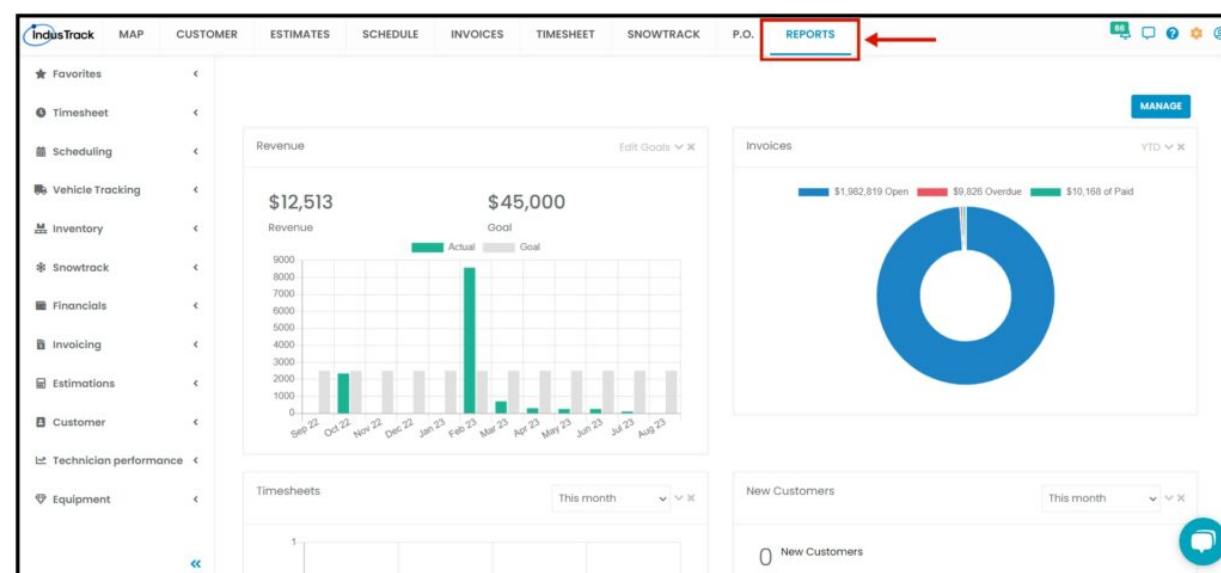


Reports Module

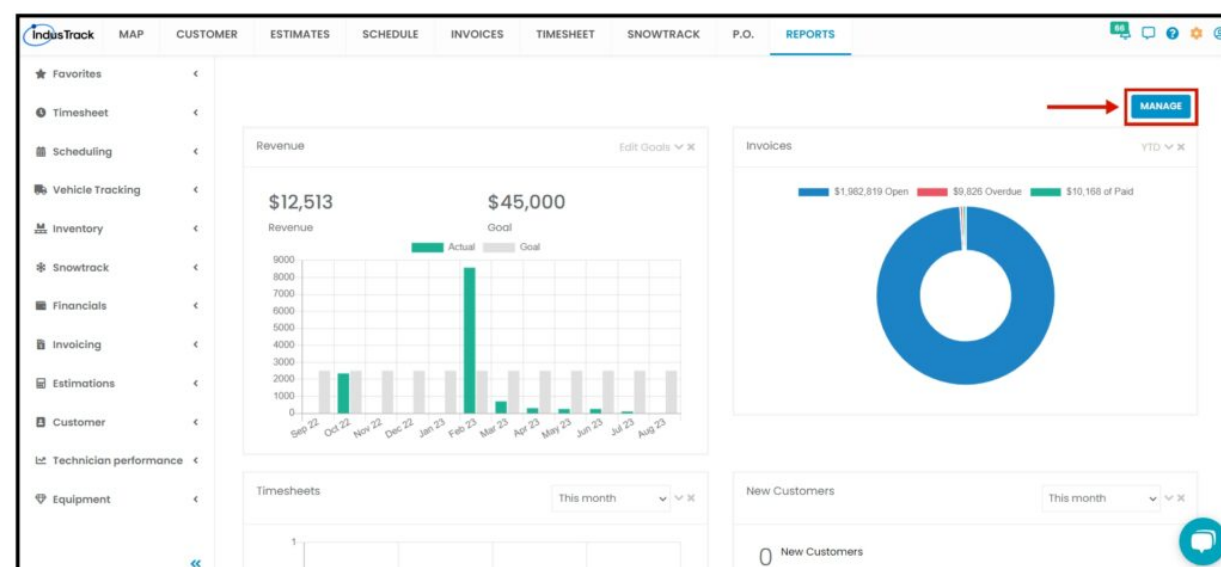
Reports will provide important detail that can be used to help develop future forecasts, marketing plans, guide budget planning, and improve decision-making. Managers also use business reports to track progress and growth and identify trends or any irregularities that may need further assessment and evaluation.

To access the **Reports Dashboard** page, select and click **Reports Module** from the top menu.



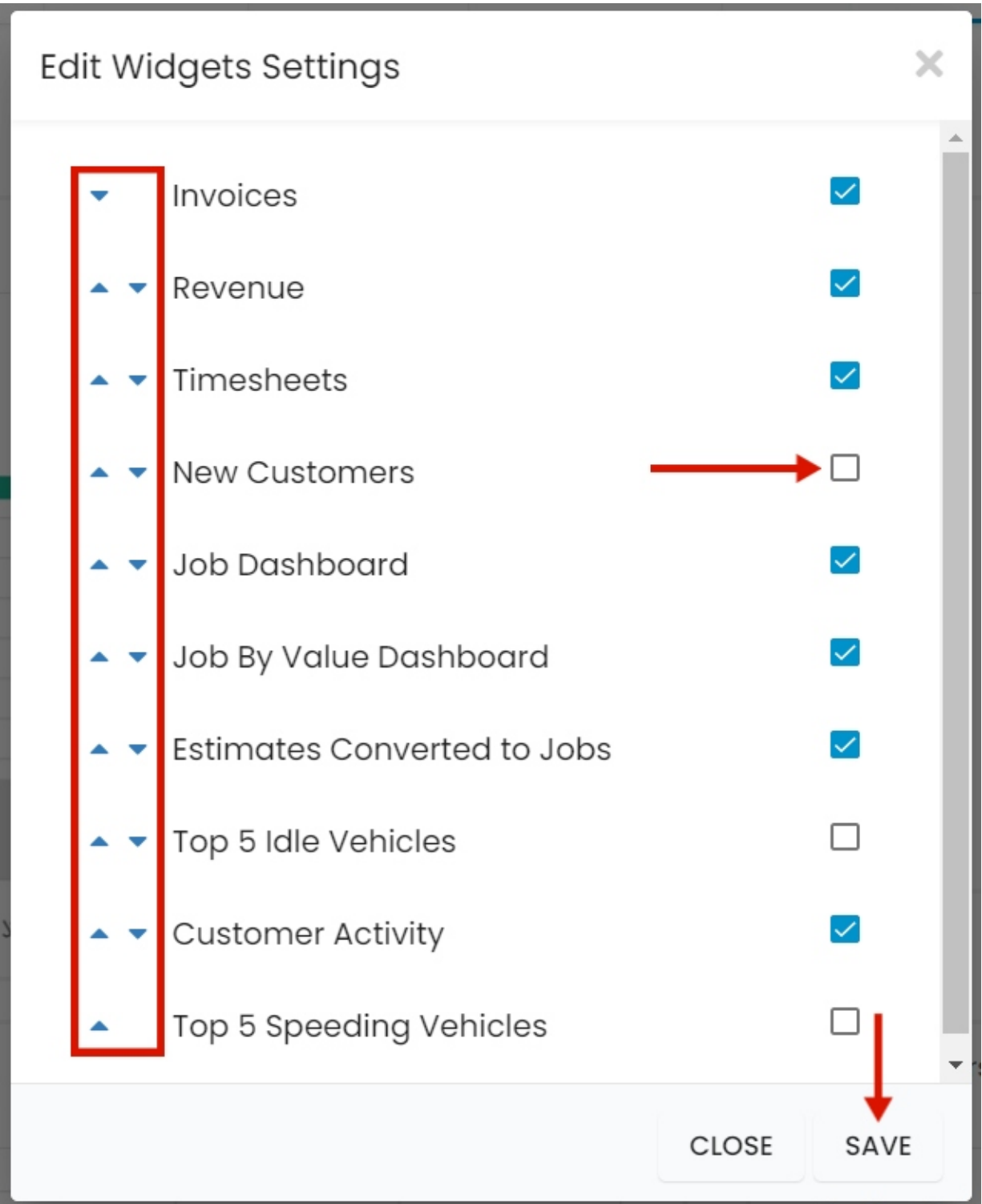
- The default page is where you can see its sub-categories found on the left-hand side after clicking on the Reports Module from the top. A summary in graphs and figures is also available on the Reports Default Page where you can easily see the running performance, status, and/or progress on a given period.
- There are ten (10) summaries of reports shown in graphs, tables, or figures in this window that will easily tell you each of its status or progress:
 - **Revenue** – the price of goods & services x number of units sold or the number of customers.
 - **Invoices** – list of services provided, with a statement of the sum due; a bill.
 - **Timesheets** – a record of the amount of a technician's time spent on each job.
 - **New Customers** – new leads or an entity that has no previous record of transaction of services.
 - **Job Dashboard** – summary of all the jobs in a given period and their total revenue.
 - **Estimates converted to Jobs** – summary of jobs won and lost.
 - **Job By Value Dashboard** – summary of all jobs' value in a given period and their statuses (Completed, Approved, and Invoiced).
 - **Top 5 Idle Vehicles** – Top 5 vehicles that have the most idle time by hours.
 - **Customer Activity** – Field Employee's activity on customers they are working on.
 - **Top 5 Speeding Vehicles** – Top 5 vehicles that have the most speed by mph.

