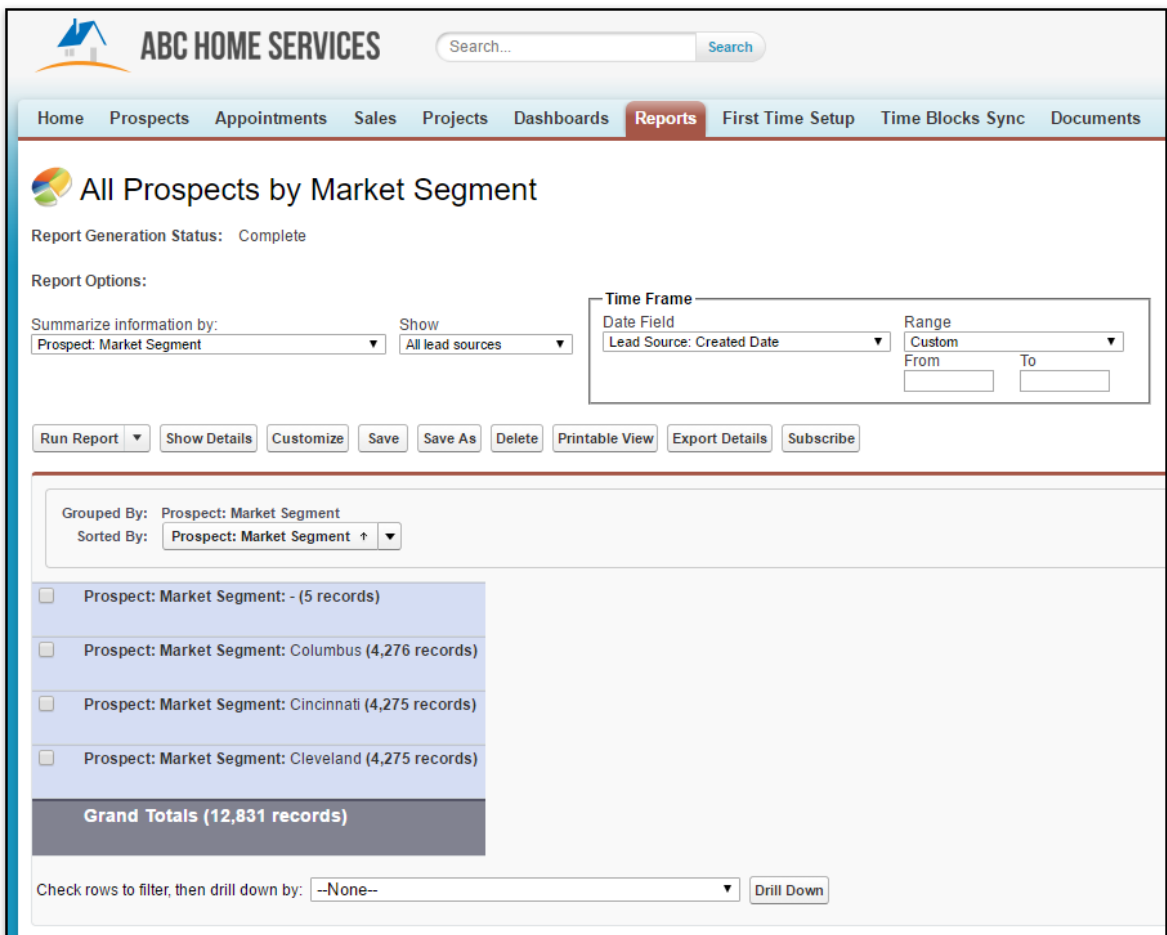


1 Reports and Dashboards

improveit 360 comes out-of-the-box with 50+ reports to get you the information you need to make better business decisions. Instead of giving you hundreds of reports to sift through, we have honed in on the most requested industry standard reports to give you more than a head start in getting all your KPI's in order. Since our reports are built on the force.com platform, you can customize each report to suit your specific business requirements. The following chapters provide a complete overview of every report and dashboard that comes standard with the improveit 360 system.

1.1 Prospects

1.1.1 All Prospects by Market Segment



All Prospects by Market Segments provides you a high-level look at the Prospects in your system summarized by their respective Market Segment. Regardless if your company uses Market Segments, this report provides you a view of all of the Prospects in your system. Set this report for a different time frame to get a snapshot of the new Prospects you entered in your system during a specific date range.

1.1.2 Prospects by Source MTD

ABC HOME SERVICES Search... Search

Home Prospects Appointments Sales Projects Dashboards **Reports** First Time Setup Time Blocks Sync Documents

Prospects by Source MTD

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame: Date Field Range
 From To

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe

Grouped By: Sorted By:

<input type="checkbox"/>	Source Name: Email Blast (19 records)
<input type="checkbox"/>	Source Name: Home Depot (25 records)
<input type="checkbox"/>	Source Name: Internet Ad (13 records)
<input type="checkbox"/>	Source Name: Lowes (6 records)
<input type="checkbox"/>	Source Name: Paper Ad (6 records)
<input type="checkbox"/>	Source Name: Radio Commercial (10 records)
<input type="checkbox"/>	Source Name: TV Commercial (3 records)
<input type="checkbox"/>	Source Name: Walmart (5 records)
<input type="checkbox"/>	Source Name: Website - Free Estimate (4 records)
Grand Totals (91 records)	

Prospects by Sources provides you a summarized list of all of the Prospects entered into your system during the current month. Use this report to gauge how many Prospects your active Sources are providing you. Change the time frame to view a larger or smaller snapshot of the Prospects entered by Source. Remember to click 'Show Details' to view more information.

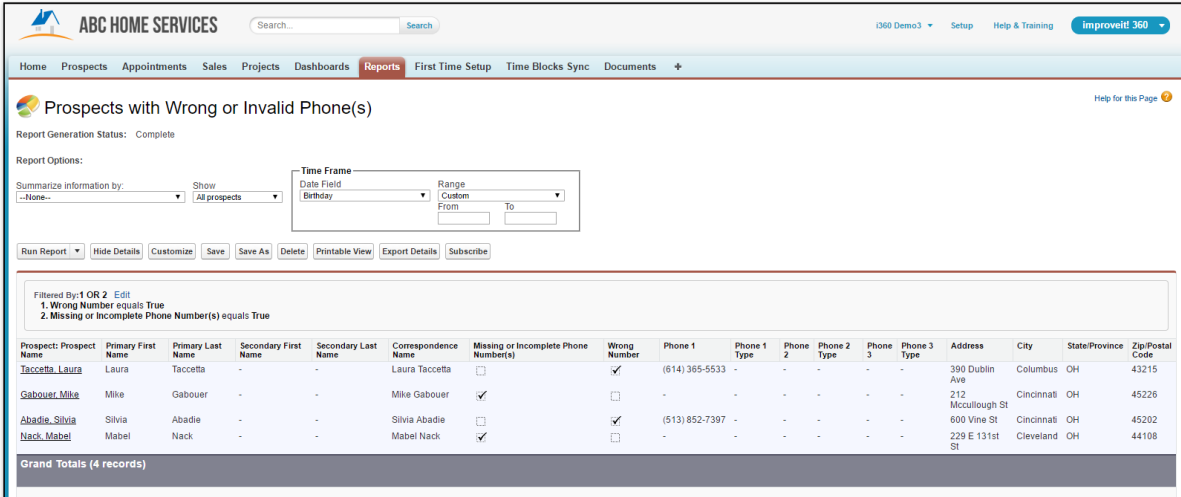
1.1.3 All Prospects with Email Addresses

The screenshot shows the ABC Home Services web application. At the top, there is a search bar and a navigation menu with options like Home, Prospects, Appointments, Sales, Projects, Dashboards, Reports (highlighted), First Time Setup, Time Blocks Sync, and Documents. The main heading is 'Prospects with Email Addresses'. Below this, there is a 'Report Generation Status' note and 'Report Options' section. The 'Report Options' section includes a 'Summarize information by' dropdown set to '--None--', a 'Show' dropdown set to 'All lead sources', and a 'Time Frame' section with a 'Date Field' dropdown set to 'Lead Source: Created Date' and a 'Range' dropdown set to 'Custom'. Below these are buttons for 'Run Report', 'Hide Details', 'Customize', 'Save', 'Save As', 'Delete', 'Printable View', 'Export Details', and 'Subscribe'. A filter section shows 'Filtered By: Edit' with two criteria: 'Prospect: Primary Email not equal to Clear' and 'AND Prospect: Opt Out Email equals False Clear'. The main content area displays a table with two columns: 'Prospect: Prospect Name' and 'Prospect: Primary Email'. The table lists 12 prospects with their names and email addresses.

Prospect: Prospect Name	Prospect: Primary Email
Rokosz, Fausto	fausto@rokoz.com
Domenice, Graig	graig@domenice.com
Saluan, Antonia	antonia@saluan.com
Chagova, Bobby	bobby@chagova.com
Dillehay, Elma	elma@dillehay.com
Rooney, Wyatt	wyatt@rooney.com
Druckhammer, Florentino	florentino@druckhammer.com
Spitale, Candice	candice@spitale.com
Revis, Elvira	elvira@revis.com
Landolfo, Herman	herman@landolfo.com
Suter, Donald	donald@suter.com

Prospects with Emails Addresses is the perfect report for pulling a list of all of the Prospect email addresses in your system. Only Prospects that have an primary email address and have not opted out of your email campaigns will appear in the report. Export this report to use in third party mass email tools.

1.1.4 Prospects with Wrong or Invalid Phone(s)



ABC HOME SERVICES | Search... | 360 Demo3 | Setup | Help & Training | improveit 360

Home | Prospects | Appointments | Sales | Projects | Dashboards | **Reports** | First Time Setup | Time Blocks Sync | Documents

Prospects with Wrong or Invalid Phone(s)

Report Generation Status: Complete

Report Options:

Summarize information by: Show | Time Frame: Date Field Range From To

Run Report | Hide Details | Customize | Save | Save As | Delete | Printable View | Export Details | Subscribe

Filtered By: 1 OR 2 [Edit](#)
 1. Wrong Number equals True
 2. Missing or Incomplete Phone Number(s) equals True

Prospect Name	Primary First Name	Primary Last Name	Secondary First Name	Secondary Last Name	Correspondence Name	Missing or Incomplete Phone Number(s)	Wrong Number	Phone 1	Phone 1 Type	Phone 2	Phone 2 Type	Phone 3	Phone 3 Type	Address	City	State/Province	Zip/Postal Code
Taccetta, Laura	Laura	Taccetta	-	-	Laura Taccetta	<input type="checkbox"/>	<input checked="" type="checkbox"/>	(614) 365-5533	-	-	-	-	-	390 Dublin Ave	Columbus	OH	43215
Gabouer, Mike	Mike	Gabouer	-	-	Mike Gabouer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	-	-	-	-	-	-	212 Niccollough St	Cincinnati	OH	45226
Abadie, Silvia	Silvia	Abadie	-	-	Silvia Abadie	<input type="checkbox"/>	<input checked="" type="checkbox"/>	(513) 852-7397	-	-	-	-	-	600 Vine St	Cincinnati	OH	45202
Nack, Mabel	Mabel	Nack	-	-	Mabel Nack	<input checked="" type="checkbox"/>	<input type="checkbox"/>	-	-	-	-	-	-	229 E 131st St	Cleveland	OH	44108

Grand Totals (4 records)

Prospects with Wrong or Invalid phone numbers provides you a list of Prospects that cannot be contacted by phone. This is due to no phone number being entered on the Prospect record or your Users marking the phone number as invalid. Use this report to creating a snail mail list for these Prospects who cannot be contacted by phone and to keep eyes on any Lead Provider who is providing inaccurate information.

1.2 Lead Sources

1.2.1 Lead Source Performance

	Lead Sources	Set	Canceled	Issue	Demo	Sold	Sold Price	Issue %	Demo %	Cancel %	Sold %
Source Name: Home Depot (4,279 records)	4,278	3,421	0	2,592	2,592	1,676	\$22,165,926.15	61%	61%	11%	39%
Source Name: Email Blast (2,139 records)	2,139	1,710	0	1,347	1,347	864	\$11,278,414.00	63%	63%	8%	40%
Source Name: Internet Ad (2,137 records)	2,137	1,711	0	1,244	1,244	812	\$10,895,383.00	58%	58%	13%	38%
Source Name: Radio Commercial (1,425 records)	1,425	1,141	0	863	863	559	\$7,508,755.00	61%	61%	11%	39%
Source Name: Walmart (713 records)	712	571	0	483	483	305	\$4,089,193.00	68%	68%	4%	43%
Source Name: TV Commercial (712 records)	712	570	0	381	381	254	\$3,377,019.00	54%	54%	18%	36%
Source Name: Paper Ad (712 records)	712	570	0	483	483	306	\$3,852,214.00	68%	68%	4%	43%
Source Name: Lowes (712 records)	712	570	0	381	381	254	\$3,227,043.00	54%	54%	18%	36%
Source Name: Website - Free Estimate (4 records)	4	4	0	2	2	2	\$5,895.00	50%	50%	0%	50%
Grand Totals (12,833 records)	12,831	10,268	0	7,776	7,776	5,032	\$66,399,842.15	61%	61%	11%	39%

The Lead Source Performance report is the first step in understanding which marketing source is performing and which is not. This report quickly provides you the a snapshot of the number of Lead Sources entered, Appointments set and their results per Source. Remember you can always narrow the time frame by adding dates in the 'Range' section of the report and clicking 'Run Report'. Let's break down each metric provided in this report:

1. **Lead Sources** - the number of Lead Sources provided by this Source. We use Lead Sources instead of Prospects to truly report on the number of inquires made. If a Prospect already exists in your system and they make another inquiry on your website, improveit 360 will create a new Lead Source to track that submission and ensure that no duplicate Prospect is created.
2. **Set** - the number of Appointments set for this Source regardless of the Appointment's Result.
3. **Canceled** - the number of the Appointments that were set but then were resulted as 'Canceled'.
4. **Issue** - the number of Appointments that were resulted as Sold, Demoed Not Sold, Follow Up, Not

- Demoed, One Leg, No Show or Not Run that have not been disregarded in statistics.
5. **Demo** - the number of Appointments that were resulted as Sold, Demoed Not Sold or Follow Up that have not been disregarded in statistics.
 6. **Sold** - the number of Appointments that were resulted as Sold that have not been disregarded in statistics.
 7. **Sold Price** - the dollar amount of all Sales created.
 8. **Issue %** - the percent of Lead Sources that became Issued Appointments.
 9. **Demo %** - the percent of Lead Sources that became Demoed Appointments.
 10. **Cancel %** - the percent of Lead Sources that became Canceled Appointments.
 11. **Sold %** - the percent of Lead Sources that became Sold Appointments.

While each summary level displays the metrics for each Source, the bottom of the report displays the grand total for time frame.

1.3 Marketing Opportunities

1.3.1 Marketing Opps due by Assigned To

The screenshot shows the 'Marketing Opps due by Assigned To' report in the improveit 360 system. The interface includes a navigation bar with various menu items like Home, Prospects, Lead Sources, Appointments, Sales, Projects, Staff Calendar, Production Grid, Reports, Dashboards, Campaigns, Call Queue, Appointment Manager, and Time Blocks Sync. The report title is 'Marketing Opps due by Assigned To' and the report generation status is 'Complete'.

Report Options:

- Summarize information by: Assigned To
- Show: All marketing opportunities
- Time Frame: Date Field: Due Date, Range: Custom, From: [], To: []

Buttons: Run Report, Hide Details, Customize, Save, Save As, Delete, Printable View, Export Details, Subscribe.

Filtered By: Edit
 Due Date less or equal TODAY Clear
 AND Completed Date equals Clear

Grouped By: Assigned To
 Sorted By: Assigned To

Prospect Name	Prospect Name	Marketing Opportunity Name	Marketing Opportunity Name	Type	Type Details	Due Date	Days Past Due	Comments	Can Contact by Phone	Can Contact by Email	Prospect: Phone 1	Prospect: Phone 2	Prospect: Phone 3	Prospect: Primary Email
Assigned To: Alex Carson (3 records)														
Renfro, Phyllis	Renfro, Phyllis	Set Appointment	Set Appointment	-	-	11/30/2016	181	This opportunity was automatically generated.	✓	✓	(614) 488-5756	-	-	phyllis@renfro.com
Slader, Nick	Slader, Nick	Set Appointment	Set Appointment	-	-	11/30/2016	181	This opportunity was automatically generated.	✓	✓	(614) 846-6945	-	-	nick@slader.com
Chimento, Daniela	Chimento, Daniela	Set Appointment	Set Appointment	-	-	11/30/2016	181	This opportunity was automatically generated.	✓	✓	(614) 249-1535	-	-	daniela@chimento.com
Assigned To: Alyssa Altz (1 record)														
Virgil, Bradley	Virgil, Bradley	Set Appointment	Set Appointment	-	-	11/30/2016	181	This opportunity was automatically generated.	✓	✓	(614) 895-5453	-	-	bradley@virgil.com
Assigned To: Chris Rice (3 records)														
Starkweather, Buford	Starkweather, Buford	Set Appointment	Set Appointment	-	-	11/30/2016	181	This opportunity was automatically generated.	✓	✓	(614) 267-8905	-	-	buford@starkweather.com
Croxford, Chester	Croxford, Chester	Set Appointment	Set Appointment	-	-	11/30/2016	181	This opportunity was automatically generated.	✓	✓	(614) 481-1790	-	-	chester@croxford.com
Lach, Randall	Lach, Randall	Set Appointment	Set Appointment	-	-	11/30/2016	181	This opportunity was automatically generated.	✓	✓	(614) 436-8614	-	-	randall@lach.com

This report provides you a look into all of the incomplete Marketing Opps in your system that are due, summarized by the User who is assigned. Use this report to monitor progress and ensure Marketing Opportunities are being completed.

1.3.2 Marketing Opps due by Type

Marketing Opps due by Type

Report Generation Status: Complete

Report Options:
 Summarize information by: Type | Show: All marketing opportunities | Time Frame: Date Field: Due Date | Range: Custom | From: | To: |

Buttons: Run Report, Hide Details, Customize, Save, Save As, Delete, Printable View, Export Details, Subscribe

Filtered By: Edit
 Due Date less or equal TODAY Clear
 AND Completed Date equals Clear

Grouped By: Type
 Sorted By: Type

Prospect: Prospect Name	Marketing Opportunity: Marketing Opportunity Name	Type Details	Assigned To	Due Date	Days Past Due	Comments	Can Contact by Phone	Can Contact by Email	Prospect: Phone 1	Prospect: Phone 2	Prospect: Phone 3	Prospect: Primary Email
Type: Set Appointment (3 records)												
Virgil, Bradley	Virgil, Bradley: Set Appointment	-	Alyssa Alto	11/30/2016	181	This opportunity was automatically generated.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	(614) 895-5453	-	-	bradlev@virgil.com
Slader, Nick	Slader, Nick: Set Appointment	-	Alex Carson	11/30/2016	181	This opportunity was automatically generated.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	(614) 846-6945	-	-	nick@slader.com
Crouford, Chester	Crouford, Chester: Set Appointment	-	Chris Rice	11/30/2016	181	This opportunity was automatically generated.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	(614) 481-1790	-	-	chester@crouford.com
Type: Rehash Appointment (5 records)												
Renfro, Phyllis	Renfro, Phyllis: Set Appointment	-	Alex Carson	11/30/2016	181	This opportunity was automatically generated.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	(614) 488-5758	-	-	phyllis@renfro.com
Starkweather, Buford	Starkweather, Buford: Set Appointment	-	Chris Rice	11/30/2016	181	This opportunity was automatically generated.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	(614) 267-8605	-	-	buford@starkweather.com
Dufour, Jenifer	Dufour, Jenifer: Set Appointment	-	Jack Slacker	11/30/2016	181	This opportunity was automatically generated.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	(614) 766-7093	-	-	jenifer@dufour.com
Caswell, Hal	Caswell, Hal: Set Appointment	-	Francis Babin	11/30/2016	181	This opportunity was automatically generated.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	(614) 864-9376	-	-	hal@caswell.com
Chimento, Daniela	Chimento, Daniela: Set Appointment	-	Alex Carson	11/30/2016	181	This opportunity was automatically generated.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	(614) 249-1535	-	-	daniela@chimento.com
Type: Follow-up Appointment (4 records)												
Griffie, Tammy	Griffie, Tammy: Set Appointment	-	Paul Nomers	11/30/2016	181	This opportunity was automatically generated.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	(614) 299-6447	-	-	tammy@griffie.com
Norskoog, Celeste	Norskoog, Celeste: Set Appointment	-	Paul Nomers	11/30/2016	181	This opportunity was automatically generated.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	(614) 463-9182	-	-	celeste@norskoog.com
Brentlinger, Quinton	Brentlinger, Quinton: Set Appointment	-	Jack Slacker	11/30/2016	181	This opportunity was automatically generated.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	(614) 481-8507	-	-	quinton@brentlinger.com
Lach, Randall	Lach, Randall: Set Appointment	-	Chris Rice	11/30/2016	181	This opportunity was automatically generated.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	(614) 436-8614	-	-	randall@lach.com
Grand Totals (12 records)												

Check rows to filter, then drill down by:

Confidential information - Do Not Distribute

This report provides you a look into all of the incomplete Marketing Opps in your system that are due, summarized by the Type. The Marketing Opportunity Type describes the purpose of the Marketing Opportunity. Use this report to monitor progress and ensure Marketing Opportunities are being completed.

