Service Autopilot™

REPORT CENTER

USER GUIDE

Contents

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."

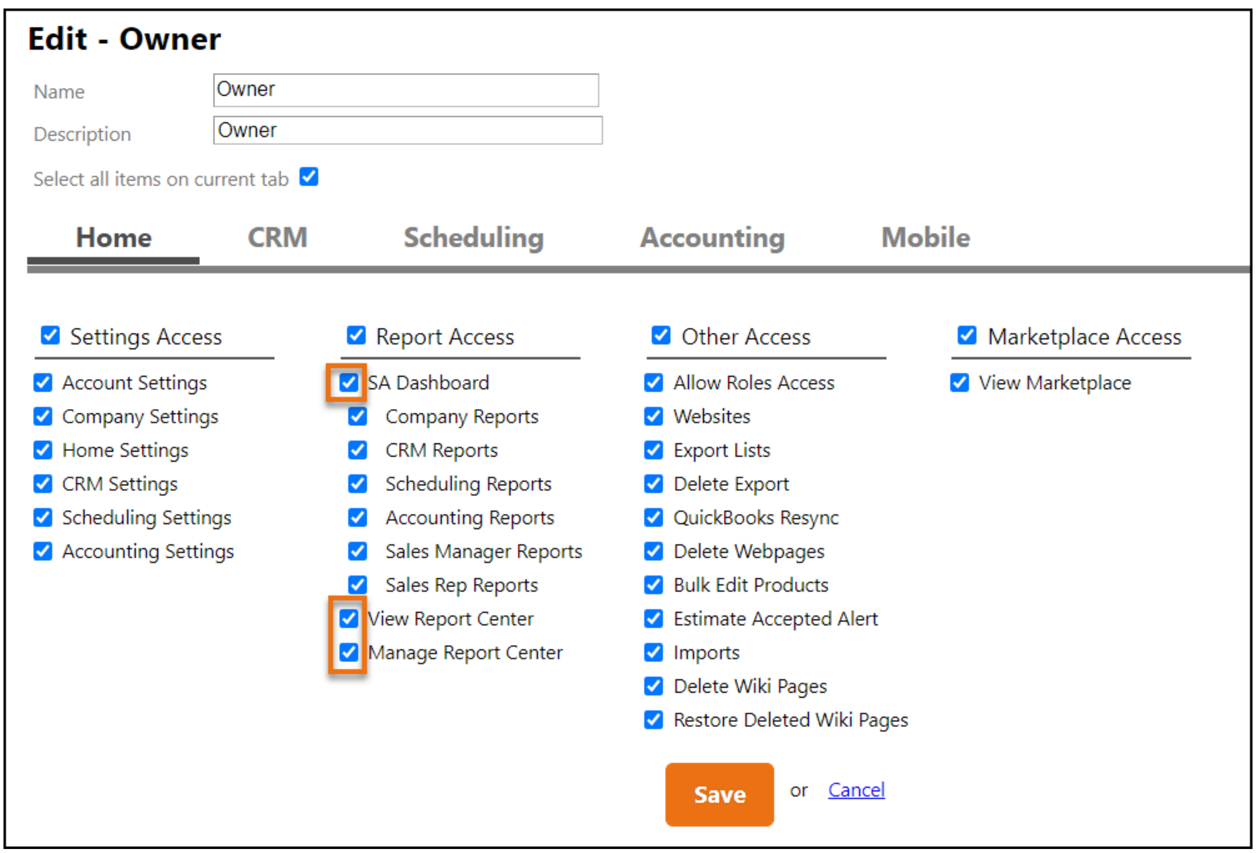
--Sir Francis Bacon

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.

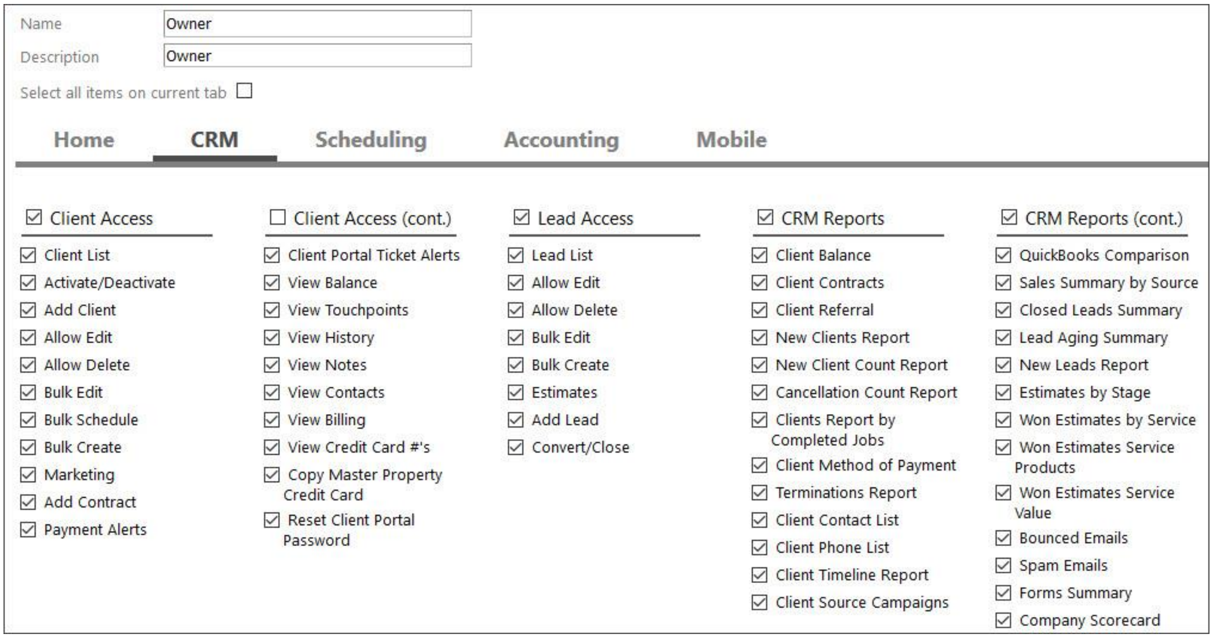
Follow these steps to change the settings:

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.



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.



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.

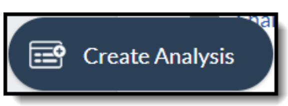
SA Dashboard (All Membership Levels)

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)

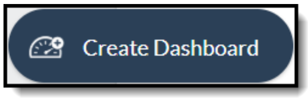
The SA Reports page lists all existing Service Autopilot reports. The report screen is divided by section, name of report, and its description. These are standard reports that are available to all members.

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)



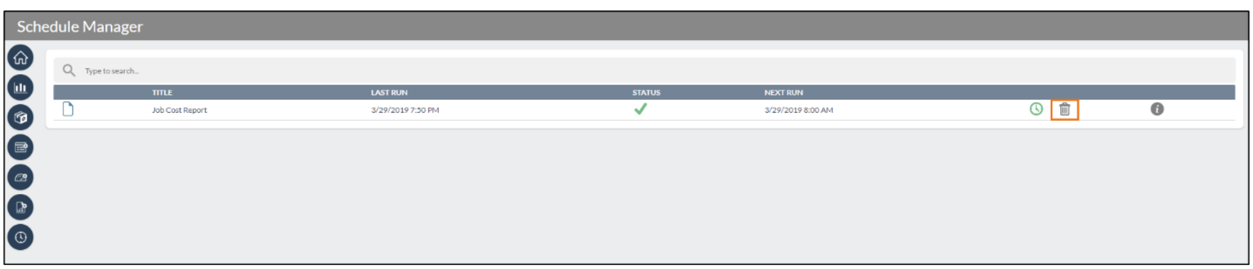
Dashboards are collections of live visual elements (such as pie charts and graphs). You can create these from your Visual Gallery, and group them to your liking. The visuals are placed into dashboard panels. When you create a new dashboard or change tab settings, the Visual Gallery will display. You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



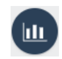
About the Report Center Dashboard

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.

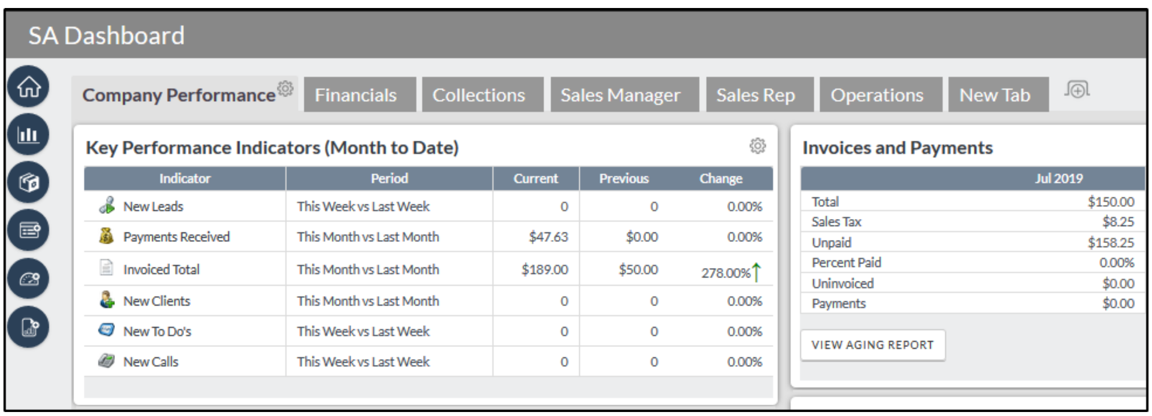
See the *Dashboard User Guide* for information on the Dashboard and available components.

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.

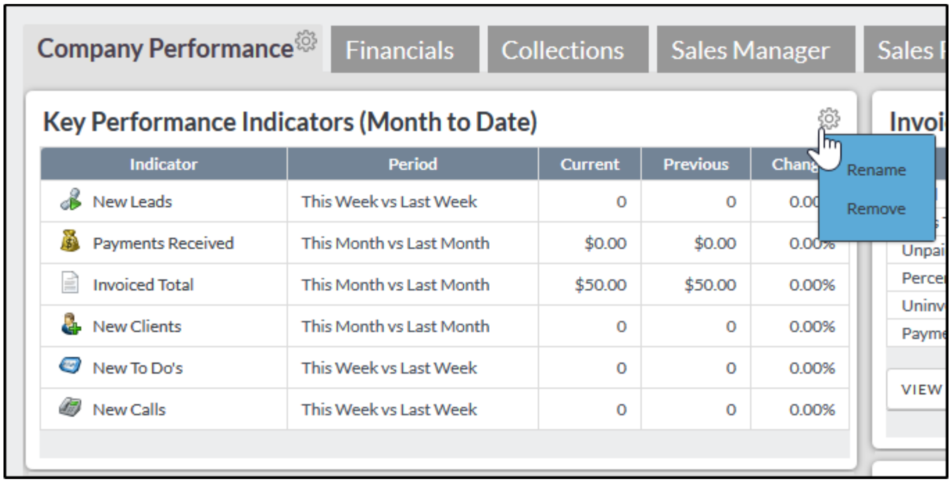
On your Dashboard screen, you'll see all types of useful features and tracking tools. For example:



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:



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

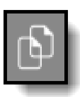
The **Create Analysis** menu in the Report Center lets you see your data in tables and charts. When you're creating an analysis, you have options that range from adding custom formulas to choosing charts and graphs.

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



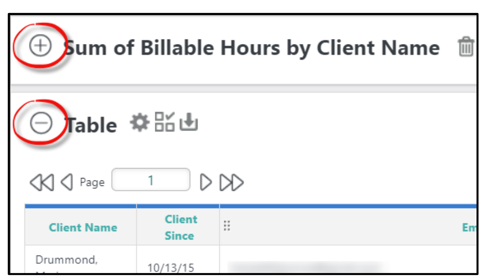
Use this feature to duplicate an analysis or report. You will get a confirmation message. Once confirmed, a copy of the analysis or report appears under the "My Items" folder on the Home screen.

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.

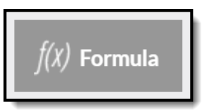
With the Report Center, you can "join" different data tables by continuing to add data types onto your analysis report. A join combines two sets of data to produce a single data set. Different types of joins produce different results.

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



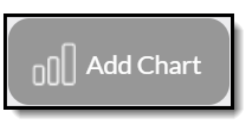
The **Formula** tab lets you add calculated columns to the data. Add new columns at the right side of the table or relocate them by dragging them.

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

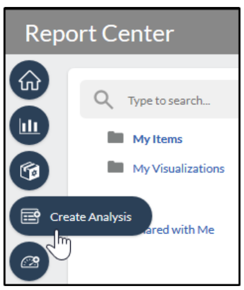
You can manage the Report Center after enabling **Manage Report Center** on the User Roles and Rights settings page. This section outlines common actions you can do in the Report Center.

Create a Custom Analysis

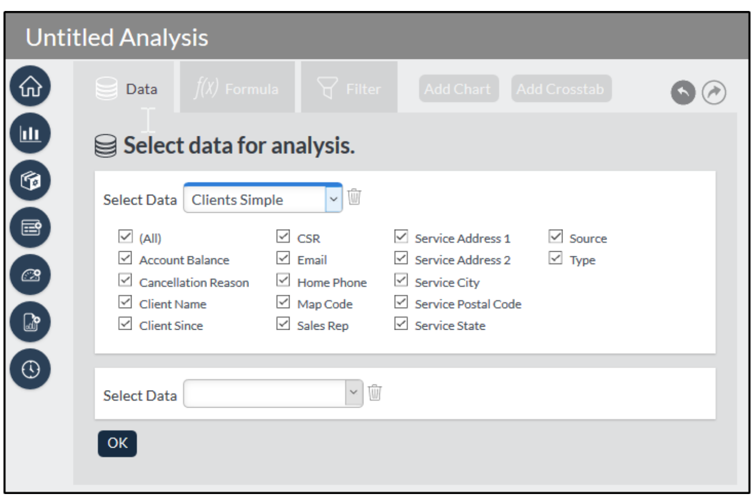
An analysis is not a report. It is the data you can use for a report. Think of the analysis as the patty in your report hamburger. You can put in as many analyses as you want.

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.

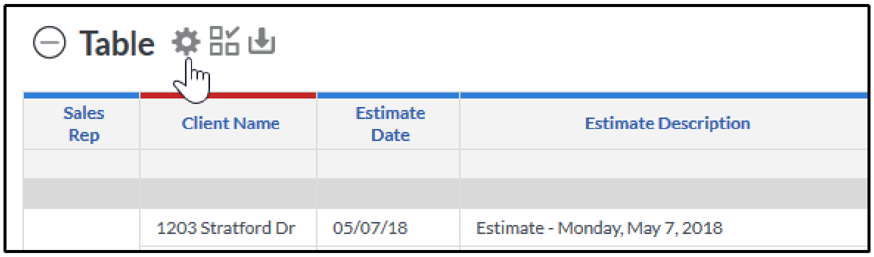


4. From this point, there are numerous additional directions for your analysis to go. An analysis can be as simple as a table if this accomplishes your goal.

   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.

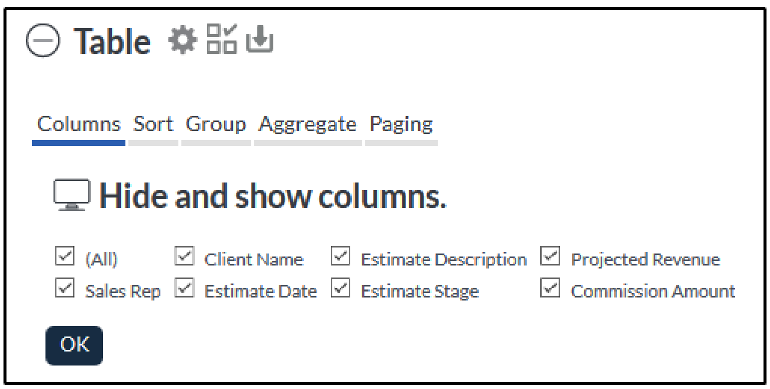
Modify a Table

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

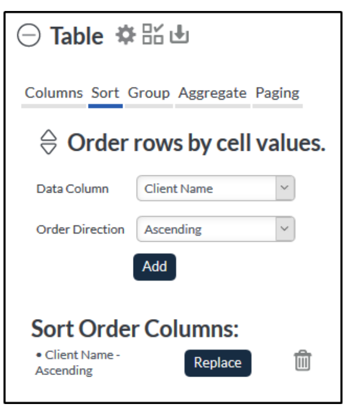


You can make changes to the analysis table in the following ways:

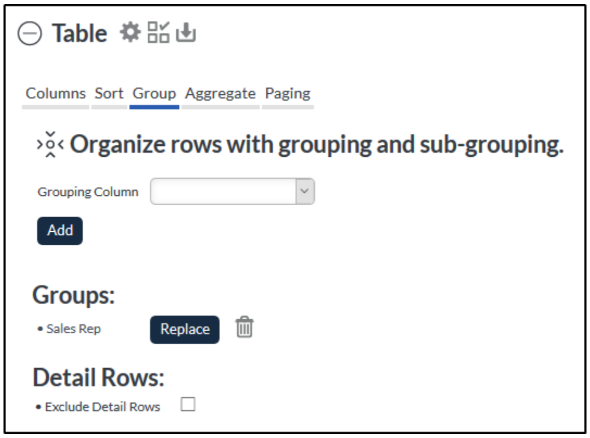
- **Hide or Show Columns** – select from a list of columns to hide or show:



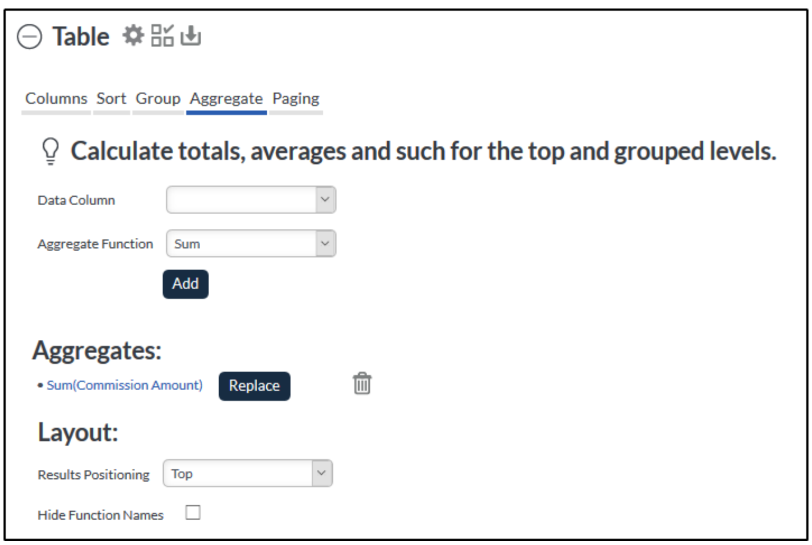
- **Sort** – sort a row's cell values (**Data Column**) in ascending or descending order (**Order Direction**) and replace or remove column order one it's been ordered (**Sort Order Columns**):



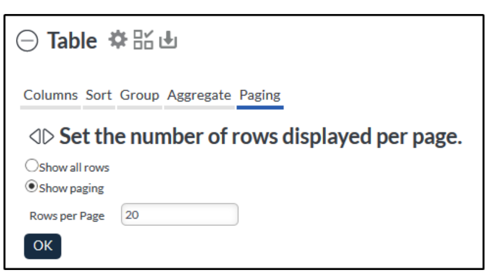
- **Group** – organize rows with grouping and sub-grouping (**Grouping Column**), replace or remove groups ("**Groups**"), and exclude details rows ("**Detail Rows**"):



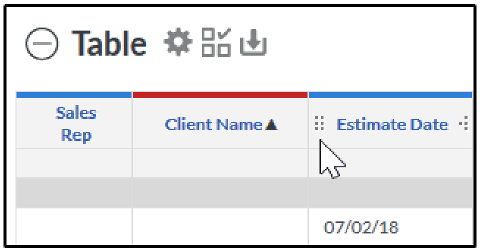
- **Aggregate** – this will calculate totals and/or averages. Set an **Aggregate Function** for a specific **Data Column**, replace or remove them ("**Aggregates**"), choose a position for the calculation results ("**Layout**"), and **Hide Function Names**:



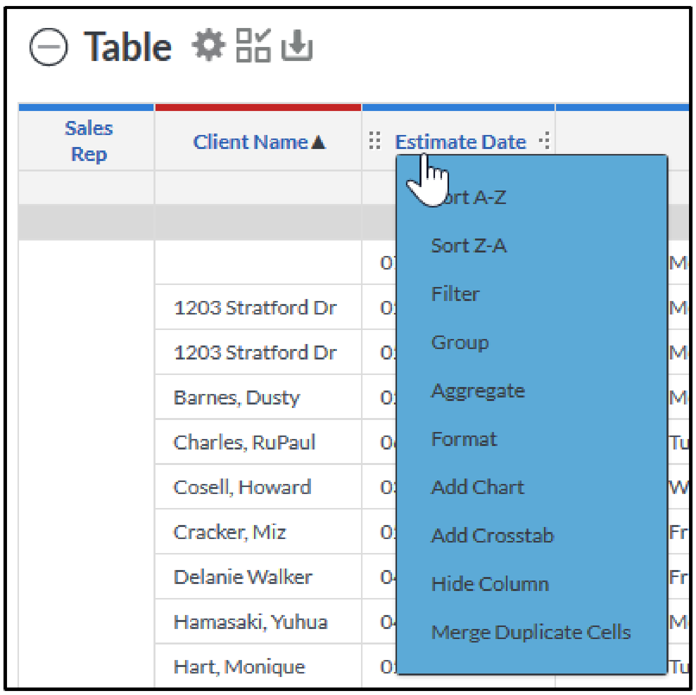
- **Paging** – choose to show all rows or split by paging and how many rows to show per page:



- **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:



- 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:



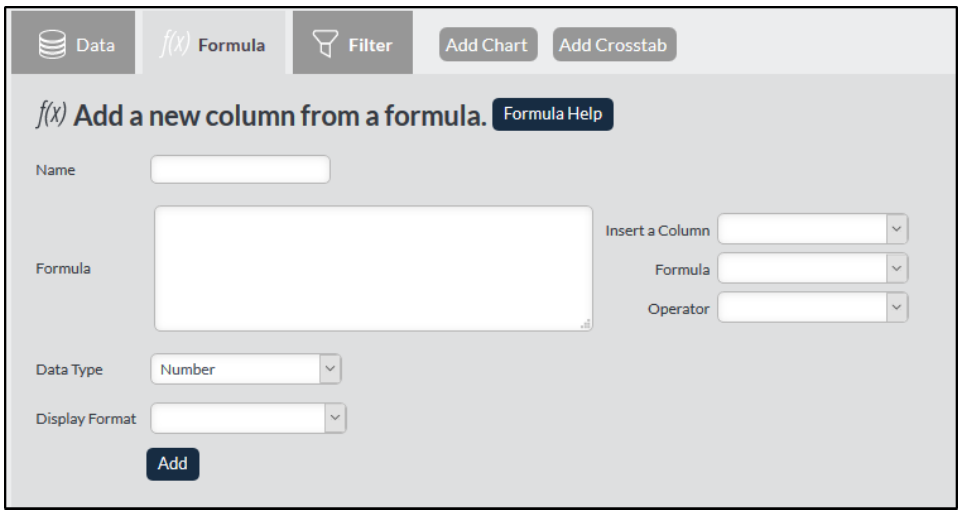
Add a Formula to an Analysis Table

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.



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.

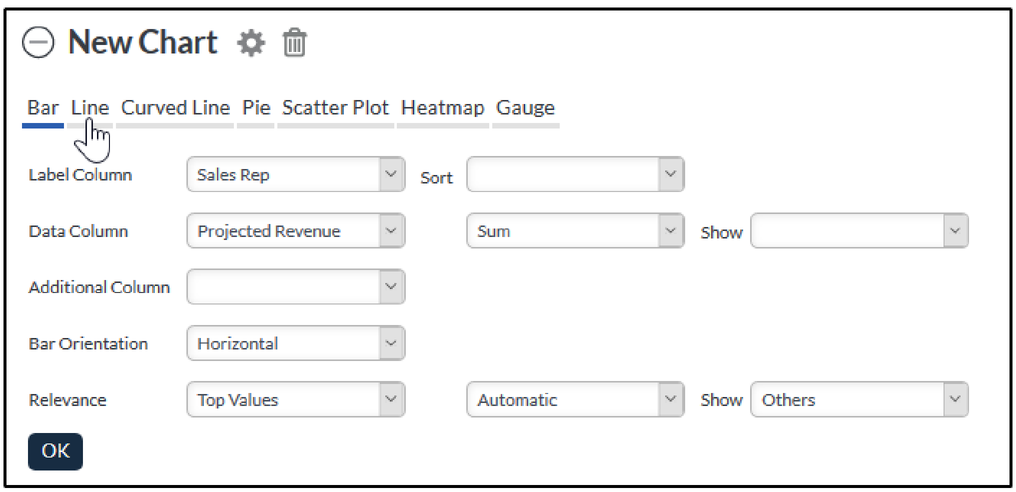
For more information: Check out this video for more information about SQL formulas or click here for a quick how-to video on creating simple calculations.

Add a Chart to an Analysis Table

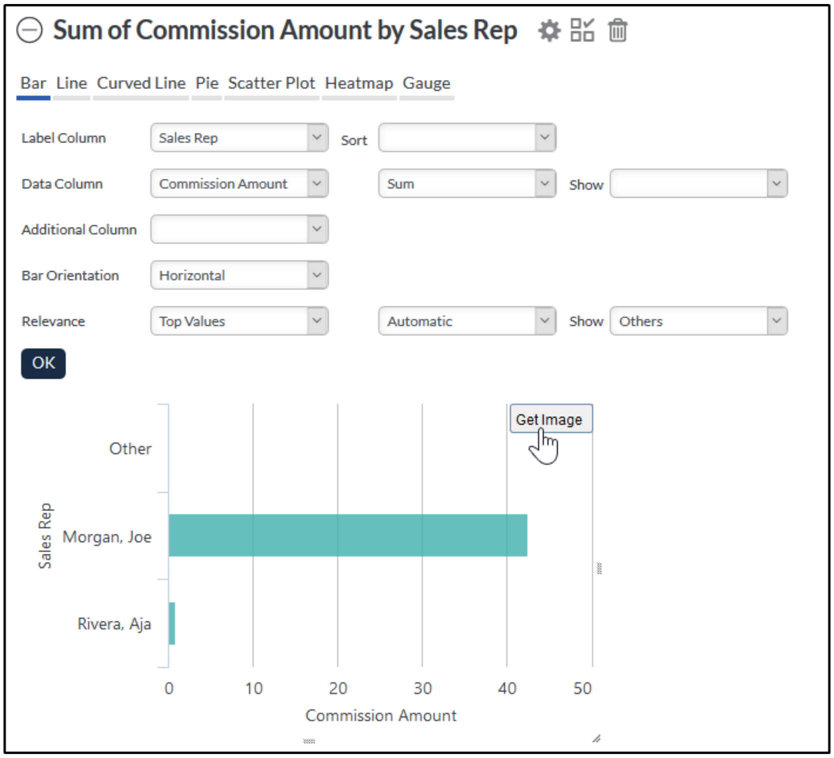
Follow these steps to add a chart:

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.


