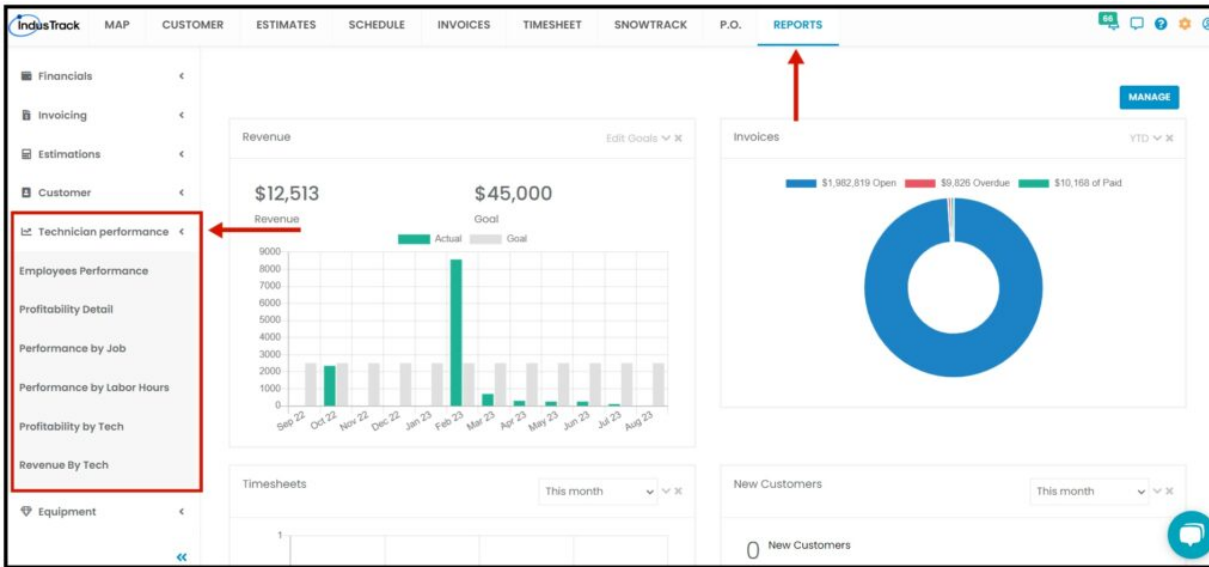


Technician Performance Report

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

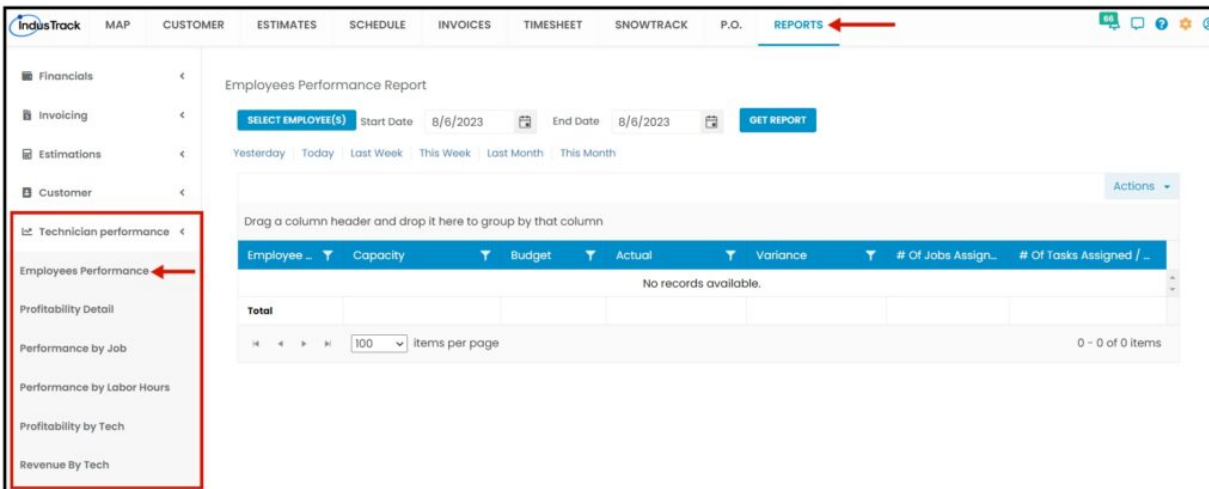


Employees Performance Report

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

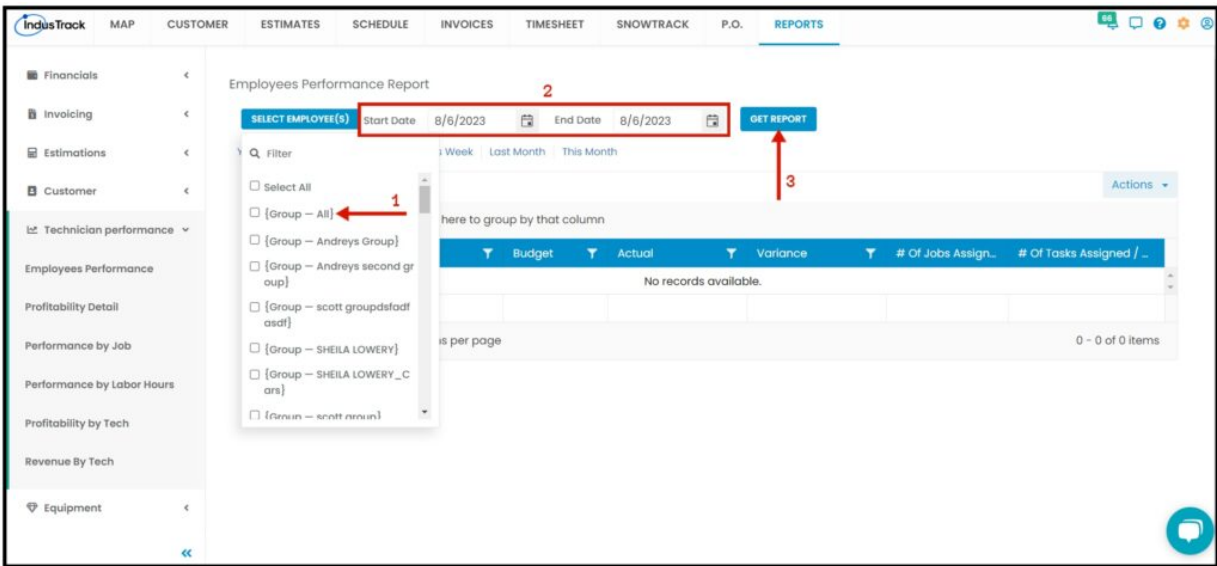
