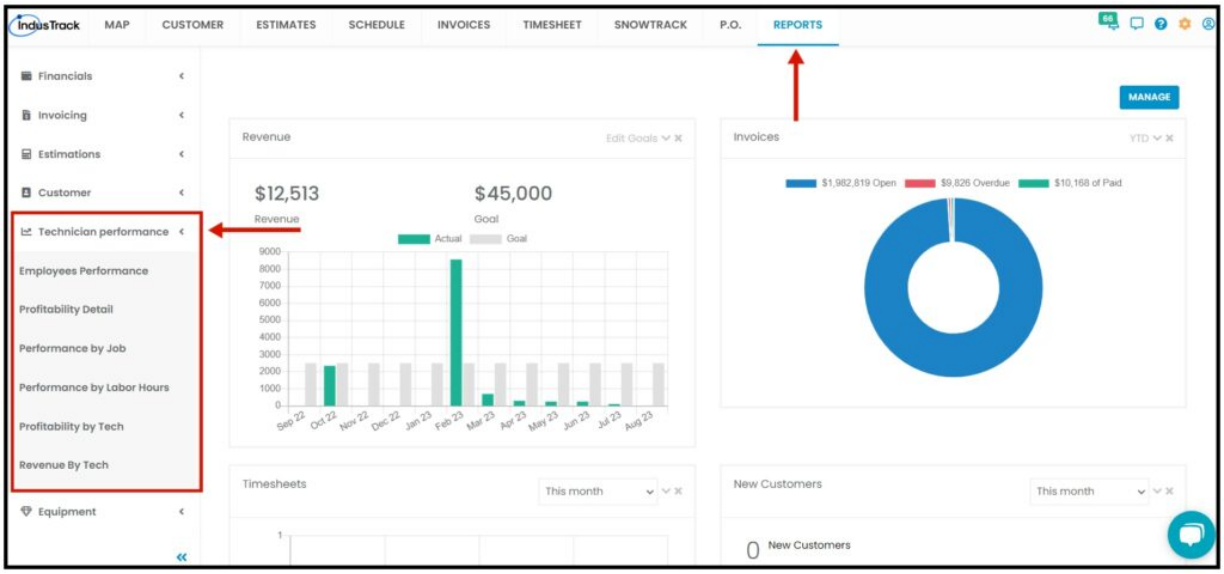
Technician Performance Report

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

A drop-down option will show its subcategories for the reports you want to see:

- Employees Performance
- Profitability Detail
- Performance by Job
- Performance by Labor Hours
- Profitability by Tech
- Revenue By Tech

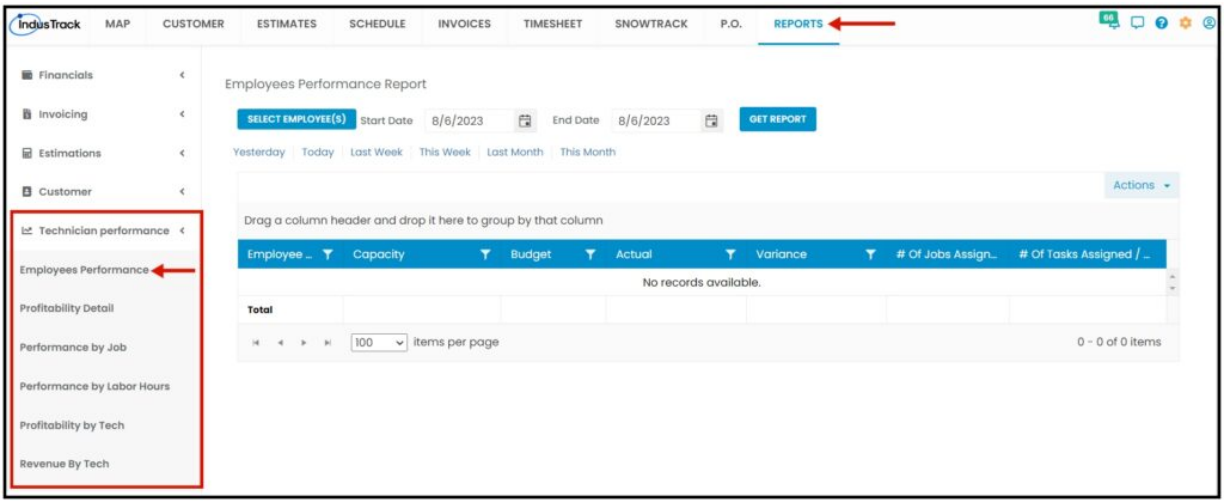


Employees Performance Report

In this Report, you will get able to generate the number of jobs assigned and completed by each field employee and more details:

- Employee Name
- Capacity
- Budget
- Actual
- Variance
- # of Jobs Assigned / Completed
- # of Tasks Assigned / Completed

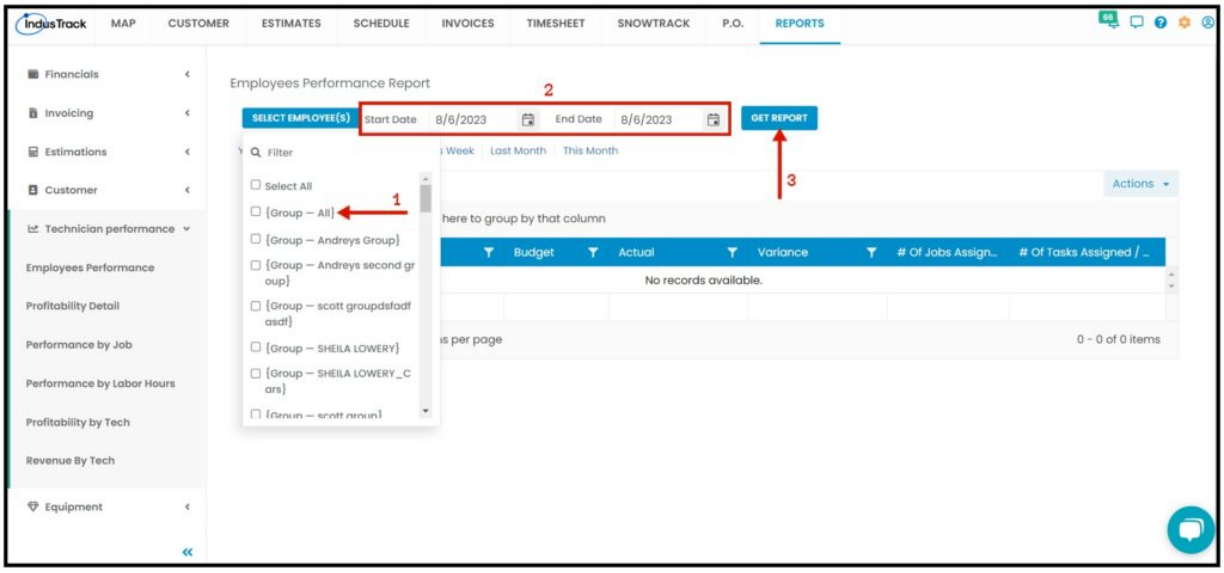
To view the Employees Performance Report, go to **Reports** Menu on the top> Click **Technician Performance**> on the drop-down click **Employees Performance**.