Sum of Commission Amount by Sales Rep
Bar
Line
Curved Line
Pie
Scatter Plot
Heatmap
Gauge
Label Column
Sales Rep
Sort
Data Column
Commission Amount
Sum
Show
Additional Column
Bar Orientation
Horizontal
Relevance
Top Values
Automatic
Show
Others
OK
Get Image
Other
Morgan, Joe
Rivera, Aja
Sales Rep
0
10
20
30
40
50
Commission Amount

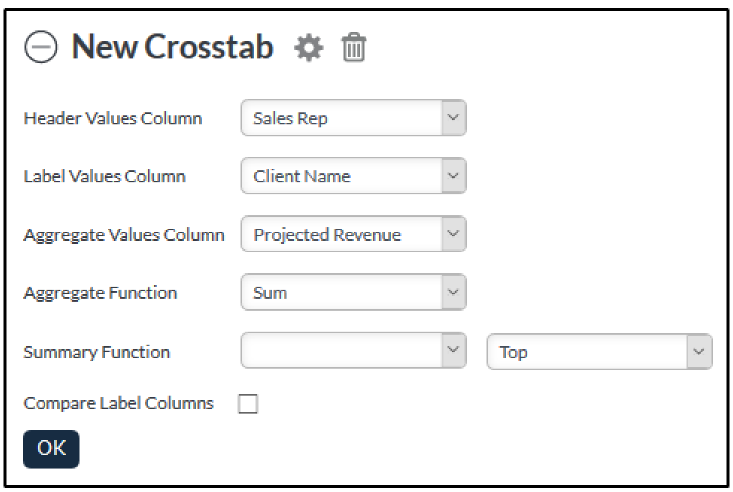
Add a Crosstab to an Analysis Table

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.



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

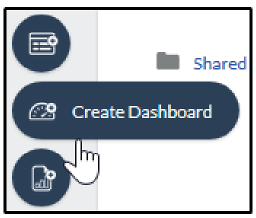
6. Select a **Summary Function** to display a summary result.
7. Check **the Compare Label Columns** check box to cause the difference between column values to be displayed, along with a cell shading indicator.
8. Click **OK**. This will generate the crosstab table in its own panel; otherwise, the table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

Create a Custom Dashboard

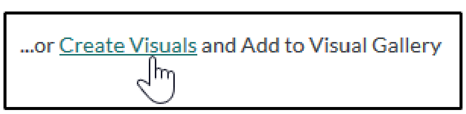
A dashboard is a collection of visuals (charts, gauges, and tables) that are placed into *dashboard panels*.

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.



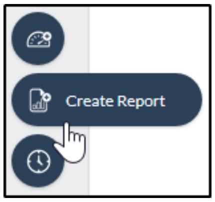
5. Click **Done** to close the Visual Gallery.
6. Click on **Untitled Dashboard** and type the name of the dashboard in the **Name** field. This name appears on the Report Center home page.
7. Click the gear icon on the “New” Tab at the top left and click **Rename Tab**, and then type a name for the 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.

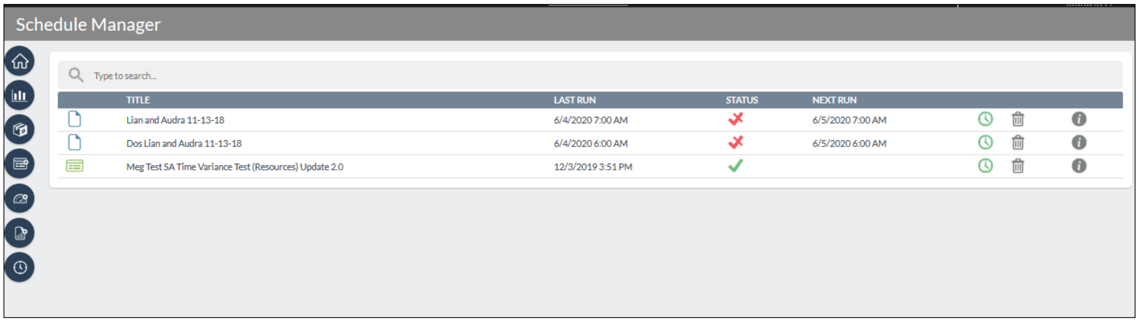
5. Rearrange components on the canvas by clicking their drag icon " " and dragging them to a new location.
6. Configure the component settings or delete them by clicking the gear or X icons.
7. Add or remove columns for the Split Row component by clicking the columns icon.

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.

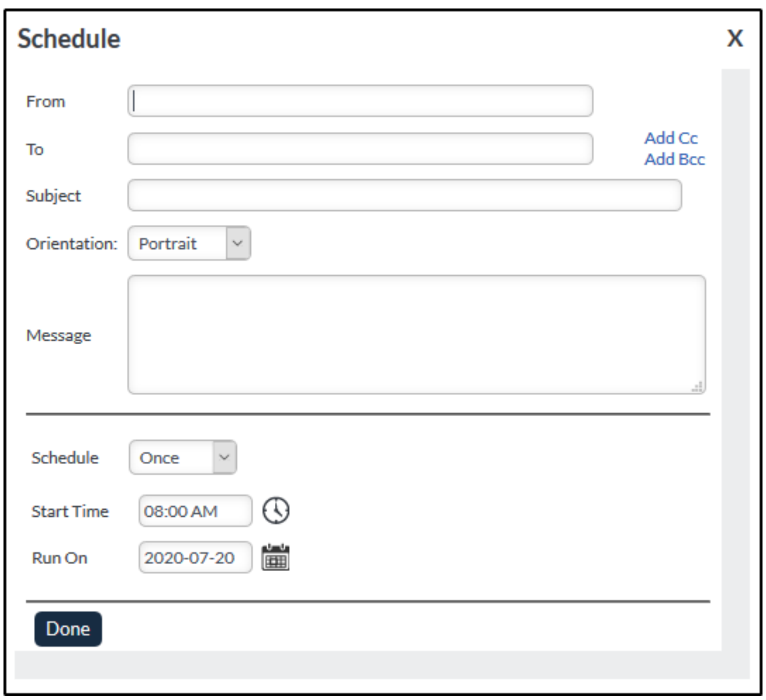
Schedule a Report for Delivery (Pro Plus Feature)

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



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.



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. - *If weekly*, type in how often and which days to send out the reports. - *If monthly*, 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.

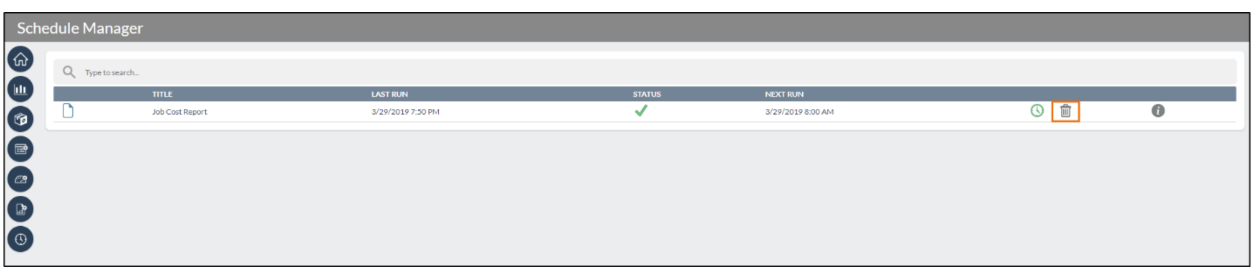
Click here for a how-to video on sharing reports.

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.



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 > SA Reports.**

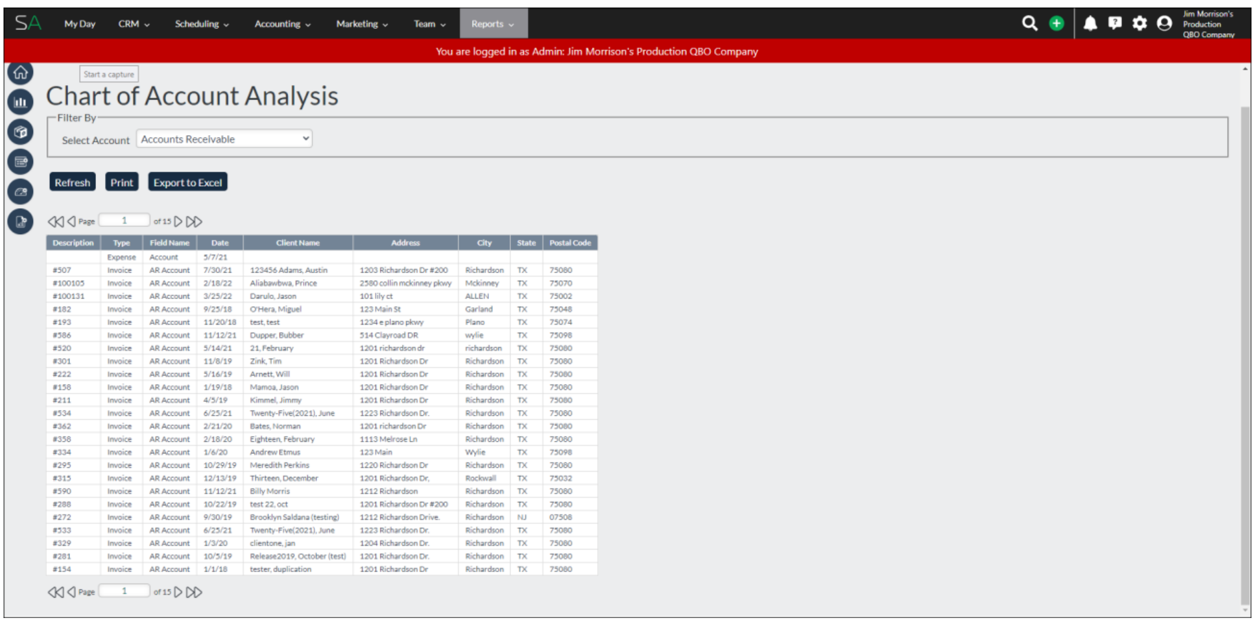
Audit Reports

Chart of Accounts Analysis (QBO Only)

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

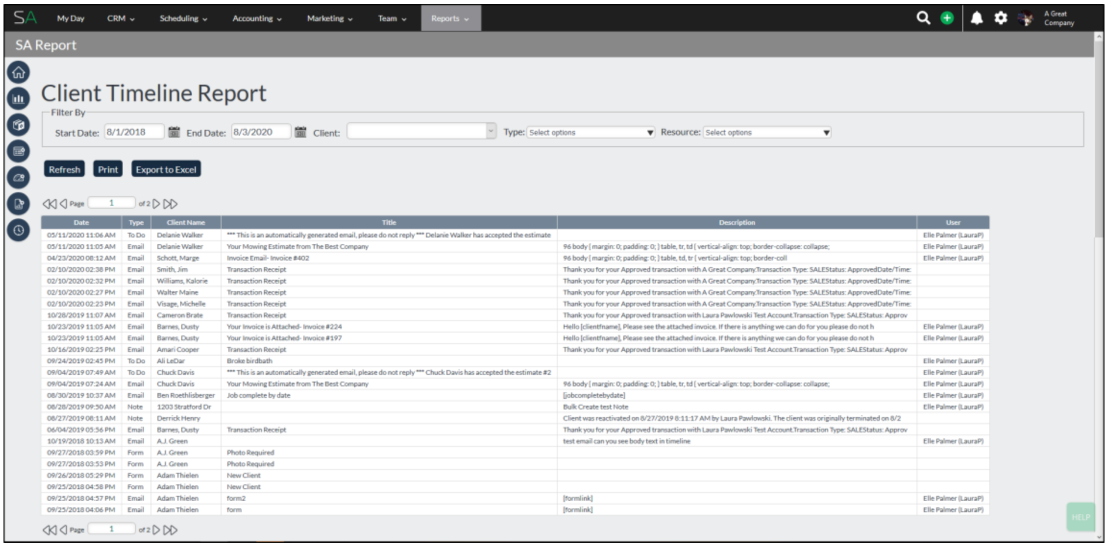
The data it shows depends on the kind of account. The report displays every item in the system that's tied to that account.

You can filter by the type of Account.



Client Timeline Report

This report shows all client timeline entries within a date range you select. You can also filter by client, type (such as calls and Tickets), and resource to narrow the results.



Description

Date Date of the event

Type Type of event, such as “Email.”

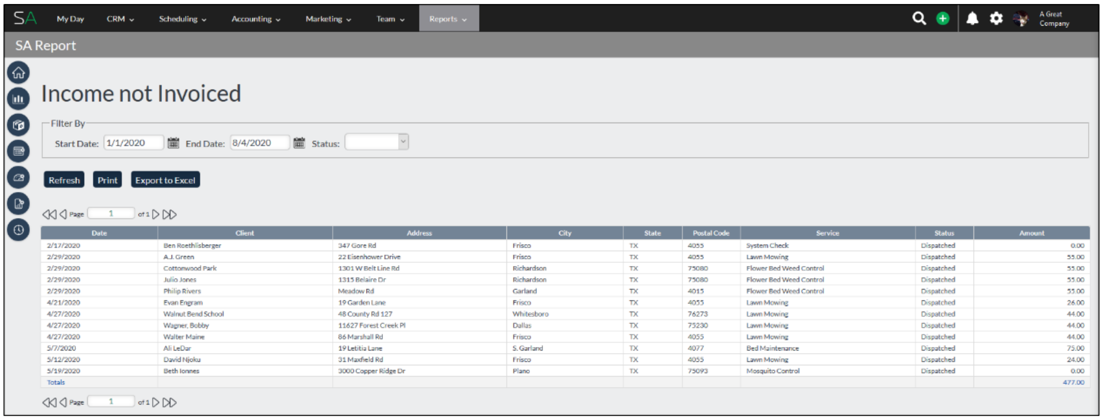
Client Name The name on the Account where the event took place.

Title Any description of the event. For emails, this will be the opening text of the email.

Amount Pre-taxed amount for the service or visit; this does not include product rates.

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.



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 Eisenhower Drive	Frisco	TX	4055	Lawn Mowing	Dispatched	55.00
2/29/2020	Cottonwood Park	1301 W Belt Line Rd	Richardson	TX	75080	Flower Bed Weed Control	Dispatched	55.00
2/29/2020	Julio Jones	1315 Belaire Dr	Richardson	TX	75080	Flower Bed Weed Control	Dispatched	55.00
2/29/2020	Philip Rivers	Meadow Rd	Garland	TX	4015	Flower Bed Weed Control	Dispatched	55.00
4/21/2020	Evan Engram	19 Garden Lane	Frisco	TX	4055	Lawn Mowing	Dispatched	26.00
4/27/2020	Walnut Bend School	48 County Rd 127	Whitesboro	TX	76273	Lawn Mowing	Dispatched	44.00
4/27/2020	Wagner, Bobby	11627 Forest Creek Pl	Dallas	TX	75230	Lawn Mowing	Dispatched	44.00
4/27/2020	Walter Maine	86 Marshall Rd	Frisco	TX	4055	Lawn Mowing	Dispatched	44.00
5/7/2020	Ali LeDar	19 Letitia Lane	S. Garland	TX	4077	Bed Maintenance	Dispatched	75.00
5/12/2020	David Njoku	31 Maxfield Rd	Frisco	TX	4055	Lawn Mowing	Dispatched	24.00
5/19/2020	Beth Ionnes	3000 Copper Ridge Dr	Plano	TX	75093	Mosquito 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

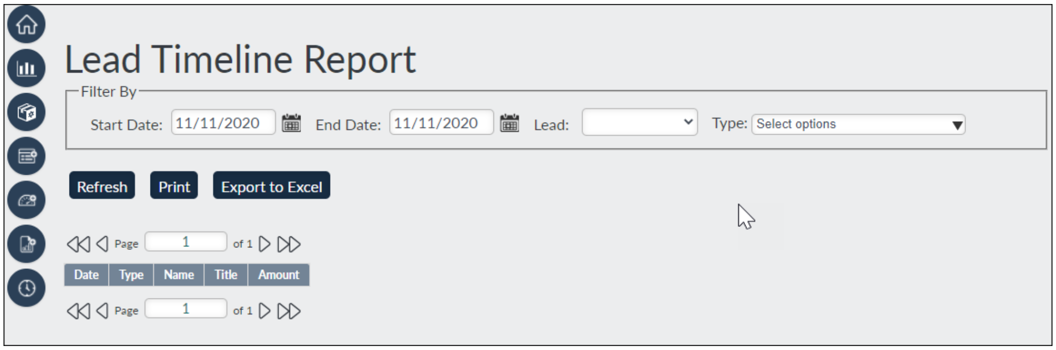
Service Visit or service performed

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.



Description

Date Date of the event

Type Type of event, such as “Email.”

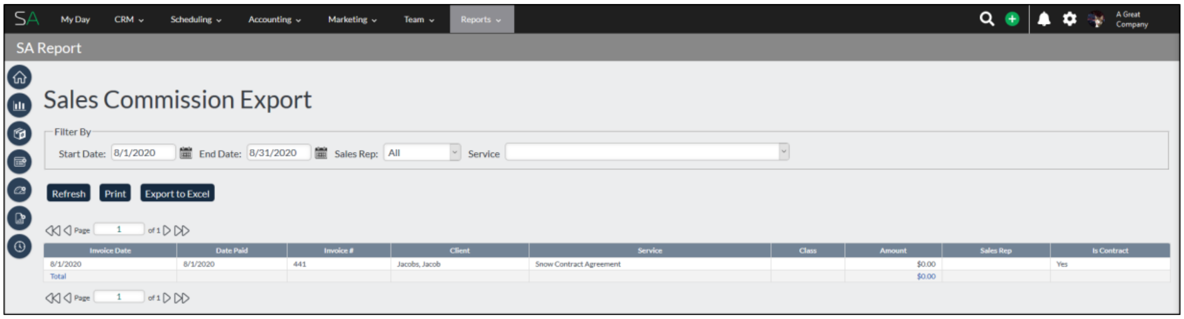
Client Name The name on the Account where the event took place.

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.



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

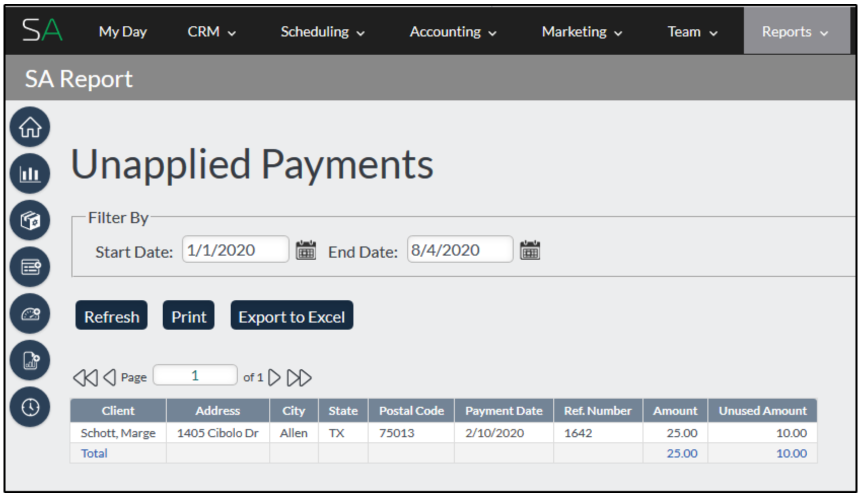
Is Contract whether the Visit is billed to an Installment Plan

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.



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

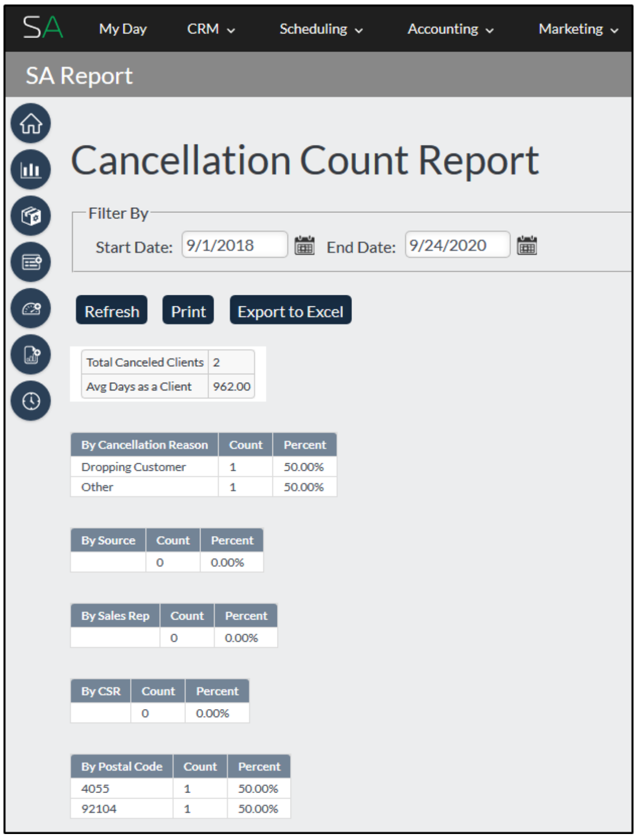
Amount Amount of payment

Unused Amount Amount of unused (over) payment

Client Reports

Cancellation Count Report

Shows how many cancellations occurred in a selected time frame.

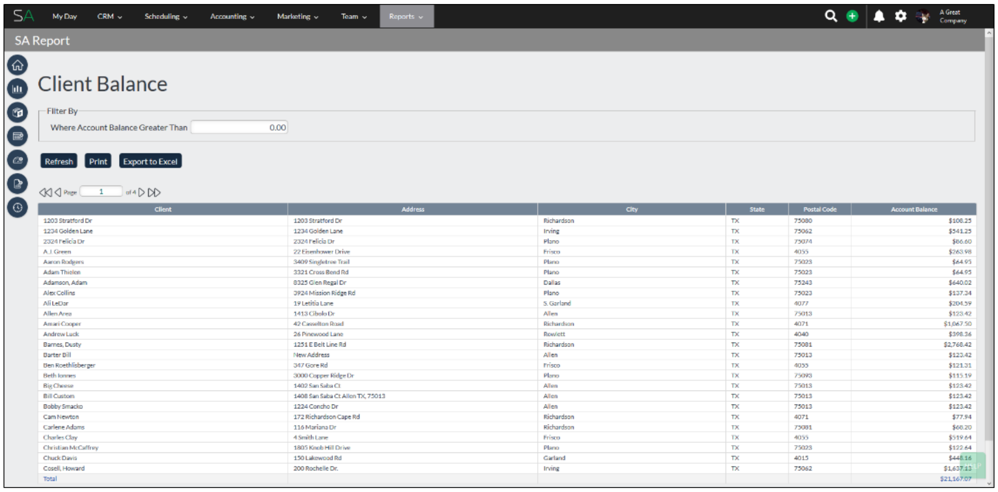


Description

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.



Client	Address	City	State	Postal Code	Account Balance
1203 Stratford Dr	1203 Stratford Dr	Richardson	TX	75080	$108.25
1234 Golden Lane	1234 Golden Lane	Irving	TX	75062	$541.25
2324 Felicia Dr	2324 Felicia Dr	Plano	TX	75074	$86.60
A.J. Green	22 Eisenhower Drive	Frisco	TX	4055	$263.98
Aaron Rodgers	3409 Singletree Trail	Plano	TX	75023	$64.95
Adam Thielen	3321 Cross Bend Rd	Plano	TX	75023	$64.95
Adamson, Adam	8325 Glen Regal Dr	Dallas	TX	75243	$640.02
Alex Collins	3924 Mission Ridge Rd	Plano	TX	75023	$137.34
Ali LeDar	19 Letitia Lane	S. Garland	TX	4077	$204.59
Allen Area	1413 Cibolo Dr	Allen	TX	75013	$123.42
Amari Cooper	42 Casselton Road	Richardson	TX	4071	$1,067.50
Andrew Luck	26 Pinewood Lane	Rowlett	TX	4040	$398.36
Barnes, Dusty	1251 E Belt Line Rd	Richardson	TX	75081	$2,768.42
Barter Bill	New Address	Allen	TX	75013	$123.42
Ben Roethlisberger	347 Gore Rd	Frisco	TX	4055	$121.31
Beth Iommes	3000 Copper Ridge Dr	Plano	TX	75093	$115.19
Big Cheese	1402 San Saba Ct	Allen	TX	75013	$123.42
Bill Custom	1408 San Saba Ct Allen TX, 75013	Allen	TX	75013	$123.42
Bobby Smacko	1224 Concho Dr	Allen	TX	75013	$123.42
Cam Newton	172 Richardson Cape Rd	Richardson	TX	4071	$77.94
Carlene Adams	116 Mariana Dr	Richardson	TX	75081	$66.20
Charles Clay	4 Smith Lane	Frisco	TX	4055	$519.64
Christian McCaffrey	1805 Knob Hill Drive	Plano	TX	75023	$122.64
Chuck Davis	150 Lakewood Rd	Garland	TX	4015	$448.16
Cosell, Howard	200 Rochelle Dr.	Irving	TX	75062	$1,637.13
Total					$21,167.07

Description

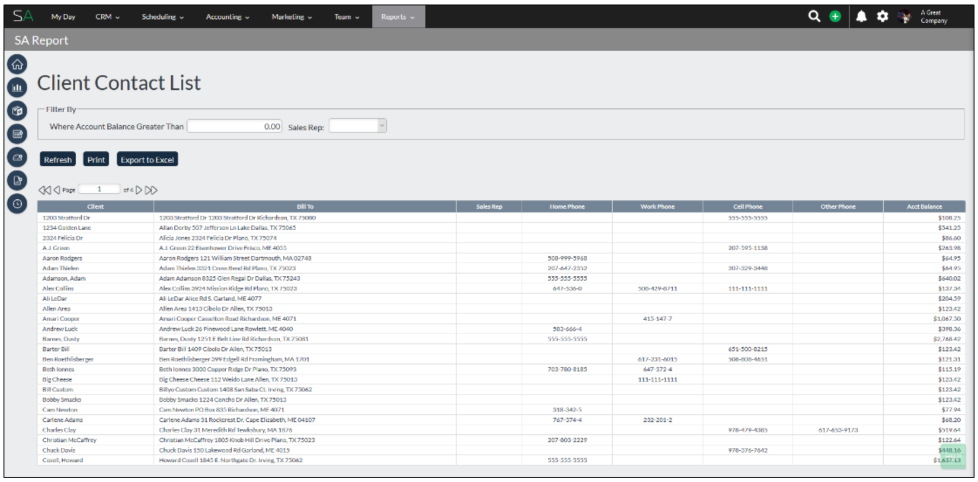
Client Client name

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.