To view the Employees Performance Report, go to **Reports** Menu on the top> Click **Technician Performance**> on the drop-down click **Employees Performance**.



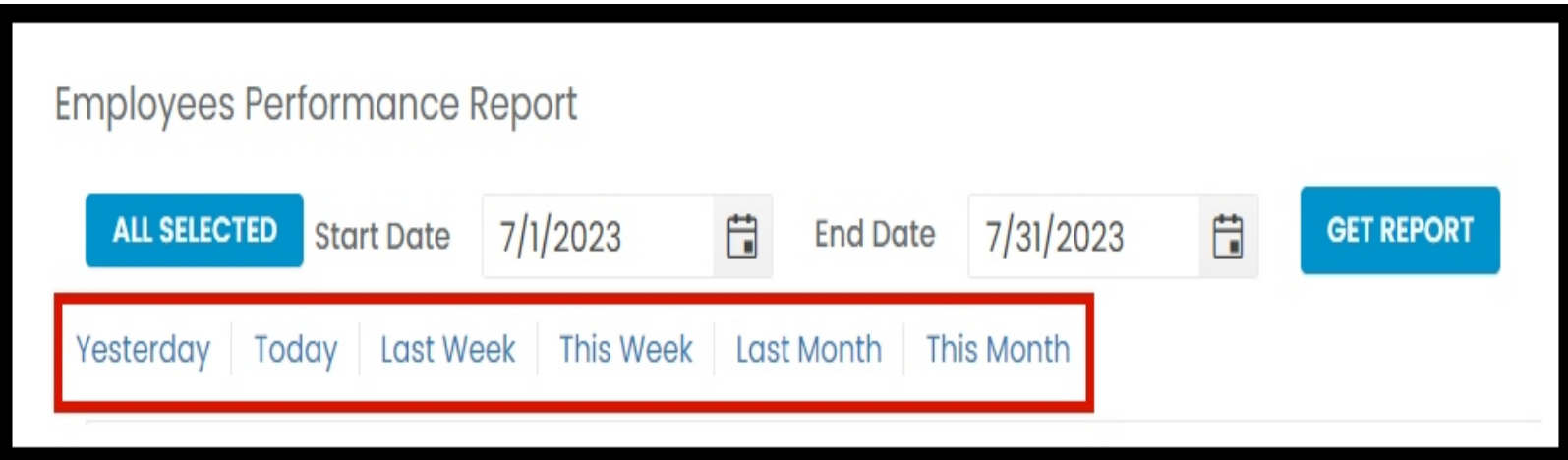
Generate Employees Performance Report

You can filter the report by the following:

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

Employees Performance 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

Employee Na...	Capacity	Budget	Actual	Variance	# Of Jobs Assigned /...	#
Andrey K					0/0	0/0
Emp Test		02:00		02:00	2/1	2/1
Chris m		09:02	379:21		10/9	11/10
Muhammad d		01:00	649:48		1/0	1/0
Albert Nangkil	168:00	01:00		01:00	1/0	1/0
Sean Tan	168:00				0/0	0/0
Jorji Wills		58:00	05:51	52:09	10/7	11/8
Sono Asif					0/0	0/0
Joshua Williams					0/0	0/0
Total	1,563:00	106:37	1,517:20			

1 - 100 of 121 items

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.

Employees Performance 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

Employee Na...	Capacity	Budget	Actual	Variance	# Of Jobs Assigned /...	#
Andrey K					0/0	0/0
Emp Test		02:00		02:00	2/1	2/1
Chris m		09:02	379:21		10/9	11/10
Muhammad d		01:00	649:48		1/0	1/0
Albert Nangkil	168:00	01:00		01:00	1/0	1/0
Sean Tan	168:00				0/0	0/0
Jorji Wills		58:00	05:51	52:09	10/7	11/8
Sono Asif					0/0	0/0
Joshua Williams					0/0	0/0
Total	1,563:00	106:37	1,517:20			

1 - 100 of 121 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.

Employees Performance 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

Employee Na...	Capacity	Budget	Actual	Variance	# Of Jobs Assigned /...	#
Andrey K					0/0	0/0
Emp Test		02:00		02:00	2/1	2/1
Chris m		09:02	379:21		10/9	11/10
Muhammad d		01:00	649:48		1/0	1/0
Albert Nangkil	168:00	01:00		01:00	1/0	1/0
Sean Tan	168:00				0/0	0/0
Jorji Wills		58:00	05:51	52:09	10/7	11/8
Sono Asif					0/0	0/0
Joshua Williams					0/0	0/0
Total	1,563:00	106:37	1,517:20			

1 - 100 of 121 items

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

Edit Columns Settings

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

Add to Favorites

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

The screenshot shows the 'Employees Performance Report' interface. At the top, there are navigation tabs: MAP, CUSTOMER, ESTIMATES, SCHEDULE, INVOICES, TIMESHEET, SNOWTRACK, P.O., and REPORTS. Below the tabs, 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 shows 'Yesterday', 'Today', 'Last Week', 'This Week', 'Last Month', and 'This Month'. The main area contains a table with columns: Employee Na..., Capacity, Budget, Actual, Variance, # Of Jobs Assigned /..., and # C... The table lists several employees and their performance metrics. An 'Actions' dropdown menu is open on the right side of the table, with options: 'Export to PDF', 'Export to Excel', 'Configure Report Columns', and 'Add to Favorites'. The 'Add to Favorites' option is highlighted with a red box. A red arrow points to the 'Actions' dropdown menu. At the bottom, there is a pagination control showing '1 2' and '100 items per page', and a status bar indicating '1 - 100 of 121 items'.

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.

Employees Performance 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

Employee ...	Capacity	Budget	Actual	Variance	# Of Jobs Assign...	# Of Tasks Assigned / ...
Andrey K					0/0	0/0
Emp Test		02:00		02:00	2/1	2/1
Chris m		09:02	379:32		10/9	11/10
Muhammad d		01:00	649:59		1/0	1/0
Albert Nangkil	168:00	01:00		01:00	1/0	1/0
Sean Tan	168:00				0/0	0/0
Jorji Willis		58:00	05:51	52:09	10/7	11/8
Sono Asif					0/0	0/0
Joshua Williams					0/0	0/0
Dunn Marie					0/0	0/0
Total	1,583:00	106:37	1,517:53			

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.