Manage Dashboard



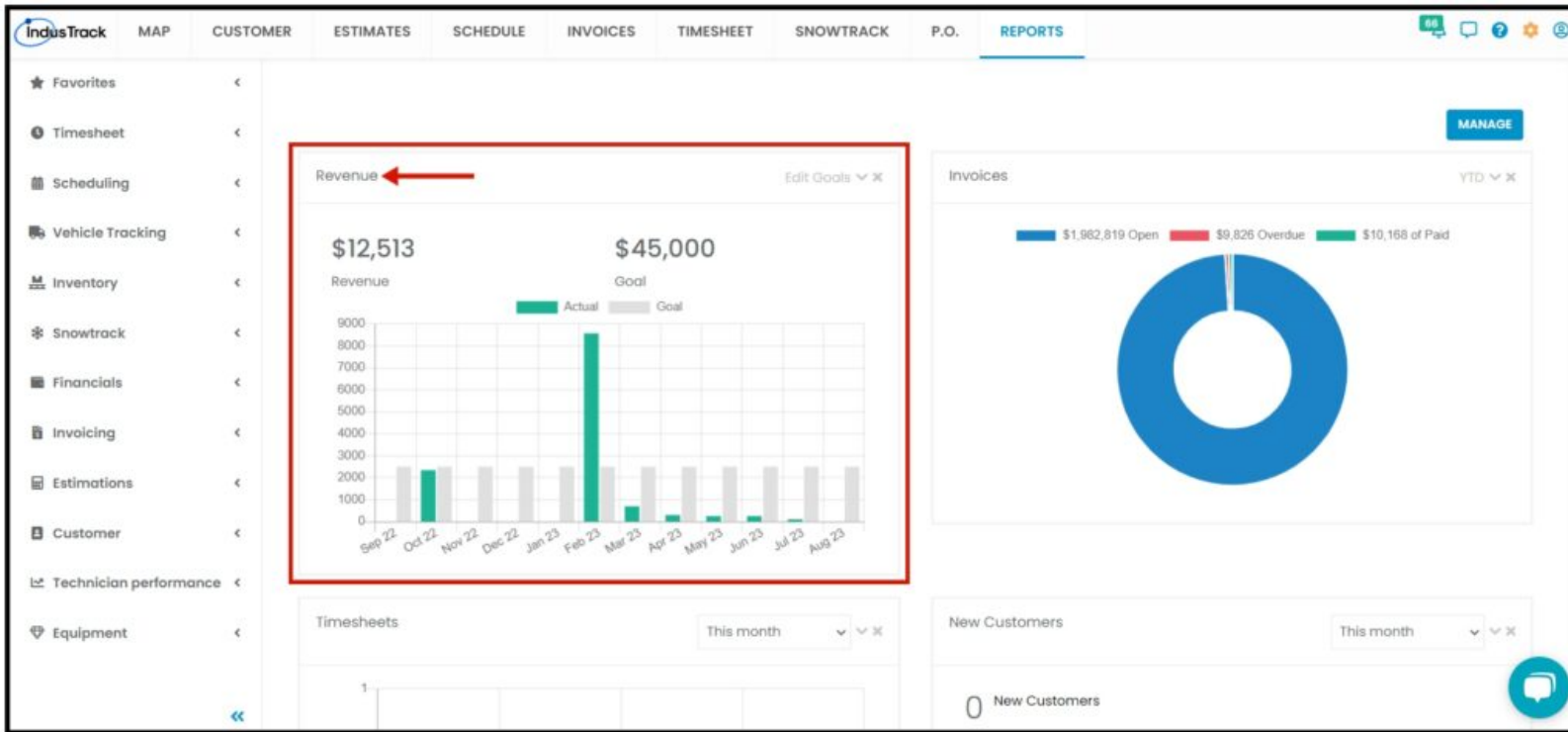
By clicking on **Manage**, you will be able to **arrange each widget in any order you want and remove them if you don't need to see them**.

- Click on the Arrow Up and Down from the left-hand side to arrange them in the order of your liking.
- Remove widgets from the dashboard by unchecking the box from the right-hand side.
- Click on Save to apply the changes

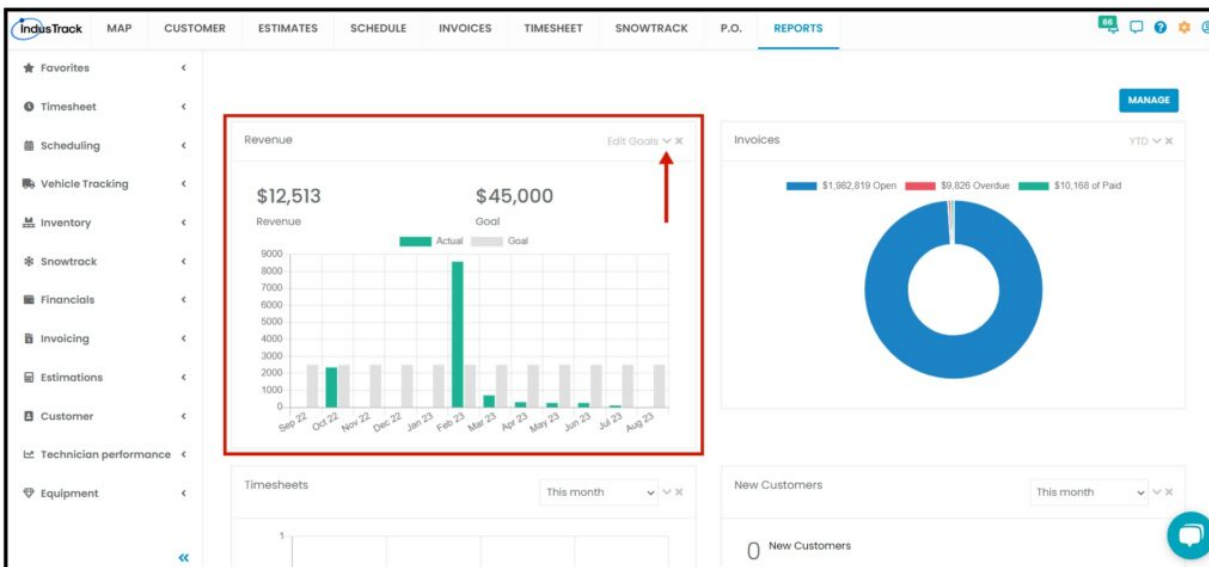


Let us look at each of these reports.