1.3.3 Marketing Opps due with no phone number

Marketing Opps due with no phone number

Report Generation Status: Complete

Report Options:
 Summarize information by: Assigned To
 Show: All marketing opportunities
 Time Frame: Date Field: Due Date, Range: Custom

Run Report | Hide Details | Customize | Save | Save As | Delete | Printable View | Export Details | Subscribe

Filtered By: Edit
 Due Date less or equal TODAY Clear
 AND Completed Date equals Clear
 AND Can Contact by Phone equals False Clear

Grouped By: Assigned To
 Sorted By: Assigned To

Prospect: Prospect Name	Marketing Opportunity: Marketing Opportunity Name	Type	Type Details	Due Date	Days Past Due	Comments	Can Contact by Phone	Can Contact by Email	Prospect: Phone 1	Prospect: Phone 2	Prospect: Phone 3	Prospect: Primary Email
Assigned To: Alex Carson (1 record)												
Chimento, Daniela	Chimento, Daniela - Set Appointment	Rehash Appointment		11/30/2016	181	This opportunity was automatically generated.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	-	-	daniela@chimento.com
Assigned To: Chris Rice (1 record)												
Lach, Randall	Lach, Randall - Set Appointment	Follow-up Appointment		11/30/2016	181	This opportunity was automatically generated.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	-	-	randall@lach.com
Assigned To: Francis Bean (1 record)												
Caswell, Hal	Caswell, Hal - Set Appointment	Rehash Appointment		11/30/2016	181	This opportunity was automatically generated.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	-	-	hal@caswell.com
Assigned To: Jack Slacker (1 record)												
Brentlinger, Quinton	Brentlinger, Quinton - Set Appointment	Follow-up Appointment		11/30/2016	181	This opportunity was automatically generated.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	-	-	quinton@brentlinger.com

This report provides you a look into all of the incomplete Marketing Opps in your system that are due that do not have a callable phone number. Use this report to create a list of Prospects to add to an email or snail mail campaign.

1.4 Sources

1.4.1 Source Cost Performance

Source Cost Performance

Report generation complete.

Source Name	SOURCES WITH LEAD SOURCES W/O APT W/O SALE V2 Sources with Lead Sources w/o Ap block 1										SOURCES WITH SOURCE COSTS Sources with Source Costs block 2					
	Lead Sources	Set	Canceled	Issue	Demo	Sold	Price	Net	Net Amt	AVG Net Amount	Amount	Cost per Lead	Cost per Issue	Cost per Demo	Cost per Sale	ROI
Source Name: Email Blast	247	214	2	26	26	15	\$187,593.00	7	\$97,132.00	\$13,876.00	\$2,700.00	\$10.93	\$104	\$103.85	\$180.00	6.847.89%
Source Name: Home Depot	488	421	4	48	48	28	\$381,159.15	13	\$159,539.00	\$12,272.23	\$15,000.00	\$30.74	\$313	\$312.50	\$535.71	2.441.08%
Source Name: Internet Ad	248	209	5	18	18	11	\$143,158.00	5	\$76,604.00	\$15,320.80	\$1,250.00	\$5.04	\$89	\$89.44	\$113.64	11.352.64%
Source Name: Lowes	81	71	3	6	6	3	\$31,751.00	2	\$25,275.00	\$12,637.50	\$15,550.00	\$191.98	\$2.92	\$2,591.67	\$5,183.33	104.19%
Source Name: Paper Ad	78	71	0	9	9	5	\$57,613.00	2	\$21,642.00	\$10,821.00	\$1,250.00	\$16.03	\$139	\$138.89	\$250.00	4.509.04%
Source Name: Radio Commercial	170	146	5	16	16	11	\$155,975.00	7	\$107,131.00	\$15,304.43	\$4,500.00	\$26.47	\$281	\$281.25	\$409.09	3.366.11%
Source Name: TV Commercial	78	70	3	5	5	4	\$46,450.00	2	\$26,079.00	\$13,039.50	\$8,700.00	\$111.54	\$1,740	\$1,740.00	\$2,175.00	433.91%
Source Name: Walmart	85	73	0	11	11	6	\$96,295.00	2	\$35,706.00	\$17,853.00	\$2,100.00	\$24.42	\$191	\$190.91	\$350.00	4.485.48%
Source Name: Website - Free Estimate	4	4	0	2	2	2	\$5,895.00	0	\$0.00	\$0.00	\$250.00	\$62.50	\$125	\$125.00	\$125.00	2.258.00%
Grand Totals	1,480	1,279	22	141	141	85	\$1,105,889.15	40	\$540,108.00	\$13,727.70	\$51,300.00	\$34.66	\$364	\$363.83	\$603.53	2,055.73%

The Source Cost Performance report is the most accurate way of calculating your ROI [return on investment] within improveit 360. This 'joined' report utilizes two separate report types to bring you all of the Lead Sources created, Appointments set and Sold in a given time frame along with all Source Costs paid in a given time frame. These two pieces of data provides you important insight into your

marketing Sources performance such as:

1. **AVG Net Amount** - this formula displays the average dollar amount of all Sales in the 'Net' status for this given time frame.
2. **Cost per Lead** - the cost of each Lead Source gathered in this time frame based upon the Source Cost amount entered and the number of Lead Sources collected.
3. **Cost per Issue** - the cost of each Issued Appointment ran in this time frame based upon the Source Cost amount entered and the number of Appointments Issued.
4. **Cost per Demo** - the cost of each Demoed Appointment ran in this time frame based upon the Source Cost amount entered and the number of Appointments Demoed.
5. **Cost per Sale** - the cost of each Sale created in this time frame based upon the Source Cost amount entered and the number of Appointments resulted as Sold.
6. **ROI** - the return on investment for each Source calculated by subtracting the Source Cost Amount from the total Sold Price dollar and dividing the result by the Source Cost Amount.

Changing the time frame of a joined report

Joined reports do not allow you to change the time frame directly when running a report. To change the time frame follow these steps:

- Click 'Customize':

Report: Source Cost Performance

« Go to Report List

Run Report Show Details Report Properties **Customize** Delete Printable View Report generation complete.

Source Name	Lead Sources	Set	Canceled	Issue	Demo	Sold	Sold Price	Net	Net
Source Name: Email Blast	247	214	2	26	26	15	\$187,593.00	7	\$9
Source Name: Home Depot	488	421	4	48	48	28	\$381,159.15	13	\$15
Source Name: Internet Ad	248	209	5	18	18	11	\$143,158.00	5	\$7
Source Name: Lowe's	81	71	3	6	6	3	\$31,751.00	2	\$2
Source Name: Paper Ad	78	71	0	9	9	5	\$57,613.00	2	\$2
Source Name: Radio Commercial	170	146	5	16	16	11	\$155,975.00	7	\$10
Source Name: TV Commercial	78	70	3	5	5	4	\$46,450.00	2	\$2
Source Name: Walmart	86	73	0	11	11	6	\$96,295.00	2	\$3
Source Name: Website - Free Estimate	4	4	0	2	2	2	\$5,895.00	0	
Grand Totals	1,480	1,279	22	141	141	85	\$1,105,889.15	40	\$54

- Update the date range for both report types. Ensure that both report types match to ensure the most accurate report:

salesforce Search... Search

Report Type: Sources with Lead Sources w/o Appt w/o Sale v2
Source Cost Performance

Save Save As Close Report Properties Add Report Type Run Report

Fields All #

Quick Find

Drag and drop to add fields to the report.

COMMON FIELDS

- Formulas
 - Add Cross Block Formula
 - Cost per Sale
 - ROI
 - Cost per Lead
 - Cost per Demo
 - Cost per Issue
- Sources

Filters

Sources with Lead Sources w/o Ap block 1 Add

Show All sources

Date Field Taken On Range Current CY From 1/1/2017 To 12/31/2017

To add filters, click Add.

Sources with Source Costs block 2 Add

Show All sources

Date Field Paid On Range Current CY From 1/1/2017 To 12/31/2017

To add filters, click Add.

- Click 'Run Report':

salesforce Search... Search

Report Type: Sources with Lead Sources w/o Appt w/o Sale v2
Source Cost Performance

Save Save As Close Report Properties Run Report

Fields All #

Quick Find

Drag and drop to add fields to the report.

COMMON FIELDS

- Formulas
 - Add Cross Block Formula
 - Cost per Sale
 - ROI
 - Cost per Lead
 - Cost per Demo
 - Cost per Issue
- Sources

Filters

Sources with Lead Sources w/o Ap block 1 Add

Show All sources

Date Field Taken On Range Current CY From 1/1/2017 To 12/31/2017

To add filters, click Add.

Sources with Source Costs block 2 Add

Show All sources

Date Field Paid On Range Current CY From 1/1/2017 To 12/31/2017

To add filters, click Add.

1.5 Appointments

1.5.1 Tomorrow's Appointments

ABC HOME SERVICES Search... Search

Home Prospects Appointments Sales Projects Dashboards **Reports** First Time Setup Time Blocks Sync Documents

Tomorrow's Appointments

Report Generation Status: Complete

Report Options:

Summarize information by: Sales Rep 1 Show All appointments

Time Frame: Date Field Appointment Date Range Tomorrow From 3/3/2017 To 3/3/2017

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

Grouped By: Sales Rep 1 Sorted By: Sales Rep 1

Appointment Date	Appointment Time	Appointment: Appointment Name	Confirmed	Confirmed By	Result	Comments
<input type="checkbox"/> Sales Rep 1: Alex Carson (3 records)						
3/3/2017	9:00 AM	Brendon, Harlan Basement Remodel	<input type="checkbox"/>		-	AM1 CLE Basement
3/3/2017	1:00 PM	Bylund, Kathi Windows & Doors	<input type="checkbox"/>		-	PM1 CLE WD
3/3/2017	4:00 PM	Medlen, Cora Basement Remodel	<input type="checkbox"/>		-	PM2 CLE Basement
<input type="checkbox"/> Sales Rep 1: Anna Jefferson (3 records)						
3/3/2017	9:00 AM	Brazinski, Boris Bath Remodel	<input type="checkbox"/>		-	AM1 COL Bath
3/3/2017	1:00 PM	Charney, Alphonso Bath Remodel	<input type="checkbox"/>		-	PM1 COL Bath
3/3/2017	4:00 PM	Erbstein, Rickey Bath Remodel	<input type="checkbox"/>		-	PM2 COL Bath
<input type="checkbox"/> Sales Rep 1: Cece Jackson (3 records)						
3/3/2017	9:00 AM	Esselman, Latrice Basement Remodel	<input type="checkbox"/>		-	AM1 CLE Basement
3/3/2017	1:00 PM	Colwell, Ezequiel Basement Remodel	<input type="checkbox"/>		-	PM1 CLE Basement
3/3/2017	4:00 PM	Mclauchlin, Malinda Basement Remodel	<input type="checkbox"/>		-	PM2 CLE Basement

This report gives you a quick look at the Appointments set to be run the next day. The date range of this report is set to 'Tomorrow' and will always display Appointments set to be run the next day.

1.5.2 Appointment Performance Year over Year

ABC HOME SERVICES

Search... Search

Home Prospects Appointments Sales Projects Dashboards **Reports** First Time Setup Time Blocks Sync Documents +

Appointment Performance Year over Year

Report Generation Status: Complete

Report Options:

Summarize information by: Sales Rep 1: Staff Name Summarize information by: Appointment Date Show: All appointments

Time Frame: Date Field: Appointment Date Range: Current and Previous CY From: 1/1/2016 To: 12/31/2017

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: Edit Result not equal to Clear

Sales Rep 1: Staff Name		Appointment Date		Grand Total
		CY2016	CY2017	
Alex Carson	Sum of Set	720	42	762
	Sum of Canceled	0	0	0
	Sum of Issue	720	42	762
	Sum of Demo	720	42	762
	Sum of Sold	576	33	609
	Sum of Sold Price	\$7,773,911.00	\$443,317.00	\$8,217,228.00
	Close % (Issued)	80.00%	78.57%	79.92%
Anna Jefferson	Sum of Set	720	42	762
	Sum of Canceled	360	21	381
	Sum of Issue	360	21	381
	Sum of Demo	360	21	381
	Sum of Sold	360	21	381
	Sum of Sold Price	\$4,726,673.00	\$261,810.00	\$4,988,383.00
	Close % (Issued)	100.00%	100.00%	100.00%
Cece Jackson	Sum of Set	720	42	762
	Sum of Canceled	0	0	0
	Sum of Issue	720	42	762
	Sum of Demo	720	42	762
	Sum of Sold	360	21	381
	Sum of Sold Price	\$4,753,290.00	\$281,967.00	\$5,035,257.00
	Close % (Issued)	50.00%	50.00%	50.00%
Chris Rice	Sum of Set	0	2	2
	Sum of Canceled	0	0	0
	Sum of Issue	0	2	2
	Sum of Demo	0	2	2
	Sum of Sold	0	1	1
	Sum of Sold Price	\$0.00	\$2,932.15	\$2,932.15
	Close % (Issued)		50.00%	50.00%

This report, displayed in the 'matrix' format, gives you an overview of your Sales Reps performance year over year. Each set of metrics is displayed in a CY [calendar year] block making it simple to compare numbers from the previous year to the current year. Each block reports the following information:

1. **Set** - the number of Appointments set for this Sales Rep regardless of the Appointment's Result.
2. **Canceled** - the number of the Appointments that were set but then were resulted as 'Canceled'.
3. **Issue** - the number of Appointments that were resulted as Sold, Demoed Not Sold, Follow Up, Not Demoed, One Leg, No Show or Not Run that have not been disregarded in statistics.
4. **Demo** - the number of Appointments that were resulted as Sold, Demoed Not Sold or Follow Up that have not been disregarded in statistics.
5. **Sold** - the number of Appointments that were resulted as Sold that have not been disregarded in statistics.
6. **Sold Price** - the dollar amount of all Sales created.
7. **Close % (Issued)** - the percent of Issued Appointments that were resulted as Sold. improveit 360 also offers another 'Close %' formula out-of-the-box based of Appointments that have been demoed. Click 'Customize' to drag the 'Close % (Demo)' formula into the report.

1.5.3 Appointment Performance by Rep - YTD

ABC HOME SERVICES Search... Search

Home Prospects Appointments Sales Projects Dashboards **Reports** First Time Setup Time Blocks Sync Documents +

Appointment Performance by Rep - YTD

Report Generation Status: Complete

Report Options:

Summarize information by: Sales Rep 1: Staff Name Show All appointments

Time Frame: Date Field Appointment Date Range: Current CY From 1/1/2017 To 12/31/2017

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe

Grouped By: Sales Rep 1: Staff Name Sorted By: Sum of Sold +

	Set	Canceled	Issue	Demo	Sold	Sold Price	Demo %	Issue %	Cancel %	Close % (Issued)	Close % (Demo)
Sales Rep 1: Staff Name: Varun Ganti (855 records)	855	0	762	762	610	\$8,159,054.00	100.00%	89.12%	0.00%	80.05%	80.05%
Sales Rep 1: Staff Name: Joe Producer (854 records)	854	0	762	762	610	\$8,123,427.00	100.00%	89.23%	0.00%	80.05%	80.05%
Sales Rep 1: Staff Name: Alex Carson (856 records)	856	0	762	762	609	\$8,217,228.00	100.00%	89.02%	0.00%	79.92%	79.92%
Sales Rep 1: Staff Name: Quinn Turner (855 records)	855	381	381	381	381	\$5,067,625.00	100.00%	44.56%	44.56%	100.00%	100.00%
Sales Rep 1: Staff Name: Jack Slacker (854 records)	854	0	762	762	381	\$5,018,761.00	100.00%	89.23%	0.00%	50.00%	50.00%
Sales Rep 1: Staff Name: Francis Bean (855 records)	855	381	381	381	381	\$5,021,396.00	100.00%	44.56%	44.56%	100.00%	100.00%
Sales Rep 1: Staff Name: Danny Nevada (855 records)	855	0	762	762	381	\$5,013,980.00	100.00%	89.12%	0.00%	50.00%	50.00%
Sales Rep 1: Staff Name: Cace Jackson (857 records)	857	0	762	762	381	\$5,035,257.00	100.00%	88.91%	0.00%	50.00%	50.00%
Sales Rep 1: Staff Name: Anna Jefferson (851 records)	851	381	381	381	381	\$4,988,383.00	100.00%	44.77%	44.77%	100.00%	100.00%
Sales Rep 1: Staff Name: John Doe (855 records)	855	76	686	686	305	\$3,817,874.00	100.00%	80.23%	8.89%	44.46%	44.46%

This report provides a high-level overview of your Sales Reps performance during the current calendar year. For each of your Sales Reps you can quickly determine the following information:

1. **Set** - the number of Appointments set for this Sales Rep regardless of the Appointment's Result.
2. **Canceled** - the number of the Appointments that were set but then were resulted as 'Canceled'.
3. **Issue** - the number of Appointments that were resulted as Sold, Demoed Not Sold, Follow Up, Not Demoed, One Leg, No Show or Not Run that have not been disregarded in statistics.
4. **Demo** - the number of Appointments that were resulted as Sold, Demoed Not Sold or Follow Up that have not been disregarded in statistics.
5. **Sold** - the number of Appointments that were resulted as Sold that have not been disregarded in statistics.
6. **Sold Price** - the dollar amount of all Sales created.

7. **Demo %** - the percent of Appointments Set that became Demoed Appointments.
8. **Issue %** - the percent of Appointments Set that became Issued Appointments.
9. **Cancel %** - the percent of Appointments Set that became Canceled Appointments.
10. **Sold %** - the percent of Appointments Set that became Sold Appointments.
11. **Close % (Issued)** - the percent of Issued Appointments that were resulted as Sold.
12. **Close % (Demo)** - the percent of Demoed Appointments that were resulted as Sold.

1.5.4 All Un-Resulted Appointments

ABC HOME SERVICES

Search... Search

Home Prospects Appointments Sales Projects Dashboards **Reports** First Time Setup Time Blocks Sync Documents

All Un-Resulted Appointments

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame
Date Field Range
From To

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: [Edit](#)
Result equals [Clear](#)
AND Appointment Date less or equal TODAY [Clear](#)

Grouped By:
Sorted By:

Appointment Date	Appointment Time	Appointment: Appointment Name	Interested In	Comments
<input type="checkbox"/> Sales Rep 1: (2 records)				
3/29/2017	8:00 AM	Marotz, Leigh Closets	Closets	-
5/11/2017	2:00 PM	Adjei, Danna Basement Remodel	Basement Remodel	-
<input type="checkbox"/> Sales Rep 1: Alex Carson (94 records)				
1/20/2017	1:00 PM	Sayyed, German Windows & Doors	Windows & Doors	PM1 CLE WD
1/24/2017	9:00 AM	Deglow, Elvira Basement Remodel	Basement Remodel	AM1 CLE Basement
1/31/2017	9:00 AM	Kubeika, Wilford Basement Remodel	Basement Remodel	AM1 CLE Basement
2/2/2017	1:00 PM	Witman, Charlotte Windows & Doors	Windows & Doors	PM1 CLE WD
1/20/2017	4:00 PM	Kaawa, Maritza Basement Remodel	Basement Remodel	PM2 CLE Basement
1/24/2017	1:00 PM	Kaur, Erik Windows & Doors	Windows & Doors	PM1 CLE WD

This report displays all of the Appointments run in the past with no result summarized by Sales Rep 1. This is the perfect report to share with your Sales team to keep them up to date with all of the Appointments they have yet to result. Resulting Appointments is a critical step in keeping your data up to date and to ensure nothing slips through the cracks. While the improveit 360 Go mobile app makes it easy to result Appointments in real-time from the field, keeping all un-resulted Appointments

in front of your Sales Reps is another tool to ensure all Appointments are resulted.