Description

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

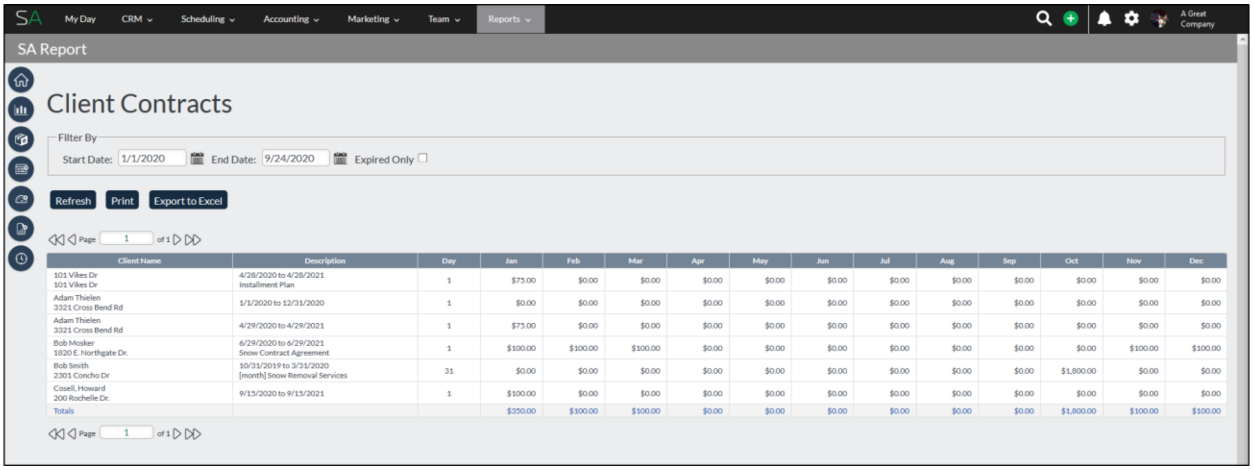
Client Client name

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 Vikes Dr 101 Vikes Dr	4/28/2020 to 4/28/2021 Installment 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 Mosker 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 2301 Concho 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

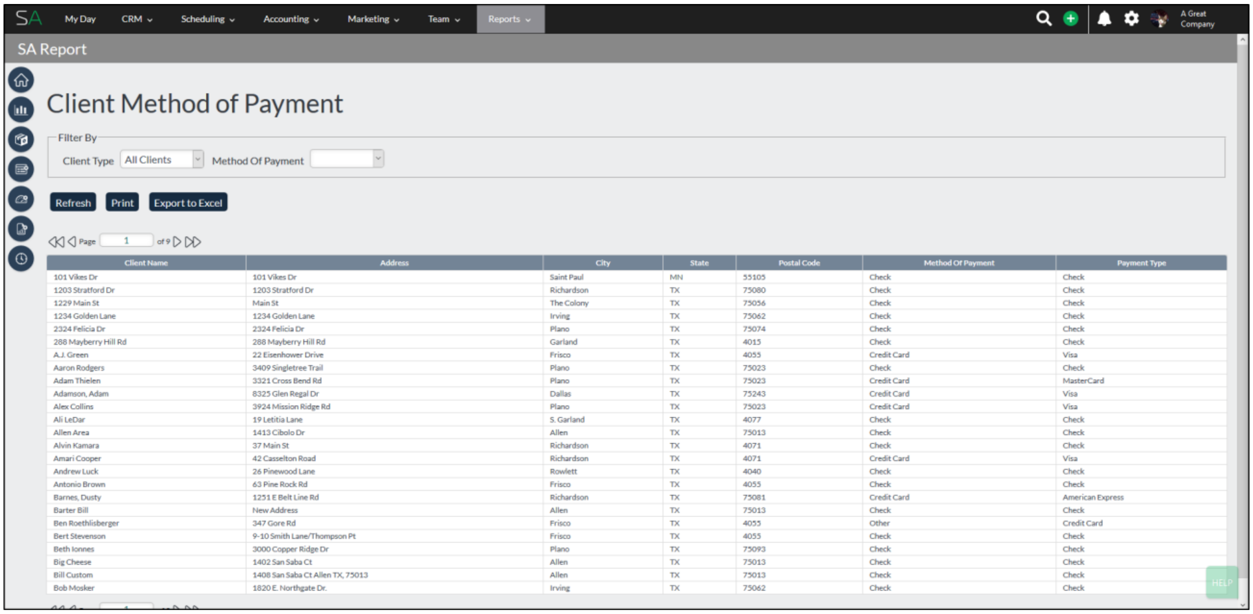
Day Date invoices are created

(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:



Client Name	Address	City	State	Postal Code	Method Of Payment	Payment Type
101 Vikes Dr	101 Vikes 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 Thielen	3321 Cross Bend Rd	Plano	TX	75023	Credit Card	MasterCard
Adamson, Adam	8325 Glen Regal Dr	Dallas	TX	75243	Credit Card	Visa
Alex Collins	3924 Mission Ridge Rd	Plano	TX	75023	Credit Card	Visa
Ali LeDar	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 Casselton 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 Roethlisberger	347 Gore Rd	Frisco	TX	4055	Other	Credit Card
Bert Stevenson	9-10 Smith Lane/Thompson Pt	Frisco	TX	4055	Check	Check
Beth Ionnes	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 Mosker	1820 E. Northgate Dr.	Irving	TX	75062	Check	Check

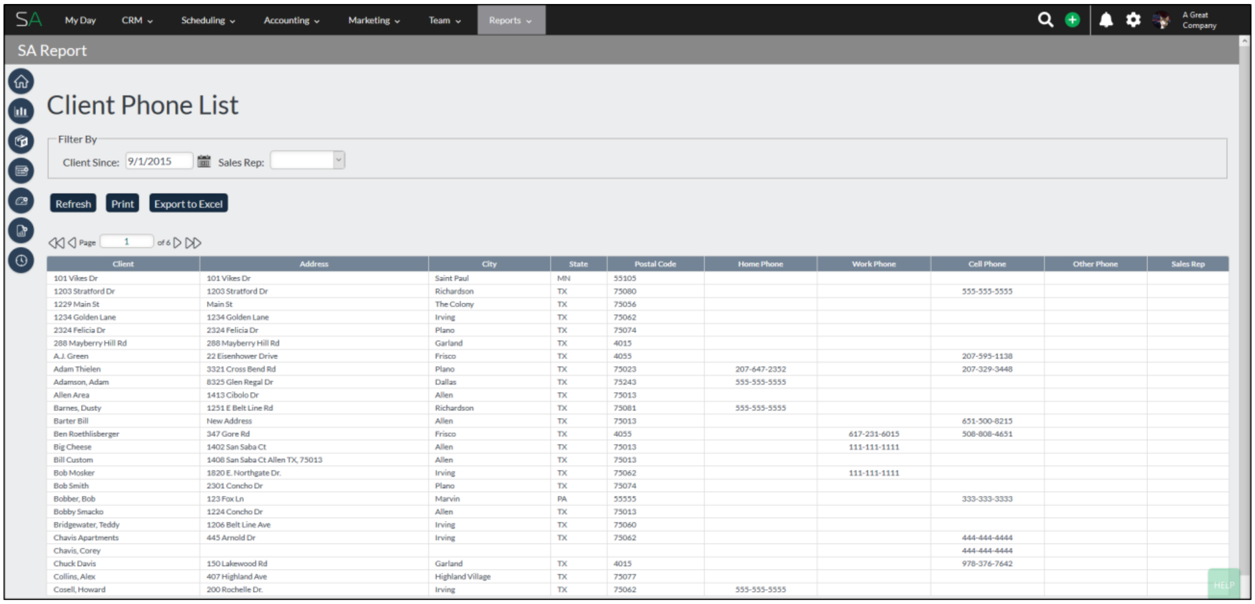
Description

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

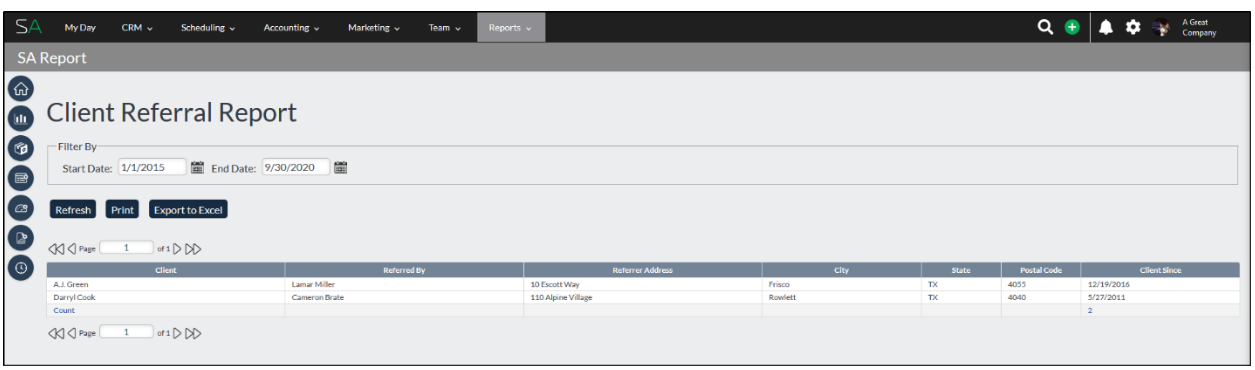
A list of clients and their contact information based on a "client since" date. You also can filter by Sales Rep.



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**).



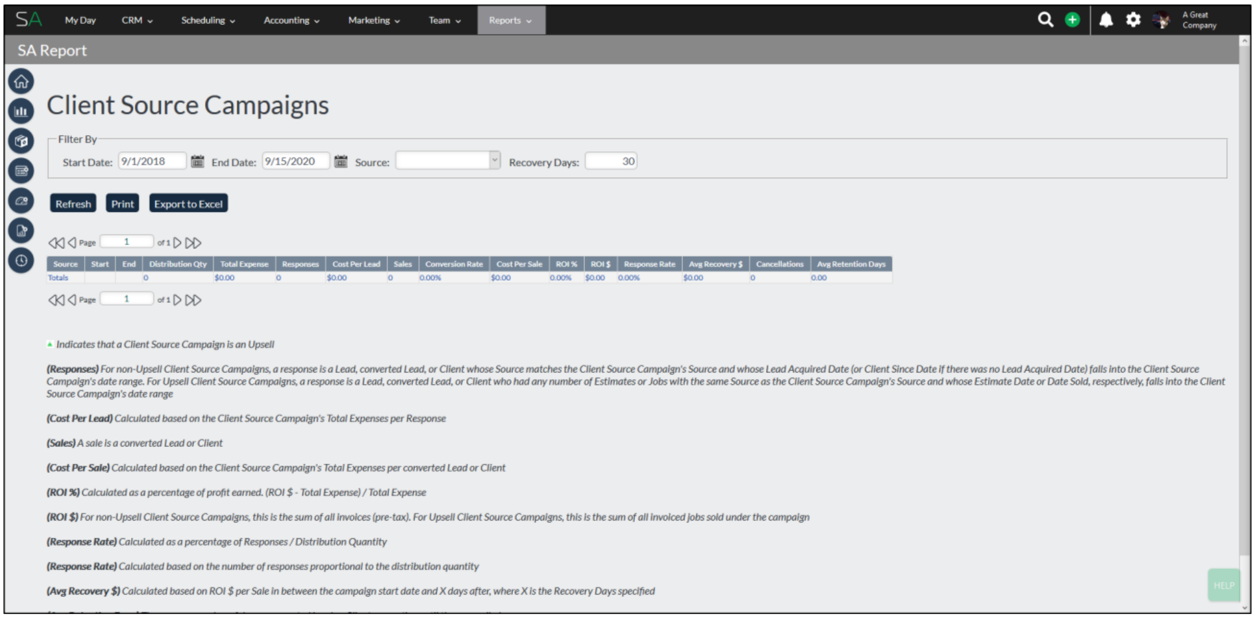
Description

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**.



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.

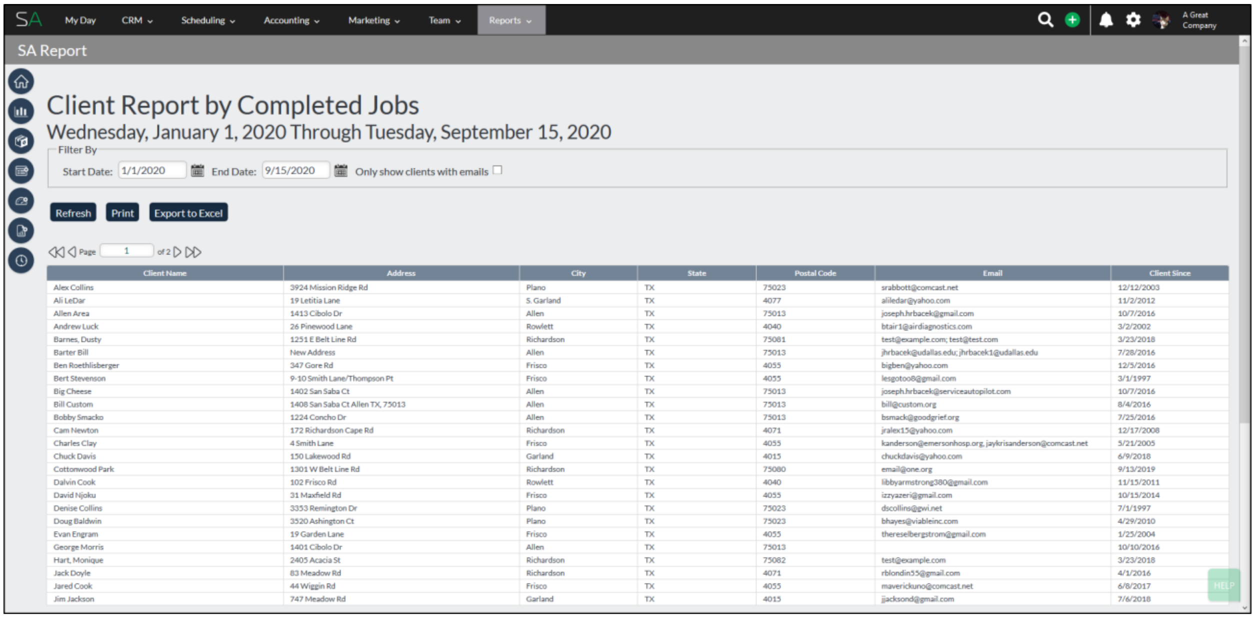
Description

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 $ Total Expense) / 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, Responses / 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.



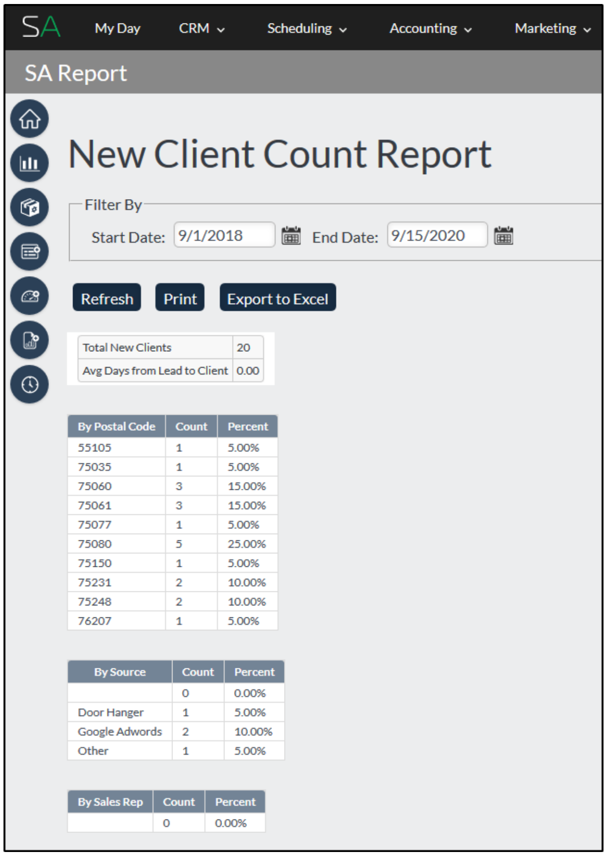
Description

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.

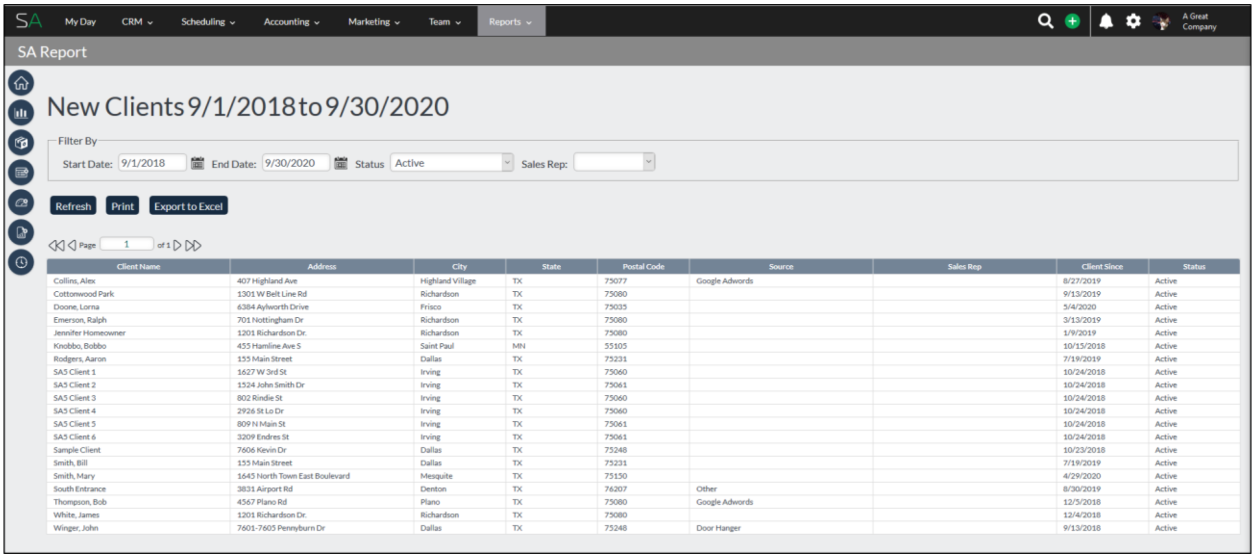


Description

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.



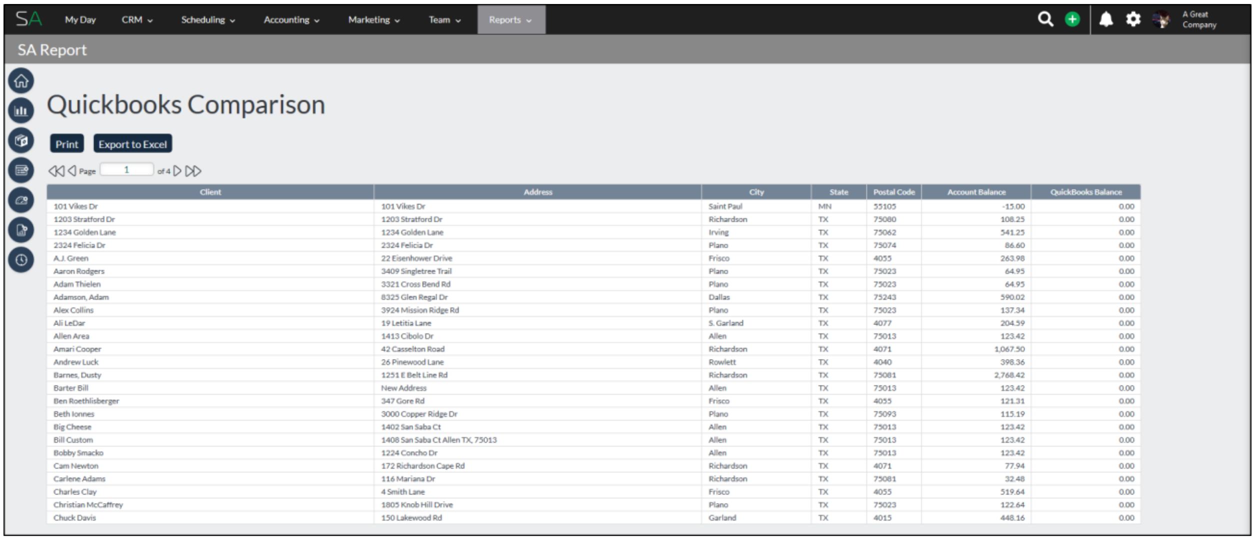
Client Name	Address	City	State	Postal Code	Source	Sales Rep	Client Since	Status
Collins, Alex	407 Highland Ave	Highland Village	TX	75077	Google Adwords		8/27/2019	Active
Cottonwood Park	1301 W Belt Line Rd	Richardson	TX	75080			9/13/2019	Active
Doone, Lorna	6384 Aylworth Drive	Frisco	TX	75035			5/4/2020	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, Bobbo	455 Hamline Ave S	Saint Paul	MN	55105			10/15/2018	Active
Rodgers, Aaron	155 Main Street	Dallas	TX	75231			7/19/2019	Active
SA5 Client 1	1627 W 3rd St	Irving	TX	75060			10/24/2018	Active
SA5 Client 2	1524 John Smith Dr	Irving	TX	75061			10/24/2018	Active
SA5 Client 3	802 Rindie St	Irving	TX	75060			10/24/2018	Active
SA5 Client 4	2926 St Lo Dr	Irving	TX	75060			10/24/2018	Active
SA5 Client 5	809 N Main St	Irving	TX	75061			10/24/2018	Active
SA5 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	108.25	0.00
1234 Golden Lane	1234 Golden Lane	Irving	TX	75062	541.25	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	64.95	0.00
Adam Thielen	3321 Cross Bend Rd	Plano	TX	75023	64.95	0.00
Adamson, Adam	8325 Glen Regal Dr	Dallas	TX	75243	590.02	0.00
Alex Collins	3924 Mission Ridge Rd	Plano	TX	75023	137.34	0.00
Ali LeDar	19 Letitia Lane	S. Garland	TX	4077	204.59	0.00
Allen Area	1413 Cibolo Dr	Allen	TX	75013	123.42	0.00
Amari Cooper	42 Casselton Road	Richardson	TX	4071	1,067.50	0.00
Andrew Luck	26 Pinewood Lane	Rowlett	TX	4040	398.36	0.00
Barnes, Dusty	1251 E Belt Line Rd	Richardson	TX	75081	2,768.42	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 Ionnes	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	1224 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	122.64	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.

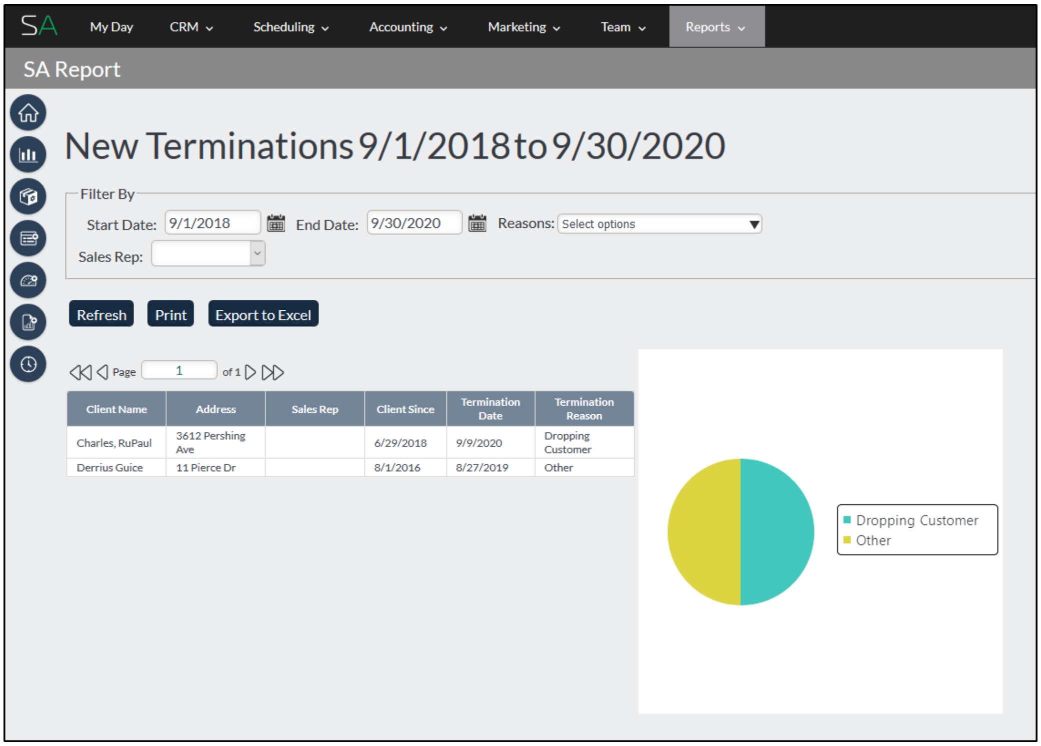
You must update this report manually: In the QuickBooks Sync Connector, click the button at the top of the window labelled **Update Balance Report**.

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.



Description

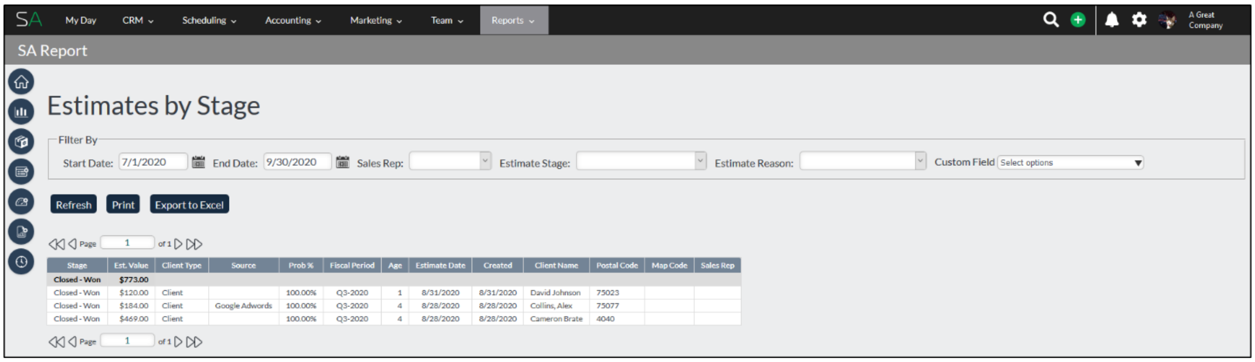
The report displays client information including the termination date and reason. The pie chart shows cancellations by reason.

