



Service **Autopilot**[™]

REPORT CENTER

USER GUIDE

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About the Report Center

Service Autopilot's Report Center is a one-stop center for reports and analytics about your company. Depending on your access level, you can create analyses, dashboards, and reports, as well as scheduling reports to email.

Access to the Report Center

Service Autopilot's Report Center is available to Pro and Pro Plus members, and it requires only minimal setup.

To get started, go to **Reports > Report Center**.

SA users who have access to the Report Center need specific rights to manage it. See "Enable User Rights for Report Center" for information.

Note: SA Legacy Reports are no Longer Supported

SA's original reports, called Legacy Reports, are still used by some of our Members who have been with us for a long time. We've kept these reports available for the convenience of those who might still use them.

However, just as most old versions of computer software are eventually phased out, the Legacy reports are titled "Legacy" because they are no longer supported. Instead, we have shifted our efforts to support the new Report Center where you can create any number of customized reports specifically for your business needs.

This means that you still might be able to run the reports, but we are unable to address questions about their calculations and any errors or issues that may arise with those reports.

We encourage you to try out the many useful pre-built Reports in the Report Center. Check out the reports described in this guide, on in the Knowledge Base at **HELP > Knowledge Base > Reports**.

"Knowledge is power."

--Sir Francis Bacon

Enable User Rights for Report Center

There are three options in **User Roles and Rights** that let you control who can see or manage reports. The three rights have pre-defined settings, but you can change them if you prefer different restrictions for any role.

Follow these steps to change the settings:

1. Go to **Settings > User Roles & Rights**.
2. Select a role name. The Edit role overlay appears.
3. On the “Home” tab, check or uncheck any of these checkboxes in the **Report Access** column:
 - **SA Dashboard** – access to SA’s preset dashboards and its components
 - **View Report Center** – access to the Report Center and shared reports
 - **Manage Report Center** (Pro and Pro Plus Members only) – permissions for creating and managing reports
4. Click **Save**.
5. Repeat this for each user role in your company.

Edit - Owner

Name

Description

Select all items on current tab

| Home | CRM | Scheduling | Accounting | Mobile |
|---|---|--|--|--------|
| <input checked="" type="checkbox"/> Settings Access | <input checked="" type="checkbox"/> Report Access | <input checked="" type="checkbox"/> Other Access | <input checked="" type="checkbox"/> Marketplace Access | |
| <input checked="" type="checkbox"/> Account Settings | <input checked="" type="checkbox"/> SA Dashboard | <input checked="" type="checkbox"/> Allow Roles Access | <input checked="" type="checkbox"/> View Marketplace | |
| <input checked="" type="checkbox"/> Company Settings | <input checked="" type="checkbox"/> Company Reports | <input checked="" type="checkbox"/> Websites | | |
| <input checked="" type="checkbox"/> Home Settings | <input checked="" type="checkbox"/> CRM Reports | <input checked="" type="checkbox"/> Export Lists | | |
| <input checked="" type="checkbox"/> CRM Settings | <input checked="" type="checkbox"/> Scheduling Reports | <input checked="" type="checkbox"/> Delete Export | | |
| <input checked="" type="checkbox"/> Scheduling Settings | <input checked="" type="checkbox"/> Accounting Reports | <input checked="" type="checkbox"/> QuickBooks Resync | | |
| <input checked="" type="checkbox"/> Accounting Settings | <input checked="" type="checkbox"/> Sales Manager Reports | <input checked="" type="checkbox"/> Delete Webpages | | |
| | <input checked="" type="checkbox"/> Sales Rep Reports | <input checked="" type="checkbox"/> Bulk Edit Products | | |
| | <input checked="" type="checkbox"/> View Report Center | <input checked="" type="checkbox"/> Estimate Accepted Alert | | |
| | <input checked="" type="checkbox"/> Manage Report Center | <input checked="" type="checkbox"/> Imports | | |
| | | <input checked="" type="checkbox"/> Delete Wiki Pages | | |
| | | <input checked="" type="checkbox"/> Restore Deleted Wiki Pages | | |

or [Cancel](#)

Assign Permissions for CRM, Scheduling, and Accounting Reports

You might also need to assign permissions for reports in other categories. You can do so by selecting the check boxes for these reports on the **CRM**, **Scheduling**, and **Accounting** tabs.

Name

Description

Select all items on current tab

Home
CRM
Scheduling
Accounting
Mobile

| | | | | |
|--|---|---|---|--|
| <p><input checked="" type="checkbox"/> <u>Client Access</u></p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Client List <input checked="" type="checkbox"/> Activate/Deactivate <input checked="" type="checkbox"/> Add Client <input checked="" type="checkbox"/> Allow Edit <input checked="" type="checkbox"/> Allow Delete <input checked="" type="checkbox"/> Bulk Edit <input checked="" type="checkbox"/> Bulk Schedule <input checked="" type="checkbox"/> Bulk Create <input checked="" type="checkbox"/> Marketing <input checked="" type="checkbox"/> Add Contract <input checked="" type="checkbox"/> Payment Alerts | <p><input type="checkbox"/> <u>Client Access (cont.)</u></p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Client Portal Ticket Alerts <input checked="" type="checkbox"/> View Balance <input checked="" type="checkbox"/> View Touchpoints <input checked="" type="checkbox"/> View History <input checked="" type="checkbox"/> View Notes <input checked="" type="checkbox"/> View Contacts <input checked="" type="checkbox"/> View Billing <input checked="" type="checkbox"/> View Credit Card #'s <input checked="" type="checkbox"/> Copy Master Property Credit Card <input checked="" type="checkbox"/> Reset Client Portal Password | <p><input checked="" type="checkbox"/> <u>Lead Access</u></p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Lead List <input checked="" type="checkbox"/> Allow Edit <input checked="" type="checkbox"/> Allow Delete <input checked="" type="checkbox"/> Bulk Edit <input checked="" type="checkbox"/> Bulk Create <input checked="" type="checkbox"/> Estimates <input checked="" type="checkbox"/> Add Lead <input checked="" type="checkbox"/> Convert/Close | <p><input checked="" type="checkbox"/> <u>CRM Reports</u></p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Client Balance <input checked="" type="checkbox"/> Client Contracts <input checked="" type="checkbox"/> Client Referral <input checked="" type="checkbox"/> New Clients Report <input checked="" type="checkbox"/> New Client Count Report <input checked="" type="checkbox"/> Cancellation Count Report <input checked="" type="checkbox"/> Clients Report by Completed Jobs <input checked="" type="checkbox"/> Client Method of Payment <input checked="" type="checkbox"/> Terminations Report <input checked="" type="checkbox"/> Client Contact List <input checked="" type="checkbox"/> Client Phone List <input checked="" type="checkbox"/> Client Timeline Report <input checked="" type="checkbox"/> Client Source Campaigns | <p><input checked="" type="checkbox"/> <u>CRM Reports (cont.)</u></p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> QuickBooks Comparison <input checked="" type="checkbox"/> Sales Summary by Source <input checked="" type="checkbox"/> Closed Leads Summary <input checked="" type="checkbox"/> Lead Aging Summary <input checked="" type="checkbox"/> New Leads Report <input checked="" type="checkbox"/> Estimates by Stage <input checked="" type="checkbox"/> Won Estimates by Service <input checked="" type="checkbox"/> Won Estimates Service Products <input checked="" type="checkbox"/> Won Estimates Service Value <input checked="" type="checkbox"/> Bounced Emails <input checked="" type="checkbox"/> Spam Emails <input checked="" type="checkbox"/> Forms Summary <input checked="" type="checkbox"/> Company Scorecard |
|--|---|---|---|--|

Report Center Menu Options

The Report Center's various menu options serve specific purposes. The options you can see depend on your Membership level, as well as user rights.

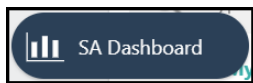
Home (Pro and Pro Plus Membership Only)



Click the Home icon at the top left of the menu to return to the Home page. Once you create analyses, dashboards, and reports, they'll appear on the Home page in the "My Items" folder.

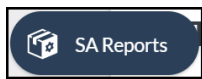
Any project in the Report Center will be saved automatically and listed on this page. You can also schedule or share them from this page.

SA Dashboard (All Membership Levels)



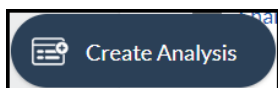
The SA Dashboard icon is available to all members. This dashboard shows all existing visuals (such as charts, gauges, and tables) provided by Service Autopilot. Within this dashboard, you will find six different tabs.

SA Reports (All Membership Levels)



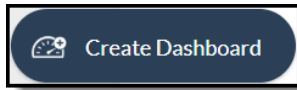
The SA Reports page lists all existing Service Autopilot reports. The report screen is divided by section, name of report, and its description. These are standard reports that are available to all members.

Create Analysis (Pro and Pro Plus Membership Only)



The Analysis Grid lets you create and visualize your data through tables and charts. You can perform a wide range of activities with this tool, including sorting, grouping, and filtering.

Create Dashboard (Pro and Pro Plus Membership Only)



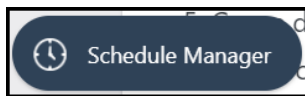
Dashboards are collections of live visual elements (such as pie charts and graphs). You can create these from your Visual Gallery, and group them to your liking. The visuals are placed into dashboard panels. When you create a new dashboard or change tab settings, the Visual Gallery will display. You can search and sort all your visuals here.

Create Report (Pro and Pro Plus Membership Only)

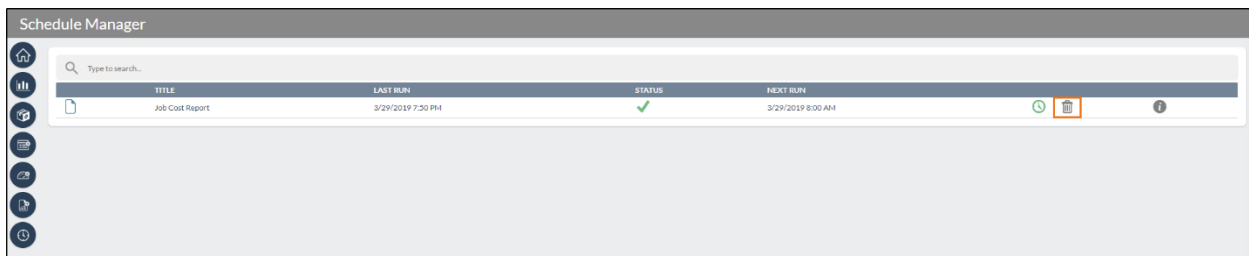


Create a report to place your visuals and other content into a customized layout, suitable for browsing, exporting as a PDF, and scheduling for email distribution.

Schedule Manager (Pro Plus Members Only)



Click this to see all scheduled reports where you can review, change, and delete them.

A screenshot of the "Schedule Manager" interface. It features a search bar at the top with the placeholder text "Type to search...". Below the search bar is a table with the following columns: "TITLE", "LAST RUN", "STATUS", and "NEXT RUN". The table contains one row with the following data: "Job Cost Report", "3/29/2019 7:30 PM", a green checkmark, and "3/29/2019 8:00 AM". To the right of the table row are three icons: a clock, a trash can, and an information icon. On the left side of the interface is a vertical sidebar with several circular icons representing different navigation options.

| TITLE | LAST RUN | STATUS | NEXT RUN |
|-----------------|-------------------|--------|-------------------|
| Job Cost Report | 3/29/2019 7:30 PM | ✓ | 3/29/2019 8:00 AM |


About the Report Center Dashboard

All SA users have a basic Report Center Dashboard. Pro and Pro Plus Members can also customize their Dashboard and create a custom analysis.

The Dashboard is a place where you can view visual representations of Report data at a glance. The tabs and panels are customizable so you can control exactly what information you want to see.

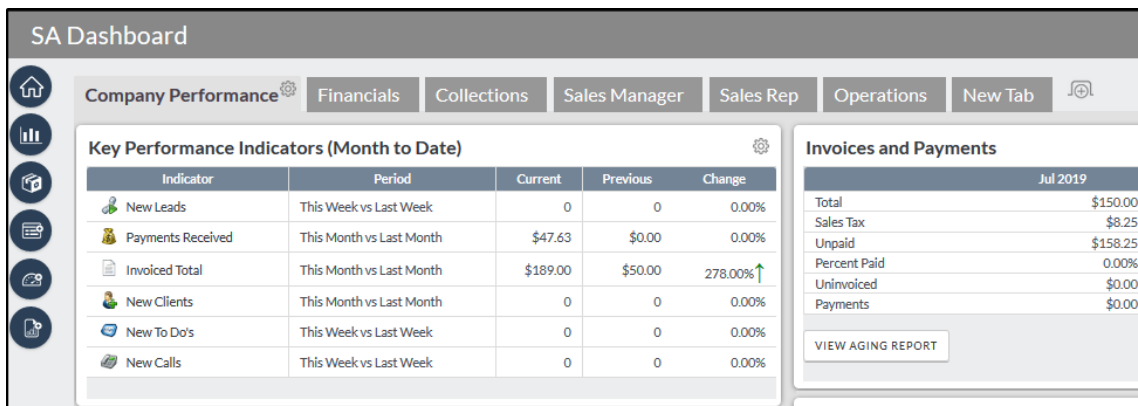
See the *Dashboard User Guide* for information on the Dashboard and available components.

Open the Report Center Dashboard

Go to **Reports > Report Center** and click the **SA Dashboard** icon: 

The SA Dashboard menu lets you access preset **Dashboard Panels** including visual elements from existing reports. When you create a new dashboard or change tab settings, the Visual Gallery will display. You can search and sort all your visuals here.

On your Dashboard screen, you'll see all types of useful features and tracking tools. For example:




| Indicator | Period | Current | Previous | Change |
|-------------------|--------------------------|----------|----------|-----------|
| New Leads | This Week vs Last Week | 0 | 0 | 0.00% |
| Payments Received | This Month vs Last Month | \$47.63 | \$0.00 | 0.00% |
| Invoiced Total | This Month vs Last Month | \$189.00 | \$50.00 | 278.00% ↑ |
| New Clients | This Month vs Last Month | 0 | 0 | 0.00% |
| New To Do's | This Week vs Last Week | 0 | 0 | 0.00% |
| New Calls | This Week vs Last Week | 0 | 0 | 0.00% |


| Invoices and Payments | | Jul 2019 |
|-----------------------|--|----------|
| Total | | \$150.00 |
| Sales Tax | | \$8.25 |
| Unpaid | | \$158.25 |
| Percent Paid | | 0.00% |
| Uninvoiced | | \$0.00 |
| Payments | | \$0.00 |







On this screen, you can see different tabs for information about your company, revenue, and Clients. You can add additional tabs for any category you would like. You can also re-name the existing tabs or add and remove panels. Many of the panels allow you to click on them for more detailed information.

The SA Dashboard contains these elements:

- **Dashboard Panel Tabs** – navigate through the various tabs to glance at relevant report visuals. In the screenshot above there are the tabs across the tops, such as "Company Performance" and "Financials".
- **Tab Settings Icon** – this is the cog icon at the top-right of each Dashboard Panel Tab. Choose from different setting options, such as changing layout or renaming tab.
- **Visual Settings Icon** – this is the cog icon at the top-right of each Dashboard panel. Choose to rename or remove report visual from dashboard panel:

Company Performance  Financials Collections Sales Manager Sales f

Key Performance Indicators (Month to Date) 

| Indicator | Period | Current | Previous | Change |
|---|--------------------------|---------|----------|--------|
|  New Leads | This Week vs Last Week | 0 | 0 | 0.00% |
|  Payments Received | This Month vs Last Month | \$0.00 | \$0.00 | 0.00% |
|  Invoiced Total | This Month vs Last Month | \$50.00 | \$50.00 | 0.00% |
|  New Clients | This Month vs Last Month | 0 | 0 | 0.00% |
|  New To Do's | This Week vs Last Week | 0 | 0 | 0.00% |
|  New Calls | This Week vs Last Week | 0 | 0 | 0.00% |

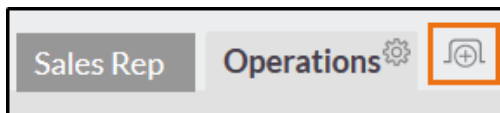
Invoice

Unpai
Perce
Uninv
Payme

VIEW

Context Menu: Rename, Remove

New Tab Action Button – located at the far right of all existing tabs, use this to create a new dashboard panel tab and add content from the Visual Gallery:



Overview of Report Center Analyses

The **Create Analysis** menu in the Report Center lets you see your data in tables and charts. When you're creating an analysis, you have options that range from adding custom formulas to choosing charts and graphs.

Note: When you're creating an analysis, the Autosave function saves any changes automatically.

The Analysis Grid

The Analysis Grid displays a set of tabs and buttons that let you manipulate its data and visual elements. When you click a tab, a configuration panel for that feature appears. You can hide this by clicking it again.



Duplicate Analysis



Use this feature to duplicate an analysis or report. You will get a confirmation message. Once confirmed, a copy of the analysis or report appears under the "My Items" folder on the Home screen.

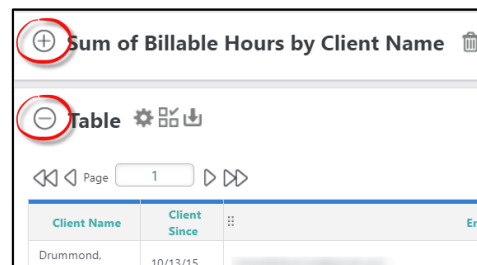
Undo/Redo



Click this to undo or redo an action from the Analysis Grid. This icon disappears when you click **OK**.

Visualization Panels

The Visualization Panels contain either a table, a crosstab table, or a chart. Click "+" or "-" to collapse or expand them. You can rearrange their order by clicking near the top of a pane and dragging it up or down.



Panel Options

Each Visualization Panel has three options:



- Show/Hide Options
- Add to Visual Gallery
- Export (Excel, CSV, or PDF)

Data



The **Data** tab lets you select data types from a dropdown list. As soon as you select a data type, a data table shows a set of columns with a selection of check boxes. You can uncheck any box for a column you don't want to include in your analysis work.

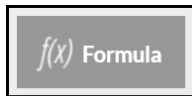
With the Report Center, you can “join” different data tables by continuing to add data types onto your analysis report. A join combines two sets of data to produce a single data set. Different types of joins produce different results.

Note: Not every data type can be linked together. For example, you cannot pull invoice data and job data.

When you select additional data types that join tables, you'll see a color-coding scheme applied to the table that indicates where the data came from. Once you've selected data, all the other tabs or buttons at the top of the Analysis Grid become enabled.

Click the **Data** tab or button to hide the data selection controls.

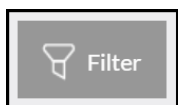
Formulas



The **Formula** tab lets you add calculated columns to the data. Add new columns at the right side of the table or relocate them by dragging them.

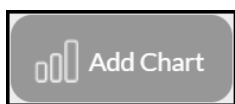
Click [here](#) for instructions on how to use this feature.

Filters



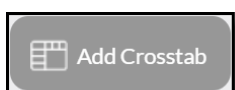
The **Filter** tab lets you specify criteria to refine the data in the analysis. You can limit the number of rows and the values that display. For example, you might specify a date range or service type.

Charts



The **Add Chart** button lets you create charts and gauges in relation to the data tables. A separate Chart panel with its own configuration area will display. Any charts or gauges added on this page will appear as another [visualization panel](#).

Crosstabs



The **Add Crosstab** button lets you create a crosstab, which compares three types of data in a chart.

Managing the Report Center

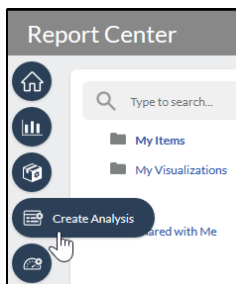
You can manage the Report Center after enabling **Manage Report Center** on the User Roles and Rights settings page. This section outlines common actions you can do in the Report Center.

Create a Custom Analysis

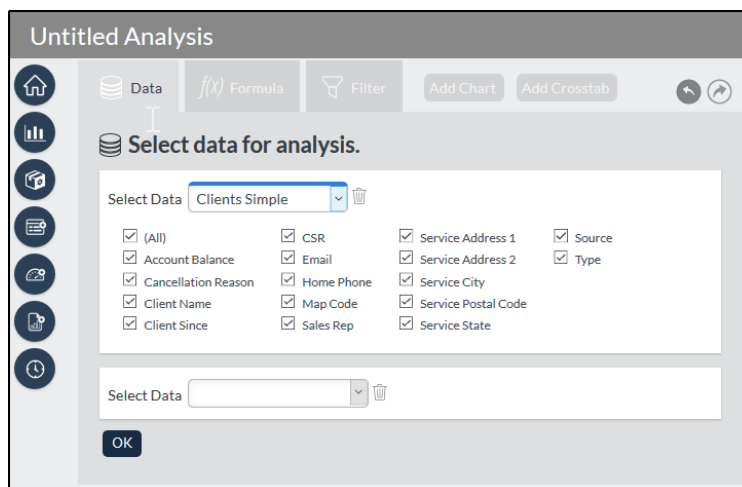
An analysis is not a report. It is the data you can use for a report. Think of the analysis as the patty in your report hamburger. You can put in as many analyses as you want.

Here are the basic steps to create an analysis.

1. Go to **Reports > Report Center**
2. Click **Create Analysis**.



3. **Select Data** from the dropdown list and click **OK** to generate a table.

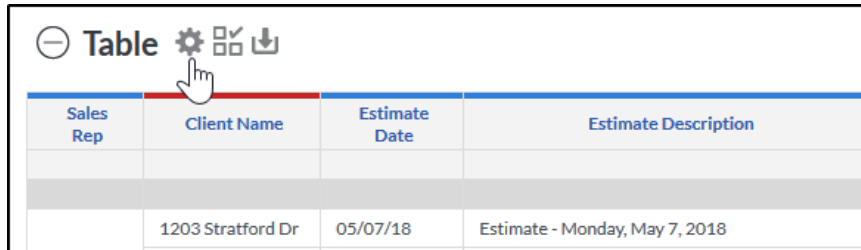


4. From this point, there are numerous additional directions for your analysis to go. An analysis can be as simple as a table if this accomplishes your goal.

Optionally, you can also [Add a Formula to an Analysis Table](#), [Add a Chart to an Analysis Table](#), and [Add a Crosstab to an Analysis Table](#).

Modify a Table

You can customize an analysis table by clicking the gear icon at the top of the table.

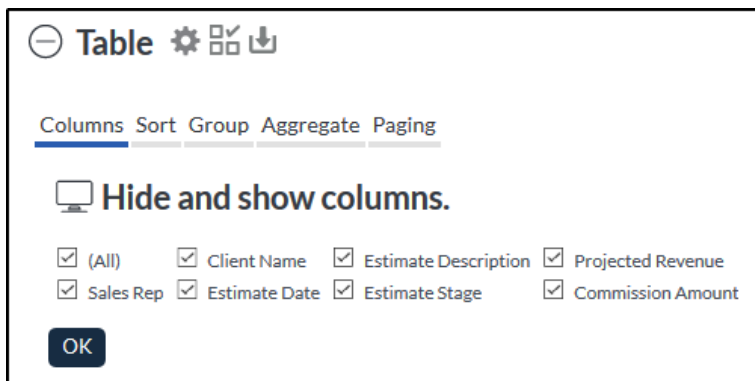


The screenshot shows a table with a header row and one data row. The header row has columns: Sales Rep, Client Name, Estimate Date, and Estimate Description. The data row has values: 1203 Stratford Dr, 05/07/18, and Estimate - Monday, May 7, 2018. A gear icon is highlighted with a mouse cursor at the top of the table.

| Sales Rep | Client Name | Estimate Date | Estimate Description |
|-----------|-------------------|---------------|--------------------------------|
| | 1203 Stratford Dr | 05/07/18 | Estimate - Monday, May 7, 2018 |

You can make changes to the analysis table in the following ways:

- **Hide or Show Columns** – select from a list of columns to hide or show:



The screenshot shows a dialog box titled "Table" with a gear icon. It has tabs for "Columns", "Sort", "Group", "Aggregate", and "Paging". The "Columns" tab is selected. The dialog box contains the text "Hide and show columns." and a list of checkboxes for columns to show or hide. The "OK" button is at the bottom.

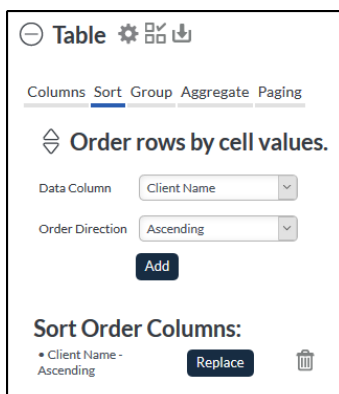
Columns Sort Group Aggregate Paging

Hide and show columns.

(All) Client Name Estimate Description Projected Revenue
 Sales Rep Estimate Date Estimate Stage Commission Amount

OK

- **Sort** – sort a row's cell values (**Data Column**) in ascending or descending order (**Order Direction**) and replace or remove column order one it's been ordered (**Sort Order Columns**):



The screenshot shows a dialog box titled "Table" with a gear icon. It has tabs for "Columns", "Sort", "Group", "Aggregate", and "Paging". The "Sort" tab is selected. The dialog box contains the text "Order rows by cell values." and a form for selecting a data column and order direction. The "Add" button is at the bottom. Below the form, there is a section for "Sort Order Columns" with a list of columns and a "Replace" button.

Columns Sort Group Aggregate Paging

Order rows by cell values.

Data Column: Client Name
Order Direction: Ascending

Add

Sort Order Columns:
• Client Name - Ascending

Replace

- **Group** – organize rows with grouping and sub-grouping (**Grouping Column**), replace or remove groups ("**Groups**"), and exclude details rows ("**Detail Rows**"):

The screenshot shows the 'Group' configuration panel. At the top, there are tabs for 'Columns', 'Sort', 'Group', 'Aggregate', and 'Paging', with 'Group' selected. Below the tabs is a title 'Organize rows with grouping and sub-grouping.' followed by a 'Grouping Column' dropdown menu and an 'Add' button. Under the 'Groups:' section, there is a list item 'Sales Rep' with a 'Replace' button and a trash icon. Under the 'Detail Rows:' section, there is a checkbox for 'Exclude Detail Rows' which is currently unchecked.

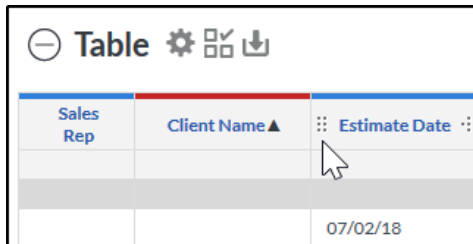
- **Aggregate** – this will calculate totals and/or averages. Set an **Aggregate Function** for a specific **Data Column**, replace or remove them ("**Aggregates**"), choose a position for the calculation results ("**Layout**"), and **Hide Function Names**:

The screenshot shows the 'Aggregate' configuration panel. At the top, there are tabs for 'Columns', 'Sort', 'Group', 'Aggregate', and 'Paging', with 'Aggregate' selected. Below the tabs is a title 'Calculate totals, averages and such for the top and grouped levels.' followed by a 'Data Column' dropdown menu and an 'Aggregate Function' dropdown menu set to 'Sum', with an 'Add' button below. Under the 'Aggregates:' section, there is a list item 'Sum(Commission Amount)' with a 'Replace' button and a trash icon. Under the 'Layout:' section, there is a 'Results Positioning' dropdown menu set to 'Top' and a checkbox for 'Hide Function Names' which is currently unchecked.

- **Paging** – choose to show all rows or split by paging and how many rows to show per page:

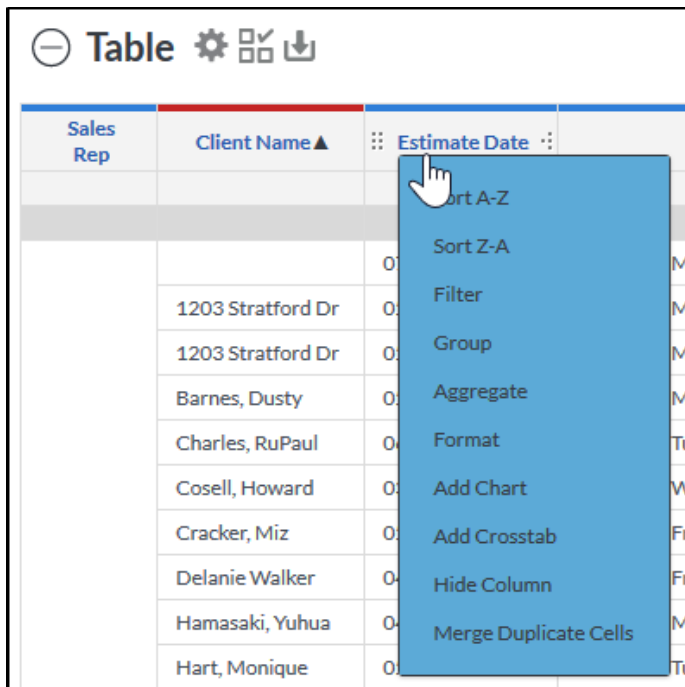
The screenshot shows the 'Paging' configuration panel. At the top, there are tabs for 'Columns', 'Sort', 'Group', 'Aggregate', and 'Paging', with 'Paging' selected. Below the tabs is a title 'Set the number of rows displayed per page.' followed by two radio buttons: 'Show all rows' (unchecked) and 'Show paging' (checked). Below the radio buttons is a 'Rows per Page' input field with the value '20' and an 'OK' button.

- **Adjust Columns** You can also modify the table on the table itself. Hover over the left side of any column header to see the dots:



| Sales Rep | Client Name ▲ | Estimate Date |
|-----------|---------------|---------------|
| | | 07/02/18 |

- Drag and drop to change the column order. The dots on the right side of the column will change the width of the column. Click the center of any column to see more options to adjust the column:



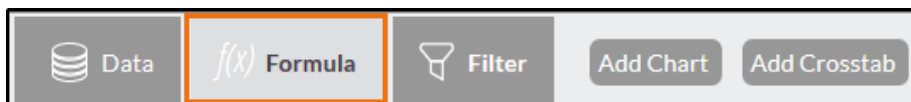
| Sales Rep | Client Name ▲ | Estimate Date |
|-----------|-------------------|---------------|
| | | |
| | 1203 Stratford Dr | 07/02/18 |
| | 1203 Stratford Dr | 07/02/18 |
| | Barnes, Dusty | 07/02/18 |
| | Charles, RuPaul | 07/02/18 |
| | Cosell, Howard | 07/02/18 |
| | Cracker, Miz | 07/02/18 |
| | Delanie Walker | 07/02/18 |
| | Hamasaki, Yuhua | 07/02/18 |
| | Hart, Monique | 07/02/18 |

Add a Formula to an Analysis Table

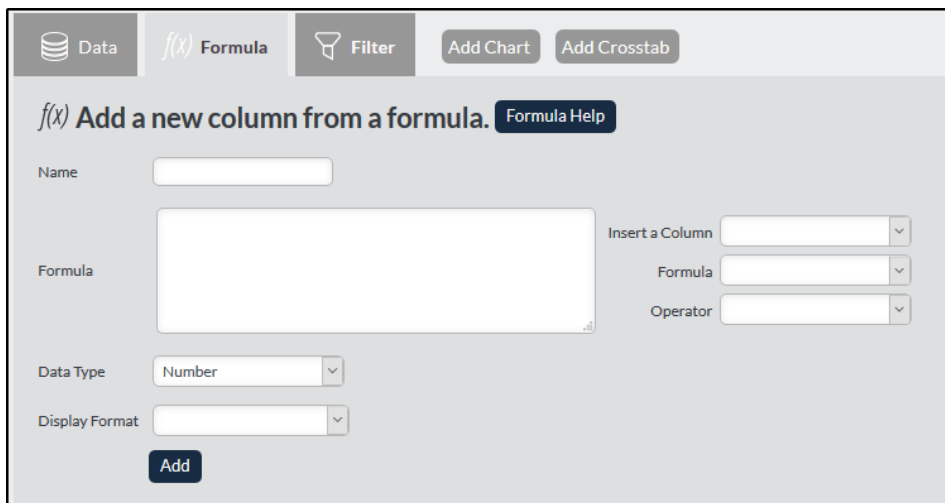
Formulas are a way of combining raw data to render some type of result. If you plan to use Formulas, be sure to start with this article first as Formulas do require a basic, functional understanding of SQL. Formulas can be quite complex, and you must know your destination before starting.

The steps below outline how to add a basic formula to a table using only an operator:

1. In an analysis, click the "Formula" tab.



2. Enter the Name for the formula. This will display as a new column in the table.

A dialog box titled 'f(x) Add a new column from a formula.' with a 'Formula Help' button. It contains several input fields: 'Name' (text box), 'Formula' (large text area), 'Data Type' (dropdown menu with 'Number' selected), and 'Display Format' (dropdown menu). On the right side, there are three dropdown menus: 'Insert a Column', 'Formula', and 'Operator'. An 'Add' button is located at the bottom left.

3. Use the **Insert a Column** dropdown list to add the first data point to the **Formula** field. Do not try to type this in manually, the code varies based on the data point.
4. Select an **Operator** from the dropdown list. This tells the system what to do with the two data points. An operator can be typed in manually once you've memorized the symbols for each one.
5. Something will need to go after the operator for it to function. It's possible to build a formula out of two numeric columns or you may want the operator to calculate against a static number, such as a percentage. Whatever this is, use a dropdown list or type this in manually after the operator symbol.
6. Select a **Data Type** from the dropdown list. This determines how the values of your formula will be generated.
7. Select a **Display Format** from the dropdown list. This determines how the values of your formula will be displayed.
8. Click **Add** to create the new column and refresh the table.

As formula columns are created, they're added to the "Formula" columns list. Use the adjacent **Replace** and **Remove** buttons to manage the list. Columns that have been added are now included in the list of available columns for use in other formulas.

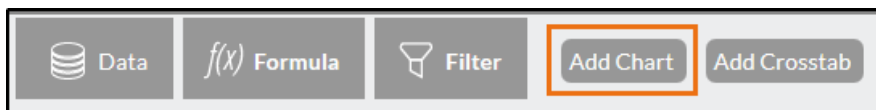
9. When you're finished, click the "Formula" tab to hide the panel.

For more information: Check out this [video](#) for more information about SQL formulas or click [here](#) for a quick how-to video on creating simple calculations.