1.6 Quotes

1.6.1 Quotes - Expiring Next 7 Days

Quotes - Expiring Next 7 Days

Report Generation Status: Complete

Report Options:

Summarize information by: Sales Rep 1 Show All appointments

Time Frame

Date Field: Valid Until Range: Custom

From: To:

Run Report
Hide Details
Customize
Save
Save As
Delete
Printable View
Export Details
Subscribe

Filtered By: [Edit](#)
Valid Until equals NEXT 7 DAYS [Clear](#)


Grouped By: Sales Rep 1
Sorted By: Sales Rep 1

Prospect	Prospect Phone	Appointment Date	Quote: Quote Name	Quote Number	Valid Until	Total	Status
Sales Rep 1: Danny Nevada (1 record)							\$18,220.00
Lacatena, Bruno	(513) 721-9178	1/18/2016	Lacatena, Blinds	Q30443	6/3/2017	\$18,220.00	Proposed
Sales Rep 1: Francis Bean (1 record)							\$13,777.00
Abair, Abby	(216) 444-3459	8/16/2016	Abair, Basement Remodel	Q35389	6/1/2017	\$13,777.00	Proposed
Sales Rep 1: Hannah Bunch (1 record)							\$13,557.00
Abascal, Wally	(513) 681-1074	5/24/2016	Abascal, Kitchen	Q33232	5/31/2017	\$13,557.00	Proposed
Sales Rep 1: Holly Woods (1 record)							\$18,469.00
Hadsell, Fernando	(216) 431-2564	9/15/2016	Hadsell, Windows & Doors	Q36680	6/2/2017	\$18,469.00	Proposed
Sales Rep 1: John Doe (1 record)							\$17,530.00
Labrada, Stuart	(614) 846-7697	5/30/2016	Labrada, Bath Remodel	Q33356	6/1/2017	\$17,530.00	Proposed
Grand Totals (5 records)						\$81,553.00	

Check rows to filter, then drill down by: --None-- Drill Down

This report lists all Quotes in your system with a 'Valid Until' date within the next 7 days summarized by Sales Rep 1. This is a great tool for you and your Sales Reps to use to get an idea of Quotes that have yet to be accepted that are going to expire in the next week.

1.6.2 Quotes - Proposed



ABC HOME SERVICES

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid Reports Dashboards

Quotes - Proposed

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame

Date Field: Range:

From: To:

Filtered By: [Edit](#)
Status equals Proposed [Clear](#)

Grouped By:
 Sorted By:

Prospect	Quote: Quote Name	Quote Number	Valid Until	Total	Status
Sales Rep 1: Alex Carson (9 records)					\$112,560.00
Henshall, Mason	Henshall, Basement Remodel	Q29802	-	\$11,536.00	Proposed
Flaten, Carmine	Flaten, Basement Remodel	Q29814	-	\$12,580.00	Proposed
Lynk, Marta	Lynk, Windows & Doors	Q29826	-	\$9,872.00	Proposed
Finocchiaro, Roberto	Finocchiaro, Basement Remodel	Q29838	-	\$18,911.00	Proposed
Kubish, Thanh	Kubish, Basement Remodel	Q29850	-	\$19,662.00	Proposed
Sniffen, Penny	Sniffen, Windows & Doors	Q29862	-	\$6,215.00	Proposed
Galt, Noble	Galt, Basement Remodel	Q29874	-	\$12,055.00	Proposed
Hougham, Mellissa	Hougham, Basement Remodel	Q29886	-	\$12,008.00	Proposed
Rosborough, Jennifer	Rosborough, Windows & Doors	Q29898	-	\$9,721.00	Proposed
Sales Rep 1: Anna Jefferson (9 records)					\$120,253.00
Lynk, Marta	Lynk, Windows & Doors	Q29826	-	\$9,872.00	Proposed
Finocchiaro, Roberto	Finocchiaro, Basement Remodel	Q29838	-	\$18,911.00	Proposed
Kubish, Thanh	Kubish, Basement Remodel	Q29850	-	\$19,662.00	Proposed
Sniffen, Penny	Sniffen, Windows & Doors	Q29862	-	\$6,215.00	Proposed
Galt, Noble	Galt, Basement Remodel	Q29874	-	\$12,055.00	Proposed
Hougham, Mellissa	Hougham, Basement Remodel	Q29886	-	\$12,008.00	Proposed
Rosborough, Jennifer	Rosborough, Windows & Doors	Q29898	-	\$9,721.00	Proposed

This report displays all of the Quotes in your system with the 'Status' of 'Proposed' giving you and your Sales Reps insight into all outstanding Quotes that have yet to be accepted.

1.6.3 Quotes by Status

ABC HOME SERVICES Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards

Quotes by Status

Report Generation Status: Complete

Report Options:

Summarize information by: Status Show All appointments

Time Frame: Date Field Valid Until Range Custom From To

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe


Grouped By: Status Sorted By: Status ↑

- Status: Proposed (9,432 records)
- Status: Accepted (1 record)
- Grand Totals (9,433 records)**

Check rows to filter, then drill down by: --None-- Drill Down

This report displays all of the Quotes in your system summarized by their 'Status' giving you a high-level look at how many Quotes have been proposed, accepted and rejected in your system.

1.6.4 Quotes by Template



ABC HOME SERVICES

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Prod

Quotes by Template

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame

Date Field

Appointment Date

Grouped By: Status

Sorted By: >

	Total
<input type="checkbox"/> Quote Template: <u>Door Template</u> (3,023 records)	\$39,140,959.00
Status: Proposed (2,033 records)	\$26,577,888.00
Status: Accepted (919 records)	\$11,658,193.00
Status: Rejected (71 records)	\$904,878.00
<input type="checkbox"/> Quote Template: <u>Roofing Template</u> (1,082 records)	\$13,982,818.00
Status: Proposed (861 records)	\$11,126,271.00
Status: Accepted (132 records)	\$1,676,775.00
Status: Rejected (89 records)	\$1,179,772.00
<input type="checkbox"/> Quote Template: <u>Window Template</u> (5,435 records)	\$70,016,682.00
Status: Proposed (1,613 records)	\$20,941,097.00
Status: Accepted (2,623 records)	\$33,785,724.00
Status: Rejected (1,199 records)	\$15,289,861.00
Grand Totals (9,540 records)	\$123,140,459.00

Check rows to filter, then drill down by:

Taking our Quote reporting a step further, this report summarizes all of the Quotes in your system by their Status and by any Quote Template used. This report helps visualize the Quotes in your system and which products may be performing better than others.

1.7 Sales

1.7.1 Sales Efficiency by Rep

ABC HOME SERVICES | Search... | 1360 Demo2 | Setup

Home | Prospects | Lead Sources | Appointments | Sales | Projects | Staff Calendar | Production Grid | **Reports** | Dashboards | Campaigns | Call Queue | Appointment Manager | Time Blocks Sync

Sales Efficiency by Rep

Report Generation Status: Complete

Report Options:

Summarize information by: Sales Rep 1: Staff Name | Show: All appointments | Time Frame: Appointment Date | Range: Custom

Run Report | Show Details | Customize | Save | Save As | Delete | Printable View | Export Details | Subscribe

Filtered By: Edit | Result not equal to Clear | AND Disregard in Statistics equals False Clear

Grouped By: Sales Rep 1: Staff Name | Sorted By: Sales Rep 1: Staff Name

	Set	Issue	Demo	Sold	Sold Price	Working	Working Amt	Net	Net Amt	Canceled	Canceled Amt	Sold %	Net %	Avg Sold Amt	NSP	NSLI
Sales Rep 1: Staff Name: Alex Carson (118 records)	118	118	118	95	\$1,202,010.00	6	\$61,202.00	89	\$1,140,808.00	0	\$0.00	81%	94%	\$12,008.51	75.42%	\$9,667.86
Sales Rep 1: Staff Name: Anna Jefferson (117 records)	117	59	59	59	\$756,224.00	3	\$32,624.00	56	\$723,600.00	0	\$0.00	50%	95%	\$12,264.41	94.92%	\$12,264.41
Sales Rep 1: Staff Name: Cace Jackson (117 records)	117	117	117	59	\$778,232.00	3	\$34,954.00	56	\$743,278.00	0	\$0.00	50%	95%	\$12,597.93	47.86%	\$6,352.80
Sales Rep 1: Staff Name: Danny Nevada (117 records)	117	117	117	58	\$775,058.00	3	\$35,232.00	55	\$739,826.00	0	\$0.00	50%	95%	\$12,755.62	47.01%	\$6,323.30
Sales Rep 1: Staff Name: Francis Bean (117 records)	117	58	58	58	\$841,940.00	3	\$40,203.00	55	\$801,737.00	0	\$0.00	50%	95%	\$13,823.05	94.83%	\$13,823.05
Sales Rep 1: Staff Name: Hannah Bunch (117 records)	117	106	106	47	\$665,384.00	3	\$49,538.00	44	\$615,846.00	0	\$0.00	40%	94%	\$13,103.11	41.51%	\$5,809.87
Sales Rep 1: Staff Name: Holly Woods (117 records)	117	105	105	47	\$606,082.00	2	\$19,426.00	45	\$586,656.00	0	\$0.00	40%	96%	\$12,482.04	42.86%	\$5,587.20
Sales Rep 1: Staff Name: Jack Stackler (117 records)	117	117	117	58	\$749,266.00	3	\$46,610.00	55	\$702,656.00	0	\$0.00	50%	95%	\$12,114.76	47.01%	\$6,005.61

Our standard Sales Efficiency report by Rep offers a host of KPI's on how your Sales Reps are performing including the following metrics:

1. **Set** - the number of Appointments set for this Sales Rep regardless of the Appointment's Result.
2. **Issue** - the number of Appointments that were resulted as Sold, Demoed Not Sold, Follow Up, Not Demoed, One Leg, No Show or Not Run that have not been disregarded in statistics.
3. **Demo** - the number of Appointments that were resulted as Sold, Demoed Not Sold or Follow Up that have not been disregarded in statistics.
4. **Sold** - the number of Appointments that were resulted as Sold that have not been disregarded in statistics.
5. **Sold Price** - the dollar amount of all Sales created.
6. **Working** - the number of Sales in the 'Working' status, indicating that the Sale is new and has yet to be approved and move past the rescission period.
7. **Working Amt** - the dollar amount of Sales in the 'Working' status.
8. **Net** - the number of Sales in the 'Net' status, indicating the Sale has moved passed the rescission

period and your company's approval process.

9. **Net Amt** - the dollar amount of Sales in the 'Net' status.
10. **Canceled** - the number of Sales that have been marked as canceled.
11. **Canceled Amt** - the dollar amount of Sales in the 'Canceled' status.
12. **Sold %** - the percentage of Set Appointments that have sold.
13. **Net %** - the percentage of Sales that have been moved to the 'Net' Status.
14. **Avg Sold Amt** - the average Sold Price of all Net Sales within the reports time frame.
15. **NSP (Net Sold Percentage)** - the percentage of Issued Appointments that have been resulted as Sold and moved to the Net Status.
16. **NSLI (Net Sale per Lead Issued)** - this formula represents the dollar amount attributed to the net revenue attributed to each Issued Appointment.

1.7.2 Sales by Product Category

ABC HOME SERVICES Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards

Sales by Product Category

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame: Date Field Range
 From To

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: [Edit](#)
 Canceled On equals [Clear](#)

Grouped By:
 Sorted By:

	Quantity	Item Total	AVG Unit Price
<input type="checkbox"/> Product Category: Closets (738 records)	738.00	\$9,705,075.00	\$13,150.51
<input type="checkbox"/> Product Category: Kitchen (214 records)	214.00	\$2,909,318.00	\$13,594.94
<input type="checkbox"/> Product Category: Blinds (619 records)	619.00	\$8,330,048.00	\$13,457.27
<input type="checkbox"/> Product Category: Basement Remodel (1,072 records)	1,072.00	\$14,127,355.00	\$13,178.50
<input type="checkbox"/> Product Category: Bath Remodel (643 records)	643.00	\$8,604,703.00	\$13,382.12
<input type="checkbox"/> Product Category: Windows & Doors (1,427 records)	1,427.00	\$18,933,079.00	\$13,267.75
<input type="checkbox"/> Product Category: Windows (1 record)	10.00	\$8,900.00	\$890.00
Grand Totals (4,714 records)	4,723.00	\$62,618,478.00	\$13,281.81

Check rows to filter, then drill down by: [Drill Down](#)

For Users not tracking Products in improveit 360, Sales by Product Category offers a high-level overview of the Quantity, Item Total [total dollar amount sold per item] and the average Unit Price for all of the Product Categories you offer. This report offers a glimpse into your highest performing Product Categories as well as a look into the average dollar amount each unit has been sold for.

1.7.3 Sales by Month by Rep YTD

ABC HOME SERVICES

Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards Campaigns Call Queue Appointment Manager Time Blocks Sync

Sales by Month by Rep YTD

Report Generation Status: Complete

Report Options:

Summarize information by: Sales Rep 1 Summarize information by: Sold On Show: All sales

Time Frame: Date Field: Sold On Range: Current CY From: 1/1/2016 To: 12/31/2016

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe

Sales Rep 1		January 2016	February 2016	March 2016	April 2016	May 2016	June 2016	July 2016	August 2016	September 2016	October 2016	November 2016	December 2016	Grand Total
<input type="checkbox"/> Alex Carson	Sum of Sold Price	\$645,242.00	\$658,615.00	\$710,374.00	\$669,849.00	\$735,469.00	\$690,692.00	\$707,523.00	\$748,881.00	\$706,042.00	\$619,284.00	\$646,505.00	\$8,900.00	\$7,547,376.00
	% Volume	11.91%	11.91%	12.14%	12.19%	12.48%	12.06%	12.81%	11.97%	12.29%	11.05%	11.79%	100.00%	573
	Total Sales	51	50	55	51	53	52	51	55	53	50	51	1	
<input type="checkbox"/> Anna Jefferson	Sum of Sold Price	\$448,859.00	\$391,596.00	\$456,595.00	\$416,732.00	\$429,778.00	\$422,308.00	\$429,193.00	\$497,999.00	\$411,015.00	\$419,541.00	\$397,348.00	\$0.00	\$4,720,964.00
	% Volume	8.29%	7.08%	7.80%	7.59%	7.29%	7.37%	7.65%	7.96%	7.15%	7.49%	7.25%	0.00%	357
	Total Sales	31	32	34	32	33	33	31	35	33	31	32		
<input type="checkbox"/> Cece Jackson	Sum of Sold Price	\$410,246.00	\$463,000.00	\$432,931.00	\$405,603.00	\$390,253.00	\$417,714.00	\$402,181.00	\$467,610.00	\$434,083.00	\$417,984.00	\$421,572.00	\$0.00	\$4,663,377.00
	% Volume	7.57%	8.37%	7.40%	7.39%	6.62%	7.29%	7.17%	7.47%	7.55%	7.46%	7.69%	0.00%	357
	Total Sales	31	32	34	32	33	33	31	35	33	31	32		
<input type="checkbox"/> Danny Nevada	Sum of Sold Price	\$438,025.00	\$441,306.00	\$454,163.00	\$442,035.00	\$455,908.00	\$443,080.00	\$435,013.00	\$468,788.00	\$420,687.00	\$435,482.00	\$402,119.00	\$0.00	\$4,836,606.00
	% Volume	8.09%	7.98%	7.76%	8.05%	7.74%	7.74%	7.75%	7.49%	7.32%	7.77%	7.34%	0.00%	357
	Total Sales	32	31	35	31	33	33	32	34	33	32	31		
<input type="checkbox"/> Francis Bean	Sum of Sold Price	\$420,981.00	\$417,946.00	\$442,793.00	\$436,504.00	\$462,920.00	\$426,906.00	\$442,361.00	\$460,514.00	\$422,641.00	\$466,987.00	\$447,570.00	\$0.00	\$4,848,123.00
	% Volume	7.77%	7.56%	7.57%	7.95%	7.85%	7.45%	7.89%	7.36%	7.36%	8.34%	8.16%	0.00%	357
	Total Sales	32	31	35	31	33	33	32	34	33	32	31		
<input type="checkbox"/> Hannah Bunch	Sum of Sold Price	\$340,883.00	\$299,735.00	\$400,760.00	\$310,225.00	\$313,553.00	\$340,263.00	\$360,883.00	\$398,384.00	\$341,195.00	\$355,692.00	\$356,332.00	\$0.00	\$3,817,885.00
	% Volume	6.29%	5.42%	6.85%	5.65%	5.32%	5.94%	6.43%	6.37%	5.94%	6.35%	6.50%	0.00%	288
	Total Sales	26	24	28	25	27	26	26	27	26	26	25		
<input type="checkbox"/> Holly Woods	Sum of Sold Price	\$309,333.00	\$382,749.00	\$346,141.00	\$339,474.00	\$310,455.00	\$354,512.00	\$286,009.00	\$377,865.00	\$402,747.00	\$322,147.00	\$324,742.00	\$0.00	\$3,756,174.00
	% Volume	5.71%	6.92%	5.92%	6.18%	5.27%	6.19%	5.10%	6.04%	7.01%	5.75%	5.92%	0.00%	285
	Total Sales	24	26	27	26	26	27	24	28	27	25	25		
<input type="checkbox"/> Jack Stacker	Sum of Sold Price	\$409,933.00	\$404,853.00	\$441,071.00	\$425,886.00	\$480,763.00	\$437,293.00	\$441,231.00	\$440,858.00	\$434,831.00	\$414,659.00	\$386,367.00	\$0.00	\$4,717,745.00
	% Volume	7.57%	7.32%	7.54%	7.75%	8.16%	7.64%	7.87%	7.09%	7.57%	7.40%	7.05%	0.00%	357
	Total Sales	32	31	35	31	33	33	32	34	33	32	31		
<input type="checkbox"/> Joe Producer	Sum of Sold Price	\$625,868.00	\$638,392.00	\$728,180.00	\$660,104.00	\$800,647.00	\$694,043.00	\$627,162.00	\$795,478.00	\$722,343.00	\$673,979.00	\$638,953.00	\$0.00	\$7,605,149.00
	% Volume	11.55%	11.55%	12.45%	12.01%	13.58%	12.12%	11.18%	12.72%	12.57%	12.03%	11.66%	0.00%	571
	Total Sales	50	51	55	50	53	53	50	55	53	51	50		

This matrix report offers a month by month view of your Sales Reps performance allowing you to visualize each reps total sold dollars (Sum of Sold Price), the total number of Sales and the percent they contributed to the total volume brought in the time frame.

1.7.4 Sales Not Net - 7+ Days

ABC HOME SERVICES Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards

Sales Not Net - 7+ Days

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame: Date Field Range From To

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: [Edit](#)
 Sold On less than **LAST 7 DAYS** [Clear](#)
 AND Status equals **Working** [Clear](#)

Grouped By: Sale: Sale Name
 Sorted By:

	Sold Price	Sale Age	Sold Price
<input type="checkbox"/> Sale: Sale Name: Basement Remodel : Borum, Abel (1 record)	\$14,494.00	183	14,494.00
<input type="checkbox"/> Sale: Sale Name: Basement Remodel : Fedorek, Elma (1 record)	\$20,814.00	182	20,814.00
<input type="checkbox"/> Sale: Sale Name: Basement Remodel : Gundy, Elvira (1 record)	\$7,461.00	183	7,461.00
<input type="checkbox"/> Sale: Sale Name: Basement Remodel : Kubeika, Wilford (1 record)	\$6,062.00	182	6,062.00
<input type="checkbox"/> Sale: Sale Name: Basement Remodel : Pallerino, Xavier (1 record)	\$7,835.00	183	7,835.00
<input type="checkbox"/> Sale: Sale Name: Basement Remodel : Shullick, Hollie (1 record)	\$13,149.00	183	13,149.00
<input type="checkbox"/> Sale: Sale Name: Basement Remodel : Stan, Vincent (1 record)	\$15,432.00	182	15,432.00

This report allows you to monitor the Sales with a 'Sold On' date in the last 7 days which have yet to be marked as 'Net'. Along with the Sold Price, this report provides you the 'Age' of the Sale in days to ensure all of your Sales are kept up to date.

1.7.5 Projects Completed not yet Paid in Full

ABC HOME SERVICES Search...