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.

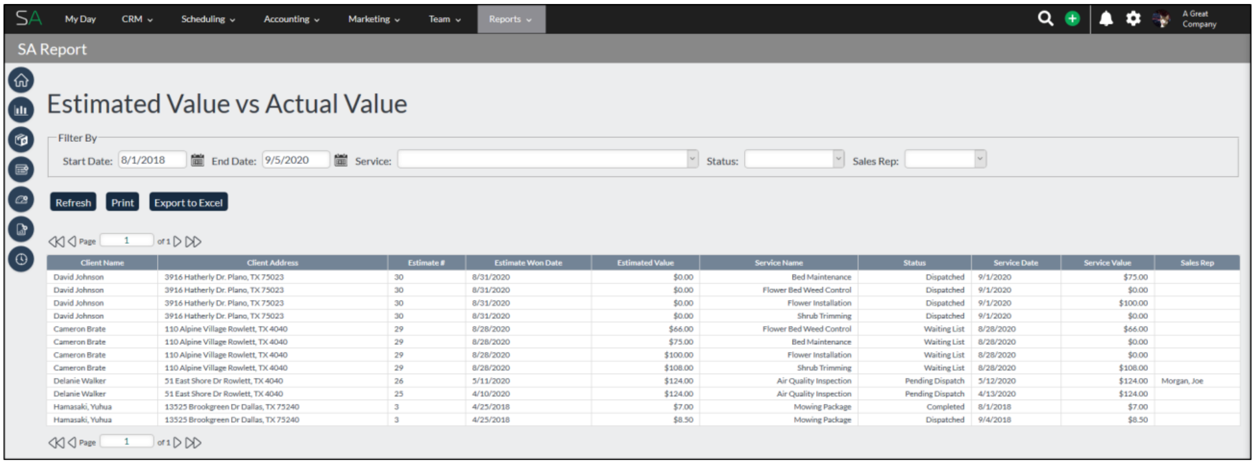


Description

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.

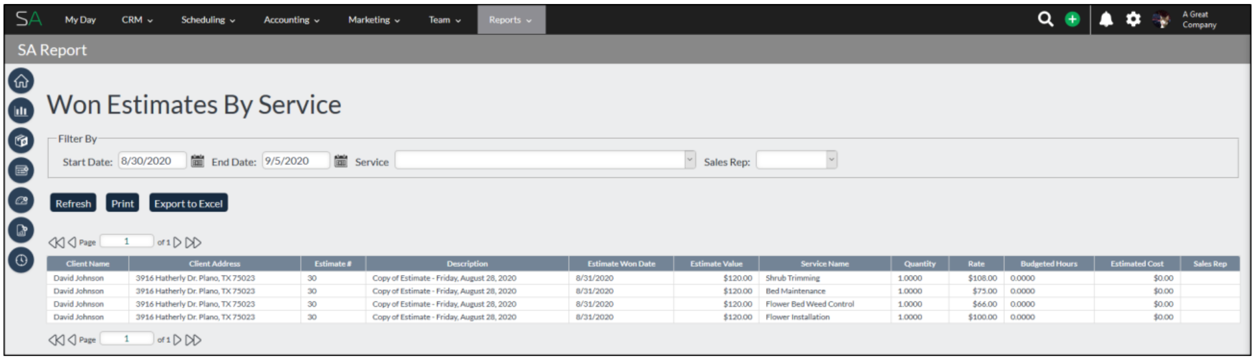


Description

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.



Description

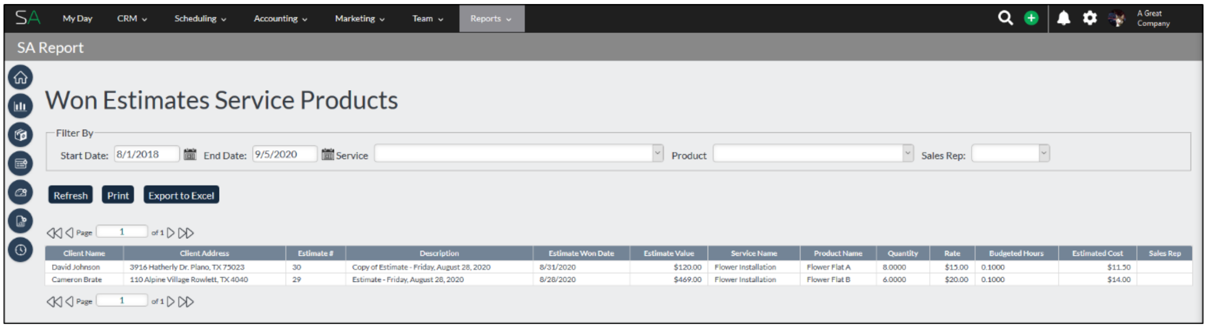
The report lists the estimate number and services.

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.



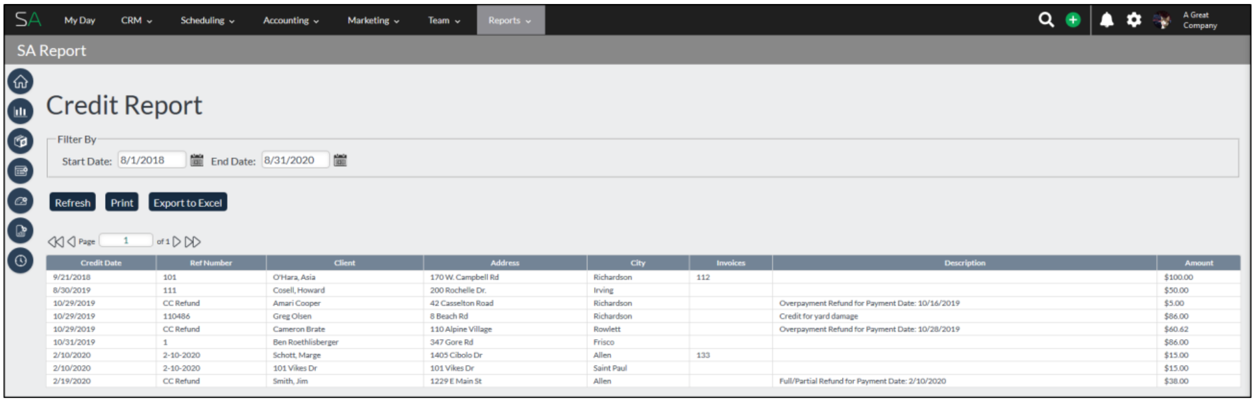
Description

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.

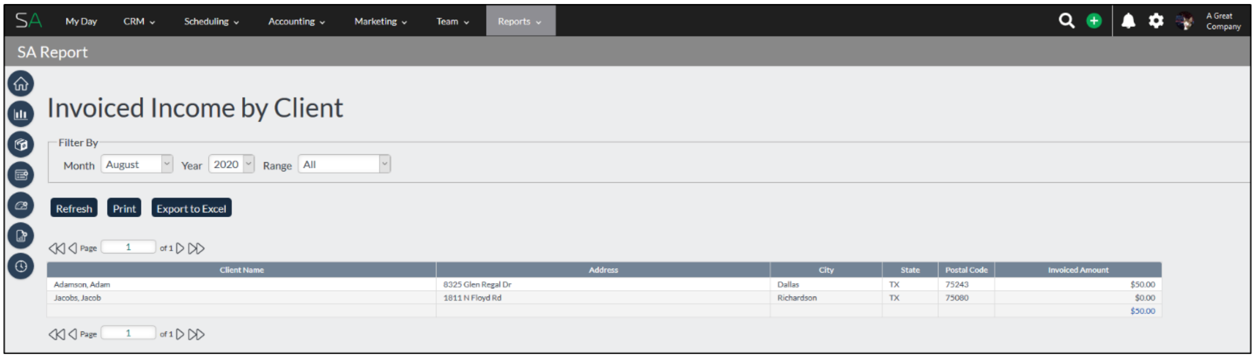


Description

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.



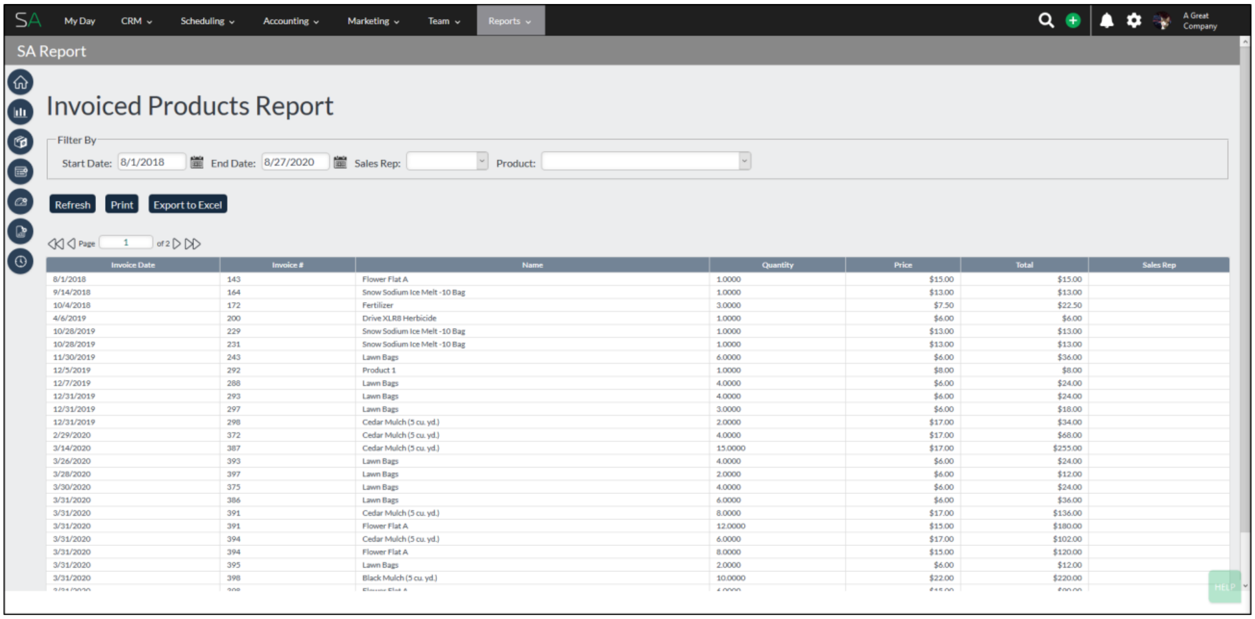
Description

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:

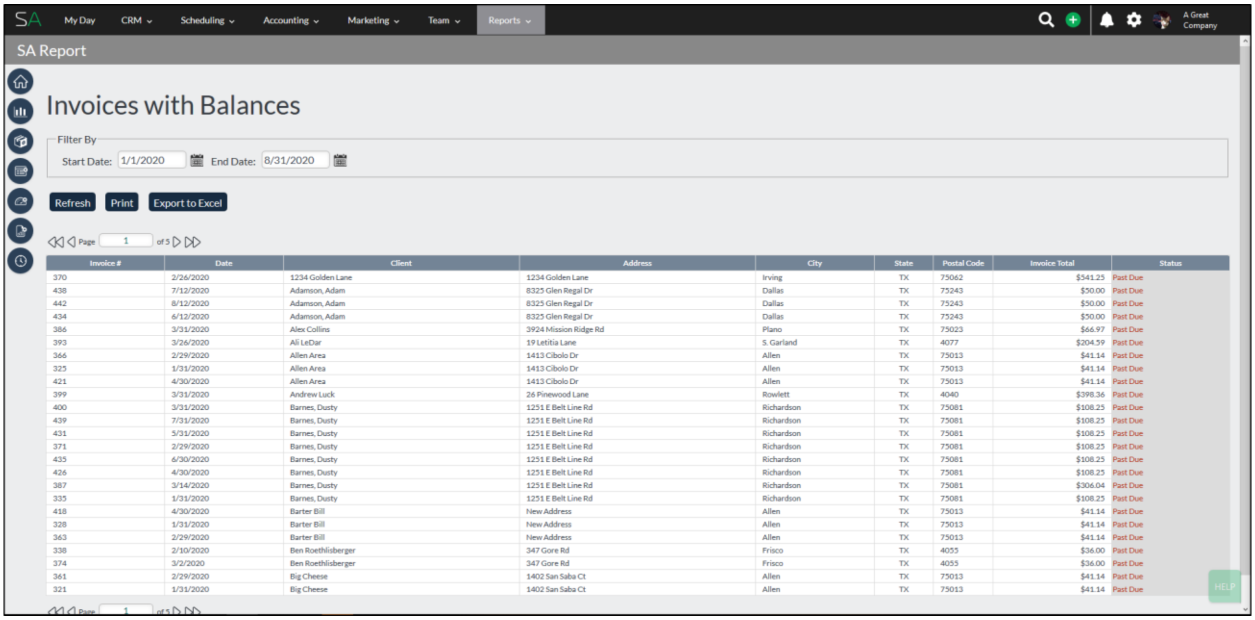


Description

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.



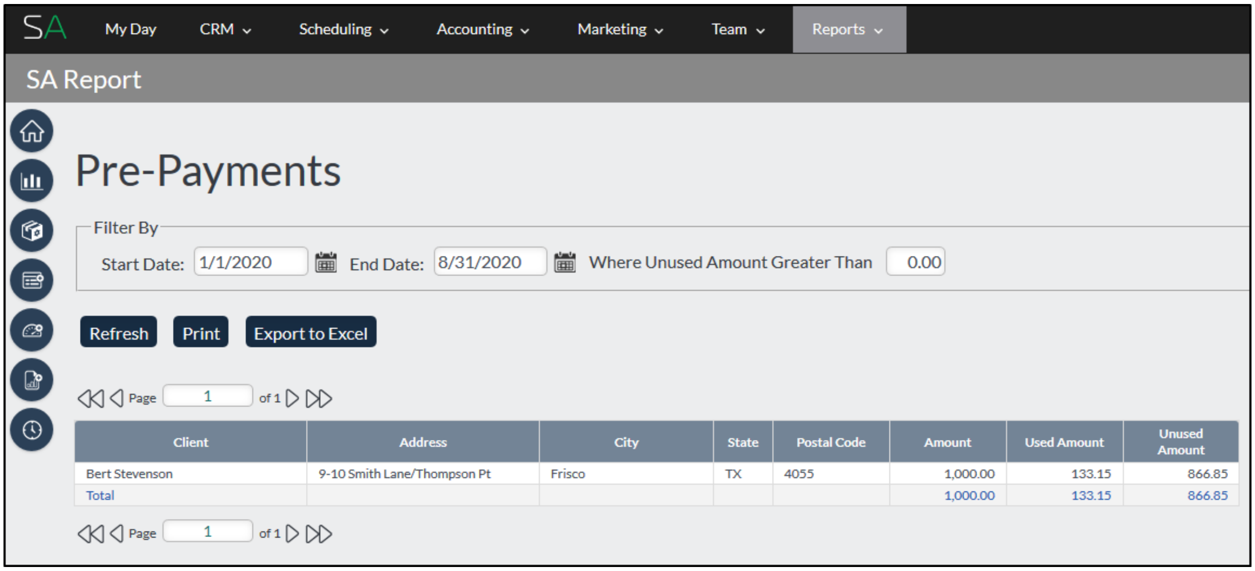
Invoice #	Date	Client	Address	City	State	Postal Code	Invoice Total	Status
370	2/26/2020	1234 Golden Lane	1234 Golden Lane	Irving	TX	75062	$541.25	Past Due
438	7/12/2020	Adamson, Adam	8325 Glen Regal Dr	Dallas	TX	75243	$50.00	Past Due
442	8/12/2020	Adamson, Adam	8325 Glen Regal Dr	Dallas	TX	75243	$50.00	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	$66.97	Past Due
393	3/26/2020	Ali LeDar	19 Letitia Lane	S. Garland	TX	4077	$204.59	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 Luck	26 Pinewood Lane	Rowlett	TX	4040	$398.36	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
435	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 Saba Ct	Allen	TX	75013	$41.14	Past Due
321	1/31/2020	Big Cheese	1402 San Saba 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.

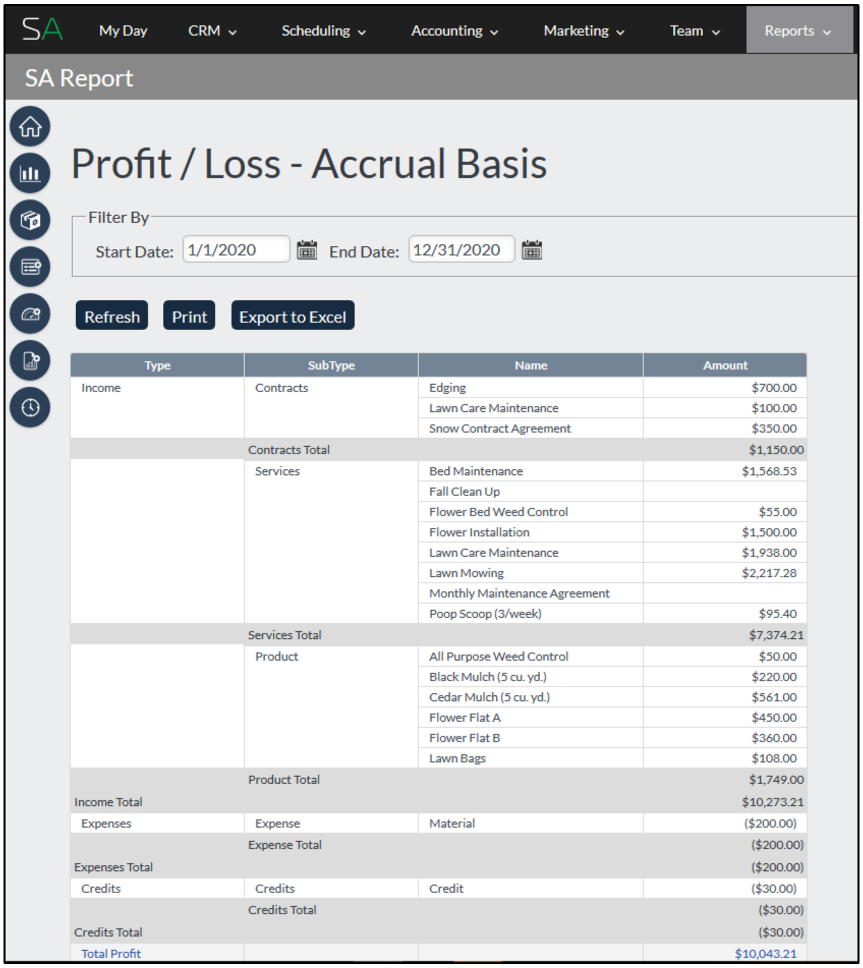


Description

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.


SA My Day CRM Scheduling Accounting Marketing Team Reports

SA Report

Profit / Loss - Accrual Basis

Filter By

Start Date: 1/1/2020 End Date: 12/31/2020

Refresh Print Export to Excel

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	$50.00
		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		($200.00)
Expenses Total			($200.00)
Credits	Credits	Credit	($30.00)
	Credits Total		($30.00)
Credits Total			($30.00)
Total Profit			$10,043.21

Description

Type The report instance type, such as "Income"

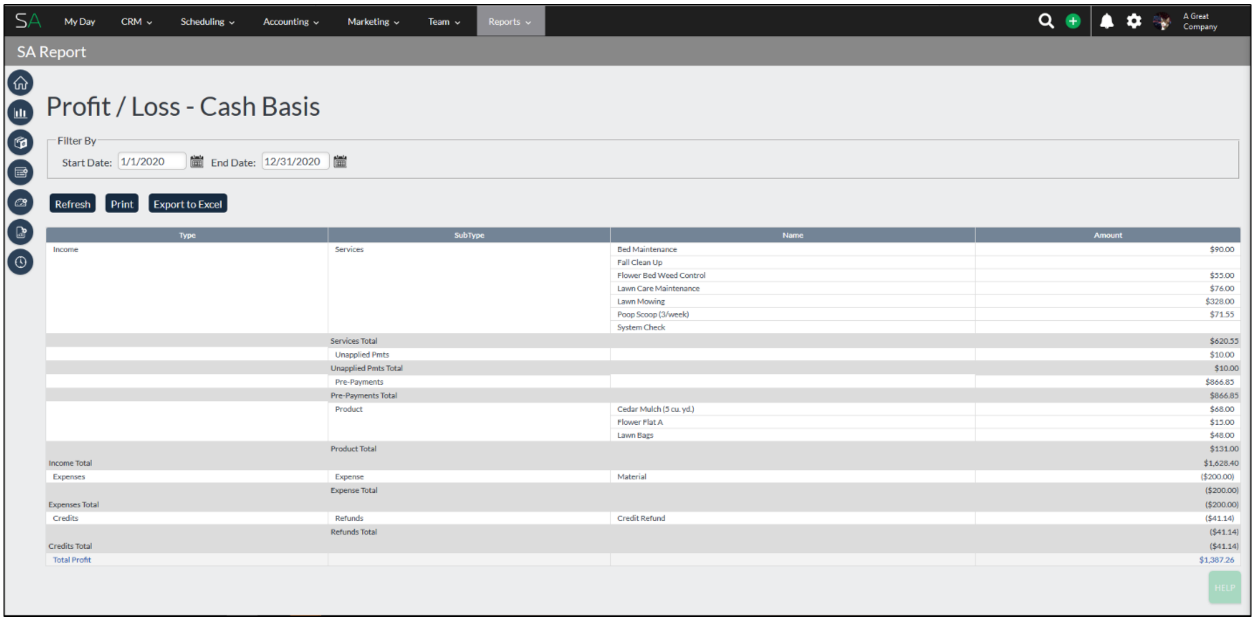
SubType The subtype as it relates to the type such as "Contracts" or "Services"

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.



Description

Type The report instance type

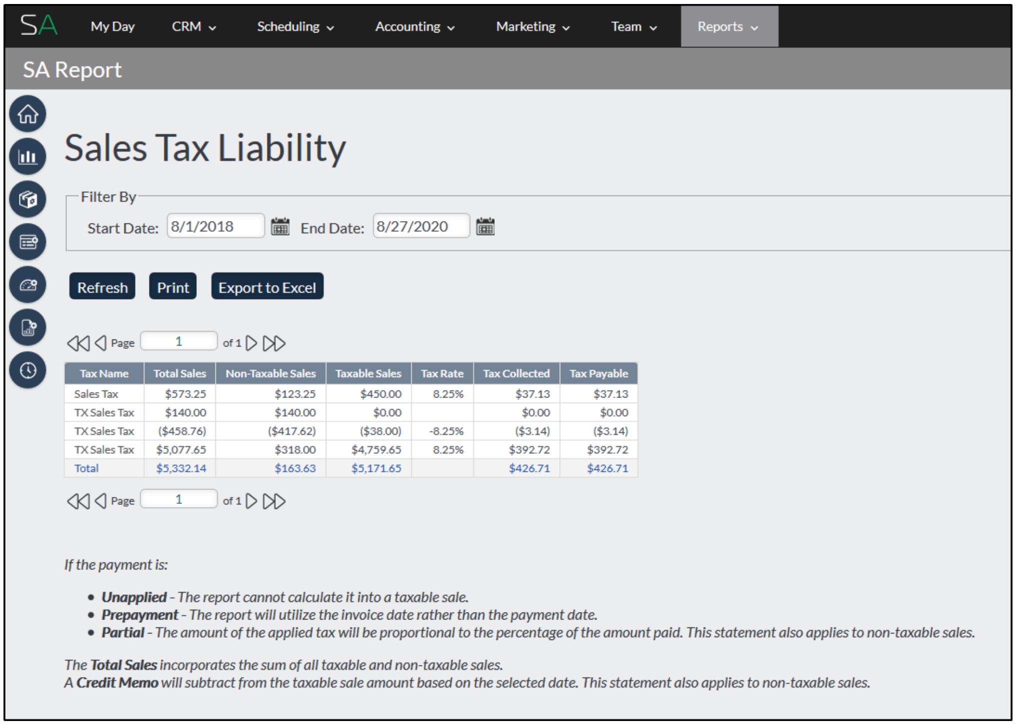
SubType The subtype as it applies to the type, such as "Contracts" or "Services"

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:



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.

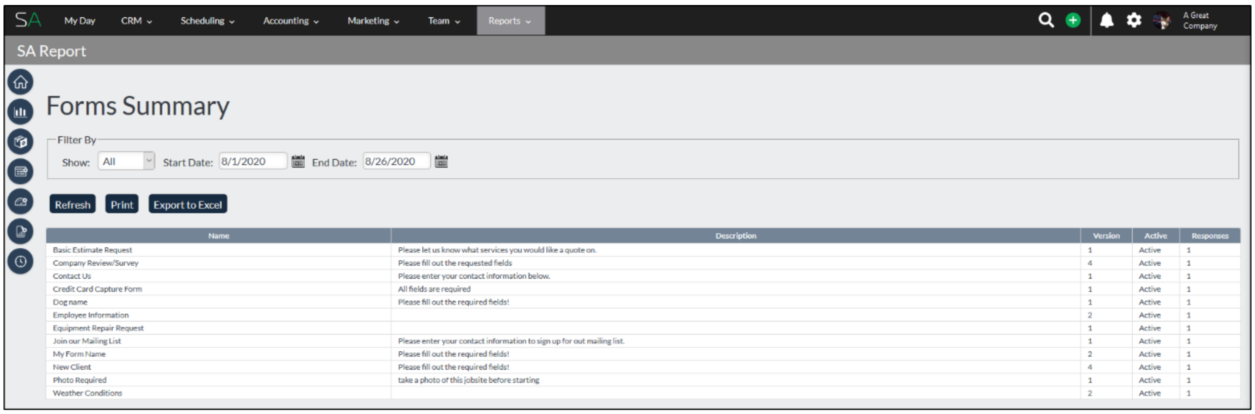
Tax Name	Sales tax name
Total Sales	Total of sales for each tax reference (taxable and non-taxable)
Non-Taxable Sales	Total of sales that were non-taxable
Taxable Sales	Total of sales that were taxable
Tax Rate	Tax rate
Tax Collected	Tax collected, based on total taxed amount on invoices
Tax Payable	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.