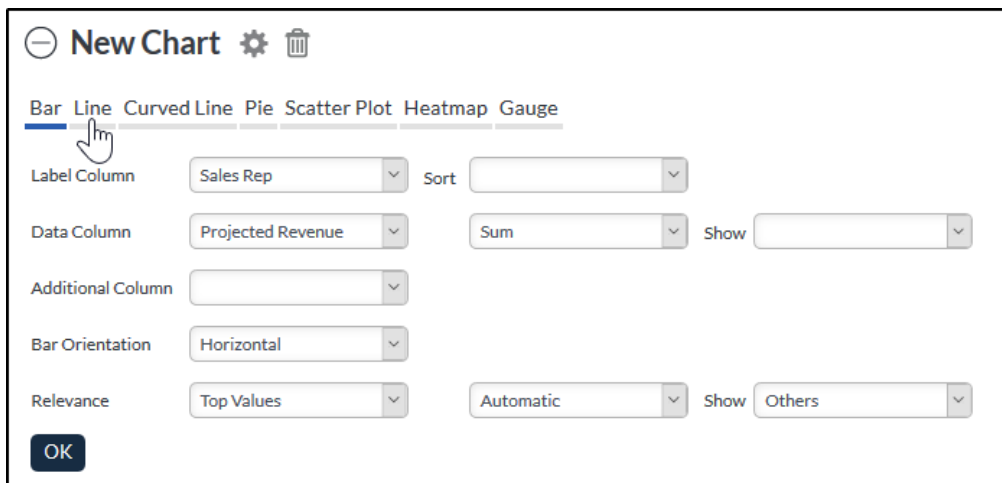
Add a Chart to an Analysis Table

Follow these steps to add a chart:

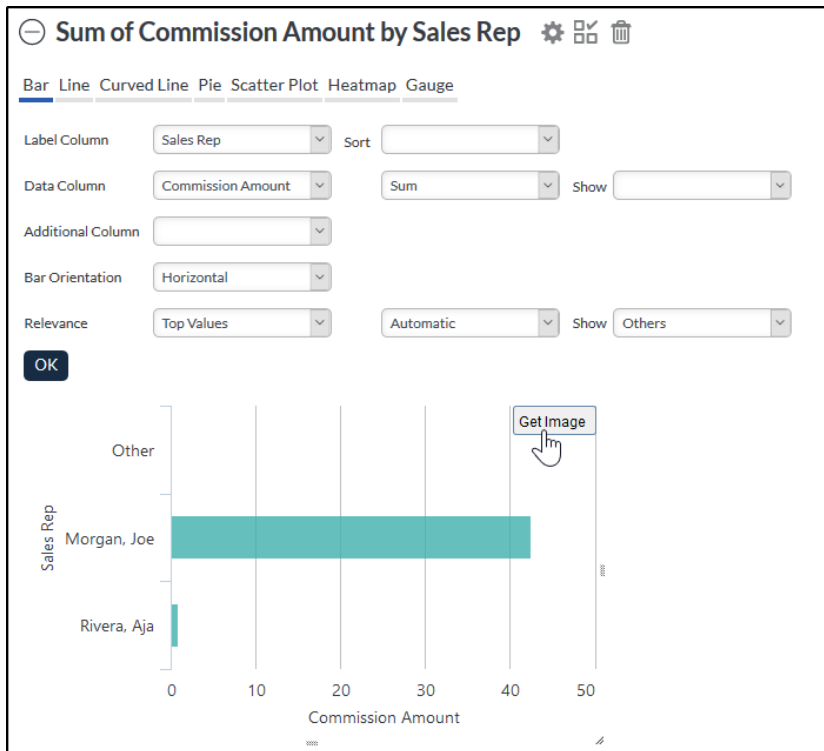
1. From an analysis, click **Add Chart**.



2. Click the option item for the type of chart to create.



3. Choose from the different chart modifiers. These will have a direct impact on the chart's x and y's axis, column labels, sizes, and additional columns. These vary based on the type of chart selected.
4. Click **OK** to generate the chart.
5. If you just need the image, hover over the top-right corner of the chart to see the **Get Image** button. Clicking this will open a dialog to save the chart to your computer.

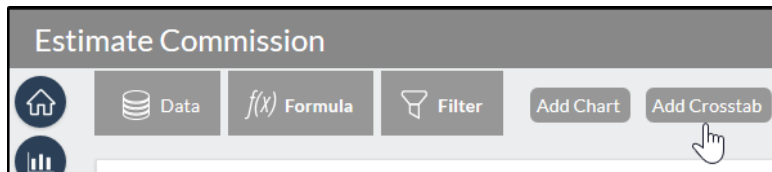


Add a Crosstab to an Analysis Table

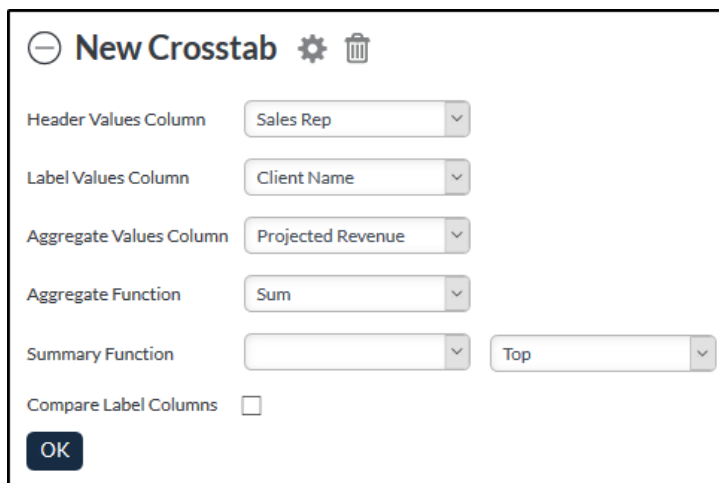
A crosstab, like a pivot table, compares two fields in a chart with the values in a third field.

Follow these steps to add a crosstab or click [here](#) for a how-to video:

1. Click the **Add Crosstab** button.



2. Select the **Header Value Column**, whose values will be shown horizontally as column headers, across the top of the crosstab table. Additional controls may appear depending on the data type of the selected columns.

A screenshot of a "New Crosstab" dialog box. It contains several dropdown menus and a checkbox. The "Header Values Column" is set to "Sales Rep", "Label Values Column" is "Client Name", "Aggregate Values Column" is "Projected Revenue", and "Aggregate Function" is "Sum". There is also a "Summary Function" dropdown set to "Top" and a "Compare Label Columns" checkbox which is unchecked. An "OK" button is at the bottom left.

3. Select the **Label Values Column**, whose values will be shown vertically, in the left-most column of each row.
4. Select the **Aggregate Values Column**, whose values will be aggregated to produce the contents for the rest of the table cells.
5. Select the **Aggregate Function** to apply to the column selected in step four. Options include:
 - Sum
 - Average
 - Standard Deviation
 - Count and Distinct
 - Count
 - Minimum
 - Maximum

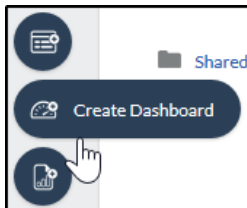
6. Select a **Summary Function** to display a summary result.
7. Check **the Compare Label Columns** check box to cause the difference between column values to be displayed, along with a cell shading indicator.
8. Click **OK**. This will generate the crosstab table in its own panel; otherwise, the table will be generated automatically as you make changes.

Create a Custom Dashboard

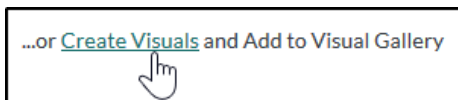
A dashboard is a collection of visuals (charts, gauges, and tables) that are placed into *dashboard panels*.

Follow these steps to create a new dashboard:

1. Go to the Report Center at **Reports > Report Center**.
2. Click **Create Dashboard**.



3. The **Visual Gallery** overlay will open over your new Untitled Dashboard. Click **Add** on any of options in the Visual Gallery. This will add your selection as a new panel in the dashboard. After you click **Add**, the button disappears and "Added" is displayed.
4. Click the **Create Visuals** link at the bottom of the overlay to add custom visuals to the dashboard.



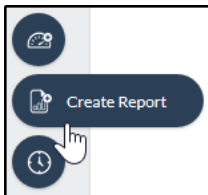
5. Click **Done** to close the Visual Gallery.
6. Click on **Untitled Dashboard** and type the name of the dashboard in the **Name** field. This name appears on the Report Center home page.
7. Click the gear icon on the "New" Tab at the top left and click **Rename Tab**, and then type a name for the dashboard tab. You can have multiple tabs within a dashboard, each containing multiple visuals.
8. If necessary, you can click and drag your visuals to rearrange them or you can rename and delete them from the gear icon located on the top right corner of the visual.
9. Click **"X"** on the top right to exit the dashboard.

Click [here](#) for more information on creating custom dashboards.

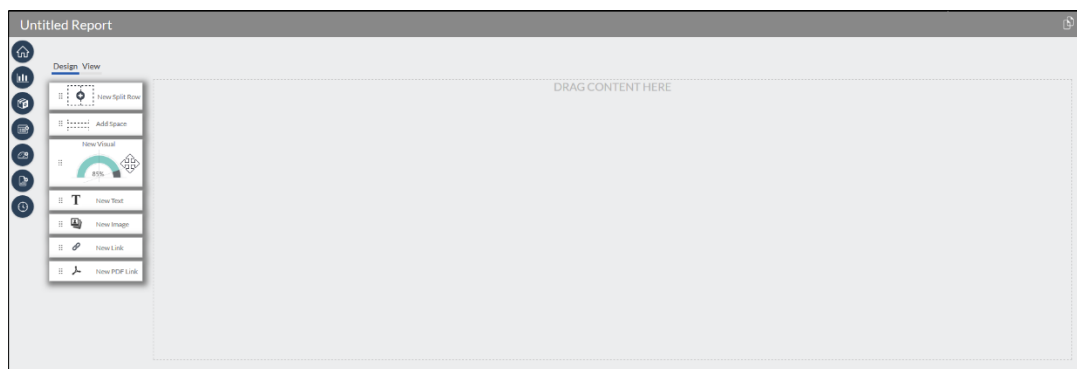
Create a New Report


Follow these steps to create a new report:

1. Go to the Report Center at **Reports > Report Center**.
2. Click **Create Report**.



3. You will be in the **Design** mode of a new, untitled report. Click **Untitled Report** to change the name. This is the name that will appear on the Report Center home page.
4. Drag and drop components (using the component toolbox on the left) onto the report canvas to add them.



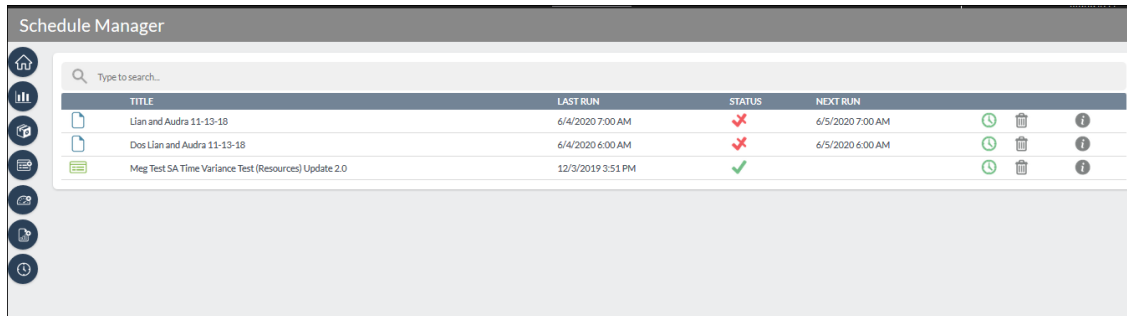
5. Rearrange components on the canvas by clicking their drag icon “” and dragging them to a new location.
6. Configure the component settings or delete them by clicking the gear or X icons.
7. Add or remove columns for the Split Row component by clicking the columns icon.

When you drag a visual component onto the canvas, the Visual Gallery displays, and you can select one or more visuals to insert into your report. Each selected visual will be inserted into its own separate panel. Having everything in panels allows you to customize the look and feel of your report.

Click [here](#) for a video on creating new reports.

Schedule a Report for Delivery (Pro Plus Feature)

Pro Plus Members can schedule up to five reports for automatic generation and delivery by email as a PDF attachment. Dashboards cannot be scheduled.



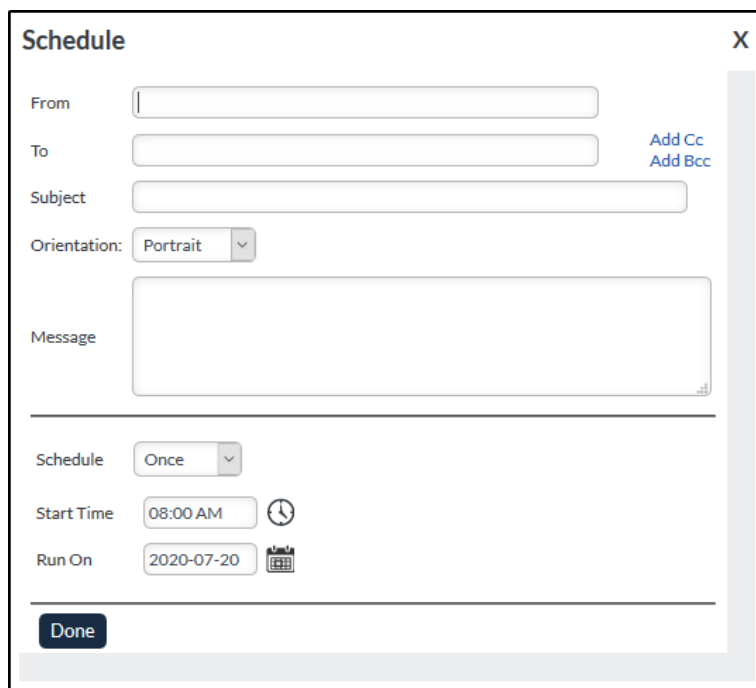
The screenshot shows the 'Schedule Manager' interface. It features a search bar at the top with the placeholder text 'Type to search...'. Below the search bar is a table with the following columns: TITLE, LAST RUN, STATUS, and NEXT RUN. The table contains three rows of data:

| TITLE | LAST RUN | STATUS | NEXT RUN |
|---|-------------------|--------|------------------|
| Lian and Audra 11-13-18 | 6/4/2020 7:00 AM | ✗ | 6/5/2020 7:00 AM |
| Dos Lian and Audra 11-13-18 | 6/4/2020 6:00 AM | ✗ | 6/5/2020 6:00 AM |
| Meg Test SA Time Variance Test (Resources) Update 2.0 | 12/3/2019 3:51 PM | ✓ | |

Each row in the table has three icons to its right: a clock icon, a trash icon, and an information icon. On the left side of the interface, there is a vertical sidebar with several circular icons representing different report categories.

Follow these steps to schedule a report delivery:

1. Go to **Reports > Report Center**.
2. Select a report and click its clock icon to set up or change its delivery schedule.
3. Fill in the **Schedule** panel.



The screenshot shows the 'Schedule' panel, which is a form for configuring report delivery. The form includes the following fields and controls:

- From:** A text input field.
- To:** A text input field with 'Add Cc' and 'Add Bcc' links to its right.
- Subject:** A text input field.
- Orientation:** A dropdown menu currently set to 'Portrait'.
- Message:** A large text area for entering a message.
- Schedule:** A dropdown menu currently set to 'Once'.
- Start Time:** A time input field set to '08:00 AM' with a clock icon to its right.
- Run On:** A date input field set to '2020-07-20' with a calendar icon to its right.
- Done:** A dark blue button at the bottom left of the panel.

| | |
|-------------------------------|--|
| From | Enter your email address (or the email address you want to appear as “Sent From”). |
| To | Enter the email address of the report recipient. Separate multiple addresses with a semicolon. |
| Subject | Enter a brief subject description. |
| Message | Enter the text of the email message, included when you choose the PDF or Excel format option. |
| Schedule | Select the interval and frequency for generating and delivering the report. You can choose from once, weekly, or monthly. - <i>If weekly</i> , type in how often and which days to send out the reports. - <i>If monthly</i> , enter a specific day number (1-31) for report delivery in the selected months. Then, select first, second, third, fourth, or last specific day of the week for the report delivery in the selected month. |
| Start Time | Click the clock icon and select a start time for the schedule delivery. |
| Start Date/ Run On | Click the calendar icon and select a start date for the delivery. |
| End Date | Check or uncheck the box to select an end date for the scheduled delivery. This applies only to weekly and monthly schedule intervals. |


4. Click **Done**.

5. Select the Schedule Manager to verify your scheduled reports.

You can click the “X” icon to close the panel at any time, without saving any changes.

Cancel a Scheduled Report Delivery

To cancel a report that you have scheduled for delivery, follow these steps. If a report or analysis is deleted before you cancel the delivery, you'll see an error message if you try to then delete it.

1. Go to the Schedule Manager and choose a report. Any scheduled report or analysis will have a green clock icon highlighted.
2. Click the clock icon to set up or change the delivery schedule. 
3. In the menu, click **Remove**. The report is removed from the schedule.

Share Report Center Content



You can share reports, dashboards, and analysis in the Report Center from the [Home tab](#) and will appear in the “Shared with Me” folder. To share a Report Center component, click the avatar icon next to the trash can icon and select the users to share with. [Company](#) shared reports will not appear in the “Shared with Me” folder.

Click [here](#) for a how-to video on sharing reports.

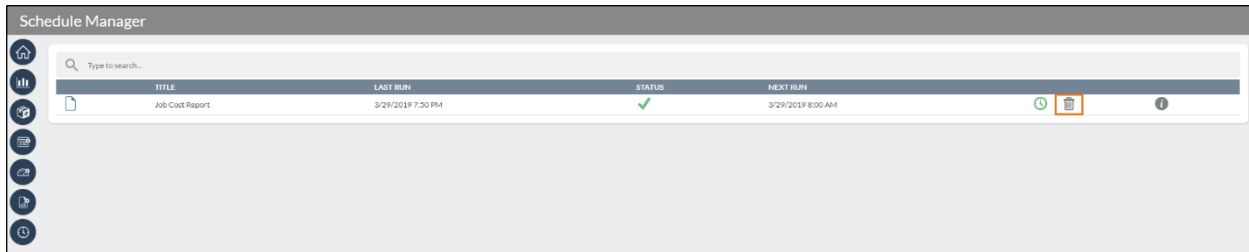
Delete Report Center Content



You can delete any content in the Report Center from the [Home tab](#). Each Report Center component has a trash can icon next to it. To delete a Report Center component, click the trash icon and confirm the deletion.

Delete a Scheduled Analysis

You can delete most Analyses from the “Home” tab, but if an Analysis is scheduled to be sent, you can remove it on the Schedule Manager by clicking the trash can icon.



| TITLE | LAST RUN | STATUS | NEXT RUN |
|-----------------|-------------------|--------|-------------------|
| Job Cost Report | 3/29/2019 7:30 PM | ✓ | 3/29/2019 8:00 AM |

Service Autopilot Reports

This section covers all SA pre-built reports, their purpose, and key areas of the system from where information is gathered.

Go to **Reports > Report Center >**  **AR Reports.**

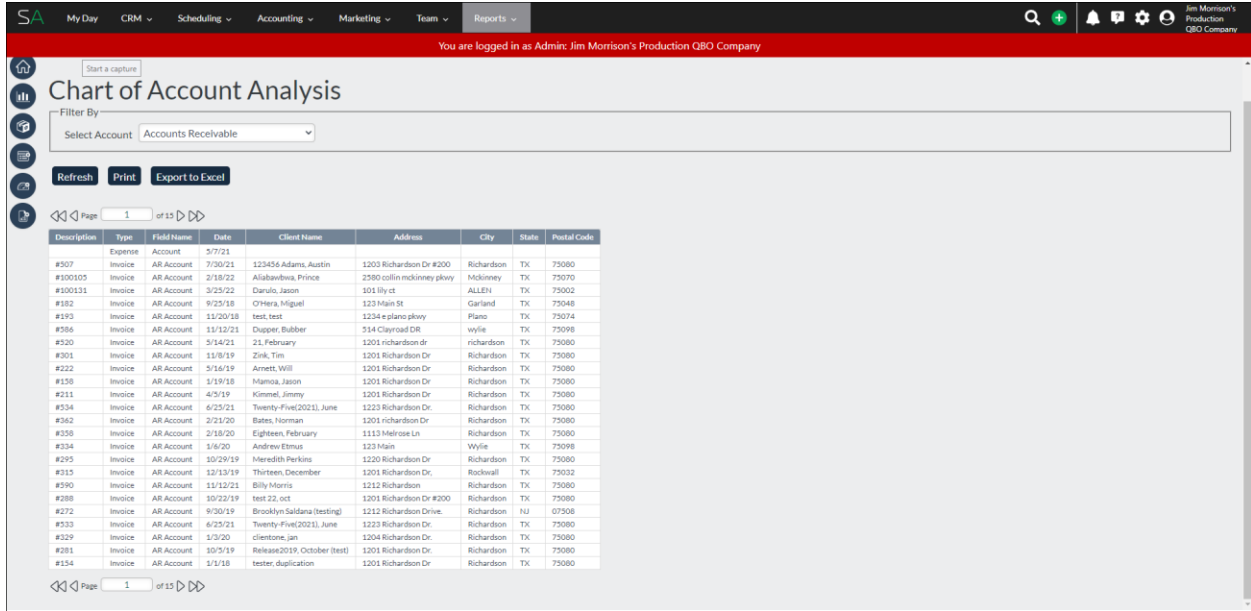
Audit Reports

Chart of Accounts Analysis (QBO Only)

The Chart of Accounts Report is for QuickBooks Online users to shows all transactions and items.

The data it shows depends on the kind of account. The report displays every item in the system that's tied to that account.

You can filter by the type of Account.



The screenshot displays the 'Chart of Account Analysis' report. At the top, there is a navigation bar with tabs for 'My Day', 'CRM', 'Scheduling', 'Accounting', 'Marketing', 'Team', and 'Reports'. Below the navigation bar, the user is logged in as 'Admin: Jim Morrison's Production QBO Company'. The report title is 'Chart of Account Analysis'. A filter dropdown is set to 'Accounts Receivable'. Below the filter, there are buttons for 'Refresh', 'Print', and 'Export to Excel'. The main content is a table with the following columns: Description, Type, Field Name, Date, Client Name, Address, City, State, and Postal Code. The table contains 20 rows of data, including transactions from clients like '123456 Adams, Austin', 'Alabawbia, Prince', 'Danulo, Jason', 'O'Hera, Iniguel', 'test, test', 'Dupper, Bubber', '21, February', 'Zink, Tim', 'Arnett, Will', 'Mama, Jason', 'Kimmel, Jimmy', 'Twenty-Five(2021), June', 'Bates, Norman', 'Eighteen, February', 'Andrew Elmus', 'Meredith Perkins', 'Thirteen, December', 'Billy Morris', 'test 22, oct', 'Brooklyn Saldana (testing)', 'Twenty-Five(2021), June', 'clientone_jan', 'Release2019, October (test)', and 'tester, duplication'.

| Description | Type | Field Name | Date | Client Name | Address | City | State | Postal Code |
|-------------|---------|------------|----------|-----------------------------|---------------------------|------------|-------|-------------|
| Expense | Account | | 5/7/21 | | | | | |
| #507 | Invoice | AR Account | 7/30/21 | 123456 Adams, Austin | 1203 Richardson Dr #200 | Richardson | TX | 75080 |
| #100105 | Invoice | AR Account | 2/18/22 | Alabawbia, Prince | 2580 collin mckinney pkwy | McKinney | TX | 75070 |
| #100131 | Invoice | AR Account | 3/25/22 | Danulo, Jason | 101 lily ct | ALLEN | TX | 75002 |
| #182 | Invoice | AR Account | 9/23/18 | O'Hera, Iniguel | 123 Main St | Garland | TX | 75048 |
| #193 | Invoice | AR Account | 11/20/18 | test, test | 1234 e glenn pkwy | Piano | TX | 75074 |
| #556 | Invoice | AR Account | 11/12/21 | Dupper, Bubber | 314 Clayroad DR | wylie | TX | 75098 |
| #520 | Invoice | AR Account | 5/14/21 | 21, February | 1201 richardson dr | richardson | TX | 75080 |
| #301 | Invoice | AR Account | 11/8/19 | Zink, Tim | 1201 Richardson Dr | Richardson | TX | 75080 |
| #222 | Invoice | AR Account | 5/16/19 | Arnett, Will | 1201 Richardson Dr | Richardson | TX | 75080 |
| #158 | Invoice | AR Account | 1/19/18 | Mama, Jason | 1201 Richardson Dr | Richardson | TX | 75080 |
| #211 | Invoice | AR Account | 4/5/19 | Kimmel, Jimmy | 1201 Richardson Dr | Richardson | TX | 75080 |
| #534 | Invoice | AR Account | 6/25/21 | Twenty-Five(2021), June | 1223 Richardson Dr. | Richardson | TX | 75080 |
| #362 | Invoice | AR Account | 2/21/20 | Bates, Norman | 1201 richardson Dr | Richardson | TX | 75080 |
| #350 | Invoice | AR Account | 2/18/20 | Eighteen, February | 1113 Melrose Ln | Richardson | TX | 75080 |
| #334 | Invoice | AR Account | 1/6/20 | Andrew Elmus | 123 Main | Wylie | TX | 75098 |
| #295 | Invoice | AR Account | 10/29/19 | Meredith Perkins | 1223 Richardson Dr | Richardson | TX | 75080 |
| #315 | Invoice | AR Account | 12/13/19 | Thirteen, December | 1201 Richardson Dr. | Rockwall | TX | 75082 |
| #590 | Invoice | AR Account | 11/12/21 | Billy Morris | 1212 Richardson | Richardson | TX | 75080 |
| #288 | Invoice | AR Account | 10/22/19 | test 22, oct | 1201 Richardson Dr #200 | Richardson | TX | 75080 |
| #272 | Invoice | AR Account | 9/30/19 | Brooklyn Saldana (testing) | 1112 Richardson Drive. | Richardson | NJ | 07508 |
| #333 | Invoice | AR Account | 6/25/21 | Twenty-Five(2021), June | 1223 Richardson Dr. | Richardson | TX | 75080 |
| #329 | Invoice | AR Account | 1/3/20 | clientone_jan | 1204 Richardson Dr. | Richardson | TX | 75080 |
| #281 | Invoice | AR Account | 10/5/19 | Release2019, October (test) | 1201 Richardson Dr. | Richardson | TX | 75080 |
| #154 | Invoice | AR Account | 1/1/18 | tester, duplication | 1201 Richardson Dr | Richardson | TX | 75080 |

Income Not Invoiced Report

All completed, dispatched, and skipped services or visits for which the client has a balance due. It can be filtered by date range and Job Status. This report doesn't include current scheduled services.

The screenshot shows the 'SA Report' interface for 'Income not Invoiced'. The filter section is set to 'Start Date: 1/1/2020' and 'End Date: 8/4/2020'. The table below lists 14 service records with their respective amounts, totaling 477.00.

| Date | Client | Address | City | State | Postal Code | Service | Status | Amount |
|-----------|--------------------|-----------------------|------------|-------|-------------|-------------------------|------------|--------|
| 2/17/2020 | Ben Roethlisberger | 347 Gore Rd | Frisco | TX | 4055 | System Check | Dispatched | 0.00 |
| 2/29/2020 | A.J. Green | 22 E Senhouse Drive | Frisco | TX | 4055 | Lawn Mowing | Dispatched | 55.00 |
| 2/29/2020 | Commodore Park | 1361 W Bell Lane Rd | Richardson | TX | 75080 | Flower Bed Weed Control | Dispatched | 55.00 |
| 2/29/2020 | Julio Jones | 1315 Bolara Dr | Richardson | TX | 75080 | Flower Bed Weed Control | Dispatched | 55.00 |
| 2/29/2020 | Philip Rivers | Meadow Rd | Carland | TX | 4015 | Flower Bed Weed Control | Dispatched | 55.00 |
| 4/21/2020 | Evan Egram | 19 Carlen Lane | Frisco | TX | 4055 | Lawn Mowing | Dispatched | 26.00 |
| 4/27/2020 | Walter Reed School | 48 County Rd 127 | Willsboro | TX | 74275 | Lawn Mowing | Dispatched | 44.00 |
| 4/27/2020 | Wagner, Bobby | 15627 Forest Creek Pl | Dallas | TX | 75230 | Lawn Mowing | Dispatched | 44.00 |
| 4/27/2020 | Walter Mame | 66 Marshall Rd | Frisco | TX | 4055 | Lawn Mowing | Dispatched | 44.00 |
| 5/7/2020 | Jill LaCar | 19 Patisia Lane | S. Garland | TX | 4077 | Bed Maintenance | Dispatched | 75.00 |
| 5/12/2020 | David Hight | 21 Maplefield Rd | Frisco | TX | 4055 | Lawn Mowing | Dispatched | 24.00 |
| 5/19/2020 | Beth Iovone | 3000 Copper Ridge Dr | Plano | TX | 75092 | Mossquito Control | Dispatched | 0.00 |
| Totals | | | | | | | | 477.00 |

Description

- Date** Date based on initial scheduled date
- Client** Client name based on the visit details and its settings
- Address fields** Address, City, State, and postal code that corresponds to the Job details and settings
- Service** Visit or service performed
- Status** Status of service or visit
- Amount** Pre-taxed amount for the service or visit; this does not include product rates

Lead Timeline Report

All lead timeline entries within a date range you select. You can also filter by client, type, and resource to narrow the results.

Lead Timeline Report

Filter By

Start Date: 11/11/2020 End Date: 11/11/2020 Lead: Type: Select options

Refresh Print Export to Excel

Page 1 of 1

| Date | Type | Name | Title | Amount |
|------|------|------|-------|--------|
|------|------|------|-------|--------|

Page 1 of 1

Description

| | |
|--------------------|---|
| Date | Date of the event |
| Type | Type of event, such as “Email.” |
| Client Name | The name on the Account where the event took place. |
| Title | The title of the event. For emails, this will be the subject line of the email. |
| User | The user who created or modified the event. |

Sales Commission Export Report

This report shows Services sold by Sales Rep. Data on this report appears only after a payment is applied to the invoice. You can filter this report by date range, Sales Rep, or Service.

| Invoice Date | Date Paid | Invoice # | Client | Service | Class | Amount | Sales Rep | Is Contract |
|--------------|-----------|-----------|---------------|-------------------------|-------|--------|-----------|-------------|
| 8/1/2020 | 8/1/2020 | 441 | Jacobs, Jacob | Snow Contract Agreement | | \$0.00 | | Yes |
| Total | | | | | | \$0.00 | | |

Description

- Invoice Date** the date on the Invoice
- Date Paid** the date the Payment was applied to the Invoice
- Invoice #** the Invoice number
- Client** the name on the client Account
- Service** the Service on the Invoice
- Class** the class on the Service on the Invoice
- Amount** the line item amount on the Invoice
- Sales Rep** the Sales Rep on the Master Job record
- Is Contract** whether the Visit is billed to an Installment Plan

What's Not Included: Tax.

Note: Discounts will be included only if they were added to a Service from the Master Job, not to the Invoice itself.

Unapplied Payments Report

A list of payments that have an unused amount and the client who made the overpayment.

| Client | Address | City | State | Postal Code | Payment Date | Ref. Number | Amount | Unused Amount |
|---------------|----------------|-------|-------|-------------|--------------|-------------|--------------|---------------|
| Schott, Marge | 1405 Cibolo Dr | Allen | TX | 75013 | 2/10/2020 | 1642 | 25.00 | 10.00 |
| Total | | | | | | | 25.00 | 10.00 |

Description

Client Client name

Address fields Client address, city, state, and postal code for the client account

Payment Date Date of payment

Ref. Number Any reference number on the payment, such as a check number or other number entered on payment types

Amount Amount of payment

Unused Amount Amount of unused (over) payment

Client Reports

Cancellation Count Report

Shows how many cancellations occurred in a selected time frame.

SA Report

Cancellation Count Report

Filter By

Start Date: 9/1/2018 End Date: 9/24/2020

Refresh Print Export to Excel

| | |
|------------------------|--------|
| Total Canceled Clients | 2 |
| Avg Days as a Client | 962.00 |

| By Cancellation Reason | Count | Percent |
|------------------------|-------|---------|
| Dropping Customer | 1 | 50.00% |
| Other | 1 | 50.00% |

| By Source | Count | Percent |
|-----------|-------|---------|
| | 0 | 0.00% |

| By Sales Rep | Count | Percent |
|--------------|-------|---------|
| | 0 | 0.00% |

| By CSR | Count | Percent |
|--------|-------|---------|
| | 0 | 0.00% |

| By Postal Code | Count | Percent |
|----------------|-------|---------|
| 4055 | 1 | 50.00% |
| 92104 | 1 | 50.00% |

Description

Total Canceled Clients Total number of cancellations and average of account longevity

By Cancellation Reason Cancellations by reason

By Source Cancellations by source found

By Sales Rep Cancellations by Sales Rep

By CSR Cancellations by Customer Support Rep

By Postal Code Cancellations by postal (zip) code

Client Balance Report

A list of clients who have an account balance. You can filter by the amount on the account balance.