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards Campaigns Call Queue Appointment

Projects Completed not yet Paid in Full

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame: Date Field Range From To

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: [Edit](#)
 Status equals Completed [Clear](#)
 AND Sale: Balance Due not equal to 0 [Clear](#)
 AND Sale: Canceled On equals [Clear](#)
 AND Sale: Status not equal to Canceled, Paid In Full, Final [Clear](#)

Grouped By:
 Sorted By:

Prospect	Project: Project Name	Project Completed Date	Sale Status	Sale: Payment Type	Sale: Sold On	Sale: Comments	Sale: Balance Due	Sale: Sold Price
<input type="checkbox"/> Sale: Sale Name: Basement Remodel : Agne, Octavio (1 record)							\$3,447.00	\$19,150.00
Agne, Octavio	Basement Remodel : Agne, Octavio	7/31/2016	Net	-	7/14/2016	-	\$3,447.00	\$19,150.00
<input type="checkbox"/> Sale: Sale Name: Basement Remodel : Angevine, Arleen (1 record)							\$3,603.00	\$18,014.00
Angevine, Arleen	Basement Remodel : Angevine, Arleen	11/19/2016	Net	-	11/2/2016	-	\$3,603.00	\$18,014.00
<input type="checkbox"/> Sale: Sale Name: Basement Remodel : Baskette, Ruth (1 record)							\$4,756.00	\$8,492.00
Baskette, Ruth	Basement Remodel : Baskette, Ruth	7/14/2016	Net	-	6/27/2016	-	\$4,756.00	\$8,492.00
<input type="checkbox"/> Sale: Sale Name: Basement Remodel : Bau, Eleanor (1 record)							\$8,180.00	\$14,607.00
Bau, Eleanor	Basement Remodel : Bau, Eleanor	4/14/2016	Net	-	3/28/2016	-	\$8,180.00	\$14,607.00
<input type="checkbox"/> Sale: Sale Name: Basement Remodel : Blair, Crystal (1 record)							\$461.00	\$9,212.00
Blair, Crystal	Basement Remodel : Blair, Crystal	2/29/2016	Net	-	2/12/2016	-	\$461.00	\$9,212.00

This report lists all of the Projects that have been completed that still have a balance remaining to be paid on the associated Sale. This is a great tool to use to measure any outstanding balances that need to be collected.

1.7.6 Product Sales YTD

ABC HOME SERVICES Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards

Product Sales YTD

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame: Date Field Range
 From To

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: [Edit](#)
 Canceled On equals [Clear](#)

Grouped By:
 Sorted By:

	Quantity	Item Total	AVG Unit Price	Volume %
<input type="checkbox"/> Product: Standard for Stabilization & Structural Work i.e., Piers, Beam & Column, etc. (1 record)	5.00	\$12,500.00	\$2,500.00	6%
<input type="checkbox"/> Product: Replacement Window Series 7500 (2 records)	35.00	\$14,271.50	\$552.43	41%
<input type="checkbox"/> Product: Radon in water removal system (1 record)	5.00	\$6,000.00	\$1,200.00	6%
<input type="checkbox"/> Product: Okna Window (1 record)	15.00	\$8,670.00	\$578.00	17%
<input type="checkbox"/> Product: New Crack Injection Repair - INTERIOR (Clean Crack), Up to 5'-0" (1 record)	15.00	\$4,950.00	\$330.00	17%
<input type="checkbox"/> Product: Double-Hung Window (1 record)	10.00	\$5,250.00	\$525.00	12%
<input type="checkbox"/> Product: Bathroom Replacement & Remodel (1 record)	1.00	\$15,792.50	\$15,792.50	1%
Grand Totals (8 records)	86.00	\$67,434.00	\$2,753.80	

Check rows to filter, then drill down by: [Drill Down](#)

Product Sales YTD provides a look into all Products sold during the current calendar year. At a glance, you can see that total quantity sold, the total dollar amount sold, the average unit price and the percent each product contributed to the total volume sold.

1.7.7 Collections by Month YTD

Collections by Month YTD

Report Generation Status: Complete

Report Options:

Summarize information by: Type Detail
Summarize information by: Received
Show: All sales

Time Frame:
Date Field: Received
Range: Current CY
From: 1/1/2017 To: 12/31/2017

Filtered By: Edit
Type equals Payment, Deposit Clear

Sum of Amount	Received											Grand Total
Type Detail	January 2016	February 2016	March 2016	April 2016	May 2016	June 2016	July 2016	August 2016	September 2016	October 2016	November 2016	Grand Total
Payment	\$5,384,908.00	\$3,827,779.00	\$1,412,077.00	\$0.00	\$0.00	\$694,063.00	\$2,803,250.00	\$465,195.00	\$4,645,098.00	\$5,568,356.00	\$406,167.00	\$25,206,893.00
Deposit	\$0.00	\$1,681,539.00	\$4,383,342.00	\$5,451,074.00	\$5,832,243.00	\$4,978,270.00	\$2,767,109.00	\$5,692,731.00	\$1,043,075.00	\$0.00	\$5,025,879.00	\$36,855,262.00
Grand Total	\$5,384,908.00	\$5,509,318.00	\$5,795,419.00	\$5,451,074.00	\$5,832,243.00	\$5,672,333.00	\$5,570,359.00	\$6,157,926.00	\$5,688,173.00	\$5,568,356.00	\$5,432,046.00	\$62,062,155.00

Check rows to filter, then drill down by: --None--

This report provides a quick look into all of the payments and deposits [Receipts and Adjustments] made in your system by month for the current calendar year.

1.7.8 Cancel Report

Cancel Report

Report Generation Status: Complete

Report Options:

Summarize information by: Sales Rep 1: Staff Name
Show: All appointments

Time Frame:
Date Field: Appointment Date
Range: Custom
From: 1/1/2016 To: 2/1/2016

Filtered By: Edit
Result not equal to Clear
AND Disregard in Statistics equals False Clear

Grouped By: Sales Rep 1: Staff Name
Sorted By: Sales Rep 1: Staff Name

	Set	Issue	Demo	Sold	Sold Price	Canceled	Canceled Amt	Cancel %	Cancel Volume %	Canceled Amount
Sales Rep 1: Staff Name: <u>Alex Carson</u> (66 records)	66	66	66	53	\$675,962.00	7	\$96,787.00	13%	70%	96,787
Sales Rep 1: Staff Name: <u>Anna Jefferson</u> (66 records)	66	33	33	33	\$465,767.00	3	\$54,443.00	9%	30%	54,443

The Cancel report focuses on the number of Sales that have been canceled in your system by Sales Rep.

1. **Set** - the number of Appointments set for this Sales Rep regardless of the Appointment's Result.
2. **Issue** - the number of Appointments that were resulted as Sold, Demoed Not Sold, Follow Up, Not

- Demoed, One Leg, No Show or Not Run that have not been disregarded in statistics.
3. **Demo** - the number of Appointments that were resulted as Sold, Demoed Not Sold or Follow Up that have not been disregarded in statistics.
 4. **Sold** - the number of Appointments that were resulted as Sold that have not been disregarded in statistics.
 5. **Sold Price** - the dollar amount of all Sales created.
 6. **Canceled** - the number of Sales canceled.
 7. **Canceled Amt** - the dollar amount of all Sales canceled.
 8. **Cancel %** - the percent of all Sales made that have been canceled for the Sales Rep during this time frame.
 9. **Canceled Volume %** - the percentage of Sales canceled for a Sales Rep as compared to all canceled Sales in this time frame.
 10. **Canceled Amount** - this duplicate field is used in the Sales Performance Dashboard, please do not delete it.

1.7.9 All Sales with Outstanding Balance

ABC HOME SERVICES Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboard

All Sales with Outstanding Balance

Report Generation Status: Complete

Report Options:

Summarize information by: Status Show All sales

Time Frame: Date Field Sold On Range Custom From To

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: [Edit](#)
Balance Due not equal to 0 [Clear](#)

Grouped By: Status
Sorted By: Status ↑

	Sold Price	Total Receipts & Adjustments	Balance Due
<input type="checkbox"/> Status: Working (2 records)	\$26,385.00	\$6,644.00	\$19,741.00
<input type="checkbox"/> Status: Net (123 records)	\$1,635,836.00	\$1,052,847.00	\$582,989.00
<input type="checkbox"/> Status: Final (7 records)	\$58,534.00	\$71,457.00	(\$12,923.00)
Grand Totals (132 records)	\$1,720,755.00	\$1,130,948.00	\$589,807.00

Check rows to filter, then drill down by: --None-- [Drill Down](#)

A comprehensive list of all Sales that have a Balance Due, summarized by their Status. This report is the perfect tool to understand all of the outstanding monies left to collect.

1.7.10 Sales by Status

ABC HOME SERVICES | Search... | 1360 Demo2 | Setup | Help & Training

Home | Prospects | Lead Sources | Appointments | Sales | Projects | Staff Calendar | Production Grid | **Reports** | Dashboards | Campaigns | Call Queue | Appointment Manager | Time Blocks Sync

Sales by Status

Report Generation Status: Note: 2,000 of 5,189 records are displayed below. Select Export Details for a complete view of your data.

Report Options:

Summarize information by: Status Show: All sales

Time Frame: Date Field: Sold On Range: Custom
 From: To:

Run Report | Hide Details | Customize | Save | Save As | Delete | Printable View | Export Details | Subscribe

Grouped By: Status
 Sorted By: Status

Correspondence Name	Sale: Sale Name	Appointment Address	Appointment City	Appointment State	Appointment Zip	Sold On	Sold Price	Sales Rep 1	Status Detail	Comments
Status: Working (41 records)							\$517,740.00			
Elvira Gundy	Basement Remodel - Gundy, Elvira	75 Public Sq #310	Cleveland	OH	44113	11/28/2016	\$7,461.00	Cece Jackson	New	-
Wilton Sentf	Windows & Doors - Sentf, Wilton	850 W 5th Ave	Columbus	OH	43212	11/28/2016	\$8,816.00	Joe Producer	New	-
Cari Baysmore	Windows & Doors - Baysmore, Cari	550 E Spring St	Columbus	OH	43215	11/28/2016	\$15,653.00	Jack Slackter	New	-
Brittney Jedik	Windows & Doors - Jedik, Brittney	101 W Prospect Ave	Cleveland	OH	44115	11/28/2016	\$11,229.00	Holly Woods	New	-
Marquita Regas	Closets - Regas, Marquita	792 Eastgale South Dr #800	Cincinnati	OH	45245	11/28/2016	\$17,240.00	Varrun Ganti	New	-
Jarod Kreutzer	Closets - Kreutzer, Jarod	401 E Court St	Cincinnati	OH	45202	11/28/2016	\$19,973.00	Quinn Turner	New	-
Pauline Hallack	Windows & Doors - Hallack, Pauline	5000 Arlington Centre Blvd	Columbus	OH	43220	11/28/2016	\$9,246.00	Joe Producer	New	-
Luke Lutman	Windows & Doors - Lutman, Luke	37 W Broad St #530	Columbus	OH	43215	11/28/2016	\$16,583.00	Jack Slackter	New	-
Kirsten Mbamalu	Windows & Doors - Mbamalu, Kirsten	338 S High St	Columbus	OH	43215	11/28/2016	\$7,694.00	John Doe	New	-
Xavier Pallerino	Basement Remodel - Pallerino, Xavier	7500 Old Oak Blvd	Cleveland	OH	44130	11/28/2016	\$7,835.00	Alex Carson	New	-
Edgar Glebocki	Windows & Doors - Glebocki, Edgar	100 E Broad St #2100	Columbus	OH	43215	11/29/2016	\$16,516.00	Joe Producer	New	-
Avis Matten	Bath Remodel - Matten, Avis	17 S High St #900	Columbus	OH	43215	11/29/2016	\$14,690.00	Anna Jefferson	New	-
Vincent Stan	Basement Remodel - Stan, Vincent	1046 Literary Rd	Cleveland	OH	44113	11/29/2016	\$15,432.00	Alex Carson	New	-
Elma Fedorek	Basement Remodel - Fedorek, Elma	113 Saint Clair Ave Ne	Cleveland	OH	44114	11/29/2016	\$20,814.00	Cece Jackson	New	-
Alyce Vallar	Windows & Doors - Vallar, Alyce	800 Superior Ave E	Cleveland	OH	44114	11/29/2016	\$8,197.00	Holly Woods	New	-

This report provides you a high-level understanding of the Status of all of the Sales in your system.

ABC HOME SERVICES Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboard

Sales by Status

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame: Date Field Range
 From To

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe

Grouped By: Status
 Sorted By: Status ↑

	Sold Price
<input type="checkbox"/> Status: Working (41 records)	\$517,740.00
<input type="checkbox"/> Status: Net (280 records)	\$3,655,854.00
<input type="checkbox"/> Status: Paid In Full (38 records)	\$497,592.00
<input type="checkbox"/> Status: Final (4,830 records)	\$64,174,268.00
Grand Totals (5,189 records)	\$68,845,454.00

Check rows to filter, then drill down by: Drill Down

Click 'Hide Details' to collapse the report and see a high-level summary of the number of Sales in each Status and the dollar amount of Sales.

1.7.11 Receipts & Adjustments MTD

ABC HOME SERVICES Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards

Receipts & Adjustments MTD

Report Generation Status: Complete

Report Options:

Summarize information by: Status Show All sales

Time Frame: Date Field Received Range This Month From 5/1/2017 To 5/31/2017

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: Edit
Status not equal to Canceled Clear

Grouped By: Status Sale: Sale Name
Sorted By: Status > Sale: Sale Name

	Amount	Sold Price	Balance Due
<input type="checkbox"/> Status: Net (7 records)	\$75,065.00	\$107,737.00	\$32,672.00
Sale: Sale Name: <u>Basement Remodel : Ducasse, Micah</u> (1 record)	\$6,326.00	\$11,501.00	\$5,175.00
Sale: Sale Name: <u>Basement Remodel : Korinta, Waylon</u> (1 record)	\$14,253.00	\$20,361.00	\$6,108.00
Sale: Sale Name: <u>Bath Remodel : Bechler, Malissa</u> (1 record)	\$10,189.00	\$16,704.00	\$6,515.00
Sale: Sale Name: <u>Blinds : Rocchio, Young</u> (1 record)	\$7,182.00	\$14,363.00	\$7,181.00
Sale: Sale Name: <u>Windows & Doors : Ardan, Erin</u> (1 record)	\$13,918.00	\$14,498.00	\$580.00
Sale: Sale Name: <u>Windows & Doors : Eriebach, Darla</u> (1 record)	\$10,395.00	\$16,242.00	\$5,847.00
Sale: Sale Name: <u>Windows & Doors : Haubold, Anthony</u> (1 record)	\$12,802.00	\$14,068.00	\$1,266.00
<input type="checkbox"/> Status: Final (399 records)	\$5,158,613.00	\$5,158,613.00	\$0.00
Sale: Sale Name: <u>Basement Remodel : Attilio, Lucretia</u> (1 record)	\$12,117.00	\$12,117.00	\$0.00

A list of all Receipts and Adjustments received month to date. This report is summarized by the Sale the Receipt and Adjustment is tied to as well as the Status of the Sale.

1.8 Projects

1.8.1 Active Projects

ABC HOME SERVICES

Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards Camp

Active Projects

Report Generation Status: Complete

Report Options:

Summarize information by: Project: Project Name Show All project activities

Time Frame: Date Field: Start Range: Custom From: To:

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: Edit
Project Status equals Active Clear

Grouped By: Project: Project Name
Sorted By: Project: Project Name +

	Sold Price	Balance Due
<input type="checkbox"/> Project: Project Name: <u>Basement Remodel : Boozer, Vincent</u> (5 records)	\$52,680.00	\$0.00
<input type="checkbox"/> Project: Project Name: <u>Basement Remodel : Borum, Abel</u> (5 records)	\$72,470.00	\$0.00
<input type="checkbox"/> Project: Project Name: <u>Basement Remodel : Briagas, Deann</u> (5 records)	\$32,975.00	\$0.00
<input type="checkbox"/> Project: Project Name: <u>Basement Remodel : Butts, Kent</u> (5 records)	\$56,470.00	\$0.00
<input type="checkbox"/> Project: Project Name: <u>Basement Remodel : Cavitt, Deana</u> (5 records)	\$74,535.00	\$0.00
<input type="checkbox"/> Project: Project Name: <u>Basement Remodel : Chatampaya, Verna</u> (5 records)	\$93,765.00	\$0.00

A comprehensive list of all Projects in your system in the 'Active' Status. Summarized by the Project Name, the Active Projects report provides you with the Sold Price and the Balance due for each Project.

1.8.2 GuildQuality Report

ABC HOME SERVICES | Search... | i360 Demo2 | Setup | Help & Training | ImproveIt 360

Home | Prospects | Lead Sources | Appointments | Sales | Projects | Staff Calendar | Production Grid | **Reports** | Dashboards | Campaigns | Call Queue | Appointment Manager | Time Blocks Sync

GuildQuality Report

Report Generation Status: Complete

Report Options:
 Summarize information by: Show: Time Frame: Date Field: Range:
 --None-- | All prospects | Paid in Full On | Last Week
 From: 5/21/2017 To: 5/27/2017

Run Report | Hide Details | Customize | Save | Save As | Delete | Printable View | Export Details | Subscribe

Filtered By: 1 OR 2 Edit
 1. Primary Email not equal to
 2. Secondary Email not equal to

Correspondence Name	Address	City	State/Province	Zip/Postal Code	Primary Email	Secondary Email	Phone 1	Phone 2	Phone 3	Sales Rep 1: Staff Name	Project Manager: Staff Name	Job Type (Formatted)	Installation Crew: Staff Name	Sold Price
Rochelle Rukavina	509 Roney Ln	Cincinnati	OH	45244	rochelle@rukavina.com	-	(513) 528-7261	-	-	Hannah Bunch	-	Closets	-	\$17,522.00
Jarrod Lenny	89 E Nationwide Blvd	Columbus	OH	43215	jarrod@lenny.com	-	(614) 221-4710	-	-	Joe Producer	-	Windows & Doors	-	\$11,957.00
Jefferson Broege	37 W Broad St #	Columbus	OH	43215	jefferson@broeega.com	-	(614) 464-5516	-	-	Anna Jefferson	-	Bath Remodel	-	\$19,178.00
Andy Canaga	1422 Euclid Ave	Cleveland	OH	44115	andy@canaga.com	-	(216) 771-8159	-	-	Cece Jackson	-	Basement Remodel	-	\$13,769.00
Alonso Cousar	1301 E 8th St	Cleveland	OH	44114	alonso@cousar.com	-	(216) 696-1863	-	-	Holly Woods	-	Windows & Doors	-	\$9,059.00
Myles Stear	401 E McMillan St	Cincinnati	OH	45206	myles@stear.com	-	(513) 751-2778	-	-	Varun Ganti	-	Blinds	-	\$13,400.00
Drew Art	1243 W 8th St	Cincinnati	OH	45203	drew@art.com	-	(513) 352-8194	-	-	Quinn Turner	-	Closets	-	\$7,758.00
Bernard Spellman	1265 Neil Ave	Columbus	OH	43201	bernard@spellman.com	-	(614) 297-4436	-	-	Joe Producer	-	Windows & Doors	-	\$11,247.00
Melody Wehrwein	50 W Broad St #1100	Columbus	OH	43215	melody@wehrwein.com	-	(614) 461-1521	-	-	Jack Slacker	-	Windows & Doors	-	\$7,872.00
Vicki Galvis	261 S Front St	Columbus	OH	43215	vicki@galvis.com	-	(614) 228-8671	-	-	John Doe	-	Windows & Doors	-	\$8,664.00
Julianne Waizer	1280 W 3rd St	Cleveland	OH	44113	julianne@waizer.com	-	(216) 696-7918	-	-	Alex Carson	-	Basement Remodel	-	\$18,588.00

The GuildQuality report provides a list of all Sales that were placed in the 'Paid in Full' status last week that can be exported and emailed to your GuildQuality rep. GuildQuality is the industry leader in customer satisfaction surveying and can help your company grow and improve the quality of your end product. Click here to learn more.

1.8.3 Installs Next Week

ABC HOME SERVICES | Search... | i360 Demo2 | Setup | Help & Training

Home | Prospects | Lead Sources | Appointments | Sales | Projects | Staff Calendar | Production Grid | **Reports** | Dashboards | Campaigns | Call Queue | Appointment Manager | Time Blocks Sync

Installs Next Week

Report Generation Status: Note: 2,000 of 2,811 records are displayed below. Select Export Details for a complete view of your data.

