

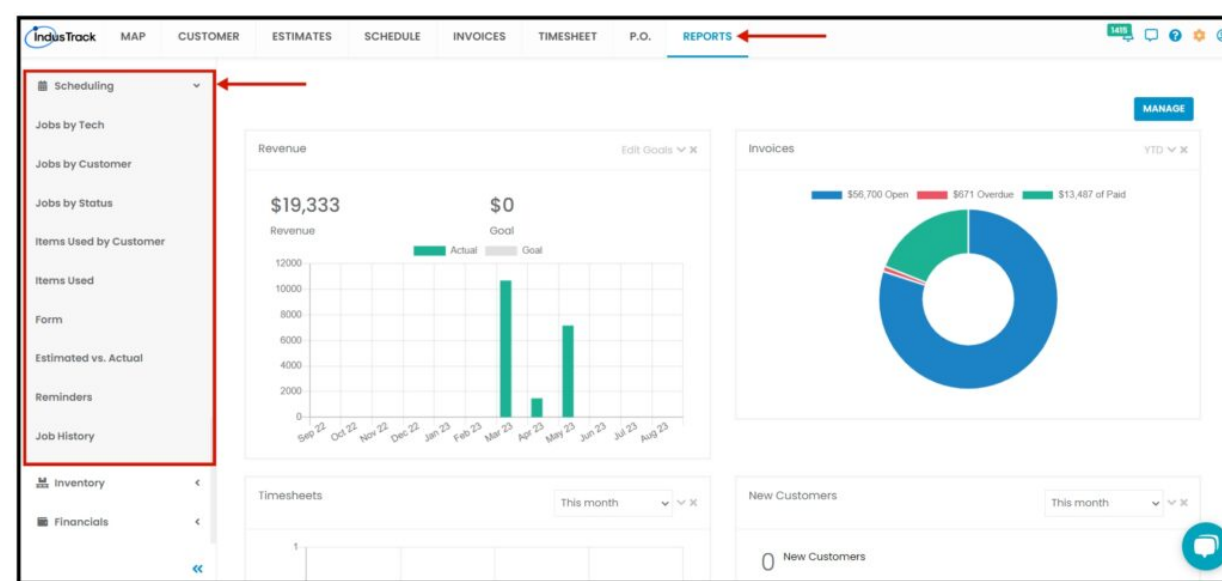
Scheduling Report

Scheduling is the process of arranging, controlling, and optimizing work and workloads. Scheduling is used to allocate service resources, plan job schedules, plan service processes, and purchase materials.

To access Scheduling Report, click on the **Reports Module** from the top dashboard> on the left panel, and click **Scheduling**.

When you click on the drop-down arrow beside Scheduling, it will show its subcategories for the reports that are available:

- Jobs by Tech
- Jobs by Customer
- Jobs by Status
- Items Used by Customer
- Items Used
- Form
- Estimated vs. Actual
- Reminders
- Job History

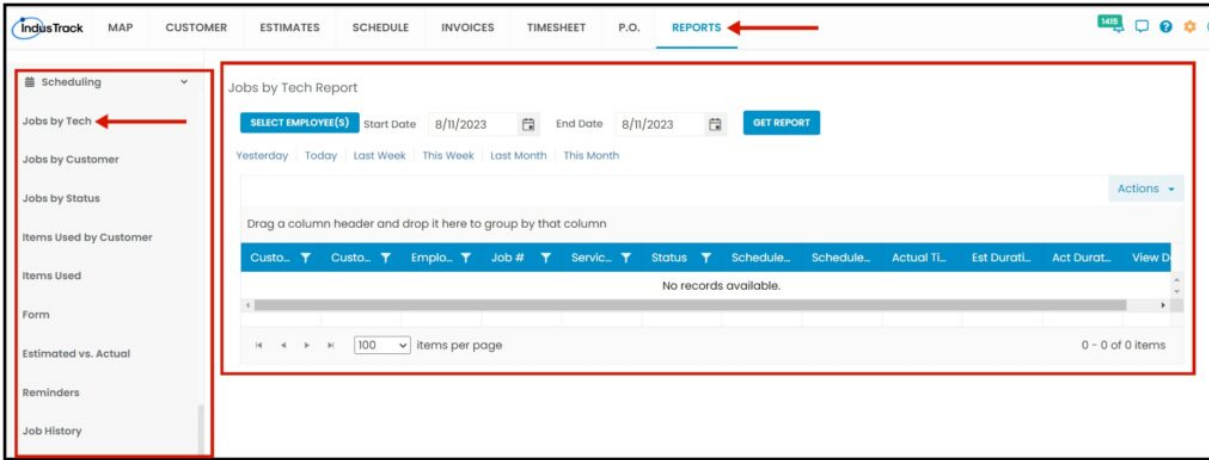


Jobs by Tech Report

In this report, you can find a detailed report of all the jobs that were assigned or worked by field employees. These are all the details you will be able to find in this Report:

1. Customer Name
2. Customer Location
3. Employee Name
4. Job Number
5. Service Type
6. Status
 - In the **status**, you will be able to determine if the Job has been started, declined, or completed.
7. Schedule Date
 - The actual date the job was scheduled.
8. Schedule Time
 - The actual time the job is scheduled.
9. Actual Time
 - The actual time the field employee started the job.
10. Estimated Duration
 - The preconfigured duration of how long the job is estimated to be performed.
11. Actual Duration
 - The actual duration the field employee has finished the job.
12. View Detail
 - View the Job Detail Report Preview

To view the **Jobs by Tech Report**, go to **Reports** Menu on the top> Click **Scheduling**> on the drop-down click **Jobs by Tech Report**.

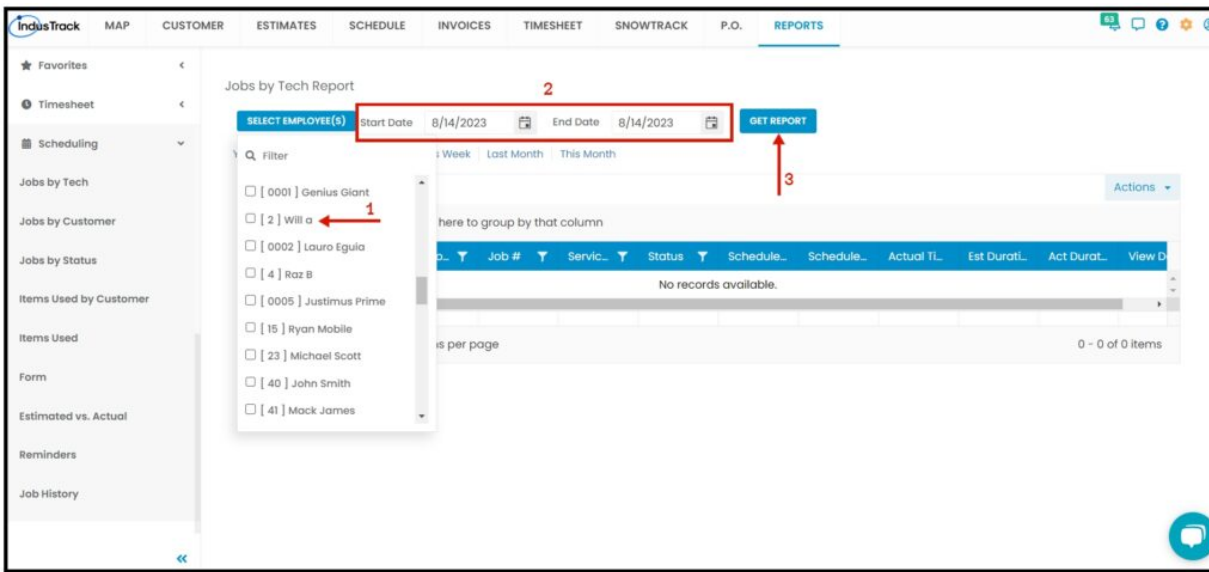


Generate Job by Tech Report

On the Job Report page, you can generate your Field Employees' Job Reports. Once the Report is generated you will be able to see all the Jobs that were assigned or worked by the selected field employee with all details mentioned above.

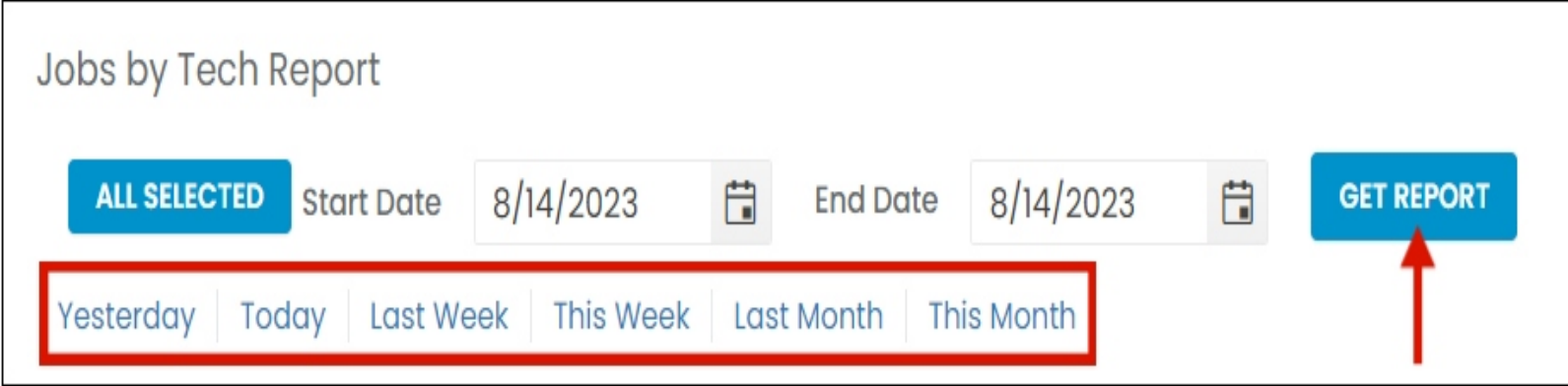
To generate a job report:

1. On the Job report page, select which **field employees'** job reports you would like to view.
 - o You can filter field employees by the search bar, on the drop-down, by groups, or select all employees.
2. **Select a Start Date and End Date**– By filtering out the start and end dates, **you are filtering out the Schedule date of a Job** assigned/worked by the selected field employee.
3. After filtering out field employee/s and the Start/End date, click on **Get Report**.