Revenue Report



- In this report, you can find a graph of your set goal for your revenue making it easier for you to see if you are hitting your set goal on a monthly basis.
- If you wish to edit the set goal at any given time to check how far you are from your goal, you can actually do so. Click on **Edit Goals**.



- Click **Edit Goals**
- Set **Monthly Revenue Goal** in the Field Box
- Set **Annual Revenue Goal** in the Field Box
- Set the **Financial Year Start**
 - Typically, the Financial year starts every 1st of January
- Click **Save**

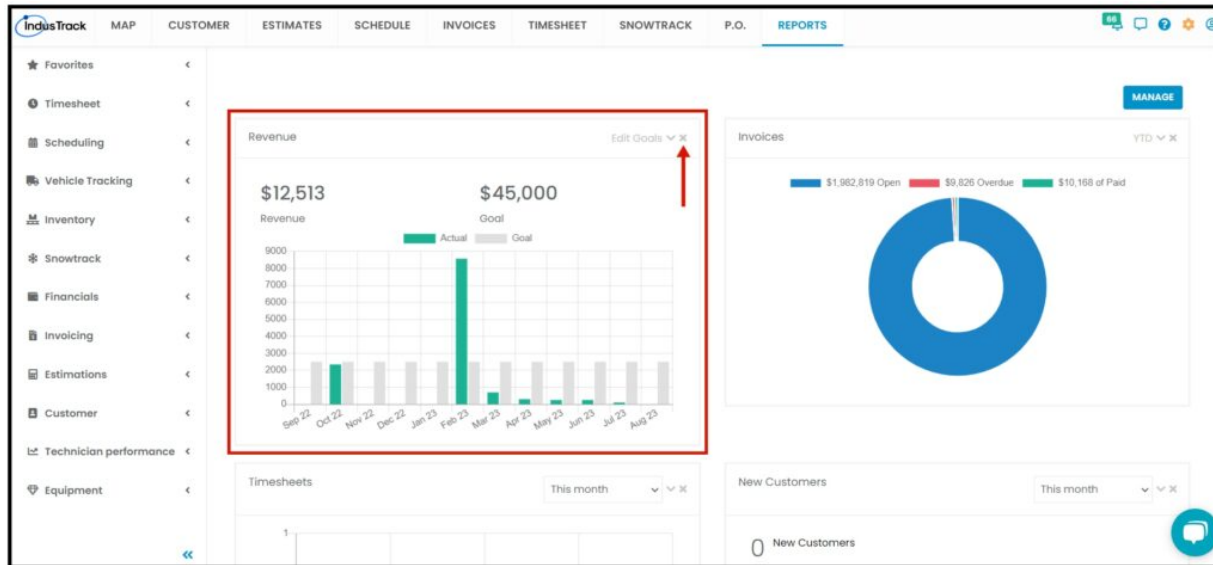
Edit Revenue Goal

Monthly Revenue Goal *

Annual Revenue Goal *

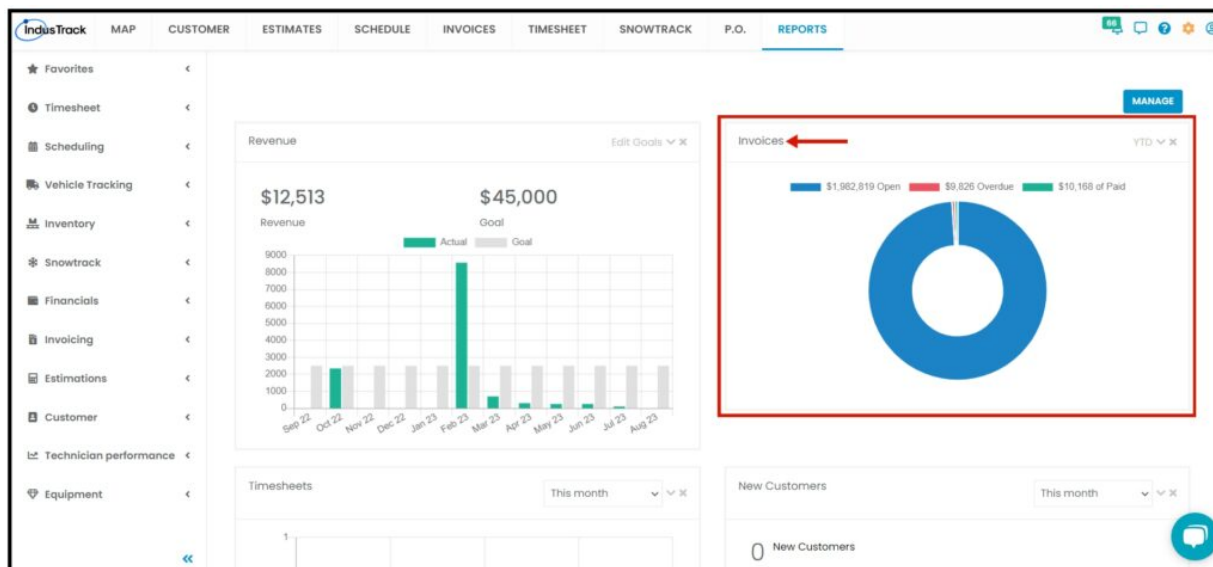
Financial Year Start *

Click on the **X** Icon to remove the widget from the Dashboard.