Report Options:
 Summarize information by: Show: Time Frame: Date Field: Range:
 Project Number | All project activities | Start | Next Week
 From: 6/4/2017 To: 6/10/2017

Run Report | Hide Details | Customize | Save | Save As | Delete | Printable View | Export Details | Subscribe

Filtered By: Edit
 Project Activity: Project Activity Name contains Install Clear

Grouped By: Project Number
 Sorted By: Project Number

Correspondence Name	Project: Project Name	Project Manager	Project Activity: Project Activity Name	Assigned To	Start	End	Comments	Project: Sold Price	Balance Due
Project Number: PRJ24099 (1 record)									
Abe Peppas	Windows & Doors - Peppas, Abe	-	Install	-	6/2/2016 9:00 AM	6/2/2016 3:00 PM	Peppas - Windows & Doors	\$5,862.00	\$0.00
Project Number: PRJ24100 (1 record)									
Serena Stent	Windows & Doors - Stent, Serena	-	Install	-	6/2/2016 9:00 AM	6/2/2016 3:00 PM	Stent - Windows & Doors	\$13,550.00	\$0.00
Project Number: PRJ24101 (1 record)									
Jackie Elles	Basement Remodel - Elles, Jackie	-	Install	-	6/2/2016 9:00 AM	6/2/2016 3:00 PM	Elles - Basement Remodel	\$9,013.00	\$0.00
Project Number: PRJ24102 (1 record)									
Cecilia Sime	Windows & Doors - Sime, Cecilia	-	Install	-	6/2/2016 9:00 AM	6/2/2016 3:00 PM	Sime - Windows & Doors	\$9,781.00	\$0.00
Project Number: PRJ24103 (1 record)									
Neville Capello	Blinds - Capello, Neville	-	Install	-	6/2/2016 9:00 AM	6/2/2016 3:00 PM	Capello - Blinds	\$17,010.00	\$0.00

A list of all Installs scheduled to start next week summarized by the Project Number. This report provides you a snapshot of the all balances remaining on Projects set to be completed next week.

1.8.4 Project Aging

ABC HOME SERVICES Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards Campaigns Call Queue Appointment Manager

Project Aging

Report Generation Status: Complete

Report Options:

Summarize information by: Sale: Correspondence Name Show: All projects

Time Frame: Date Field: Exemption Clearance Signed Range: Custom From: To:

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: Edit
Status equals Active Clear
AND Project Age (days) greater than 30 Clear

Grouped By: Sale: Correspondence Name
Sorted By: Sale: Correspondence Name ↑

	Sold Price	Sale: Total Receipts & Adjustments	Sale: Balance Due	Project Costs Total	Profit	Project Age (days)	Margin %
<input type="checkbox"/> Sale: Correspondence Name: Abel Borum (1 record)	\$14,494.00	\$14,494.00	\$0.00	\$0.00	\$14,494.00	163	0.00%
<input type="checkbox"/> Sale: Correspondence Name: Abel Capanna (1 record)	\$13,639.00	\$13,639.00	\$0.00	\$0.00	\$13,639.00	163	0.00%
<input type="checkbox"/> Sale: Correspondence Name: Adrienne Kopperman (1 record)	\$17,950.00	\$17,950.00	\$0.00	\$0.00	\$17,950.00	163	0.00%
<input type="checkbox"/> Sale: Correspondence Name: Ahmad Seegar (1 record)	\$16,424.00	\$16,424.00	\$0.00	\$0.00	\$16,424.00	163	0.00%
<input type="checkbox"/> Sale: Correspondence Name: Alba Brech (1 record)	\$15,060.00	\$15,060.00	\$0.00	\$0.00	\$15,060.00	163	0.00%
<input type="checkbox"/> Sale: Correspondence Name: Allen Julio (1 record)	\$17,341.00	\$8,150.00	\$9,191.00	\$0.00	\$17,341.00	163	0.00%

This report provides as list of all Active Projects that have been open for more than 30 days.

1. **Sold Price** - the dollar amount of all Sales created.
2. **Total Receipts & Adjustments** - the dollar amount of all Receipts and Adjustments added to the Sale.
3. **Balance Due** - the dollar amount still owed by the customer.
4. **Project Cost Total** - the sum of all Project Cost records added to the Project.
5. **Profit** - the difference between the Sold Price and sum of all Project Costs added.
6. **Project Age (days)** - the number of days the Project has been open.
7. **Margin %** - the percent profit earned on this Project.

1.8.5 Project Completion by PM Last 30 Days

ABC HOME SERVICES | Search... | 360 Demo2 | Setup | Help & Training | **improveit!**

Home | Prospects | Lead Sources | Appointments | Sales | **Projects** | Staff Calendar | Production Grid | **Reports** | Dashboards | Campaigns | Call Queue | Appointment Manager | Time Blocks Sync

Project Completion by PM Last 30 Days

Report Generation Status: Complete

Report Options:
 Summarize Information by: Project Manager | Show: All projects | Time Frame: Project Completed Date | Range: Last 30 Days | From: 5/2/2017 | To: 5/31/2017

Run Report | Hide Details | Customize | Save | Save As | Delete | Printable View | Export Details | Subscribe

Filtered By: Edit
 Project Completed Date not equal to Clear

Grouped By: Project Manager
 Sorted By: Project Manager

Correspondence Name	Sale: Sales Rep	Sale: Sold On	Sale: Sale Name	Project: Project Name	Project Completed Date	Sold On to Project Completed	Product Category	Project Costs Total	Profit
Project Manager: Alex Carson (3 records)									
Burford Starkweather	Jack Slackar	11/00/2015	Windows & Doors - Starkweather, Burford	Windows & Doors - Starkweather, Burford	12/17/2015	17	Windows & Doors	\$0.00	\$46,767.00
Maria Siniscalchi	Holly Woods	11/00/2015	Windows & Doors - Siniscalchi, Maria	Windows & Doors - Siniscalchi, Maria	12/17/2015	17	Windows & Doors	\$0.00	\$6,522.00
Hal Caswell	Jack Slackar	11/00/2015	Windows & Doors - Caswell, Hal	Windows & Doors - Caswell, Hal	12/17/2015	17	Windows & Doors	\$0.00	\$19,120.00
Project Manager: Danny Nevada (1 record)									
Dolores Gestlether	Coco Jackson	11/00/2015	Basement Remodel - Gestlether, Dolores	Basement Remodel - Gestlether, Dolores	12/17/2015	17	Basement Remodel	\$0.00	\$8,167.00
Project Manager: Francis Rean (2 records)									
Refugio Gokley	Vanun Ganli	11/00/2015	Closets - Gokley, Refugio	Closets - Gokley, Refugio	12/17/2015	17	Closets	\$0.00	\$23,847.00
Chester Crawford	Joe Producer	11/00/2015	Windows & Doors - Crawford, Chester	Windows & Doors - Crawford, Chester	12/17/2015	17	Windows & Doors	\$0.00	\$11,885.00
Project Manager: Joe Producer (3 records)									
Phyllis Renfro	Joe Producer	11/00/2015	Windows & Doors - Renfro, Phyllis	Windows & Doors - Renfro, Phyllis	12/17/2015	17	Windows & Doors	\$0.00	\$44,450.00
Santo Insera	Alex Carson	11/00/2015	Basement Remodel - Insera, Santo	Basement Remodel - Insera, Santo	12/17/2015	17	Basement Remodel	\$0.00	\$16,917.00
Randall Lach	John Doe	11/00/2015	Windows & Doors - Lach, Randall	Windows & Doors - Lach, Randall	12/17/2015	17	Windows & Doors	\$0.00	\$21,276.00
Grand Totals (9 records)								\$0.00	\$123,231.00

Check rows to filter, then drill down by: --None-- | Drill Down

Confidential Information - Do Not Distribute

This reports lists all of the projects completed in the last 30 days summarized by Project Manager. Along with basic Sale and Project information, this report also offers the number of days from the the Sold On date to the Project Completed Date.

1.8.6 Projects Completed by PM/Month YTD

ABC HOME SERVICES | Search... | Search

Home | Prospects | Lead Sources | Appointments | Sales | Projects | Staff Calendar | Production Grid | **Reports** | Dashboards | Campaigns | Call Queue | Appointment Manag

Projects Completed by PM/Month YTD

Report Generation Status: Complete

Report Options:

Summarize information by: Summarize information by: Show:

Time Frame
 Date Field: Range:
 From: To:

Run Report | Show Details | Customize | Save | Save As | Delete | Printable View | Export Details | Subscribe

Filtered By: Edit
 Project Completed Date not equal to [Clear](#)
 AND Project Manager not equal to [Clear](#)

Sum of Sold Price	Project Completed Date											Grand Total
Project Manager	January 2016	February 2016	March 2016	April 2016	May 2016	June 2016	July 2016	August 2016	September 2016	October 2016	November 2016	
<input type="checkbox"/> Alex Carson	\$25,600.00	\$35,590.00	\$25,743.00	\$35,995.00	\$29,627.00	\$28,012.00	\$42,905.00	\$30,933.00	\$29,476.00	\$62,392.00	\$23,389.00	\$369,862.00
<input type="checkbox"/> Danny Nevada	\$8,522.00	\$34,063.00	\$31,245.00	\$44,290.00	\$15,058.00	\$20,312.00	\$55,827.00	\$27,534.00	\$15,563.00	\$61,864.00	\$24,140.00	\$338,418.00
<input type="checkbox"/> Francis Bean	\$35,452.00	\$35,845.00	\$38,552.00	\$46,216.00	\$41,912.00	\$17,818.00	\$48,943.00	\$35,026.00	\$22,762.00	\$64,534.00	\$24,910.00	\$411,970.00
<input type="checkbox"/> Joe Producer	\$36,615.00	\$22,745.00	\$23,581.00	\$17,522.00	\$42,275.00	\$28,026.00	\$60,388.00	\$37,482.00	\$23,624.00	\$42,497.00	\$19,338.00	\$354,093.00
Grand Total	\$106,189.00	\$128,243.00	\$119,121.00	\$144,023.00	\$128,872.00	\$94,168.00	\$208,063.00	\$130,975.00	\$91,425.00	\$231,287.00	\$91,777.00	\$1,474,143.00

Check rows to filter, then drill down by:

This report in a 'matrix' format offers a grid of all Projects completed by month by the Project Manager assigned.

1.8.7 Projects with Project Costs

ABC HOME SERVICES Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards Campa

Projects with Project Costs

Report Generation Status: Complete

Report Options:

Summarize information by: Project: Project Name Show All projects

Time Frame: Date Field Exemption Clearance Signed Range Custom From To

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe

Grouped By: Project: Project Name Type
Sorted By: Project: Project Name > Type

	Sold Price	Profit	Amount	Project Costs Total	Margin %	% of Total Cost
<input type="checkbox"/> Project: Project Name: <u>Windows & Doors : Sliz, Karin</u> (5 records)	\$10,091.00	\$7,604.00	\$2,487.00	\$2,487.00	75.4%	
Type: Subcontractor Materials (1 record)	\$10,091.00	\$7,604.00	\$12.00	\$2,487.00		0.5%
Type: Subcontractor Labor (1 record)	\$10,091.00	\$7,604.00	\$450.00	\$2,487.00		18.1%
Type: Other Indirect (1 record)	\$10,091.00	\$7,604.00	\$275.00	\$2,487.00		11.1%
Type: Install Employee Labor (1 record)	\$10,091.00	\$7,604.00	\$500.00	\$2,487.00		20.1%
Type: Commission (1 record)	\$10,091.00	\$7,604.00	\$1,250.00	\$2,487.00		50.3%
Grand Totals (5 records)	\$10,091.00	\$7,604.00	\$2,487.00	\$2,487.00		

Check rows to filter, then drill down by: --None-- Drill Down

A comprehensive list of all Projects in your system with all associated Project Costs listed by Type.

1. **Type** - the reason the Project Cost was incurred.
2. **Sold Price** - the total dollar amount of the Sale.
3. **Profit** - formula displaying the Sold Price minus the Project Cost Total.
4. **Amount** - the dollar amount of the individual Project Cost.
5. **Project Cost Total** - the sum of all Project Costs entered.
6. **Margin %** - the % profit on the Project.
7. **% of Total Cost** - the % each Project Cost contributed to the total Project Costs entered.

1.9 Purchase Orders

1.9.1 Purchase Orders by Status

ABC HOME SERVICES Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards Cam

Purchase Orders by Status

Report Generation Status: Complete

Report Options:

Summarize information by: Status Show All purchase orders

Time Frame: Date Field Placed Range Custom From To

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe

Grouped By: Status Project: Project Name
Sorted By: Status > Project: Project Name

	Discounts	Shipping	Subtotal	Tax	Total
<input type="checkbox"/> Status: Draft (1 record)	(\$500.00)	\$500.00	\$3,745.00	\$250.00	\$3,995.00
Project: Project Name: <u>Basement Remodel : Dotter, Hipolito</u> (1 record)	(\$500.00)	\$500.00	\$3,745.00	\$250.00	\$3,995.00
<input type="checkbox"/> Status: Submitted (1 record)	(\$100.00)	\$200.00	\$750.00	\$125.00	\$975.00
Project: Project Name: <u>Bath Remodel : Hassel, Ava</u> (1 record)	(\$100.00)	\$200.00	\$750.00	\$125.00	\$975.00
<input type="checkbox"/> Status: Received (2 records)	(\$140.00)	\$270.00	\$1,330.00	\$45.00	\$1,505.00
Project: Project Name: <u>Blinds : Wee, Cecilia</u> (1 record)	(\$40.00)	\$20.00	\$75.00	\$20.00	\$75.00
Project: Project Name: <u>Windows & Doors : Sliz, Karin</u> (1 record)	(\$100.00)	\$250.00	\$1,255.00	\$25.00	\$1,430.00
Grand Totals (4 records)	(\$740.00)	\$970.00	\$5,825.00	\$420.00	\$6,475.00

Check rows to filter, then drill down by: --None-- Drill Down

This report provides a comprehensive list of all Purchase Orders created by their current 'Status' and their associated Project.

1.9.2 Purchase Orders by Vendor

ABC HOME SERVICES Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards Campaigns Call Queue Appoint

Purchase Orders by Vendor

Report Generation Status: Complete

Report Options:

Summarize information by: Vendor Show All purchase orders

Time Frame: Date Field Placed Range Custom From To

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

Grouped By: Vendor Sorted By: Vendor

Project: Correspondence Name	Project: Project Name	Purchase Order: Purchase Order ID	Status	Description	Discounts	Shipping	Subtotal	Tax	Total
Vendor: <u>Basement All Dry Supply</u> (1 record)									
Hipolito Dotter	Basement Remodel - Dotter, Hipolito	PO-000001	Draft	-	(\$500.00)	\$500.00	\$3,745.00	\$250.00	\$3,995.00
Vendor: <u>Bath Fixtures America</u> (1 record)									
Ava Hassel	Bath Remodel - Hassel, Ava	PO-000003	Submitted	-	(\$100.00)	\$200.00	\$750.00	\$125.00	\$975.00
Vendor: <u>Blind Supply USA</u> (1 record)									
Cecilia Wee	Blinds - Wee, Cecilia	PO-000002	Received	-	(\$40.00)	\$20.00	\$75.00	\$20.00	\$75.00
Vendor: <u>Window Parts Express</u> (1 record)									
Karin Sliz	Windows & Doors - Sliz, Karin	PO-000000	Received	-	(\$100.00)	\$250.00	\$1,255.00	\$25.00	\$1,430.00
Grand Totals (4 records)					(\$740.00)	\$970.00	\$5,825.00	\$420.00	\$6,475.00

Check rows to filter, then drill down by: --None-- Drill Down

This report provides a comprehensive list of all Purchase Orders created by their associated Vendor.

1.9.3 Purchase Orders not received

ABC HOME SERVICES 1360 Dem

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards Campaigns Call Queue Appointment Manag

Purchase Orders not received

Report Generation Status: Complete

Report Options:

Summarize information by: Status Show: All purchase orders

Time Frame: Date Field: Placed Range: Custom
From: To:

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: [Edit](#)
Status equals **Draft, Submitted, Canceled** [Clear](#)

Grouped By: Status
Sorted By: Status

Project: Correspondence Name	Project: Project Name	Purchase Order: Purchase Order ID	Vendor	Description	Discounts	Shipping	Subtotal	Tax	Total
Status: Draft (1 record)									
<input type="checkbox"/>	Hipolito Dotter	Basement Remodel : Dotter, Hipolito	PO-000001	Basement All Dry Supply	-\$500.00	\$500.00	\$3,745.00	\$250.00	\$3,995.00
Status: Submitted (1 record)									
<input type="checkbox"/>	Ava Hassel	Bath Remodel : Hassel, Ava	PO-000003	Bath Fixtures America	-\$100.00	\$200.00	\$750.00	\$125.00	\$975.00
Grand Totals (2 records)					(\$600.00)	\$700.00	\$4,495.00	\$375.00	\$4,970.00

Check rows to filter, then drill down by: --None-- [Drill Down](#)

This report provides a list of all Purchase Orders in the Status of 'Draft', 'Submitted' or 'Canceled'.

1.9.4 Purchase Orders Received

ABC HOME SERVICES Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards Campaigns Call Queue Appointme

Purchase Orders Received

Report Generation Status: Complete

Report Options:

Summarize information by: Status Show All purchase orders

Time Frame: Date Field Placed Range Custom From To

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: Edit Status equals Received Clear

Grouped By: Status Sorted By: Status ↑

Project: Correspondence Name	Project: Project Name	Purchase Order: Purchase Order ID	Vendor	Description	Discounts	Shipping	Subtotal	Tax	Total
Status: Received (2 records)									
Karin Sliz	Windows & Doors : Sliz, Karin	PO-000000	Window Parts Express	-	(\$100.00)	\$250.00	\$1,255.00	\$25.00	\$1,430.00
Cecilia Wee	Blinds : Wee, Cecilia	PO-000002	Blind Supply USA	-	(\$40.00)	\$20.00	\$75.00	\$20.00	\$75.00
Grand Totals (2 records)									

Check rows to filter, then drill down by: --None-- Drill Down

This report provides a list of all Purchase Orders with the 'Status' of 'Received'.

1.10 Loans

1.10.1 Loans by Status

ABC HOME SERVICES Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid

Loans by Status

Report Generation Status: Complete

Report Options:

Summarize information by: Status Show All loans

Time Frame: Date Field Approved Date Range Custom From To

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe

Grouped By: Status Sorted By: Status ↑

	Sale: Sold Price	Loan Amount	Approval Amount	Loan Opportunity
<input type="checkbox"/> Status: New (1 record)	\$15,797.00	\$7,500.00	\$0.00	\$0.00
<input type="checkbox"/> Status: Applied (1 record)	\$12,101.00	\$5,000.00	\$8,500.00	\$3,601.00
<input type="checkbox"/> Status: Approved (1 record)	\$6,162.00	\$7,500.00	\$10,500.00	(\$4,338.00)
<input type="checkbox"/> Status: Denied (1 record)	\$15,909.00	\$0.00	\$0.00	\$0.00
Grand Totals (4 records)	\$49,969.00	\$20,000.00	\$19,000.00	\$30,969.00

Check rows to filter, then drill down by: --None-- Drill Down

A comprehensive list of all Loans entered summarized by the assigned 'Status'.

1. **Sold Price** - the total dollar amount of the associated Sale.
2. **Loan Amount** - the dollar amount the client applied for.
3. **Approval Amount** - the dollar amount the client was approved for.
4. **Loan Opportunity** - the dollar amount of any unused monies derived from the difference of the Loan and Approval Amount.

1.11 Pay per Lead Reports

1.11.1 Pay per Lead - Conversions by Provider

Report Generation Status: Complete

Report Options:

Summarize information by: Show: Time Frame: Range: From: To:

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

Grouped By: Sorted By:

eLead Name	Prospect: Prospect Name	Appointment Name	Set By: Staff Name	Appointment Date	Sales Rep 1: Staff Name	Result	Appointment Count	Conversion %
Source: Home Advisor (4 records)								
2	Rodriguez, Mona	Rodriguez, Mona Basement Remodel	Admin User	6/1/2017	Alex Carson	-	1	75.00%
1	Carla, Martin	Carla, Martin Closets	Admin User	5/29/2017	Alex Carson	Follow-up	1	
3	Daniel, Jamie	Daniel, Jamie Closets	Admin User	5/25/2017	Francis Bean	Sold	1	
Jennifer Rendolph, Home Advisor Rendolph, Jennifer								
Source: Modernize (3 records)								
9	Reves, Greg	Reves, Greg Basement Remodel	Admin User	5/17/2017	Danny Nevada	Sold	1	33.33%
8	Roger, Pratt					-	-	
7	Robinson, Carmen					-	-	
Source: Quinstreet (3 records)								
5	Byrd, Fred	Byrd, Fred Basement Remodel	Admin User	5/30/2017	Alex Carson	Demoed, Not Sold	1	66.67%
4	Bowen, Barbara	Bowen, Barbara Bath Remodel	Admin User	5/10/2017	Francis Bean	Follow-up	1	
6	Sharp, Saul					-	-	
Grand Totals (10 records)							6	60.00%

Check rows to filter, then drill down by: Drill Down

This report lists all of the eLeads received from Lead Providers and your website in the last 60 days.

1. **Appointment Count** - the number of Appointments set for this Source in the given time frame.
2. **Conversion %** - the percentage of eLeads received that sat for an Appointment.