Alternatively, you can also select a period rather than selecting a specific date. Click on the desired specific period, then click Get Report.

Yesterday | Today | Last Week | This Week | Last Month | This Month



After we were able to generate jobs by tech report, you should be able to see all jobs assigned to the employee we filtered out with all of their details.

Jobs by Tech Report

ALL SELECTED Start Date 7/1/2023 End Date 7/31/2023 GET REPORT

Yesterday Today Last Week This Week Last Month This Month

Drag a column header and drop it here to group by that column

Custom...	Custom...	Employ...	Job #	Service...	Status	Schedule D...	Schedule TL...	Actual Time	Est Duration	Act Duration	View Details
2.wheels club	71 A Lopez St Cebu PH 39746	[878] Chris m	2632		Complete	07/31/2023	04:02 PM		01:00		View
2.wheels club	71 A Lopez St Cebu PH 39746	[1998] Jorji Wills	2624		Invoiced	07/28/2023	12:00 PM	08:45 AM	01:00	00:09:00	View
2.wheels club	71 A Lopez St Cebu PH 39746	[1998] Jorji Wills, [2001] Sono Asif	2621		Complete	07/27/2023	12:00 PM	11:02 AM	01:00	00:14:00	View
2.wheels club	71 A Lopez St Cebu PH 39746	[2] Will a	2619		Not Started	07/27/2023	06:46 AM		01:00		View
	71 A Lopez St										

1 - 43 of 43 items

After we click on Get Report, we can now export the **Jobs by Tech Report** into **Excel or PDF format** by clicking on the **Actions Button**.

Actions Button

- Export to PDF
- Export to Excel
- Configure Report Columns
- Schedule Report
- Add to Favorites

Jobs by Tech Report

ALL SELECTED Start Date 7/1/2023 End Date 7/31/2023 GET REPORT

Yesterday Today Last Week This Week Last Month This Month

Drag a column header and drop it here to group by that column

Custom...	Custom...	Employ...	Job #	Service...	Status	Schedule D...	Schedule TL...	Actual Time	Est Duration	Act Duration	View Details
2.wheels club	71 A Lopez St Cebu PH 39746	[878] Chris m	2632		Complete	07/31/2023	04:02 PM		01:00		View
2.wheels club	71 A Lopez St Cebu PH 39746	[1998] Jorji Wills	2624		Invoiced	07/28/2023	12:00 PM	08:45 AM	01:00	00:09:00	View
2.wheels club	71 A Lopez St Cebu PH 39746	[1998] Jorji Wills, [2001] Sono Asif	2621		Complete	07/27/2023	12:00 PM	11:02 AM	01:00	00:14:00	View
2.wheels club	71 A Lopez St Cebu PH 39746	[2] Will a	2619		Not Started	07/27/2023	06:46 AM		01:00		View
	71 A Lopez St										

1 - 43 of 43 items

Actions

- Export to PDF
- Export to Excel
- Configure Report Columns
- Schedule Report
- Add to Favorites

Export Report

- Click on **export to Excel** or **export to PDF** to download the report to your computer. Either way, you can completely see the details in the report.

Jobs by Tech Report

Start Date: 7/1/2023 End Date: 7/31/2023 GET REPORT

Yesterday Today Last Week This Week Last Month This Month

Drag a column header and drop it here to group by that column

Custom...	Custom...	Employ...	Job #	Service ...	Status	Schedule D...	Schedule TL...	Actual Time	Est Duration	A
2_wheels club	71 A Lopez St Cebu PH 39746	[878] Chris m	2632		Complete	07/31/2023	04:02 PM		01:00	
2_wheels club	71 A Lopez St Cebu PH 39746	[1998] Jorji Wills	2624		Invoiced	07/28/2023	12:00 PM	08:45 AM	01:00	00:
2_wheels club	71 A Lopez St Cebu PH 39746	[1998] Jorji Wills, [2001] Sono Asif	2621		Complete	07/27/2023	12:00 PM	11:02 AM	01:00	00:14:00 View
2_wheels club	71 A Lopez St Cebu PH 39746	[2] Will a	2619		Not Started	07/27/2023	06:46 AM		01:00	View
	71 A Lopez St									

1 - 43 of 43 Items

Configure Report Columns

Enable or disable the columns on this report if you want to see them or not. When disabling the column/s, once you generate this report that specific column will be removed.

Jobs by Tech Report

Start Date: 7/1/2023 End Date: 7/31/2023 GET REPORT

Yesterday Today Last Week This Week Last Month This Month

Drag a column header and drop it here to group by that column

Custom...	Custom...	Employ...	Job #	Service ...	Status	Schedule D...	Schedule TL...	Actual Time	Est Duration	A
2_wheels club	71 A Lopez St Cebu PH 39746	[878] Chris m	2632		Complete	07/31/2023	04:02 PM		01:00	
2_wheels club	71 A Lopez St Cebu PH 39746	[1998] Jorji Wills	2624		Invoiced	07/28/2023	12:00 PM	08:45 AM	01:00	00:
2_wheels club	71 A Lopez St Cebu PH 39746	[1998] Jorji Wills, [2001] Sono Asif	2621		Complete	07/27/2023	12:00 PM	11:02 AM	01:00	00:14:00 View
2_wheels club	71 A Lopez St Cebu PH 39746	[2] Will a	2619		Not Started	07/27/2023	06:46 AM		01:00	View
	71 A Lopez St									

1 - 43 of 43 Items

Uncheck columns you don't see in the Report. Click SAVE after configuring.

Edit Columns Settings



- Customer Name
- Customer Location
- Employee Name
- Job #
- Service Type
- Status
- Schedule Date
- Schedule Time
- Actual Time
- Est Duration
- Act Duration
- View Details

CLOSE

SAVE

Schedule Report

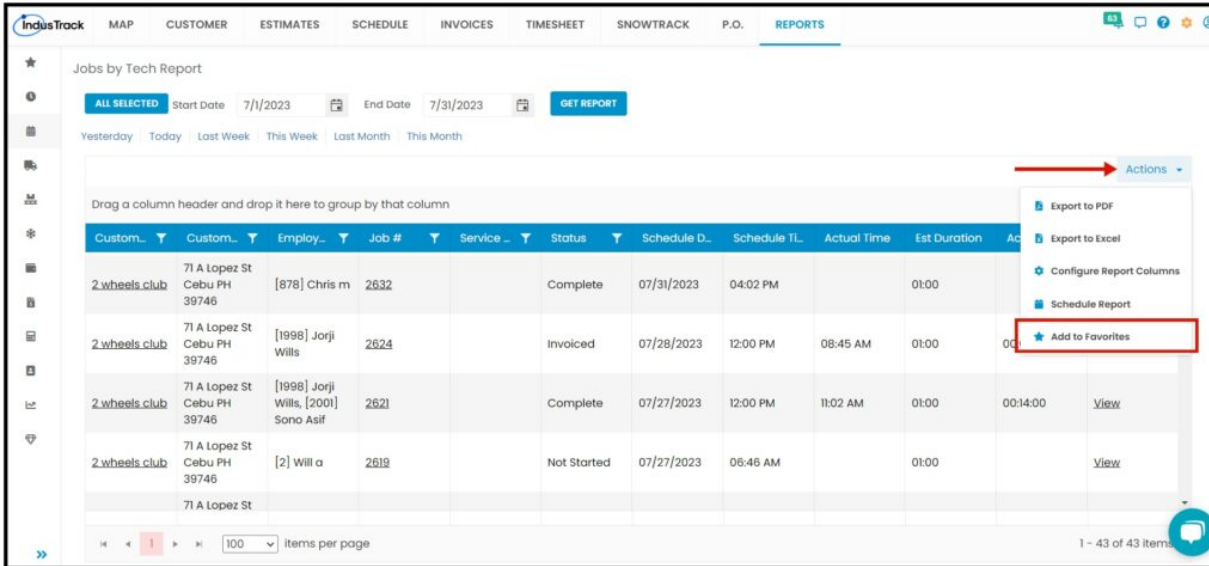
You can also Automatically schedule a report on a specified frequency. Refer to Schedule Report Module.

The screenshot shows the 'Reports' module in IndusTrack. The main heading is 'Jobs by Tech Report'. Below it, there are filters for 'ALL SELECTED', 'Start Date' (7/1/2023), and 'End Date' (7/31/2023), along with a 'GET REPORT' button. A navigation bar includes 'Yesterday', 'Today', 'Last Week', 'This Week', 'Last Month', and 'This Month'. A table with columns for 'Custom...', 'Employ...', 'Job #', 'Service...', 'Status', 'Schedule D...', 'Schedule TL...', 'Actual Time', 'Est Duration', and 'Ac...' is displayed. An 'Actions' menu is open over the table, with options: 'Export to PDF', 'Export to Excel', 'Configure Report Columns', 'Schedule Report' (highlighted with a red box), and 'Add to Favorites'. The table contains four rows of job data. At the bottom, there is a pagination bar showing '1' of 43 items and '100 items per page'.