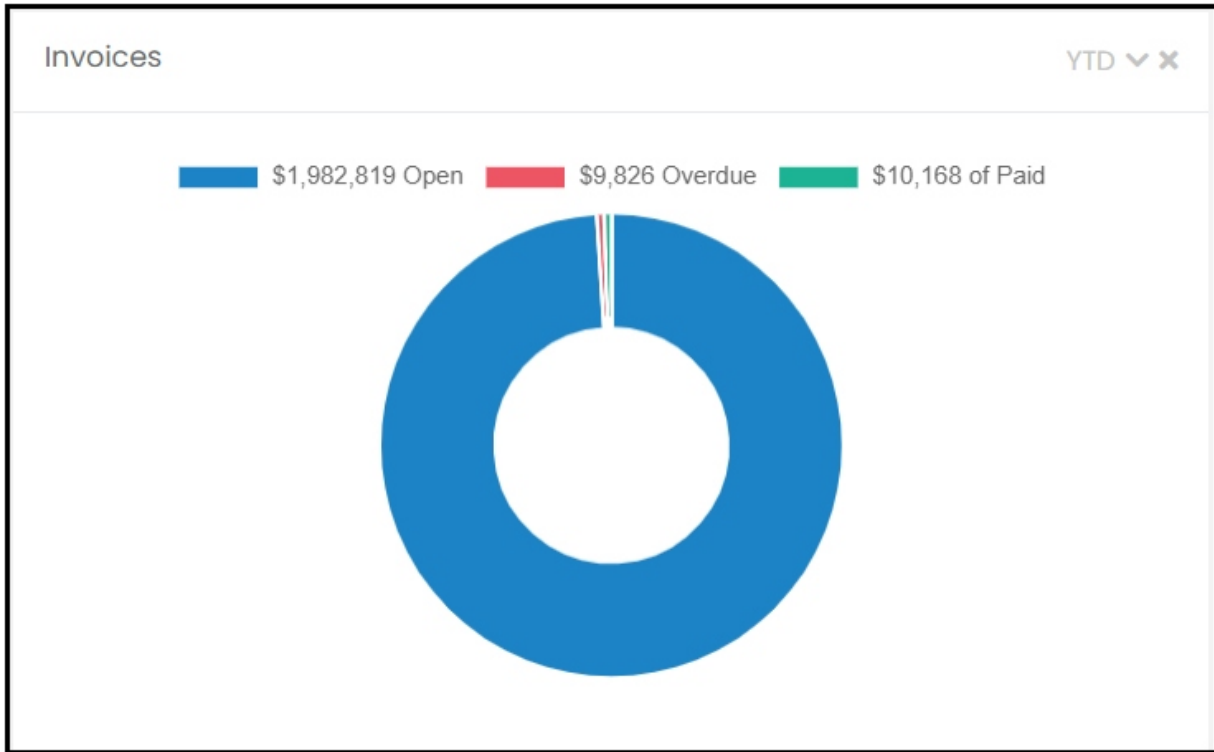


Invoice Report

In this report, you can find your year-to-date open invoices, overdue invoices, and Paid Invoices.



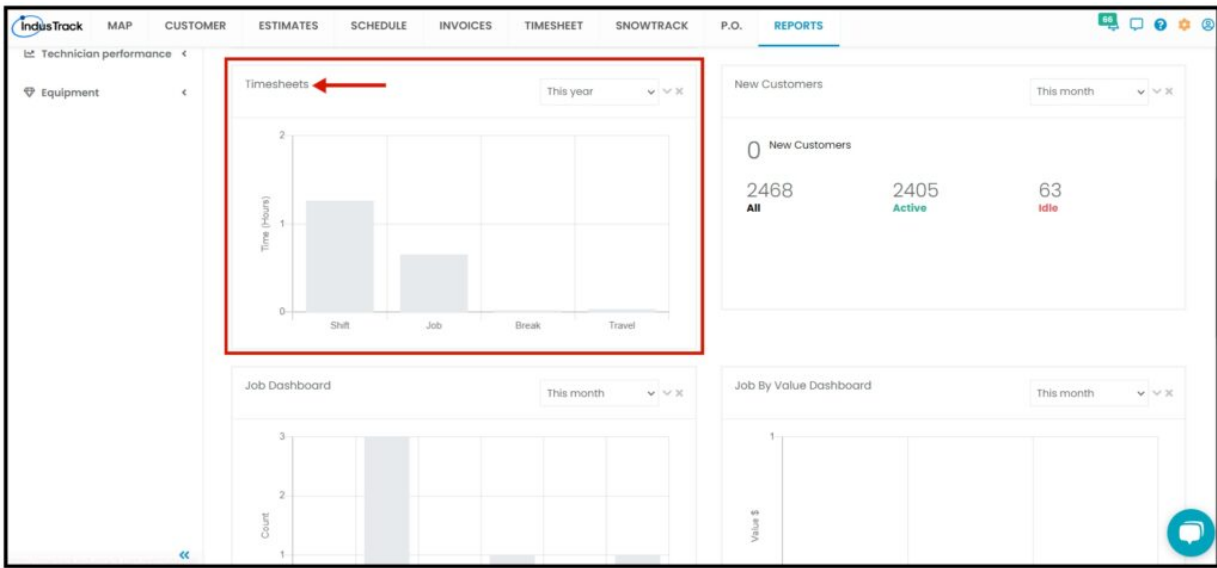
- **Open Invoices** – invoices to clients that have pending payment.
- **Overdue Invoices** – invoices that are already beyond the due date and are pending payment.
- **Paid Invoices** – invoices that have already been paid.



Timesheet Report

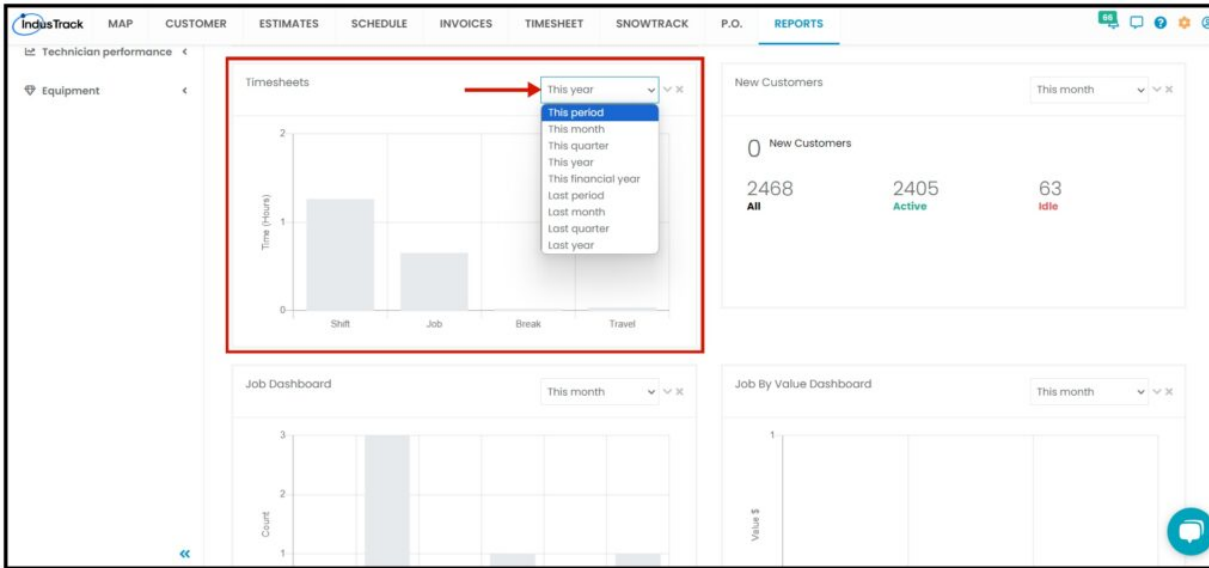
In this report you can find the Time or Hours spent for each of the following:

- Shift
- Job
- Break
- Travel



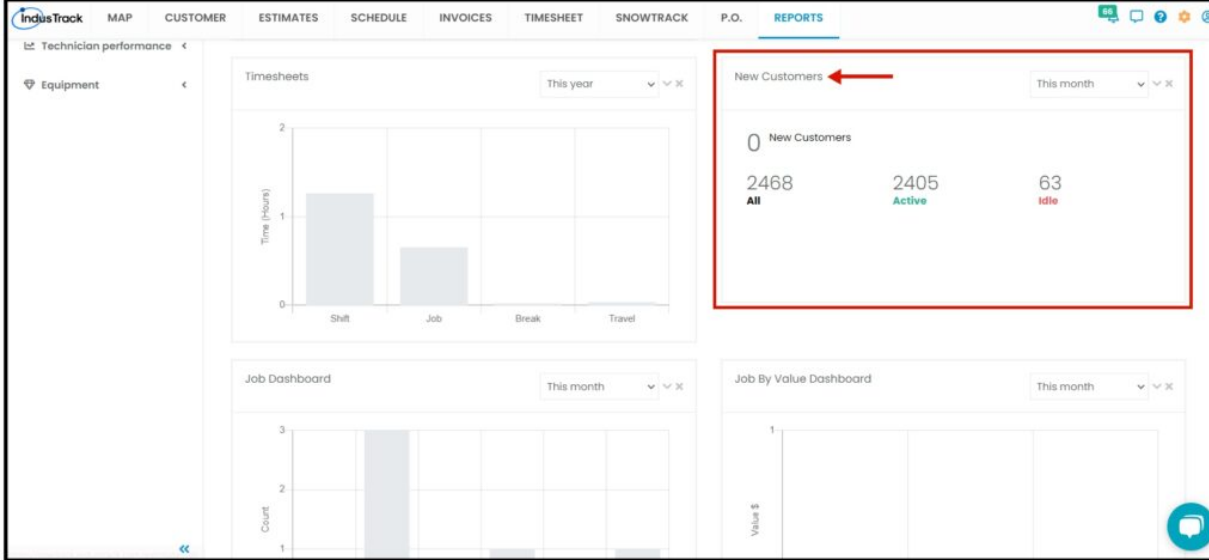
You can also select the period you want to view Timesheet Report as a summary; click on the drop-down arrow and select the period. Graph data will vary depending on the period you will select.