Description

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

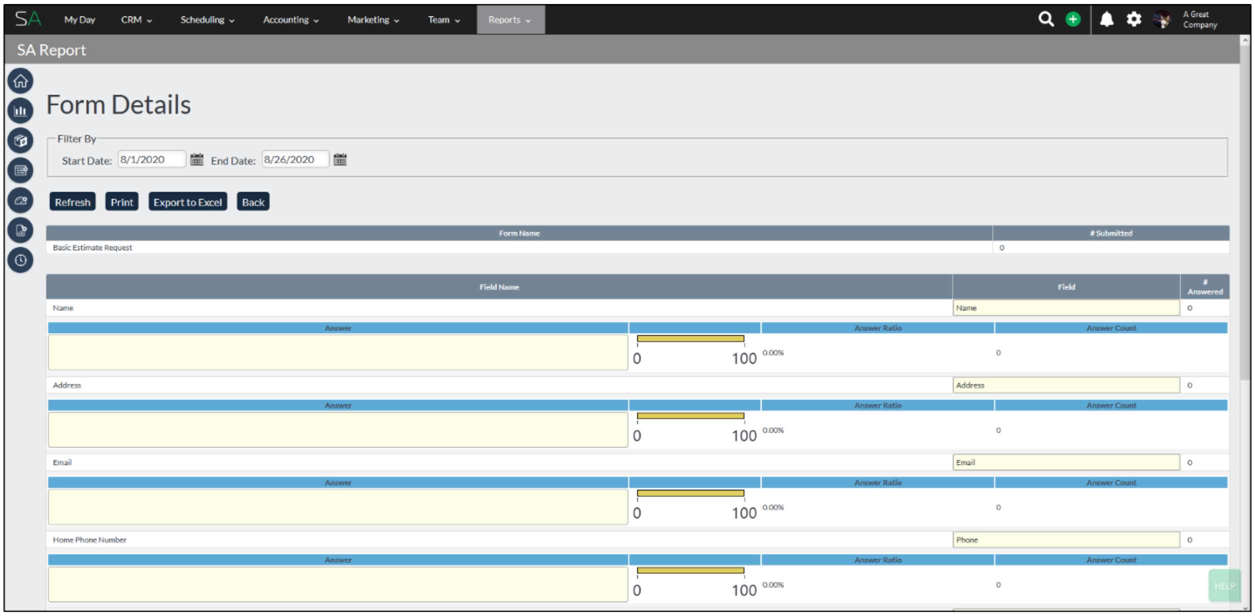
Name Name (not title) and description of form – click the name to open detailed view of each report and its metrics

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.



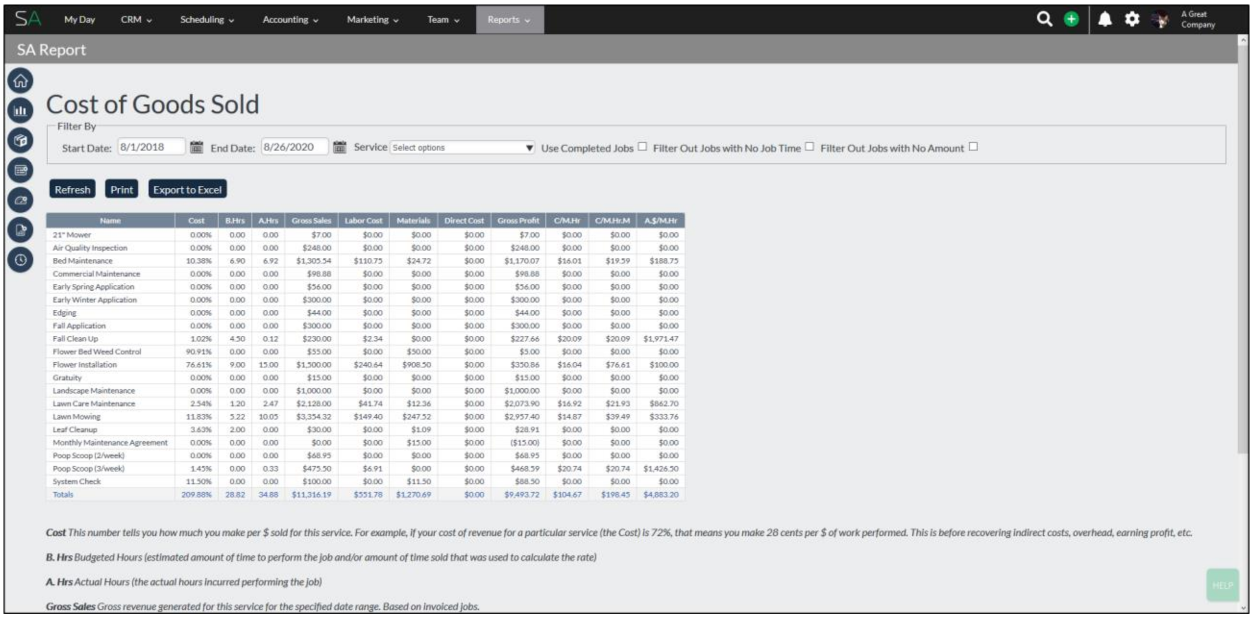
If your question did not have a standardized answer, click to expand the answers and see a list of each response.

- 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.



Cost of Goods Sold

Filter By

Start Date: 8/1/2018 End Date: 8/26/2020 Service Select options Use Completed Jobs Filter Out Jobs with No Job Time Filter Out Jobs with No Amount

Refresh Print Export to Excel

Name	Cost	B.Hrs	A.Hrs	Gross Sales	Labor Cost	Materials	Direct Cost	Gross Profit	C/M.Hr	C/M.Hr.M	A.$/M.Hr
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	15.00	$1,500.00	$240.64	$908.50	$0.00	$350.86	$16.04	$76.61	$100.00
Gratuity	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	$2,128.00	$41.74	$12.36	$0.00	$2,073.90	$16.92	$21.93	$862.70
Lawn Mowing	11.83%	5.22	10.05	$3,354.32	$149.40	$247.52	$0.00	$2,957.40	$14.87	$39.49	$333.76
Leaf Cleanup	3.63%	2.00	0.00	$30.00	$0.00	$1.09	$0.00	$28.91	$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	11.50%	0.00	0.00	$100.00	$0.00	$11.50	$0.00	$88.50	$0.00	$0.00	$0.00
Totals	209.88%	28.82	34.88	$11,316.19	$551.78	$1,270.69	$0.00	$9,493.72	$104.67	$198.45	$4,883.20

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.

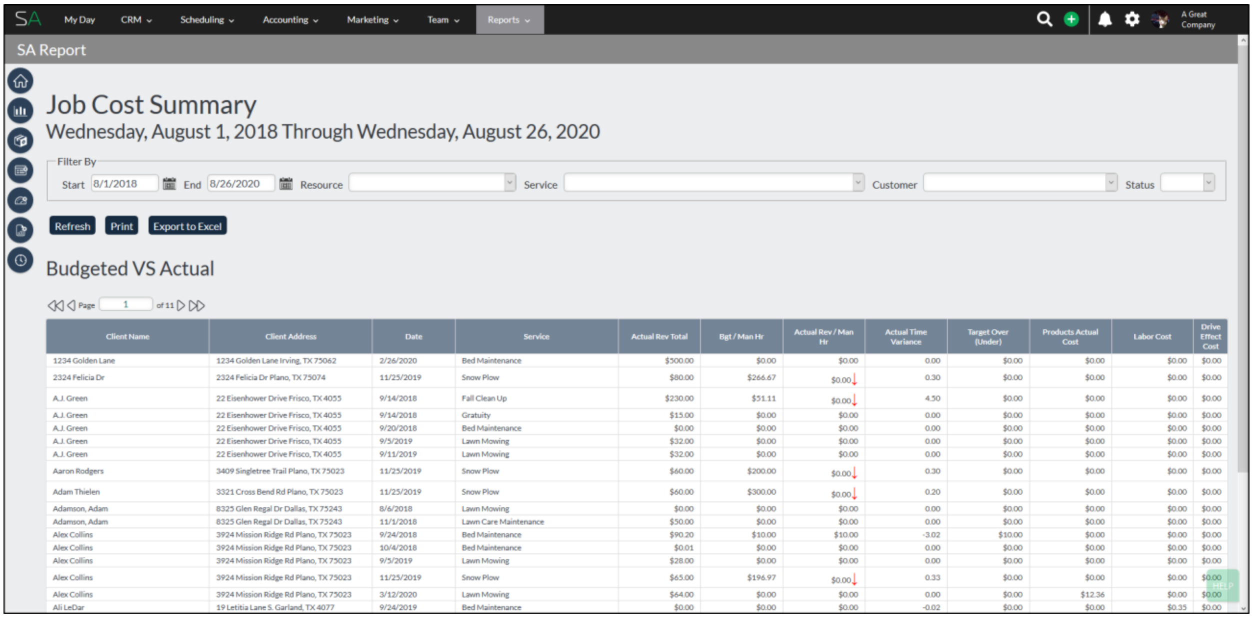
Gross Sales — the gross revenue generated for the Service for the specified date range. This is based on the invoiced amount for the Service (excluding Products).

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 minutes 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.



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.

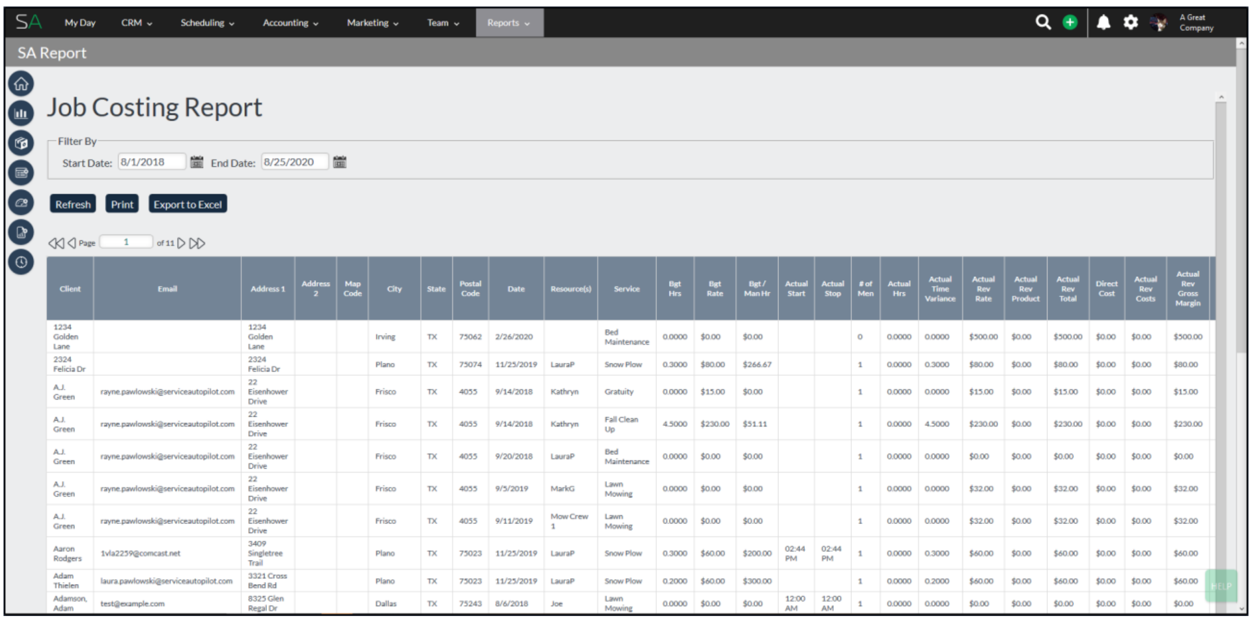
Job Costing Report

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.



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.**

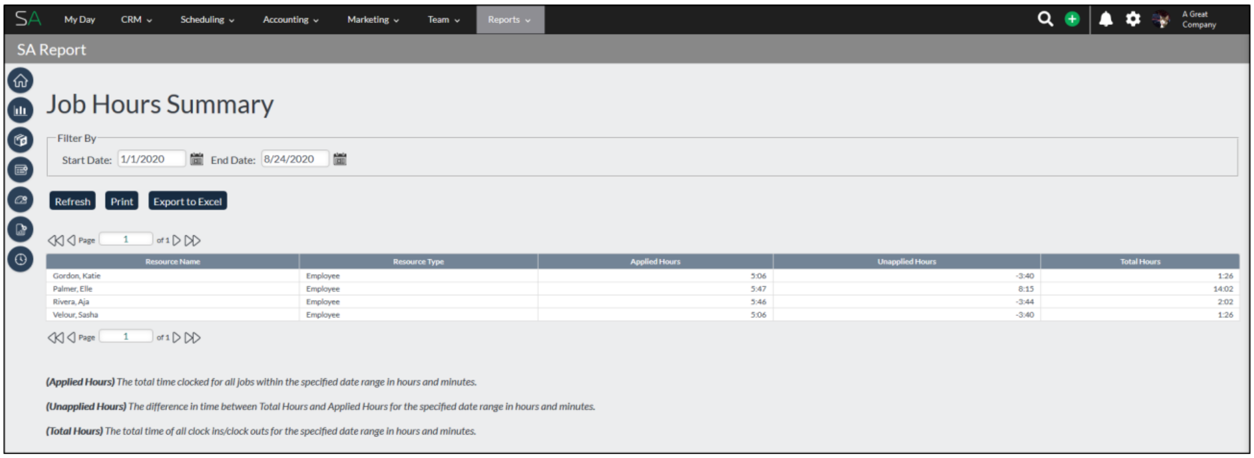
Actual Start/Stop time	the start and stop times that were clocked on the Visit (via a mobile app or manually recorded on the Dispatch Board).
Actual Hrs	total time spent on a Visit in decimal form (for multiple Resources: the total time worked multiplied by the number of Resources and divided by 60).
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.



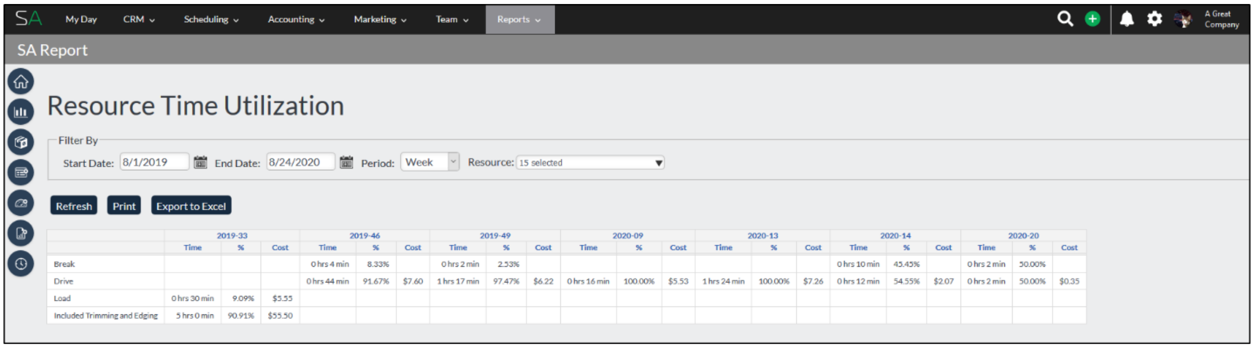
Description

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



Description

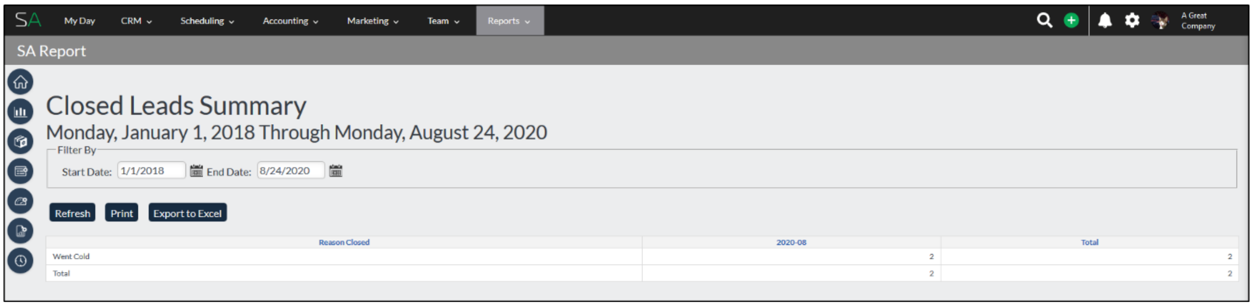
The rows of the report are divided into different types of time, such as breaks, drive time, and time spent on Services.

- 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.

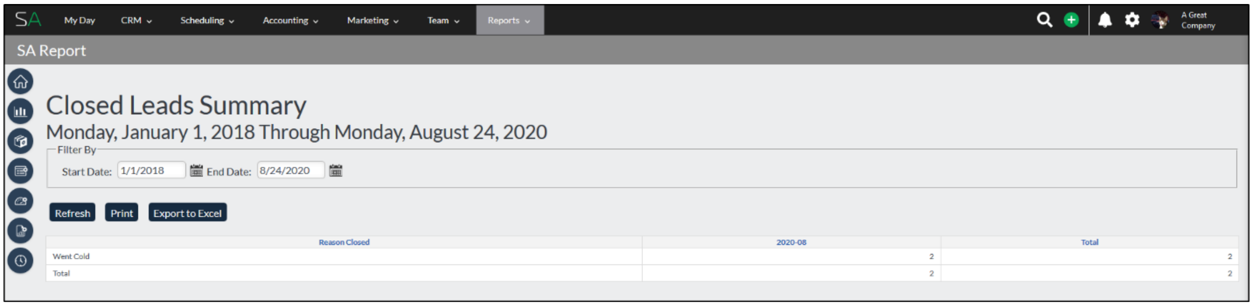


Description

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.



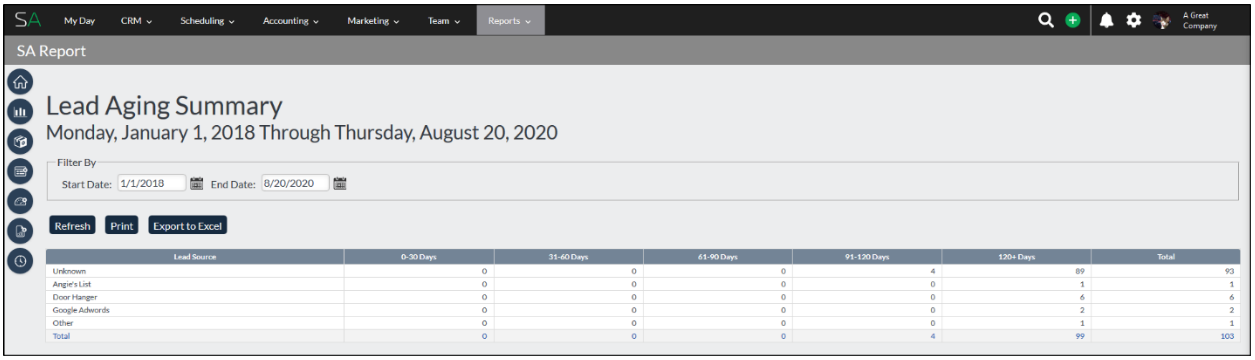
The columns in this report display the month and each category of leads and clients.

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**

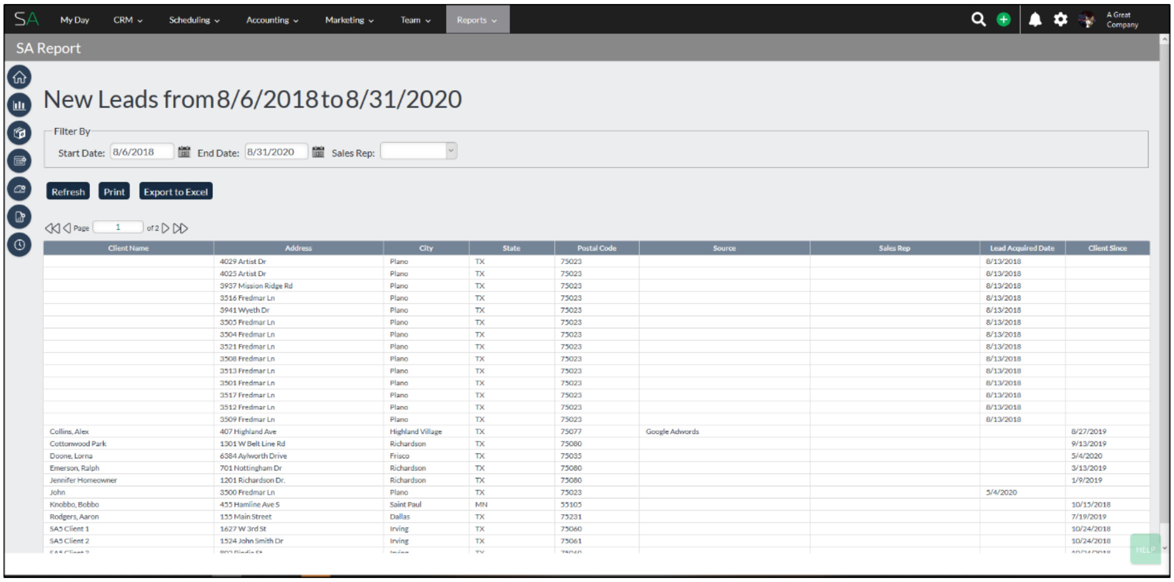
Day Range Number of leads by source type within day range (based pm the **Client Since Date**)

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.



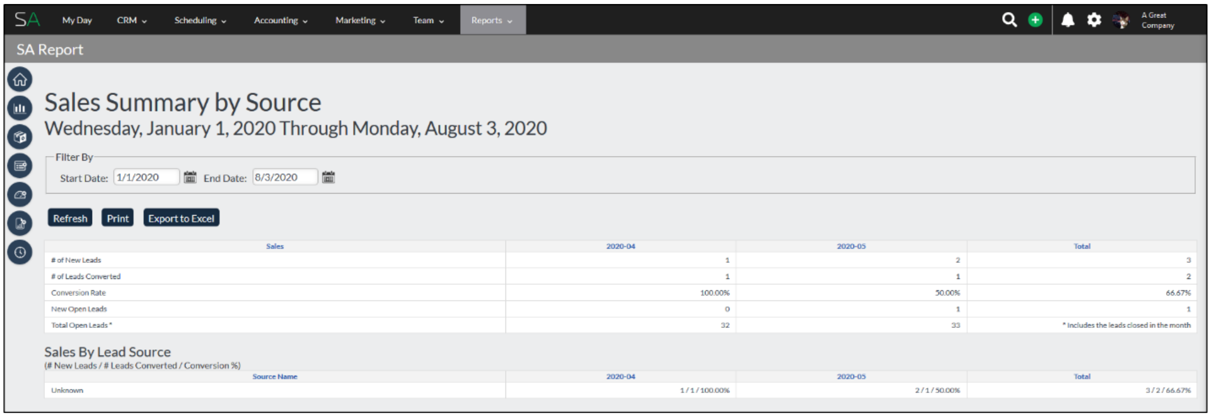
Description

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.



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

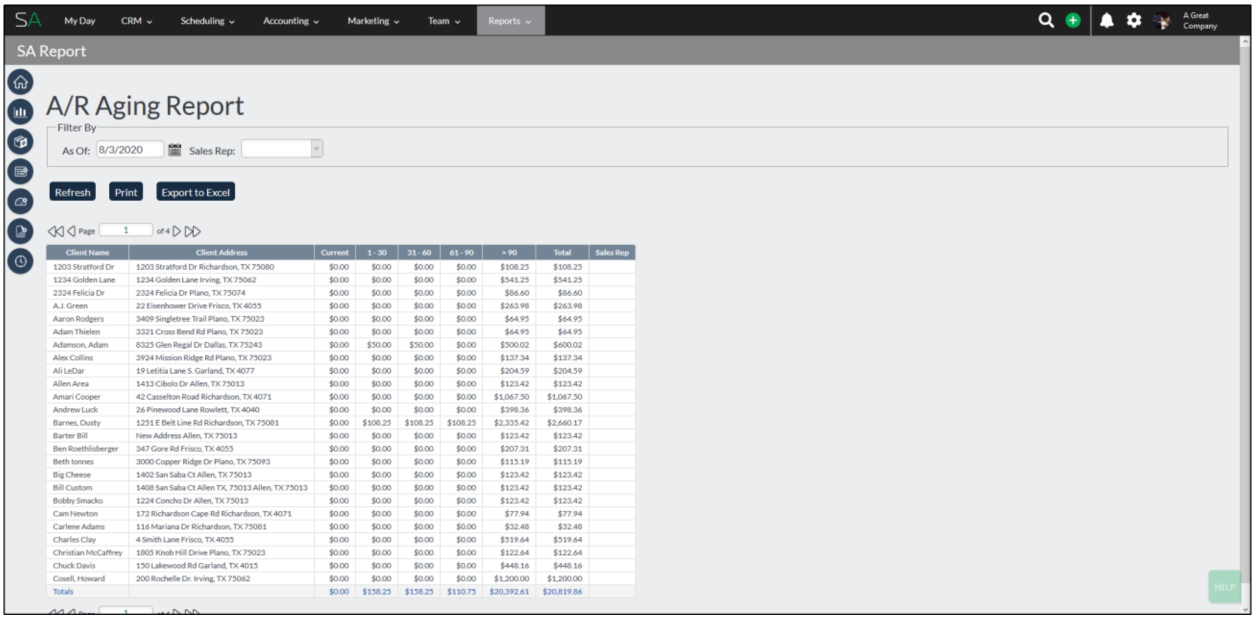
Total Total sales by source within a defined time frame

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
1203 Stratford Dr	1203 Stratford Dr Richardson, TX 75080	$0.00	$0.00	$0.00	$0.00	$108.25	$108.25	
1234 Golden Lane	1234 Golden Lane Irving, TX 75062	$0.00	$0.00	$0.00	$0.00	$541.25	$541.25	
2324 Felicia Dr	2324 Felicia Dr Plano, TX 75074	$0.00	$0.00	$0.00	$0.00	$86.60	$86.60	
A.J. Green	22 Eisenhower Drive Frisco, TX 4055	$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 Thielen	3321 Cross Bend Rd Plano, TX 75023	$0.00	$0.00	$0.00	$0.00	$64.95	$64.95	
Adamson, Adam	8325 Glen Regal 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	
Ali LeDar	19 Letitia Lane S. Garland, TX 4077	$0.00	$0.00	$0.00	$0.00	$204.59	$204.59	
Allen Area	1413 Cibolo 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	$1,067.50	$1,067.50	
Andrew Luck	26 Pinewood Lane Rowlett, TX 4040	$0.00	$0.00	$0.00	$0.00	$398.36	$398.36	
Barnes, Dusty	1251 E Belt Line Rd Richardson, TX 75081	$0.00	$108.25	$108.25	$108.25	$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 Ionnes	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 Custom	1408 San Saba Ct Allen TX, 75013 Allen, TX 75013	$0.00	$0.00	$0.00	$0.00	$123.42	$123.42	
Bobby Smacko	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	116 Mariana Dr Richardson, TX 75081	$0.00	$0.00	$0.00	$0.00	$32.48	$32.48	
Charles Clay	4 Smith Lane Frisco, TX 4055	$0.00	$0.00	$0.00	$0.00	$519.64	$519.64	
Christian McCaffrey	1805 Knob Hill Drive Plano, TX 75023	$0.00	$0.00	$0.00	$0.00	$122.64	$122.64	
Chuck Davis	150 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	$158.25	$158.25	$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)