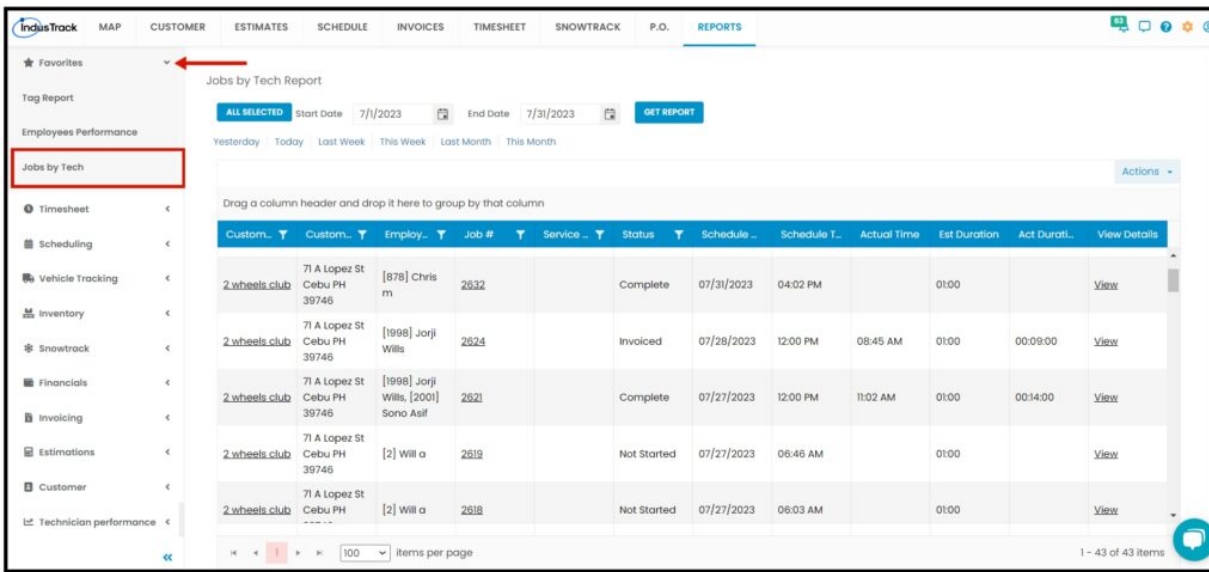
Custom...	Employ...	Job #	Status	Schedule D...	Schedule TL...	Actual Time	Est Duration	Ac...
2_wheels.club	71 A Lopez St Cebu PH 39746	[878] Chris m 2632	Complete	07/31/2023	04:02 PM		01:00	
2_wheels.club	71 A Lopez St Cebu PH 39746	[1998] Jorji Wills 2624	Invoiced	07/28/2023	12:00 PM	08:45 AM	01:00	00:00
2_wheels.club	71 A Lopez St Cebu PH 39746	[1998] Jorji Wills, [2001] Sono Asif 2621	Complete	07/27/2023	12:00 PM	11:02 AM	01:00	00:14:00
2_wheels.club	71 A Lopez St Cebu PH 39746	[2] Will a 2619	Not Started	07/27/2023	06:46 AM		01:00	

Add to Favorites

If you are frequently using this Report, you can select and Add it to your Favorites.



After you added a Report to **Favorites**, a **Favorite Tab** will be added at the top right of the left panel. All reports that are added to Favorite will be listed in the Top panel for easy access.

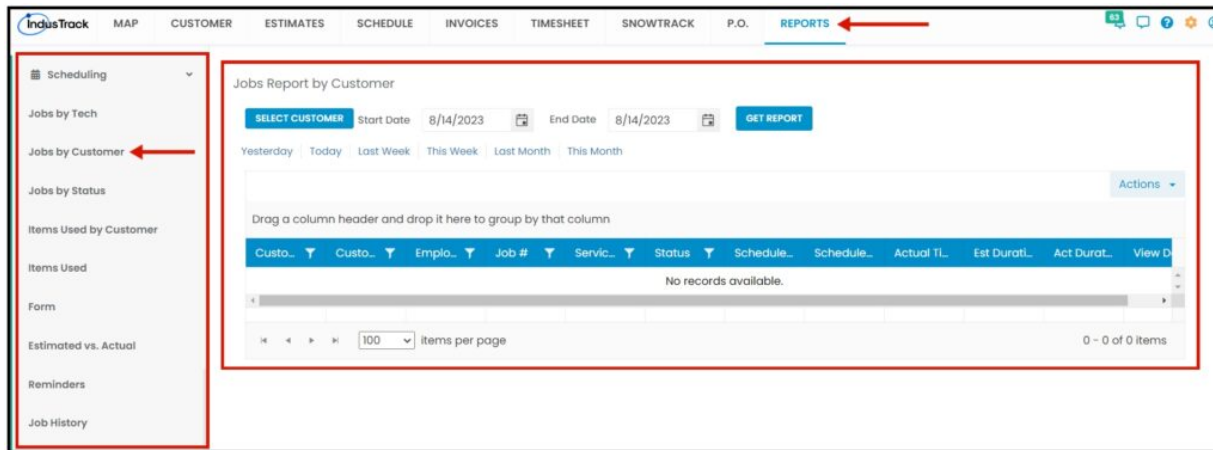


Jobs Report by Customer

- In this report, you can find a summary of all the jobs assigned to a customer in a specific period. These are all the details you will be able to find in this Report:
 - Customer Name
 - Customer Location
 - Employee Name
 - Job Number
 - Service Type
 - Status
 - In the status, you will be able to determine if the Job has been started, declined, or completed.
 - Schedule Date
 - The actual date the job was scheduled.
 - Schedule Time
 - The actual time the job is scheduled.
 - Actual Time
 - The actual time the field employee started the job.
 - Estimated Duration
 - The preconfigured duration of how long the job is estimated to be performed.
 - Actual Duration
 - The actual duration the field employee has finished the job.
 - View Details
 - View the Job Detail Report Preview

Access Jobs Report by Customer:

1. Click on the **Reports Module**
2. On the left panel, select **Scheduling**
3. On the drop-down, click on **Jobs by Customer**

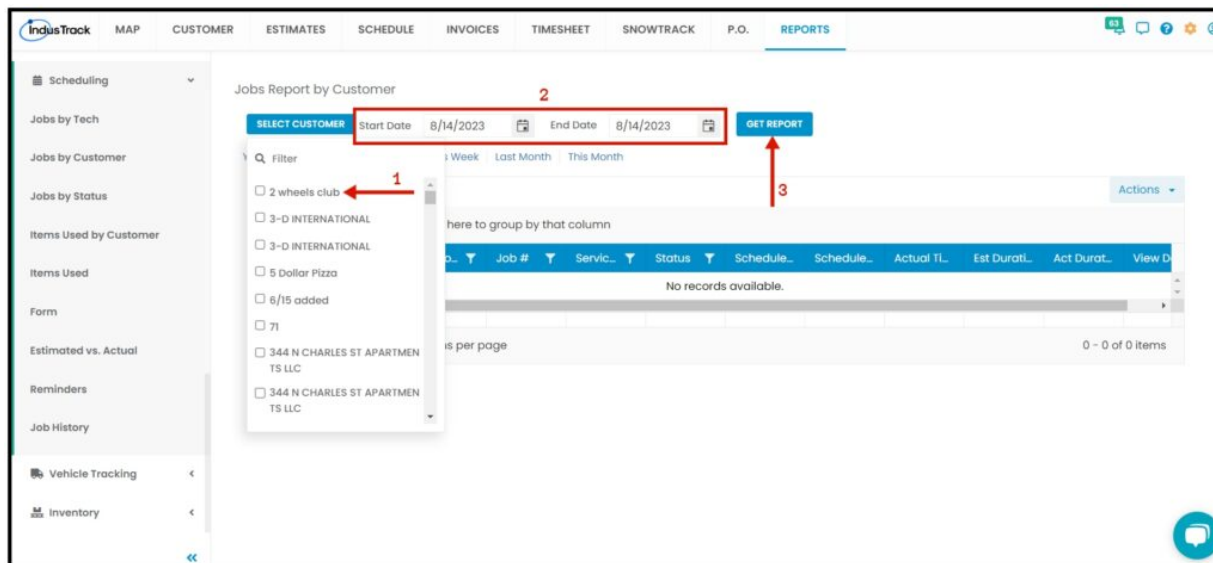


Generate Jobs Report by Customer

On the Jobs Report by Customer page, you can generate all the jobs assigned to a specific customer. Once the Report is generated you will be able to see all the Jobs that were assigned to the selected customer with all details mentioned above.

To generate a jobs report by customer:

1. On the JobsReport by Customer page, select which customer's job reports you would like to view.
 - o You can filter customers by the search bar or on the drop-down. Note that we can only select one customer at a time.
2. Select a Start Date and End Date- By filtering out the start and end dates, you are filtering out the Schedule date of a Job assigned to the selected customer.
3. After filtering out the customer and the Start/End date, click on **Get Report**.