- This period
- This month
- This quarter
- This year
- This financial year
- Last period
- Last month
- Last quarter
- Last year



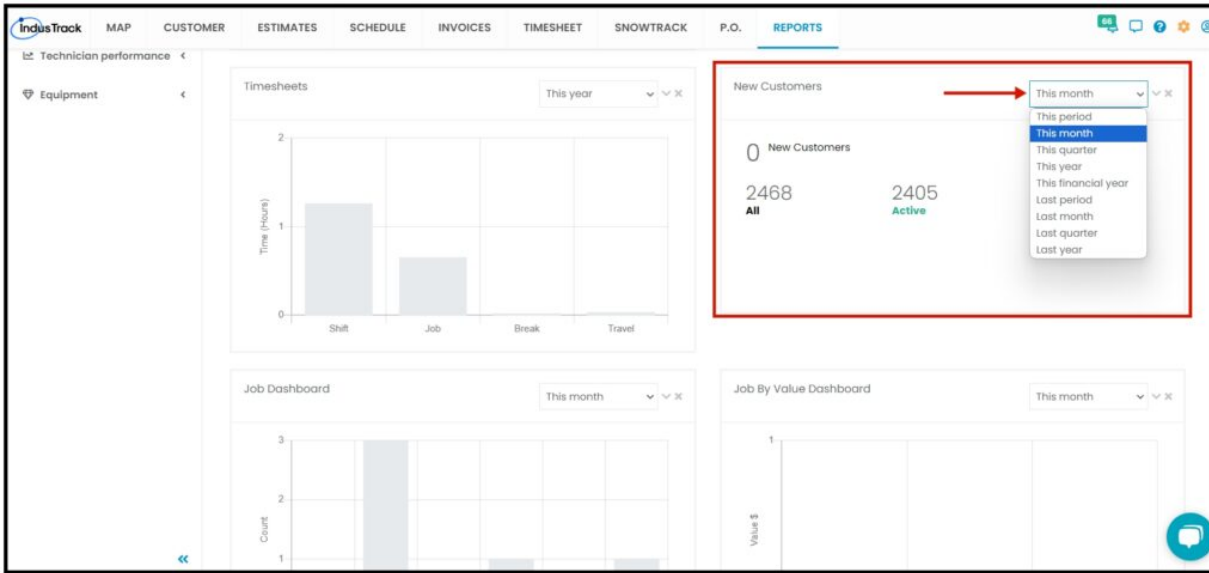
New Customers

In this report, you can find the Total Number of customers in a given period, Total Active Customers, and Total Idle



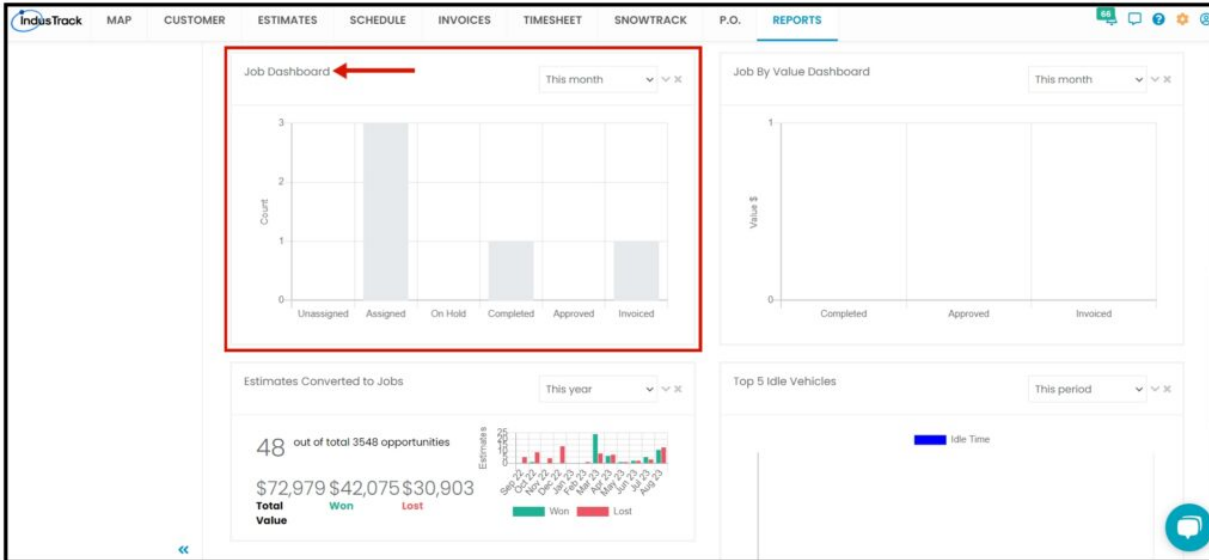
You can also select the period you want to view New Customers Report as a summary; click on the drop-down arrow and select the period.

- This period
- This month
- This quarter
- This year
- This financial year
- Last period
- Last month
- Last quarter
- Last year



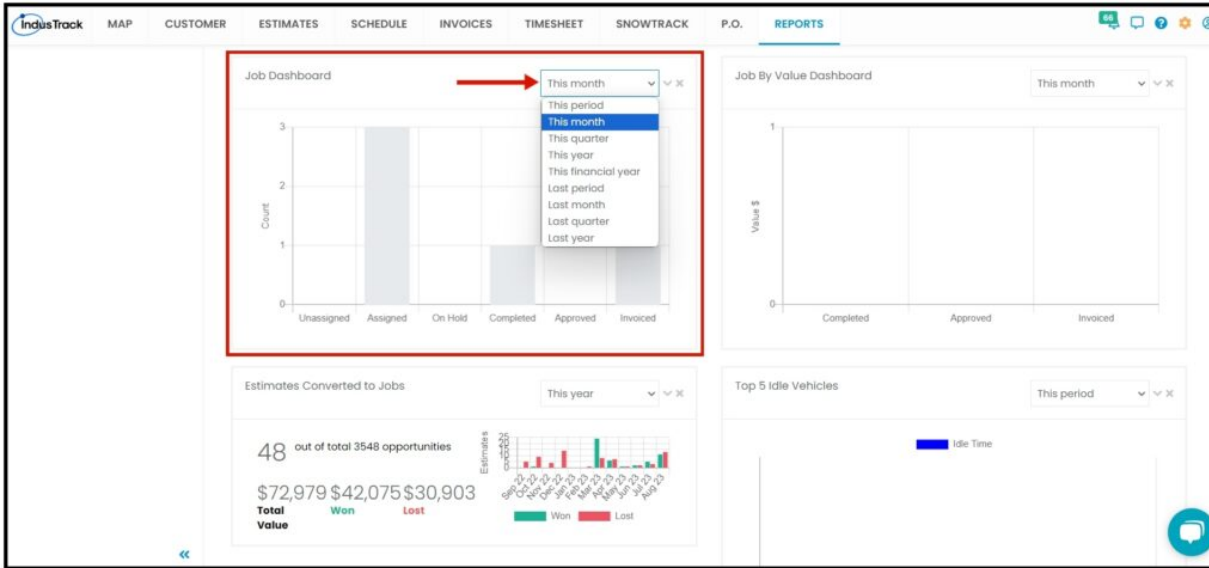
Job Dashboard Report

In this report, you can find the total number of jobs, total repeating jobs, and their total revenue in a given period.