Profitability Detail Report

SELECT EMPLOYEE(S) Start Date 8/6/2023 End Date 8/6/2023 GET REPORT

Yesterday Today Last Week This Week Last Month This Month

Empl Name x

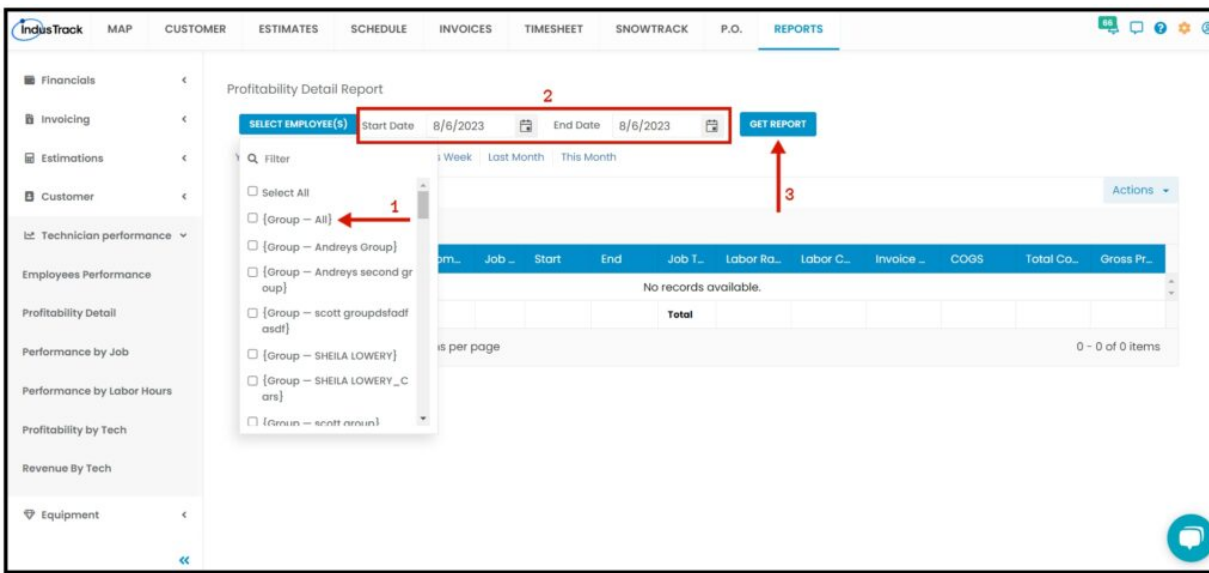
Date	Empl Na...	Custom...	Job ...	Start	End	Job T...	Labor Ra...	Labor C...	Invoice ...	COGS	Total Co...	Gross Pr...
No records available.												
Total												

Generate Profitability Detail Report

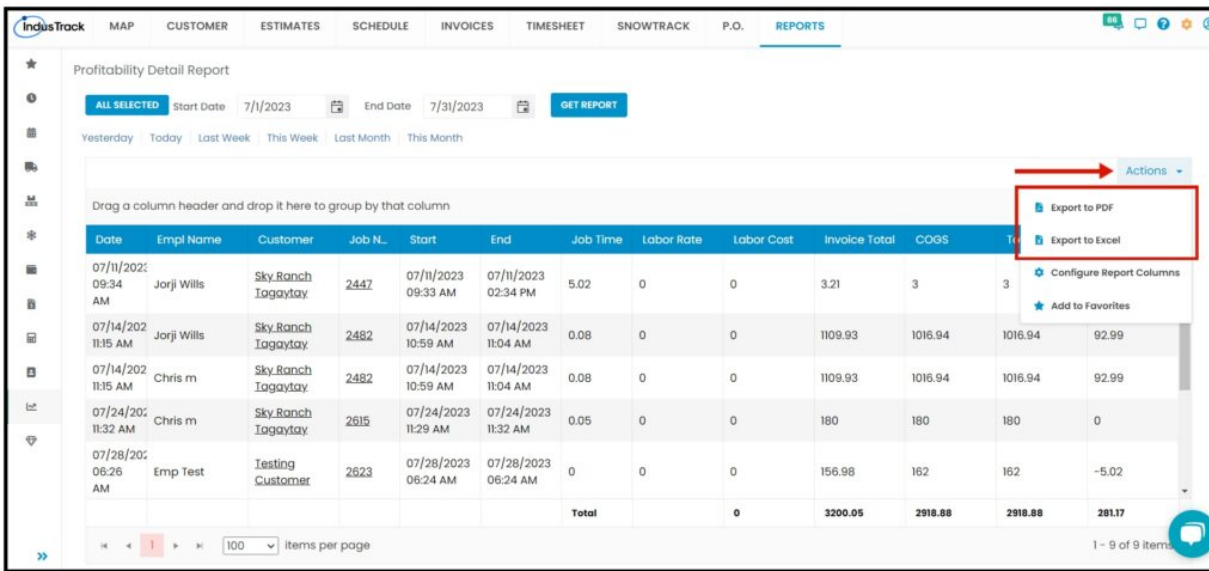
You can filter the report by the following:

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

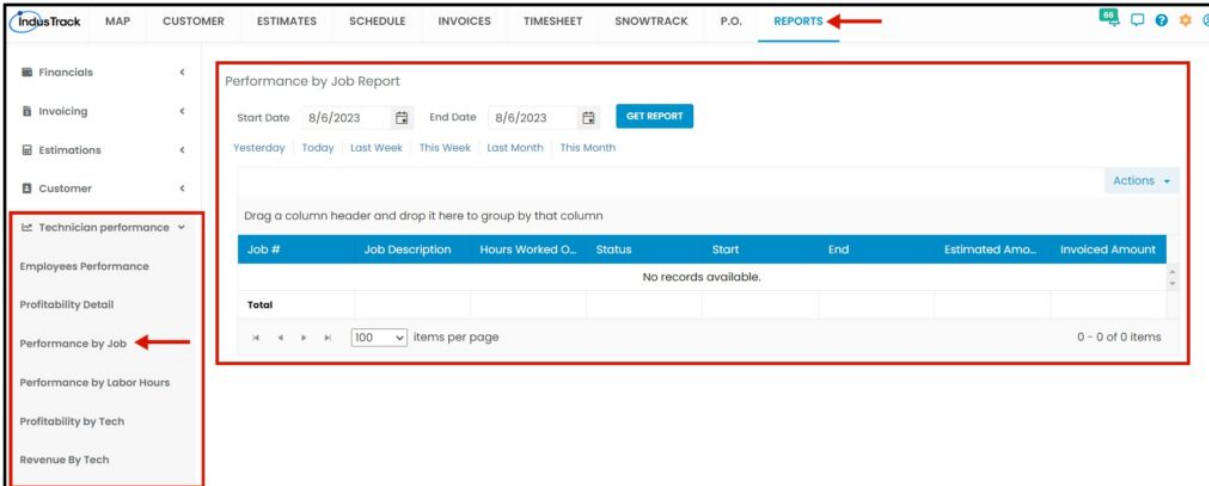


Performance by Job Report

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:

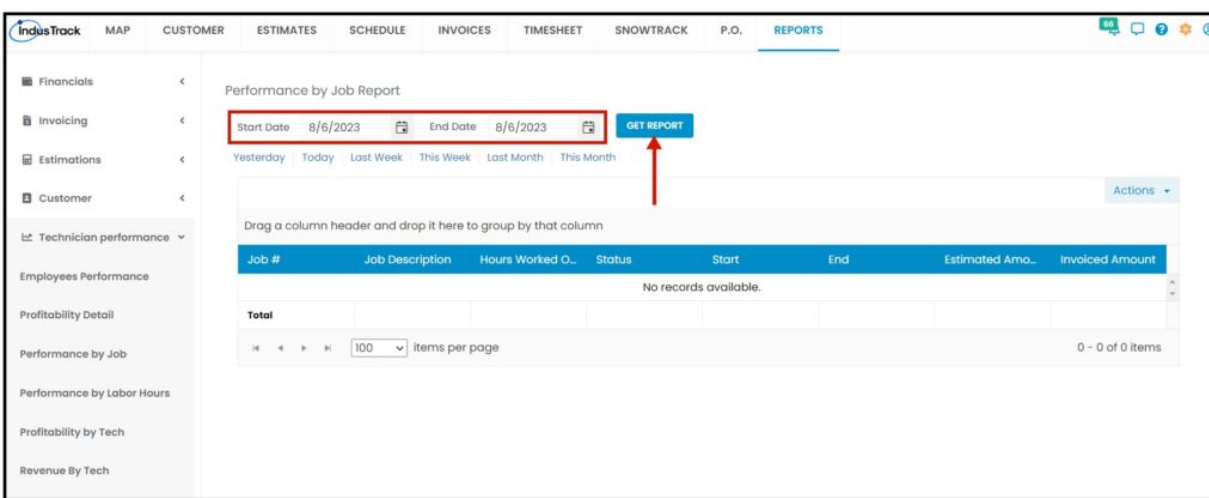
- Job #
- Job Description
- Hours Worked on the Job
- Status
- Start
- End
- Estimated Amount
- Invoiced Amount

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**.