After we were able to generate a job report, you should be able to see all jobs for the selected customer we filtered out with all of their details from the employee name, customer name, customer location, job status, etc.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET SNOWTRACK P.O. **REPORTS**

Jobs Report by Customer

1 SELECTED Start Date 7/1/2023 End Date 7/31/2023 GET REPORT

Yesterday Today Last Week This Week Last Month This Month

Drag a column header and drop it here to group by that column

Custom...	Custom...	Employ...	Job #	Service ...	Status	Schedule D...	Schedule TL...	Actual Time	Est Duration	Act Duration	View Details
2.wheels.club	71 A Lopez St Cebu PH 39746	Chris m	2632		Complete	07/31/2023	04:02 PM		01:00		View
2.wheels.club	248 N Leandro Cir Mesa AZ 5207		2627		Not Started	07/28/2023	12:12 PM		01:00		View
2.wheels.club	71 A Lopez St Cebu PH 39746	Jorji Wills	2624		Complete	07/28/2023	12:00 PM	08:45 AM	01:00	00:09	View
2.wheels.club	71 A Lopez St Cebu PH 39746	Jorji Wills	2621		Complete	07/27/2023	12:00 PM	11:02 AM	01:00	00:14	View
	71 A Lopez St										

1 - 15 of 15 items

Export Job by Customer Report

After we click on Get Report, we can now export the Jobs Report Customer into **Excel or PDF format** by clicking on the **Actions Button** and selecting **Export to PDF or Export to Excel**.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET SNOWTRACK P.O. **REPORTS**

Jobs Report by Customer

1 SELECTED Start Date 7/1/2023 End Date 7/31/2023 GET REPORT

Yesterday Today Last Week This Week Last Month This Month

Drag a column header and drop it here to group by that column

Custom...	Custom...	Employ...	Job #	Service ...	Status	Schedule D...	Schedule TL...	Actual Time	Est Duration	A...	View Details
2.wheels.club	71 A Lopez St Cebu PH 39746	Chris m	2632		Complete	07/31/2023	04:02 PM		01:00		View
2.wheels.club	248 N Leandro Cir Mesa AZ 5207		2627		Not Started	07/28/2023	12:12 PM		01:00		View
2.wheels.club	71 A Lopez St Cebu PH 39746	Jorji Wills	2624		Complete	07/28/2023	12:00 PM	08:45 AM	01:00	00:09	View
2.wheels.club	71 A Lopez St Cebu PH 39746	Jorji Wills	2621		Complete	07/27/2023	12:00 PM	11:02 AM	01:00	00:14	View
	71 A Lopez St										

1 - 15 of 15 items

Actions

- Export to PDF
- Export to Excel
- Configure Report Columns
- Add to Favorites

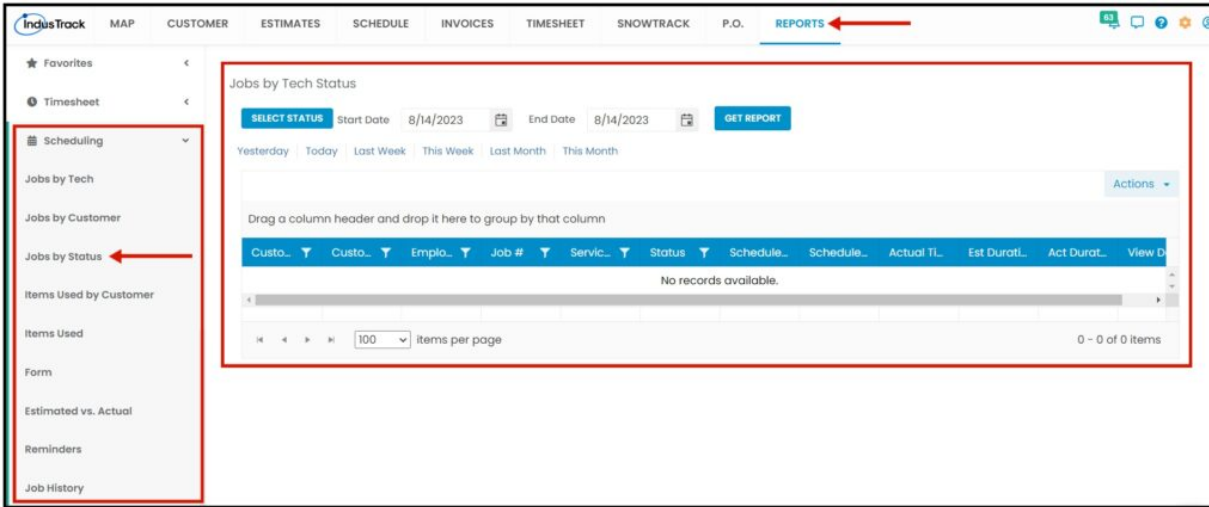
Jobs by Tech Status

In this Report, you will be able to generate all tech's jobs by their statuses during a specific period with the following information:

- Customer Name
- Customer Location
- Employee Name
- Job #
- Service Type
- Status
- Schedule Date
- Schedule Time
- Actual Time
- Est Duration
- Actual Duration
- View Details

Access Jobs by Tech Status Report:

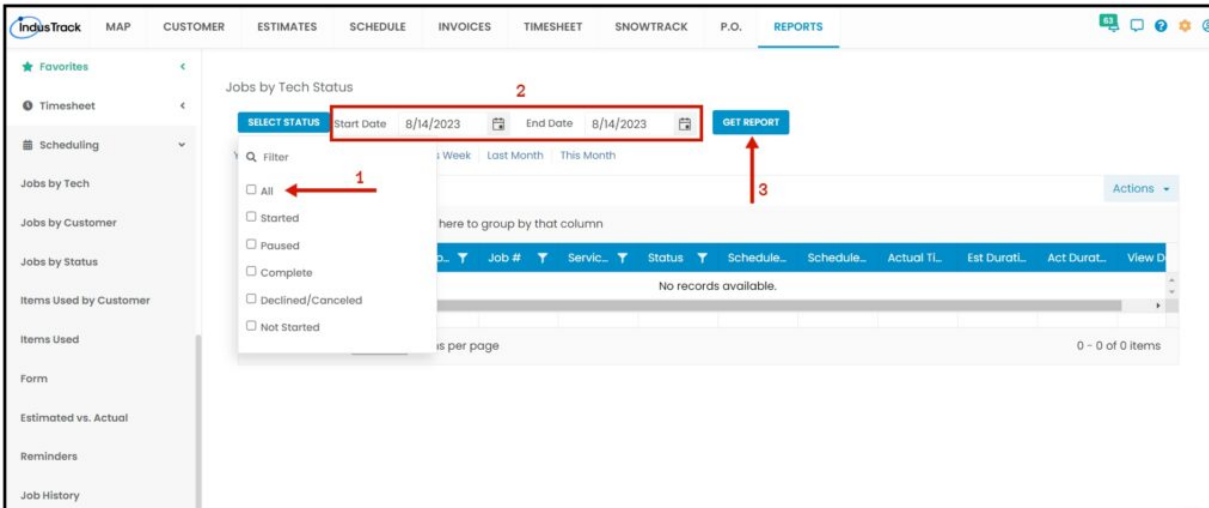
1. Click on the **Reports Module**
2. On the left panel, select **Scheduling**
3. On the drop-down, click on **Jobs by Status**



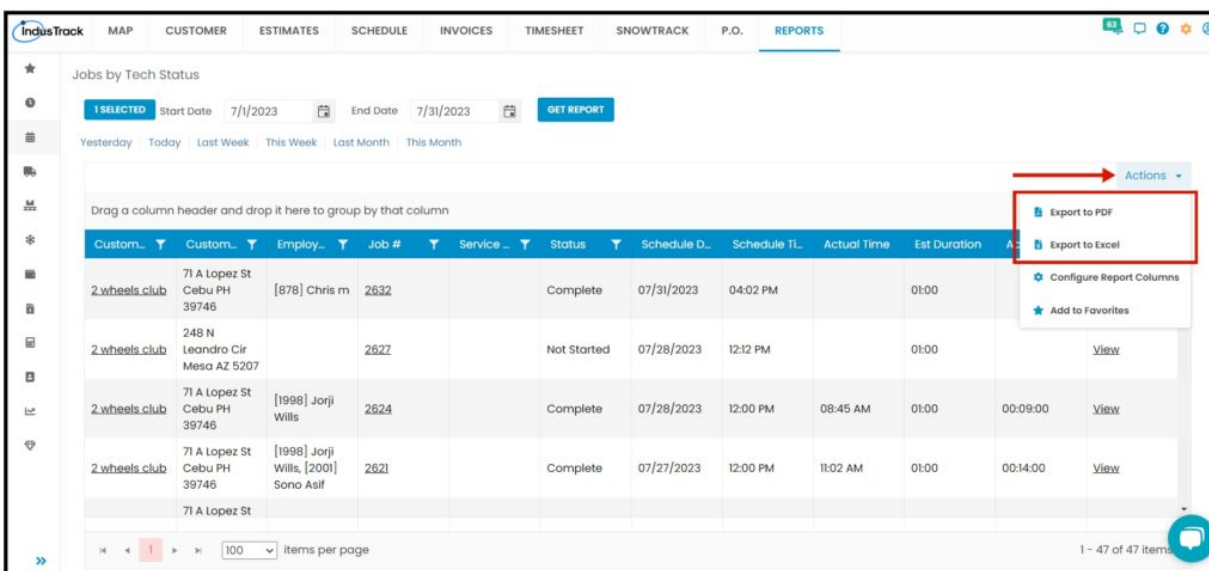
Generate Jobs by Tech Status Report

You can filter the report by the following:

1. Status
 - o Click on **Select Statuses** (All, Started, Paused, Completed, Declined/Canceled, Not Started)
 - o You can either select all Statuses or select one status each time.
2. Date/s – Job Scheduled Date
 - o Select the **start date** and **end date**
3. After you selected the Status and the start and end date, click on **Get Report**.



After we click on Get Report, we can now export the Jobs by Tech Status Report into **Excel or PDF format** by clicking on the **Actions Button** and selecting **Export to PDF or Export to Excel**.