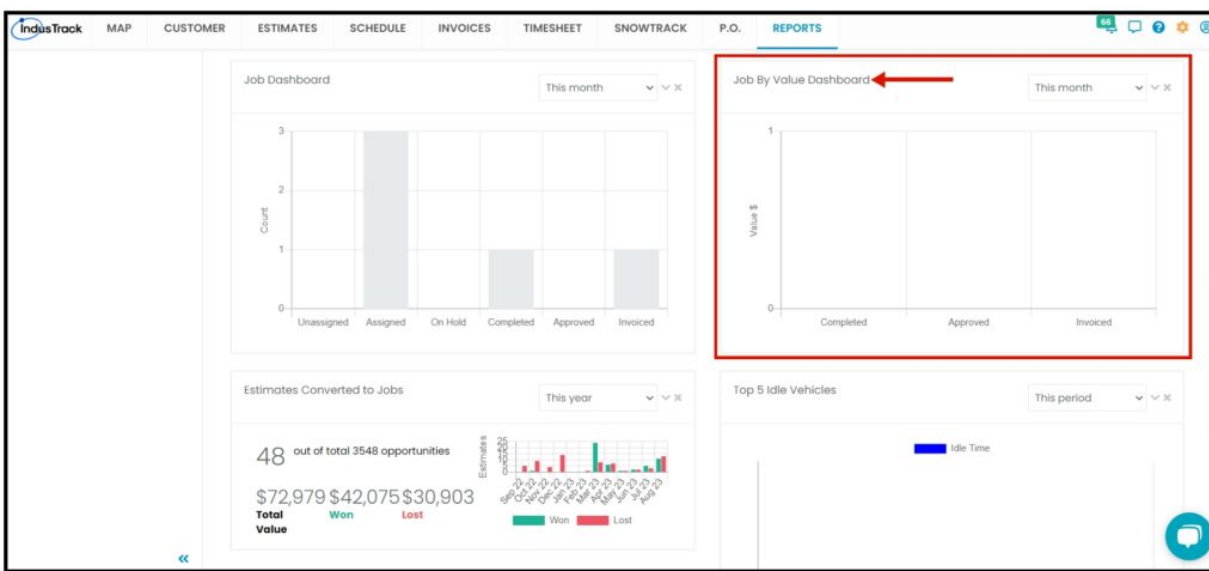
You can also select the period you want to view Job Dashboard Report as a summary; click on the drop-down arrow and select the period.

- This period
- This month
- This quarter
- This year
- This financial year
- Last period
- Last month
- Last quarter
- Last year



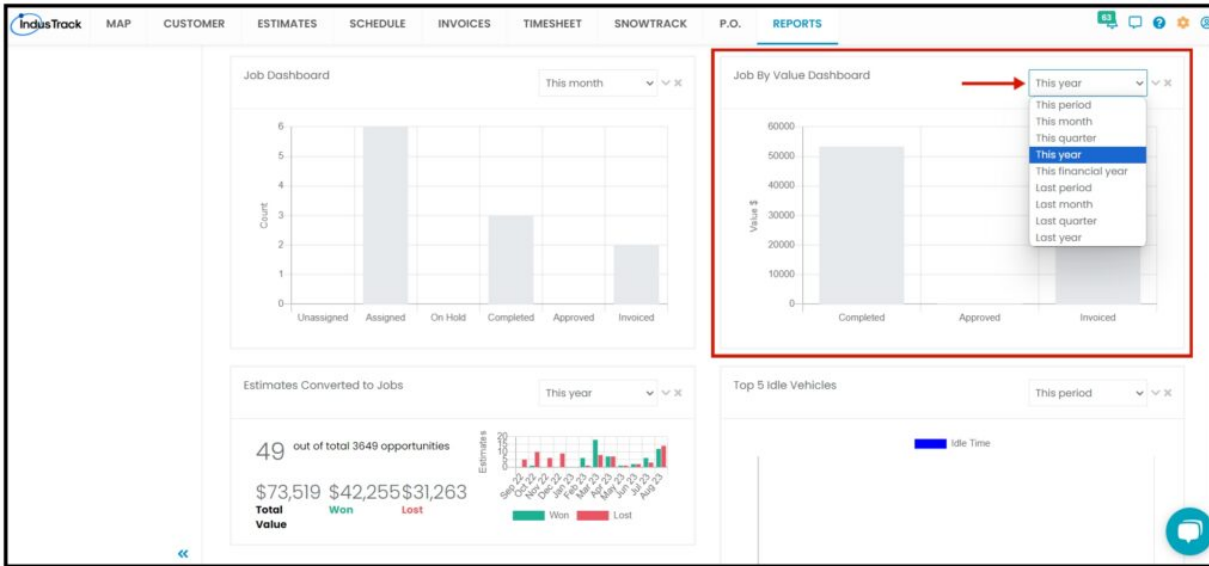
Job By Value Dashboard

In this report, you can find the total number of completed jobs, approved jobs, and invoiced jobs and their total value in a given period.



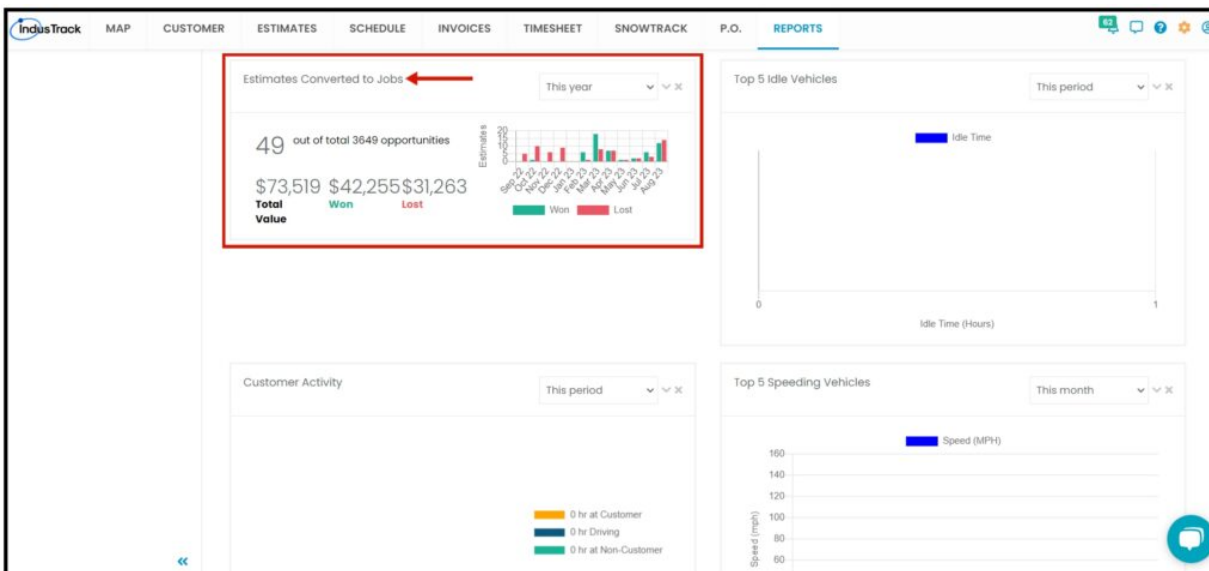
You can also select the period you want to view the Jobs By Value Dashboard as a summary; click on the drop-down arrow and select the period.