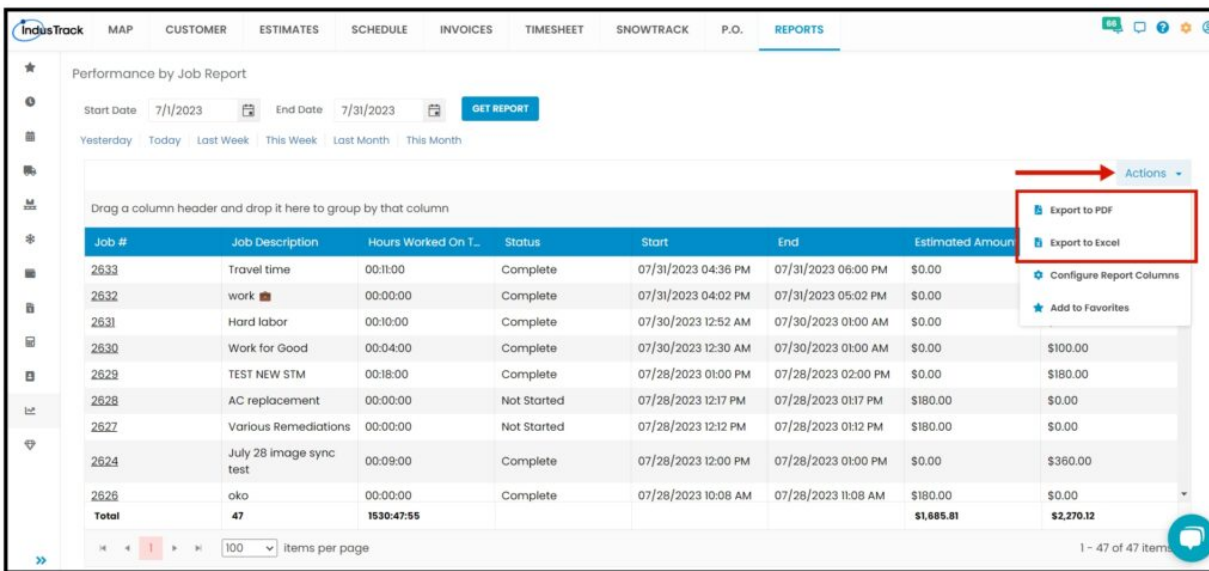


Generate Performance by Job Report

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**.