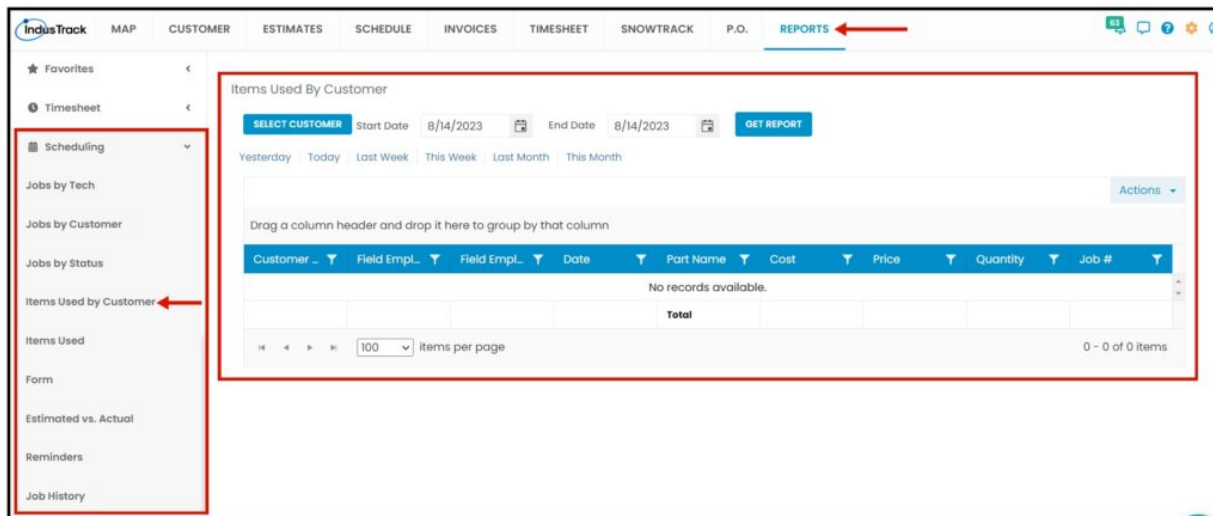


Items used by Customer

- In this report, you can find a summary of all the items used by customers during a specific period with the following Information:
 - Customer Name
 - Field Employee Name
 - Field Employee ID.
 - Date
 - Part Name
 - Cost
 - Price
 - Quantity
 - Job #

Access Items Used by Customer Report:

1. Click on the Reports Module
2. On the left panel, select **Scheduling**
3. On the drop-down, click on **Items Used by Customer**

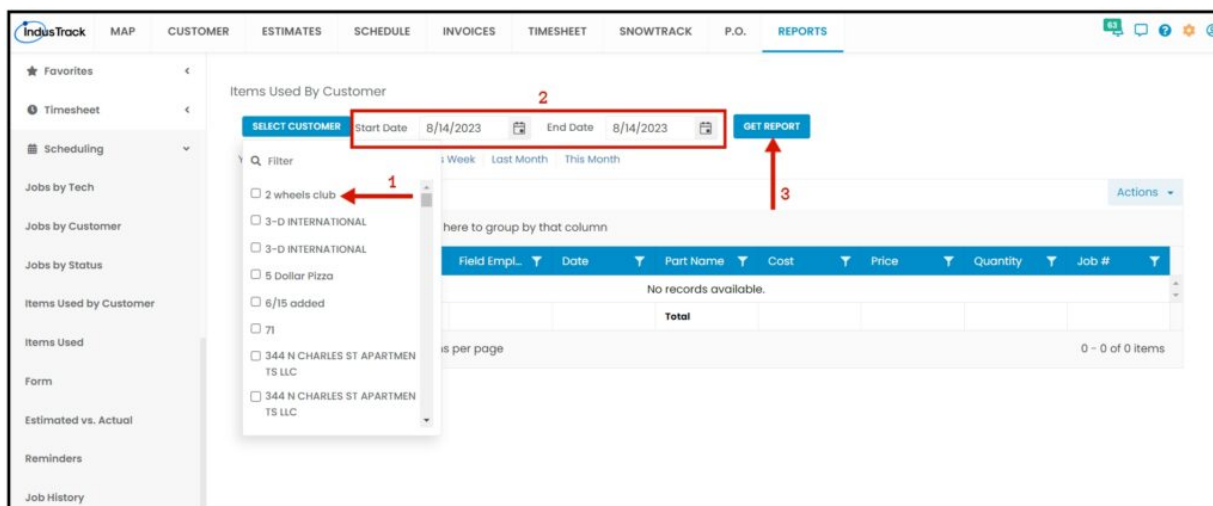


Generate Items Used by Customer Report

On the Items Used by Customer Report page, you can generate all the items used on a job by a certain customer. Once the Report is generated you will be able to see all the items used that were assigned to the selected customer with all details mentioned above.

To generate an Items Used by Customer report:

1. On the items used by the customer report page, select which customer items used reports you would like to view.
 - You can filter customers by the search bar or on the drop-down. Note that we can only select one customer at a time.
2. Select a Start Date and End Date- By filtering out the start and end dates, you are filtering out the date of when the items were used by the selected customer.
3. After filtering out the customer and the Start/End date, click on **Get Report**.



After we were able to generate items used by the customer report, you should be able to see all items used for the selected customer we filtered out with all of their details from the employee name, customer name, item/part name, cost, and price.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET SNOWTRACK P.O. **REPORTS**

Items Used By Customer

1 SELECTED Start Date 7/1/2023 End Date 7/31/2023 GET REPORT

Yesterday Today Last Week This Week Last Month This Month

Drag a column header and drop it here to group by that column

Customer Na...	Field Emplo...	Field Emplo...	Date	Part Name	Cost	Price	Quantity	Job #
2.wheels club	878	Chris m	Thu 07/20/2023	1 1/2 Propress copper coupling	150	180	1	2584
2.wheels club	878	Chris m	Thu 07/20/2023	1 1/2 Propress copper elbow 45	150	180	1	2584
2.wheels club	1998	Jorji Wills	Wed 07/26/2023	1 1/2 Propress copper coupling	150	180	1	2617
2.wheels club	1998	Jorji Wills	Thu 07/27/2023	1 1/2 Propress copper coupling	150	180	1	2621
2.wheels club	1998	Jorji Wills	Fri 07/28/2023	1 1/2 Propress copper coupling	150	180	1	2624
2.wheels club	1998	Jorji Wills	Fri 07/28/2023	1 1/2 Propress copper elbow 45	150	180	1	2624
Total					900	1080		

100 items per page 1 - 6 of 6 items

Export Items Used by Customer Report

After we click on Get Report, we can now export the Items Used by Customer Report into **Excel or PDF** format by clicking on the **Actions Button** and selecting **Export to PDF or Export to Excel**.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET SNOWTRACK P.O. **REPORTS**

Items Used By Customer

1 SELECTED Start Date 7/1/2023 End Date 7/31/2023 GET REPORT

Yesterday Today Last Week This Week Last Month This Month

Drag a column header and drop it here to group by that column

Customer Na...	Field Emplo...	Field Emplo...	Date	Part Name	Cost	Price	Quantity	Job #
2.wheels club	878	Chris m	Thu 07/20/2023	1 1/2 Propress copper coupling	150	180	1	
2.wheels club	878	Chris m	Thu 07/20/2023	1 1/2 Propress copper elbow 45	150	180	1	
2.wheels club	1998	Jorji Wills	Wed 07/26/2023	1 1/2 Propress copper coupling	150	180	1	2617
2.wheels club	1998	Jorji Wills	Thu 07/27/2023	1 1/2 Propress copper coupling	150	180	1	2621
2.wheels club	1998	Jorji Wills	Fri 07/28/2023	1 1/2 Propress copper coupling	150	180	1	2624
2.wheels club	1998	Jorji Wills	Fri 07/28/2023	1 1/2 Propress copper elbow 45	150	180	1	2624
Total					900	1080		

100 items per page 1 - 6 of 6 items

Actions

- Export to PDF
- Export to Excel
- Configure Report Columns
- Add to Favorites

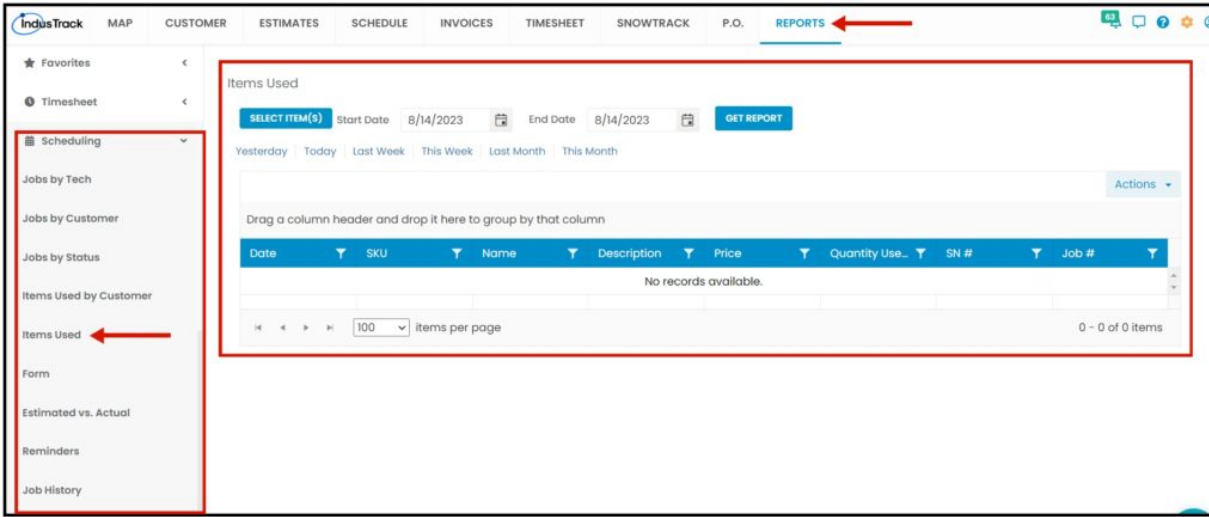
Items Used

In this report, you can find a summary of all the items used during a specific period of time with the following information:

1. Date
 - o The Date of when the item was used.
2. ID
 - o The SKU of the item.
3. Name
4. Description
5. Price
6. Quantity Used
7. Quantity on Hand

Access Items Used Report:

