carryout Dow invoicing using invoicing files
  + Helped Christie implement the files by answering questions about usage.
* Hoover invoicing **(IN PROGRESS)**
  + Begun working on automation of Hoover invoicing process.
  + Project has been paused and currently waiting on confirmation of invoicing format from new Hoover contact.
* Monthly Handling and Storage reports **(IN PROGRESS)**
  + Begun formatting Handling and Storage reports to allow user to process information more easily.
  + Planning to streamline and automate process as much as possible.