The screenshot shows the 'SA Report' interface with the 'Client Balance' report selected. A filter is applied: 'Where Account Balance Greater Than' with a value of '0.00'. The report table contains the following data:

| Client | Address | City | State | Postal Code | Account Balance |
|---------------------|------------------------------------|------------|-------|-------------|-----------------|
| 1203 Stratford Dr | 1203 Stratford Dr | Richardson | TX | 75080 | \$108.23 |
| 1224 Golden Lane | 1224 Golden Lane | Irving | TX | 75062 | \$243.23 |
| 23241 HICKORY DR | 23241 HICKORY DR | Plano | TX | 75074 | \$66.60 |
| A. J. Green | 277 Foxhollow - Delite | Plano | TX | 40155 | \$163.98 |
| Aaron Rodgers | 3409 Tangletown Trail | Plano | TX | 75023 | \$44.95 |
| Adam Thelmer | 3322 Cross-Broad Rd | Plano | TX | 75023 | \$44.95 |
| Adamson, Adam | 8322 Glen Regar Dr | Dallas | TX | 75243 | \$640.02 |
| Alan Collins | 2924 Mission Ridge Rd | Plano | TX | 75022 | \$137.24 |
| Allcraft | 141 495th Lane | S. Garland | TX | 40127 | \$706.24 |
| Allen Area | 1413 Clarks Dr | Allen | TX | 75013 | \$113.42 |
| Allen Cooper | 42 Cavellton Road | Richardson | TX | 40151 | \$189.70 |
| Andrew Leck | 26 Pinesdale Lane | Bonham | TX | 4080 | \$365.34 |
| Barnes, Dusty | 1251 E Bobb Lane Rd | Richardson | TX | 75081 | \$2,768.42 |
| Barter DSJ | New Address | Allen | TX | 75013 | \$123.42 |
| Ben-Horvitzberger | 1417 Grove Rd | Plano | TX | 40155 | \$113.31 |
| Beth James | 3000 Copper Ridge Dr | Plano | TX | 75093 | \$113.19 |
| Big Chasen | 1402 San Salvo Ct | Allen | TX | 75013 | \$113.42 |
| Bill Custer | 1408 San Salvo Ct, Allen TX, 75013 | Allen | TX | 75013 | \$113.42 |
| Bobby Smacko | 1224 Cancho Dr | Allen | TX | 75013 | \$123.42 |
| Cam Houston | 172 Richardson Oaks Rd | Richardson | TX | 40151 | \$75.14 |
| Carlene Adams | 114 Marlboro Dr | Richardson | TX | 75081 | \$66.20 |
| Charles Clay | 4 South Lane | Plano | TX | 40155 | \$199.64 |
| Christina M. Coffey | 1807 South Hill Drive | Plano | TX | 75023 | \$122.44 |
| Chuck Davis | 150 Lakewood Rd | Carroll | TX | 4015 | \$44.88 |
| Coast, Howard | 200 Rochelle Dr | Irving | TX | 75062 | \$1,673.11 |
| Total | | | | | \$2,139.02 |

Description

Client Client name

Address fields Client address, city, state, and postal (zip) code

Account Balance The total account balance for clients with an open balance

Client Contact List Report

A list of all contacts with their billing addresses and phone numbers. You can filter by account balance and Sales Rep.

| Client | Bill To | Sales Rep | Home Phone | Work Phone | Cell Phone | Other Phone | Acct Balance |
|--------------------|--|--------------|--------------|--------------|--------------|--------------|--------------|
| 1200 Waterloo Dr | 1200 Waterloo Dr 1200 Waterloo Dr 75069 | | | | 936-559-9113 | | \$108.25 |
| 1234 Garden Lane | Allen Dorby 207 Jefferson Ln Dallas, TX 75245 | | | | | | \$541.25 |
| 2321 Felicia Dr | Alisa Jones 2324 Felicia Dr Plano, TX 75074 | | | | | | \$61.00 |
| A. J. Green | A. J. Green 22 Riverbend Dr New Paris, ME 04555 | | | | 207-595-1138 | | \$249.98 |
| Aaron Rodgers | Aaron Rodgers 121 William Street Dartmouth, MA 02740 | | 508-999-9160 | | | | \$64.95 |
| Allen Thacker | Allen Thacker 2275 Cross Road Hill Plains, TX 75033 | | 202-641-2257 | | | | \$64.95 |
| Adamson, Adam | Adam Adamson 6225 Glen Ridge Dr Dallas, TX 75243 | | 555-555-5555 | | 201-229-5448 | | \$640.02 |
| Alex Collins | Alex Collins 3924 Malcom ridge Hill Plains, TX 75033 | | 647-336-0 | 508-624-9113 | 115-111-1111 | | \$521.38 |
| Ali Carter | Ali Carter 4045 Rte 101 Concord, ME 04077 | | | | | | \$284.29 |
| Allen Area | Allen Area 1413 Crooks Dr Allen, TX 75002 | | | | | | \$123.42 |
| Anna Cooper | Anna Cooper 10000 South 10th St Burien, NE 68015 | | | 415-147-7 | | | \$1047.30 |
| Andrew Cook | Andrew Cook 52 Pinewood Lane Burwell, NE 68009 | 703-666-4 | | | | | \$298.30 |
| Barren, Denny | Barren, Denny 1515 E Bell Line Rd Richardson, TX 75081 | 555-555-5555 | | | | | \$748.42 |
| Barter Bill | Barter Bill 1409 Crooks Dr Allen, TX 75002 | | | | 451-200-8213 | | \$123.42 |
| Ben Bartelmeberger | Ben Bartelmeberger 1091 Eagle Rd Framingham, MA 01901 | | | 617-231-0093 | 308-000-8611 | | \$121.31 |
| Bob Jones | Bob Jones 3000 Cooper Ridge Dr Plano, TX 75075 | 703-760-8183 | | 647-372-4 | | | \$115.19 |
| DG Chase | DG Chase 112 Maple Lane Allen, TX 75002 | | | 115-111-1111 | | | \$123.42 |
| Bill Custom | Bill Custom 1408 San Saba Ct Irving, TX 75062 | | | | | | \$123.42 |
| Dobby Smadto | Dobby Smadto 1224 Concho Dr Allen, TX 75013 | | | | | | \$123.42 |
| Cam Newton | Cam Newton 610 New Rd 01511 Southbury, ME 04915 | | 988-583-3 | | | | \$17.96 |
| Carlene Adams | Carlene Adams 31 Rockwood Dr Cape Elizabeth, ME 04107 | | 767-274-4 | 202-201-2 | | | \$68.20 |
| Charles Day | Charles Day 21 Morefield Rd Southbury, MA 01576 | | | | 978-479-4383 | 617-625-9173 | \$19.66 |
| Charles McCarthey | Charles McCarthey 3802 Road Hill Plains, TX 75033 | | 207-600-2229 | | | | \$123.44 |
| Chuck Davis | Chuck Davis 1501 Johnson Rd Sanford, ME 04115 | | | | 978-276-7642 | | \$588.36 |
| Clare Howard | Howard Clout 1842 E. Northgate Dr Irving, TX 75062 | 555-555-5555 | | | | | \$1,881.54 |

Description

Note that the account balance on Master Properties will include the balance on all Sub-Properties as well as the Master Property.

Client Client name

Bill To Billing information for the client

Acct Balance The total account balance calculated by one or more transactions with an open balance

Client Contracts Report

A summary of all client contracts and their monthly invoiced amount. You can filter by contact start and end dates.

| Client Name | Description | Day | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|-------------------------------------|--|-----|-----------------|-----------------|-----------------|---------------|---------------|---------------|---------------|---------------|---------------|-------------------|-----------------|-----------------|
| 101 Viles Dr 101 Viles Dr | 4/28/2020 to 4/28/2021 Installation Plan | 1 | \$75.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Adam Thielen 3321 Cross Bend Rd | 1/1/2020 to 12/31/2020 | 1 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Adam Thielen 3321 Cross Bend Rd | 4/29/2020 to 4/29/2021 | 1 | \$75.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Bob Mosler 1820 E. Northgate Dr. | 6/29/2020 to 6/29/2021 Snow Contract Agreement | 1 | \$100.00 | \$100.00 | \$100.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$100.00 | \$100.00 |
| Bob Smith 2361 Corniche Dr | 10/31/2019 to 3/31/2020 (month) Snow Removal Services | 31 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$1,800.00 | \$0.00 | \$0.00 |
| Cosell, Howard 200 Rochelle Dr. | 9/15/2020 to 9/15/2021 | 1 | \$100.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Totals | | | \$350.00 | \$100.00 | \$100.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$1,800.00 | \$100.00 | \$100.00 |

Description

Description Contract start and end date including all line items on contract

Day Date invoices are created

(Month) Amount on monthly invoice

Totals Totals for all monthly invoices

Client Method of Payment Report

This report is a list of the default Payment Methods assigned to client Accounts. You can filter by client type (active or former) or payment method:

The screenshot shows the 'SA Report' interface for the 'Client Method of Payment' report. The filter section is set to 'All Clients' and 'Method Of Payment'. The table below lists client information and their assigned payment methods.

| Client Name | Address | City | State | Postal Code | Method Of Payment | Payment Type |
|----------------------|----------------------------------|------------|-------|-------------|-------------------|------------------|
| 101 Viles Dr | 101 Viles Dr | Saint Paul | MN | 55105 | Check | Check |
| 1203 Stratford Dr | 1203 Stratford Dr | Richardson | TX | 75080 | Check | Check |
| 1229 Main St | Main St | The Colony | TX | 75056 | Check | Check |
| 1234 Golden Lane | 1234 Golden Lane | Irving | TX | 75062 | Check | Check |
| 2324 Felicia Dr | 2324 Felicia Dr | Plano | TX | 75074 | Check | Check |
| 288 Mayberry Hill Rd | 288 Mayberry Hill Rd | Garland | TX | 4015 | Check | Check |
| A.J. Green | 22 Eisenhower Drive | Frisco | TX | 4055 | Credit Card | Visa |
| Aaron Rodgers | 3409 Singletree Trail | Plano | TX | 75023 | Check | Check |
| Adam Thielens | 3323 Cross Bend Rd | Plano | TX | 75023 | Credit Card | MasterCard |
| Adamsen, Adam | 8323 Glen Regal Dr | Dallas | TX | 75243 | Credit Card | Visa |
| Alan Collins | 3924 Mission Ridge Rd | Plano | TX | 75023 | Credit Card | Visa |
| Ali LeDae | 19 Letitia Lane | S. Garland | TX | 4077 | Check | Check |
| Allen Area | 1413 Cibolo Dr | Allen | TX | 75013 | Check | Check |
| Alvin Kamara | 37 Main St | Richardson | TX | 4071 | Check | Check |
| Amari Cooper | 42 Capatlon Road | Richardson | TX | 4071 | Credit Card | Visa |
| Andrew Luck | 26 Pinewood Lane | Rowlett | TX | 4040 | Check | Check |
| Antonio Brown | 63 Pine Rock Rd | Frisco | TX | 4055 | Check | Check |
| Barnes, Dusty | 1251 E Belt Line Rd | Richardson | TX | 75081 | Credit Card | American Express |
| Barter Bill | New Address | Allen | TX | 75013 | Check | Check |
| Ben Hoeftberger | 347 Gore Rd | Frisco | TX | 4055 | Other | Credit Card |
| Bert Stevenson | 9-10 Smith Lane/Thompson Pl | Frisco | TX | 4055 | Check | Check |
| Beth Iones | 3000 Copper Ridge Dr | Plano | TX | 75093 | Check | Check |
| Big Cheese | 1402 San Saba Ct | Allen | TX | 75013 | Check | Check |
| Bill Custom | 1408 San Saba Ct Allen TX, 75013 | Allen | TX | 75013 | Check | Check |
| Bob Mosher | 1820 E. Northgate Dr. | Irving | TX | 75062 | Check | Check |

Description

- Method of Payment** The payment method stored in the client account
- Payment Type** For credit card payments, the specific type of credit card

Client Phone List Report

A list of clients and their contact information based on a “client since” date. You also can filter by Sales Rep.

| Client | Address | City | State | Postal Code | Home Phone | Work Phone | Cell Phone | Other Phone | Sales Rep |
|----------------------|-----------------------------------|------------------|-------|-------------|--------------|--------------|--------------|-------------|-----------|
| 101 Vibes Dr | 101 Vibes Dr | Saint Paul | MN | 55105 | | | | | |
| 1203 Stratford Dr | 1203 Stratford Dr | Richardson | TX | 75080 | | | 555-555-5555 | | |
| 1229 Main St | Main St | The Colony | TX | 75056 | | | | | |
| 1234 Golden Lane | 1234 Golden Lane | Irving | TX | 75062 | | | | | |
| 2224 Felicia Dr | 2224 Felicia Dr | Plano | TX | 75074 | | | | | |
| 288 Mayberry Hill Rd | 288 Mayberry Hill Rd | Garland | TX | 4015 | | | | | |
| A.J. Green | 22 Eisenhower Drive | Frisco | TX | 4035 | | | 207-995-1138 | | |
| Adam Thielen | 3321 Cross Bend Rd | Plano | TX | 75023 | 207-647-2352 | | 207-329-3448 | | |
| Adamson, Adam | 8325 Glen Regal Dr | Dallas | TX | 75243 | 555-555-5555 | | | | |
| Alan Arva | 1413 Clovis Dr | Allen | TX | 75013 | | | | | |
| Barnes, Daulty | 1231 E. Bell Line Rd | Richardson | TX | 75081 | 555-555-5555 | | | | |
| Barter Bill | New Address | Allen | TX | 75013 | | | 651-900-8215 | | |
| Ben Roethlisberger | 347 Gore Rd | Frisco | TX | 4035 | | 617-231-6015 | 508-808-4651 | | |
| Big Cheese | 1402 San Saba Ct | Allen | TX | 75013 | | | 111-111-1111 | | |
| Bill Cantom | 1408 San Saba Ct, Allen TX, 75013 | Allen | TX | 75013 | | | | | |
| Bob Mosler | 1820 E. Northgate Dr. | Irving | TX | 75062 | | | 111-111-1111 | | |
| Bob Smith | 2301 Concho Dr | Plano | TX | 75074 | | | | | |
| Bobber, Bob | 123 Fox Ln | Marvin | PA | 55555 | | | 333-333-3333 | | |
| Bobby Smacko | 1224 Concho Dr | Allen | TX | 75013 | | | | | |
| Bridgewater, Teddy | 1206 Bell Line Ave | Irving | TX | 75060 | | | | | |
| Chavis Apartments | 443 Arnold Dr | Irving | TX | 75062 | | | 444-444-4444 | | |
| Chavis, Conny | | | | | | | 444-444-4444 | | |
| Chuck Davis | 130 Lakewood Rd | Garland | TX | 4015 | | | 978-376-7642 | | |
| Collins, Alex | 407 Highland Ave | Highland Village | TX | 75077 | | | | | |
| Cowell, Howard | 200 Rochelle Dr. | Irving | TX | 75062 | 555-555-5555 | | | | |

The columns display the client name and other basic client contact information including all phone numbers.

Client Referral Report

This report shows who referred a client according to the “Referred By” field on the client account within a given time period. (Account > Sales > Referred By).

| Client | Referred By | Referrer Address | City | State | Postal Code | Client Since |
|-------------|---------------|--------------------|---------|-------|-------------|--------------|
| A.J. Green | Lamar Miller | 10 Escott Way | Frisco | TX | 4055 | 12/19/2016 |
| Darryl Cook | Cameron Brate | 110 Alpine Village | Rowlett | TX | 4040 | 5/27/2011 |
| Count | | | | | | 2 |

Description

Remember that these are word-of-mouth referrals, not by Source. The columns in the table display the client, who they were referred by, and the basic account information and Client Since date for the referrer.

Client Source Campaigns Report

This report shows Source Campaigns along with their costs, Returns on Investments (ROI), and response rates in a defined time frame. You can filter by date, source, and recovery days (the amount of time it takes to convert the Account from a lead to a client):

A Source Campaign is enabled under **Settings > CRM > Client Sources**.

SA Report

Client Source Campaigns

Filter By

Start Date: 9/1/2018 End Date: 9/15/2020 Source: Recovery Days: 30

Refresh Print Export to Excel

Page 1 of 1

| Source | Start | End | Distribution Qty | Total Expense | Responses | Cost Per Lead | Sales | Conversion Rate | Cost Per Sale | ROI % | ROI \$ | Response Rate | Avg Recovery \$ | Cancellations | Avg Retention Days |
|--------|-------|-----|------------------|---------------|-----------|---------------|-------|-----------------|---------------|-------|--------|---------------|-----------------|---------------|--------------------|
| Totals | | | 0 | \$0.00 | 0 | \$0.00 | 0 | 0.00% | \$0.00 | 0.00% | \$0.00 | 0.00% | \$0.00 | 0 | 0.00 |

Page 1 of 1

Indicates that a Client Source Campaign is an Upsell

(Responses) For non-Upsell Client Source Campaigns, a response is a Lead, converted Lead, or Client whose Source matches the Client Source Campaign's Source and whose Lead Acquired Date (or Client Since Date if there was no Lead Acquired Date) falls into the Client Source Campaign's date range. For Upsell Client Source Campaigns, a response is a Lead, converted Lead, or Client who had any number of Estimates or Jobs with the same Source as the Client Source Campaign's Source and whose Estimate Date or Date Sold, respectively, falls into the Client Source Campaign's date range.

(Cost Per Lead) Calculated based on the Client Source Campaign's Total Expenses per Response

(Sales) A sale is a converted Lead or Client

(Cost Per Sale) Calculated based on the Client Source Campaign's Total Expenses per converted Lead or Client

(ROI %) Calculated as a percentage of profit earned, $(ROI \$ - Total Expense) / Total Expense$

(ROI \$) For non-Upsell Client Source Campaigns, this is the sum of all Invoices (pre-tax). For Upsell Client Source Campaigns, this is the sum of all Invoiced Jobs sold under the campaign

(Response Rate) Calculated as a percentage of Responses / Distribution Quantity

(Response Rate) Calculated based on the number of responses proportional to the distribution quantity

(Avg Recovery \$) Calculated based on ROI \$ per Sale in between the campaign start date and X days after, where X is the Recovery Days specified

Many of the columns on this report are unique, so there are some column definitions at the bottom of the report in addition to these definitions.

Description

| | |
|-------------------------|---|
| Source | Name of the Source Campaign |
| Start/End | Source Campaign start and end date |
| Distribution Qty | Number of accounts the Source Campaign was sent to |
| Total Expense | The total expense of distributing the Source Campaign |
| Responses | For non-Upsell Client Source Campaigns, a response is a lead, converted lead, or client whose Source matches the Client Source Campaign's Source and whose Lead Acquired Date (or Client Since Date) falls into the Client Source Campaign's date range. For Upsell Client Source Campaigns, a response is a lead, converted lead, or client who had any number of Estimates or Jobs with the same Source as the Client Source Campaign's Source and whose Estimate Date or Date Sold falls into the Client Source Campaign's date range. |
| Cost per Lead | The Source Campaign's Total Expenses per Response |
| Sales | The number of sales that are a converted lead or client |

| | |
|---------------------------|---|
| Conversion Rate | The percentage of total recipients that become a client based on this Sales Campaign |
| Cost per Sale | Calculated based on the Client Source Campaign's Total Expenses per converted Lead or Client |
| ROI % | Return On Investment percentage – calculated as a percentage of profit earned $(ROI \$ \text{ Total Expense}) / \text{ Total Expense}$ |
| ROI \$ | Return On Investment invoices for non-Upsell Client Source Campaigns, this is the sum of all invoices (pre-tax). For Upsell Client Source Campaigns, this is the sum of all invoiced jobs sold in the campaign. |
| Response Rate | The number of responses proportional to the distribution quantity, $\text{Responses} / \text{Distribution Quantity}$ |
| Avg Recovery \$ | Calculated based on Return on ROI \$ per Sale, between the campaign start date and X days after, where X is the Recovery Days specified |
| Avg Retention Days | The average number of days a converted lead or client was active until they cancelled |

Client Report By Completed Jobs

This report lists clients who had visits completed on a certain day or time frame. You can filter by date and by clients who have an email address on file.

The screenshot shows the 'SA Report' interface with the following components:

- Navigation:** My Day, CRM, Scheduling, Accounting, Marketing, Team, Reports.
- Report Title:** Client Report by Completed Jobs
- Filter Range:** Wednesday, January 1, 2020 Through Tuesday, September 15, 2020
- Filter By:** Start Date: 1/1/2020, End Date: 9/15/2020, Only show clients with emails
- Actions:** Refresh, Print, Export to Excel
- Table:** A table with columns: Client Name, Address, City, State, Postal Code, Email, Client Since.
- Page Info:** Page 1 of 2
- HELP** button in the bottom right corner.

| Client Name | Address | City | State | Postal Code | Email | Client Since |
|--------------------|----------------------------------|------------|-------|-------------|--|--------------|
| Alan Collins | 3924 Mission Ridge Rd | Plano | TX | 75023 | srabbott@comcast.net | 12/12/2003 |
| Alli LaDor | 197 Ardica Lane | S Garland | TX | 4077 | alliclar@yahoo.com | 11/22/2012 |
| Allen Area | 1413 Cibola Dr | Allen | TX | 75013 | joseph.hrback@gmail.com | 10/7/2016 |
| Andrew Luck | 26 Pinewood Lane | Rowlett | TX | 4040 | btair1@air2diagnostics.com | 3/2/2002 |
| Barnes, Dusty | 1251 E Belt Line Rd | Richardson | TX | 75081 | test@example.com; test@test.com | 3/23/2018 |
| Barter Bill | New Address | Allen | TX | 75013 | jhrback@utdallas.edu; jhrback1@utdallas.edu | 7/28/2016 |
| Ben Roethlisberger | 347 Gore Rd | Frisco | TX | 4055 | bigben@yahoo.com | 12/5/2016 |
| Bert Stevenson | 9 10 Smith Lane/Thompson Pt | Frisco | TX | 4055 | bigstoo@gmail.com | 3/1/1997 |
| Big Cheese | 1402 San Saba Ct | Allen | TX | 75013 | joseph.hrback@serviceautopilot.com | 10/7/2016 |
| Bill Custom | 1408 San Saba Ct Allen TX, 75013 | Allen | TX | 75013 | billcustom.org | 8/4/2016 |
| Bobby Smacko | 1224 Concho Dr | Allen | TX | 75013 | bsmack@goodgrief.org | 7/25/2016 |
| Cara Hewitt | 172 Richardson Cape Rd | Richardson | TX | 4071 | jralen15@yahoo.com | 12/17/2008 |
| Charles Clay | 4 Smith Lane | Frisco | TX | 4055 | kanderson@genesishosp.org; jaykrisanderson@comcast.net | 5/21/2005 |
| Chuck Davis | 150 Lakewood Rd | Garland | TX | 4015 | chuckdavis@yahoo.com | 6/9/2018 |
| Cottonwood Park | 1301 W Belt Line Rd | Richardson | TX | 75080 | email@one.org | 9/13/2019 |
| Dalvin Cook | 102 Frisco Rd | Rowlett | TX | 4040 | libbyarstrong380@gmail.com | 11/15/2011 |
| David Niska | 31 Maxwell Rd | Frisco | TX | 4055 | izzyzer@gmail.com | 10/15/2014 |
| Denise Collins | 3333 Remington Dr | Plano | TX | 75023 | dcollins@qwi.net | 7/1/1997 |
| Diag Baldevin | 2520 Ashington Ct | Plano | TX | 75023 | bhays@valtec.com | 4/29/2020 |
| Evan Ingram | 19 Garden Lane | Frisco | TX | 4055 | theresebergstrom@gmail.com | 1/25/2004 |
| George Morris | 1401 Cibola Dr | Allen | TX | 75013 | | 10/10/2016 |
| Hart, Monique | 2405 Acacia St | Richardson | TX | 75082 | test@example.com | 3/23/2018 |
| Jack Doyle | 63 Meadow Rd | Richardson | TX | 4071 | rblondin7@gmail.com | 4/1/2016 |
| Jared Cook | 44 Waffle Rd | Frisco | TX | 4055 | raver@clavo.comcast.net | 6/8/2017 |
| Jim Jackson | 747 Meadow Rd | Garland | TX | 4015 | jackson@gmail.com | 7/6/2018 |

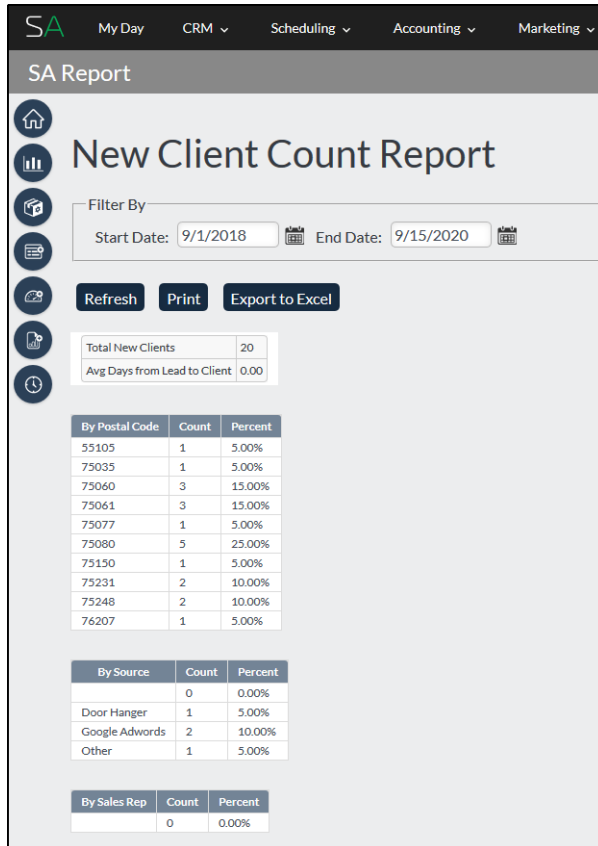
Description

The columns display basic Account information as well as the Client Since date.

What's Not Included: services during a visit.

New Client Count Report

This report lists new clients grouped by postal code, source, and Sales Representative within a specific time frame.



SA Report

New Client Count Report

Filter By

Start Date: 9/1/2018 End Date: 9/15/2020

Refresh Print Export to Excel

Total New Clients: 20
Avg Days from Lead to Client: 0.00

| By Postal Code | Count | Percent |
|----------------|-------|---------|
| 55105 | 1 | 5.00% |
| 75035 | 1 | 5.00% |
| 75060 | 3 | 15.00% |
| 75061 | 3 | 15.00% |
| 75077 | 1 | 5.00% |
| 75080 | 5 | 25.00% |
| 75150 | 1 | 5.00% |
| 75231 | 2 | 10.00% |
| 75248 | 2 | 10.00% |
| 76207 | 1 | 5.00% |

| By Source | Count | Percent |
|----------------|-------|---------|
| | 0 | 0.00% |
| Door Hanger | 1 | 5.00% |
| Google Adwords | 2 | 10.00% |
| Other | 1 | 5.00% |

| By Sales Rep | Count | Percent |
|--------------|-------|---------|
| | 0 | 0.00% |

Description

Rather than a single table of columns, you'll see four different tables. The first one lists the total of new client Accounts and the average conversation from lead to client. The following tables show those same Accounts listed by postal code, source, and Sales Rep.

New Clients Report

This report lists new clients within a specific time frame. You can filter by date, status, and Sales Rep.

The screenshot shows the 'SA Report' interface for 'New Clients 9/1/2018 to 9/30/2020'. The filter section is set to 'Start Date: 9/1/2018', 'End Date: 9/30/2020', 'Status: Active', and 'Sales Rep:'. The table below lists 20 client records.

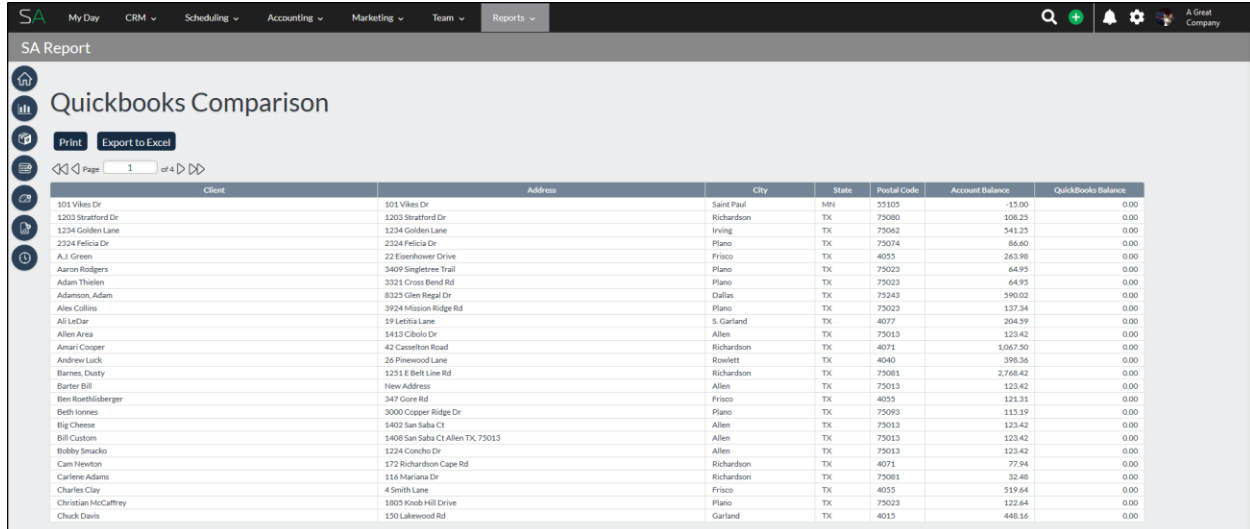
| Client Name | Address | City | State | Postal Code | Source | Sales Rep | Client Since | Status |
|--------------------|--------------------------------|------------------|-------|-------------|----------------|-----------|--------------|--------|
| Collins, Alex | 407 Highland Ave | Highland Village | TX | 75077 | Google Adwords | | 8/27/2019 | Active |
| Cottonwood Park | 1301 W Belt Line Rd | Richardson | TX | 75080 | | | 9/13/2019 | Active |
| Doone, Lorna | 8384 Ayworth Drive | Prisco | TX | 75025 | | | 3/4/2020 | Active |
| Emerson, Ralph | 701 Nottingham Dr | Richardson | TX | 75080 | | | 3/13/2019 | Active |
| Jennifer Homeowner | 1201 Richardson Dr | Richardson | TX | 75080 | | | 1/9/2019 | Active |
| Knobbo, Bubbo | 455 Hamline Ave S | Saint Paul | MN | 55105 | | | 10/15/2018 | Active |
| Rodgers, Aaron | 135 Main Street | Dallas | TX | 75231 | | | 7/19/2019 | Active |
| SAS Client 1 | 1627 W 3rd St | Irving | TX | 75060 | | | 10/24/2018 | Active |
| SAS Client 2 | 1334 Silvio Smith Dr | Irving | TX | 75061 | | | 10/24/2018 | Active |
| SAS Client 3 | 802 Rindie St | Irving | TX | 75060 | | | 10/24/2018 | Active |
| SAS Client 4 | 2926 St Lo Dr | Irving | TX | 75060 | | | 10/24/2018 | Active |
| SAS Client 5 | 809 N Main St | Irving | TX | 75061 | | | 10/24/2018 | Active |
| SAS Client 6 | 3209 Endres St | Irving | TX | 75061 | | | 10/24/2018 | Active |
| Sample Client | 7606 Kevin Dr | Dallas | TX | 75248 | | | 10/23/2018 | Active |
| Smith, Bill | 155 Main Street | Dallas | TX | 75231 | | | 7/19/2019 | Active |
| Smith, Mary | 1645 North Town East Boulevard | Mesquite | TX | 75150 | | | 4/29/2020 | Active |
| South Entrance | 3831 Airport Rd | Denton | TX | 76207 | Other | | 8/30/2019 | Active |
| Thompson, Bob | 4567 Plano Rd | Plano | TX | 75080 | Google Adwords | | 12/5/2018 | Active |
| White, James | 1201 Richardson Dr | Richardson | TX | 75080 | | | 12/4/2018 | Active |
| Winger, John | 7601-7605 Pennyburn Dr | Dallas | TX | 75248 | Door Hanger | | 9/13/2018 | Active |

Description

The columns display basic Account information, the Source of the Account, Sales Rep on the Account, the date the Account was designated a client, and the status (active or inactive).

QuickBooks Comparison Report

This report lists any discrepancies between QuickBooks Desktop and SA. This report applies to QuickBooks Desktop only and is not functional with QuickBooks Online.



| Client | Address | City | State | Postal Code | Account Balance | QuickBooks Balance |
|---------------------|----------------------------------|------------|-------|-------------|-----------------|--------------------|
| 101 Vikes Dr | 101 Vikes Dr | Saint Paul | MN | 55105 | -15.00 | 0.00 |
| 1203 Stratford Dr | 1203 Stratford Dr | Richardson | TX | 75080 | 108.23 | 0.00 |
| 1234 Golden Lane | 1234 Golden Lane | Irving | TX | 75042 | 341.23 | 0.00 |
| 2324 Felicia Dr | 2324 Felicia Dr | Plano | TX | 75074 | 86.60 | 0.00 |
| A.J. Green | 22 Eisenhower Drive | Frisco | TX | 4055 | 263.98 | 0.00 |
| Aaron Rodgers | 3409 Singletree Trail | Plano | TX | 75023 | 64.93 | 0.00 |
| Adam Thibien | 3321 Cross Bend Rd | Plano | TX | 75023 | 64.93 | 0.00 |
| Adamsen, Adam | 8323 Glen Regal Dr | Dallas | TX | 75243 | 990.02 | 0.00 |
| Alex Collins | 3924 Mission Ridge Rd | Plano | TX | 75023 | 137.34 | 0.00 |
| Ali LeDar | 19 Letitia Lane | S. Garland | TX | 4077 | 204.39 | 0.00 |
| Allen Area | 1413 Cibolo Dr | Allen | TX | 75013 | 123.42 | 0.00 |
| Amari Cooper | 42 Caswellton Road | Richardson | TX | 4071 | 1,067.30 | 0.00 |
| Andrew Luck | 26 Rosewood Lane | Rowlett | TX | 4040 | 390.36 | 0.00 |
| Barnes, Dusty | 1251 E Belt Line Rd | Richardson | TX | 75081 | 3,766.42 | 0.00 |
| Barter Bill | New Address | Allen | TX | 75013 | 123.42 | 0.00 |
| Ben Roethlisberger | 347 Gore Rd | Frisco | TX | 4055 | 121.31 | 0.00 |
| Beth Jones | 3000 Copper Ridge Dr | Plano | TX | 75093 | 115.19 | 0.00 |
| Big Cheese | 1402 San Saba Ct | Allen | TX | 75013 | 123.42 | 0.00 |
| Bill Custom | 1408 San Saba Ct Allen TX, 75013 | Allen | TX | 75013 | 123.42 | 0.00 |
| Bobby Smacko | 1234 Concho Dr | Allen | TX | 75013 | 123.42 | 0.00 |
| Cam Newton | 172 Richardson Cape Rd | Richardson | TX | 4071 | 77.94 | 0.00 |
| Carlene Adams | 116 Mariana Dr | Richardson | TX | 75081 | 32.48 | 0.00 |
| Charles Clay | 4 Smith Lane | Frisco | TX | 4055 | 519.64 | 0.00 |
| Christian McCaffrey | 1805 Knob Hill Drive | Plano | TX | 75023 | 123.44 | 0.00 |
| Chuck Davis | 150 Lakewood Rd | Garland | TX | 4015 | 448.16 | 0.00 |

Description

The report displays client information, the Account Balance (in SA), and the QuickBooks Balance.