1. Click on the Reports Module
2. On the left panel, select **Scheduling**
3. On the drop-down, click on **Items Used**

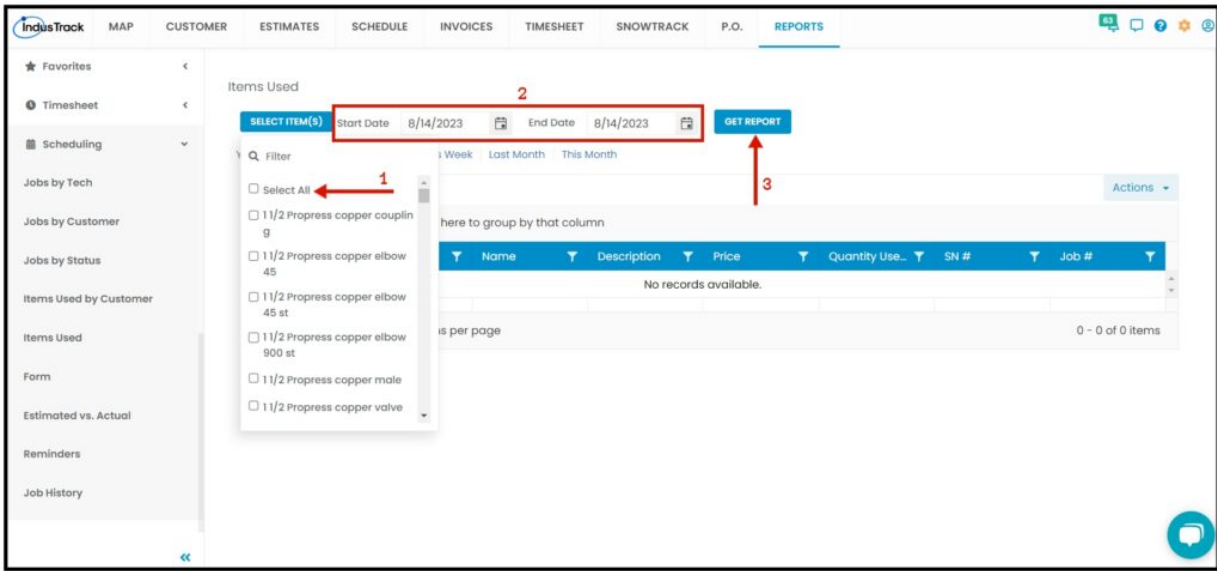


Generate Items Used Report

On the Items Used Report page, you can generate all the items used on completed jobs. Once the Report is generated you will be able to see all the items used on a job with all details mentioned above.

To generate an Items Used report:

1. On the items used report page, select items you would like to get the report of that were used on a specific date.
 - o You can filter items by the search bar, on the drop-down, or select all. You can select multiple items if you want.
2. Select a Start Date and End Date- By filtering out the start and end dates, you are filtering out the date when the items were used.
3. After filtering out the item/s and the Start/End date, click on **Get Report**.



After we were able to generate the Items Used report, you should be able to see all items used for the selected date with all of their details from the item name, the date when the item was used, the item description, the price, the quantity used, and on hand.

Items Used

ALL SELECTED Start Date 7/1/2023 End Date 7/31/2023 GET REPORT

Yesterday Today Last Week This Week Last Month This Month

Drag a column header and drop it here to group by that column

Date	SKU	Name	Description	Price	Quantity Used	SN #	Job #
07/11/2023		1 1/2 Propress copper coupling		180	1		2447
07/11/2023		1 1/2 Propress copper elbow 45		180	1		2447
07/14/2023		1 1/2 Propress copper coupling		180	1	44	2482
07/20/2023		1 1/2 Propress copper coupling		180	1		2584
07/20/2023		1 1/2 Propress copper elbow 45		180	1		2584
07/24/2023		1 1/2 Propress copper coupling		180	1		2615

100 items per page 1 - 17 of 17 items

Export Items Used Report

After we click on Get Report, we can now export the Items Used Report into **Excel or PDF format** by clicking on the **Actions Button** and selecting **Export to PDF or Export to Excel**.

Items Used

ALL SELECTED Start Date 7/1/2023 End Date 7/31/2023 GET REPORT

Yesterday Today Last Week This Week Last Month This Month

Drag a column header and drop it here to group by that column

Date	SKU	Name	Description	Price	Quantity Used	SN #	Job #
07/11/2023		1 1/2 Propress copper coupling		180	1		
07/11/2023		1 1/2 Propress copper elbow 45		180	1		
07/14/2023		1 1/2 Propress copper coupling		180	1	44	2482
07/20/2023		1 1/2 Propress copper coupling		180	1		2584
07/20/2023		1 1/2 Propress copper elbow 45		180	1		2584
07/24/2023		1 1/2 Propress copper coupling		180	1		2615

100 items per page 1 - 17 of 17 items

- Export to PDF
- Export to Excel
- Configure Report Columns
- Schedule Report
- Add to Favorites

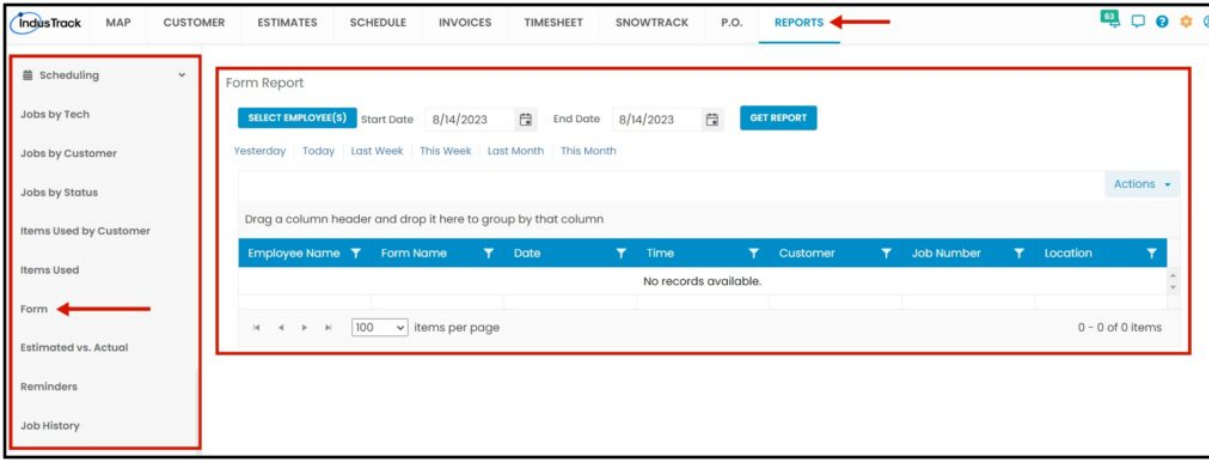
Forms Report

In this report, you can find a detailed report of all the submitted electronic forms that were filled out by field employees or customers (depending on the type of form) from a dispatched job. These are all the details you will be able to find in this Report:

- Employee Name
 - Name of the field employee who submitted the form.
- Form Name
- Date
 - The date of when the form was submitted.
- Time
 - The exact time the form was submitted.
- Customer
 - Which customer's job the form was dispatched to.
- Job Number
- Location
 - The location of the job where the form was submitted.

Access Forms Report:

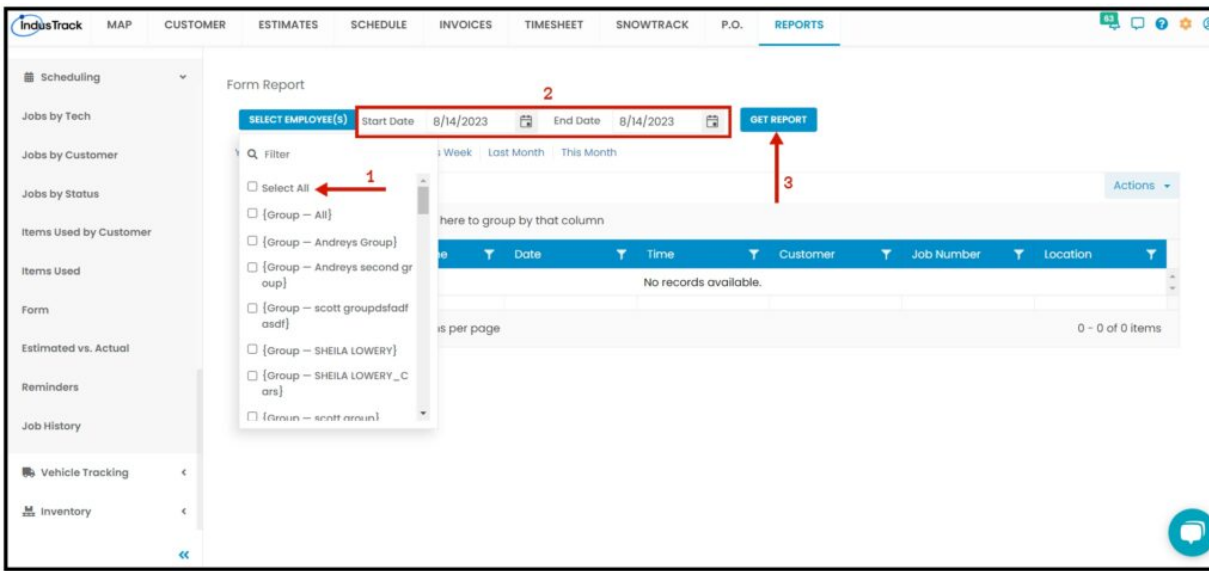
- Click on the **Reports Module**
- On the left panel, select **Scheduling**
- On the drop-down, click on **Forms**