1.11.2 Pay per Lead - Lead Credit Report

The screenshot shows the 'Pay per Lead - Lead Credit Report' interface for ABC HOME SERVICES. The report is complete and shows data for the time frame from 5/1/2017 to 6/30/2017. The data is grouped by source and sorted by source. The table below summarizes the data:

	Prospect: Not Qualified	Prospect: Wrong Number	Disqualified (%)	Wrong Number (%)
Source: Home Advisor (3 records)	1	1	33.3%	33.3%
Source: Modernize (3 records)	1	0	33.3%	0.0%
Source: Quinstreet (3 records)	0	1	0.0%	33.3%
Grand Totals (9 records)	2	2	22.2%	22.2%

This report lists all of the eLeads received from Lead Providers and your website in the last 60 days with an emphasis on Prospects who have been disqualified.

1. **Not Qualified** - the number of Prospects marked as 'Not Qualified'.
2. **Wrong Number** - the number of Prospects flagged as having an incorrect number.
3. **Disqualified (%)** - the percent of eLeads that turned into disqualified Prospects.
4. **Wrong Number (%)** - the percent of eLeads that turned into Prospects marked with an incorrect number..

This report is a powerful tool to use to monitor the quality of leads you are purchasing from Lead Providers. If you purchased leads from a Lead Provider that turned out to be not qualified to purchase from you, this report will be useful in finding those Prospects.

1.12 eLeads

1.12.1 eLeads Created MTD

ABC HOME SERVICES Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards Campaigns

eLeads Created MTD

Report Generation Status: Complete

Report Options:

Summarize information by: --None-- Show All eleads

Time Frame
 Date Field: eLead: Created Date Range: This Month
 From: 6/1/2017 To: 6/30/2017

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

eLead	eLead Name	First Name	Last Name	Email	Phone 1	Phone 2	Phone 3	Conversion Issue	Prospect	Vendor	Source	Source Type
9	Greg Reyes	Greg	Reyes	-	(866) 426-5554	-	-	<input type="checkbox"/>	Reyes, Greg	eLead	Modernize	Lead Provider
8	Roger Pratt	Roger	Pratt	-	(866) 789-5412	-	-	<input type="checkbox"/>	Roger, Pratt	eLead	Modernize	Lead Provider
7	Carmen Robinson	Carmen	Robinson	-	(866) 411-1111	-	-	<input type="checkbox"/>	Robinson, Carmen	eLead	Modernize	Lead Provider
6	Saull Sharp	Saull	Sharp	-	(866) 487-5554	-	-	<input type="checkbox"/>	Sharp, Saull	eLead	Quinstreet	Lead Provider
5	Fred Byrd	Fred	Byrd	-	(866) 413-1355	-	-	<input type="checkbox"/>	Byrd, Fred	eLead	Quinstreet	Lead Provider
4	Barbara Bowen	Barbara	Bowen	-	(866) 429-8888	-	-	<input type="checkbox"/>	Bowen, Barbara	eLead	Quinstreet	Lead Provider
3	Jamie Daniel	Jamie	Daniel	-	(866) 424-5878	-	-	<input type="checkbox"/>	Daniel, Jamie	eLead	Home Advisor	Lead Provider
2	Mona Rodriguez	Mona	Rodriguez	-	(866) 425-7878	-	-	<input type="checkbox"/>	Rodriguez, Mona	eLead	Home Advisor	Lead Provider
1	Martin Carla	Martin	Carla	-	(866) 425-8788	-	-	<input type="checkbox"/>	Carla, Martin	eLead	Home Advisor	Lead Provider
Grand Totals (9 records)												

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A list of all eLeads created month to date.

1.12.2 eLeads created Today

ABC HOME SERVICES

Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards Campaigns

eLeads created Today

Report Generation Status: Complete

Report Options:

Summarize information by: --None-- Show: All eleads

Time Frame: Date Field: eLead: Created Date Range: Today From: 6/1/2017 To: 6/1/2017


Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

eLead	eLead Name	First Name	Last Name	Email	Phone 1	Phone 2	Phone 3	Conversion Issue	Prospect	Vendor	Source	Source Type
9	Greg Reyes	Greg	Reyes	-	(866) 426-5554	-	-	<input type="checkbox"/>	Reyes, Greg	eLead	Modernize	Lead Provider
8	Roger Pratt	Roger	Pratt	-	(866) 789-5412	-	-	<input type="checkbox"/>	Roger, Pratt	eLead	Modernize	Lead Provider
7	Carmen Robinson	Carmen	Robinson	-	(866) 411-1111	-	-	<input type="checkbox"/>	Robinson, Carmen	eLead	Modernize	Lead Provider
6	Saull Sharp	Saull	Sharp	-	(866) 487-5554	-	-	<input type="checkbox"/>	Sharp, Saull	eLead	Quinstreet	Lead Provider
5	Fred Byrd	Fred	Byrd	-	(866) 413-1355	-	-	<input type="checkbox"/>	Byrd, Fred	eLead	Quinstreet	Lead Provider
4	Barbara Bowen	Barbara	Bowen	-	(866) 429-8888	-	-	<input type="checkbox"/>	Bowen, Barbara	eLead	Quinstreet	Lead Provider
3	Jamie Daniel	Jamie	Daniel	-	(866) 424-5878	-	-	<input type="checkbox"/>	Daniel, Jamie	eLead	Home Advisor	Lead Provider
2	Mona Rodriguez	Mona	Rodriguez	-	(866) 425-7878	-	-	<input type="checkbox"/>	Rodriguez, Mona	eLead	Home Advisor	Lead Provider
1	Martin Carla	Martin	Carla	-	(866) 425-8788	-	-	<input type="checkbox"/>	Carla, Martin	eLead	Home Advisor	Lead Provider
Grand Totals (9 records)												

Confidential Information - Do Not Distribute

A list of all eLeads created today.

1.12.3 eLeads this week by Source



ABC HOME SERVICES

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid Reports Dashboards Campaigns

eLeads this week by Source

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame

Date Field: Range:

From: To:

Grouped By: Sorted By:

eLead:	eLead Name	First Name	Last Name	Email	Phone 1	Phone 2	Phone 3	Conversion	Issue	Prospect	Vendor	Source Type
Source: Home Advisor (3 records)												
3	Jamie	Daniel	-	(866) 424-5878	-	-	-	<input type="checkbox"/>		Daniel, Jamie	eLead	Lead Provider
2	Mona	Rodriguez	-	(866) 425-7878	-	-	-	<input type="checkbox"/>		Rodriguez, Mona	eLead	Lead Provider
1	Martin	Carla	-	(866) 425-8788	-	-	-	<input type="checkbox"/>		Carla, Martin	eLead	Lead Provider
Source: Modernize (3 records)												
9	Greg	Reyes	-	(866) 426-5554	-	-	-	<input type="checkbox"/>		Reyes, Greg	eLead	Lead Provider
8	Pratt	Roger	-	(866) 789-5412	-	-	-	<input type="checkbox"/>		Roger, Pratt	eLead	Lead Provider
7	Carmen	Robinson	-	(866) 411-1111	-	-	-	<input type="checkbox"/>		Robinson, Carmen	eLead	Lead Provider
Source: Quinstreet (3 records)												
6	Saull	Sharp	-	(866) 487-5554	-	-	-	<input type="checkbox"/>		Sharp, Saull	eLead	Lead Provider
5	Fred	Byrd	-	(866) 413-1355	-	-	-	<input type="checkbox"/>		Byrd, Fred	eLead	Lead Provider
4	Barbara	Bowen	-	(866) 429-8888	-	-	-	<input type="checkbox"/>		Bowen, Barbara	eLead	Lead Provider
Grand Totals (9 records)												

Check rows to filter, then drill down by:

Confidential Information - Do Not Distribute

A list of all eLeads created this week summarized by the Source that inserted the eLead.

1.12.4 eLeads not converted

ABC HOME SERVICES Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards Car

eLeads not converted

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame
 Date Field: Range:
 From: To:

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: [Edit](#)
 Conversion Issue equals True [Clear](#)

eLead: eLead Name	First Name	Last Name	Email	Phone 1	Phone 2	Phone 3	Conversion Issue	Prospect	Vendor	Source	Source Type
null Lahey: Website	-	Lahey	-	(877) 423-5584	-	-	<input checked="" type="checkbox"/>		eLead	Website	Manufacturer
null Randy: WebSite	-	Randy	-	-	-	-	<input checked="" type="checkbox"/>		eLead	WebSite	Manufacturer
Grand Totals (2 records)											

Confidential Information - Do Not Dis

A list of all eLeads that have not been converted into Prospects. This is usually due a lack of necessity data such as a name or address.

1.13 Call Center

1.13.1 Campaign Results by Campaign

ABC HOME SERVICES Search... Search 1360 Demos

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards Campaigns Call Queue Appointment Manager Time Blocks S

Campaign Results by Campaign

Report Generation Status: Complete

Report Options:

Summarize information by: Summarize information by: Show

Time Frame
 Date Field: Range:
 From: To:

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe

Campaign: Campaign Name		Record Count	Busy Signal	Left Message	No Answer	Not Qualified	TCPA	Wrong Number	New Appointment	Released	Return Call Later	New Marketing Opportunity	Grand Total
<input type="checkbox"/>	Existing Database <1 Year	Record Count	1	1	1	1	1	1	1	0	1	1	9
<input type="checkbox"/>	Existing Database 1+ Years	Record Count	1	2	2	1	3	2	1	0	1	1	14
<input type="checkbox"/>	Fresh 1-15 Days	Record Count	0	0	0	1	0	0	0	0	0	0	1
<input type="checkbox"/>	Fresh 31-90 Days	Record Count	1	0	1	0	0	0	0	1	1	0	4
<input type="checkbox"/>	Previous Customers <1 Year	Record Count	1	1	1	1	1	1	1	0	1	1	9
<input type="checkbox"/>	Previous Customers 1+ Years	Record Count	1	1	1	1	1	1	1	0	1	1	9
Grand Total		Record Count	5	5	6	5	6	5	4	1	5	4	46

Check rows to filter, then drill down by: [Drill Down](#)

A 'matrix' report displaying all of the actions taken in your call Campaigns during the current calendar

year by Campaign. At a glance you can see which Campaigns are setting the most Appointments or resulting in the most disqualified Prospects.

1.13.2 Campaign Results by Rep

ABC HOME SERVICES | Search... | 1360 Demo2 | Setup

Home | Prospects | Lead Sources | Appointments | Sales | Projects | Staff Calendar | Production Grid | **Reports** | Dashboards | Campaigns | Call Queue | Appointment Manager | Time Blocks Sync

Campaign Results by Rep

Report Generation Status: Complete

Report Options:

Summarize information by: Actioned By: Staff Name | Summarize information by: Action Reason | Show: All prospects

Time Frame: Date Field: Actioned At | Range: Current CY | From: 1/1/2017 | To: 12/31/2017

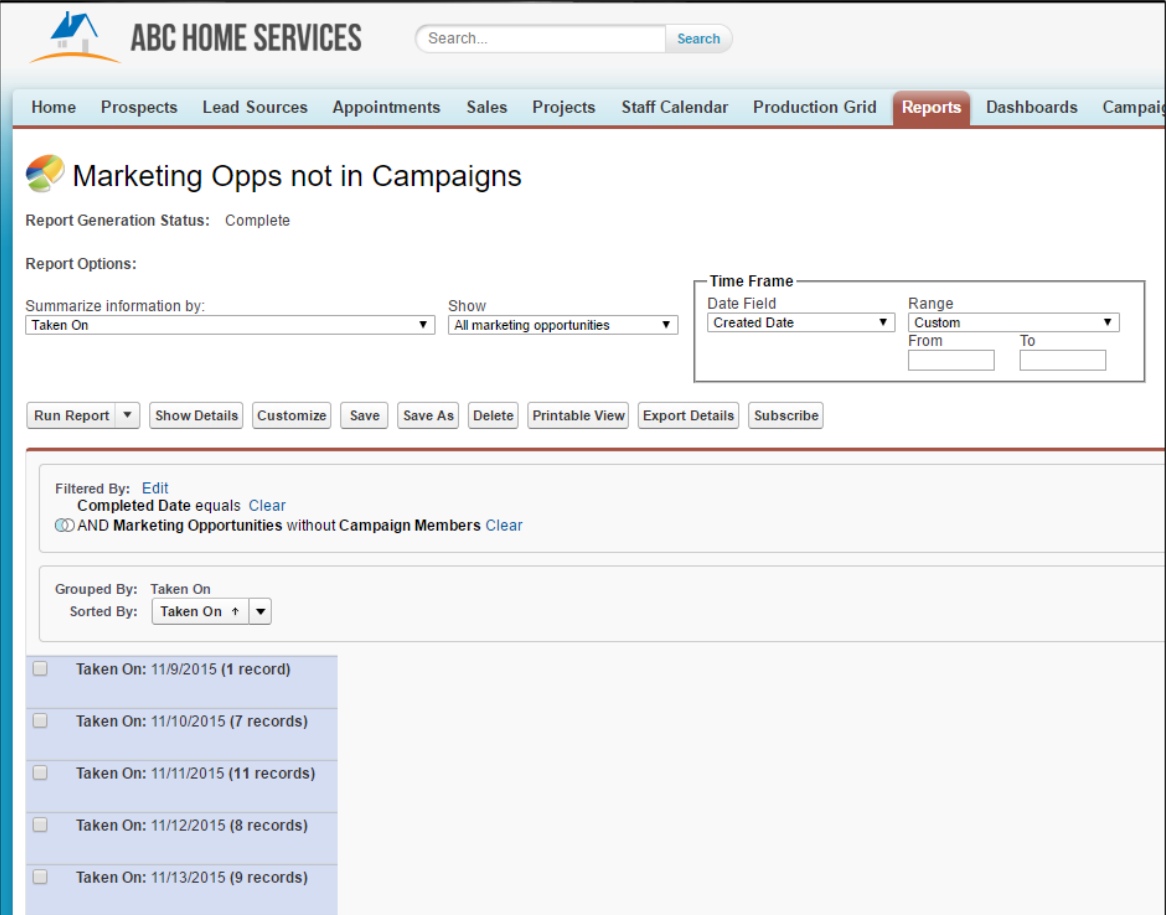
Run Report | Show Details | Customize | Save | Save As | Delete | Printable View | Export Details | Subscribe

Actioned By: Staff Name	Campaign: Campaign Name	Record Count	Action Reason										Grand Total		
			Busy Signal	Left Message	No Answer	Not Qualified	TCPA	Wrong Number	New Appointment	Return Call Later	Released	New Marketing Opportunity			
Admin User	Existing Database	Record Count	1	0	0	1	1	0	1	0	1	0	0	1	5
	Gold Mine	Record Count	1	1	4	0	0	1	2	1	4	10	24		
	Great Campaign	Record Count	1	0	0	1	1	0	1	1	0	0	5		
	Internet Leads	Record Count	0	0	1	0	0	0	0	0	0	2	3		
	Rehash	Record Count	0	2	0	0	2	1	0	1	2	0	8		
	Today's leads	Record Count	1	1	23	1	0	0	1	0	3	1	31		
	Subtotal	Record Count	4	4	28	3	4	2	5	3	9	14	76		
Chris Rice	Gold Mine	Record Count	1	0	4	0	1	1	1	0	1	3	12		
	Internet Leads	Record Count	1	0	0	0	0	1	0	0	0	2			
	Rehash	Record Count	0	1	0	0	0	0	0	0	0	1			
	Today's leads	Record Count	1	0	1	0	0	0	0	0	1	3			
	Subtotal	Record Count	3	1	5	0	1	2	1	0	2	3	18		
Dustin Kirby	Existing Database	Record Count	0	0	2	0	0	0	6	0	0	0	8		
	Gold Mine	Record Count	0	1	24	1	0	0	29	2	3	0	60		
	Today's leads	Record Count	0	0	12	0	0	0	5	0	2	1	20		
	Subtotal	Record Count	0	1	38	1	0	0	40	2	5	1	88		
Grand Total	Record Count	7	6	71	4	5	4	46	5	16	18	182			

Check rows to filter, then drill down by: --None-- | Drill Down

A 'matrix' report displaying all of the actions taken in your call Campaigns during the current calendar year by Telemarketer and Campaign. At a glance you can see which Telemarketers are setting the most Appointments.

1.13.3 Marketing Opps not in Campaigns



ABC HOME SERVICES Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards Campaigns

Marketing Opps not in Campaigns

Report Generation Status: Complete

Report Options:

Summarize information by: Taken On Show All marketing opportunities

Time Frame: Date Field Created Date Range Custom From To

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: Edit
Completed Date equals Clear
AND Marketing Opportunities without Campaign Members Clear

Grouped By: Taken On
Sorted By: Taken On ↑

<input type="checkbox"/>	Taken On: 11/9/2015 (1 record)
<input type="checkbox"/>	Taken On: 11/10/2015 (7 records)
<input type="checkbox"/>	Taken On: 11/11/2015 (11 records)
<input type="checkbox"/>	Taken On: 11/12/2015 (8 records)
<input type="checkbox"/>	Taken On: 11/13/2015 (9 records)

A list of all Marketing Opportunities that do not have not yet been called in a Campaign. This report is summarized by the Marketing Opps associated Lead Source 'Taken On' date to give you a quick view into where your Marketing Opps live in your system from a data perspective. This report is a great tool when building your Campaigns so you can target specific dates.

1.13.4 Re-Calls by Campaign

The screenshot displays the 'Re-Calls by Campaign' report interface. At the top, there is a navigation bar with 'Reports' highlighted. Below the navigation bar, the report title 'Re-Calls by Campaign' is shown along with its generation status 'Complete'. The 'Report Options' section includes a 'Summarize information by' dropdown set to 'Campaign: Campaign Name' and a 'Show' dropdown set to 'All campaign members'. A 'Time Frame' section allows for selecting a 'Date Field' (Created Date) and a 'Range' (Custom), with 'From' and 'To' input fields. Action buttons include 'Run Report', 'Show Details', 'Customize', 'Save', 'Save As', 'Delete', 'Printable View', 'Export Details', and 'Subscribe'. The report content is filtered by 'Completed On equals' and 'AND Call Queue Status equals Awaiting Re-Call'. It is grouped by 'Campaign: Campaign Name' and sorted by 'Campaign: Campaign Name'. The data is presented in a table with three rows: 'Existing Database <1 Year (1 record)', 'Existing Database 1+ Years (1 record)', and 'Fresh 31-90 Days (1 record)'. A 'Grand Totals (3 records)' row is highlighted. At the bottom, there is a 'Check rows to filter, then drill down by:' dropdown set to '--None--' and a 'Drill Down' button.

A list of all incomplete Re-Calls by Campaign. This report is a great tool to monitor the number of Re-Calls in each of your Campaigns to ensure that your Telemarketers have a manageable amount of Re-Calls to work through.

1.14 Commissions

1.14.1 Commissions by Staff

ABC HOME SERVICES

Search...

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards Campaign

Commissions by Staff

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame: Date Field Range
From To

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: [Edit](#)
Amount not equal to 0 [Clear](#)

Grouped By:
Sorted By:

	Amount	Ready To Pay	Amount Paid To Staff	Commission not paid
<input type="checkbox"/> Staff Member: Alex Carson (3 records)	\$4,118.70	\$2,325.50	\$1,793.20	\$2,325.50
<input type="checkbox"/> Staff Member: Holly Woods (1 record)	\$1,050.00	\$1,575.00	\$0.00	\$1,050.00
Grand Totals (4 records)	\$5,168.70	\$3,900.50	\$1,793.20	\$3,375.50

Check rows to filter, then drill down by: [Drill Down](#)

A list of all Commission records created summarized by Staff Member.

1. **Amount** - the total Commission dollar amount earned.
2. **Ready To Pay** - the total dollar amount ready to be paid out.
3. **Amount Paid To Staff** - the total dollars paid out to the Staff member.
4. **Commission not paid** - all commissions not yet paid out.

1.14.2 Commissions Due by Staff

ABC HOME SERVICES Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards Campaign

Commissions Due by Staff

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame
 Date Field: Range:
 From: To:

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: [Edit](#)
 Ready To Pay greater than 0 [Clear](#)

Grouped By:
 Sorted By:

	Amount	Ready To Pay	Amount Paid To Staff
<input type="checkbox"/> Staff Member: Alex Carson (2 records)	\$2,325.50	\$2,325.50	\$0.00
<input type="checkbox"/> Staff Member: Holly Woods (1 record)	\$1,050.00	\$1,575.00	\$0.00
Grand Totals (3 records)	\$3,375.50	\$3,900.50	\$0.00

Check rows to filter, then drill down by: [Drill Down](#)

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A summary of all Commissions that have a 'Ready to Pay' balance by Staff Member.