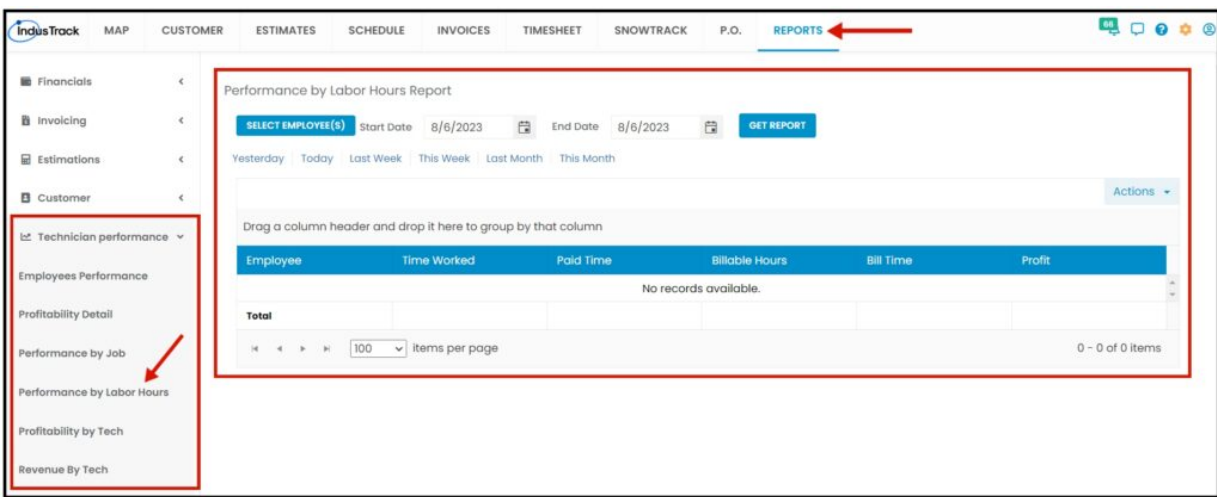
Performance by Labor Hours Report

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

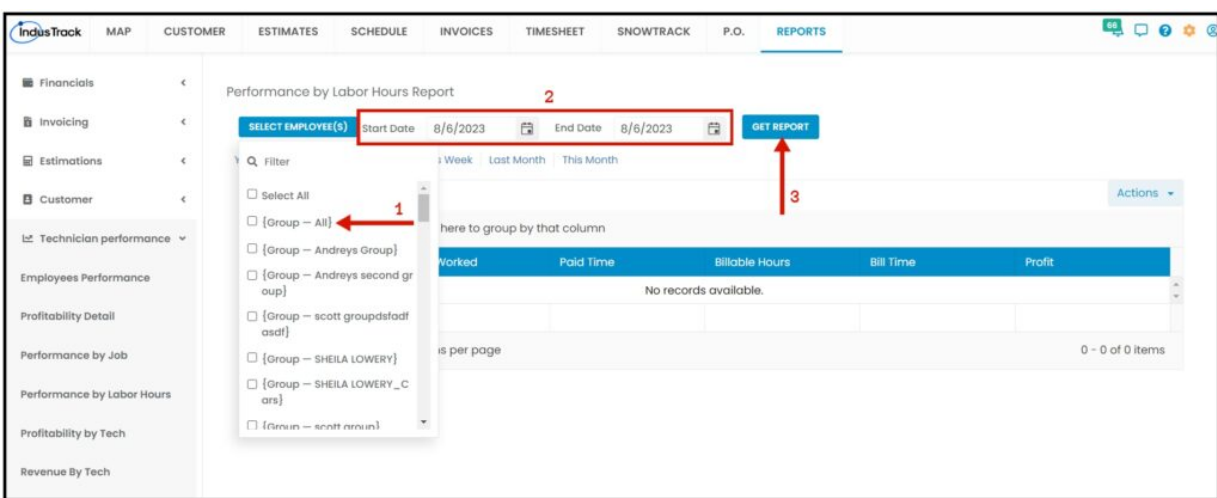
To view the **Performance by Labor Hours Report**, go to **Reports** Menu on the top> Click **Technician Performance**> on the drop-down click **Performance by Labor Hours Report**.



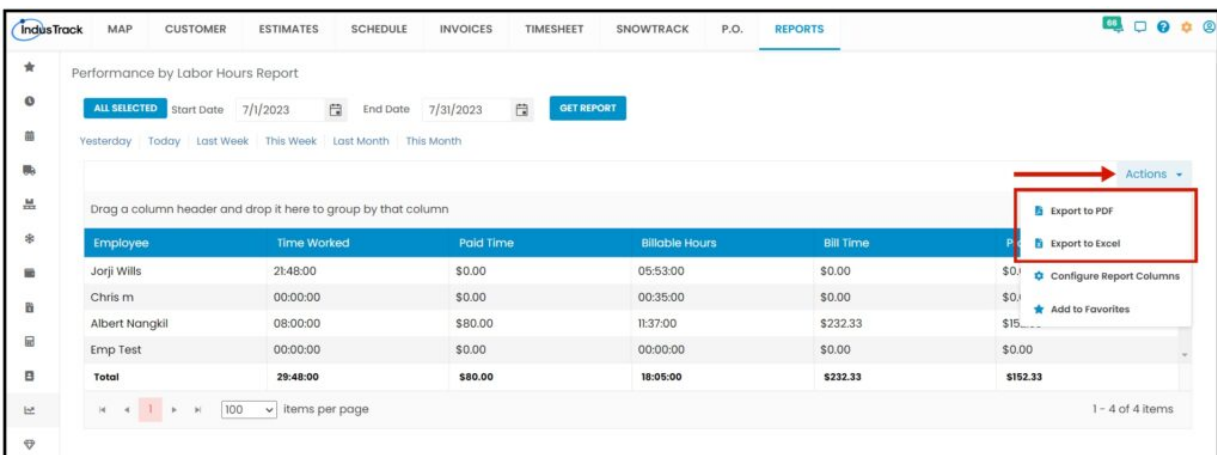
Generate Performance by Labor Hours Report

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**.