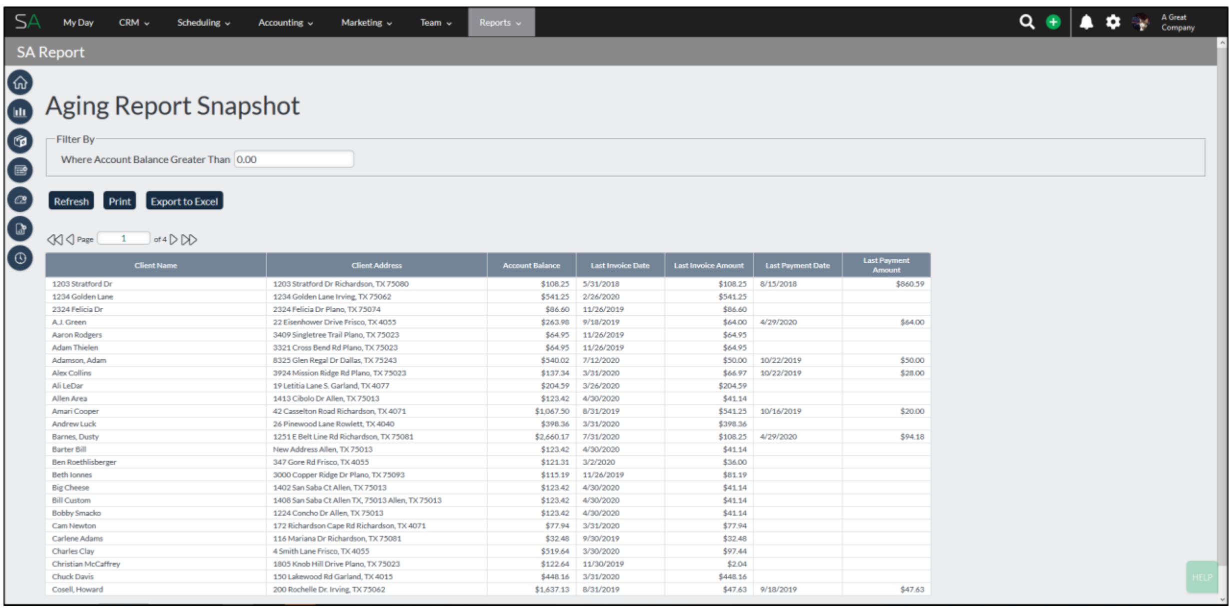
Sales Rep The Sales Representative for the client

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
1203 Stratford Dr	1203 Stratford Dr Richardson, TX 75080	$108.25	5/31/2018	$108.25	8/15/2018	$860.59
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 Thielen	3321 Cross Bend Rd Plano, TX 75023	$64.95	11/26/2019	$64.95		
Adamson, Adam	8325 Glen Regal Dr Dallas, TX 75243	$540.02	7/12/2020	$50.00	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
Ali LeDar	19 Letitia Lane S. Garland, TX 4077	$204.59	3/26/2020	$204.59		
Allen Area	1413 Cibolo Dr Allen, TX 75013	$123.42	4/30/2020	$41.14		
Amari Cooper	42 Casselton Road Richardson, TX 4071	$1,067.50	8/31/2019	$541.25	10/16/2019	$20.00
Andrew Luck	26 Pinewood Lane Rowlett, TX 4040	$398.36	3/31/2020	$398.36		
Barnes, Dusty	1251 E Belt Line Rd Richardson, TX 75081	$2,660.17	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 4055	$121.31	3/2/2020	$36.00		
Beth Ionnes	3000 Copper Ridge Dr Plano, TX 75093	$115.19	11/26/2019	$81.19		
Big Cheese	1402 San Saba Ct Allen, TX 75013	$123.42	4/30/2020	$41.14		
Bill Custom	1408 San Saba Ct Allen TX, 75013 Allen, TX 75013	$123.42	4/30/2020	$41.14		
Bobby Smacko	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		
Carlene 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 Lakewood Rd Garland, TX 4015	$448.16	3/31/2020	$448.16		
Cosell, Howard	200 Rochelle Dr. Irving, TX 75062	$1,637.13	8/31/2019	$47.63	9/18/2019	$47.63

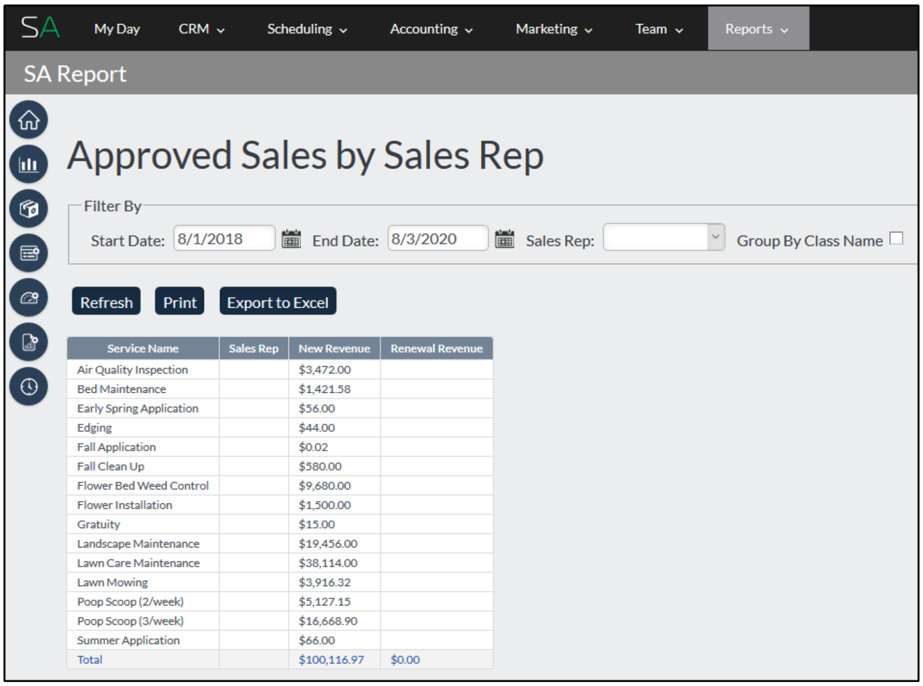
Description

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.



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

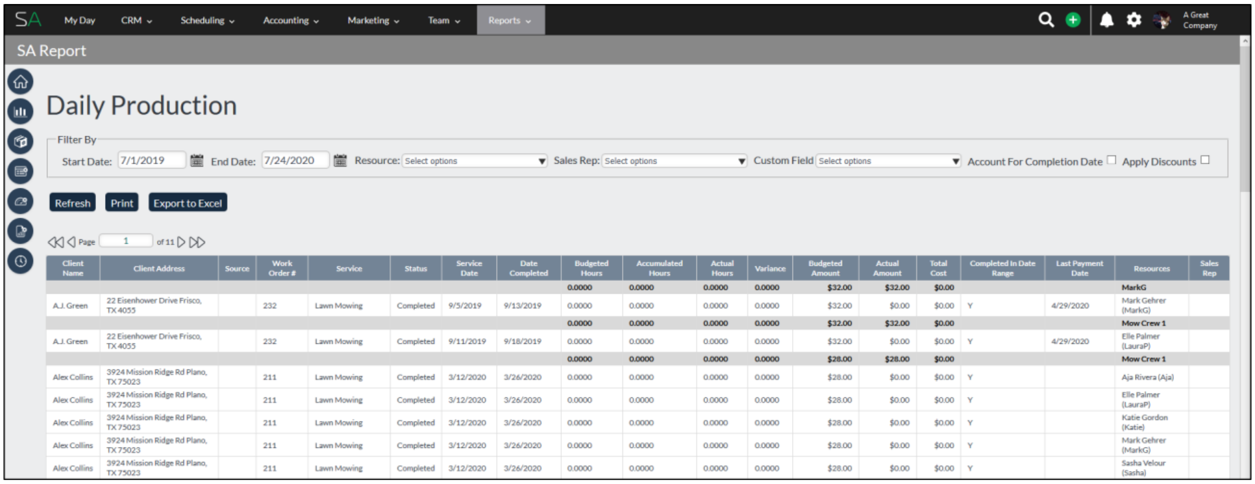
What's Not Included

- 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.



Description

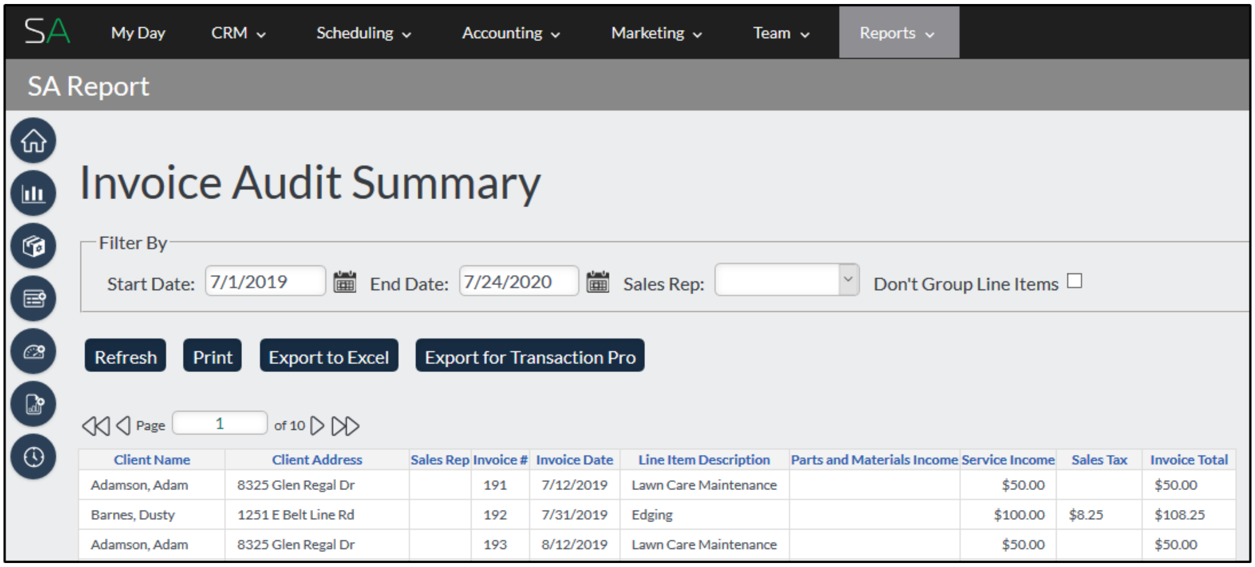
Some of the fields are also defined at the bottom of the report, in case you need a refresher.

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)	*If **Account for Completion Date** is checked and job was completed in the date range:* If (budgeted hours group accumulated hours) > 0 then ((budgeted hours group accumulated hours) / budgeted hours) * budgeted amount * (actual hours / group actual hours), otherwise 0. *If **Account for Completion Date** is checked and job was not completed in the date range:* 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.
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.



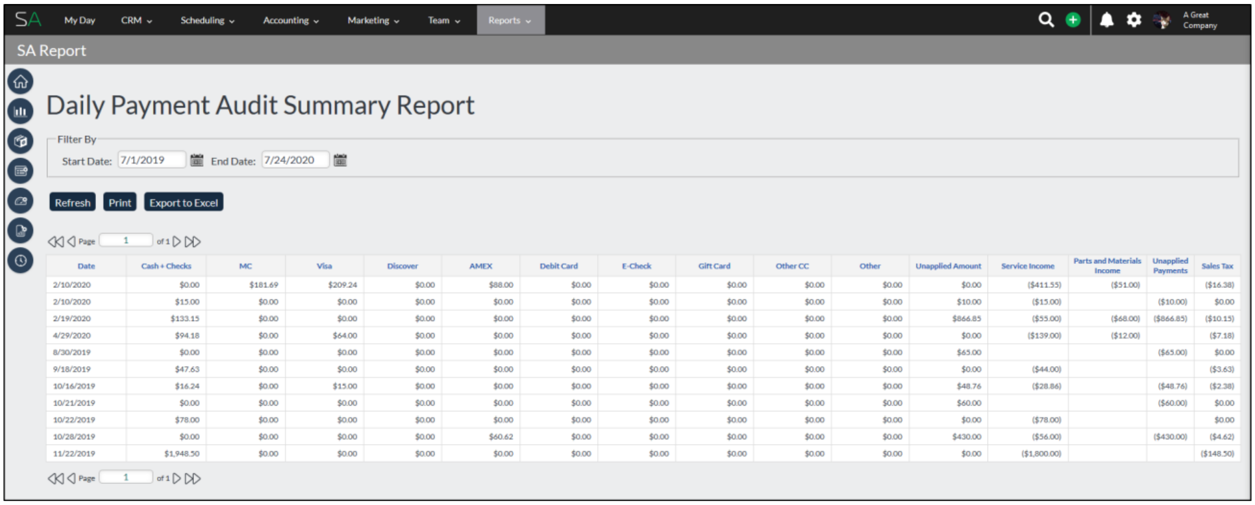
Description

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).



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)		($16.38)
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)	($866.85)	($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.

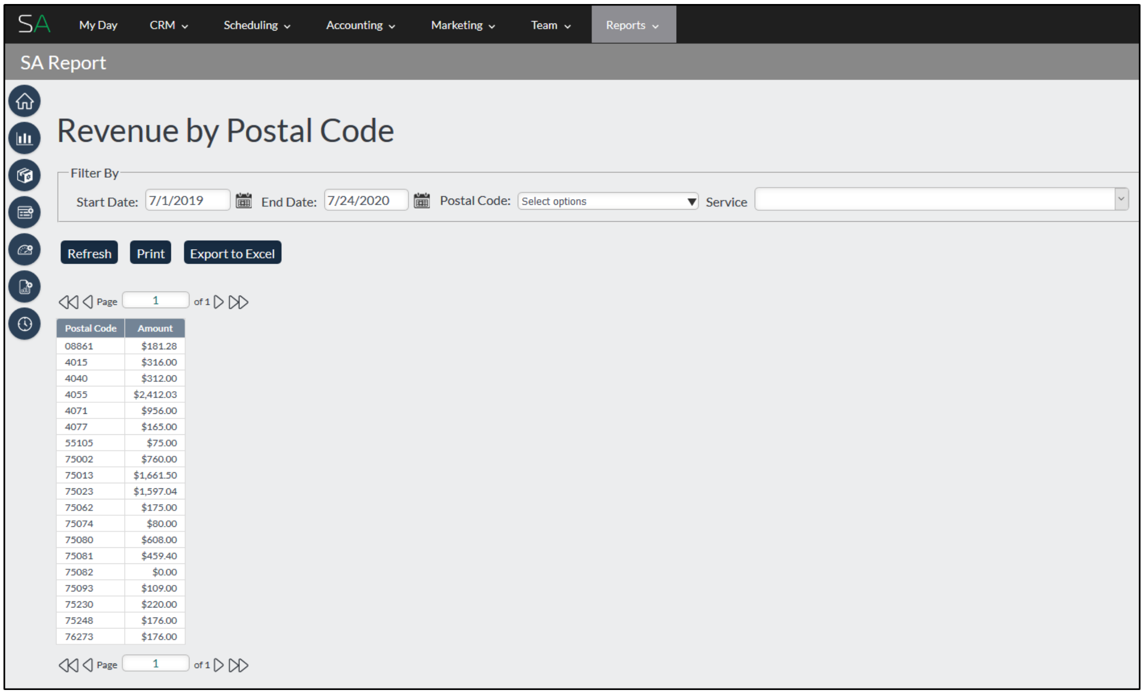
Date Date of payment

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.



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:

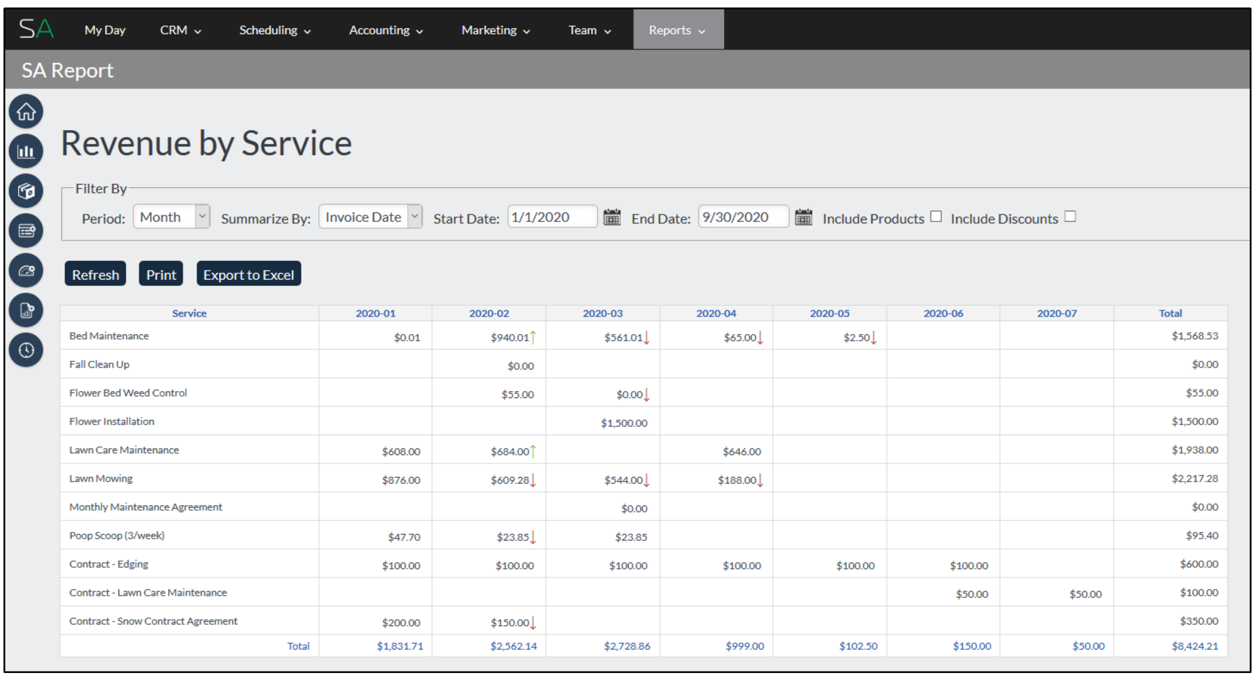
Period

- **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

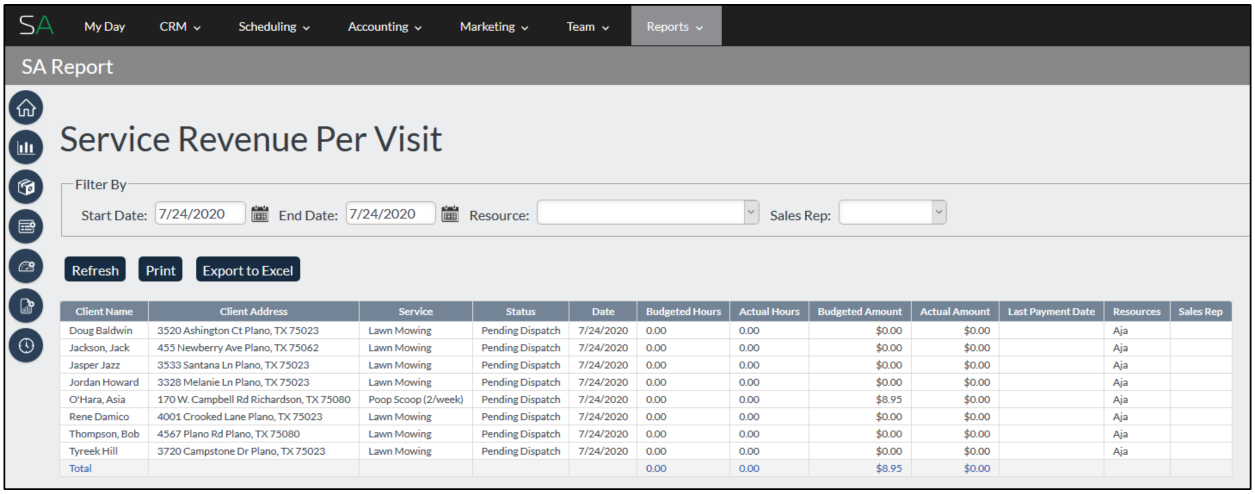
This report is designed to be viewed at a glance, so the content is limited. If there are points of comparison within the table, green up arrows or red down arrows will reflect the change in revenue across time.

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

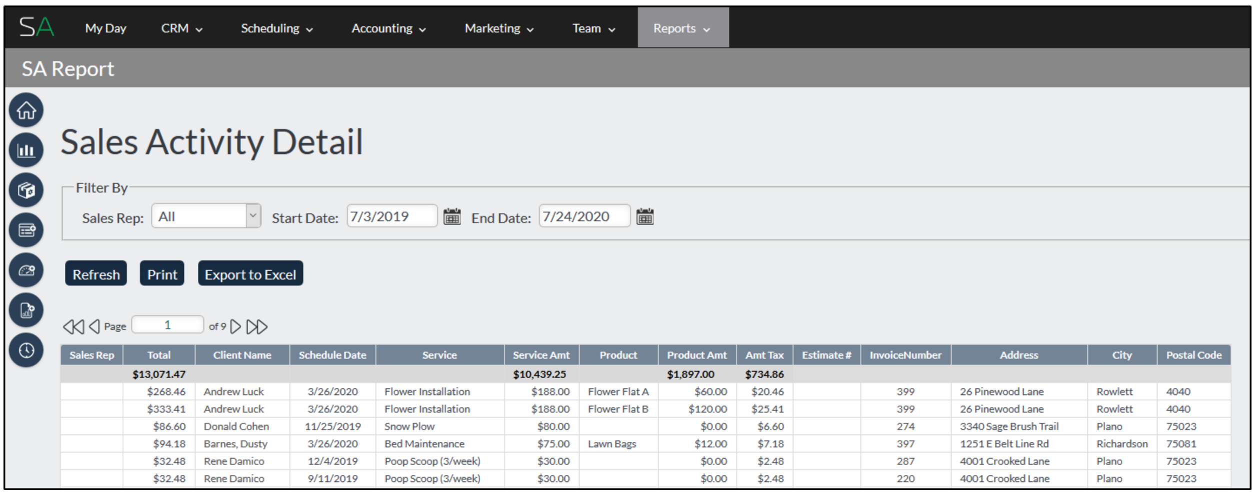
What's Not Included:

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.



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
	$86.60	Donald Cohen	11/25/2019	Snow Plow	$80.00		$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.

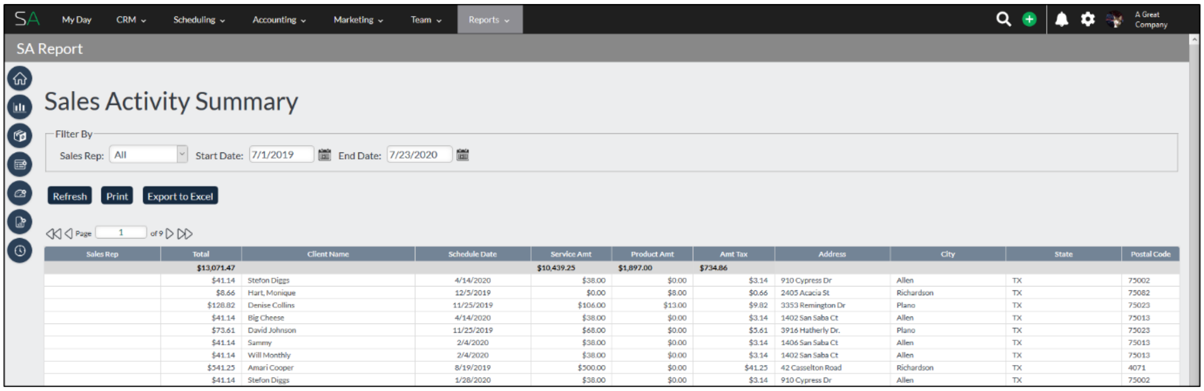
Note: Services completed under Contract will appear according to their scheduled rate amounts.

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.



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

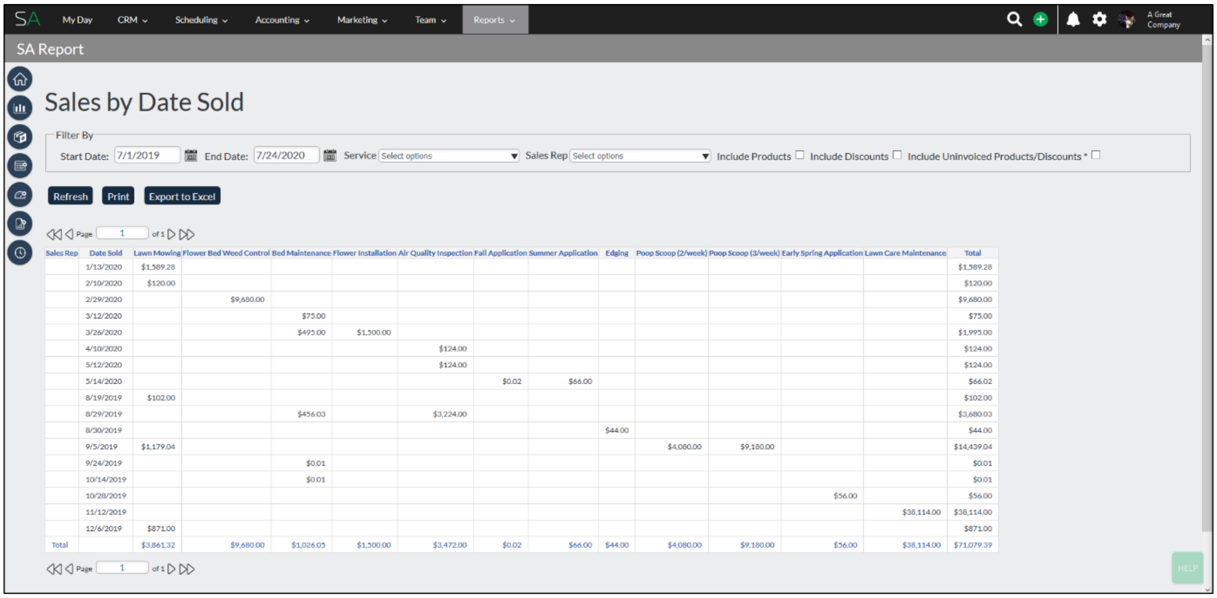
Services completed under Contract will appear according to their scheduled rate amounts.