1.14.3 Commissions from Canceled Sales

ABC HOME SERVICES Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards Campaigns

Commissions from Canceled Sales

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame: Date Field Range
 From To

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: [Edit](#)
 Sale: Status equals Canceled [Clear](#)

Grouped By: Sale: Sales Rep 1
 Sorted By:

	Sale: Canceled Amt	Amount	Ready To Pay
<input type="checkbox"/> Sale: Sales Rep 1: Alex Carson (7 records)	\$96,787.00	\$0.00	\$0.00
<input type="checkbox"/> Sale: Sales Rep 1: Anna Jefferson (3 records)	\$54,443.00	\$0.00	\$0.00
Grand Totals (10 records)	\$151,230.00	\$0.00	\$0.00

Check rows to filter, then drill down by: [Drill Down](#)

A list of all Commission records associated with Canceled Sales.

1.15 Hours and Wages

1.15.1 Payout Summary - Current Pay Period

ABC HOME SERVICES Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports**

Payout Summary - Current Pay Period

Report Generation Status: Complete

Report Options:

Summarize information by: Staff: Staff Name Show All hours and wages

Time Frame: Date Field Created Date Range Custom From To

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: Edit
 Pay Period Start less than TODAY Clear
 AND Pay Period End greater than TODAY Clear

Grouped By: Staff: Staff Name
 Sorted By: Staff: Staff Name ↑

	Total Wages	Total Bonus	Commission Payout	Amount Payable
<input type="checkbox"/> Staff: Staff Name: Alexander Ellison (1 record)	\$600.00	\$50.00	\$0.00	\$650.00
<input type="checkbox"/> Staff: Staff Name: Bea Malone (1 record)	\$500.00	\$75.00	\$0.00	\$575.00
<input type="checkbox"/> Staff: Staff Name: Carolyn Welch (1 record)	\$560.00	\$0.00	\$0.00	\$560.00
Grand Totals (3 records)	\$1,660.00	\$125.00	\$0.00	\$1,785.00

Check rows to filter, then drill down by: --None-- Drill Down

A summary of all wages earned by Staff for the current pay period. This report is driven by all 'Hours and Wages' records created in the current pay period.

1. **Total Wages** - the sum of all wages earned during the current pay period.
2. **Total Bonus** - the sum of all bonus pay earned during the current pay period.
3. **Commission Payout** - the dollar amount of earned Commission to be paid out during this pay period. This value is manually entered on the Hours and Wages record.
4. **Amount Payable** - the total dollar amount payable to the Staff Member including all wages, bonuses and Commission payouts.

1.15.2 This Week's Payments to Staff

ABC HOME SERVICES Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards Campaigns Call Queue Appoin

This Week's Payments to Staff

Report Generation Status: Complete

Report Options:

Summarize information by: Staff: Staff Name Show All staff

Time Frame: Date Field Staff Account Transaction: Created Date Range This Week From 5/28/2017 To 6/3/2017

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: Edit
Type Details equals Payment to Staff Clear

Grouped By: Staff: Staff Name
Sorted By: Staff: Staff Name ↑

Staff Account Transaction: Staff Account Transaction Number	Type	Type Details	Memo	Amount	Staff Account Transaction: Created By	Staff Account Transaction: Created Date
<input type="checkbox"/> Staff: Staff Name: <u>Alexander Ellison</u> (2 records)						
AT-0002	Debit	Payment to Staff	-	\$1,250.00	i360 Demo2	6/1/2017
AT-0003	Debit	Payment to Staff	-	\$200.00	i360 Demo2	6/1/2017
<input type="checkbox"/> Staff: Staff Name: <u>Bea Malone</u> (3 records)						
AT-0004	Debit	Payment to Staff	-	\$750.00	i360 Demo2	6/1/2017
AT-0005	Debit	Payment to Staff	-	\$350.00	i360 Demo2	6/1/2017
AT-0006	Debit	Payment to Staff	-	\$300.00	i360 Demo2	6/1/2017
<input type="checkbox"/> Staff: Staff Name: <u>Carolyn Welch</u> (2 records)						
AT-0007	Debit	Payment to Staff	-	\$150.00	i360 Demo2	6/1/2017
AT-0008	Debit	Payment to Staff	-	\$200.00	i360 Demo2	6/1/2017
Grand Totals (7 records)						

Check rows to filter, then drill down by: --None-- Drill Down

A summary of all Staff Account Transactions created this week with the Type of 'Payment to Staff'. This report displays all payments made to your Staff using their Staff Account.

1.15.3 Wage Payout Detail - Current Pay Period

ABC HOME SERVICES Search... Search

Home Prospects Lead Sources Appointments Sales Projects Staff Calendar Production Grid **Reports** Dashboards

Wage Payout Detail - Current Pay Period

Report Generation Status: Complete

Report Options:

Summarize information by: Staff: Staff Name Summarize information by: Type Show: All hours and wages

Time Frame: Date Field: Created Date Range: Custom From: To:

Run Report Show Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: Edit
 Pay Period Start less than TODAY Clear
 AND Pay Period End greater than TODAY Clear

	Sum of Amount	Type	Hours		Bonus			Grand Total
Staff: Staff Name	Source Name	Category	Regular	Subtotal	Taker	Setter	Subtotal	
<input type="checkbox"/> <u>Alexander Ellison</u>	-	Sum of Amount	\$600.00	\$600.00	\$0.00	\$0.00	\$0.00	\$600.00
	Website	Sum of Amount	\$0.00	\$0.00	\$0.00	\$50.00	\$50.00	\$50.00
	Subtotal	Sum of Amount	\$600.00	\$600.00	\$0.00	\$50.00	\$50.00	\$650.00
<input type="checkbox"/> <u>Bea Malone</u>	-	Sum of Amount	\$500.00	\$500.00	\$0.00	\$0.00	\$0.00	\$500.00
	Lowe's	Sum of Amount	\$0.00	\$0.00	\$75.00	\$0.00	\$75.00	\$75.00
	Subtotal	Sum of Amount	\$500.00	\$500.00	\$75.00	\$0.00	\$75.00	\$575.00
<input type="checkbox"/> <u>Carolyn Welch</u>	-	Sum of Amount	\$560.00	\$560.00	\$0.00	\$0.00	\$0.00	\$560.00
	Subtotal	Sum of Amount	\$560.00	\$560.00	\$0.00	\$0.00	\$0.00	\$560.00
	Grand Total	Sum of Amount	\$1,660.00	\$1,660.00	\$75.00	\$50.00	\$125.00	\$1,785.00

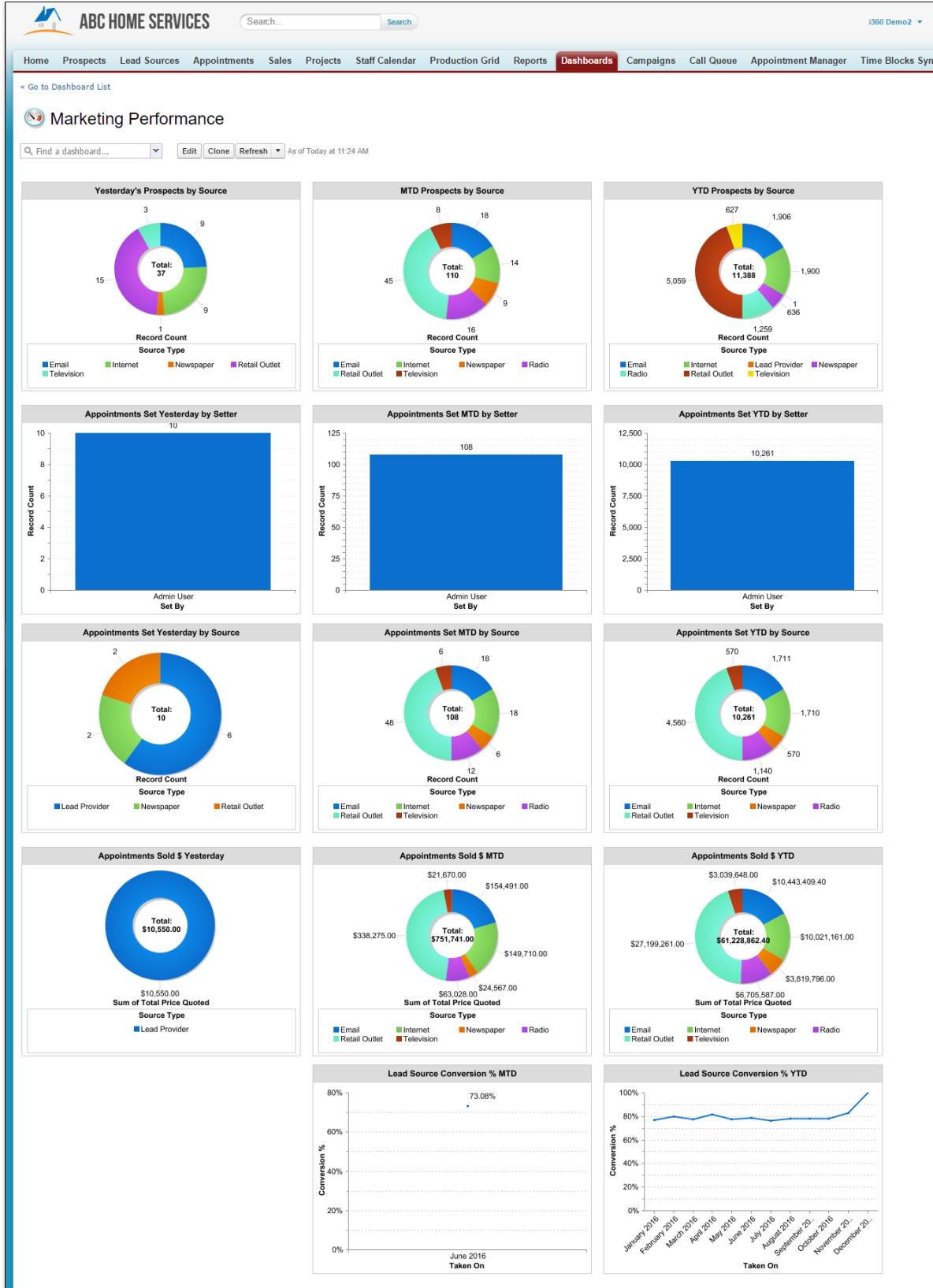
Check rows to filter, then drill down by: --None-- Drill Down

A 'matrix' report displaying a break down of all wages and bonus pay earned by Staff in the current pay period, including any Taker bonuses associated with Sources.

1.16 Dashboards

Dashboards are graphical representations of reports that make it easy to view large amounts of data on one screen. The following Dashboards are provided out-of-the-box with improveit 360.

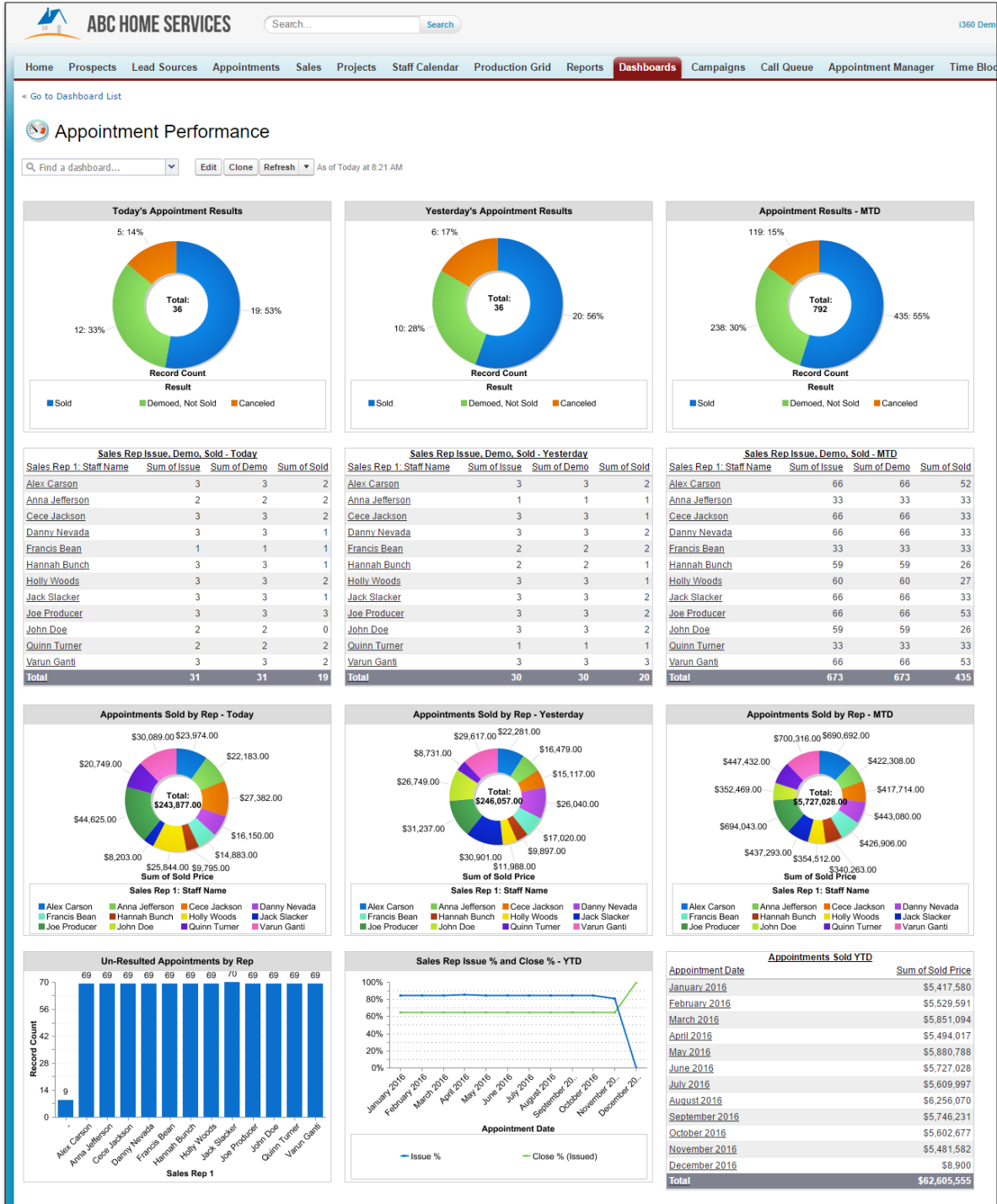
1.16.1 Marketing Performance



The Marketing Performance Dashboard provides a holistic snapshot of your Company's marketing efforts as it pertains to new Prospects enters, new Appointments set and Appointments Sold. Let's break down each graph in the Dashboard:

1. **Yesterday's Prospects by Source** - all Prospects entered yesterday by marketing Source.
2. **MTD Prospect by Source** - all Prospects entered month to date by marketing Source.
3. **YTD Prospects by Source** - all Prospects entered year to date by marketing Source.
4. **Appointments Set Yesterday by Setter** - all Appointments set yesterday by the Staff who made the set.
5. **Appointments Set MTD by Setter** - all Appointments set month to date by the Staff who made the set.
6. **Appointments Set YTD by Setter** - all Appointments set year to date by the Staff who made the set.
7. **Appointments Set Yesterday by Source** - all Appointments set yesterday by marketing Source.
8. **Appointments Set MTD by Source** - all Appointments set month to date by marketing Source.
9. **Appointments Set YTD by Source** - all Appointments set year to date by marketing Source.
10. **Appointments Sold \$ Yesterday** - all Appointments resulted as Sold that ran yesterday.
11. **Appointments Sold \$ MTD** - all Appointments resulted as Sold that ran this month.
12. **Appointments Sold \$ YTD** - all Appointments resulted as Sold that ran this year.
13. **Lead Source Conversion % MTD** - the percentage of Lead Sources that converted to Appointments this month.
14. **Lead Source Conversion % YTD** - the percentage of Lead Sources that converted to Appointments this year.

1.16.2 Appointment Performance

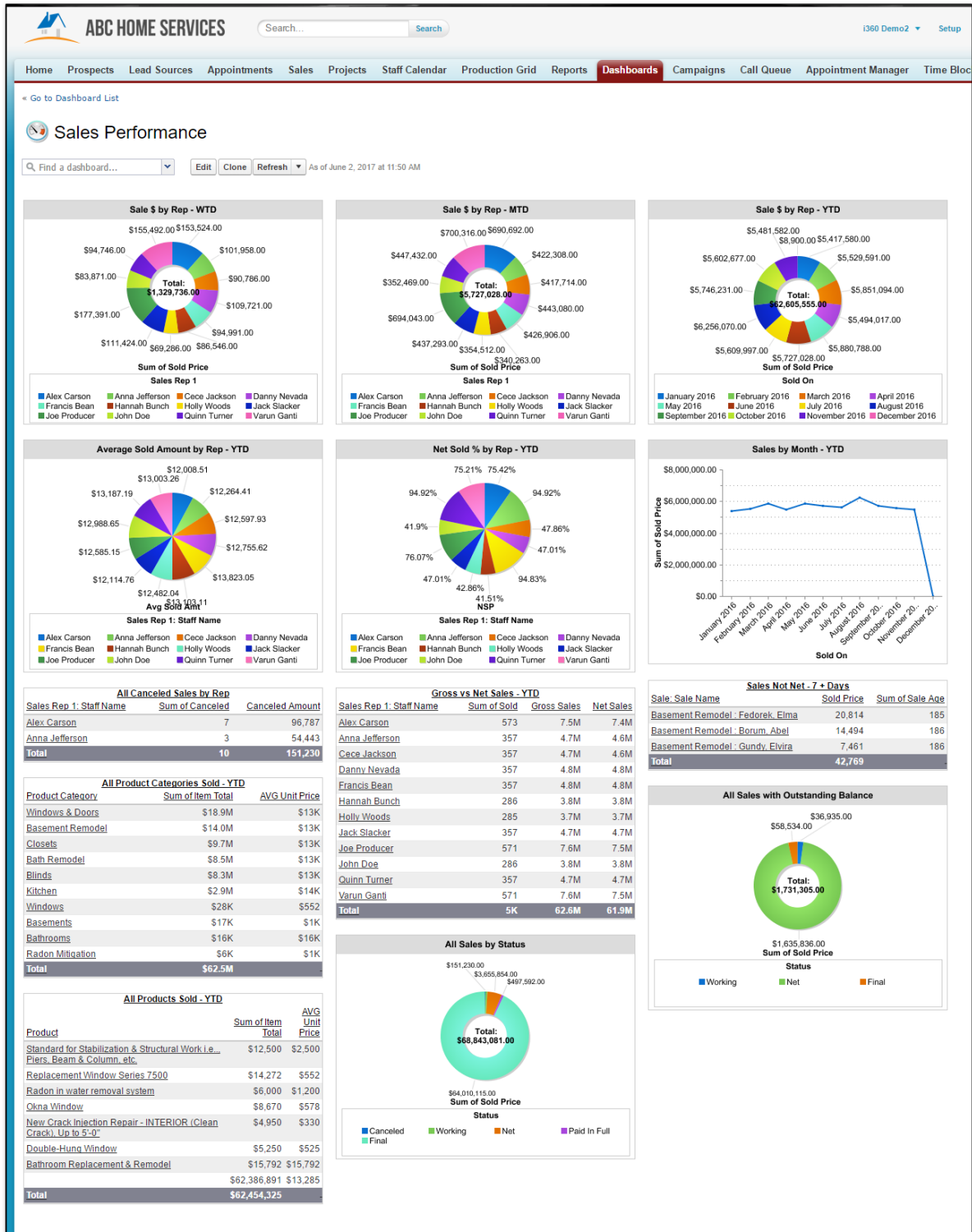


The Appointment Performance Dashboard provides a visual representation of your Company's Appointment performance. Let's break down each graph in the Dashboard:

1. **Today's Appointment Results** - all Appointments ran today and their results.
2. **Yesterday's Appointment Results** - all Appointments run yesterday and their results.

3. **Appointment Results - MTD** - all Appointments run this month and their results.
4. **Sales Rep Issue, Demo, Sold - Today** - a list of all Sales Reps and the count of how many Appointments they were issued, demoed and sold today.
5. **Sales Rep Issue, Demo, Sold - Yesterday** - a list of all Sales Reps and the count of how many Appointments they were issued, demoed and sold yesterday.
6. **Sales Rep Issue, Demo, Sold - MTD** - a list of all Sales Reps and the count of how many Appointments they were issued, demoed and sold this month.
7. **Appointments Sold by Rep - Today** - all Appointments Sold today by Sales Rep with the sum of each Sold Price.
8. **Appointments Sold by Rep - Yesterday** - all Appointments Sold yesterday by Sales Rep with the sum of each Sold Price.
9. **Appointments Sold by Rep - MTD** - all Appointments Sold month to date by Sales Rep with the sum of each Sold Price.
10. **Un-Resulted Appointments by Rep** - a count of all Appointments run today or prior without a result by Sales Rep.
11. **Sales Rep Issue % and Close % - YTD** - a line graph of your Company's overall Issue % and Close % this year by month.
12. **Appointments Sold YTD** - a list of all Appointments sold this year by month with a sum of total dollar amount sold.