- This period
- This month
- This quarter
- This year
- This financial year
- Last period
- Last month
- Last quarter
- Last year



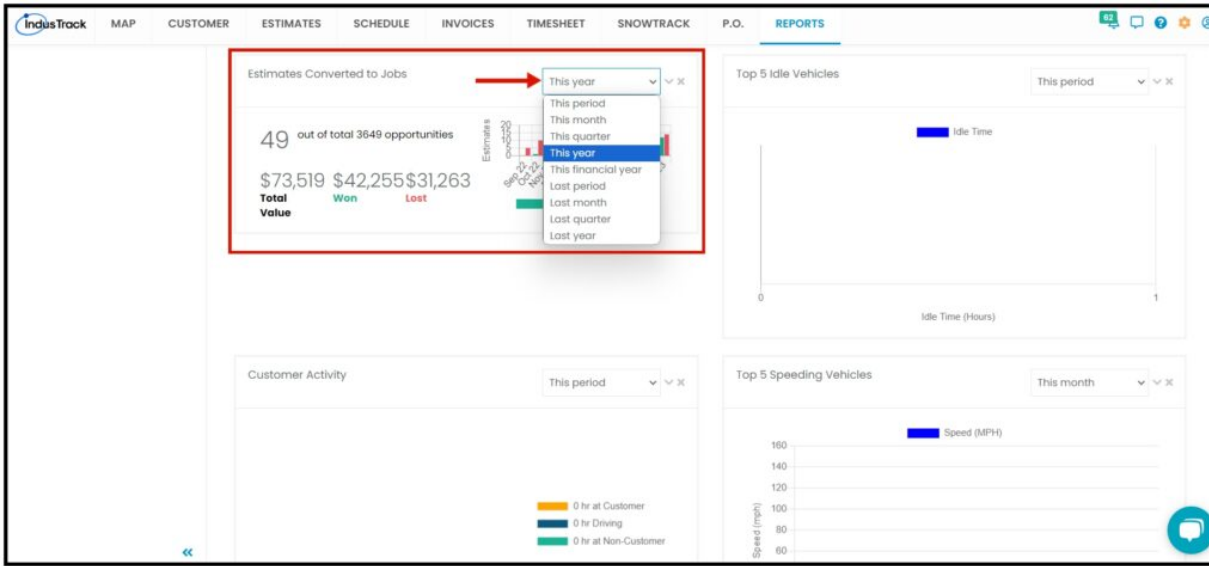
Estimates Converted to Jobs Report

In this report, you can find the total number of estimates you won and lost and how much in a given period.



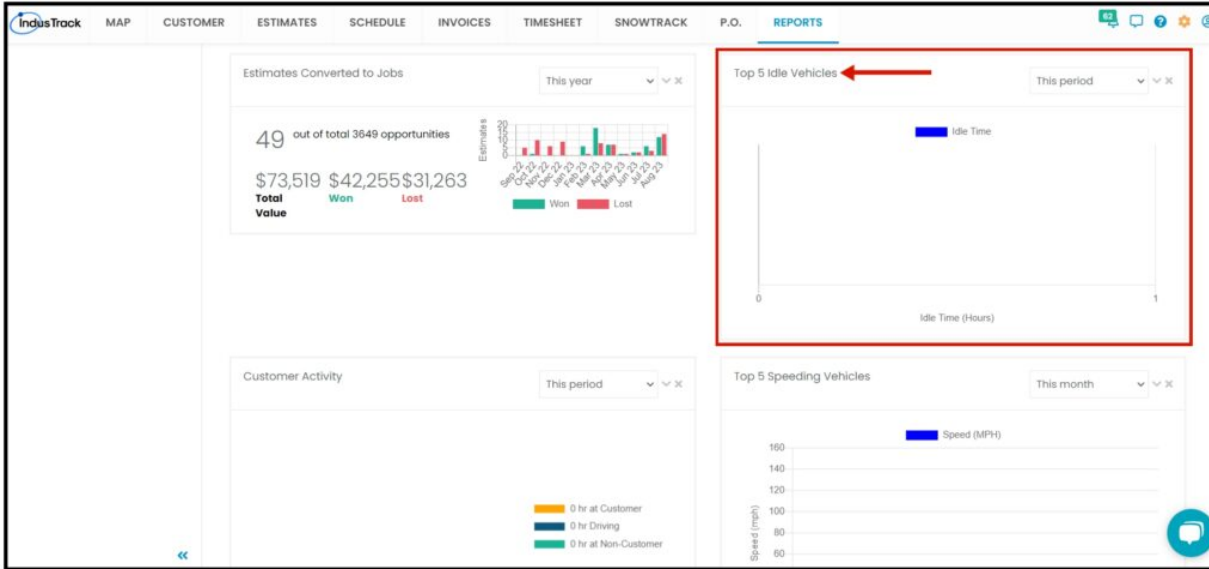
You can also select the period you want to view Estimates Converted to Jobs Report as a summary; click on the drop-down arrow and select the period.

- This period
- This month
- This quarter
- This year
- This financial year
- Last period
- Last month
- Last quarter
- Last year



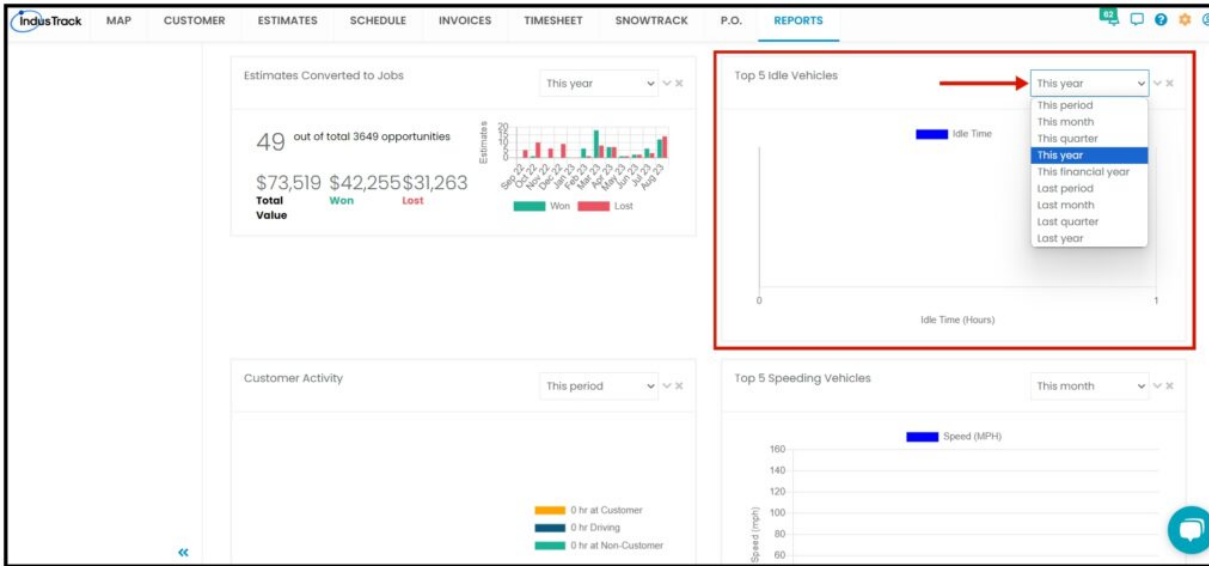
Top 5 Idle Vehicles Report

In this report, you can find the Top 5 vehicles that have the most idle time by hours in a given period.