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	$1,589.28												$1,589.28
	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	$1,500.00									$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	$1,179.04								$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	$1,026.05	$1,500.00	$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

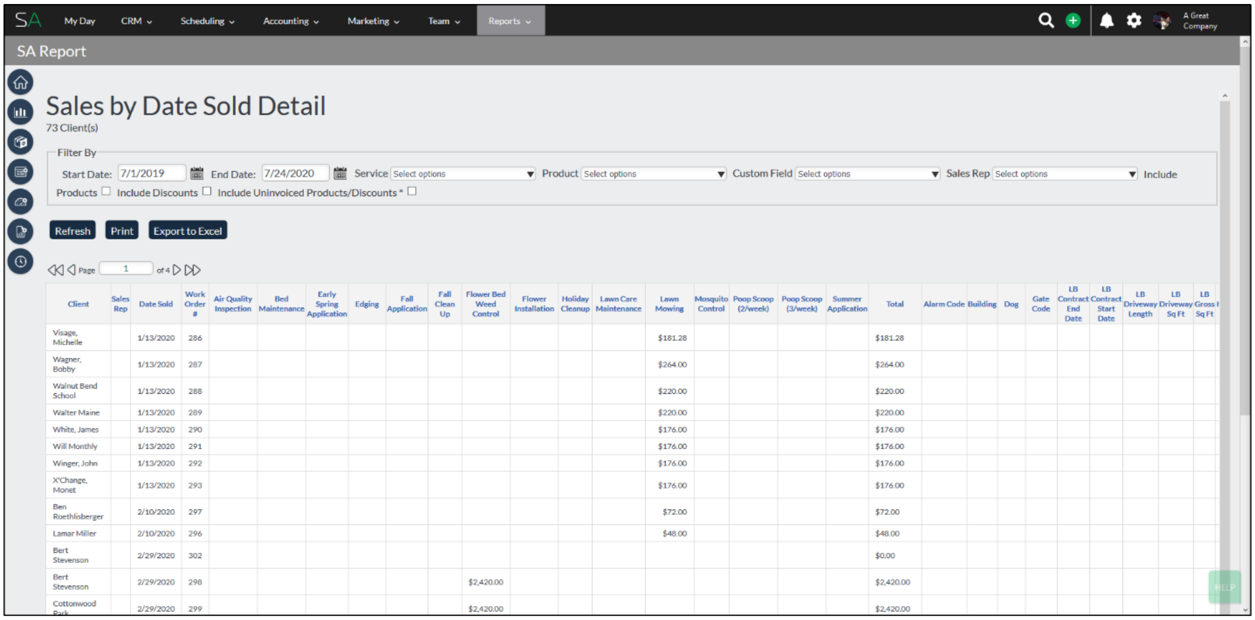
Include Products	Select this check box to include products on the report. This will **not** generate a column for products. If the visit is not invoiced, the product amounts will not be added unless you select the check box "Include Uninvoiced Products/Discounts."
Include Uninvoiced Products/Discounts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



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

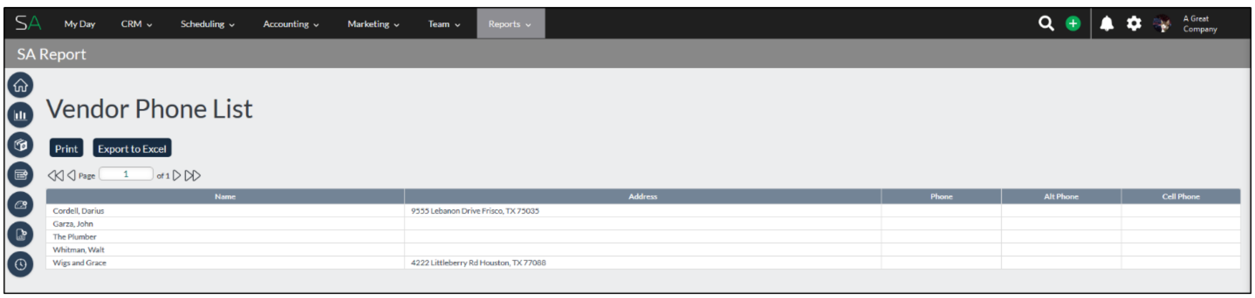
There are three different contact list reports available from the list of SA Reports:

- **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.



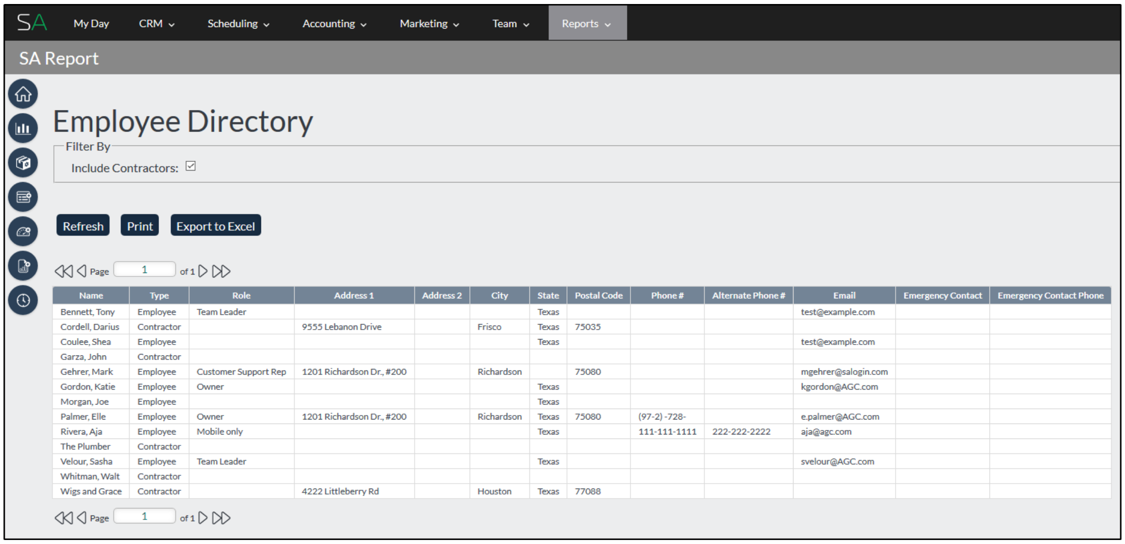
Description

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-		e.palmer@AGC.com		
Rivera, Aja	Employee	Mobile only				Texas		111-111-1111	222-222-2222	aja@agc.com		
The Plumber	Contractor											
Velour, Sasha	Employee	Team Leader				Texas				svelour@AGC.com		
Whitman, Walt	Contractor											
Wigs and Grace	Contractor		4222 Littleberry Rd		Houston	Texas	77088					

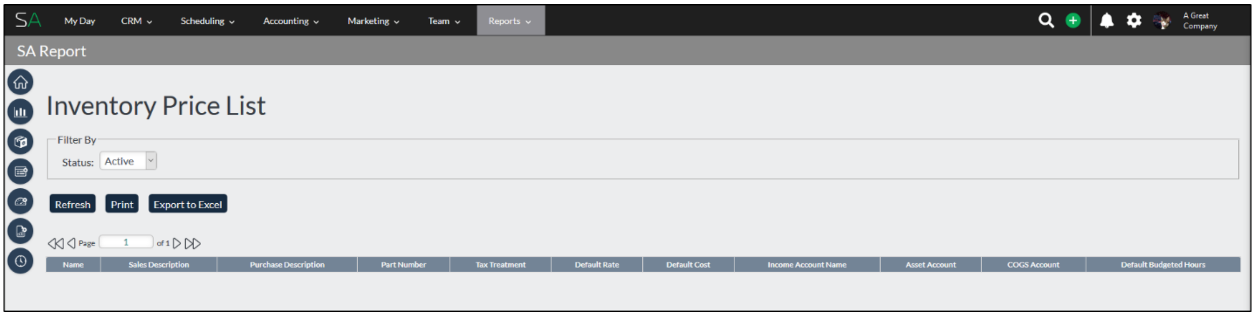
The information on this report is entered on the Edit overlay for an employee or vendor at:

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.



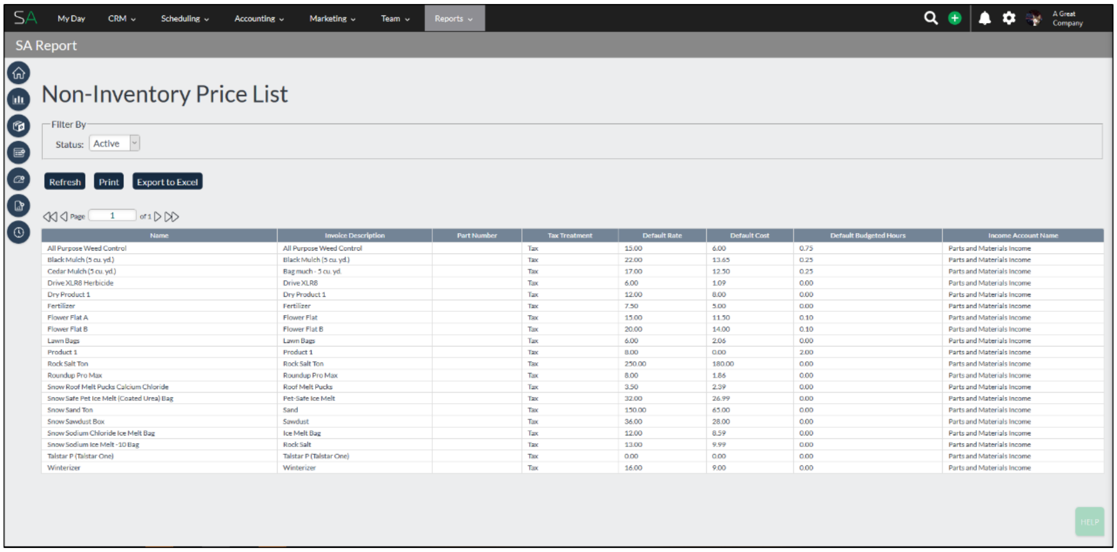
Description

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.



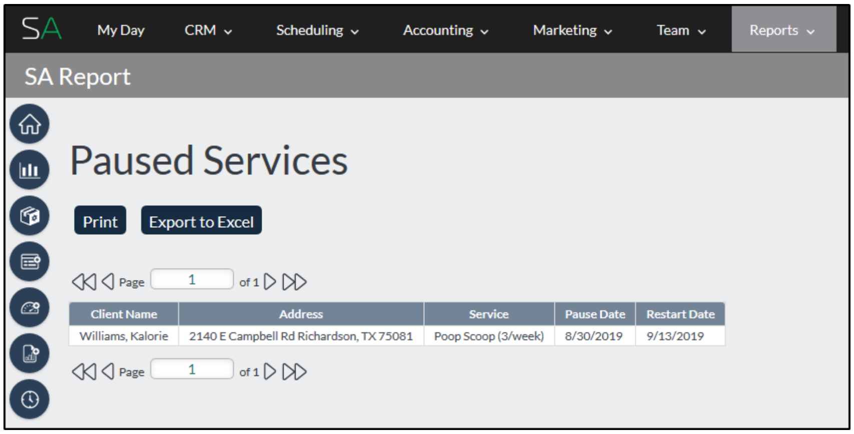
Name	Invoice Description	Part Number	Tax Treatment	Default Rate	Default Cost	Default Budgeted Hours	Income Account Name
All Purpose Weed Control	All Purpose Weed Control		Tax	15.00	6.00	0.75	Parts and Materials Income
Black Mulch (5 cu. yd.)	Black Mulch (5 cu. yd.)		Tax	22.00	13.65	0.25	Parts and Materials Income
Cedar Mulch (5 cu. yd.)	Bag much - 5 cu. yd.		Tax	17.00	12.50	0.25	Parts and Materials Income
Drive XLR8 Herbicide	Drive XLR8		Tax	6.00	1.09	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	5.00	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	2.06	0.00	Parts and Materials Income
Product 1	Product 1		Tax	8.00	0.00	2.00	Parts and Materials Income
Rock Salt Ton	Rock Salt Ton		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	Roof Melt Pucks		Tax	3.50	2.39	0.00	Parts and Materials Income
Snow Safe Pet Ice Melt (Coated Urea) Bag	Pet-Safe Ice Melt		Tax	32.00	26.99	0.00	Parts and Materials Income
Snow Sand Ton	Sand		Tax	150.00	65.00	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 Ice Melt -10 Bag	Rock Salt		Tax	13.00	9.99	0.00	Parts and Materials Income
Talstar P (Talstar One)	Talstar P (Talstar 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.

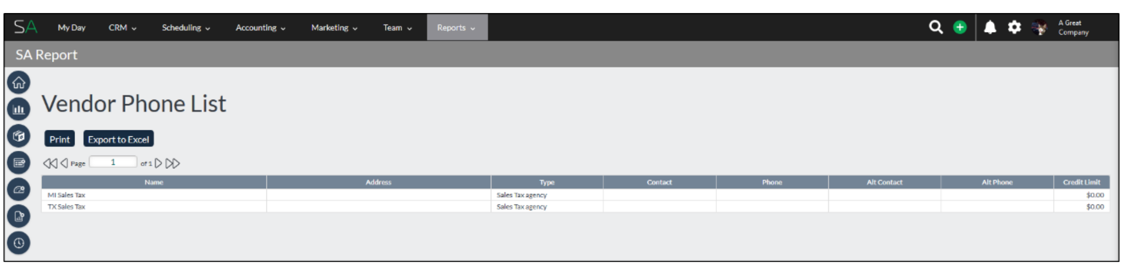


Description

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**



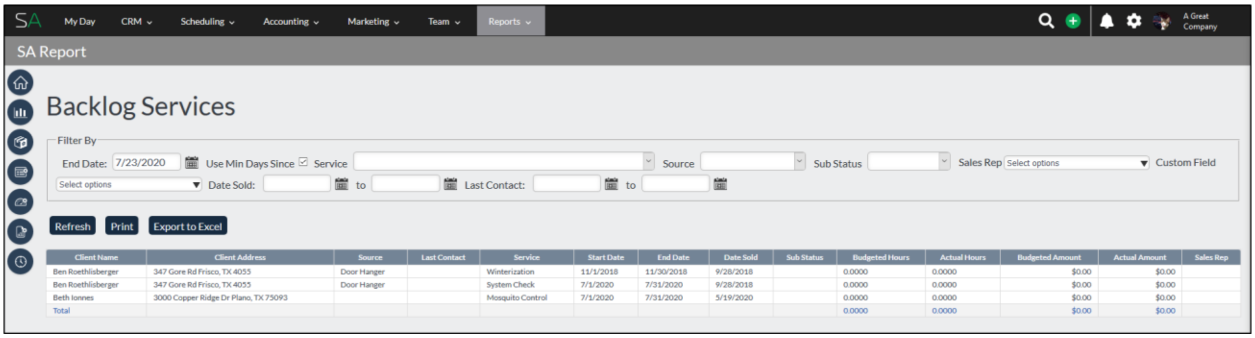
Description

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.

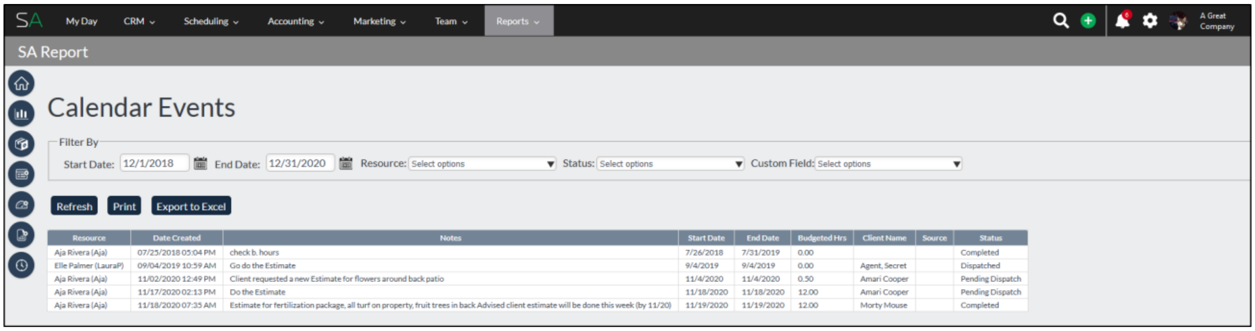


Description

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).



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

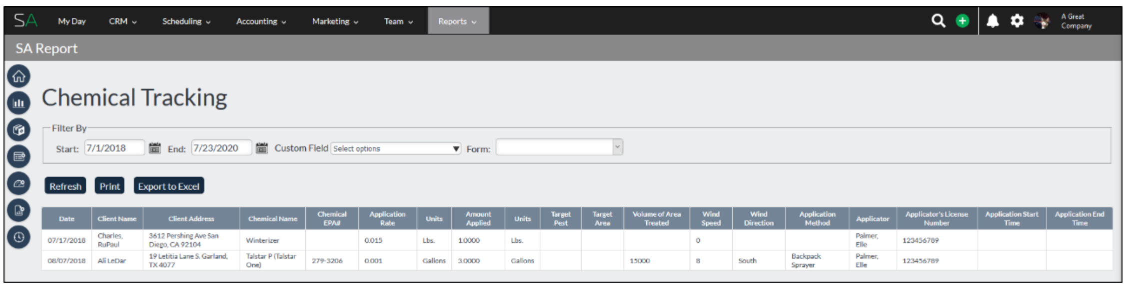
Chemical Tracking Report

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:



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.

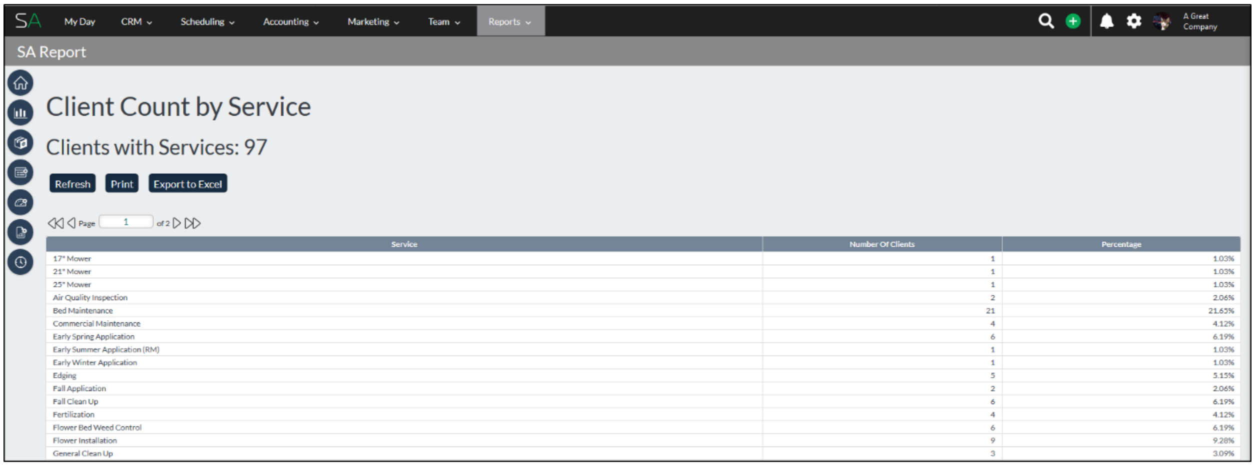
Add a Form to the Report

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:



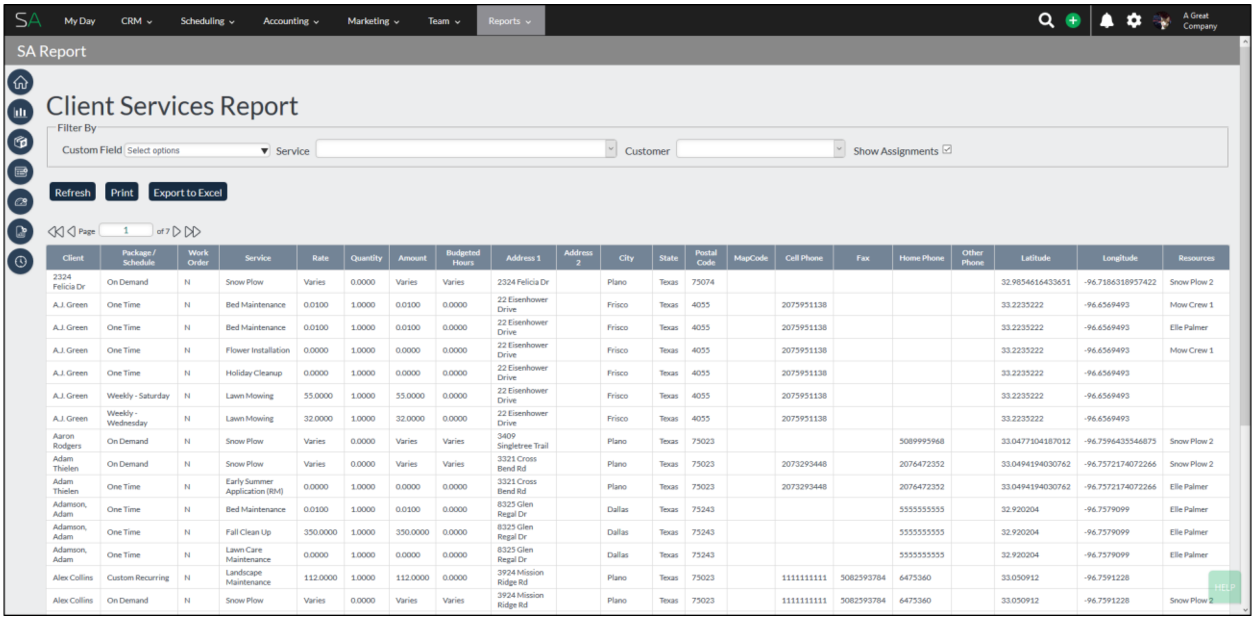
Description

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.



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.

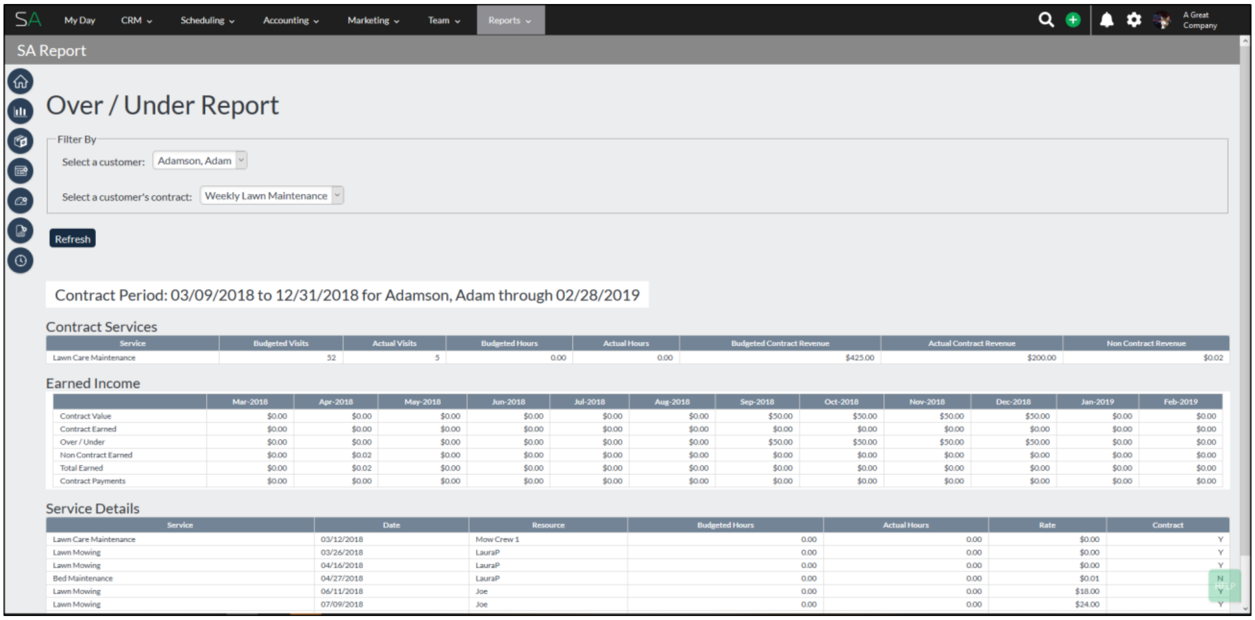
Description

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:



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.

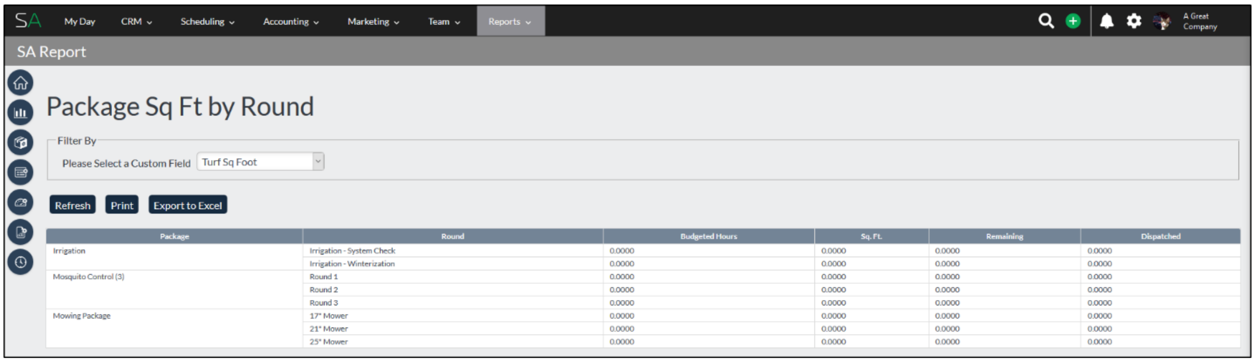
Service Details

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:

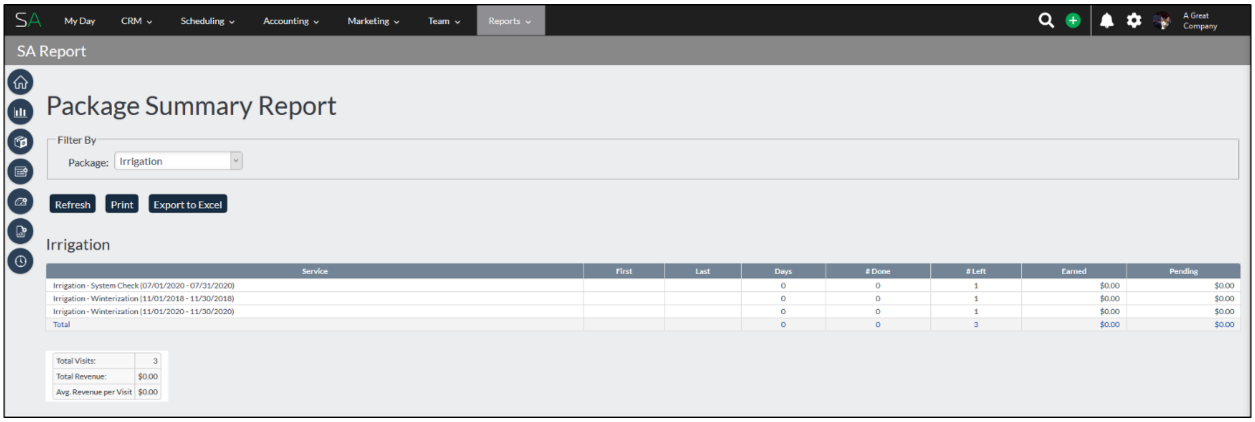


Description

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.