What it doesn't do: automatically update.

You must update this report manually: In the QuickBooks Sync Connector, click the button at the top of the window labelled **Update Balance Report**.

This function can take a significant amount of time, particularly if you have a long history between the two systems. It will query every account in each system, active or inactive, to get the balance in each system.

If your sync is generally quick, updating the Balance Report might seem very slow. Items should continue scrolling through the status bar at the bottom left of the window as the update progresses.

Terminations Report

A list of clients who've cancelled their account with your company, including the reason and date. You can filter by date range, reason, and Sales Representative.

The screenshot displays the 'SA Report' interface for 'New Terminations 9/1/2018 to 9/30/2020'. The interface includes a navigation bar at the top with options like 'My Day', 'CRM', 'Scheduling', 'Accounting', 'Marketing', 'Team', and 'Reports'. Below the navigation bar, there are filter options for 'Start Date' (9/1/2018), 'End Date' (9/30/2020), and 'Reasons' (Select options). There are also buttons for 'Refresh', 'Print', and 'Export to Excel'. A table shows the following data:

| Client Name | Address | Sales Rep | Client Since | Termination Date | Termination Reason |
|-----------------|-------------------|-----------|--------------|------------------|--------------------|
| Charles, RuPaul | 3612 Pershing Ave | | 6/29/2018 | 9/9/2020 | Dropping Customer |
| Derrius Guice | 11 Pierce Dr | | 8/1/2016 | 8/27/2019 | Other |

To the right of the table is a pie chart showing the distribution of termination reasons. The chart is split into two equal halves: a teal half representing 'Dropping Customer' and a yellow half representing 'Other'.

Description

The report displays client information including the termination date and reason. The pie chart shows cancellations by reason.

A reason is required when cancelling an Account. You can customize these by going to **Settings > Cancellation Reasons**.

Estimate Reports

Estimates by Stage Report

This report shows a list of all estimates within a certain time period according to their stage. It also shows the *probability* assigned to each estimate—how likely is the estimate to be won or lost? You can filter by date, Sales Rep, Estimate Stage, Estimate Reason, or Custom Field.

| Stage | Est. Value | Client Type | Source | Prob % | Fiscal Period | Age | Estimate Date | Created | Client Name | Postal Code | Map Code | Sales Rep |
|--------------|------------|-------------|----------------|---------|---------------|-----|---------------|-----------|---------------|-------------|----------|-----------|
| Closed - Won | \$773.00 | | | | | | | | | | | |
| Closed - Won | \$120.00 | Client | | 100.00% | Q3-2020 | 1 | 8/31/2020 | 8/31/2020 | David Johnson | 75023 | | |
| Closed - Won | \$184.00 | Client | Google Adwords | 100.00% | Q3-2020 | 4 | 8/28/2020 | 8/28/2020 | Collins, Alex | 75077 | | |
| Closed - Won | \$469.00 | Client | | 100.00% | Q3-2020 | 4 | 8/28/2020 | 8/28/2020 | Cameron Brate | 4040 | | |

Description

| | |
|----------------------|---|
| Stage | Stage of the Estimate |
| Est. value | Estimated value for the Estimate |
| Client Type | The account type of “client” or “lead” |
| Source | Source of the account |
| Prob % | How likely is the Estimate to be won. The probability percentage is set globally for each estimate stage in Settings > CRM > Estimate Stages |
| Fiscal Period | Fiscal quarter and year |
| Age | Age of the estimate in days |
| Estimate Date | Date on the estimate |
| Client Name | Client name |
| Postal Code | Zip code for the client |
| Map Code | Any Map Code assigned to the client |
| Sales Rep | Sales Representative assigned to the estimate |

Estimated Value Versus Actual Value Report

This report shows how much was collected for services on the estimate versus the original estimated value of the Services. It can be filtered by date, service, status, and sales rep.

| Client Name | Client Address | Estimate # | Estimate Won Date | Estimated Value | Service Name | Status | Service Date | Service Value | Sales Rep |
|-----------------|--------------------------------------|------------|-------------------|-----------------|-------------------------|------------------|--------------|---------------|-------------|
| David Johnson | 3916 Hatherly Dr. Plano, TX 75023 | 30 | 8/31/2020 | \$0.00 | Bed Maintenance | Dispatched | 9/1/2020 | \$75.00 | |
| David Johnson | 3916 Hatherly Dr. Plano, TX 75023 | 30 | 8/31/2020 | \$0.00 | Flower Bed Weed Control | Dispatched | 9/1/2020 | \$0.00 | |
| David Johnson | 3916 Hatherly Dr. Plano, TX 75023 | 30 | 8/31/2020 | \$0.00 | Flower Installation | Dispatched | 9/1/2020 | \$100.00 | |
| David Johnson | 3916 Hatherly Dr. Plano, TX 75023 | 30 | 8/31/2020 | \$0.00 | Shrub Trimming | Dispatched | 9/1/2020 | \$0.00 | |
| Cameron Brate | 110 Alpine Village Rowlett, TX 4040 | 29 | 8/28/2020 | \$66.00 | Flower Bed Weed Control | Waiting List | 8/28/2020 | \$66.00 | |
| Cameron Brate | 110 Alpine Village Rowlett, TX 4040 | 29 | 8/28/2020 | \$75.00 | Bed Maintenance | Waiting List | 8/28/2020 | \$0.00 | |
| Cameron Brate | 110 Alpine Village Rowlett, TX 4040 | 29 | 8/28/2020 | \$108.00 | Flower Installation | Waiting List | 8/28/2020 | \$0.00 | |
| Cameron Brate | 110 Alpine Village Rowlett, TX 4040 | 29 | 8/28/2020 | \$108.00 | Shrub Trimming | Waiting List | 8/28/2020 | \$108.00 | |
| Delanie Walker | 51 East Shore Dr Rowlett, TX 4040 | 26 | 5/11/2020 | \$124.00 | Air Quality Inspection | Pending Dispatch | 5/12/2020 | \$124.00 | Morgan, Joe |
| Delanie Walker | 51 East Shore Dr Rowlett, TX 4040 | 25 | 4/10/2020 | \$124.00 | Air Quality Inspection | Pending Dispatch | 4/12/2020 | \$124.00 | |
| Hamasaki, Yuhua | 13525 Brookgreen Dr Dallas, TX 75240 | 3 | 4/25/2018 | \$7.00 | Mowing Package | Completed | 8/1/2018 | \$7.00 | |
| Hamasaki, Yuhua | 13525 Brookgreen Dr Dallas, TX 75240 | 3 | 4/25/2018 | \$8.50 | Mowing Package | Dispatched | 9/4/2018 | \$8.50 | |

Description

- Estimated Value** Rate for the service total after discount and before tax)
- Service Name** Service name (services within a specific visit are divided into individual reports)
- Status** Status of the scheduled job from the estimate
- Service Value** The rate on the service (not including tax or discounts)
- Sales Rep** Sales Representative assigned to the estimate

Won Estimates by Service Report

This report shows won estimates grouped by service type. You can filter by date range, service, and Sales Rep.

The screenshot shows the 'SA Report' interface for 'Won Estimates By Service'. The filter section includes 'Start Date: 8/30/2020', 'End Date: 9/5/2020', and a 'Service' dropdown. Below the filters are 'Refresh', 'Print', and 'Export to Excel' buttons. The table below shows the following data:

| Client Name | Client Address | Estimate # | Description | Estimate Won Date | Estimate Value | Service Name | Quantity | Rate | Budgeted Hours | Estimated Cost | Sales Rep |
|---------------|-----------------------------------|------------|--|-------------------|----------------|-------------------------|----------|----------|----------------|----------------|-----------|
| David Johnson | 3916 Hatherly Dr. Plano, TX 75023 | 30 | Copy of Estimate - Friday, August 28, 2020 | 8/31/2020 | \$120.00 | Shrub Trimming | 1.0000 | \$108.00 | 0.0000 | \$0.00 | |
| David Johnson | 3916 Hatherly Dr. Plano, TX 75023 | 30 | Copy of Estimate - Friday, August 28, 2020 | 8/31/2020 | \$120.00 | Bed Maintenance | 1.0000 | \$75.00 | 0.0000 | \$0.00 | |
| David Johnson | 3916 Hatherly Dr. Plano, TX 75023 | 30 | Copy of Estimate - Friday, August 28, 2020 | 8/31/2020 | \$120.00 | Flower Bed Weed Control | 1.0000 | \$66.00 | 0.0000 | \$0.00 | |
| David Johnson | 3916 Hatherly Dr. Plano, TX 75023 | 30 | Copy of Estimate - Friday, August 28, 2020 | 8/31/2020 | \$120.00 | Flower Installation | 1.0000 | \$100.00 | 0.0000 | \$0.00 | |

Description

The report lists the estimate number and services.

Estimate Won Date Date the estimate was won, or if it was won multiple times, the latest date appears

Estimate Value The subtotal of the estimate before tax and after discount (job costing is not considered)

What's Not Included: Package jobs and waiting list visits.

Won Estimates Service Products Report

This report shows estimates and which products are attached to them. You can filter by date range, services, products, and Sales Rep.

| Client Name | Client Address | Estimate # | Description | Estimate Won Date | Estimate Value | Service Name | Product Name | Quantity | Rate | Estimated Hours | Estimated Cost | Sales Rep |
|---------------|--------------------------------------|------------|--|-------------------|----------------|---------------------|---------------|----------|---------|-----------------|----------------|-----------|
| David Johnson | 29154 Hutter's Dr. Plano, TX 75023 | 30 | Copy of Estimate - Friday, August 28, 2020 | 8/31/2020 | \$120.00 | Flower Installation | Flower Flat A | 8.0000 | \$15.00 | 0.1000 | \$11.50 | |
| Cameron Brate | 110 Alpine Village Rowlett, TX 75040 | 29 | Estimate - Friday, August 28, 2020 | 8/28/2020 | \$469.00 | Flower Installation | Flower Flat B | 6.0000 | \$30.00 | 0.1000 | \$14.00 | |

Description

Estimate Won Date Date estimate was marked as won

Estimate Value The subtotal of the estimate before tax and after discount (job costing is not considered)

Service Name Services within a specific visit are divided into individual reports

Financial Reports

Credit Report

This report is a list of Account credits within a specified date range.

The screenshot shows the 'SA Report' interface with a 'Credit Report' filter. The report displays a table of account credits with the following data:

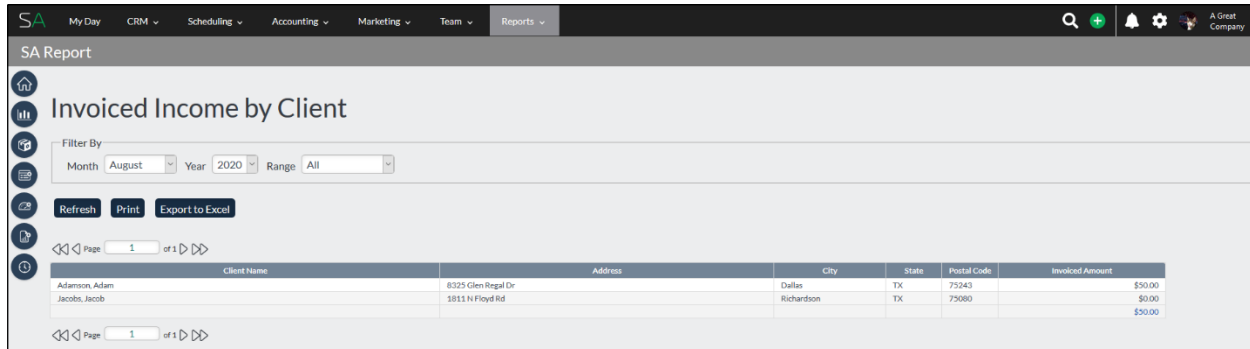
| Credit Date | Ref Number | Client | Address | City | Invoices | Description | Amount |
|-------------|------------|--------------------|--------------------|------------|----------|---|----------|
| 9/21/2018 | 101 | O'Hara, Asia | 170 W. Campbell Rd | Richardson | 112 | | \$100.00 |
| 8/30/2019 | 111 | Cosell, Howard | 200 Rochelle Dr. | Irving | | | \$30.00 |
| 10/29/2019 | CC Refund | Amari Cooper | 42 Casselton Road | Richardson | | Overpayment Refund for Payment Date: 10/16/2019 | \$3.00 |
| 10/29/2019 | 110486 | Greg Olsen | 8 Beach Rd | Richardson | | Credit for yard damage | \$66.00 |
| 10/29/2019 | CC Refund | Camaron Brate | 110 Alpine Village | Roadsett | | Overpayment Refund for Payment Date: 10/28/2019 | \$60.62 |
| 10/31/2019 | 1 | Ben Boethlisberger | 347 Gore Rd | Frisco | | | \$66.00 |
| 2/10/2020 | 2-10-2020 | Schott, Marge | 1405 Cibolo Dr | Allen | 133 | | \$15.00 |
| 2/10/2020 | 2-10-2020 | Schott, Marge | 101 Vikes Dr | Saint Paul | | | \$15.00 |
| 2/19/2020 | CC Refund | Smith, Jim | 1229 E Main St | Allen | | Full/Partial Refund for Payment Date: 2/10/2020 | \$38.00 |

Description

This report can be helpful to identify Accounts with unapplied Credits. It shows the Credit date and reference number, the client Account information, any Invoices that are applied to the Credit, the description entered on the Credit Memo, and the amount of the credit.

Invoiced Income by Client Report

This report is a list of invoiced totals by client, month, year, and invoiced amount range. You can filter by month, year, and range of dollar amounts.



SA Report

Invoiced Income by Client

Filter By

Month: August Year: 2020 Range: All

Refresh Print Export to Excel

Page 1 of 1

| Client Name | Address | City | State | Postal Code | Invoiced Amount |
|---------------|--------------------|------------|-------|-------------|-----------------|
| Adamson, Adam | 8325 Glen Regal Dr | Dallas | TX | 75243 | \$50.00 |
| Jacobs, Jacob | 1811 N Floyd Rd | Richardson | TX | 75080 | \$0.00 |
| | | | | | \$50.00 |

Page 1 of 1

Description

The columns in the table display the client information and the total invoiced amount for the selected month. There is a cumulative total at the bottom of the table.

Invoiced Amount The sum of all invoice subtotals for a client for the month (before tax and after discounts). The total invoiced amount for all clients is listed at the bottom.

Invoiced Products Report

This report shows any invoices that used one or more products charged to the client in a defined time frame. You can also filter by Sales Rep and Product:

The screenshot shows the 'SA Report' interface for the 'Invoiced Products Report'. At the top, there is a navigation bar with options like 'My Day', 'CRM', 'Scheduling', 'Accounting', 'Marketing', 'Team', and 'Reports'. Below the navigation bar, the report title 'Invoiced Products Report' is displayed. A filter section allows users to specify a 'Start Date' (8/1/2018), 'End Date' (8/27/2020), 'Sales Rep', and 'Product'. There are buttons for 'Refresh', 'Print', and 'Export to Excel'. Below the filters, a table displays the report data. The table has columns for 'Invoice Date', 'Invoice #', 'Name', 'Quantity', 'Price', 'Total', and 'Sales Rep'. The data includes various products like 'Flower Flat A', 'Snow Sodium Ice Melt - 10 Bag', 'Fertilizer', 'Drive XL RB Herbicide', 'Lawn Bags', and 'Cedar Mulch (5 cu. yd.)' with their respective quantities and prices.

| Invoice Date | Invoice # | Name | Quantity | Price | Total | Sales Rep |
|--------------|-----------|-------------------------------|----------|---------|----------|-----------|
| 8/1/2018 | 143 | Flower Flat A | 1.0000 | \$15.00 | \$15.00 | |
| 9/14/2018 | 164 | Snow Sodium Ice Melt - 10 Bag | 1.0000 | \$13.00 | \$13.00 | |
| 10/4/2018 | 172 | Fertilizer | 3.0000 | \$7.50 | \$22.50 | |
| 4/6/2019 | 200 | Drive XL RB Herbicide | 1.0000 | \$6.00 | \$6.00 | |
| 10/28/2019 | 229 | Snow Sodium Ice Melt - 10 Bag | 1.0000 | \$13.00 | \$13.00 | |
| 10/28/2019 | 231 | Snow Sodium Ice Melt - 10 Bag | 1.0000 | \$13.00 | \$13.00 | |
| 11/30/2019 | 243 | Lawn Bags | 6.0000 | \$6.00 | \$36.00 | |
| 12/5/2019 | 292 | Product 1 | 1.0000 | \$8.00 | \$8.00 | |
| 12/7/2019 | 288 | Lawn Bags | 4.0000 | \$6.00 | \$24.00 | |
| 12/31/2019 | 293 | Lawn Bags | 4.0000 | \$6.00 | \$24.00 | |
| 12/31/2019 | 297 | Lawn Bags | 3.0000 | \$6.00 | \$18.00 | |
| 12/31/2019 | 298 | Cedar Mulch (5 cu. yd.) | 2.0000 | \$17.00 | \$34.00 | |
| 2/29/2020 | 372 | Cedar Mulch (5 cu. yd.) | 4.0000 | \$17.00 | \$68.00 | |
| 3/14/2020 | 387 | Cedar Mulch (5 cu. yd.) | 15.0000 | \$17.00 | \$255.00 | |
| 3/25/2020 | 393 | Lawn Bags | 4.0000 | \$6.00 | \$24.00 | |
| 3/28/2020 | 397 | Lawn Bags | 2.0000 | \$6.00 | \$12.00 | |
| 3/30/2020 | 375 | Lawn Bags | 4.0000 | \$6.00 | \$24.00 | |
| 3/31/2020 | 386 | Lawn Bags | 6.0000 | \$6.00 | \$36.00 | |
| 3/31/2020 | 391 | Cedar Mulch (5 cu. yd.) | 8.0000 | \$17.00 | \$136.00 | |
| 3/31/2020 | 391 | Flower Flat A | 12.0000 | \$15.00 | \$180.00 | |
| 3/31/2020 | 394 | Cedar Mulch (5 cu. yd.) | 6.0000 | \$17.00 | \$102.00 | |
| 3/31/2020 | 394 | Flower Flat A | 8.0000 | \$15.00 | \$120.00 | |
| 3/31/2020 | 395 | Lawn Bags | 2.0000 | \$6.00 | \$12.00 | |
| 3/31/2020 | 398 | Black Mulch (5 cu. yd.) | 10.0000 | \$22.00 | \$220.00 | |

Description

The columns display the Invoice date and number, the Product name, quantity, price per unit, total (Quantity times Price), and the Sales Rep who sold the Product(s) (on the Visit record for the Product).

Invoices with Balances Report

This report shows a list of invoices that are open or past due, and the amount owed by the client. You can filter the report by date range.

The screenshot shows the 'SA Report' interface for 'Invoices with Balances'. The filter section is set to 'Filter By' with a date range from 1/1/2020 to 8/31/2020. The table below lists 32 invoices with columns for Invoice #, Date, Client, Address, City, State, Postal Code, Invoice Total, and Status. All invoices listed are marked as 'Past Due'.

| Invoice # | Date | Client | Address | City | State | Postal Code | Invoice Total | Status |
|-----------|-----------|--------------------|-----------------------|------------|-------|-------------|---------------|----------|
| 370 | 2/26/2020 | 1234 Golden Lane | 1234 Golden Lane | Irving | TX | 75062 | \$541.25 | Past Due |
| 438 | 7/12/2020 | Adamson, Adam | 8325 Glen Regal Dr | Dallas | TX | 75243 | \$50.00 | Past Due |
| 442 | 8/12/2020 | Adamson, Adam | 8325 Glen Regal Dr | Dallas | TX | 75243 | \$50.00 | Past Due |
| 434 | 6/12/2020 | Adamson, Adam | 8325 Glen Regal Dr | Dallas | TX | 75243 | \$50.00 | Past Due |
| 386 | 3/31/2020 | Alex Collins | 3924 Mission Ridge Rd | Plano | TX | 75023 | \$64.97 | Past Due |
| 393 | 3/26/2020 | Ali LeDar | 19 Letitia Lane | S. Garland | TX | 4077 | \$204.99 | Past Due |
| 366 | 2/29/2020 | Allen Area | 1413 Cibolo Dr | Allen | TX | 75013 | \$41.14 | Past Due |
| 325 | 1/31/2020 | Allen Area | 1413 Cibolo Dr | Allen | TX | 75013 | \$41.14 | Past Due |
| 421 | 4/30/2020 | Allen Area | 1413 Cibolo Dr | Allen | TX | 75013 | \$41.14 | Past Due |
| 399 | 3/31/2020 | Andrew Lark | 28 Pinewood Lane | Rowlett | TX | 4040 | \$398.56 | Past Due |
| 400 | 3/31/2020 | Barnes, Dusty | 1251 E Belt Line Rd | Richardson | TX | 75081 | \$108.25 | Past Due |
| 439 | 7/31/2020 | Barnes, Dusty | 1251 E Belt Line Rd | Richardson | TX | 75081 | \$108.25 | Past Due |
| 431 | 5/31/2020 | Barnes, Dusty | 1251 E Belt Line Rd | Richardson | TX | 75081 | \$108.25 | Past Due |
| 371 | 2/29/2020 | Barnes, Dusty | 1251 E Belt Line Rd | Richardson | TX | 75081 | \$108.25 | Past Due |
| 425 | 6/30/2020 | Barnes, Dusty | 1251 E Belt Line Rd | Richardson | TX | 75081 | \$108.25 | Past Due |
| 426 | 4/30/2020 | Barnes, Dusty | 1251 E Belt Line Rd | Richardson | TX | 75081 | \$108.25 | Past Due |
| 387 | 3/14/2020 | Barnes, Dusty | 1251 E Belt Line Rd | Richardson | TX | 75081 | \$306.04 | Past Due |
| 335 | 1/31/2020 | Barnes, Dusty | 1251 E Belt Line Rd | Richardson | TX | 75081 | \$108.25 | Past Due |
| 418 | 4/30/2020 | Barter Bill | New Address | Allen | TX | 75013 | \$41.14 | Past Due |
| 328 | 1/31/2020 | Barter Bill | New Address | Allen | TX | 75013 | \$41.14 | Past Due |
| 363 | 2/29/2020 | Barter Bill | New Address | Allen | TX | 75013 | \$41.14 | Past Due |
| 338 | 2/10/2020 | Ben Roethlisberger | 347 Gore Rd | Frisco | TX | 4055 | \$36.00 | Past Due |
| 374 | 3/2/2020 | Ben Roethlisberger | 347 Gore Rd | Frisco | TX | 4055 | \$36.00 | Past Due |
| 361 | 2/29/2020 | Big Cheese | 1402 San Sabá Ct | Allen | TX | 75013 | \$41.14 | Past Due |
| 321 | 1/31/2020 | Big Cheese | 1402 San Sabá Ct | Allen | TX | 75013 | \$41.14 | Past Due |

Description

The table provides the invoice number and date, client information, the total amount invoiced (post-tax), and the status of the invoice (open or past due).

Pre-Payments Report

This report shows all pre-payments in a defined time frame, including the payment amount, amount used, and amount left over. There is a date filter and a filter to set the smallest unused amount that will display in the report.

The screenshot shows the 'SA Report' interface for 'Pre-Payments'. The top navigation bar includes 'My Day', 'CRM', 'Scheduling', 'Accounting', 'Marketing', 'Team', and 'Reports'. The report title is 'SA Report' and the main heading is 'Pre-Payments'. Below the heading, there is a 'Filter By' section with 'Start Date' set to '1/1/2020', 'End Date' set to '8/31/2020', and 'Where Unused Amount Greater Than' set to '0.00'. There are buttons for 'Refresh', 'Print', and 'Export to Excel'. Below the filters, there is a pagination control showing 'Page 1 of 1'. The main data is presented in a table with the following columns: Client, Address, City, State, Postal Code, Amount, Used Amount, and Unused Amount. The table contains one data row for 'Bert Stevenson' and a 'Total' row.

| Client | Address | City | State | Postal Code | Amount | Used Amount | Unused Amount |
|----------------|-----------------------------|--------|-------|-------------|----------|-------------|---------------|
| Bert Stevenson | 9-10 Smith Lane/Thompson Pt | Frisco | TX | 4055 | 1,000.00 | 133.15 | 866.85 |
| Total | | | | | 1,000.00 | 133.15 | 866.85 |

Description

In addition to the items mentioned above, this report also lists basic client information and totals at the bottom of the table.

Profit/Loss – Accrual Basis Report

This report shows earned revenue that's received and expected to be received, by the date range you specify. Accepting a payment will not affect the services listed on this report.

| Type | SubType | Name | Amount | |
|-------------------------|-----------------|-------------------------------|------------|--------------------------|
| Income | Contracts | Edging | \$700.00 | |
| | | Lawn Care Maintenance | \$100.00 | |
| | | Snow Contract Agreement | \$350.00 | |
| | Contracts Total | | \$1,150.00 | |
| | Services | Bed Maintenance | \$1,568.53 | |
| | | Fall Clean Up | | |
| | | Flower Bed Weed Control | \$55.00 | |
| | | Flower Installation | \$1,500.00 | |
| | | Lawn Care Maintenance | \$1,938.00 | |
| | | Lawn Mowing | \$2,217.28 | |
| | | Monthly Maintenance Agreement | | |
| | | Poop Scoop (3/week) | \$95.40 | |
| | | Services Total | | \$7,374.21 |
| | | | Product | All Purpose Weed Control |
| Black Mulch (5 cu. yd.) | \$220.00 | | | |
| Cedar Mulch (5 cu. yd.) | \$561.00 | | | |
| Flower Flat A | \$450.00 | | | |
| Flower Flat B | \$360.00 | | | |
| Lawn Bags | \$108.00 | | | |
| Product Total | | | | \$1,749.00 |
| Income Total | | \$10,273.21 | | |
| Expenses | Expense | Material | (\$200.00) | |
| | | | | Expense Total |
| Expenses Total | | (\$200.00) | | |
| Credits | Credits | Credit | (\$30.00) | |
| | | | | Credits Total |
| Credits Total | | (\$30.00) | | |
| Total Profit | | \$10,043.21 | | |

Description

Type The report instance type, such as "Income"

SubType The subtype as it relates to the type such as "Contracts" or "Services"

Name Name of service, product, discount, or expense

Amount Service, product, discount, or expense amount

Profit/Loss – Cash Basis

This report shows your total profit after tax. The report breaks down service amounts, unapplied payments, products, discounts, expenses, and contract income. You can filter by date range to select the day that payments were accepted.

| Type | SubType | Name | Amount |
|----------------|-----------------------|-------------------------|------------|
| Income | Services | Bed Maintenance | \$90.00 |
| | | Fall Clean Up | |
| | | Flower Bed Weed Control | \$22.00 |
| | | Lawn Care Maintenance | \$76.00 |
| | | Lawn Mowing | \$328.00 |
| | | Poop Scoop (3/week) | \$71.55 |
| | | System Check | |
| | Services Total | | \$635.55 |
| | Unapplied Prets | | \$10.00 |
| | Unapplied Prets Total | | \$10.00 |
| | Pre-Payments | | \$866.85 |
| | Pre-Payments Total | | \$866.85 |
| | Product | Cedar Mulch (5 cu. yd.) | \$68.00 |
| | | Flower Flat A | \$12.00 |
| | | Lawn Bags | \$45.00 |
| | Product Total | | \$125.00 |
| Income Total | | | \$1,628.40 |
| Expenses | Expense | Material | (\$200.00) |
| | Expense Total | | (\$200.00) |
| Expenses Total | | | (\$200.00) |
| Credits | Refunds | Credit Refund | (\$41.14) |
| | Refunds Total | | (\$41.14) |
| Credits Total | | | (\$41.14) |
| Total Profit | | | \$1,387.26 |

Description

Type The report instance type

SubType The subtype as it applies to the type, such as "Contracts" or "Services"

Name Name of service, product, discount, or expense

Amount Amount for the service, product, discount, or expense

Sales Tax Report/Sales Tax Liability Report

This report shows the sales tax collected in a defined time frame. Click any Tax Name to see the Sales Tax Detail report for that tax reference:

SA Report

Sales Tax Liability

Filter By

Start Date: 8/1/2018 End Date: 8/27/2020

Refresh Print Export to Excel

Page 1 of 1

| Tax Name | Total Sales | Non-Taxable Sales | Taxable Sales | Tax Rate | Tax Collected | Tax Payable |
|--------------|-------------------|-------------------|-------------------|----------|-----------------|-----------------|
| Sales Tax | \$573.25 | \$123.25 | \$450.00 | 8.25% | \$37.13 | \$37.13 |
| TX Sales Tax | \$140.00 | \$140.00 | \$0.00 | | \$0.00 | \$0.00 |
| TX Sales Tax | (\$458.76) | (\$417.62) | (\$38.00) | -8.25% | (\$3.14) | (\$3.14) |
| TX Sales Tax | \$5,077.65 | \$318.00 | \$4,759.65 | 8.25% | \$392.72 | \$392.72 |
| Total | \$5,332.14 | \$163.63 | \$5,171.65 | | \$426.71 | \$426.71 |

Page 1 of 1

If the payment is:

- Unapplied** - The report cannot calculate it into a taxable sale.
- Prepayment** - The report will utilize the invoice date rather than the payment date.
- Partial** - The amount of the applied tax will be proportional to the percentage of the amount paid. This statement also applies to non-taxable sales.

The **Total Sales** incorporates the sum of all taxable and non-taxable sales.
A **Credit Memo** will subtract from the taxable sale amount based on the selected date. This statement also applies to non-taxable sales.

Click any **Tax Name** to see the **Sales Tax Detail** report for that tax reference.

Description

Totals are shown at the bottom of the table.

| | |
|--------------------------|---|
| Tax Name | Sales tax name |
| Total Sales | Total of sales for each tax reference (taxable and non-taxable) |
| Non-Taxable Sales | Total of sales that were non-taxable |
| Taxable Sales | Total of sales that were taxable |
| Tax Rate | Tax rate |
| Tax Collected | Tax collected, based on total taxed amount on invoices |
| Tax Payable | The amount to be paid to the given sales tax agency |

Forms

Forms Summary Report

This report is a basic overview of Forms and their submissions. The report collects all data for a given Form and shows individual answers, percentages for each question's answers, and a graphic representation of those percentages.

Click any form name to see a more detailed summary of that form.

| Name | Description | Version | Active | Responses |
|--------------------------|--|---------|--------|-----------|
| Basic Estimate Request | Please let us know what services you would like a quote on. | 1 | Active | 1 |
| Company Review/Survey | Please fill out the requested fields. | 4 | Active | 1 |
| Contact Us | Please enter your contact information below. | 1 | Active | 1 |
| Credit Card Capture Form | All fields are required | 1 | Active | 1 |
| Dog name | Please fill out the required fields! | 1 | Active | 1 |
| Employee Information | | 2 | Active | 1 |
| Equipment Repair Request | | 1 | Active | 1 |
| Join our Mailing List | Please enter your contact information to sign up for our mailing list. | 1 | Active | 1 |
| My Form Name | Please fill out the required fields! | 2 | Active | 1 |
| New Client | Please fill out the required fields! | 4 | Active | 1 |
| Photo Required | take a photo of this jobsite before starting | 1 | Active | 1 |
| Weather Conditions | | 2 | Active | 1 |

Description

You can look at individual Forms to see details, such as individual answers for questions, number of responses, and graphs of response percentages.

Name Name (not title) and description of form – click the name to open detailed view of each report and its metrics

Version Form version number

Active Form status (active or inactive)

Responses Number of form submissions

Click any row in the table to see the **Form Details** report.

SA Report

Form Details

Filter By

Start Date: 8/1/2020 End Date: 8/26/2020

Refresh Print Export to Excel Back

| Form Name | # Submitted |
|------------------------|-------------|
| Basic Estimate Request | 0 |

| Field Name | Field | # Answered |
|-------------------|--------------|--------------|
| Name | Name | 0 |
| Answer | Answer Ratio | Answer Count |
| 0 | 100 0.00% | 0 |
| Address | Address | 0 |
| Answer | Answer Ratio | Answer Count |
| 0 | 100 0.00% | 0 |
| Email | Email | 0 |
| Answer | Answer Ratio | Answer Count |
| 0 | 100 0.00% | 0 |
| Home Phone Number | Phone | 0 |
| Answer | Answer Ratio | Answer Count |
| 0 | 100 0.00% | 0 |

HELP

If your question did not have a standardized answer, click to expand the answers and see a list of each response.

- Any of the yellow boxes indicate that the question does not have fixed answers. That is where you would click to view all responses.
- Any fields highlighted in red mean the field name has been changed since the question was answered.