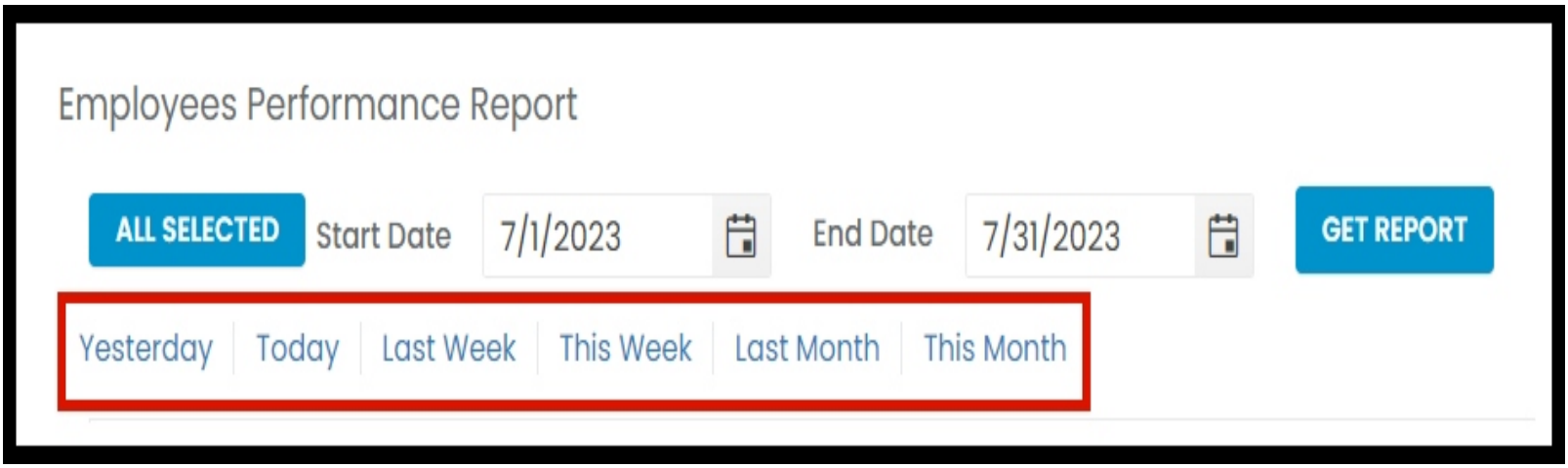
Generate Employees Performance Report

You can filter the report by the following:

1. Employees –Name/s of employees
    - Click on **Select Employees**
    - 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.**



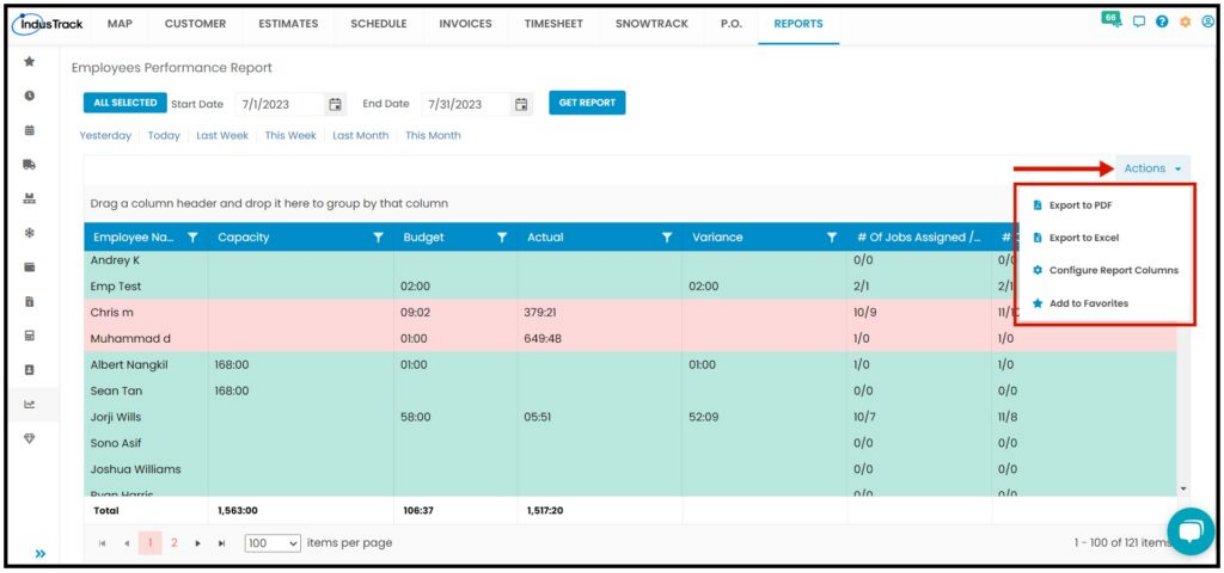
- Alternatively, you can also select a period rather than selecting a specific date:
    - *Yesterday* | *Today* | *last Week* | *This Week* | *Last Month* | *This Month*