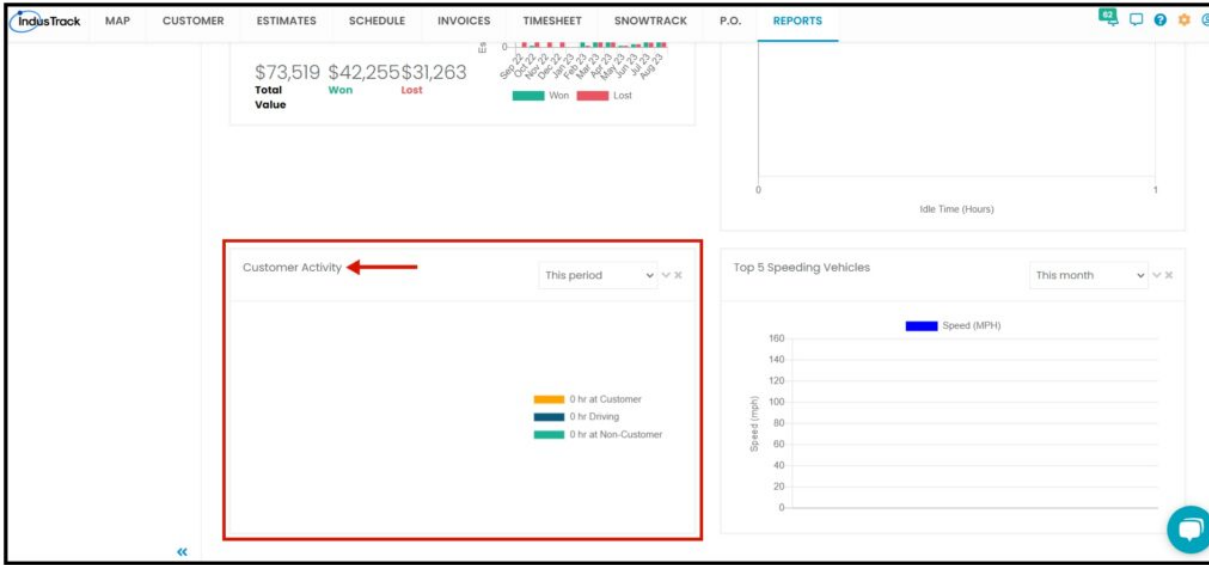
You can also select the period you want to view Top 5 Idle Vehicles as a summary; click on the drop-down arrow and select the period.

- This period
- This month
- This quarter
- This year
- This financial year
- Last period
- Last month
- Last quarter
- Last year



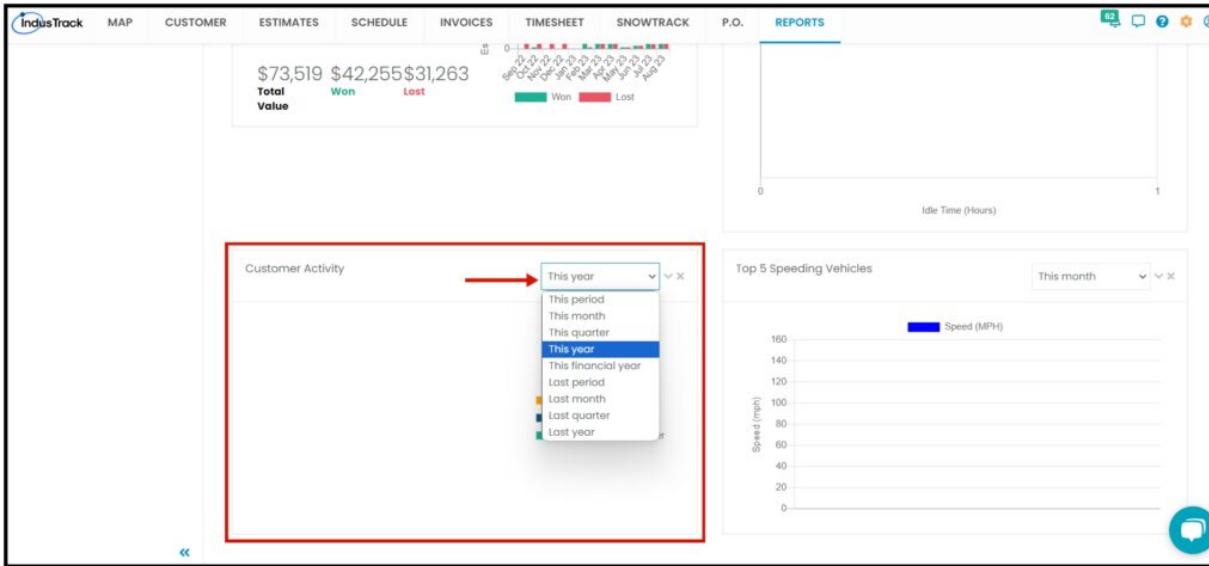
Customer Activity Report

In this report, you can find Field Employee’s activity on customers they are working on in a given period.



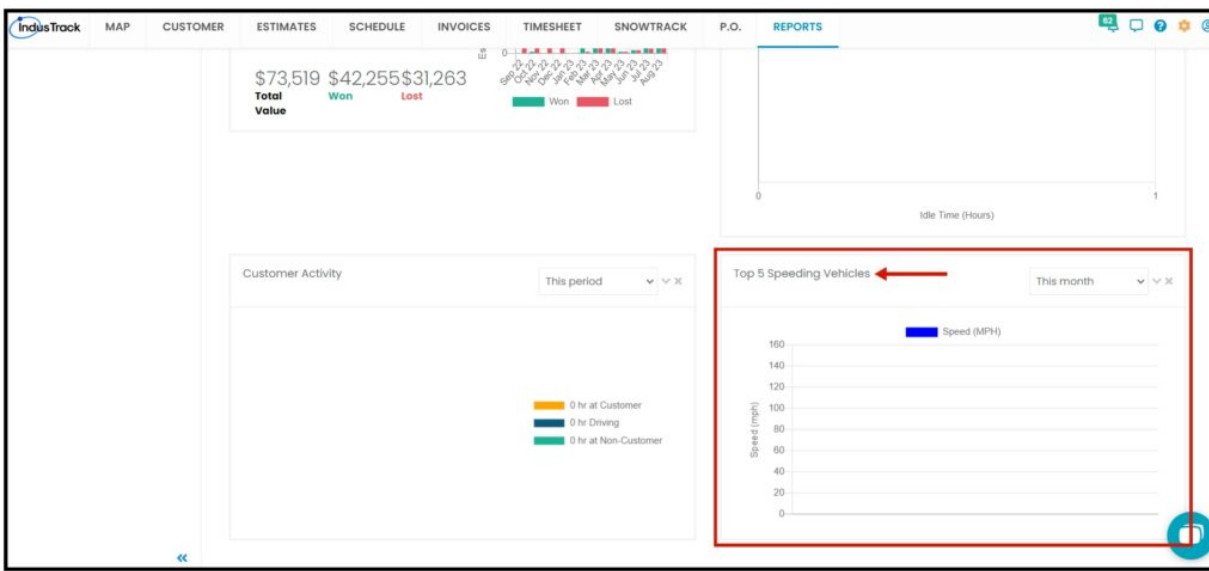
You can also select the period you want to view Top 5 Idle Vehicles as a summary; click on the drop-down arrow and select the period.

- This period
- This month
- This quarter
- This year
- This financial year
- Last period
- Last month
- Last quarter
- Last year



Top 5 Speeding Vehicles

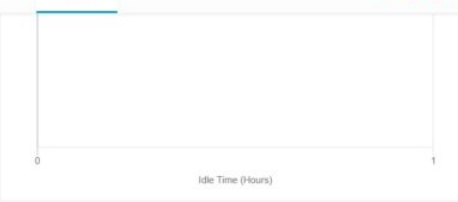
In this report, you can find the Top 5 vehicles that have the most speed by mph in a given period.



You can also select the period you want to view Top 5 Speeding Vehicles as a summary; click on the drop-down arrow and select the period.

- This period
- This month
- This quarter
- This year
- This financial year
- Last period
- Last month
- Last quarter
- Last year

Total Value \$73,519 Won \$42,255 Lost \$31,263



Customer Activity This year 0 hr at Customer 0 hr Driving 0 hr at Non-Customer

Top 5 Speeding Vehicles Speed (MPH) This year This period This month This quarter This year This financial year Last period Last month Last quarter Last year