Job Costing Reports

Cost of Goods Sold

This report shows revenue and cost by Service in a defined time frame, based on each Visit. This report can be filtered by date and Service. Additionally, you can include completed jobs or filter out jobs without recorded times or amounts.

| Name | Cost | B.Hrs | A.Hrs | Gross Sales | Labor Cost | Materials | Direct Cost | Gross Profit | C/M/H | C/M/H/M | A.S/M/H |
|-------------------------------|---------|-------|-------|-------------|------------|------------|-------------|--------------|----------|----------|------------|
| 21" Mower | 0.00% | 0.00 | 0.00 | \$7.00 | \$0.00 | \$0.00 | \$0.00 | \$7.00 | \$0.00 | \$0.00 | \$0.00 |
| Air Quality Inspection | 0.00% | 0.00 | 0.00 | \$248.00 | \$0.00 | \$0.00 | \$0.00 | \$248.00 | \$0.00 | \$0.00 | \$0.00 |
| Bed Maintenance | 10.38% | 6.90 | 6.92 | \$1,305.54 | \$110.75 | \$24.72 | \$0.00 | \$1,170.07 | \$16.01 | \$19.59 | \$188.75 |
| Commercial Maintenance | 0.00% | 0.00 | 0.00 | \$98.88 | \$0.00 | \$0.00 | \$0.00 | \$98.88 | \$0.00 | \$0.00 | \$0.00 |
| Early Spring Application | 0.00% | 0.00 | 0.00 | \$56.00 | \$0.00 | \$0.00 | \$0.00 | \$56.00 | \$0.00 | \$0.00 | \$0.00 |
| Early Winter Application | 0.00% | 0.00 | 0.00 | \$300.00 | \$0.00 | \$0.00 | \$0.00 | \$300.00 | \$0.00 | \$0.00 | \$0.00 |
| Edging | 0.00% | 0.00 | 0.00 | \$44.00 | \$0.00 | \$0.00 | \$0.00 | \$44.00 | \$0.00 | \$0.00 | \$0.00 |
| Fall Application | 0.00% | 0.00 | 0.00 | \$300.00 | \$0.00 | \$0.00 | \$0.00 | \$300.00 | \$0.00 | \$0.00 | \$0.00 |
| Fall Clean Up | 1.02% | 4.50 | 0.12 | \$230.00 | \$2.34 | \$0.00 | \$0.00 | \$227.66 | \$20.09 | \$20.09 | \$1,971.47 |
| Flower Bed Weed Control | 90.91% | 0.00 | 0.00 | \$55.00 | \$0.00 | \$50.00 | \$0.00 | \$5.00 | \$0.00 | \$0.00 | \$0.00 |
| Flower Installation | 76.61% | 9.00 | 13.00 | \$1,300.00 | \$240.64 | \$908.50 | \$0.00 | \$350.86 | \$16.04 | \$76.61 | \$100.00 |
| Grubbing | 0.00% | 0.00 | 0.00 | \$15.00 | \$0.00 | \$0.00 | \$0.00 | \$15.00 | \$0.00 | \$0.00 | \$0.00 |
| Landscape Maintenance | 0.00% | 0.00 | 0.00 | \$1,000.00 | \$0.00 | \$0.00 | \$0.00 | \$1,000.00 | \$0.00 | \$0.00 | \$0.00 |
| Lawn Care Maintenance | 2.54% | 1.20 | 2.47 | \$2,120.00 | \$41.74 | \$12.36 | \$0.00 | \$2,075.90 | \$16.92 | \$21.93 | \$862.70 |
| Lawn Mowing | 11.87% | 3.22 | 30.05 | \$3,204.32 | \$149.40 | \$247.52 | \$0.00 | \$2,957.40 | \$14.87 | \$39.49 | \$323.74 |
| Leaf Cleanup | 3.62% | 2.00 | 0.00 | \$320.00 | \$0.00 | \$1.09 | \$0.00 | \$320.91 | \$0.00 | \$0.00 | \$0.00 |
| Monthly Maintenance Agreement | 0.00% | 0.00 | 0.00 | \$0.00 | \$0.00 | \$15.00 | \$0.00 | (\$15.00) | \$0.00 | \$0.00 | \$0.00 |
| Poop Scoop (2/week) | 0.00% | 0.00 | 0.00 | \$68.95 | \$0.00 | \$0.00 | \$0.00 | \$68.95 | \$0.00 | \$0.00 | \$0.00 |
| Poop Scoop (3/week) | 1.45% | 0.00 | 0.33 | \$475.50 | \$6.91 | \$0.00 | \$0.00 | \$468.59 | \$20.74 | \$20.74 | \$1,426.50 |
| System Check | 11.30% | 0.00 | 0.00 | \$100.00 | \$0.00 | \$11.50 | \$0.00 | \$88.50 | \$0.00 | \$0.00 | \$0.00 |
| Totals | 209.80% | 28.82 | 34.88 | \$11,316.19 | \$351.76 | \$1,270.69 | \$0.00 | \$9,493.72 | \$104.67 | \$198.45 | \$4,883.28 |

Cost This number tells you how much you make per \$ sold for this service. For example, if your cost of revenue for a particular service (the Cost) is 72%, that means you make 28 cents per \$ of work performed. This is before recovering indirect costs, overhead, earning profit, etc.

B. Hrs Budgeted Hours (estimated amount of time to perform the job and/or amount of time sold that was used to calculate the rate)

A. Hrs Actual Hours (the actual hours incurred performing the job)

Gross Sales Gross revenue generated for this service for the specified date range. Based on Invoiced Jobs.

Description

This report includes a number of calculations and has reference information for most columns at the bottom of the report.

- Name** the Service name. This report is categorized by Service name regardless of the number of times the service was completed within the specified date range.
- Cost** the percentage of revenue for a particular Service that accounts for labor costs (before indirect costs, overhead, etc.). If the cost is 10% then 90% of your revenue is profit (90 cents on the dollar).
- B. Hrs** the total amount of time a job is anticipated to take regardless of the number of Resources that will be working the job.
- A. Hrs** the hours incurred while performing the job.
- Gross Sales** the gross revenue generated for the Service for the specified date range. This is based on the invoiced amount for the Service (excluding Products).
- Labor Cost** Estimated cost of labor, based on the employee’s Hourly Rate on the **Employee Settings** screen. If the Burden is included on that screen, then

burden is included on the estimate. Otherwise, the burden is not included. Overtime is not considered. This number is an estimate, as not all labor costs can be tracked in SA.

- Materials** the cost of Products attached to the Visit. This number is based off of the "Cost Per" field on the Product level and the amount of Product Invoiced for the Service.
- Direct Cost** Expenses that are billed to the job. These are usually only used for things like equipment rental or subcontractors.
- Gross Profit** Gross Sales minus Labor Cost and Materials.
- C/M. Hr** the cost per man hour. The cost to perform one staff hour of work for this Service, excluding materials. This number is based on the Cost versus Actual Hours.
- C/M.Hr.M** the cost per man hour including materials. The cost of perform one staff hour of work for this Service, including material costs. This number is based on the Cost, Actual Hours, and Materials columns.
- A.\$/M.Hr** actual dollars per man hour. The gross revenue earned per staff hour of performed work.

Job Cost Summary

The visit's revenue versus costs to indicate how profitable each service was.

| Client Name | Client Address | Date | Service | Actual Rev Total | Bgt / Man Hr | Actual Rev / Man Hr | Actual Time Variance | Target Over (Under) | Products Actual Cost | Labor Cost | Drive Effect Cost |
|------------------|---------------------------------------|------------|-----------------------|------------------|--------------|---------------------|----------------------|---------------------|----------------------|------------|-------------------|
| 1234 Golden Lane | 1234 Golden Lane Irving, TX 75062 | 2/26/2020 | Bed Maintenance | \$500.00 | \$0.00 | \$0.00 | 0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| 2324 Felicia Dr | 2324 Felicia Dr Plano, TX 75074 | 11/25/2019 | Snow Plow | \$80.00 | \$266.67 | \$0.00 | 0.30 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| A.J. Green | 22 Eisenhower Drive Frisco, TX 4055 | 9/14/2018 | Fall Clean Up | \$230.00 | \$51.11 | \$0.00 | 4.50 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| A.J. Green | 22 Eisenhower Drive Frisco, TX 4055 | 9/14/2018 | Grubbing | \$13.00 | \$0.00 | \$0.00 | 0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| A.J. Green | 22 Eisenhower Drive Frisco, TX 4055 | 9/20/2018 | Bed Maintenance | \$0.00 | \$0.00 | \$0.00 | 0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| A.J. Green | 22 Eisenhower Drive Frisco, TX 4055 | 9/3/2019 | Lawn Mowing | \$32.00 | \$0.00 | \$0.00 | 0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| A.J. Green | 22 Eisenhower Drive Frisco, TX 4055 | 9/11/2019 | Lawn Mowing | \$32.00 | \$0.00 | \$0.00 | 0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Aaron Rodgers | 3409 Singletree Trail Plano, TX 75023 | 11/25/2019 | Snow Plow | \$40.00 | \$200.00 | \$0.00 | 0.30 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Adam Thielen | 3321 Cross Bend Rd Plano, TX 75023 | 11/25/2019 | Snow Plow | \$40.00 | \$300.00 | \$0.00 | 0.20 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Adamsom, Adam | 8325 Glen Regal Dr Dallas, TX 75243 | 8/6/2018 | Lawn Mowing | \$0.00 | \$0.00 | \$0.00 | 0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Adamsom, Adam | 8325 Glen Regal Dr Dallas, TX 75243 | 11/1/2018 | Lawn Care Maintenance | \$90.00 | \$0.00 | \$0.00 | 0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Alex Collins | 3924 Mission Ridge Rd Plano, TX 75023 | 9/24/2018 | Bed Maintenance | \$90.20 | \$10.00 | \$10.00 | -3.02 | \$10.00 | \$0.00 | \$0.00 | \$0.00 |
| Alex Collins | 3924 Mission Ridge Rd Plano, TX 75023 | 10/4/2018 | Bed Maintenance | \$0.01 | \$0.00 | \$0.00 | 0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Alex Collins | 3924 Mission Ridge Rd Plano, TX 75023 | 9/5/2019 | Lawn Mowing | \$28.00 | \$0.00 | \$0.00 | 0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Alex Collins | 3924 Mission Ridge Rd Plano, TX 75023 | 11/25/2019 | Snow Plow | \$45.00 | \$194.97 | \$0.00 | 0.33 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Alex Collins | 3924 Mission Ridge Rd Plano, TX 75023 | 3/12/2020 | Lawn Mowing | \$44.00 | \$0.00 | \$0.00 | 0.00 | \$0.00 | \$12.54 | \$0.00 | \$0.00 |
| Alli LeDar | 19 Letitia Lane S, Garland, TX 4077 | 9/24/2019 | Bed Maintenance | \$0.00 | \$0.00 | \$0.00 | -0.02 | \$0.00 | \$0.00 | \$0.33 | \$0.00 |

Description

This report shows revenue versus costs to see how profitable each service provided was.

While not as detailed as the Job Costing Report, this report still provides useful information about budgeted versus actual costs at a glance. Many of the columns are calculated in the same way as the Job Costing report:

Actual Rev Total the invoiced rate for both the Service and any Products attached to the Service.

Bgt/Man Hr the rate entered on the job level divided by the budgeted hours.

Actual Rev/Man Hr the invoiced rate for the service divided by the actual time spent on the job. This column will also have red and green arrows. These arrows indicate whether or not the Service was profitable.

Actual Time Variance the difference between budgeted and actual hours.

Target Over (Under) the difference between the actual dollars per man hour earned and the target dollars per man hour desired (entered on the Service level).

Products Actual Cost the actual cost of the Products used on the Service (as opposed to what was initially assigned to the job).

Labor Cost the average cost per Resource times the number of Resources on the job.

Drive Effect Cost the labor costs accrued during drive time.

Job Costing Report

A report that lists the material and labor costs of each Visit. Your job cost settings must be complete for the report to be accurate. Because this report requires specific details in the setup, we recommend you contact SA to schedule a one-on-one with a trainer to plan for job costing.

The Job Costing report is based on three main areas:

- Visit time labor
- Drive time labor
- Product cost (if applicable)

The Job Costing Report is one of the most detailed pre-built reports in the Report Center. So if setup is not done completely, it can result in inaccurate data for one or more columns.

| Client | Email | Address 1 | Address 2 | Map Code | City | State | Postal Code | Date | Resource(s) | Service | Bgt Hrs | Bgt Rate | Bgt/Man Hr | Actual Start | Actual Stop | # of Men | Actual Hrs | Actual Time Variance | Actual Rev Rate | Actual Rev Product | Actual Rev Total | Direct Cost | Actual Rev Costs | Actual Rev Gross Margin |
|------------------|--------------------------------------|-----------------------|-----------|----------|--------|-------|-------------|------------|-------------|-----------------|---------|----------|------------|--------------|-------------|----------|------------|----------------------|-----------------|--------------------|------------------|-------------|------------------|-------------------------|
| 1234 Golden Lane | | 1234 Golden Lane | | | Irving | TX | 75062 | 2/26/2020 | | Bed Maintenance | 0.0000 | \$0.00 | \$0.00 | | | 0 | 0.0000 | 0.0000 | \$500.00 | \$0.00 | \$500.00 | \$0.00 | \$0.00 | \$500.00 |
| 2324 Felicia Dr | | 2324 Felicia Dr | | | Plano | TX | 75074 | 11/23/2019 | LauraP | Snow Plow | 0.3000 | \$80.00 | \$266.67 | | | 1 | 0.0000 | 0.3000 | \$80.00 | \$0.00 | \$80.00 | \$0.00 | \$0.00 | \$80.00 |
| A.J. Green | rayne.paalowski@serviceautopilot.com | 22 Elashower Drive | | | Frisco | TX | 4055 | 9/14/2018 | Kathryn | Gratuity | 0.0000 | \$15.00 | \$0.00 | | | 1 | 0.0000 | 0.0000 | \$15.00 | \$0.00 | \$15.00 | \$0.00 | \$0.00 | \$15.00 |
| A.J. Green | rayne.paalowski@serviceautopilot.com | 22 Elashower Drive | | | Frisco | TX | 4055 | 9/14/2018 | Kathryn | Fall Clean Up | 4.5000 | \$230.00 | \$51.11 | | | 1 | 0.0000 | 4.5000 | \$230.00 | \$0.00 | \$230.00 | \$0.00 | \$0.00 | \$230.00 |
| A.J. Green | rayne.paalowski@serviceautopilot.com | 22 Elashower Drive | | | Frisco | TX | 4055 | 9/20/2018 | LauraP | Bed Maintenance | 0.0000 | \$0.00 | \$0.00 | | | 1 | 0.0000 | 0.0000 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| A.J. Green | rayne.paalowski@serviceautopilot.com | 22 Elashower Drive | | | Frisco | TX | 4055 | 9/5/2019 | MarkG | Lawn Mowing | 0.0000 | \$0.00 | \$0.00 | | | 1 | 0.0000 | 0.0000 | \$32.00 | \$0.00 | \$32.00 | \$0.00 | \$0.00 | \$32.00 |
| A.J. Green | rayne.paalowski@serviceautopilot.com | 22 Elashower Drive | | | Frisco | TX | 4055 | 9/11/2019 | Mow Crew 1 | Lawn Mowing | 0.0000 | \$0.00 | \$0.00 | | | 1 | 0.0000 | 0.0000 | \$32.00 | \$0.00 | \$32.00 | \$0.00 | \$0.00 | \$32.00 |
| Aaron Rodgers | lv42259@comcast.net | 3409 Singletree Trail | | | Plano | TX | 75023 | 11/23/2019 | LauraP | Snow Plow | 0.3000 | \$60.00 | \$300.00 | 02:44 PM | 02:44 PM | 1 | 0.0000 | 0.3000 | \$60.00 | \$0.00 | \$60.00 | \$0.00 | \$0.00 | \$60.00 |
| Adam Thielen | laura.paalowski@serviceautopilot.com | 3321 Cross Bend Rd | | | Plano | TX | 75023 | 11/23/2019 | LauraP | Snow Plow | 0.2000 | \$60.00 | \$300.00 | | | 1 | 0.0000 | 0.2000 | \$60.00 | \$0.00 | \$60.00 | \$0.00 | \$0.00 | \$60.00 |
| Adam Thielen | ten@example.com | 8225 Glen Regal Dr | | | Dallas | TX | 75243 | 8/6/2018 | Joe | Lawn Mowing | 0.0000 | \$0.00 | \$0.00 | 12:00 AM | 12:00 AM | 1 | 0.0000 | 0.0000 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |

Description

The columns in this report extend much further to the right than pictured in this screenshot. Below, you will find explanations for some of these columns as well as calculation information, where applicable. For Pro and Pro Plus Members, the data listed below is also used in the Job Cost data set for a Custom Analysis.

Bgt Hrs the budgeted hours entered for the Visit. Budgeted hours is the amount of time you expect the job to take regardless of the number of Resources working the job.

Bgt Rate the rate applied to the Visit

Bgt/Man Hr budgeted dollars per man hour. **Bgt rate** divided by **Bgt Hrs**.

| | |
|----------------------------------|--|
| Actual Start/Stop time | the start and stop times that were clocked on the Visit (via a mobile app or manually recorded on the Dispatch Board). |
| Actual Hrs | total time spent on a Visit in decimal form (for multiple Resources: the total time worked multiplied by the number of Resources and divided by 60). |
| Actual Time Variance | the difference between Bgt Hrs and Actual Hrs . A positive number indicated the job was finished in less than the B. Hrs, a negative number that it took longer than the B. Hrs. |
| Actual Rev Rate | the rate invoiced for the Service. |
| Actual Rev Product | the rate invoiced for the Product added to the Service. |
| Actual Rev Total | the combined invoiced rates of the Service and Products (Actual Rev Rate plus Actual Rev Product). |
| Direct Cost | the sum of Expense line items associated to the Visit |
| Actual Rev Costs | the total of all related costs for the Visit |
| Actual Rev Gross Margin | Actual Rev Total minus Actual Rev Costs . |
| Actual Rev/Man Hr | Actual Rev Rate divided by Actual Hrs . |
| Target/Man Hr | targeted dollars per man hour; the target hourly rate you want to earn in order to be profitable on a Service. This number is pulled from the information entered on the Service level (Settings > Services > Edit > Job Costing Tab). |
| Target Over (Under) | the difference, either over or under, when Actual Rev/Man Hr is subtracted from the Target/Man Hr . |
| Drive Effect Hrs | the total time spent in drive time between Visits in decimals. |
| Drive Effect Cost | labor costs accrued during Drive Effect Hrs . This is based on the information on the "Payroll/Job Costing" tab and section of the edit overlay for each Resource. |
| Drive Effect % of Rev | how much of the total revenue does this cost make up. Drive Effect Cost divided by Actual Rev Rate . |
| Drive Effect Gross Margin | Actual Rev/Man Hr minus Drive Effect Cost . |
| Drive Effect/Man Hr | drive effect dollars per man hour. Drive Effect Cost divided by Drive Effect Hrs . |
| Target with Drive/Man Hr | the target amount you want to earn on a Service to be profitable when accounting for drive time and cost. This number is formulated based on the |

| | |
|---------------------------------------|---|
| | information on the "Job Costing" tab of the Service (Settings > Service > Edit > Job Costing/Analysis). |
| Target with Drive Over (Under) | difference between Actual Rev/Man Hr and Target/Man Hr with Drive Effect Cost . |
| Labor Cost Avg Cost/Man | Labor Cost divided by the number of Resources who clocked time on the job. |
| Labor Cost | average cost per Resource multiplied by number of Resources on the job. |
| Labor Cost % of Rev | percentage of the total revenue that the Labor Cost makes up. Labor Cost divided by Actual Rev Rate . |
| Labor Cost Gross Margin | Labor Cost minus the Actual Rev Rate . |
| Products Bgt Cost | the total budgeted cost of the Products associated to the Service. This number is entered on the Product level. |
| Products Actual Cost | the actual cost of the Products used on the Service. |
| Products % of Rev | the percentage of total revenue the Products revenue accounts for. |
| Products Gross Margin | Actual Rev Product minus Product Actual Cost . |

Job Hours Reports

Job Hours Summary Report

A list of employees and their actual working versus total hours for any defined time frame. You can filter by date range.

| Resource Name | Resource Type | Applied Hours | Unapplied Hours | Total Hours |
|---------------|---------------|---------------|-----------------|-------------|
| Gordon, Katie | Employee | 5:06 | -3:40 | 1:26 |
| Palmer, Elle | Employee | 5:47 | 8:15 | 14:02 |
| Rivera, Aja | Employee | 5:46 | -3:44 | 2:02 |
| Velour, Sasha | Employee | 5:06 | -3:40 | 1:26 |

(Applied Hours) The total time clocked for all jobs within the specified date range in hours and minutes.

(Unapplied Hours) The difference in time between Total Hours and Applied Hours for the specified date range in hours and minutes.

(Total Hours) The total time of all clock ins/clock outs for the specified date range in hours and minutes.

Description

The report is divided into columns for Resource Name, Resource Type (Employee or Vendor), Applied Hours, Unapplied Hours, and Total Hours. Here is the breakdown of hours. This information is also at the bottom of the report, for reference:

Applied Hours the total time clocked for all jobs within the specified date range in hours and minutes

Unapplied Hours the difference in time between **Total Hours** and **Applied Hours** for the specified date range in hours and minutes

Total Hours the total time of all clock ins/clock outs for the specified date range in hours and minutes

Resource Time Utilization Report

This report shows a breakdown of what an individual employee spent their work hours on. It divides the total time an employee worked over a time period. You can filter by day, week, month, quarter, or year and by a single or multiple Resources

SA Report

Resource Time Utilization

Filter By
 Start Date: 8/1/2019 End Date: 8/24/2020 Period: Week Resource: 15 selected

Refresh Print Export to Excel

| | 2019-33 | | | 2019-46 | | | 2019-49 | | | 2020-09 | | | 2020-13 | | | 2020-14 | | | 2020-20 | | |
|------------------------------|--------------|--------|---------|--------------|--------|--------|--------------|--------|--------|--------------|---------|--------|--------------|---------|--------|--------------|--------|--------|-------------|--------|--------|
| | Time | % | Cost | Time | % | Cost | Time | % | Cost | Time | % | Cost | Time | % | Cost | Time | % | Cost | Time | % | Cost |
| Break | | | | 0 hrs 4 min | 8.33% | | 0 hrs 2 min | 2.53% | | | | | 0 hrs 10 min | 42.42% | | 0 hrs 2 min | 50.00% | | | | |
| Drive | | | | 0 hrs 44 min | 91.67% | \$7.60 | 1 hrs 17 min | 97.47% | \$6.22 | 0 hrs 16 min | 100.00% | \$5.53 | 1 hrs 24 min | 100.00% | \$7.26 | 0 hrs 12 min | 54.55% | \$2.07 | 0 hrs 2 min | 50.00% | \$0.35 |
| Load | 0 hrs 30 min | 9.09% | \$5.53 | | | | | | | | | | | | | | | | | | |
| Included Trimming and Edging | 5 hrs 0 min | 90.91% | \$55.50 | | | | | | | | | | | | | | | | | | |

Description

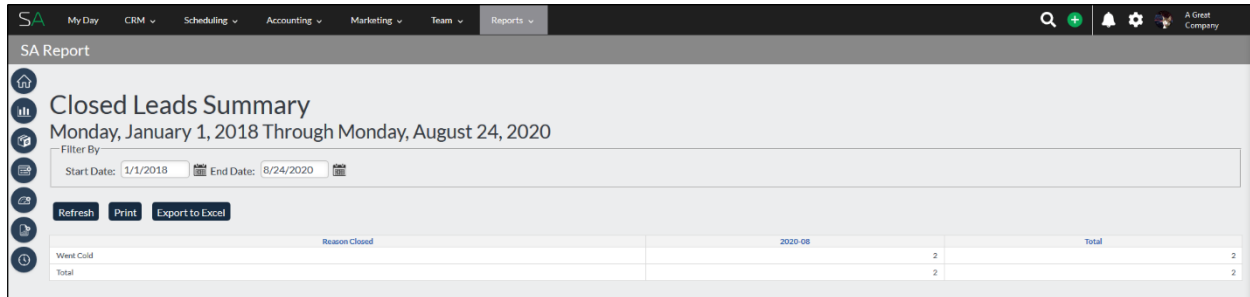
The rows of the report are divided into different types of time, such as breaks, drive time, and time spent on Services.

- Each time period is further divided into the amount of time spent, the percentage of time spent, and the cost for the time.
- Cost is calculated based on the Job Costing information on the Employee account (Edit > Payroll/Job Costing).

Lead Reports

Closed Leads Summary Report

This report shows why a lead was closed and the total number of lead closures within a date range.



SA Report

Closed Leads Summary

Monday, January 1, 2018 Through Monday, August 24, 2020

Filter By

Start Date: 1/1/2018 End Date: 8/24/2020

Refresh Print Export to Excel

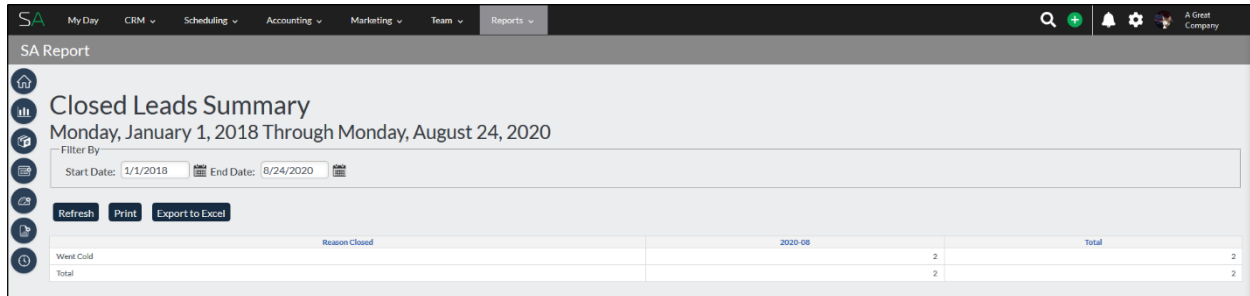
| | Reason Closed | 2020-08 | Total |
|-----------|---------------|---------|-------|
| Went Cold | | 2 | 2 |
| Total | | 2 | 2 |

Description

The columns show the number of leads closed by date range and by Reason Closed. Cancellation Reasons can be customized at **Settings > Cancellation Reasons**. You can also view the total cancellations for a month, regardless of the reason, at the bottom of the table.

Company Scorecard Report

This report shows the number of leads, converted leads, terminated clients, client total, and lead total for each month. Directly created clients are considered created or converted leads.



| Reason Closed | | 2020-08 | Total |
|---------------|--|---------|-------|
| Were Cold | | 2 | 2 |
| Total | | 2 | 2 |

The columns in this report display the month and each category of leads and clients.

Description

| | |
|---------------------|--|
| New Leads | Number of new leads for the month |
| Converted | Number of converted leads for the month |
| Terminated | Number of terminated leads for the month |
| Client Total | Total number of clients |
| Lead Total | Total leads for the month |

Lead Aging Summary Report

This report shows the leads not converted from 0-120+ days, and a timeline of leads who have not converted. Leads entered on the same day will not appear in range 0-30, but they are included in the **Total** column on the right.

| Lead Source | 0-30 Days | 31-60 Days | 61-90 Days | 91-120 Days | 120+ Days | Total |
|----------------|-----------|------------|------------|-------------|-----------|------------|
| Unknown | 0 | 0 | 0 | 4 | 89 | 93 |
| Angie's List | 0 | 0 | 0 | 0 | 1 | 1 |
| Door Hanger | 0 | 0 | 0 | 0 | 6 | 6 |
| Google Adwords | 0 | 0 | 0 | 0 | 2 | 2 |
| Other | 0 | 0 | 0 | 0 | 1 | 1 |
| Total | 0 | 0 | 0 | 4 | 99 | 103 |

Description

The table shows the source of the lead, the various time frames, and a total at the far right. The numbers within each time frame are generated based on the **Client/Lead Since Date**.

Lead Source The lead source from **Settings > CRM > Client Source**

Day Range Number of leads by source type within day range (based pm the **Client Since Date**)

Total The total at the bottom left is the total number of leads, regardless of source type, within the date range

Total The **Total** column at the far right is the total number of leads by source type (from 0 to 120+ days)

New Leads Report

This report lists new, converted, and terminated leads or clients and their information within a specific time frame. Directly created clients are considered as created or converted leads.

SA Report
New Leads from 8/6/2018 to 8/31/2020

Filter By
 Start Date: 8/6/2018 End Date: 8/31/2020 Sales Rep: [Dropdown]

Refresh Print Export to Excel

Page 1 of 2

| Client Name | Address | City | State | Postal Code | Source | Sales Rep | Lead Acquired Date | Client Since |
|--------------------|-----------------------|------------------|-------|-------------|----------------|-----------|--------------------|--------------|
| | 4029 Artist Dr | Plano | TX | 75023 | | | 8/13/2018 | |
| | 4025 Artist Dr | Plano | TX | 75023 | | | 8/13/2018 | |
| | 5927 Mission Ridge Rd | Plano | TX | 75023 | | | 8/13/2018 | |
| | 3216 Fredmar Ln | Plano | TX | 75023 | | | 8/13/2018 | |
| | 3941 Wyeth Dr | Plano | TX | 75023 | | | 8/13/2018 | |
| | 3305 Fredmar Ln | Plano | TX | 75023 | | | 8/13/2018 | |
| | 3504 Fredmar Ln | Plano | TX | 75023 | | | 8/13/2018 | |
| | 3221 Fredmar Ln | Plano | TX | 75023 | | | 8/13/2018 | |
| | 3508 Fredmar Ln | Plano | TX | 75023 | | | 8/13/2018 | |
| | 3513 Fredmar Ln | Plano | TX | 75023 | | | 8/13/2018 | |
| | 3503 Fredmar Ln | Plano | TX | 75023 | | | 8/13/2018 | |
| | 3517 Fredmar Ln | Plano | TX | 75023 | | | 8/13/2018 | |
| | 3512 Fredmar Ln | Plano | TX | 75023 | | | 8/13/2018 | |
| | 3509 Fredmar Ln | Plano | TX | 75023 | | | 8/13/2018 | |
| Collins, Alex | 407 Highland Ave | Highland Village | TX | 75077 | Google Adwords | | | 8/27/2019 |
| Cottonwood Park | 1501 W Bark Lane Rd | Richardson | TX | 75080 | | | | 9/13/2019 |
| Doone, Lorna | 6584 Aylworth Drive | Frisco | TX | 75055 | | | | 5/4/2020 |
| Emerson, Ralph | 701 Nottingham Dr | Richardson | TX | 75080 | | | | 3/13/2019 |
| Jennifer Homeowner | 1201 Richardson Dr | Richardson | TX | 75080 | | | | 1/9/2019 |
| John | 3308 Fredmar Ln | Plano | TX | 75023 | | | 5/4/2020 | |
| Kooboo, Bobbo | 425 Mainline Ave S | Saint Paul | MN | 55105 | | | | 10/15/2018 |
| Rodgers, Aaron | 155 Main Street | Dallas | TX | 75231 | | | | 7/19/2019 |
| SAS Client 1 | 1627 W 3rd St | Irving | TX | 75060 | | | | 10/24/2018 |
| SAS Client 2 | 1524 John Smith Dr | Irving | TX | 75061 | | | | 10/24/2018 |

Description

This report shows basic client/lead information as well as the source of the Account, the Sales Rep who sold the Account, the date the Account was acquired as a lead, and the date the lead was converted to a client.

- Source** Client source of the account from **Settings > CRM > Client Source**
- Sales Rep** Sales Representative for the lead.
- Lead Acquired Date** Date the Account was acquired as a lead.
- Client Since** Date the lead was converted to a client.

Sales Summary by Source Report

This report shows what conversion percentage, from lead to client, each marketing source has. It can be filtered by date range.

SA Report

Sales Summary by Source
Wednesday, January 1, 2020 Through Monday, August 3, 2020

Filter By:
Start Date: 1/1/2020 End Date: 6/3/2020

Refresh Print Export to Excel

| Sales | 2020-04 | 2020-03 | Total |
|----------------------|---------|---------|--|
| # of New Leads | 1 | 2 | 3 |
| # of Leads Converted | 1 | 1 | 2 |
| Conversion Rate | 100.00% | 50.00% | 66.67% |
| New Open Leads | 0 | 1 | 1 |
| Total Open Leads* | 32 | 33 | * Includes the leads closed in the month |

Sales By Lead Source
(# New Leads / # Leads Converted / Conversion %)

| Source Name | 2020-04 | 2020-03 | Total |
|-------------|-----------------|----------------|----------------|
| Unknown | 1 / 1 / 100.00% | 2 / 1 / 50.00% | 3 / 2 / 66.67% |

Description

The report shows the source of sales, the month they were acquired, and the total sales by source for the time frame.

Source Sales source

Total Total sales by source within a defined time frame

Receivables Reports

A/R Aging Report

This report shows unpaid invoices for the current period and for the last 30, 60 and 90+ days, so you can see how long they've been open (outstanding). The date filter changes how the current open invoices appear on the report and is not a snapshot as of the actual date.

Click any client in the report to see a list of the client's past due invoices.

| Client Name | Client Address | Current | 1-30 | 31-60 | 61-90 | >90 | Total | Sales Rep |
|---------------------|--|---------|----------|----------|----------|-------------|-------------|-----------|
| 1303 Starbuck Dr | 1303 Starbuck Dr Richardson, TX 75080 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$108.23 | \$108.23 | |
| 1234 Golden Lane | 1234 Golden Lane Irving, TX 75062 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$241.23 | \$241.23 | |
| 2324 Felicia Dr | 2324 Felicia Dr Frisco, TX 75074 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$56.60 | \$56.60 | |
| A.J. Green | 22 Eisenhower Drive Frisco, TX 4053 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$263.98 | \$263.98 | |
| Aaron Rodgers | 3409 Singletree Trail Plano, TX 75023 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$64.95 | \$64.95 | |
| Adam Thelien | 3321 Cross Bend Rd Plano, TX 75023 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$64.95 | \$64.95 | |
| Adams, Adam | 8223 Glen Regar Dr Dallas, TX 75243 | \$0.00 | \$50.00 | \$50.00 | \$0.00 | \$500.02 | \$600.02 | |
| Alex Collins | 3924 Mission Ridge Rd Plano, TX 75023 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$137.34 | \$137.34 | |
| Alli LeDar | 19 Letitia Lane S. Garland, TX 4077 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$204.59 | \$204.59 | |
| Allen Area | 1413 Cibola Dr Allen, TX 75013 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$123.42 | \$123.42 | |
| Amari Cooper | 42 Casselton Road Richardson, TX 4071 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$1,067.30 | \$1,067.30 | |
| Andrew Luck | 26 Pinewood Lane Rowlett, TX 4040 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$398.36 | \$398.36 | |
| Barnes, Dobby | 1251 E Belt Line Rd Richardson, TX 75081 | \$0.00 | \$108.23 | \$108.23 | \$108.23 | \$2,335.42 | \$2,660.17 | |
| Barter Bill | New Address Allen, TX 75013 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$123.42 | \$123.42 | |
| Ben Roethlisberger | 347 Gore Rd Frisco, TX 4055 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$207.31 | \$207.31 | |
| Beth Iones | 3000 Copper Ridge Dr Plano, TX 75093 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$115.19 | \$115.19 | |
| Big Cheese | 1402 San Saba Ct Allen, TX 75013 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$123.42 | \$123.42 | |
| Bill Custon | 1408 San Saba Ct Allen, TX 75013 Allen, TX 75013 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$123.42 | \$123.42 | |
| Bobby Snacko | 1224 Concho Dr Allen, TX 75013 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$123.42 | \$123.42 | |
| Cam Newton | 172 Richardson Cape Rd Richardson, TX 4071 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$77.94 | \$77.94 | |
| Carlene Adams | 114 Mariana Dr Richardson, TX 75081 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$32.48 | \$32.48 | |
| Charles Clay | 4 Smith Lane Frisco, TX 4053 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$519.64 | \$519.64 | |
| Christian McCaffrey | 1803 Knob Hill Drive Plano, TX 75023 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$123.44 | \$123.44 | |
| Chuck Davis | 1501 Lakewood Rd Garland, TX 4015 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$448.16 | \$448.16 | |
| Cosell, Howard | 200 Rochelle Dr. Irving, TX 75062 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$1,200.00 | \$1,200.00 | |
| Totals | | \$0.00 | \$158.23 | \$158.23 | \$110.75 | \$20,392.61 | \$20,819.86 | |

Description

The date is set according to the billing terms for the client.