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

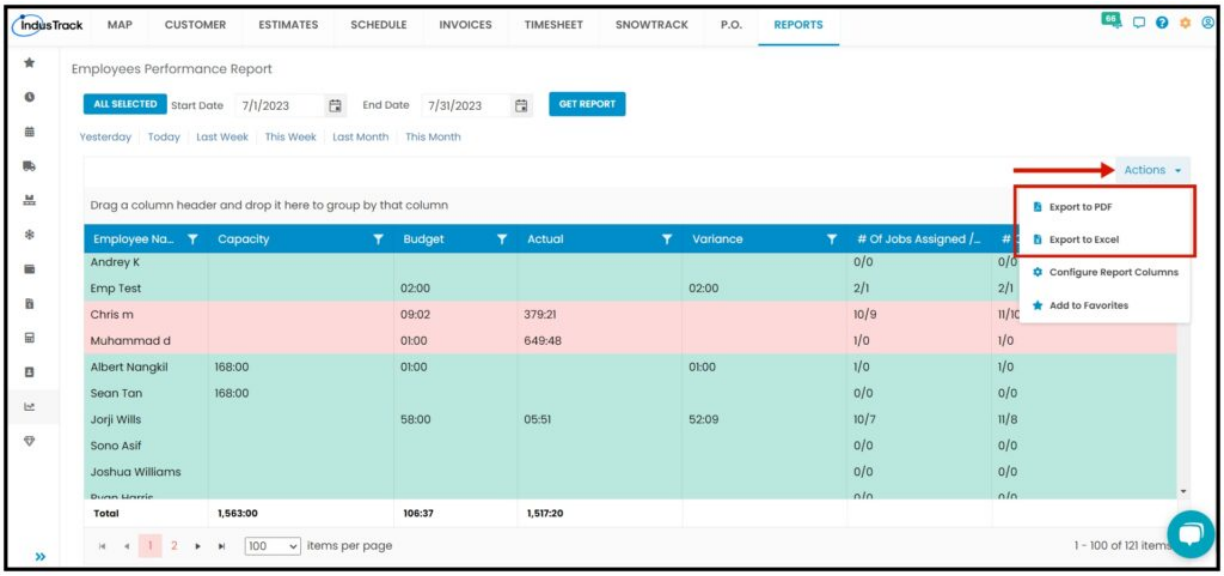
Actions Button

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



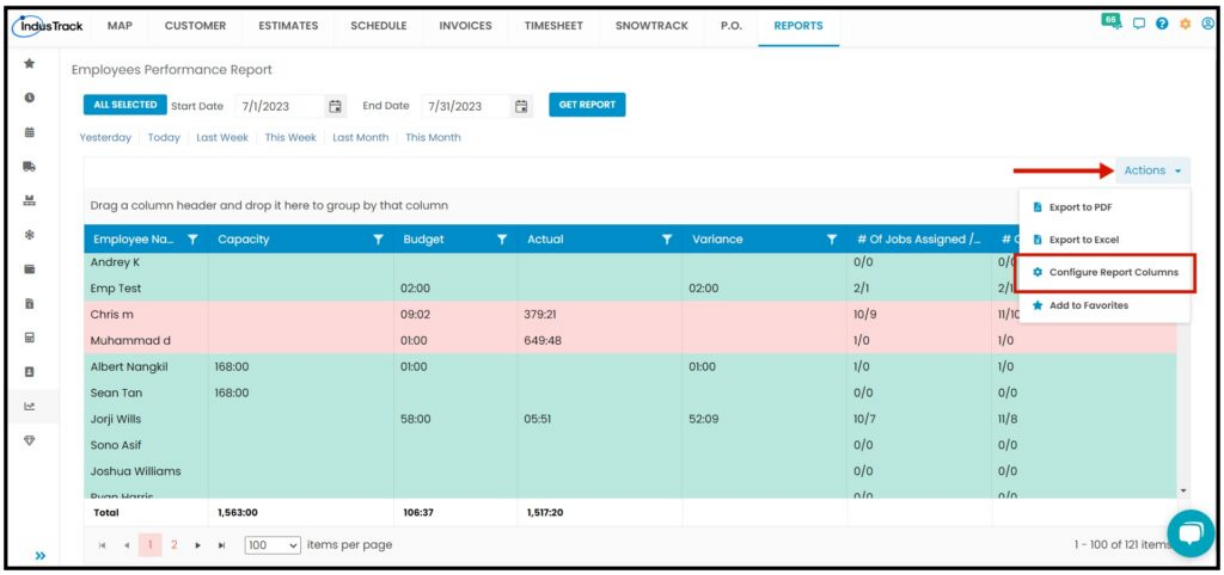
Export Report

- 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.

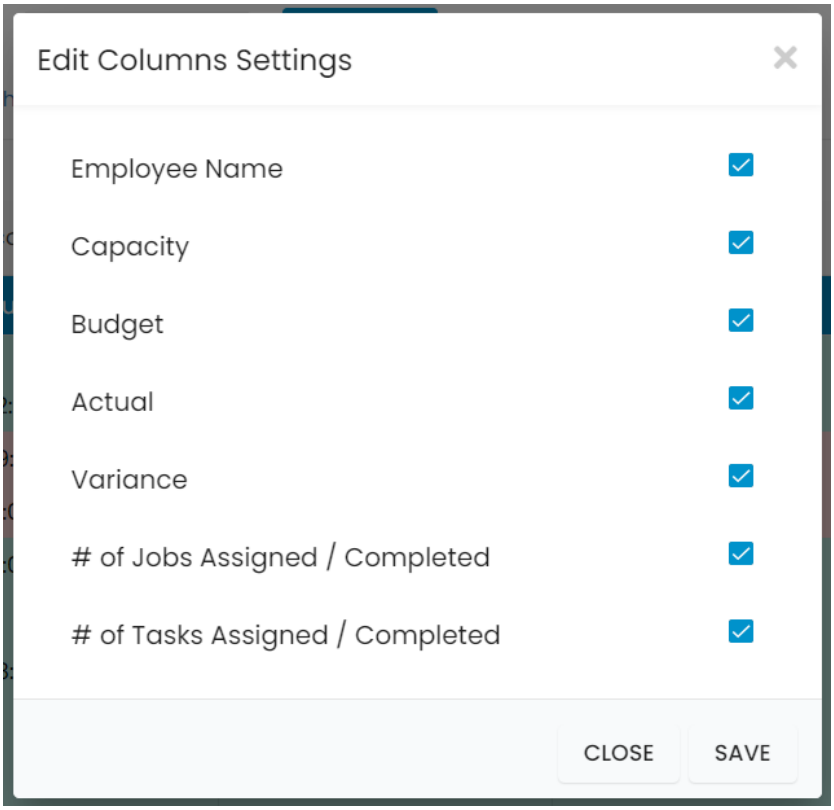


Configure Report Columns

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.