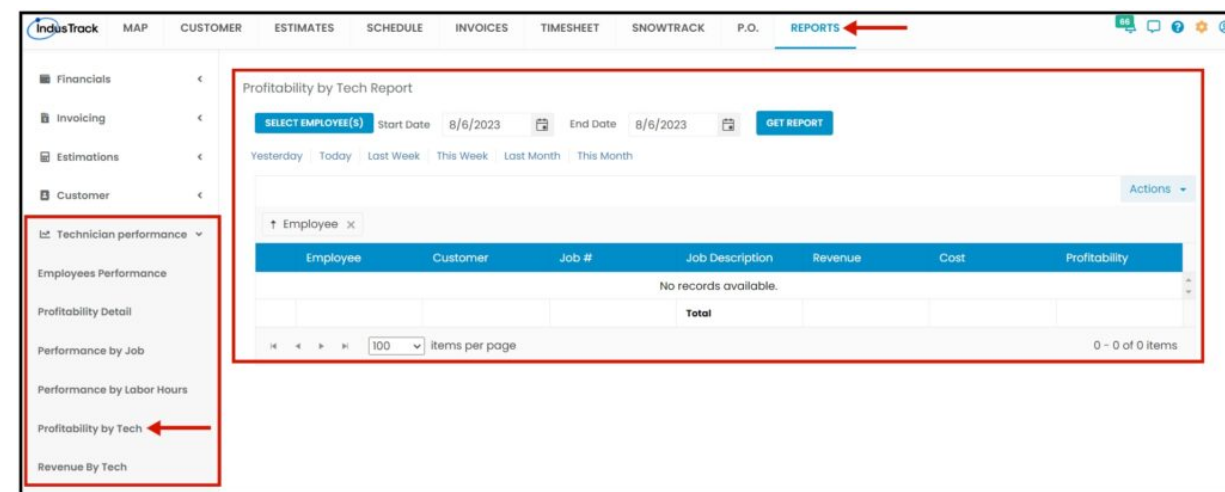


Profitability by Tech Report

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

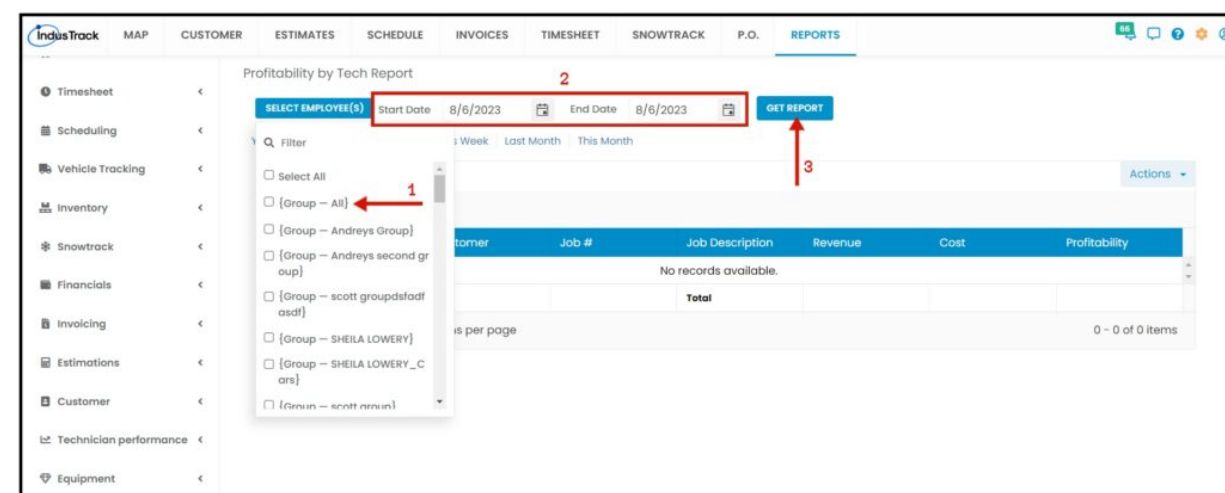
To view the **Profitability by Tech Report**, go to **Reports** Menu on the top> Click **Technician Performance**> on the drop-down click **Profitability by Tech Report**.



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**.

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](#)

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 APARIMENTS 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

Actions

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