- If the billing terms are set to “Net 15,” they will not appear in the past date range until 15 days after the invoice has been open without payment. The invoices will remain in the **Current** column.
- If the billing terms are set to “Due on Receipt,” the invoice automatically appears in the **1 30** column.

Client Name Click any entry in this column to see a list of the client's past due invoices.

Current Current invoice amount (open but not past due)

Day Ranges Past due invoice amount by range of days

Total Total amount of invoices (open and past due)

Sales Rep The Sales Representative for the client

What it's not

This report is not a typical A/R Aging Report by general accounting standards. It is not a “time capsule” report. It shows only your current invoices as they stand today. Setting the date back does not prevent more recent Payments from being taken into account so you can't see what Invoices were open on a specific date in the past, only the Invoices that are open today.

Aging Report Snapshot

This report shows each client’s account balance, the last invoice sent, and the payment received. The filter allows a negative value (positive account balance).

| Client Name | Client Address | Account Balance | Last Invoice Date | Last Invoice Amount | Last Payment Date | Last Payment Amount |
|---------------------|--|-----------------|-------------------|---------------------|-------------------|---------------------|
| 1303 Stratford Dr | 1303 Stratford Dr Richardson, TX 75080 | \$108.25 | 5/31/2018 | \$108.25 | 8/15/2018 | \$660.59 |
| 1234 Golden Lane | 1234 Golden Lane Irving, TX 75062 | \$541.25 | 2/26/2020 | \$541.25 | | |
| 2324 Felicia Dr | 2324 Felicia Dr Plano, TX 75074 | \$86.60 | 11/26/2019 | \$86.60 | | |
| A.J. Green | 22 Eisenhower Drive Frisco, TX 4055 | \$263.98 | 9/18/2019 | \$64.00 | 4/29/2020 | \$64.00 |
| Aaron Rodgers | 3409 Singletree Trail Plano, TX 75023 | \$64.95 | 11/26/2019 | \$64.95 | | |
| Adam Thelen | 5021 Cross Bend Rd Plano, TX 75023 | \$64.95 | 11/26/2019 | \$64.95 | | |
| Adamsion, Adam | 8325 Glen Regal Dr Dallas, TX 75243 | \$540.02 | 7/12/2020 | \$30.00 | 10/22/2019 | \$50.00 |
| Alex Collins | 3924 Mission Ridge Rd Plano, TX 75023 | \$137.34 | 3/31/2020 | \$66.97 | 10/22/2019 | \$28.00 |
| Alli LaDar | 19 Letitia Lane S. Garland, TX 4077 | \$204.59 | 3/26/2020 | \$204.59 | | |
| Allen Area | 1413 Cibola Dr Allen, TX 75013 | \$123.42 | 4/30/2020 | \$41.14 | | |
| Amor Casper | 42 Caswell Road Richardson, TX 4071 | \$1,687.50 | 8/31/2019 | \$541.25 | | \$20.00 |
| Andrew Luck | 26 Pinewood Lane Rowlett, TX 4040 | \$398.36 | 3/31/2020 | \$398.36 | 10/16/2019 | |
| Barnes, Dusty | 1251 E Belt Line Rd Richardson, TX 75081 | \$2,460.17 | 7/31/2020 | \$108.25 | 4/29/2020 | \$94.18 |
| Barter Bill | New Address Allen, TX 75013 | \$123.42 | 4/30/2020 | \$41.14 | | |
| Ben Roethlisberger | 347 Gore Rd Frisco, TX 4035 | \$123.31 | 3/2/2020 | \$36.00 | | |
| Beih Iovoss | 2000 Copper Ridge Dr Plano, TX 75093 | \$115.19 | 11/26/2019 | \$81.19 | | |
| Big Cheese | 1402 San Sabra Ct Allen, TX 75013 | \$123.42 | 4/30/2020 | \$41.14 | | |
| Bill Custom | 1408 San Sabra Ct Allen, TX 75013 | \$123.42 | 4/30/2020 | \$41.14 | | |
| Bobby Senacko | 1224 Concho Dr Allen, TX 75013 | \$123.42 | 4/30/2020 | \$41.14 | | |
| Cam Newton | 172 Richardson Cape Rd Richardson, TX 4071 | \$77.94 | 3/31/2020 | \$77.94 | | |
| Carline Adams | 116 Mariana Dr Richardson, TX 75081 | \$32.48 | 9/30/2019 | \$32.48 | | |
| Charles Clay | 4 Smith Lane Frisco, TX 4055 | \$519.64 | 3/30/2020 | \$97.44 | | |
| Christian McCaffrey | 1805 Knob Hill Drive Plano, TX 75023 | \$122.64 | 11/30/2019 | \$2.04 | | |
| Chuck Davis | 150 Lakeswood Rd Garland, TX 4015 | \$448.16 | 3/31/2020 | \$448.16 | | |
| Coxell, Howard | 200 Rochelle Dr Irving, TX 75062 | \$1,637.13 | 8/31/2019 | \$47.63 | 9/18/2019 | \$47.63 |

Description

- Account Balance** The sum of open balance transactions
- Last Invoice Date** Date on latest invoice
- Last Invoice Amount** Subtotal on the most recent Invoice
- Last Payment Date** Date of last payment
- Last Payment Amount** Amount of last payment

Revenue Reports

Approved Sales by Sales Rep

This report shows the services sold by Sales Rep and how much revenue each sale created. You can sort the Sales Reps based on service name and revenue. On-demand visits are not included.

The screenshot shows the 'SA Report' interface for 'Approved Sales by Sales Rep'. The filter section includes 'Start Date: 8/1/2018', 'End Date: 8/3/2020', and 'Sales Rep:'. There are buttons for 'Refresh', 'Print', and 'Export to Excel'. The table below shows the following data:

| Service Name | Sales Rep | New Revenue | Renewal Revenue |
|--------------------------|-----------|---------------------|-----------------|
| Air Quality Inspection | | \$3,472.00 | |
| Bed Maintenance | | \$1,421.58 | |
| Early Spring Application | | \$56.00 | |
| Edging | | \$44.00 | |
| Fall Application | | \$0.02 | |
| Fall Clean Up | | \$580.00 | |
| Flower Bed Weed Control | | \$9,680.00 | |
| Flower Installation | | \$1,500.00 | |
| Gratuity | | \$15.00 | |
| Landscape Maintenance | | \$19,456.00 | |
| Lawn Care Maintenance | | \$38,114.00 | |
| Lawn Mowing | | \$3,916.32 | |
| Poop Scoop (2/week) | | \$5,127.15 | |
| Poop Scoop (3/week) | | \$16,668.90 | |
| Summer Application | | \$66.00 | |
| Total | | \$100,116.97 | \$0.00 |

For client information, click the service to see the Approved Sales By Sales Rep Detail.

Description

New Revenue New revenue after a visit or service is scheduled (before tax and discounts)

Renewal Revenue Revenue from client renewals

Total Total revenue for new and renewal visits or services

What's Not Included

- Product values
- Tax
- On Demand Visit values
- Client data - You can see client information by clicking the service to see the Approved Sales By Sales Rep Detail.

Any services completed under a contract appear based on their scheduled service rate, not the monthly contract amount.

Daily Production Report

This report shows completed or dispatched services. **Time must be logged on a service** for it to be included on the report. You can filter by date range, resources, and/or Sales Rep. You also have the option to include custom fields in this report.

| Client Name | Client Address | Source | Work Order # | Service | Status | Service Date | Date Completed | Budgeted Hours | Accumulated Hours | Actual Hours | Variance | Budgeted Amount | Actual Amount | Total Cost | Completed in Date Range | Last Payment Date | Resources | Sales Rep |
|--------------|---------------------------------------|--------|--------------|-------------|-----------|--------------|----------------|----------------|-------------------|--------------|----------|-----------------|---------------|------------|-------------------------|-------------------|-----------|----------------------|
| A.J. Green | 22 Eisenhower Drive Frisco, TX 4055 | 232 | | Lawn Mowing | Completed | 9/5/2019 | 9/13/2019 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | \$32.00 | \$32.00 | \$0.00 | Y | 4/29/2020 | MarkG | Mark Gehrer (MarkG) |
| A.J. Green | 22 Eisenhower Drive Frisco, TX 4055 | 232 | | Lawn Mowing | Completed | 9/11/2019 | 9/18/2019 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | \$32.00 | \$32.00 | \$0.00 | Y | 4/29/2020 | MarkG | Mark Gehrer (MarkG) |
| Alex Collins | 3924 Mission Ridge Rd Plano, TX 75023 | 211 | | Lawn Mowing | Completed | 3/12/2020 | 3/26/2020 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | \$28.00 | \$28.00 | \$0.00 | Y | | MarkG | Aja Rivera (Aja) |
| Alex Collins | 3924 Mission Ridge Rd Plano, TX 75023 | 211 | | Lawn Mowing | Completed | 3/12/2020 | 3/26/2020 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | \$28.00 | \$0.00 | \$0.00 | Y | | MarkG | Elle Palmer (LauraP) |
| Alex Collins | 3924 Mission Ridge Rd Plano, TX 75023 | 211 | | Lawn Mowing | Completed | 3/12/2020 | 3/26/2020 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | \$28.00 | \$0.00 | \$0.00 | Y | | MarkG | Katie Gordon (Katie) |
| Alex Collins | 3924 Mission Ridge Rd Plano, TX 75023 | 211 | | Lawn Mowing | Completed | 3/12/2020 | 3/26/2020 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | \$28.00 | \$0.00 | \$0.00 | Y | | MarkG | Mark Gehrer (MarkG) |
| Alex Collins | 3924 Mission Ridge Rd Plano, TX 75023 | 211 | | Lawn Mowing | Completed | 3/12/2020 | 3/26/2020 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | \$28.00 | \$0.00 | \$0.00 | Y | | MarkG | Sasha Velour (Sasha) |

Description

Some of the fields are also defined at the bottom of the report, in case you need a refresher.

Accumulated Hours The sum of clocked hours per Resource for the Job that was not worked within the date range specified. The group accumulated hours per Job is the sum of all clocked hours that was not worked within the date range for all Resources (even if they are not listed).

Actual Hours The sum of clocked hours per Resource for the Job that was worked within the date range specified.

Account for Completion Date This check box changes the algorithm for the **Actual Amount** column as described below.

Actual Amount *If Account for Completion Date is unchecked:*
 Actual amount = ((actual hours + accumulated hours) / budgeted hours) * budgeted amount.

The group actual amount per job = budgeted amount when actual hours + accumulated hours > budgeted hours or when date completed <= end date.
 Actual amount = 0 if budgeted amount = 0 or if actual amount would calculate to a negative number. Otherwise, actual amount = ((actual hours + accumulated hours) / budgeted hours) * budgeted amount.

| | |
|-------------------------------|---|
| Actual Amount (cont'd) | <p><i>If Account for Completion Date is checked and job was completed in the date range:</i> If (budgeted hours group accumulated hours) > 0 then ((budgeted hours group accumulated hours) / budgeted hours) * budgeted amount * (actual hours / group actual hours), otherwise 0.</p> <p><i>If Account for Completion Date is checked and job was not completed in the date range:</i> If group accumulated hours > budgeted hours then 0, otherwise, if (total man hours + group accumulated hours) > budgeted hours, then (budgeted hours group accumulated hours) / budgeted hours * budgeted amount * (actual hours / group actual hours), otherwise (total man hours / budgeted hours) * budgeted amount.</p> |
| Resources | The resource who clocked hours for the job. The group resource per job is the resources for the visit. |
| Total Cost | Sum of labor cost plus expenses for the job. |

Invoice Audit Summary

This report lists invoices, services, and totals in the time range you specify. You can filter by date range for the invoice, and by Sales Rep.

The screenshot shows the 'SA Report' interface for 'Invoice Audit Summary'. The top navigation bar includes 'SA Report' and a 'Reports' dropdown. The sidebar contains icons for home, reports, filters, and a clock. The main content area features a title 'Invoice Audit Summary', a 'Filter By' section with 'Start Date: 7/1/2019', 'End Date: 7/24/2020', and 'Sales Rep:' dropdown, and a 'Don't Group Line Items' checkbox. Below the filters are buttons for 'Refresh', 'Print', 'Export to Excel', and 'Export for Transaction Pro'. A pagination control shows 'Page 1 of 10'. The data table below has the following columns: Client Name, Client Address, Sales Rep, Invoice #, Invoice Date, Line Item Description, Parts and Materials Income, Service Income, Sales Tax, and Invoice Total.

| Client Name | Client Address | Sales Rep | Invoice # | Invoice Date | Line Item Description | Parts and Materials Income | Service Income | Sales Tax | Invoice Total |
|---------------|---------------------|-----------|-----------|--------------|-----------------------|----------------------------|----------------|-----------|---------------|
| Adamson, Adam | 8325 Glen Regal Dr | | 191 | 7/12/2019 | Lawn Care Maintenance | | \$50.00 | | \$50.00 |
| Barnes, Dusty | 1251 E Belt Line Rd | | 192 | 7/31/2019 | Edging | | \$100.00 | \$8.25 | \$108.25 |
| Adamson, Adam | 8325 Glen Regal Dr | | 193 | 8/12/2019 | Lawn Care Maintenance | | \$50.00 | | \$50.00 |

Description

This report breaks down each line of an invoice. Each line is grouped by the account settings for each product or service. However, each line also includes the *same* invoice total. The report ignores these duplicate totals when calculating the total amount at the bottom of the report.

Be aware that if you export the data to a spreadsheet like Excel, and try to perform additional calculations, then the final total in your spreadsheet could be inaccurate.

Daily Payment Audit Summary Report

This report shows the total payments in the time frame you specify, and the method of payment (such as check or Visa).

The screenshot shows the 'SA Report' interface for the 'Daily Payment Audit Summary Report'. The filter section is set to 'Start Date: 7/1/2019' and 'End Date: 7/24/2020'. The table below displays the following data:

| Date | Cash + Checks | MC | Visa | Discover | AMEX | Debit Card | E-Check | Gift Card | Other CC | Other | Unapplied Amount | Service Income | Parts and Materials Income | Unapplied Payments | Sales Tax |
|------------|---------------|----------|----------|----------|---------|------------|---------|-----------|----------|--------|------------------|----------------|----------------------------|--------------------|------------|
| 2/10/2020 | \$0.00 | \$181.69 | \$209.24 | \$0.00 | \$88.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | (\$411.55) | (\$51.00) | (\$10.00) | (\$14.38) |
| 2/10/2020 | \$15.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$10.00 | (\$15.00) | | (\$10.00) | \$0.00 |
| 2/19/2020 | \$133.15 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$866.85 | (\$55.00) | (\$68.00) | (\$864.85) | (\$10.15) |
| 4/29/2020 | \$94.18 | \$0.00 | \$64.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | (\$139.00) | (\$12.00) | | (\$7.18) |
| 8/30/2019 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$65.00 | | | (\$65.00) | \$0.00 |
| 9/18/2019 | \$47.63 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | (\$44.00) | | | (\$3.63) |
| 10/16/2019 | \$16.24 | \$0.00 | \$15.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$48.76 | (\$28.86) | | (\$48.76) | (\$2.38) |
| 10/21/2019 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$60.00 | | | (\$60.00) | \$0.00 |
| 10/22/2019 | \$78.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | (\$78.00) | | | \$0.00 |
| 10/28/2019 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$60.62 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$430.00 | (\$56.00) | | (\$430.00) | (\$4.62) |
| 11/22/2019 | \$1,948.50 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | (\$1,800.00) | | | (\$148.50) |

Description

Separate columns for each method of payment show the total amount of payments.

Date Date of payment

Unapplied Amount Payment that has not yet been applied to an Invoice

Sales Tax The amount of sales tax collected on that date

Revenue by Postal Code

Shows revenue by postal code date, postal (zip) code, and service.

The screenshot displays the 'SA Report' interface for 'Revenue by Postal Code'. The top navigation bar includes 'My Day', 'CRM', 'Scheduling', 'Accounting', 'Marketing', 'Team', and 'Reports'. The sidebar on the left contains icons for Home, Reports, Filter, Print, Export to Excel, and a search icon. The main content area features a 'Filter By' section with 'Start Date' (7/1/2019), 'End Date' (7/24/2020), 'Postal Code' (Select options), and 'Service'. Below the filters are 'Refresh', 'Print', and 'Export to Excel' buttons. A pagination control shows 'Page 1 of 1'. The data table below lists postal codes and their corresponding amounts.

| Postal Code | Amount |
|-------------|------------|
| 08861 | \$181.28 |
| 4015 | \$316.00 |
| 4040 | \$312.00 |
| 4055 | \$2,412.03 |
| 4071 | \$956.00 |
| 4077 | \$165.00 |
| 55105 | \$75.00 |
| 75002 | \$760.00 |
| 75013 | \$1,661.50 |
| 75023 | \$1,597.04 |
| 75062 | \$175.00 |
| 75074 | \$80.00 |
| 75080 | \$608.00 |
| 75081 | \$459.40 |
| 75082 | \$0.00 |
| 75093 | \$109.00 |
| 75230 | \$220.00 |
| 75248 | \$176.00 |
| 76273 | \$176.00 |

Description

The report includes the postal code for the serviced property. The date range is based on when the payment is applied to an invoice. You can select only one service at a time.

Postal Code Service property postal code

Amount Invoice total without sales tax

What it doesn't include: monthly installment plan revenue.

Revenue by Service Summary Report

This report shows what a service has produced historically for quick comparison. You can use different filters to select the unit of time and date range:

Period

- **Yearly** – Only that year
- **Quarterly** – Four columns for a single year (can be expanded if you increase the number of years in the date range)
- **Monthly** – Twelve columns, one for every month
- **Weekly** – 52 columns a year based on the date range settings

Summarize by – can be either by invoice date or visit date.

You can opt to select the check boxes **Include Products** and/or **Include Discounts**.

This report is data-intensive and may slow or stop your web browser as it's processing.

| Service | 2020-01 | 2020-02 | 2020-03 | 2020-04 | 2020-05 | 2020-06 | 2020-07 | Total |
|------------------------------------|-------------------|-------------------|-------------------|-----------------|-----------------|-----------------|----------------|-------------------|
| Bed Maintenance | \$0.01 | \$940.01↑ | \$561.01↓ | \$65.00↓ | \$2.50↓ | | | \$1,568.53 |
| Fall Clean Up | | \$0.00 | | | | | | \$0.00 |
| Flower Bed Weed Control | | \$55.00 | \$0.00↓ | | | | | \$55.00 |
| Flower Installation | | | \$1,500.00 | | | | | \$1,500.00 |
| Lawn Care Maintenance | \$608.00 | \$684.00↑ | | \$646.00 | | | | \$1,938.00 |
| Lawn Mowing | \$876.00 | \$609.28↓ | \$544.00↓ | \$188.00↓ | | | | \$2,217.28 |
| Monthly Maintenance Agreement | | | \$0.00 | | | | | \$0.00 |
| Poop Scoop (3/week) | \$47.70 | \$23.85↓ | \$23.85 | | | | | \$95.40 |
| Contract - Edging | \$100.00 | \$100.00 | \$100.00 | \$100.00 | \$100.00 | \$100.00 | | \$600.00 |
| Contract - Lawn Care Maintenance | | | | | | \$50.00 | \$50.00 | \$100.00 |
| Contract - Snow Contract Agreement | \$200.00 | \$150.00↓ | | | | | | \$350.00 |
| Total | \$1,831.71 | \$2,562.14 | \$2,728.86 | \$999.00 | \$102.50 | \$150.00 | \$50.00 | \$8,424.21 |

Description

This report is designed to be viewed at a glance, so the content is limited. If there are points of comparison within the table, green up arrows or red down arrows will reflect the change in revenue across time.

Service Service name

Total Revenue total by service for all dates

Revenue Per Service/Service Revenue Per Visit Report

This report compares budgeted versus actual hours and amounts on visits in a specific time frame.

| Client Name | Client Address | Service | Status | Date | Budgeted Hours | Actual Hours | Budgeted Amount | Actual Amount | Last Payment Date | Resources | Sales Rep |
|---------------|---|---------------------|------------------|-----------|----------------|--------------|-----------------|---------------|-------------------|-----------|-----------|
| Doug Baldwin | 3520 Ashington Ct Plano, TX 75023 | Lawn Mowing | Pending Dispatch | 7/24/2020 | 0.00 | 0.00 | \$0.00 | \$0.00 | | Aja | |
| Jackson, Jack | 455 Newberry Ave Plano, TX 75062 | Lawn Mowing | Pending Dispatch | 7/24/2020 | 0.00 | 0.00 | \$0.00 | \$0.00 | | Aja | |
| Jasper Jazz | 3533 Santana Ln Plano, TX 75023 | Lawn Mowing | Pending Dispatch | 7/24/2020 | 0.00 | 0.00 | \$0.00 | \$0.00 | | Aja | |
| Jordan Howard | 3328 Melanie Ln Plano, TX 75023 | Lawn Mowing | Pending Dispatch | 7/24/2020 | 0.00 | 0.00 | \$0.00 | \$0.00 | | Aja | |
| O'Hara, Asia | 170 W. Campbell Rd Richardson, TX 75080 | Poop Scoop (2/week) | Pending Dispatch | 7/24/2020 | 0.00 | 0.00 | \$8.95 | \$0.00 | | Aja | |
| Rene Damico | 4001 Crooked Lane Plano, TX 75023 | Lawn Mowing | Pending Dispatch | 7/24/2020 | 0.00 | 0.00 | \$0.00 | \$0.00 | | Aja | |
| Thompson, Bob | 4567 Plano Rd Plano, TX 75080 | Lawn Mowing | Pending Dispatch | 7/24/2020 | 0.00 | 0.00 | \$0.00 | \$0.00 | | Aja | |
| Tyreek Hill | 3720 Campstone Dr Plano, TX 75023 | Lawn Mowing | Pending Dispatch | 7/24/2020 | 0.00 | 0.00 | \$0.00 | \$0.00 | | Aja | |
| Total | | | | | 0.00 | 0.00 | \$8.95 | \$0.00 | | | |

Description

| | |
|--------------------------|---|
| Client Name | the name on the client Account to be serviced |
| Client Address | the address to be serviced |
| Service | the scheduled Service |
| Status | the status of the scheduled service |
| Date | the date the Service is scheduled |
| Budgeted Hours | the budgeted hours on the Job |
| Actual Hours | the actual hours clocked on the job |
| Budgeted Amount | the rate on the job |
| Actual Amount | the sum of clocked hours on the Job divided by the budgeted hours of the Job times the budgeted amount. If the sum of clocked hours on the Job exceeds the budgeted hours on the Job, the actual amount is capped at the budgeted amount. |
| Last Payment Date | the date of the most recent payment |
| Resources | Resource or team assigned to the Job |
| Sales Rep | the Sales Rep assigned to the Job on the "Details" tab of the Job record |

What's Not Included:

Products, discounts, other charges, and reflect invoice revenue.

Sales Activity Detail Report

This report shows services sold by the Sales Rep you specify. Services and products must be scheduled and completed on the Dispatch Board to be reflected on the report.

Use the **Sales Rep** filter to select all or one specific Sales Rep. The date filter is based on when the visits were completed, not necessarily the invoice date or when a payment was accepted.

The screenshot shows the 'SA Report' interface. At the top, there are navigation tabs: My Day, CRM, Scheduling, Accounting, Marketing, Team, and Reports. The main title is 'Sales Activity Detail'. Below the title, there are filter options: 'Filter By' with a 'Sales Rep' dropdown set to 'All', 'Start Date' set to '7/3/2019', and 'End Date' set to '7/24/2020'. There are buttons for 'Refresh', 'Print', and 'Export to Excel'. A pagination control shows 'Page 1 of 9'. The data table below has the following columns: Sales Rep, Total, Client Name, Schedule Date, Service, Service Amt, Product, Product Amt, Amt Tax, Estimate #, InvoiceNumber, Address, City, and Postal Code.

| Sales Rep | Total | Client Name | Schedule Date | Service | Service Amt | Product | Product Amt | Amt Tax | Estimate # | InvoiceNumber | Address | City | Postal Code |
|-----------|--------------------|---------------|---------------|---------------------|--------------------|---------------|-------------------|-----------------|------------|---------------|-----------------------|------------|-------------|
| | \$13,071.47 | | | | \$10,439.25 | | \$1,897.00 | \$734.86 | | | | | |
| | \$268.46 | Andrew Luck | 3/26/2020 | Flower Installation | \$188.00 | Flower Flat A | \$60.00 | \$20.46 | | 399 | 26 Pinewood Lane | Rowlett | 4040 |
| | \$333.41 | Andrew Luck | 3/26/2020 | Flower Installation | \$188.00 | Flower Flat B | \$120.00 | \$25.41 | | 399 | 26 Pinewood Lane | Rowlett | 4040 |
| | \$96.60 | Donald Cohen | 11/25/2019 | Snow Plow | \$90.00 | | \$0.00 | \$6.60 | | 274 | 3340 Sage Brush Trail | Plano | 75023 |
| | \$94.18 | Barnes, Dusty | 3/26/2020 | Bed Maintenance | \$75.00 | Lawn Bags | \$12.00 | \$7.18 | | 397 | 1251 E Belt Line Rd | Richardson | 75081 |
| | \$32.48 | Rene Damico | 12/4/2019 | Poop Scoop (3/week) | \$30.00 | | \$0.00 | \$2.48 | | 287 | 4001 Crooked Lane | Plano | 75023 |
| | \$32.48 | Rene Damico | 9/11/2019 | Poop Scoop (3/week) | \$30.00 | | \$0.00 | \$2.48 | | 220 | 4001 Crooked Lane | Plano | 75023 |

Description

- Sales Rep** Sales Rep listed in the Job settings, not the client settings
- Total** total on the invoice including tax and products (does not include discounts)
- Schedule Date** the date the Visit was completed
- Service** the Service completed
- Service Amt** the Service rate before tax
- Product** Products used
- Product Amt** the rate of the Product before tax
- Amt Tax** the total tax amount
- Estimate #** the Estimate number (if the Job was scheduled from an Estimate)
- Invoice Number** the Invoice number originating from the invoice generated for the service

Services completed under Contract will appear according to their scheduled rate amounts. This report will not display what Discounts are applied to an Invoice or scheduled through the Visit. It will also not show any Service or Product added to a Visit after it was completed.

Note: Services completed under Contract will appear according to their scheduled rate amounts.

What's Not Included

- Service name
- Discounts applied on an invoice or scheduled through the visit
- Product name
- Any service or product added to an invoice after the visit is complete

Sales Activity Summary Report

This report shows services sold by the Sales Rep you specify. Services and products must be scheduled and completed on the Dispatch Board to appear on the report. You can filter by Sales Rep and date range.

| Sales Rep | Total | Client Name | Schedule Date | Service Amt | Product Amt | Amt Tax | Address | City | State | Postal Code |
|-----------|--------------------|----------------|---------------|--------------------|-------------------|-----------------|--------------------|------------|-------|-------------|
| | \$13,071.47 | | | \$10,439.25 | \$1,897.00 | \$734.66 | | | | |
| \$41.14 | | Stefon Diggs | 4/14/2020 | \$38.00 | \$0.00 | \$3.14 | 910 Cypress Dr | Allen | TX | 75002 |
| \$6.66 | | Hart Montague | 12/2/2019 | \$0.00 | \$6.66 | \$0.66 | 2405 Alvarado St | Richardson | TX | 75082 |
| \$126.82 | | Denise Collins | 11/25/2019 | \$104.00 | \$13.00 | \$9.82 | 3353 Birmingham Dr | Plano | TX | 75023 |
| \$41.14 | | Big Cheese | 4/14/2020 | \$38.00 | \$0.00 | \$3.14 | 1402 San Saba Ct | Allen | TX | 75013 |
| \$73.61 | | David Johnson | 11/23/2019 | \$68.00 | \$0.00 | \$5.61 | 3916 Hatherly Dr. | Plano | TX | 75023 |
| \$41.14 | | Sunny | 2/4/2020 | \$38.00 | \$0.00 | \$3.14 | 1406 San Saba Ct | Allen | TX | 75013 |
| \$41.14 | | Will Hensley | 2/4/2020 | \$38.00 | \$0.00 | \$3.14 | 1402 San Saba Ct | Allen | TX | 75013 |
| \$541.25 | | Amari Cooper | 8/19/2019 | \$500.00 | \$0.00 | \$41.25 | 42 Casselton Road | Richardson | TX | 4071 |
| \$41.14 | | Stefon Diggs | 1/28/2020 | \$38.00 | \$0.00 | \$3.14 | 910 Cypress Dr | Allen | TX | 75002 |

Description

| | |
|----------------------|--|
| Sales Rep | the Sales Rep listed in the "Details" tab of the Master Job |
| Total | The full invoiced amount (does not include products or services added to the invoice after it's generated) |
| Client Name | the name of the client who was serviced |
| Schedule Date | the date when the Visit was completed |
| Service Amt | the amount on the Service before Discounts |
| Product Amt | the amount on the Product before Discounts |
| Amt Tax | the total amount taxed on each Service or Product |
| Address | the service address |
| City | the service city |
| State | the service state |
| Postal Code | the service postal (zip) code |

Services completed under Contract will appear according to their scheduled rate amounts.

Note: Services completed under Contract will appear according to their scheduled rate amounts.

What's Not Included: Service name, Product name, Discounts applied on an invoice or scheduled through the visit, any service or product added to an invoice after the visit is complete.

Sales by Date Sold

This report shows services sold by a Sales Rep, grouped by the date sold. Sales are included after the services are completed. The **Start Date/End Date** defaults to when the service was created and can be reviewed in the Job settings.

| Sales Rep | Date Sold | Lawn Mowing | Flower Bed | Weed Control | Bed Maintenance | Flower Installation | Air Quality Inspection | Fall Application | Summer Application | Edging | Poop Scoop (2/week) | Poop Scoop (3/week) | Early Spring Application | Lawn Care Maintenance | Total |
|--------------|------------|-------------|------------|--------------|-----------------|---------------------|------------------------|------------------|--------------------|------------|---------------------|---------------------|--------------------------|-----------------------|-------------|
| | 1/13/2020 | \$1,389.28 | | | | | | | | | | | | | \$1,389.28 |
| | 2/10/2020 | \$120.00 | | | | | | | | | | | | | \$120.00 |
| | 2/29/2020 | | \$9,680.00 | | | | | | | | | | | | \$9,680.00 |
| | 3/12/2020 | | | \$75.00 | | | | | | | | | | | \$75.00 |
| | 3/26/2020 | | | \$495.00 | \$1,300.00 | | | | | | | | | | \$1,995.00 |
| | 4/10/2020 | | | | | \$124.00 | | | | | | | | | \$124.00 |
| | 5/12/2020 | | | | | \$124.00 | | | | | | | | | \$124.00 |
| | 5/14/2020 | | | | | | \$0.02 | | \$66.00 | | | | | | \$66.02 |
| | 8/19/2019 | \$102.00 | | | | | | | | | | | | | \$102.00 |
| | 8/29/2019 | | | \$456.03 | | \$3,224.00 | | | | | | | | | \$3,680.03 |
| | 8/30/2019 | | | | | | | | | \$44.00 | | | | | \$44.00 |
| | 9/5/2019 | \$1,178.04 | | | | | | | | | \$4,080.00 | \$9,180.00 | | | \$14,439.04 |
| | 9/24/2019 | | | \$0.01 | | | | | | | | | | | \$0.01 |
| | 10/14/2019 | | | \$0.01 | | | | | | | | | | | \$0.01 |
| | 10/28/2019 | | | | | | | | | | | | \$56.00 | | \$56.00 |
| | 11/12/2019 | | | | | | | | | | | | | \$38,114.00 | \$38,114.00 |
| | 12/6/2019 | \$871.00 | | | | | | | | | | | | | \$871.00 |
| Total | | \$3,861.32 | \$9,680.00 | \$1,028.05 | \$1,300.00 | \$3,472.00 | \$0.02 | \$66.00 | \$44.00 | \$4,080.00 | \$9,180.00 | \$56.00 | \$38,114.00 | \$71,079.39 | |

The columns on this report will vary slightly depending on the Services you offer. By default, all Services will be included unless the Service filter is applied. You can also include Products whether or not they've been invoiced. Tax is not included in any field.

If completed under a contract, the scheduled service will appear at the scheduled rate, not by the default contract service and set monthly amounts.

Description

Include Products Select this check box to include products on the report. This will **not** generate a column for products. If the visit is not invoiced, the product amounts will not be added unless you select the check box "Include Uninvoiced Products/Discounts."

Include Uninvoiced Products/Discounts Selecting this check box will **not** generate a column for the added products. The amount is included in the service amount after the visit is invoiced.

Sales Rep The Sales Rep is specified in the details of the Job.

Date Sold The date when the service was scheduled. This date can be reviewed in the Job settings and customized.

Note: If completed under a contract, the scheduled service will appear at the scheduled rate, **not** by the default contract service and set monthly amounts.