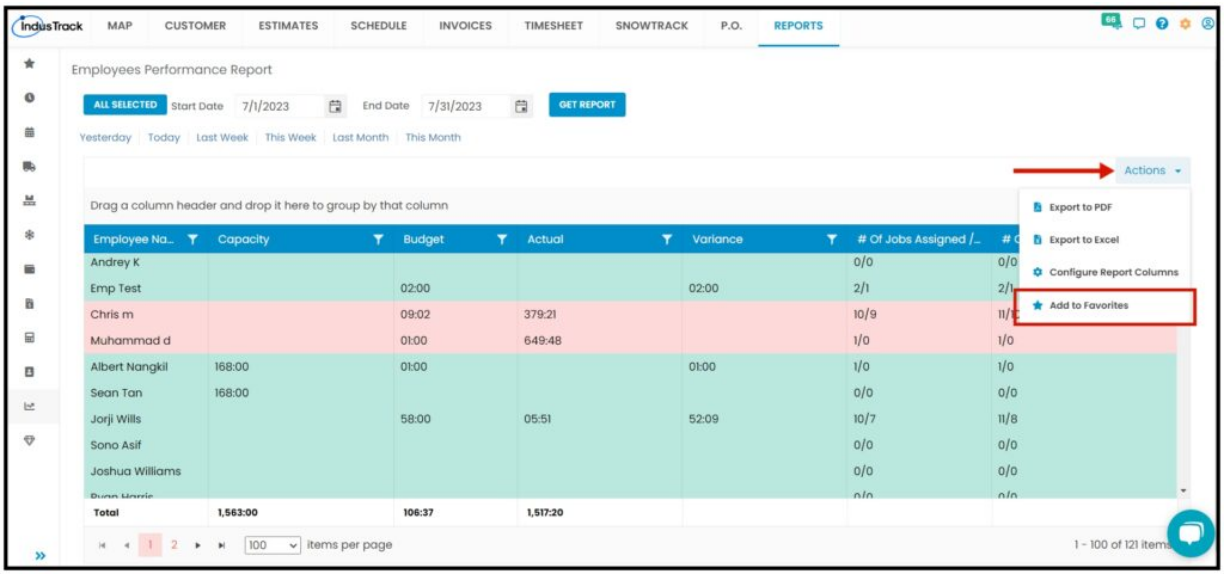


Uncheck columns you don’t want to see in the Report. Click SAVE after configuring.

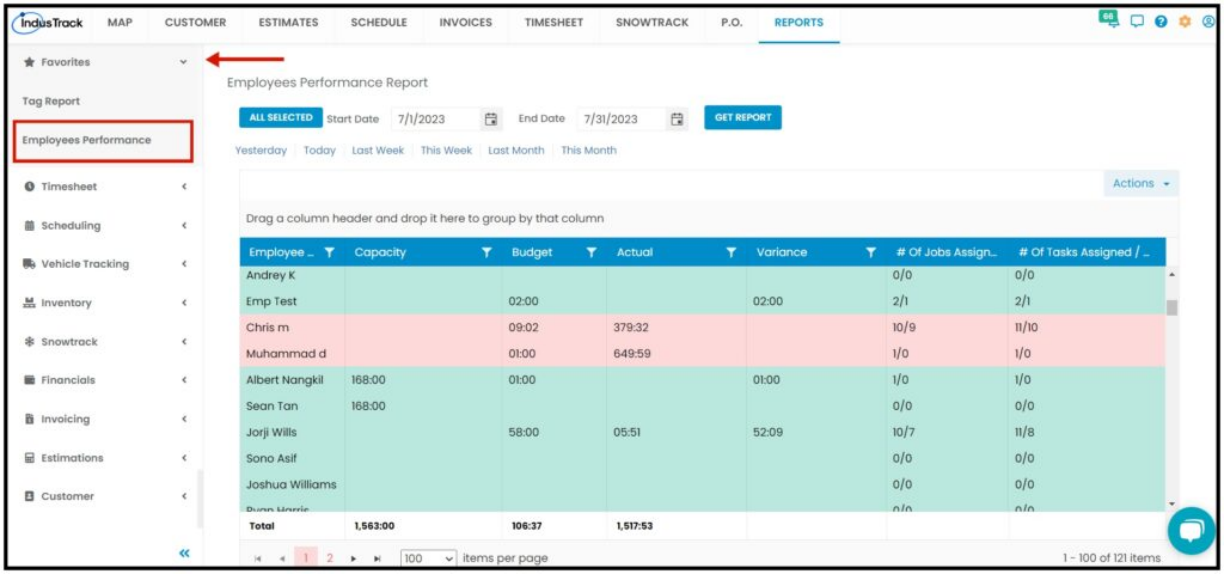


Add to Favorites

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

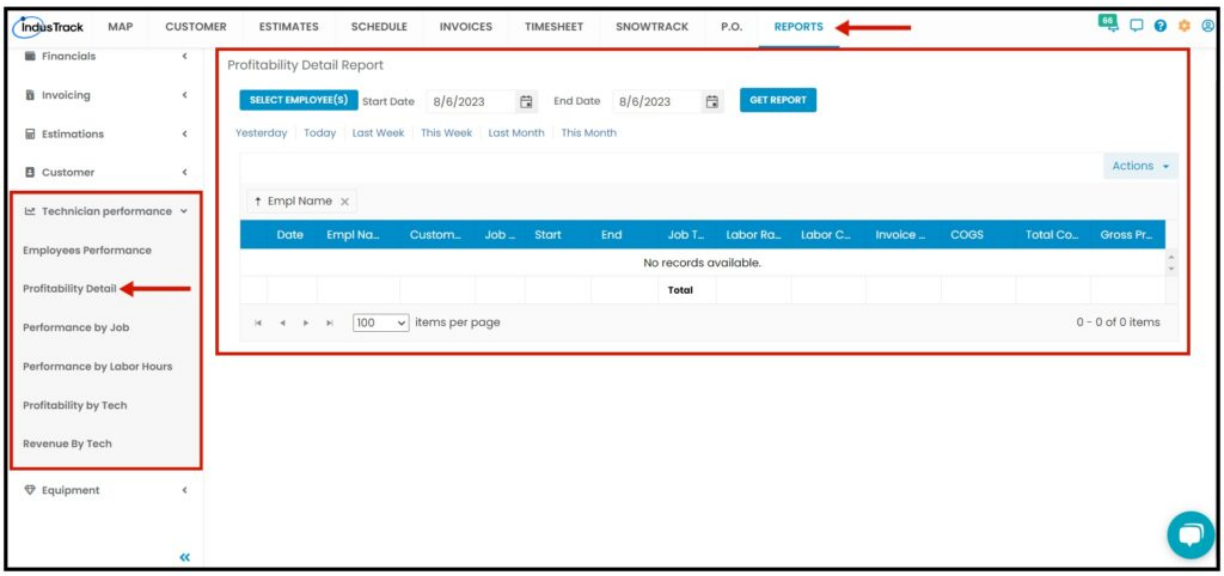


Profitability Detail Report

You can find in this report detailed info on your employee's Total jobs and how much profit they made for those jobs.