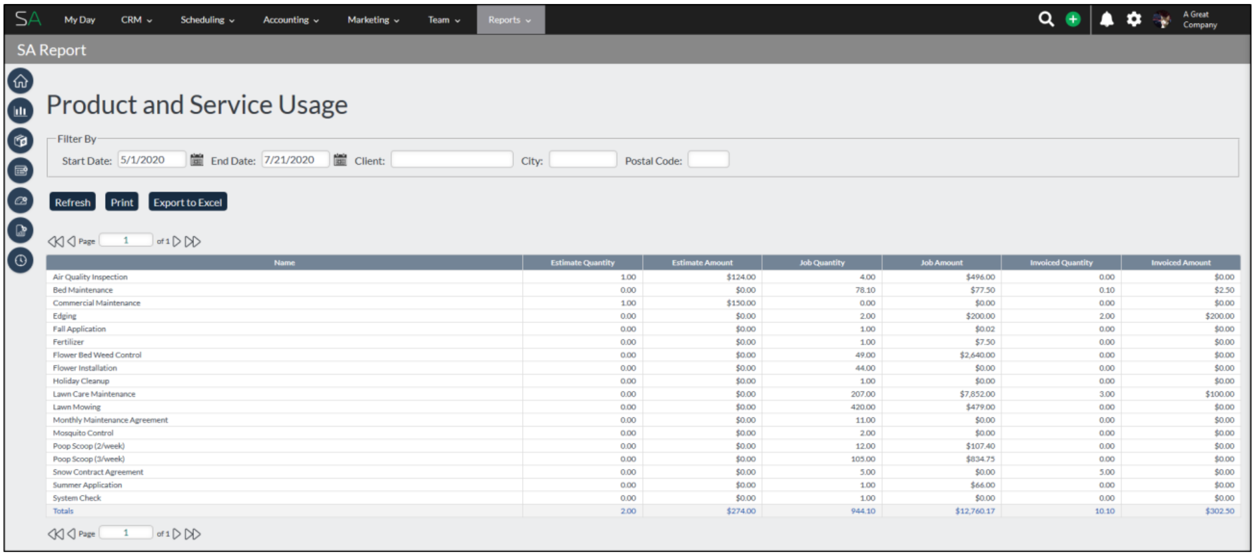
Description

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.



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

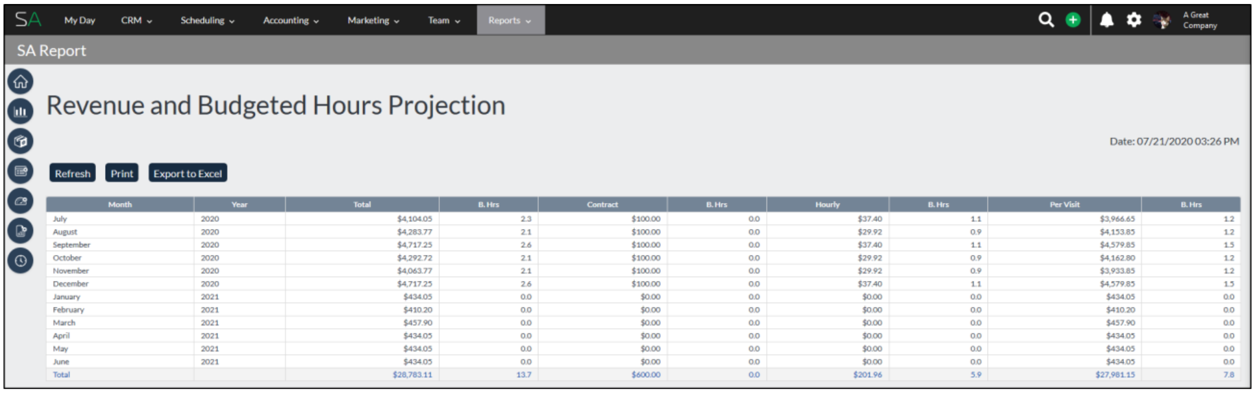
If services and products are added to one-time visits, they appear in the job columns and invoice columns after completion.

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	$4,283.77	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	1.5
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	$410.20	0.0	$0.00	0.0	$0.00	0.0	$410.20	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		$28,783.11	13.7	$600.00	0.0	$201.96	5.9	$27,981.15	7.8

Description

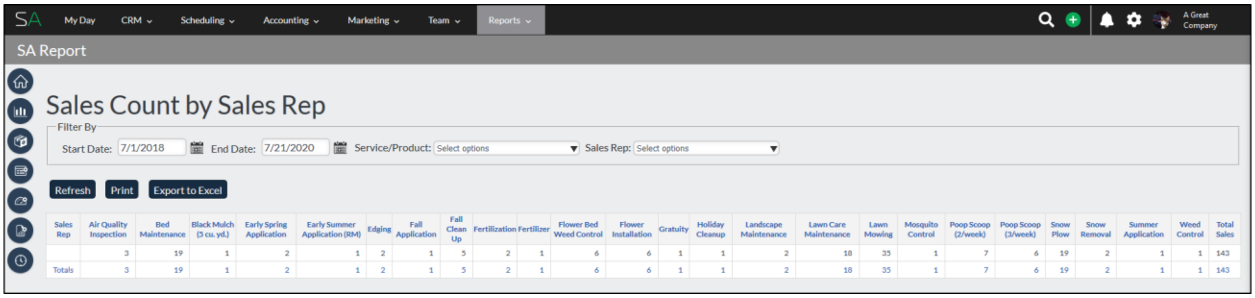
Services are divided into service modes: **Contract**, **Hourly**, and **Per Visit**. Budgeted Hours display for each month based on the service mode.

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.



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

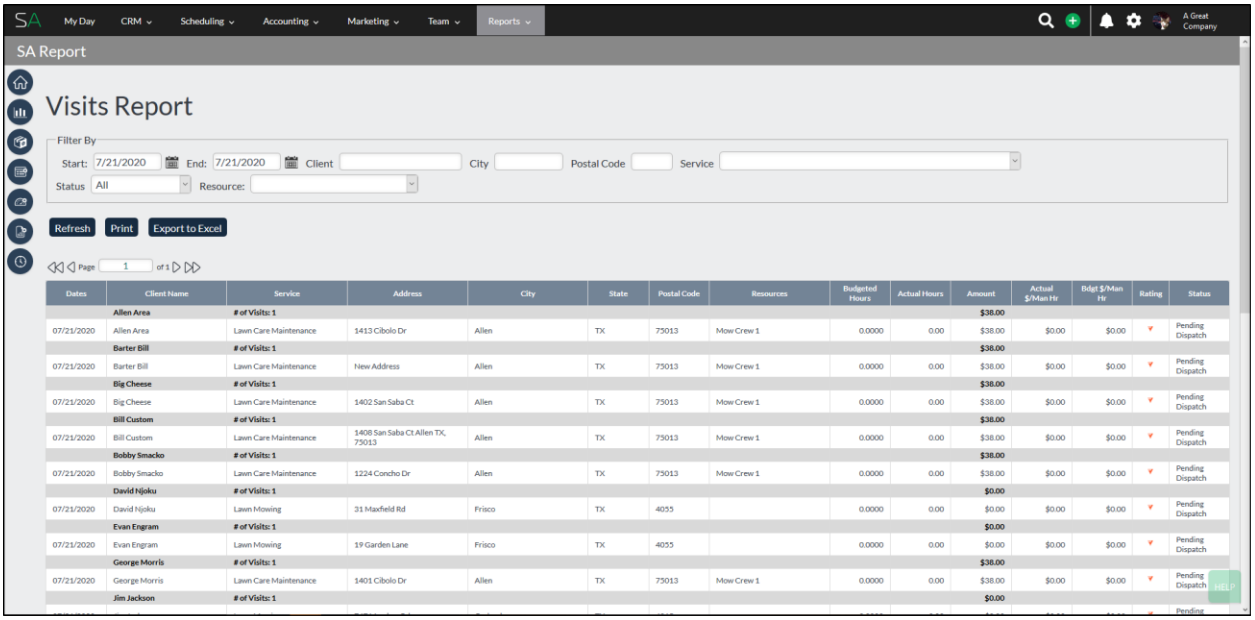
Description

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:



Description

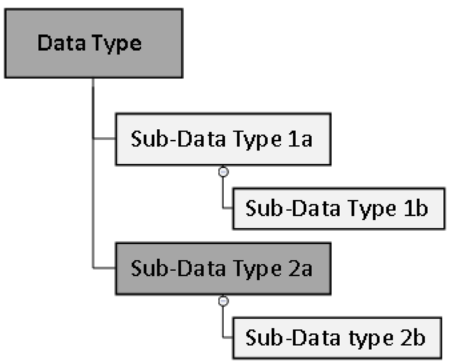
Dates	the date of the scheduled job
Client Name	the name on the Account where service was scheduled
Service	the service to be performed
Address	the service address
City	the city where service will be performed
State	the state where service will be performed
Postal Code	the postal code where service will 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.

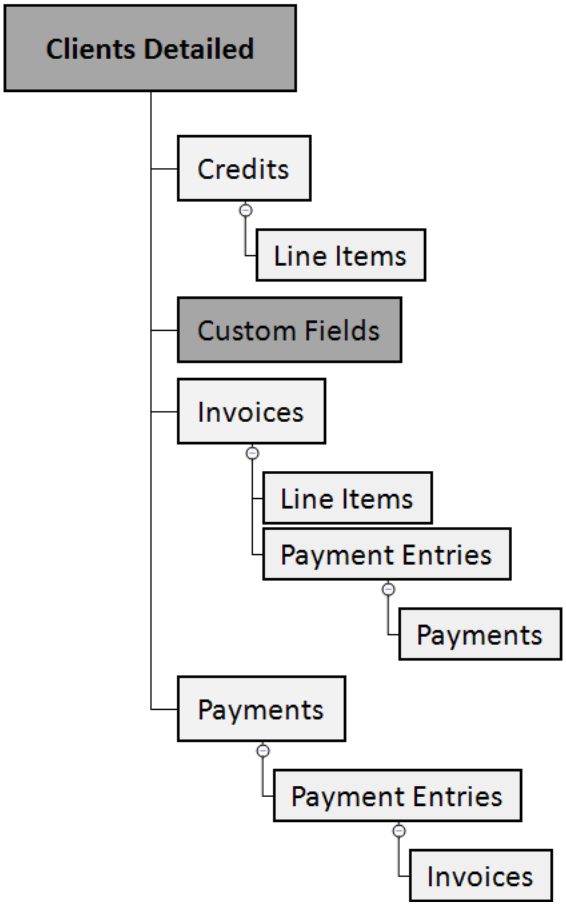
Overview of Analysis Data Types and Dependencies

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.

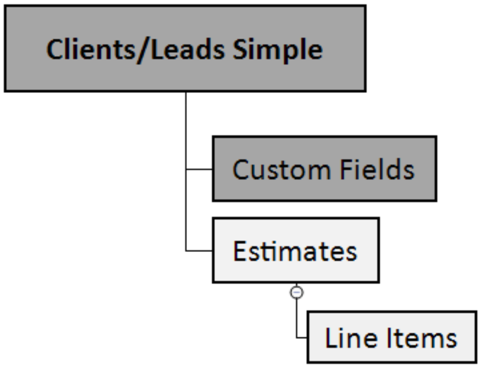


Note: All **darkened subfields** will be available within its branch, regardless of chosen dependent data type.

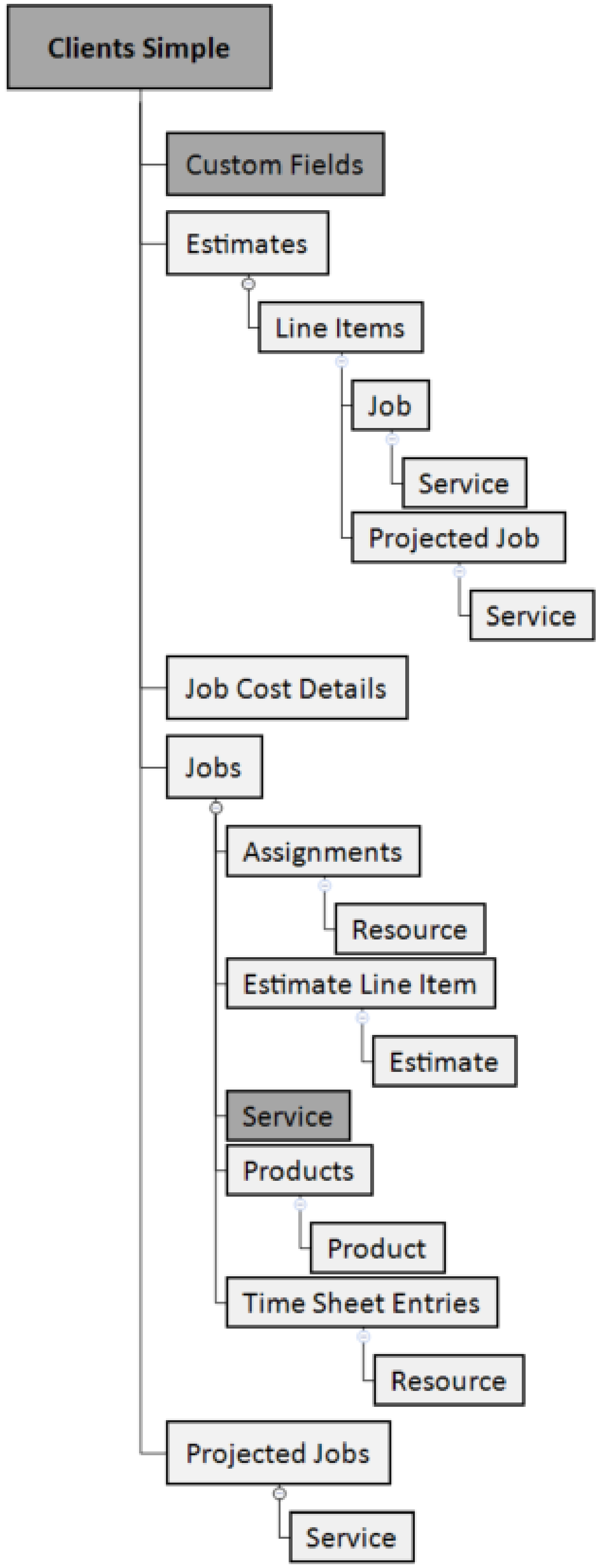
Clients Detailed



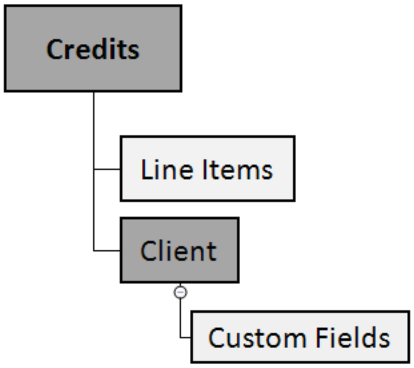
Clients/Leads Simple



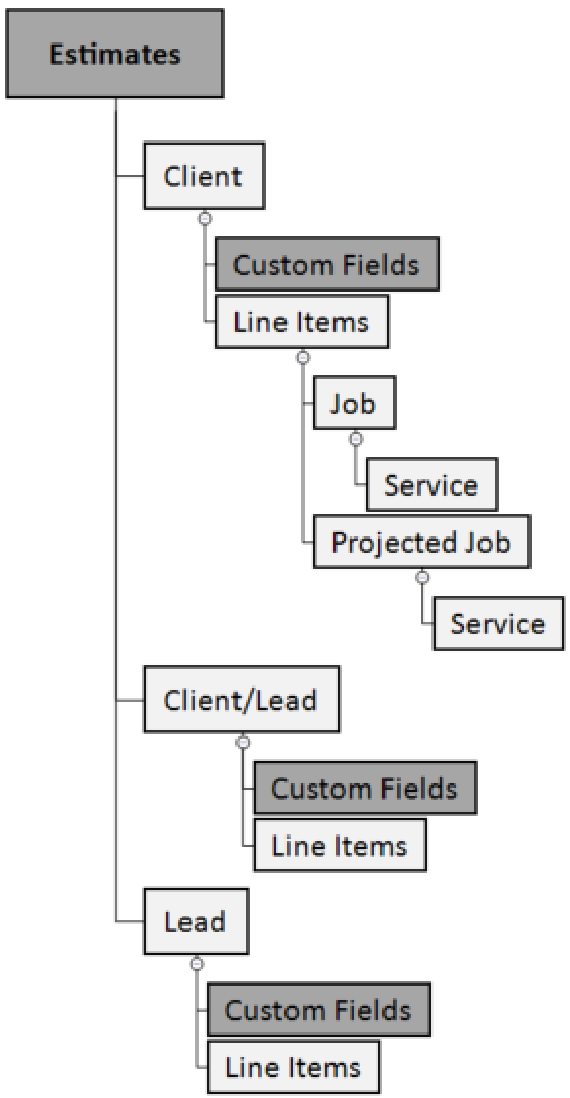
Clients Simple



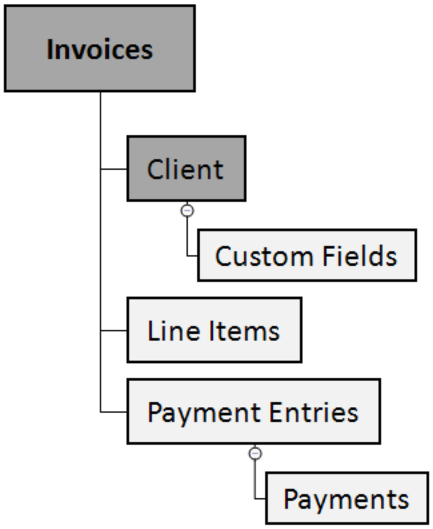
Credits



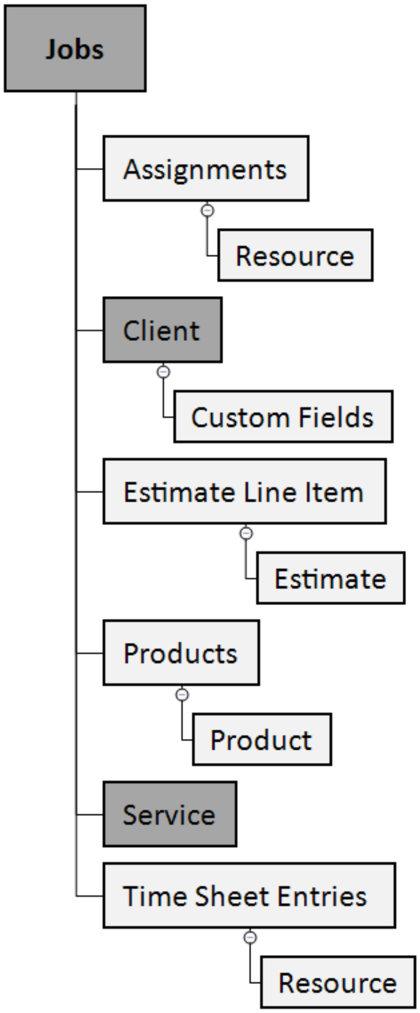
Estimates



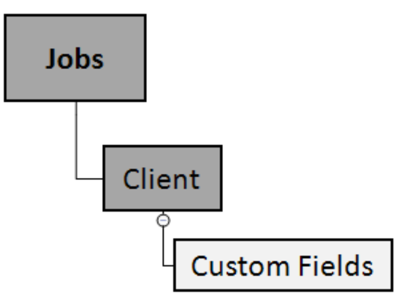
Invoices


Invoices
Client
Custom Fields
Line Items
Payment Entries
Payments

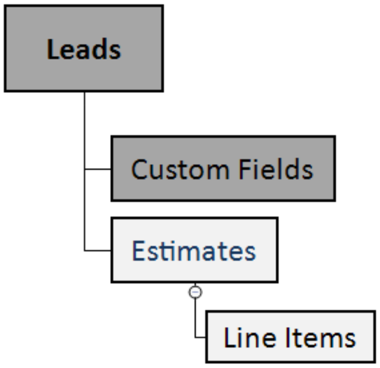
Jobs



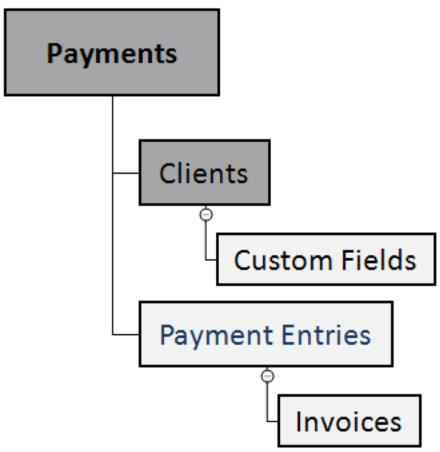
Job Cost Detail



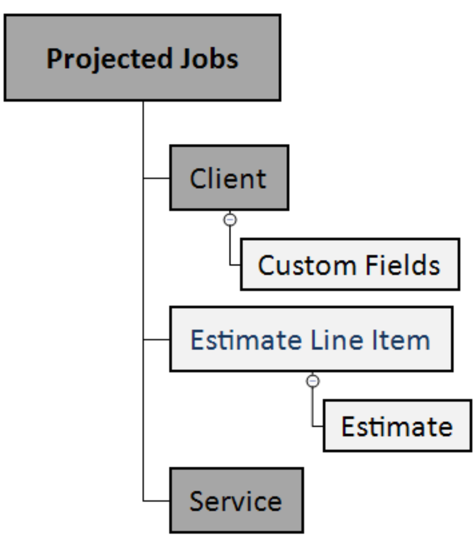
Leads



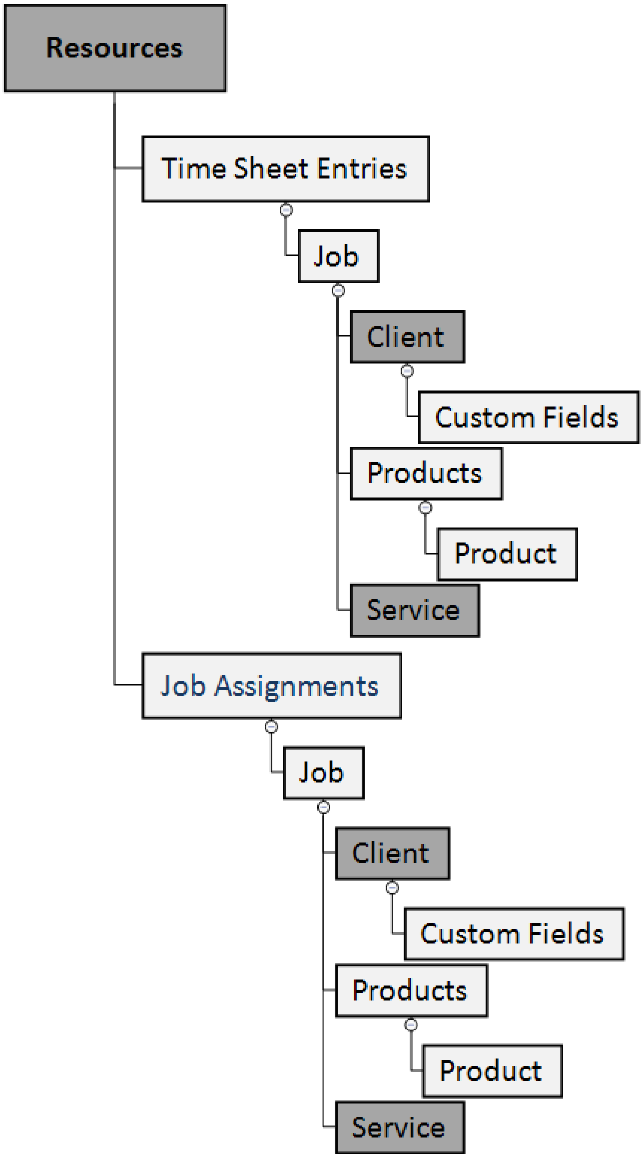
Payments



Projected Jobs

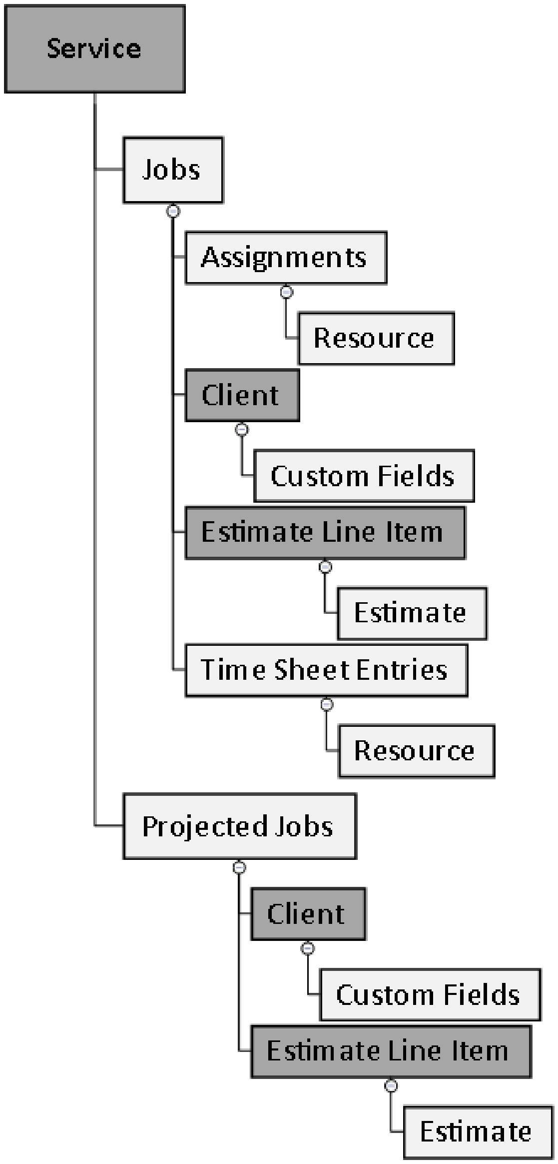


Resources



Resources
Time Sheet Entries
Job
Client
Custom Fields
Products
Product
Service
Job Assignments
Job
Client
Custom Fields
Products
Product
Service

Service


Service
Jobs
Assignments
Resource
Client
Custom Fields
Estimate Line Item
Estimate
Time Sheet Entries
Resource
Projected Jobs
Client
Custom Fields
Estimate Line Item
Estimate

Time Sheet Entry