What's Not Included: Tax

Sales by Date Sold Detail Report

This report shows services sold by each Sales Rep, grouped by the date sold. Sales are included after the services are completed, according to the Date Sold, which is based on when the service was scheduled. This date can be reviewed in the Job settings.

| Client | Sales Rep | Date Sold | Work Order # | Air Quality Inspection | Bed Maintenance | Early Spring Application | Edging | Fall Application | Fall Clean Up | Flower Bed Wood Control | Flower Installation | Holiday Cleanup | Lawn Care Maintenance | Lawn Mowing | Mosquito Control | Peep Scoop (2/weeks) | Peep Scoop (3/weeks) | Summer Application | Total | Alarm Code | Building | Dog | Gate Code | LB Contract End Date | LB Contract Start Date | LB Driveway Length | LB Driveway Sq Ft | LB Gross Sq Ft |
|--------------------|-----------|-----------|--------------|------------------------|-----------------|--------------------------|--------|------------------|---------------|-------------------------|---------------------|-----------------|-----------------------|-------------|------------------|----------------------|----------------------|--------------------|------------|------------|----------|-----|-----------|----------------------|------------------------|--------------------|-------------------|----------------|
| Visage, Michelle | | 1/13/2020 | 286 | | | | | | | | | | | \$181.28 | | | | | \$181.28 | | | | | | | | | |
| Wagner, Bobby | | 1/13/2020 | 287 | | | | | | | | | | | \$264.00 | | | | | \$264.00 | | | | | | | | | |
| Walnut Bend School | | 1/13/2020 | 288 | | | | | | | | | | | \$220.00 | | | | | \$220.00 | | | | | | | | | |
| Walter Maine | | 1/13/2020 | 289 | | | | | | | | | | | \$220.00 | | | | | \$220.00 | | | | | | | | | |
| White, James | | 1/13/2020 | 290 | | | | | | | | | | | \$176.00 | | | | | \$176.00 | | | | | | | | | |
| Will Monthly | | 1/13/2020 | 291 | | | | | | | | | | | \$176.00 | | | | | \$176.00 | | | | | | | | | |
| Winger, John | | 1/13/2020 | 292 | | | | | | | | | | | \$176.00 | | | | | \$176.00 | | | | | | | | | |
| XChange, Monet | | 1/13/2020 | 293 | | | | | | | | | | | \$176.00 | | | | | \$176.00 | | | | | | | | | |
| Ben Rothlisberger | | 2/10/2020 | 297 | | | | | | | | | | | \$72.00 | | | | | \$72.00 | | | | | | | | | |
| Lamar Miller | | 2/10/2020 | 296 | | | | | | | | | | | \$48.00 | | | | | \$48.00 | | | | | | | | | |
| Bert Stevenson | | 2/29/2020 | 302 | | | | | | | | | | | | | | | | \$0.00 | | | | | | | | | |
| Bert Stevenson | | 2/29/2020 | 298 | | | | | | | \$2,420.00 | | | | | | | | | \$2,420.00 | | | | | | | | | |
| Cottonwood Park | | 2/29/2020 | 299 | | | | | | | \$2,420.00 | | | | | | | | | \$2,420.00 | | | | | | | | | |

Description

The columns on this report will vary slightly depending on your Custom Fields and Services offered. All Services and Custom Fields will be selected by default if the filters are not set. You also have the option to include Products if they have not yet been invoiced. This report does not include tax in any field.

Discounts

If you include Discounts in this report, it will not generate an additional column. Rather, the Discount amount will be deducted from the Service rate after the Visit is invoiced. If the Visit is not invoiced, the discount amounts will not be deducted unless you select the check box **Include Uninvoiced Products/Discounts**.

Installment Plan/Contracts

If the service is part of an installment plan, the scheduled Service will appear at the scheduled rate, not by the default contract service and set monthly amounts. If a visit is set to a custom schedule, it multiplies the set rate of the service by the number of days in the schedule. For example, if the custom schedule is set to 8 days, and the set rate is \$25 per service, the report will show \$200.

Service

These are listed according to the date sold date once the services are completed.

| | |
|--|---|
| Custom Field | This report also provides the option for you to select a custom data field for the report. "ALL" is selected by default. |
| Include Products | Select this check box to include a column for products on the report. If the visit is not invoiced, the product amounts will not be added unless you select the check box Include Uninvoiced Products . |
| Include Discounts | Select this check box to include discounts on the report. This will not generate a column for discounts. The discount amount is deducted from the service rate after the visit is invoiced. If the visit is not invoiced, the discount amounts will not be deducted unless you select the check box Include Uninvoiced Products/Discounts . |
| Include Uninvoiced Products/Discounts | Selecting this check box will not generate a column for the added products. The amount is included in the service amount after the visit is invoiced. |
| Work Order # | This is the number assigned to the service in the Job settings. |

What's Not Included: Tax

Schedule List Reports

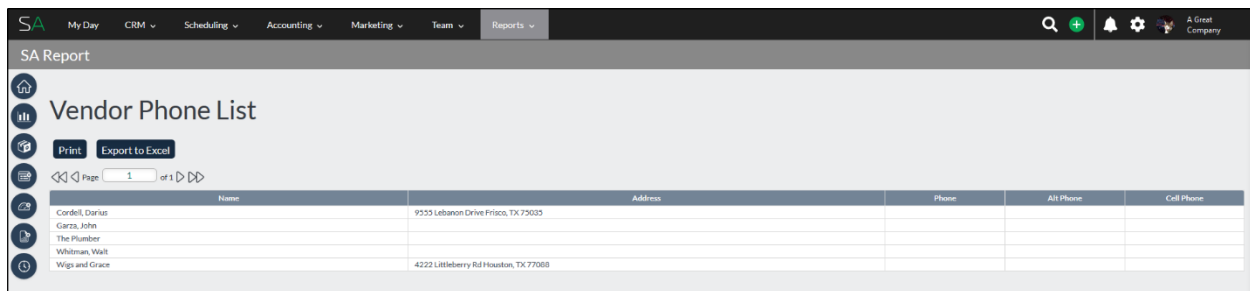
There are three different contact list reports available from the list of SA Reports:

- **Contractor Phone List** is a list of Vendors who are set up as Contractors
- **Employee Directory** is a list of Employees with the option of adding Vendors who are set up as Contractors to the list
- **Vendor Contact List** is a list of Vendors who are not set up as contractors

Contractor Phone List Report

A list of third-party Vendors and their contact information. The Vendors' information for this report can be modified under **Team > Vendors > [vendor name] > Edit > Details/Contact**

It's a simple report with no additional filters.



The screenshot shows the 'Vendor Phone List' report interface. At the top, there is a navigation bar with 'SA Report' and 'Vendor Phone List' tabs. Below the navigation bar, there are icons for home, list, print, and export to Excel. A pagination control shows 'Page 1 of 1'. The main content is a table with the following data:

| Name | Address | Phone | All Phone | Cell Phone |
|-----------------|---------------------------------------|-------|-----------|------------|
| Cordell, Darius | 9255 Lebanon Drive Frisco, TX 75035 | | | |
| Garza, John | | | | |
| The Plumber | | | | |
| Whitman, Walt | | | | |
| Wigs and Grace | 4222 Littleberry Rd Houston, TX 77068 | | | |

Description

Most of the columns on this report are self-explanatory.

Credit Limit This field is on the "Details" tab of the edit overlay for each Vendor.

Employee Directory Report

This report shows employee contact information. Select the **Include Contractors** check box to include Vendors who are marked as contractors on a general list of employee information.

| Name | Type | Role | Address 1 | Address 2 | City | State | Postal Code | Phone # | Alternate Phone # | Email | Emergency Contact | Emergency Contact Phone |
|-----------------|------------|----------------------|---------------------------|-----------|------------|-------|-------------|---------------------|-------------------|---------------------|-------------------|-------------------------|
| Bennett, Tony | Employee | Team Leader | | | | Texas | | | | test@example.com | | |
| Cordell, Darius | Contractor | | 9555 Lebanon Drive | | Frisco | Texas | 75035 | | | | | |
| Coulee, Shea | Employee | | | | | Texas | | | | test@example.com | | |
| Garza, John | Contractor | | | | | | | | | | | |
| Gehrer, Mark | Employee | Customer Support Rep | 1201 Richardson Dr., #200 | | Richardson | | 75080 | | | mgehrer@salogin.com | | |
| Gordon, Katie | Employee | Owner | | | | Texas | | | | kgordon@AGC.com | | |
| Morgan, Joe | Employee | | | | | Texas | | | | | | |
| Palmer, Elle | Employee | Owner | 1201 Richardson Dr., #200 | | Richardson | Texas | 75080 | (97-2)-728-111-1111 | 222-222-2222 | e.palmer@AGC.com | | |
| Rivera, Aja | Employee | Mobile only | | | | Texas | | | | aja@agc.com | | |
| The Plumber | Contractor | | | | | | | | | | | |
| Velour, Sasha | Employee | Team Leader | | | | Texas | | | | svelour@AGC.com | | |
| Whitman, Walt | Contractor | | 4222 Littleberry Rd | | Houston | Texas | 77088 | | | | | |
| Wigs and Grace | Contractor | | | | | | | | | | | |

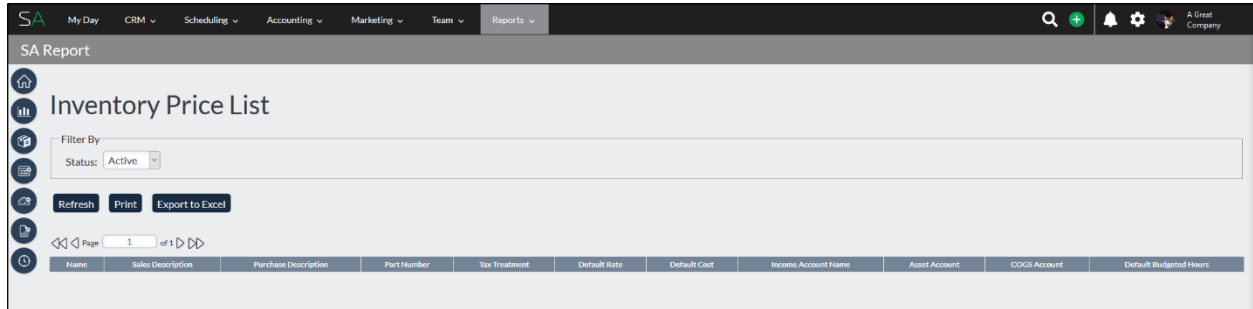
The information on this report is entered on the Edit overlay for an employee or vendor at:

Team > Employees/Vendors > [name] > Edit > Personal Information/Employment

Inventory Product List Report/Inventory Price List Report

This is a list of products and their inventory information (taxability, rate, cost, etc.) for a service.

You can filter by active or inactive status.



Description

Each column on this report represents a field on the Product overlay. This report is different from exporting your Product List because it does not contain all fields.

Product information listed in the report is at: **Settings > Scheduling > Products > Inventory > [product name] > Details**

Non-Inventory Product List/Non-Inventory Price List Report

This report is a list of non-inventory products and their corresponding information (taxability, rate, cost, etc.) for a service. The items listed in this report come from the "Non-Inventory" tab of your Products list at **Settings > Scheduling > Products > Non-Inventory > [product name] > Details**. The report can be filtered by Status.

| Name | Invoice Description | Part Number | Tax Treatment | Default Rate | Default Cost | Default Budgeted Hours | Income Account Name |
|---|---------------------------|-------------|---------------|--------------|--------------|------------------------|----------------------------|
| All Purpose Weed Control | All Purpose Weed Control | | Tax | 15.00 | 6.00 | 0.75 | Parts and Materials Income |
| Black Mulch (3 cu. yd) | Black Mulch (3 cu. yd) | | Tax | 22.00 | 13.65 | 0.25 | Parts and Materials Income |
| Color Mulch (3 cu. yd) | Color Mulch (3 cu. yd) | | Tax | 17.00 | 12.50 | 0.25 | Parts and Materials Income |
| Drive XL Herbicide | Drive XL Herbicide | | Tax | 6.00 | 1.00 | 0.00 | Parts and Materials Income |
| Dry Product 1 | Dry Product 1 | | Tax | 12.00 | 8.00 | 0.00 | Parts and Materials Income |
| Fertilizer | Fertilizer | | Tax | 7.50 | 3.00 | 0.00 | Parts and Materials Income |
| Flower Flat A | Flower Flat | | Tax | 15.00 | 11.50 | 0.10 | Parts and Materials Income |
| Flower Flat B | Flower Flat B | | Tax | 20.00 | 14.00 | 0.10 | Parts and Materials Income |
| Lawn Bags | Lawn Bags | | Tax | 6.00 | 2.00 | 0.00 | Parts and Materials Income |
| Product 1 | Product 1 | | Tax | 8.00 | 0.00 | 2.00 | Parts and Materials Income |
| Road Salt Tin | Road Salt Tin | | Tax | 250.00 | 180.00 | 0.00 | Parts and Materials Income |
| Roundup Pro Max | Roundup Pro Max | | Tax | 8.00 | 1.86 | 0.00 | Parts and Materials Income |
| Snow Roof Melt Pucks Calcium Chloride | Road Melt Pucks | | Tax | 3.50 | 2.39 | 0.00 | Parts and Materials Income |
| Snow Safe Melt Ice Melt (Coated Unsalt) Bag | Felt Safe Ice Melt | | Tax | 20.00 | 26.99 | 0.00 | Parts and Materials Income |
| Snow Saver Tin | Sand | | Tax | 150.00 | 45.00 | 0.00 | Parts and Materials Income |
| Snow Sawdust Box | Sawdust | | Tax | 36.00 | 28.00 | 0.00 | Parts and Materials Income |
| Snow Sodium Chloride Ice Melt Bag | Ice Melt Bag | | Tax | 12.00 | 8.59 | 0.00 | Parts and Materials Income |
| Snow Sodium Chloride 50# Bag | Road Salt | | Tax | 11.00 | 9.99 | 0.00 | Parts and Materials Income |
| Tallstar P (Tallstar One) | Tallstar P (Tallstar One) | | Tax | 0.00 | 0.00 | 0.00 | Parts and Materials Income |
| Winterizer | Winterizer | | Tax | 16.00 | 9.00 | 0.00 | Parts and Materials Income |

Description

Each column on this report represents a field on the **Product** overlay. This report is different from exporting your Product List because it does not contain all fields.

Paused Services Report

A list of paused services, including the pause date and restart date.

| Client Name | Address | Service | Pause Date | Restart Date |
|-------------------|---|---------------------|------------|--------------|
| Williams, Kalorie | 2140 E Campbell Rd Richardson, TX 75081 | Poop Scoop (3/week) | 8/30/2019 | 9/13/2019 |

Description

- Client Name** the name on the Account
- Address** the service address on the Account
- Service** the Service that is paused
- Pause Date** the date the Service was paused
- Restart Date** the date the Service was intended to be resumed (resuming a paused Service must be done manually)

Vendor Contact List Report

A list of third-party vendors and their contact information (for example: Home Depot, County Tax Office). The information for this report can be found at: **Team > Vendors > [vendor name] > Edit > Details/Contact**

| Name | Address | Type | Contact | Phone | All Contact | All Phone | Credit Limit |
|--------------|---------|------------------|---------|-------|-------------|-----------|--------------|
| MI Sales Tax | | Sales Tax agency | | | | | \$0.00 |
| TX Sales Tax | | Sales Tax agency | | | | | \$0.00 |

Description

- Credit Limit** This field is on the "Details" tab of the edit overlay for each Vendor.

Service Reports

Backlog Services Report

This report is a list of visits waiting to be completed. This report can be useful for helping you identify any Master Package rounds that may have been missed. There are many filters that you can apply.

| Client Name | Client Address | Source | Last Contact | Service | Start Date | End Date | Date Sold | Sub Status | Budgeted Hours | Actual Hours | Budgeted Amount | Actual Amount | Sales Rep |
|--------------------|--------------------------------------|-------------|--------------|------------------|------------|------------|-----------|------------|----------------|---------------|-----------------|---------------|-----------|
| Ben Roethlisberger | 347 Gore Rd Frisco, TX 4055 | Door Hanger | | Weatherization | 11/1/2018 | 11/30/2018 | 9/28/2018 | | 0.0000 | 0.0000 | \$0.00 | \$0.00 | |
| Ben Roethlisberger | 347 Gore Rd Frisco, TX 4055 | Door Hanger | | System Check | 7/1/2020 | 7/31/2020 | 9/28/2018 | | 0.0000 | 0.0000 | \$0.00 | \$0.00 | |
| Beth Iones | 3000 Copper Ridge Dr Plano, TX 75093 | | | Mosquito Control | 7/1/2020 | 7/31/2020 | 5/19/2020 | | 0.0000 | 0.0000 | \$0.00 | \$0.00 | |
| Total | | | | | | | | | 0.0000 | 0.0000 | \$0.00 | \$0.00 | |

Description

| | |
|------------------------|--|
| Client Name | the name on the client Account to be serviced |
| Client Address | the address to be serviced |
| Source | the source of the client Account |
| Last Contact | the last point of contact with the client |
| Service | the Job to be performed |
| Start Date | the earliest date the Job can be started |
| End Date | the latest date the Job can be finished |
| Date Sold | the date the Job was sold. This defaults to the date the Job was created. |
| Sub Status | any sub-status assigned to the Job. This typically prevents completion. |
| Budgeted Hours | the budgeted hours for the Job |
| Actual Hours | the actual hours worked on the Job |
| Budgeted Amount | the hourly amount you expect to make for the Job based on the budgeted hours |
| Actual Amount | the actual amount on the Job to be invoiced |
| Sales Rep | the Sales Rep who sold the job |

Calendar Events Report

A list of Calendar Events in a defined time frame. You can filter by different types of events (open, completed, or past due).

| Resource | Date Created | Notes | Start Date | End Date | Budgeted Hrs | Client Name | Source | Status |
|-----------------------|---------------------|--|------------|------------|--------------|---------------|--------|------------------|
| Aja Rivera (Aja) | 07/25/2018 10:04 PM | check h hours | 7/26/2018 | 7/31/2018 | 0.00 | | | Completed |
| Elle Palmer (LauralP) | 09/04/2019 10:59 AM | Go do the Estimate | 9/4/2019 | 9/4/2019 | 0.00 | Agent, Secret | | Dispatched |
| Aja Rivera (Aja) | 11/02/2020 12:49 PM | Client requested a new Estimate for flowers around back patio | 11/4/2020 | 11/4/2020 | 0.50 | Amari Cooper | | Pending Dispatch |
| Aja Rivera (Aja) | 11/17/2020 02:13 PM | Do the Estimate | 11/18/2020 | 11/18/2020 | 12.00 | Amari Cooper | | Pending Dispatch |
| Aja Rivera (Aja) | 11/18/2020 07:35 AM | Estimate for fertilization package, all turf on property, fruit trees in back. Advised client estimate will be done this week (by 11/20) | 11/19/2020 | 11/19/2020 | 12.00 | Morty Mouse | | Completed |

Description

| | |
|---------------------------|---|
| Resource | the Employee or Vendor who is assigned to the Calendar Event |
| Date Created | the date the Calendar Event was created |
| Notes | any notes that have been added to the Calendar Event |
| Start Date | corresponds to the Calendar Start Date on the "Details" tab of the Calendar Event overlay |
| End Date | corresponds to the Calendar End Date on the "Details" tab of the Calendar Event overlay |
| Priority | corresponds to the Priority dropdown list on the "Details" tab of the Calendar Event overlay. |
| Budgeted Hrs | the time you anticipate the Calendar Event to take to complete; corresponds to the Budgeted Man Hrs field on the "Details" tab of the Calendar Event overlay |
| Client/Lead/Vendor | the type assigned to a Calendar Event out of client, lead, or Vendor |
| Client Name | the name of the client that is assigned to a Calendar Event |
| Source | the source of the client assigned to a Calendar Event |
| Status | the status of the Calendar Event |

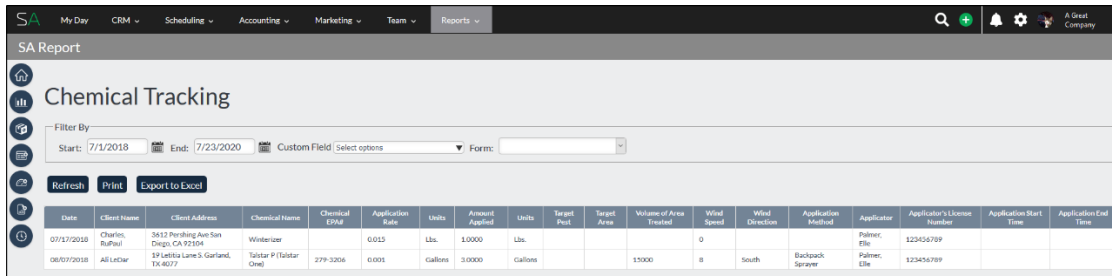
Chemical Tracking Report

This report is a list of applied chemicals including their details, such as EPA number, amount, and weather conditions. You must have Chemical Tracking enabled and set up for this report to be available.

The report is based on the information entered on Chemical Jobs using Chemical Services and Products.

Go to **Reports > Report Center >  A Reports > Service Reports > Chemical Tracking.**

The Chemical Tracking report can be filtered by date range, custom field, and resource team:



| Date | Client Name | Client Address | Chemical Name | Chemical EPA# | Application Rate | Units | Amount Applied | Units | Target Pest | Target Area | Volume of Area Treated | Wind Speed | Wind Direction | Application Method | Applicator | Applicator's License Number | Application Start Time | Application End Time |
|------------|-----------------|--------------------------------------|-------------------------|---------------|------------------|---------|----------------|---------|-------------|-------------|------------------------|------------|----------------|--------------------|--------------|-----------------------------|------------------------|----------------------|
| 07/17/2018 | Charles Ruffell | 5412 Penning Ave San Diego, CA 92104 | Winterizer | | 0.015 | Lbs. | 1.0000 | Lbs. | | | | 0 | | | Palmer, Elie | 123456789 | | |
| 08/07/2018 | All Leotar | 19 Letitia Lane S. Garland, TX 75042 | Talstar P (Talstar One) | 279-3306 | 0.001 | Gallons | 3.0000 | Gallons | | | 15000 | 8 | South | Backpack Sprayer | Palmer, Elie | 123456789 | | |

Description

| | |
|------------------------------------|---|
| Date | the date of the service |
| Client Name | the name of the client who was serviced |
| Client Address | the address of the property that was serviced |
| Chemical Name | the name of the chemical product used on the Job |
| Chemical EPA# | this corresponds to the EPA Registration # field on the "Product Mix" tab of the chemical product |
| Application Rate | the application rate for the product based on the information entered in the Application Rate section on the "Product Mix" tab of the chemical product |
| Budgeted Concentrate Amount | The total amount of chemical product to be used |
| Actual Concentrate Amount | the total amount of chemical product actually used |
| Targets | the Target the chemical product is designed to kill |
| Areas Treated | the areas where the chemical product is to be applied |
| Amount of Area Treated | the value in the custom field designated on the "Product Mix" tab of the chemical product |

| | |
|-------------------------------|--|
| Temp | the temperature entered at the time of application |
| Wind Speed | the wind speed entered at time of application |
| Wind Direction | the wind direction entered at time of application |
| pH Level | pH level of the chemical product entered at the time of application. |
| Application Method | how the chemical product was applied to the property |
| Applicator | the Resource who applied the chemical product. This field requires the Applicator License # field be filled in. |
| Applicator's License # | the license number of the Resource who applied the chemical product |
| Application Start Time | the time the Job was started. This field requires the Applicator License # field be filled in. |
| Application End Time | the time the Job was completed. This field requires the Applicator License # field be filled in. |

Add a Form to the Report

If your state requires more information than this report provides by default, you can create Forms in which the field technician can log additional information.

When creating a Form, make sure the Form is associated with the **Chemical Service**, so that it's available on the Legacy app for the technician. This information is automatically added to the **Chemical Tracking** report. Each field on the form will become a column on the **Chemical Tracking** report.

Client Count by Service Report

This report is a list of how many services have been sold and what percentage of your business it represents. This report is very simple and has no additional filters:

| Service | Number Of Clients | Percentage |
|-------------------------------|-------------------|------------|
| 17" Mower | 1 | 1.03% |
| 21" Mower | 1 | 1.03% |
| 25" Mower | 1 | 1.03% |
| Air Quality Inspection | 2 | 2.06% |
| Bed Maintenance | 21 | 21.65% |
| Commercial Maintenance | 4 | 4.12% |
| Early Spring Application | 6 | 6.19% |
| Early Summer Application (RM) | 1 | 1.03% |
| Early Winter Application | 1 | 1.03% |
| Edging | 5 | 5.15% |
| Fall Application | 2 | 2.06% |
| Fall Clean Up | 6 | 6.19% |
| Fertilization | 4 | 4.12% |
| Flower Bed Weed Control | 6 | 6.19% |
| Flower Installation | 9 | 9.28% |
| General Clean Up | 3 | 3.09% |

Description

A total number of **Clients with Services** will display above the table.

- Service** the name of the Service assigned to the client
- Number of Clients** the number of clients with the given Service. This does not include cancelled or former clients.
- Percentage** the percentage the given service makes up of all services for all clients. In the example above, 21 clients are assigned the "Bed Maintenance" Service and this accounts for 21.65% of all jobs for all clients.

Client Services Report

This report shows active Services for each client. You can filter this report by Custom Field, Service, Customer, and whether you want assignments to show.

| Client | Package / Schedule | Work Order | Service | Rate | Quantity | Amount | Budgeted Hours | Address 1 | Address 2 | City | State | Postal Code | MapCode | Cell Phone | Fax | Home Phone | Other Phone | Latitude | Longitude | Resources |
|-----------------|--------------------|------------|-------------------------------|----------|----------|----------|----------------|-----------------------|-----------|--------|-------|-------------|---------|------------|------------|------------|-------------|------------------|-------------------|-------------|
| 2134 Felicia Dr | On Demand | N | Snow Plow | Varies | 0.0000 | Varies | Varies | 2134 Felicia Dr | | Plano | Texas | 75074 | | | | | | 32.9854616433651 | -96.7186318957422 | Snow Plow 2 |
| A.J. Green | One Time | N | Bed Maintenance | 0.0100 | 1.0000 | 0.0100 | 0.0000 | 22 Eszenhower Drive | | Frisco | Texas | 4055 | | 2079951138 | | | | 33.2235222 | -96.6569493 | Mow Crew 1 |
| A.J. Green | One Time | N | Bed Maintenance | 0.0100 | 1.0000 | 0.0100 | 0.0000 | 22 Eszenhower Drive | | Frisco | Texas | 4055 | | 2079951138 | | | | 33.2235222 | -96.6569493 | Elle Palmer |
| A.J. Green | One Time | N | Flower Installation | 0.0000 | 1.0000 | 0.0000 | 0.0000 | 22 Eszenhower Drive | | Frisco | Texas | 4055 | | 2079951138 | | | | 33.2235222 | -96.6569493 | Mow Crew 1 |
| A.J. Green | One Time | N | Holiday Cleanup | 0.0000 | 1.0000 | 0.0000 | 0.0000 | 22 Eszenhower Drive | | Frisco | Texas | 4055 | | 2079951138 | | | | 33.2235222 | -96.6569493 | |
| A.J. Green | Weekly - Saturday | N | Lawn Mowing | 55.0000 | 1.0000 | 55.0000 | 0.0000 | 22 Eszenhower Drive | | Frisco | Texas | 4055 | | 2079951138 | | | | 33.2235222 | -96.6569493 | |
| A.J. Green | Weekly - Wednesday | N | Lawn Mowing | 32.0000 | 1.0000 | 32.0000 | 0.0000 | 22 Eszenhower Drive | | Frisco | Texas | 4055 | | 2079951138 | | | | 33.2235222 | -96.6569493 | |
| Aaron Rodgers | On Demand | N | Snow Plow | Varies | 0.0000 | Varies | Varies | 3409 Singletree Trail | | Plano | Texas | 75023 | | | | 5089995968 | | 33.0477104187012 | -96.7596425546875 | Snow Plow 2 |
| Adam Thelen | On Demand | N | Snow Plow | Varies | 0.0000 | Varies | Varies | 3321 Cross Bend Rd | | Plano | Texas | 75023 | | 2073293448 | | | | 33.0494194030762 | -96.7572174072266 | Snow Plow 2 |
| Adam Thelen | One Time | N | Early Summer Application (RM) | 0.0000 | 1.0000 | 0.0000 | 0.0000 | 3321 Cross Bend Rd | | Plano | Texas | 75023 | | 2073293448 | | 2076472352 | | 33.0494194030762 | -96.7572174072266 | Elle Palmer |
| Adamson, Adam | One Time | N | Bed Maintenance | 0.0100 | 1.0000 | 0.0100 | 0.0000 | 8323 Glen Regal Dr | | Dallas | Texas | 75243 | | | | 5555555555 | | 32.920204 | -96.7579099 | Elle Palmer |
| Adamson, Adam | One Time | N | Fall Clean Up | 350.0000 | 1.0000 | 350.0000 | 0.0000 | 8323 Glen Regal Dr | | Dallas | Texas | 75243 | | | | 5555555555 | | 32.920204 | -96.7579099 | Elle Palmer |
| Adamson, Adam | One Time | N | Lawn Care Maintenance | 0.0000 | 1.0000 | 0.0000 | 0.0000 | 8323 Glen Regal Dr | | Dallas | Texas | 75243 | | | | 5555555555 | | 32.920204 | -96.7579099 | Elle Palmer |
| Alex Collins | Custom Recurring | N | Landscape Maintenance | 112.0000 | 1.0000 | 112.0000 | 0.0000 | 3924 Mission Ridge Rd | | Plano | Texas | 75023 | | 1111111111 | 5082593784 | 6475360 | | 33.050912 | -96.7591228 | |
| Alex Collins | On Demand | N | Snow Plow | Varies | 0.0000 | Varies | Varies | 3924 Mission Ridge Rd | | Plano | Texas | 75023 | | 1111111111 | 5082593784 | 6475360 | | 33.050912 | -96.7591228 | Snow Plow 2 |

Description

- Client** the name on the client Account
- Package/Schedule** the name of the Package, Master Schedule, or job type
- Work Order** whether or not a Job is also a Work Order
- Service** the Service on the Job
- Rate** the rate for the Job
- Quantity** the quantity on the job
- Amount** the total amount for the Job
- Budgeted Hours** the budgeted hours allotted to the Job
- Address 1** the first line of the service address
- Address 2** the second line of the service address
- City** the city for the service address
- State** the state for the service address
- Postal Code** the postal (zip) code for the service address

| | |
|--------------------|--|
| Map Code | the Map Code assigned to the Account |
| Cell Phone | the cell phone number assigned to the account |
| Fax | the fax number assigned to the account |
| Home Phone | the home phone number assigned to the Account |
| Other Phone | the other phone number assigned to the Account |
| Latitude | the latitude for the service address |
| Longitude | the longitude of the service address |
| Resources | the Resources assigned to the Job. This field will appear only if you select the Show Assignments filter. |

Custom Package Renewal Report

This report lists custom packages that are ready to renew within the time frame you specify.

Custom Package Renewal

Filter By

Start Date: End Date:

Refresh Print Export to Excel

<< Page 1 of 1 >>

| Client | Fname | Lname | Cust# | Ctype | Pphone | Pfax | Phome | Pcell | Pother | Pemail | Wadd1 | Wadd2 | Wcity | Wstate | Wzip | BAdd1 | BAdd2 | Bcity | Bstate | Bzip | Rdate | Notes | Package | Freq | PFreq\$ | Service Total |
|--------|-------|-------|-------|-------|--------|------|-------|-------|--------|--------|-------|-------|-------|--------|------|-------|-------|-------|--------|------|-------|-------|---------|------|---------|---------------|
|--------|-------|-------|-------|-------|--------|------|-------|-------|--------|--------|-------|-------|-------|--------|------|-------|-------|-------|--------|------|-------|-------|---------|------|---------|---------------|

<< Page 1 of 1 >>

HELP

Description

The report contains standard client information such as name, phone, and service and billing address.

| | |
|----------------------|--|
| Package | the name of the custom package. |
| Freq | the number of rounds in the package. |
| PFreq\$ | the set rate for rounds. |
| Service Total | the combined total of all the rounds from the package. |
| Cd | this column appears as you filter custom packages by date. each package round will have its own column titled "Cd1" "Cd2" etc. |

Over/Under Report

This report lists budgeted versus actual visits, hours, and revenue for Contracts and Installment Plans. This report must be filtered by the client and their installment plan:

SA Report

Over / Under Report

Filter By

Select a customer: Adamson, Adam

Select a customer's contract: Weekly Lawn Maintenance

Refresh

Contract Period: 03/09/2018 to 12/31/2018 for Adamson, Adam through 02/28/2019

| Service | Budgeted Visits | Actual Visits | Budgeted Hours | Actual Hours | Budgeted Contract Revenue | Actual Contract Revenue | Non Contract Revenue |
|-----------------------|-----------------|---------------|----------------|--------------|---------------------------|-------------------------|----------------------|
| Lawn Care Maintenance | 52 | 5 | 0.00 | 0.00 | \$425.00 | \$200.00 | \$0.02 |

| | Mar-2018 | Apr-2018 | May-2018 | Jun-2018 | Jul-2018 | Aug-2018 | Sep-2018 | Oct-2018 | Nov-2018 | Dec-2018 | Jan-2019 | Feb-2019 |
|---------------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| Contract Value | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$50.00 | \$50.00 | \$50.00 | \$50.00 | \$0.00 | \$0.00 |
| Contract Earned | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Over / Under | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$50.00 | \$50.00 | \$50.00 | \$50.00 | \$0.00 | \$0.00 |
| Non Contract Earned | \$0.00 | \$0.02 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Total Earned | \$0.00 | \$0.02 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Contract Payments | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |

| Service | Date | Resource | Budgeted Hours | Actual Hours | Rate | Contract |
|-----------------------|------------|------------|----------------|--------------|---------|----------|
| Lawn Care Maintenance | 03/12/2018 | Mow Crew 1 | 0.00 | 0.00 | \$0.00 | Y |
| Lawn Mowing | 03/26/2018 | LauraP | 0.00 | 0.00 | \$0.00 | Y |
| Lawn Mowing | 04/16/2018 | LauraP | 0.00 | 0.00 | \$0.00 | Y |
| Bed Maintenance | 04/27/2018 | LauraP | 0.00 | 0.00 | \$0.01 | N |
| Lawn Mowing | 06/11/2018 | Joe | 0.00 | 0.00 | \$18.00 | Y |
| Lawn Mowing | 07/09/2018 | Joe | 0.00 | 0.00 | \$24.00 | Y |

Description

The information in the table is divided into three sections:

Contract Services

- Service** the line item on the Contract/Installment Plan
- Budgeted Visits** quantity or visits on the Contract/Installment Plan
- Actual Visits** completed visits that were billed to the Contract/Installment Plan
- Budgeted Hours** total budgeted hours for the Contract/Installment Plan
- Actual Hours** the actual recorded time spent on the visits billed to the Contract/Installment Plan
- Budgeted Contract Revenue** the total projected revenue for each month of the Contract/Installment Plan
- Actual Contract Revenue** sum of yearly invoiced amount for Contract/Installment Plan invoices
- Non-Contract Revenue** sum of non-contract line items on Contract/Installment Plan invoices

Earned Income

| | |
|----------------------------|--|
| Contract Value | shows the invoice amount for the month for the Contract/Installment Plan (Does not include added Products) |
| Contract Earned | originates from the service rate or added products to an invoice on the Job (regardless of the Contract/Installment Plan amount) |
| Over / Under | compares the difference between the rate applied for a visit versus the rate applied to a Contract/Installment Plan |
| Non Contract Earned | the rate for the same service not completed under the Contract/Installment Plan |
| Total Earned | combines the Contract Earned and Non Contract Earned columns |
| Contract Payments | This field shows the Contract/Installment Plan payment amount and the month it was recorded in the system. It's possible to divide this payment and apply portions of it to multiple months, but only the original contract payment amount appears in this field, under the month when it's recorded. This is the only field that includes any tax paid. |

Service Details

| | |
|-----------------------|--|
| Service | the Service completed for the client |
| Date | the date the Service was completed |
| Resource | the Resource assigned to the Job |
| Budgeted Hours | the budgeted hours on the Job |
| Actual Hours | the actual hours it took to complete the Job |
| Rate | the rate assigned on the Job |
| Contract | whether or not the Job was assigned to the Contract/Installment Plan on the current filter |

Package Sq Ft by Round Report

Shows packages grouped by the rounds assigned (for example, a fertilization package with six different applications). You can filter by custom fields.