- Date
- Employee Name
- Customer
- Job Number
- Start
- End
- Job Time
- Labor Rate
- Labor Cost
- Invoice Total
- COGS – Cost of Goods Sold
- Total Cost
- Gross Profit

To view the Profitability Detail **Report**, go to **Reports** Menu on the top>Click **Technician Performance**> on the drop-down click **Profitability Detail**.

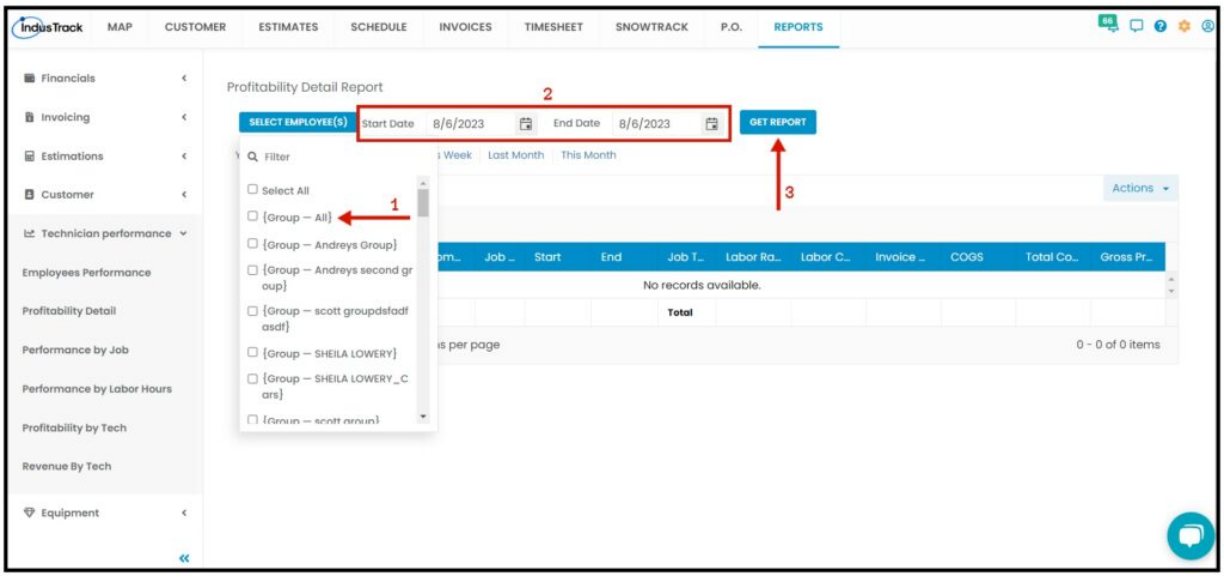


Generate Profitability Detail Report

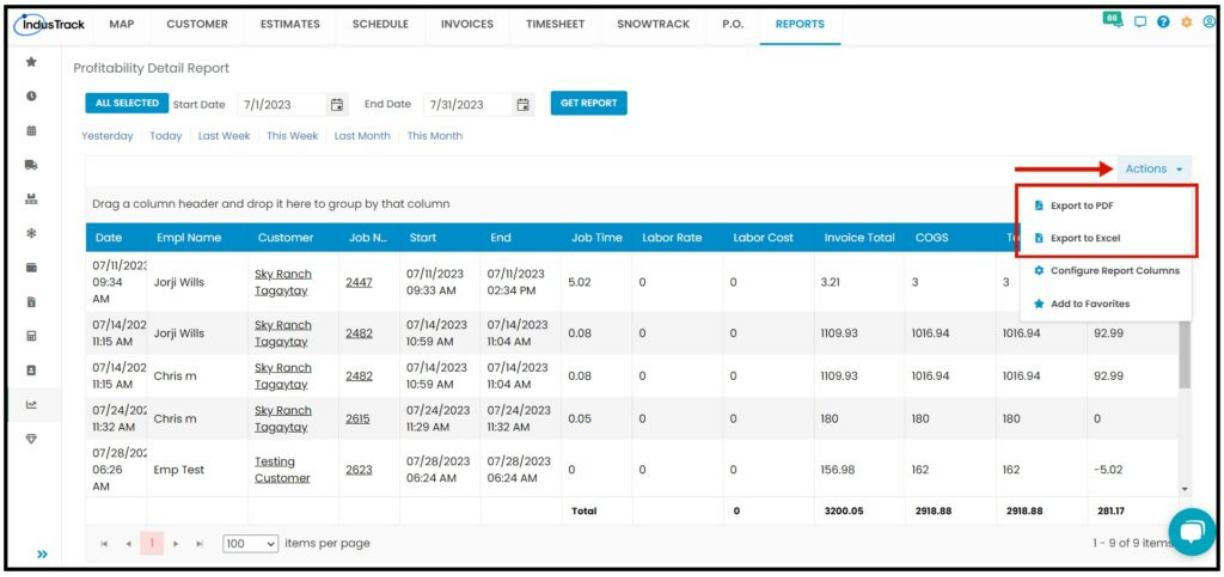
You can filter the report by the following:

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 Profitability Detail Report into **Excel or PDF format** by clicking on the **Actions Button** and selecting **Export to PDF or Export to Excel.**

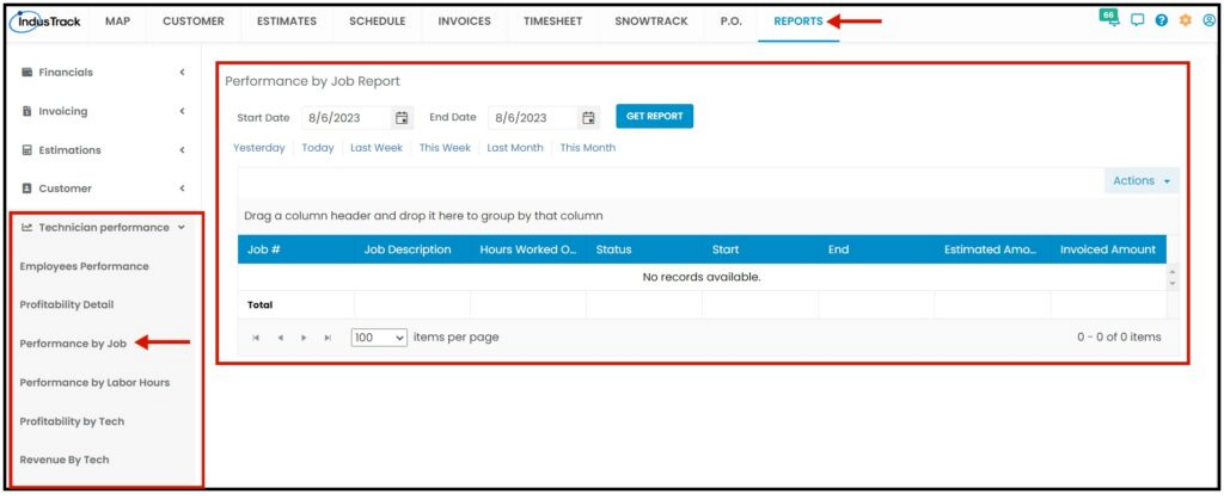


Performance by Job Report

Generate all jobs for a specific date, you will be able to see here the actual hours spent on the Job and its statuses and other information:

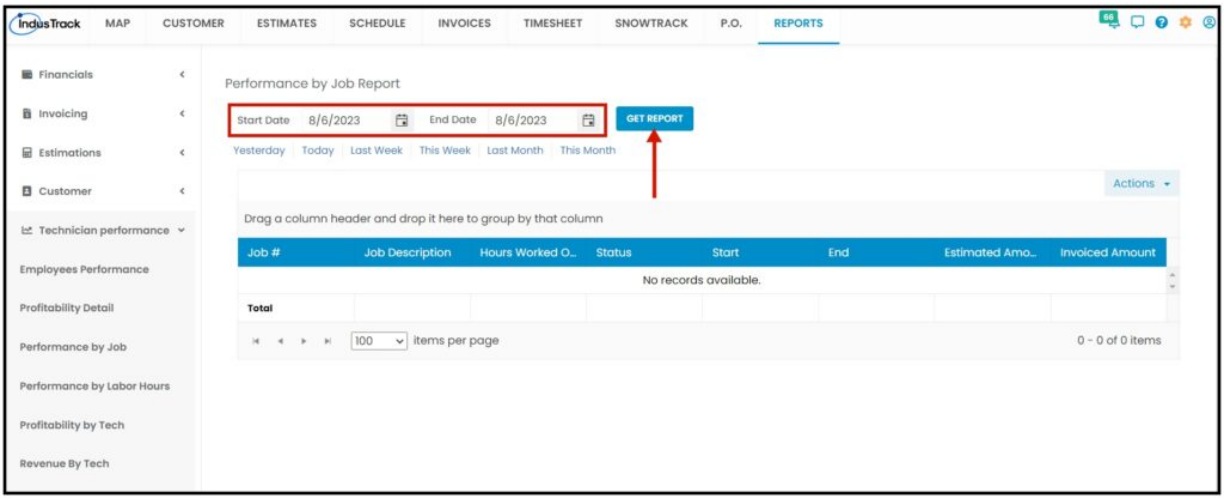
- Job #
- Job Description
- Hours Worked on the Job
- Status
- Start
- End
- Estimated Amount
- Invoiced Amount

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

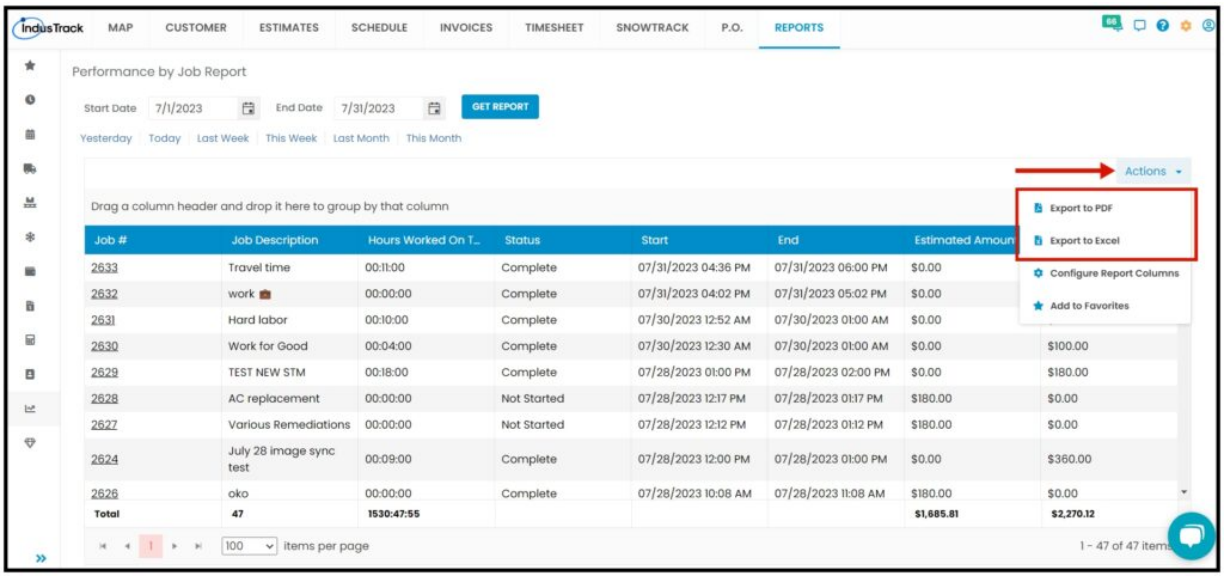


Generate Performance by Job Report

Select Job Start and End Date, then click on GET REPORT.



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



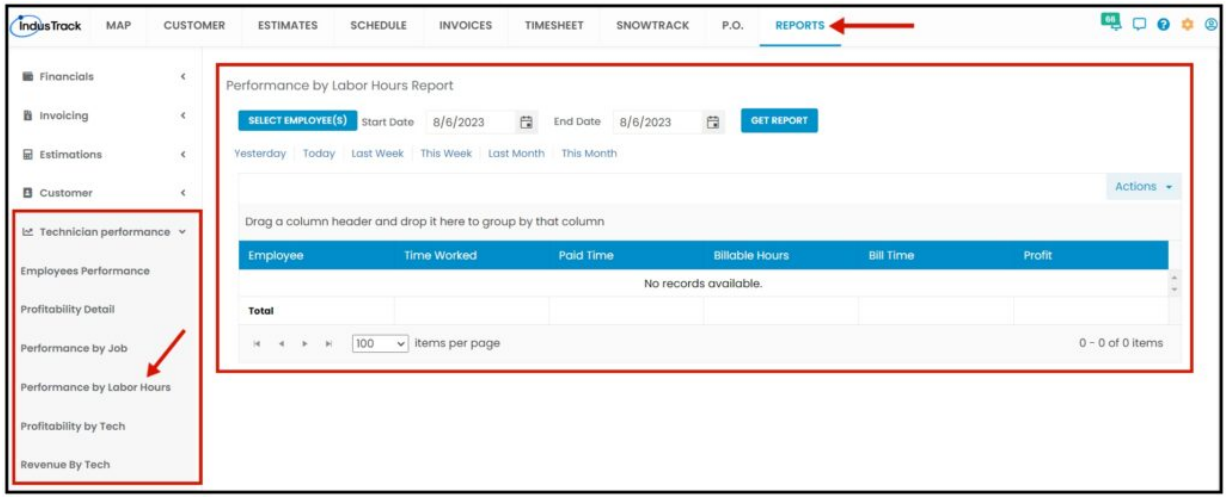
Performance by Labor Hours Report

Generate employee's total worked hours by a specific date, you will also see here more details:

- Employee – Employee Name
- Time Worked
- Paid Time
- Billable Hours

- Bill Time
- Profit

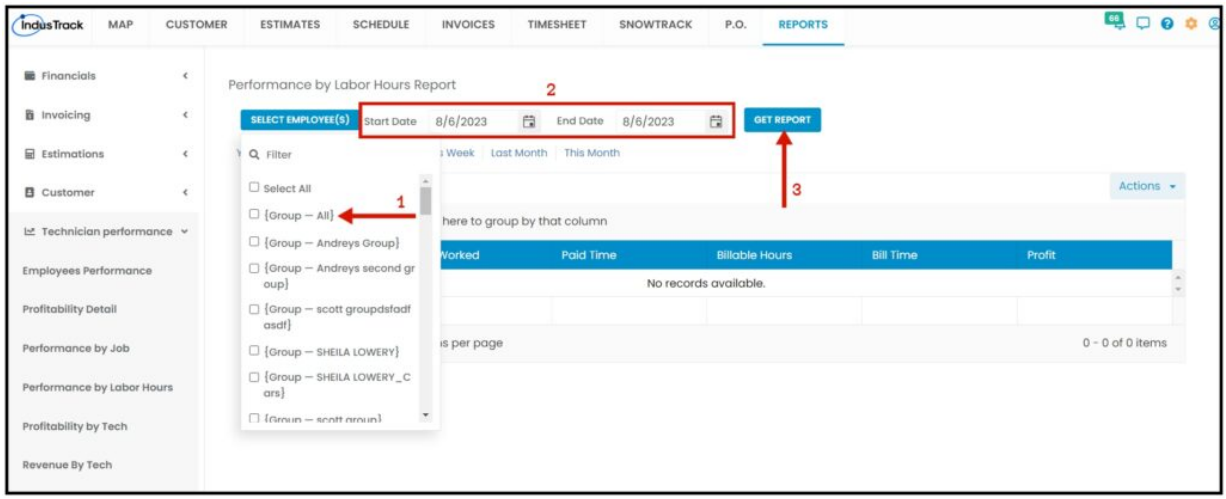
To view the **Performance by Labor Hours Report**, go to **Reports** Menu on the top> Click **Technician Performance**> on the drop-down click **Performance by Labor Hours Report.**



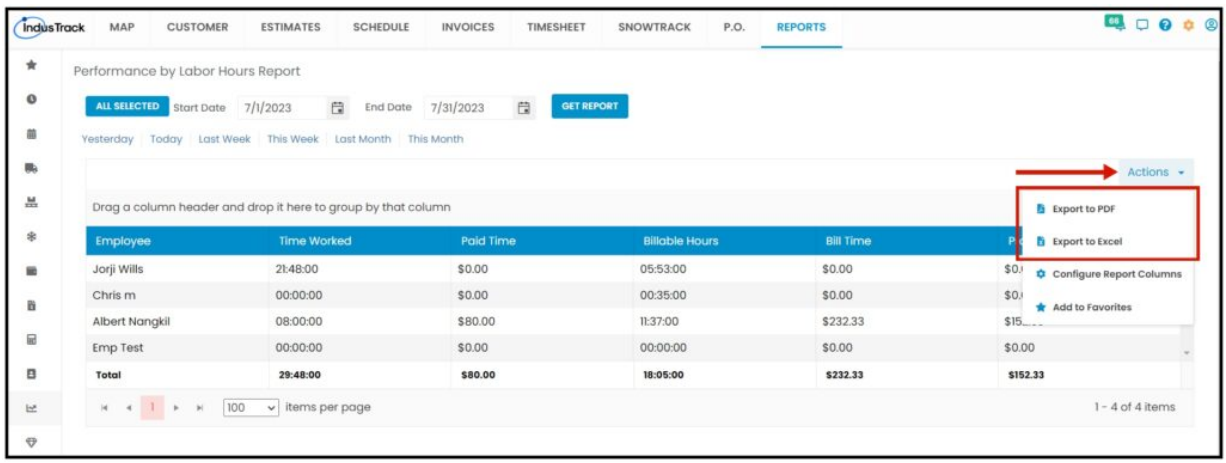
Generate Performance by Labor Hours Report

You can filter the report by the following:

1. Employees –Name/s of employees
    - Click on **Select Employees**
    - 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 **Performance by Labor Hours Report** into **Excel or PDF format** by clicking on the **Actions Button** and selecting **Export to PDF or Export to Excel.**

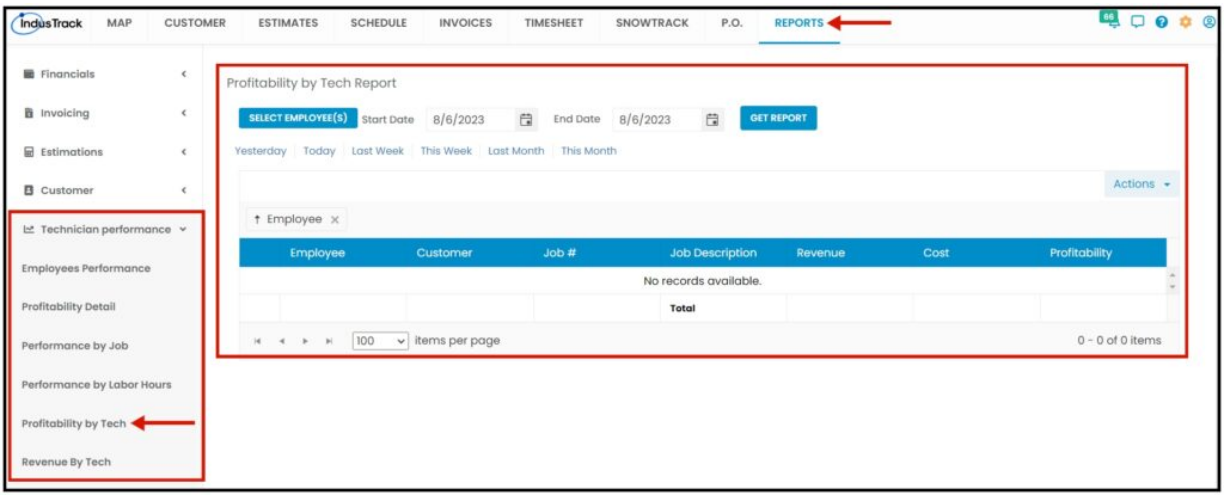


Profitability by Tech Report

In this Report, you will be able to generate all jobs by selected employee/s, the profit of the job/s, and more information.