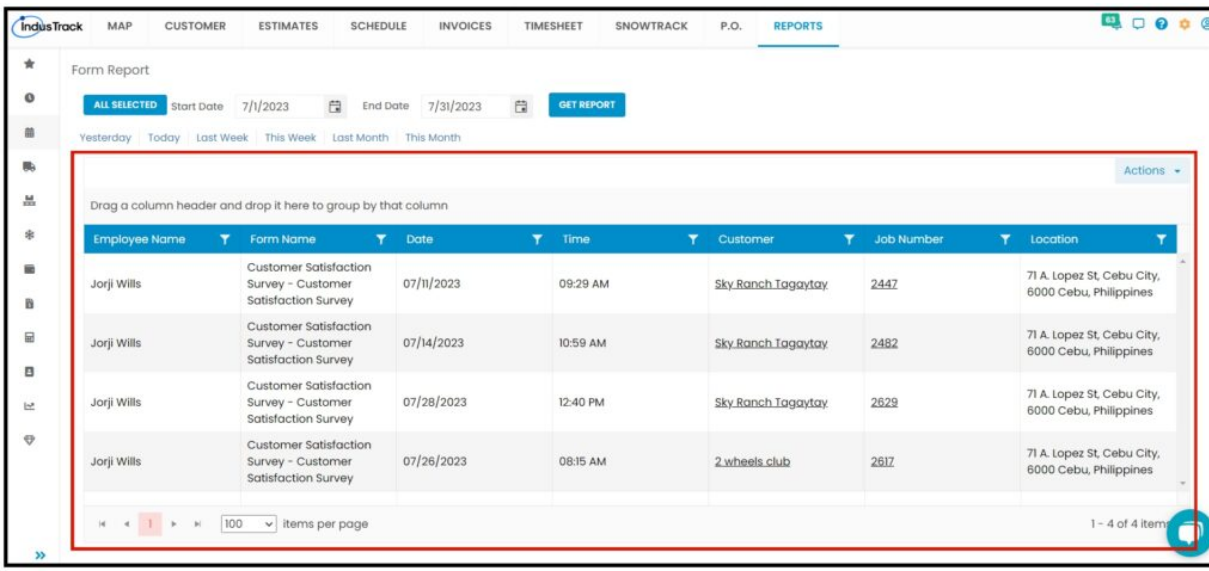
Generate the Form Report

On the Form Report page, you can generate all the submitted forms from dispatched jobs. Once the Report is generated you will be able to see all forms that were used in a job.

1. On the Form report page, select which **field employees'** submitted form you would like to view.
 - o You can filter field employees by the search bar, on the drop-down, by groups, or select all employees.
2. **Select a Start Date and End Date**– By filtering out the start and end dates, **you are filtering out the date when the form was submitted.**
3. After filtering out field employee/s and the Start/End date, click on **Get Report.**

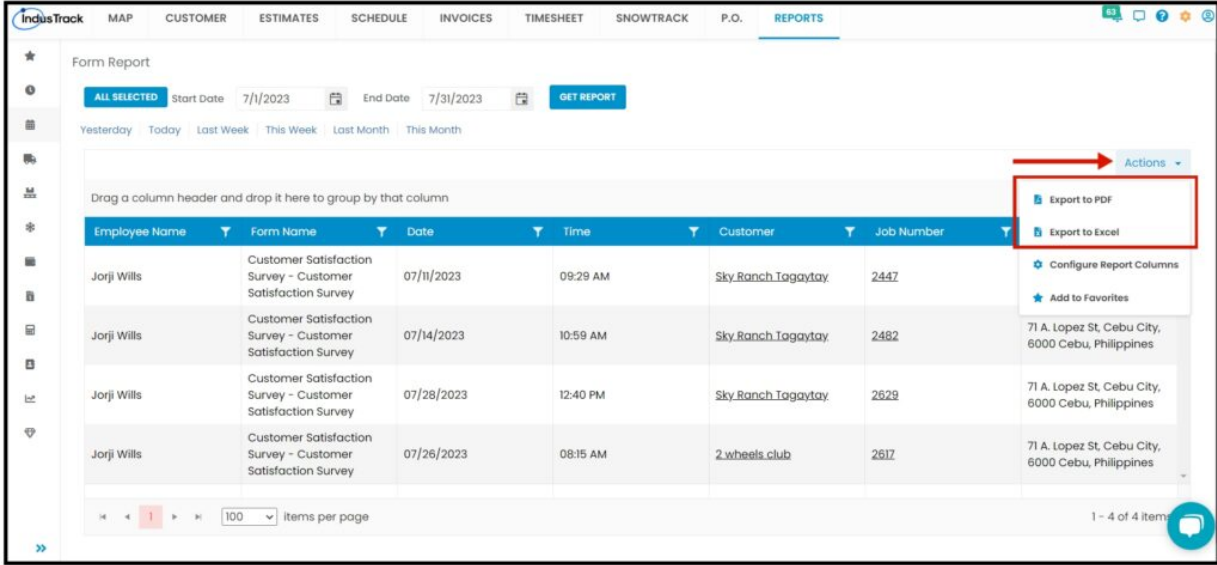


After we were able to generate the Form Report, you should be able to see all the submitted forms with all of their details from the employee name, form name, the date and time when the form was submitted, etc.



Export Form Report

After we click on Get Report, we can now export the Forms Report into **Excel or PDF format** by clicking on the **Actions Button** and selecting **Export to PDF or Export to Excel**.

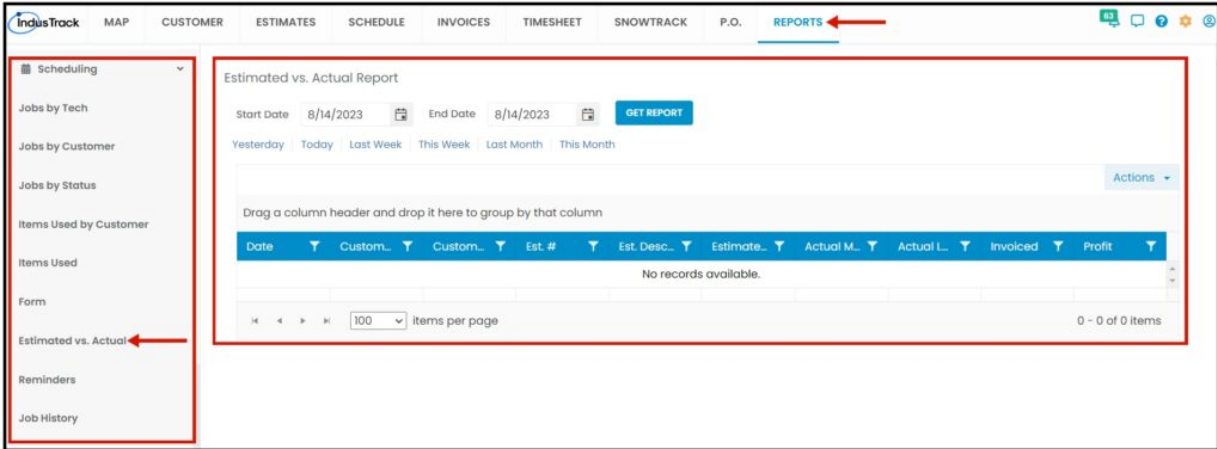


Estimated vs Actual Report

- In this report, you can find a summary of all the estimates made versus the actual invoiced on a specific period with the ff. Information:
 - Date
 - Customer Name and Location
 - Estimate No
 - Estimate Description
 - Estimated
 - Actual Material
 - Actual Labor
 - Invoiced
 - Profit

Access Estimated vs Actual Report:

- Click on the **Reports Module**
- On the left panel, select **Scheduling**
- On the drop-down, click on **Estimated vs Actual**



Generate Estimated vs Actual Report

On the Estimated vs Actual Report page, you can generate all customer jobs with details about the estimated cost of materials used and the actual cost of materials used on the job. Once the Report is generated you will be able to see detailed information about the estimated vs actual/invoiced cost of materials used, profit, etc.

1. On the Estimated vs Actual page, filter out the Start and End Date. Note that you are filtering out the date of when the customer job was created.
2. Click on **Get Report**.

Estimated vs. Actual Report 1

Start Date 8/14/2023 End Date 8/14/2023 GET REPORT

Yesterday Today Last Week This Week Last Month This Month

Drag a column header and drop it here to group by that column

Date	Custom...	Custom...	Est. #	Est. Desc...	Estimate...	Actual M...	Actual L...	Invoiced	Profit
No records available.									

100 items per page 0 - 0 of 0 items

After we were able to generate the Estimated vs Actual Report, you should be able to see the customer's jobs with details about the estimated cost of materials used vs the actual/ invoiced cost of materials used on the job, the profit gained, etc.

Estimated vs. Actual Report

Start Date 7/1/2023 End Date 7/31/2023 GET REPORT

Yesterday Today Last Week This Week Last Month This Month

Drag a column header and drop it here to group by that column

Date	Custom...	Custom...	Est. #	Est. Desc...	Estimate...	Actual M...	Actual L...	Invoiced	Profit
07/14/2023	Sky Ranch Jagaytay	8401 Elliot Ave S, Minneapolis, Minnesota, 55420, United States				\$0.00	\$0.00	\$1,109.93	
07/14/2023	2 wheels club	71 A Lopez St, Cebu, PH, 39746				\$0.00			
07/14/2023	344 N CHARLES ST APARTMENTS LLC	6212 YORK RD, BALTIMORE, MD, 21212				\$0.00			

100 items per page 1 - 14 of 14 items

Export Estimated vs Actual Report

After we click on Get Report, we can now export the Estimated vs Actual Report into **Excel or PDF format** by clicking on the **Actions Button** and selecting **Export to PDF or Export to Excel**.