This report shows packages grouped by the rounds assigned (for example, a fertilization package with six different applications). You can filter this report by custom fields:

| Package | Round | Budgeted Hours | Sq. Ft. | Remaining | Dispatched |
|----------------------|----------------------------|----------------|---------|-----------|------------|
| Irrigation | Irrigation - System Check | 0.0000 | 0.0000 | 0.0000 | 0.0000 |
| | Irrigation - Winterization | 0.0000 | 0.0000 | 0.0000 | 0.0000 |
| Mosquito Control (3) | Round 1 | 0.0000 | 0.0000 | 0.0000 | 0.0000 |
| | Round 2 | 0.0000 | 0.0000 | 0.0000 | 0.0000 |
| | Round 3 | 0.0000 | 0.0000 | 0.0000 | 0.0000 |
| Mowing Package | 17" Mower | 0.0000 | 0.0000 | 0.0000 | 0.0000 |
| | 21" Mower | 0.0000 | 0.0000 | 0.0000 | 0.0000 |
| | 25" Mower | 0.0000 | 0.0000 | 0.0000 | 0.0000 |

Description

| | |
|-----------------------|--|
| Package | the name of the Master Package |
| Round | the name of each round of the Master Package |
| Budgeted Hours | the total budgeted hours for the round |
| Sq. Ft. | the total of the selected Custom Field |
| Remaining | the Custom Field total remaining on pending visits |
| Dispatched | the Custom Field total for completed visits |

Package Summary Report

This report shows each Package and how many completed steps versus how many to-be-executed steps are left in the Package. You can filter the report by an individual package.

| Service | First | Last | Days | # Done | # Left | Earned | Pending |
|--|-------|------|------|--------|--------|--------|---------|
| Irrigation - System Check (07/01/2020 - 07/31/2020) | | | 0 | 0 | 1 | \$0.00 | \$0.00 |
| Irrigation - Winterization (11/01/2018 - 11/30/2018) | | | 0 | 0 | 1 | \$0.00 | \$0.00 |
| Irrigation - Winterization (11/01/2020 - 11/30/2020) | | | 0 | 0 | 1 | \$0.00 | \$0.00 |
| Total | | | 0 | 0 | 3 | \$0.00 | \$0.00 |

Total Visits: 3
 Total Revenue: \$0.00
 Avg. Revenue per Visit: \$0.00

Description

| | |
|----------------|---|
| Service | the name of each round of the Master Package |
| First | the first scheduled date for the round |
| Last | the last scheduled date for the round |
| Days | the number of dispatched visits (not completed) |
| # Done | completed visits |
| # Left | visits in "pending" status |
| Earned | revenue earned from completed visits |
| Pending | revenue earned from "pending" visits |

You can click into these columns to see all clients on the lists who have been or need to be dispatched. The column at the bottom shows the total number of visits, their total revenue, and the revenue average per visit.

Product and Service Usage

This report shows the life of a service or product regarding quantity and amount in three different stages: Estimate, Job, and Invoice. You can filter this report by date range, client, city, and postal (zip) code.

| Name | Estimate Quantity | Estimate Amount | Job Quantity | Job Amount | Invoiced Quantity | Invoiced Amount |
|-------------------------------|-------------------|-----------------|---------------|--------------------|-------------------|-----------------|
| Air Quality Inspection | 1.00 | \$124.00 | 4.00 | \$496.00 | 0.00 | \$0.00 |
| Bed Maintenance | 0.00 | \$0.00 | 78.10 | \$77.50 | 0.10 | \$2.50 |
| Commercial Maintenance | 1.00 | \$150.00 | 0.00 | \$0.00 | 0.00 | \$0.00 |
| Edging | 0.00 | \$0.00 | 2.00 | \$200.00 | 2.00 | \$200.00 |
| Fall Application | 0.00 | \$0.00 | 1.00 | \$0.02 | 0.00 | \$0.00 |
| Fertilizer | 0.00 | \$0.00 | 1.00 | \$7.50 | 0.00 | \$0.00 |
| Flower Bed Weed Control | 0.00 | \$0.00 | 49.00 | \$2,640.00 | 0.00 | \$0.00 |
| Flower Installation | 0.00 | \$0.00 | 44.00 | \$0.00 | 0.00 | \$0.00 |
| Holiday Cleanup | 0.00 | \$0.00 | 1.00 | \$0.00 | 0.00 | \$0.00 |
| Lawn Care Maintenance | 0.00 | \$0.00 | 207.00 | \$7,852.00 | 3.00 | \$100.00 |
| Lawn Mowing | 0.00 | \$0.00 | 400.00 | \$479.00 | 0.00 | \$0.00 |
| Monthly Maintenance Agreement | 0.00 | \$0.00 | 11.00 | \$0.00 | 0.00 | \$0.00 |
| Moquito Control | 0.00 | \$0.00 | 2.00 | \$0.00 | 0.00 | \$0.00 |
| Poop Scoop (2/week) | 0.00 | \$0.00 | 12.00 | \$107.40 | 0.00 | \$0.00 |
| Poop Scoop (3/week) | 0.00 | \$0.00 | 105.00 | \$834.75 | 0.00 | \$0.00 |
| Snow Contract Agreement | 0.00 | \$0.00 | 5.00 | \$0.00 | 5.00 | \$0.00 |
| Summer Application | 0.00 | \$0.00 | 1.00 | \$44.00 | 0.00 | \$0.00 |
| System Check | 0.00 | \$0.00 | 1.00 | \$0.00 | 0.00 | \$0.00 |
| Totals | 2.00 | \$274.00 | 944.10 | \$12,760.17 | 10.10 | \$302.50 |

Description

- Name** the name of the services or products
- Estimate Quantity** the number of Estimates in a stage of "sent" that contain the Service or Product
- Estimate Amount** the total dollar value for the Service or Product across all Estimates in a stage of "sent"
- Job Quantity** the quantity of jobs scheduled for a Service or Product
- Job Amount** the total dollar value for the Service or Product across all scheduled jobs
- Invoiced Quantity** the quantity of an item based on invoices generated
- Invoiced Amount** the total dollar value of an item across all generated invoices

If services and products are added to one-time visits, they appear in the job columns and invoice columns after completion.

What's Not Included: Sales tax.

Revenue and Budgeted Hours Projection Report

This report shows the projected budgeted staff hours and revenue for the next 12 months. It can help you identify budgeting inaccuracies, such as overestimating your budgeted hours.

The report is based on all currently scheduled visits, except for canceled visits, within the month. It also includes visits regardless of invoice status, Waiting List visits, and expired visits that are still on the Waiting List.

| Month | Year | Total | B. Hrs | Contract | B. Hrs | Hourly | B. Hrs | Per Visit | B. Hrs |
|--------------|------|--------------------|-------------|-----------------|------------|-----------------|------------|--------------------|------------|
| July | 2020 | \$4,104.05 | 2.3 | \$100.00 | 0.0 | \$37.40 | 1.1 | \$3,966.65 | 1.2 |
| August | 2020 | \$4,263.77 | 2.1 | \$100.00 | 0.0 | \$29.92 | 0.9 | \$4,153.85 | 1.2 |
| September | 2020 | \$4,717.25 | 2.6 | \$100.00 | 0.0 | \$37.40 | 1.1 | \$4,579.85 | 1.3 |
| October | 2020 | \$4,292.72 | 2.1 | \$100.00 | 0.0 | \$29.92 | 0.9 | \$4,162.80 | 1.2 |
| November | 2020 | \$4,063.77 | 2.1 | \$100.00 | 0.0 | \$29.92 | 0.9 | \$3,933.85 | 1.2 |
| December | 2020 | \$4,717.25 | 2.6 | \$100.00 | 0.0 | \$37.40 | 1.1 | \$4,579.85 | 1.5 |
| January | 2021 | \$434.05 | 0.0 | \$0.00 | 0.0 | \$0.00 | 0.0 | \$434.05 | 0.0 |
| February | 2021 | \$410.30 | 0.0 | \$0.00 | 0.0 | \$0.00 | 0.0 | \$410.30 | 0.0 |
| March | 2021 | \$457.90 | 0.0 | \$0.00 | 0.0 | \$0.00 | 0.0 | \$457.90 | 0.0 |
| April | 2021 | \$434.05 | 0.0 | \$0.00 | 0.0 | \$0.00 | 0.0 | \$434.05 | 0.0 |
| May | 2021 | \$434.05 | 0.0 | \$0.00 | 0.0 | \$0.00 | 0.0 | \$434.05 | 0.0 |
| June | 2021 | \$434.05 | 0.0 | \$0.00 | 0.0 | \$0.00 | 0.0 | \$434.05 | 0.0 |
| Total | | \$38,793.15 | 13.7 | \$600.00 | 0.0 | \$201.96 | 3.9 | \$37,961.15 | 7.8 |

Description

Services are divided into service modes: **Contract, Hourly, and Per Visit**. Budgeted Hours display for each month based on the service mode.

For **hourly services**, the report calculates the budgeted hours times the hourly rate for the Service. If B. Hrs are not entered, then the system will assume 1 hour.

The **Total** at the bottom of the table for the “Total” column is the total combined revenue from all service modes.

Sales Count by Sales Rep Report

This report shows a count of sold services and products sold per Sales Rep in any defined time frame. You can filter by date range, service or product, and Sales Rep.

| Sales Rep | Air Quality Inspection | Bed Maintenance | Black Mulch (1 cu. yd.) | Early Spring Application | Early Summer Application (20k) | Edging | Fall Application | Fall Clean Up | Fertilization/Fertilize | Flower Bed Wood Control | Flower Installation | Grubbing | Holiday Cleanup | Landscape Maintenance | Lawn Care Maintenance | Lawn Mowing | Mosquito Control | Poop Scoop (2/week) | Poop Scoop (3/week) | Snow Plow | Snow Removal | Summer Application | Wood Control | Total Sales |
|-----------|------------------------|-----------------|-------------------------|--------------------------|--------------------------------|--------|------------------|---------------|-------------------------|-------------------------|---------------------|----------|-----------------|-----------------------|-----------------------|-------------|------------------|---------------------|---------------------|-----------|--------------|--------------------|--------------|-------------|
| | 3 | 19 | 1 | 2 | 1 | 2 | 1 | 5 | 2 | 6 | 6 | 1 | 1 | 2 | 18 | 35 | 1 | 7 | 6 | 19 | 2 | 1 | 1 | 143 |
| Totals | 3 | 19 | 1 | 2 | 1 | 2 | 1 | 5 | 2 | 6 | 6 | 1 | 1 | 2 | 18 | 35 | 1 | 7 | 6 | 19 | 2 | 1 | 1 | 143 |

This report displays data a bit differently than other reports. The columns reflect the services and products based on the other search parameters.

Description

Sales Rep the names of any Sales Reps (**Settings > Scheduling > Sales Reps**)

Service/Product name the number of sales per Sales Rep for each item.

Total Sales a cumulative total of each row of the table

Visits Report

The Visits Report is one of the most useful pre-built reports in the Report Center. It was designed to show any service within a defined time frame, the status of the job, and whether the actual man hours are more or less than the budgeted amount. The reason this report is so useful is because it has many data points. A lot of data can be extrapolated from this one report.

This report can be filtered by date, client, city, postal code, service, status, and/or resource. Each column on the report is explained below:

| Dates | Client Name | Service | Address | City | State | Postal Code | Resources | Budgeted Hours | Actual Hours | Amount | Actual \$/Man Hr | Debt \$/Man Hr | Rating | Status |
|------------|---------------|-----------------------|-----------------------------------|--------|-------|-------------|------------|----------------|--------------|---------|------------------|----------------|--------|------------------|
| | Allen Area | # of Visits: 1 | | | | | | | | \$38.00 | | | | |
| 07/21/2020 | Allen Area | Lawn Care Maintenance | 1413 Cibolo Dr | Allen | TX | 75013 | Mow Crew 1 | 0.0000 | 0.00 | \$38.00 | \$0.00 | \$0.00 | ▼ | Pending Dispatch |
| | Starter Bill | # of Visits: 1 | | | | | | | | \$38.00 | | | | |
| 07/21/2020 | Starter Bill | Lawn Care Maintenance | New Address | Allen | TX | 75013 | Mow Crew 1 | 0.0000 | 0.00 | \$38.00 | \$0.00 | \$0.00 | ▼ | Pending Dispatch |
| | Big Cheese | # of Visits: 1 | | | | | | | | \$38.00 | | | | |
| 07/21/2020 | Big Cheese | Lawn Care Maintenance | 1402 San Saba Ct | Allen | TX | 75013 | Mow Crew 1 | 0.0000 | 0.00 | \$38.00 | \$0.00 | \$0.00 | ▼ | Pending Dispatch |
| | Bill Custom | # of Visits: 1 | | | | | | | | \$38.00 | | | | |
| 07/21/2020 | Bill Custom | Lawn Care Maintenance | 1408 San Saba Ct, Allen TX, 75013 | Allen | TX | 75013 | Mow Crew 1 | 0.0000 | 0.00 | \$38.00 | \$0.00 | \$0.00 | ▼ | Pending Dispatch |
| | Bobby Smacko | # of Visits: 1 | | | | | | | | \$38.00 | | | | |
| 07/21/2020 | Bobby Smacko | Lawn Care Maintenance | 1224 Concho Dr | Allen | TX | 75013 | Mow Crew 1 | 0.0000 | 0.00 | \$38.00 | \$0.00 | \$0.00 | ▼ | Pending Dispatch |
| | David Njoku | # of Visits: 1 | | | | | | | | \$0.00 | | | | |
| 07/21/2020 | David Njoku | Lawn Mowing | 31 Masfield Rd | Frisco | TX | 4055 | | 0.0000 | 0.00 | \$0.00 | \$0.00 | \$0.00 | ▼ | Pending Dispatch |
| | Evan Ingram | # of Visits: 1 | | | | | | | | \$0.00 | | | | |
| 07/21/2020 | Evan Ingram | Lawn Mowing | 19 Garden Lane | Frisco | TX | 4055 | | 0.0000 | 0.00 | \$0.00 | \$0.00 | \$0.00 | ▼ | Pending Dispatch |
| | George Morris | # of Visits: 1 | | | | | | | | \$38.00 | | | | |
| 07/21/2020 | George Morris | Lawn Care Maintenance | 1401 Cibolo Dr | Allen | TX | 75013 | Mow Crew 1 | 0.0000 | 0.00 | \$38.00 | \$0.00 | \$0.00 | ▼ | Pending Dispatch |
| | Jim Jackson | # of Visits: 1 | | | | | | | | \$0.00 | | | | |

Description

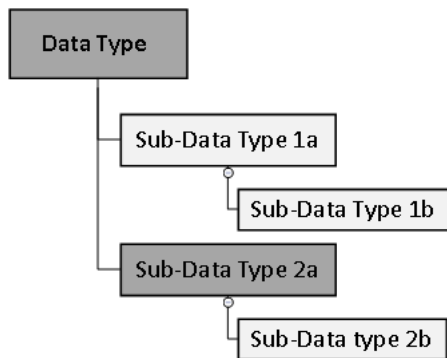
| | |
|-----------------------|---|
| Dates | the date of the scheduled job |
| Client Name | the name on the Account where service was scheduled |
| Service | the service to be performed |
| Address | the service address |
| City | the city where service will be performed |
| State | the state where service will be performed |
| Postal Code | the postal code where service will be performed |
| Resources | the resources that are scheduled on a job or clocked time on the job (if the job is complete) |
| Budgeted Hours | the total time you expect a job to take regardless of the number of resources working the job |

| | |
|-------------------------|--|
| Actual Hours | the total time worked on a job |
| Amount | the invoiced amount for the job (excluding tax) |
| Actual \$/Man Hr | the amount of money you made per hour spent on a job |
| Bdgt \$/Man Hr | the amount of money you planned to make per hour spent on a job |
| Rating | this will tell you if you are ahead (green) or behind (red) your targeted revenue; a comparison of actual to budgeted dollars per man hour |
| Status | the status of the job |

Note: The report tracks multi-day visits from the first scheduled date. The visits will appear on the report after completion.

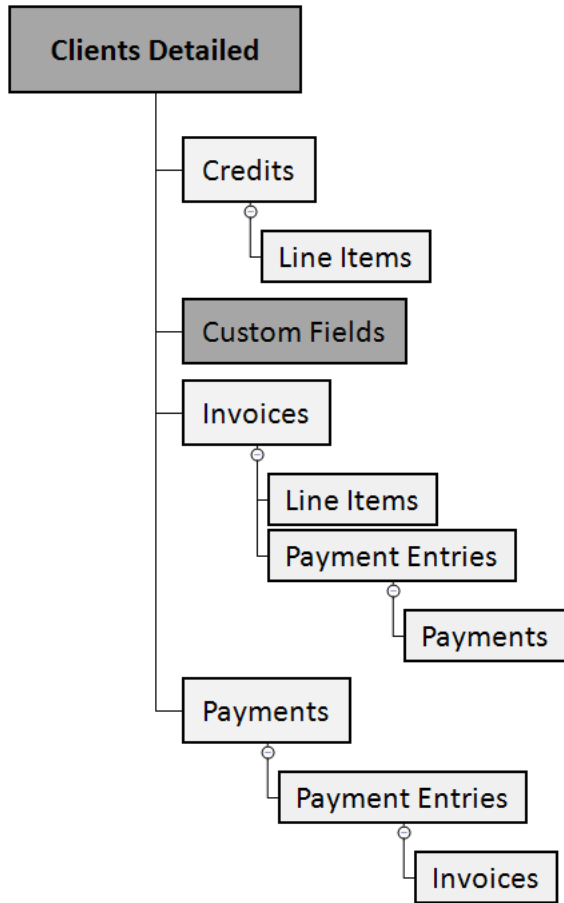
Overview of Analysis Data Types and Dependencies

When creating custom analyses, you can choose from different Data types that determine the layout of your analysis report. This section explains the different Data types and its associated branching within Service Autopilot.

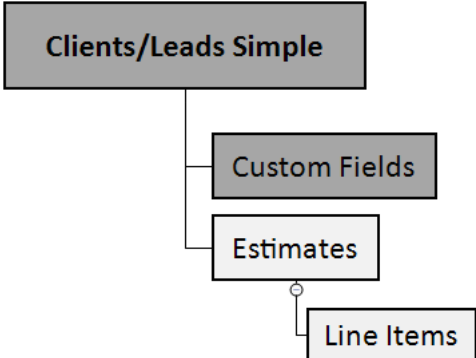


Note: All darkened subfields will be available within its branch, regardless of chosen dependent data type.

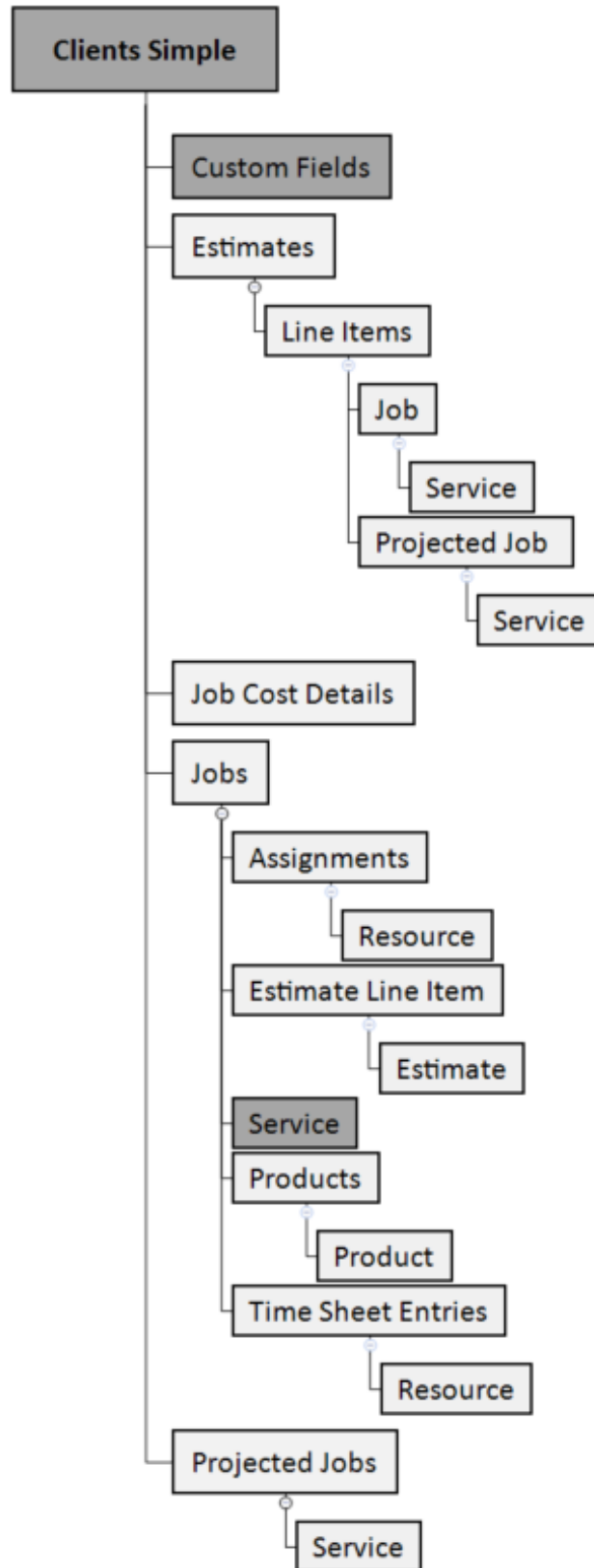
Clients Detailed



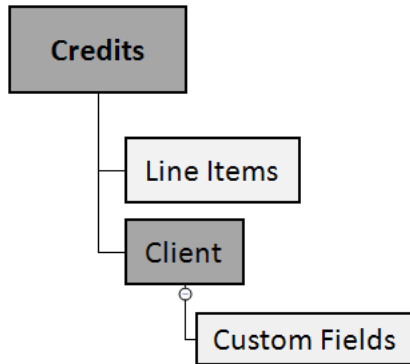
Clients/Leads Simple



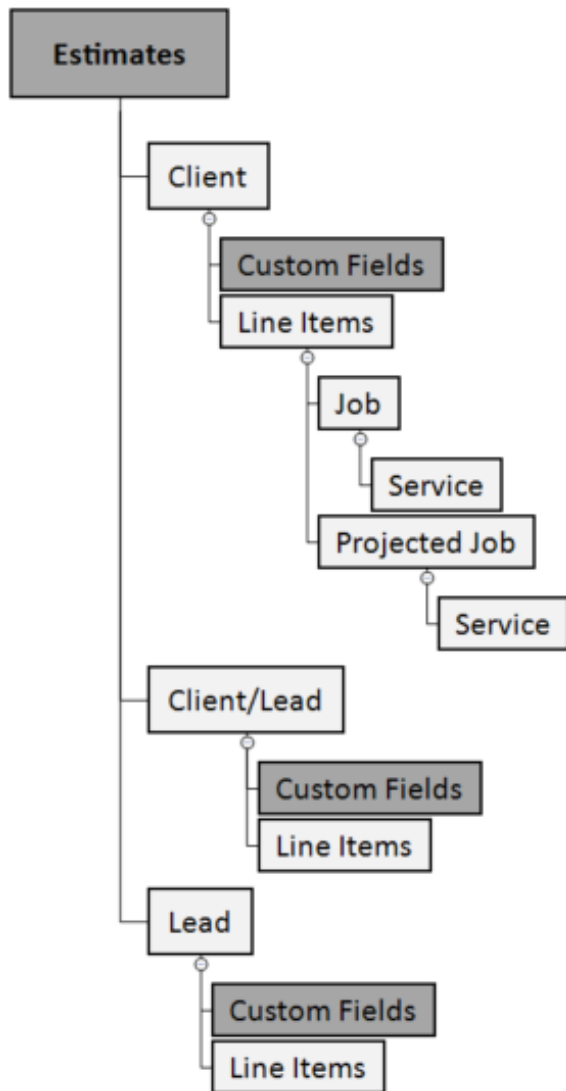
Clients Simple



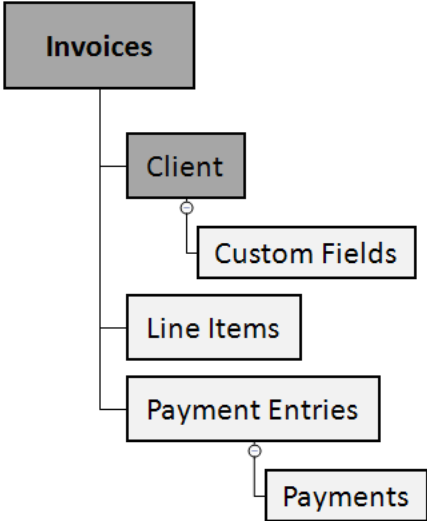
Credits



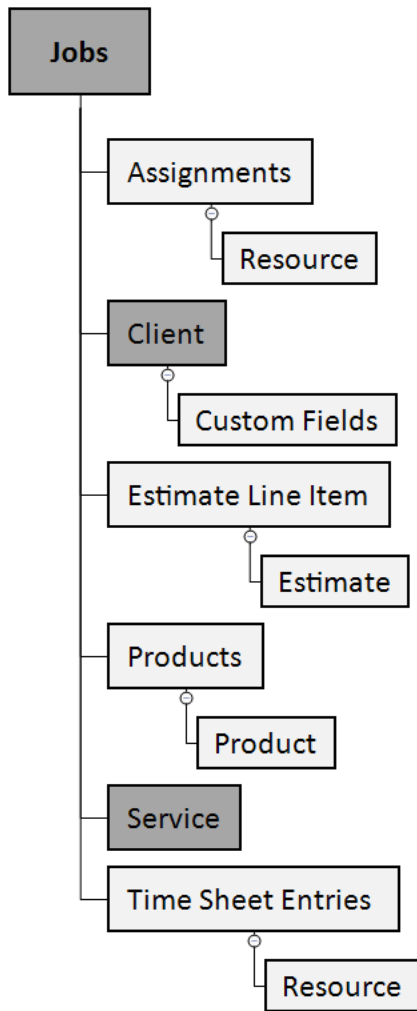
Estimates



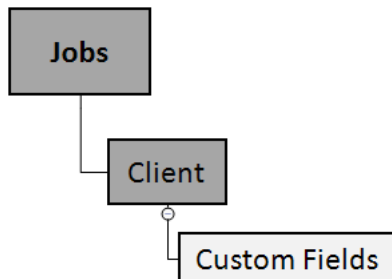
Invoices



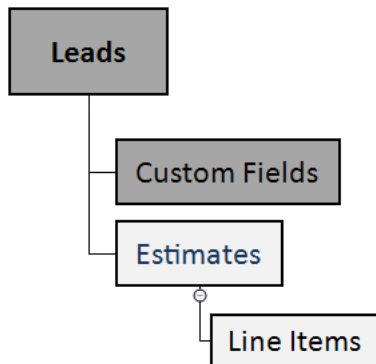
Jobs



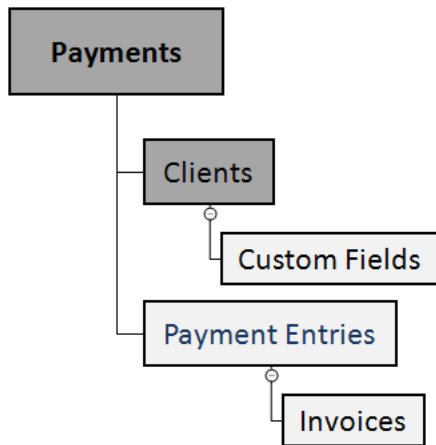
Job Cost Detail



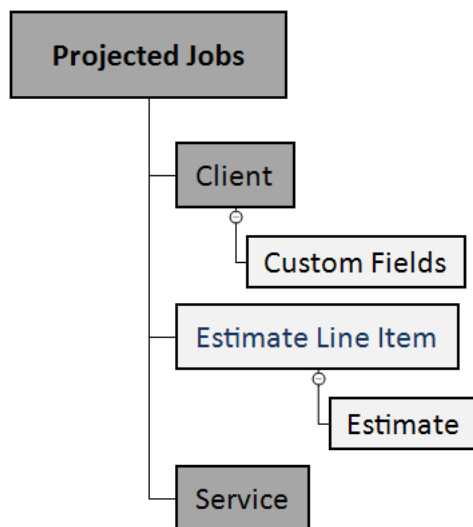
Leads



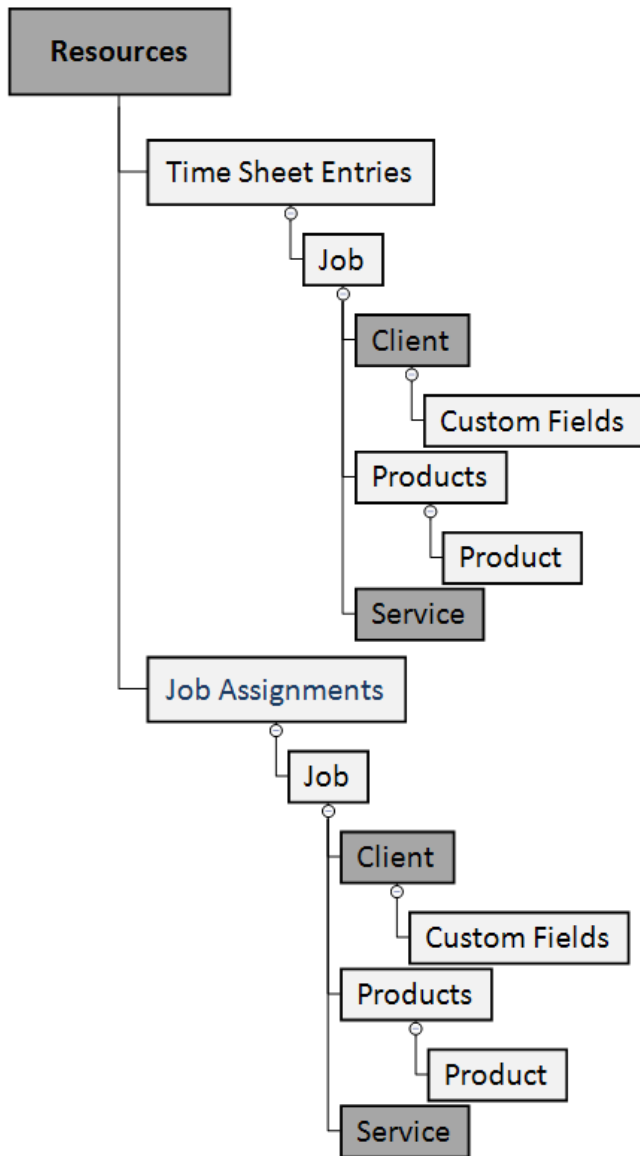
Payments



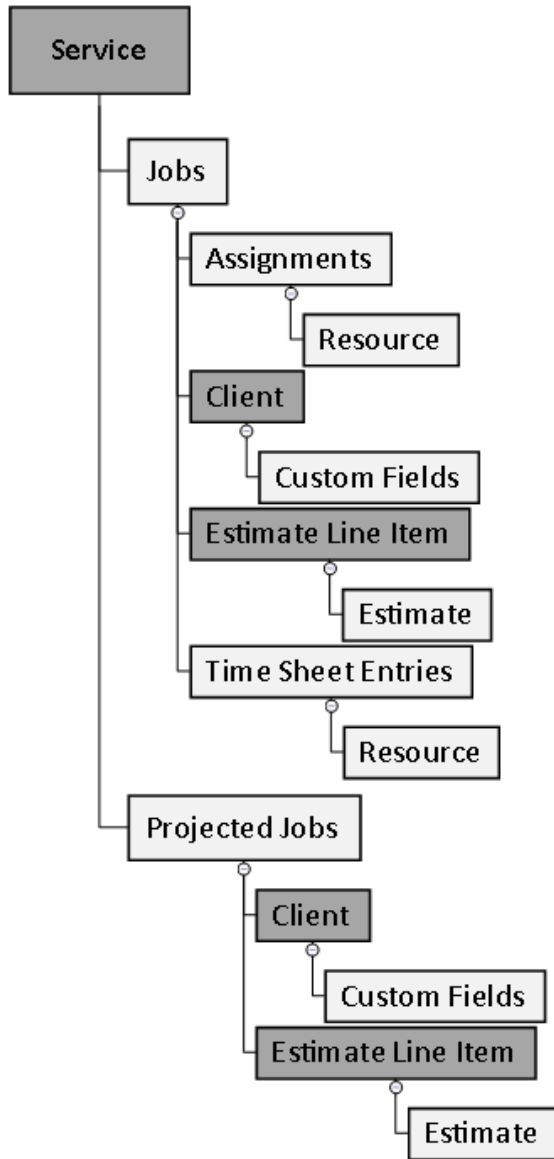
Projected Jobs



Resources



Service



Time Sheet Entry