- Employee
- Customer
- Job #
- Job Description
- Revenue
- Cost
- Profitability

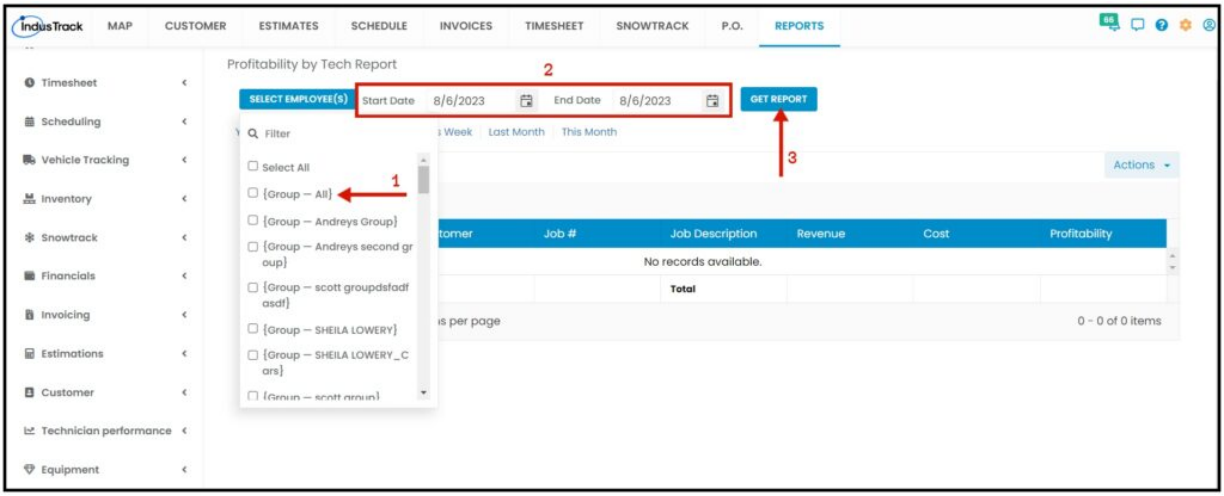
To view the **Profitability by Tech Report**, go to **Reports** Menu on the top> Click **Technician Performance**> on the drop-down click **Profitability by Tech Report.**



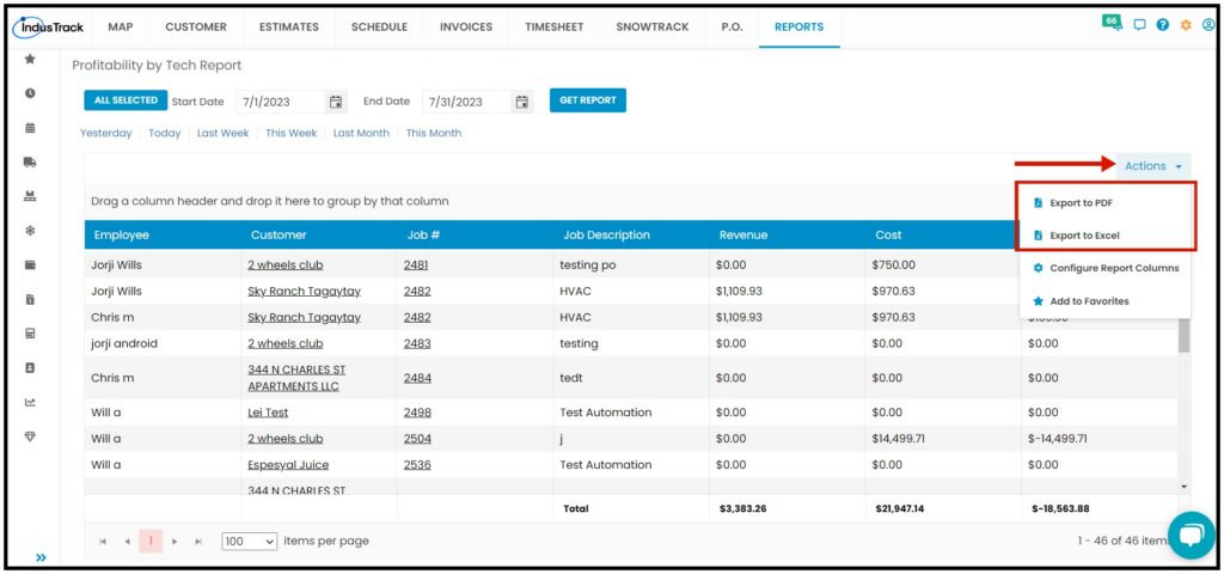
Generate Profitability by Tech Report

You can filter the report by the following:

1. Employees –Name/s of employees
    - Click on **Select Employees**
    - 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 **Profitability by Tech Report** into **Excel or PDF format** by clicking on the **Actions Button** and selecting **Export to PDF or Export to Excel.**


MAP
CUSTOMER
ESTIMATES
SCHEDULE
INVOICES
TIMESHEET
SNOWTRACK
P.O.
REPORTS
Profitability 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
Actions
Export to PDF
Export to Excel
Configure Report Columns
Add to Favorites
Drag a column header and drop it here to group by that column
Employee Customer Job # Job Description Revenue Cost
Jorji Wills 2 wheels club 2481 testing po $0.00 $750.00
Jorji Wills Sky Ranch Tagaytay 2482 HVAC $1,109.93 $970.63
Chris m Sky Ranch Tagaytay 2482 HVAC $1,109.93 $970.63
jorji android 2 wheels club 2483 testing $0.00 $0.00 $0.00
Chris m 344 N CHARLES ST APARTMENTS LLC 2484 tedt $0.00 $0.00 $0.00
Will a Lei Test 2498 Test Automation $0.00 $0.00 $0.00
Will a 2 wheels club 2504 j $0.00 $14,499.71 $-14,499.71
Will a Espesyal Juice 2536 Test Automation $0.00 $0.00 $0.00
344 N CHARLES ST
Total $3,383.26 $21,947.14 $-18,563.88
100 items per page
1 - 46 of 46 items