Estimated vs. Actual Report

Start Date 7/1/2023 End Date 7/31/2023 GET REPORT

Yesterday Today Last Week This Week Last Month This Month

Drag a column header and drop it here to group by that column

Date	Customer ...	Customer L...	Est. #	Est. Descrip...	Estimated	Actual Mat	Actual Labor	Invoiced	Profit
07/14/2023	Sky Ranch Jagaytay	8401 Elliot Ave S, Minneapolis, Minnesota, 55420, United States				\$0.00	\$0.00	\$1,109.93	
07/14/2023	2 wheels club	71 A Lopez St, Cebu, PH, 39746				\$0.00			
07/14/2023	344 N CHARLES ST APARTMENTS LLC	6212 YORK RD, BALTIMORE, MD, 21212				\$0.00			
07/20/2023	Sky Ranch Jagaytay	8401 Elliot Ave S, Minneapolis, Minnesota, 55420, United States				\$0.00		\$180.00	

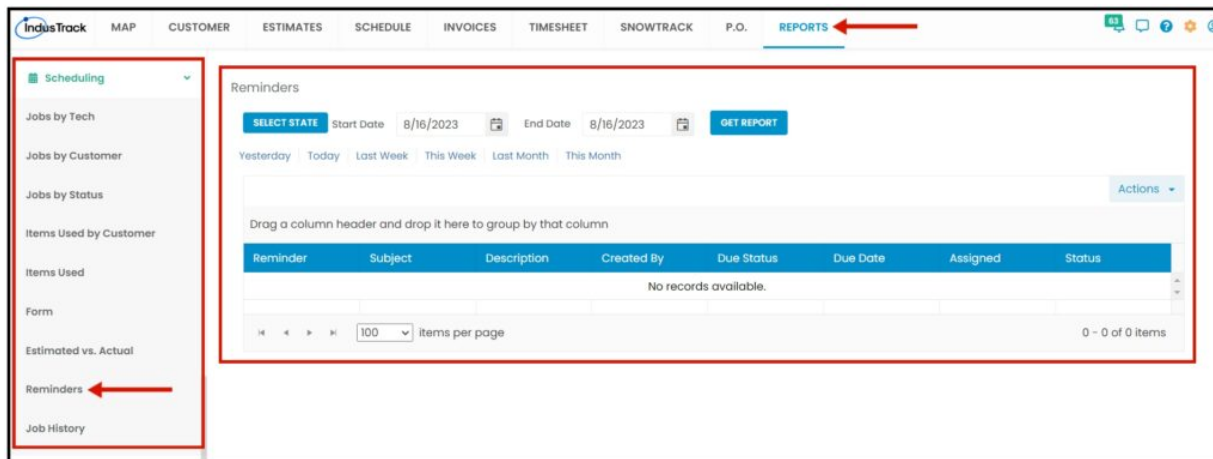
100 items per page 1 - 14 of 14 items

Reminders Report

- In this report, you can find a summary of all your reminders per status; Open, Postponed, Completed, Due Date | Inventory, Jobs, Services, Equipment, Parts; on a specific period with the ff. Information:
 - Reminder
 - Subject
 - Description
 - Created by
 - Due Date
 - Created Date/Time
 - Assigned to
 - Status

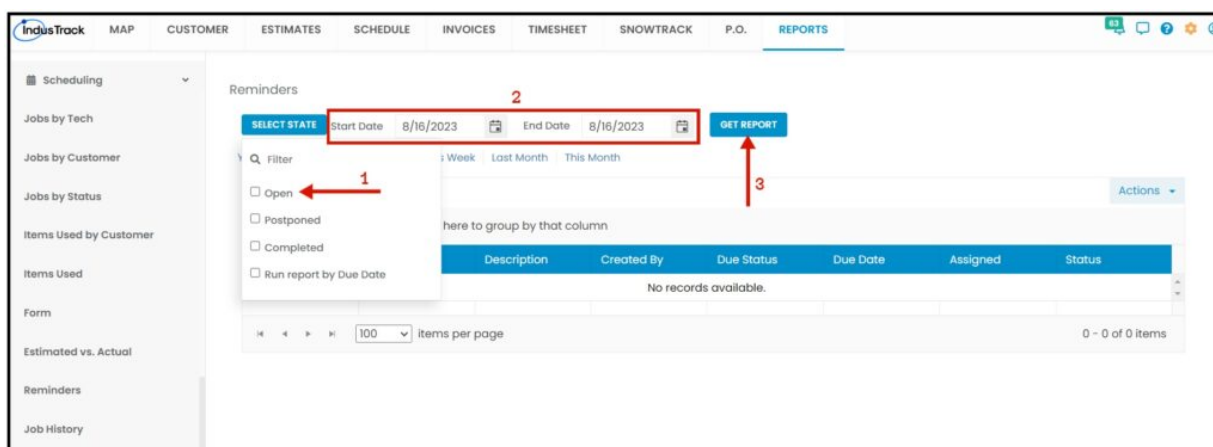
Access Reminders Report:

1. Click on the **Reports Module**
2. On the left panel, select **Scheduling**
3. On the drop-down, click on **Reminders**



Generate Reminders Report

- You can filter the report by the following:
 - State –Current state (Open, Postponed, Completed, Run report by Due Date)
 - Click on **Select State**
 - You can **SELECT ONE or MORE** from the Drop Down Menu
 - Date/s – specific date of the report
 - Select the **start date** and **end date**
 - After you selected the state and the start and end date, click **Get Report**.



Export Reminders Report

After we click on Get Report, we can now export the Reminders Report into **Excel or PDF format** by clicking on the **Actions Button** and selecting **Export to PDF** or **Export to Excel**.

Reminders

ALL SELECTED Start Date 7/1/2023 End Date 7/31/2023 GET REPORT

Yesterday Today Last Week This Week Last Month This Month

Drag a column header and drop it here to group by that column

Reminder	Subject	Description	Created By	Due Status	Due Date	Assigned
New Job Added		work	[STM]Chris m	Overdue for 16 days	07/31/2023	2 wheels club
New Inventory Added			Chris m	Overdue for 17 days	07/30/2023	New Inventory was added by Chris m
Job on hold		Cooper wiring	System	Overdue for 19 days	08/09/2023	Muhammad d
New Job Added		Im	[STM]Will a	Overdue for 19 days	07/28/2023	401 N. CHARLES LLC
New Job Added		Market app	[STM]Will a	Overdue for 20 days	07/27/2023	344 N CHARLES ST APARTMENTS LLC
New Job Added		Test images	[STM]Will a	Overdue for 20 days	07/27/2023	2 wheels club
New Job Added		D	[STM]Will a	Overdue for 20 days	07/27/2023	2 wheels club
New Job Added		Various Remediations	[STM]Chris m	Overdue for 27 days	07/20/2023	2 wheels club

100 items per page 1 - 13 of 13 items

Job History Report

In this report, you will be able to find the summary of all the jobs assigned to a specific field employee with the following details:

- Customer Name
- Customer Location
- Employee Name
- Job #
- Service Type
- Job Status
- Schedule Date
- Schedule Time
- Actual Time
- Est Duration
- Actual Duration

To view **Job History Report**, go to **Reports** Menu on the top>Click **Scheduling**> on the drop-down click **Job History**.

Job History Report

SELECT EMPLOYEE(S) Start Date 8/16/2023 End Date 8/16/2023 GET REPORT

Yesterday Today Last Week This Week Last Month This Month

Drag a column header and drop it here to group by that column

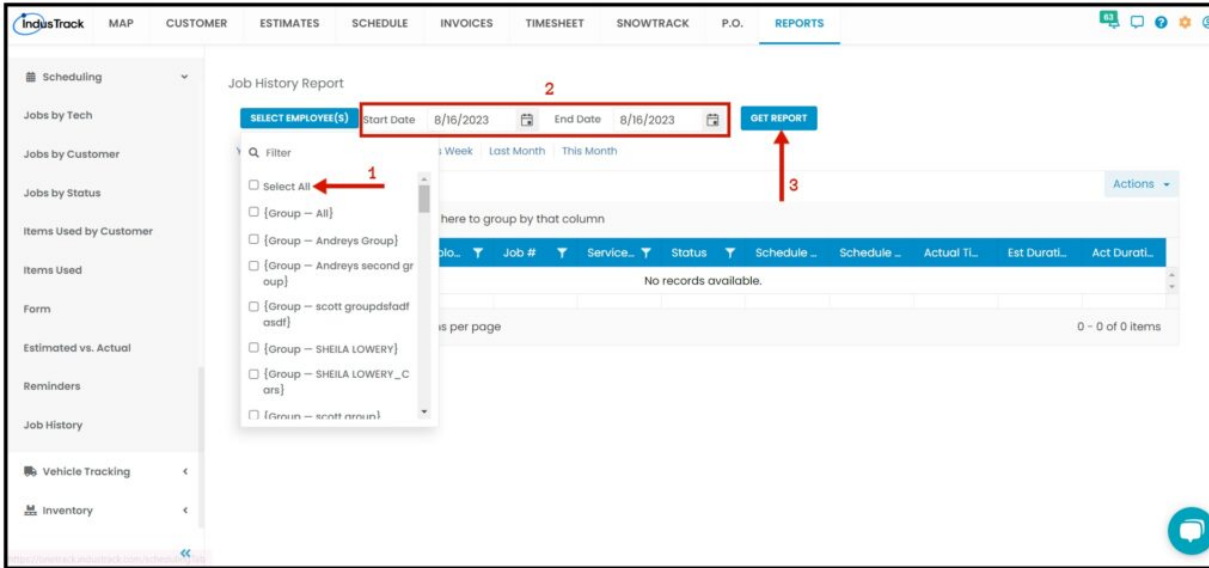
Custo...	Custo...	Emple...	Job #	Service...	Status	Schedule ..	Schedule ..	Actual TI...	Est Durati...	Act Durati...
No records available.										

100 items per page 0 - 0 of 0 items

Generate Job History Report

You can filter the report by the following:

1. Employees –Name/s of employees
 - Click on **Select Employee/s**
 - You have the option to either select one certain employee, multiple employees, by group, or select all employees.
2. Date/s – specific date of the report
 - Select the **start date** and **end date**
3. After you selected the employee/s and the start and end date, click on **Get Report**.



After we click on Get Report, we can now export the Job History Report into **Excel** or **PDF** format by clicking on the **Actions** Button and selecting **Export to PDF** or **Export to Excel**.