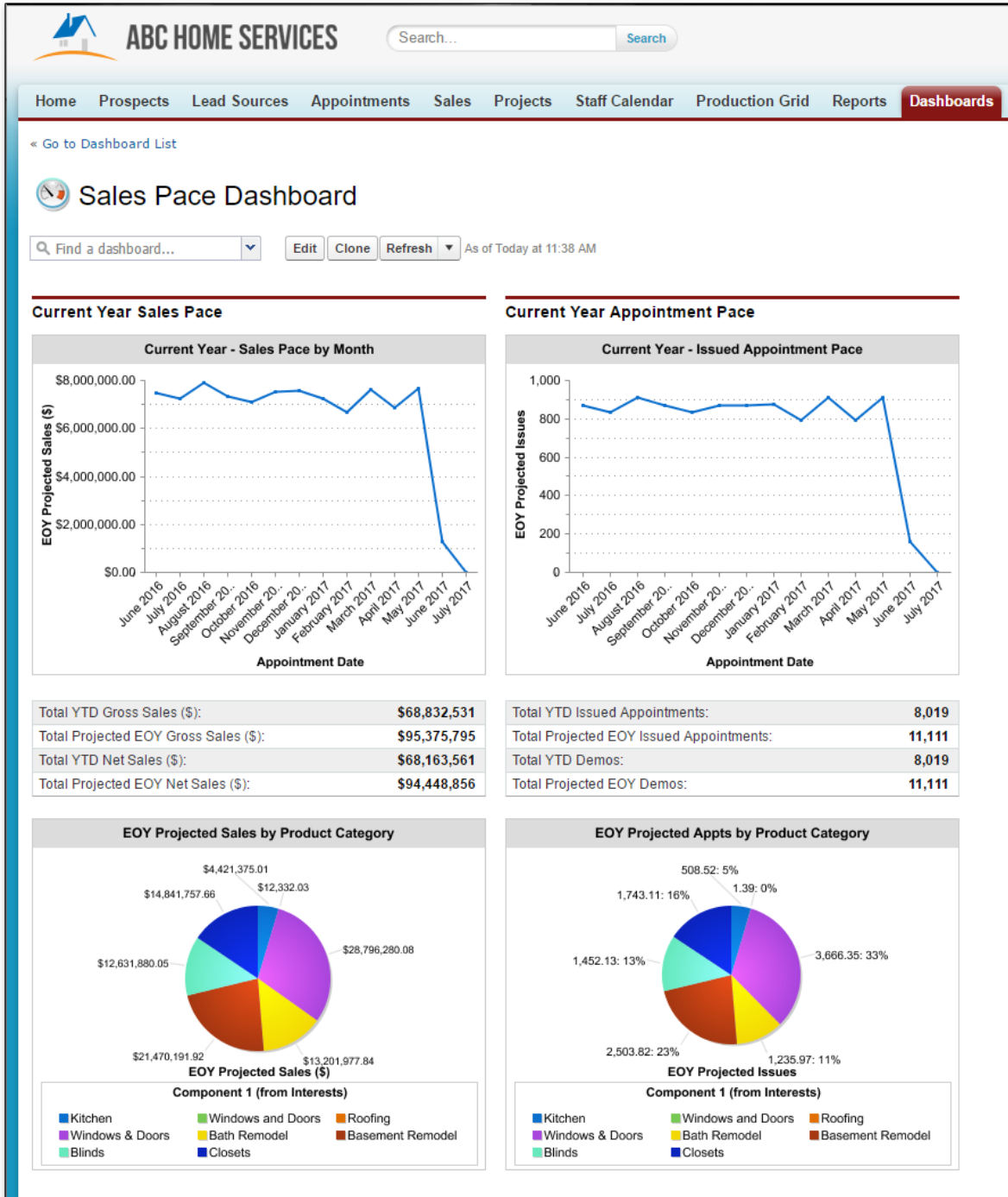
1.16.3 Sales Performance



The Sales Performance dashboard provides a deep dive into your Company's Sales KPIs. Let's break down each graph in the Dashboard:

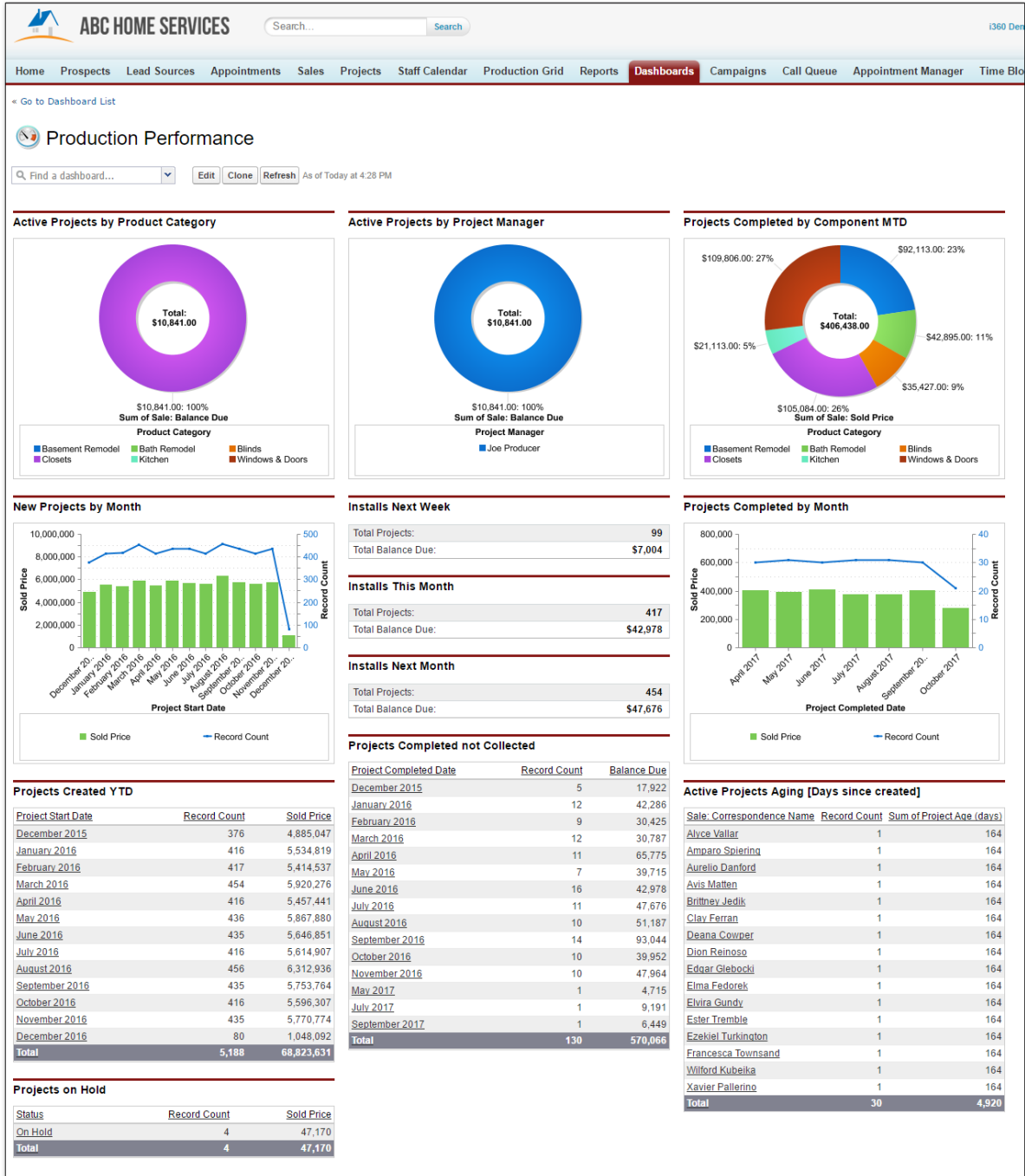
1. **Sale \$ by Rep - WTD** - total sold dollars by rep this week.
2. **Sale \$ by Rep - MTD** - total sold dollars by rep this month.
3. **Sale \$ by Rep - YTD** - total sold dollars by rep this year.
4. **Average Sold Amount by Rep - YTD** - the average sold price by rep this year.
5. **Net Sold % by Rep - YTD** - the NSP percent by rep this year.
6. **Sales by Month - YTD** - a line graph of all Sales made this year by month.
7. **All Canceled Sales by Rep** - a count of all Canceled Sales by rep with a sum of the lost revenue.
8. **Gross vs Net Sales - YTD** - a count of all Sales made this year by rep including gross vs net revenue.
9. **Sales Not Net - 7 + Days** - a list of all Sales in the 'Working' Status that are over 7 days old.
10. **All Product Categories Sold - YTD** - a list of all Product Categories Sold this year including the sum of the dollar amount and average unit price.
11. **All Sales with Outstanding Balance** - all Sales with a balance greater than 0 separated by Status.
12. **All Products Sold - YTD** - a list of all Products Sold this year including the sum of the dollar amount and average unit price.
13. **All Sales by Status** - all Sales in the system by Status.

1.16.4 Sales Pace Dashboard



The Sales Pace Dashboard offers projections of Appointments and Sales metrics based upon Appointments Set and Sales made already this year.

1.16.5 Production Performance

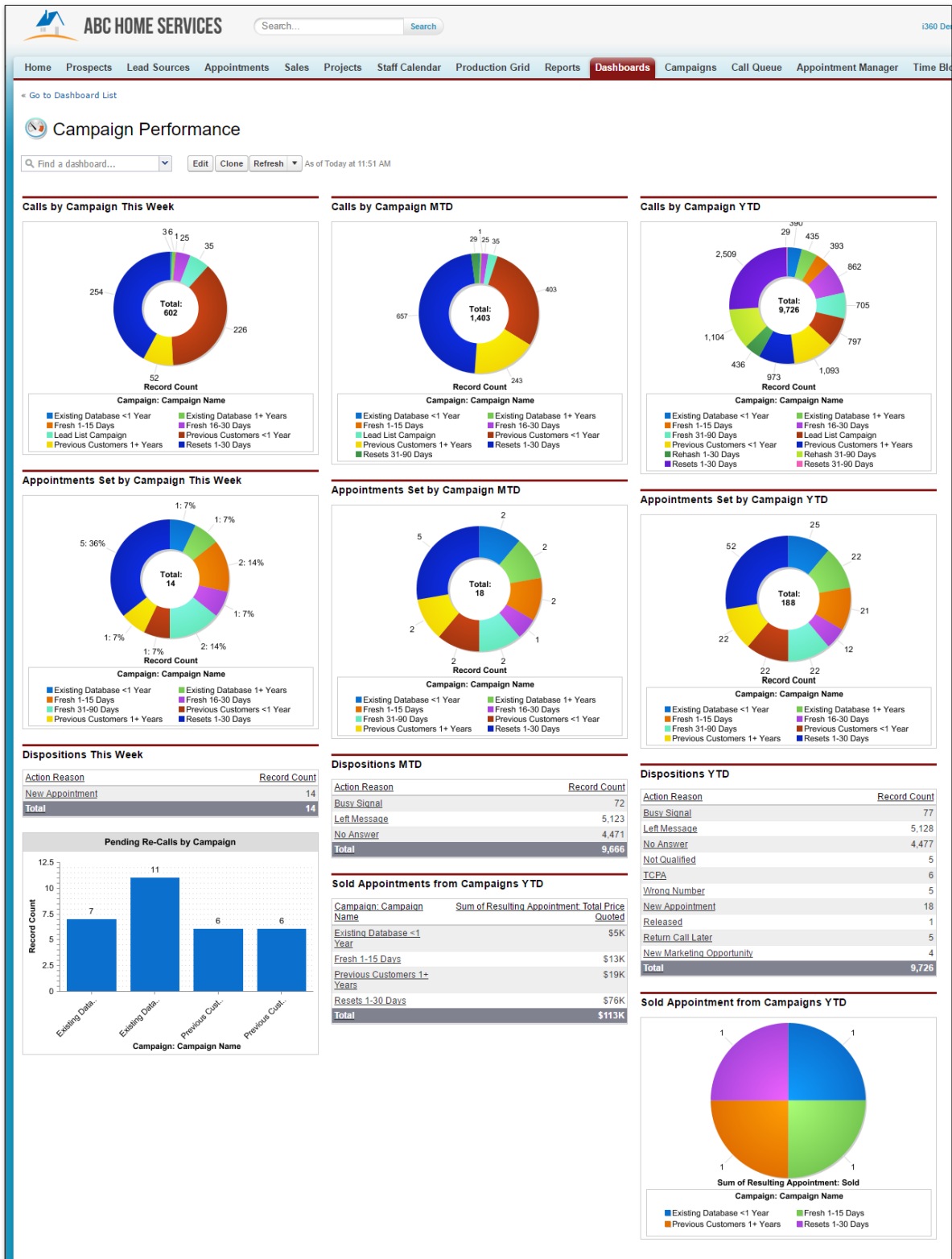


The Production Performance Dashboard offers a look into your active and completed projects in your system including install information.

- Active Projects by Product Category** - all Active Projects by Product Category including the sum of all Balances Due.
- Active Projects by Project Manager** - all Active Projects by Project Manager including the sum of all Balances Due.

3. **Projects Completed by Component MTD** - all completed Projects by Product Category including the sum of all Sold Prices.
4. **New Projects by Month** - all new Projects created by month including Sold Price trends.
5. **Installs Next Week** - a list of all installs scheduled to start next week including the sum of all due balances.
6. **Installs This Month** - a list of all installs scheduled to start this month including the sum of all due balances.
7. **Installs Next Month** - a list of all installs scheduled to start next month including the sum of all due balances.
8. **Projects Completed by Month** - all Projects completed by month including Sold Price trends.
9. **Projects Created YTD** - a list of all Projects created this year by the month the Project started including a count of all Projects and the sum of their Sold Prices.
10. **Projects Completed not Collected** - a list of all completed Projects that still have a balance due by the month the Project was completed.
11. **Active Projects Aging (Days since created)** - a list of all Active Projects not completed over 30 days old.
12. **Projects on Hold** - a count of all Projects in the 'On Hold' Status with the sum of all of their Sold Prices.

1.16.6 Campaign Performance

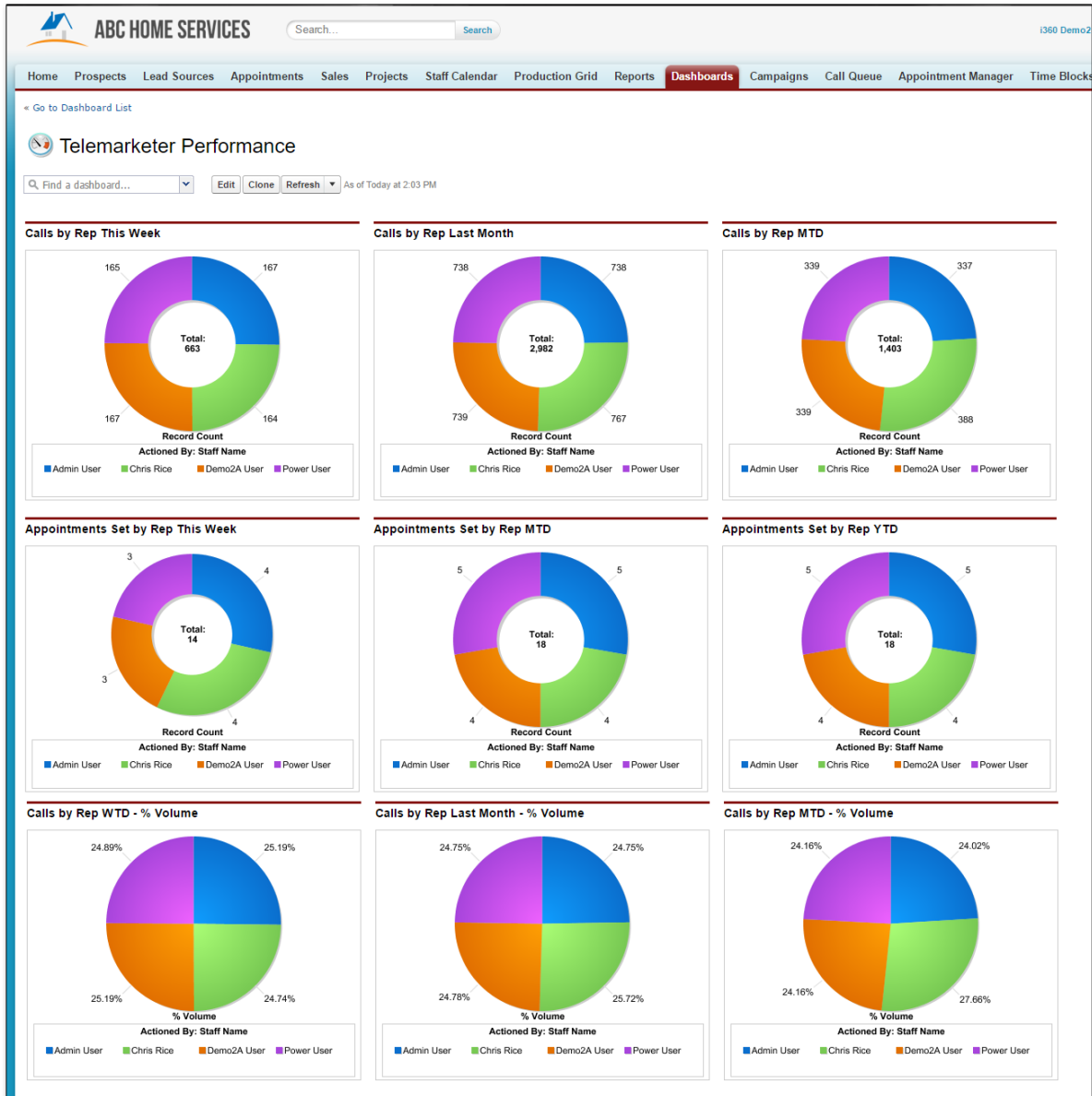


The Campaign Performance Dashboard provides insight into the performance each of your call

Campaigns.

1. **Calls by Campaign This Week** - a donut chart of all calls made this week by Campaign.
2. **Calls by Campaign MTD** - a donut chart of all calls made this month by Campaign.
3. **Calls by Campaign YTD** - a donut chart of all calls made this year by Campaign.
4. **Appointments Set by Campaign This Week** - all Appointments set this week from the Call Queue by Campaign.
5. **Appointments Set by Campaign MTD** - all Appointments set this month from the Call Queue by Campaign.
6. **Appointments Set by Campaign YTD** - all Appointments set this year from the Call Queue by Campaign.
7. **Dispositions This Week** - a list of all calls made this week by disposition.
8. **Dispositions MTD** - a list of all calls made this month by disposition.
9. **Dispositions YTD** - a list of all calls made this year by disposition.
10. **Pending Re-Calls by Campaign** - a count of all incomplete Re-Calls by Campaign.
11. **Sold Appointments from Campaigns YTD** - the sum of all Sold dollars from Appointments set by your Telemarketers by Campaign this year.
12. **Sold Appointments from Campaigns YTD** - a count of all Sold Appointments by Campaign this year.

1.16.7 Telemarketer Performance



The Telemarketer Performance Dashboard breaks down the performance of your call center reps making it easy to measure their performance at a quick glance.

1. **Calls by Rep This Week** - a count of all calls made by Telemarketer including the sum of all calls made this week.
2. **Calls by Rep Last Month** - a count of all calls made by Telemarketer including the sum of all calls made last month.
3. **Calls by Rep MTD** - a count of all calls made by Telemarketer including the sum of all calls made this month.
4. **Appointments Set by Rep This Week** - a count of all Appointments Set by Telemarketer including the sum of sets made this week.

5. **Appointments Set by Rep MTD** - a count of all Appointments Set by Telemarketer including the sum of sets made this month.
6. **Appointments Set by Rep YTD** - a count of all Appointments Set by Telemarketer including the sum of sets made this year.
7. **Calls by Rep WTD - % Volume** - the percent of calls each Telemarketer contributed this week.
8. **Calls by Rep Last Month - % Volume** - the percent of calls each Telemarketer contributed last month.
9. **Calls by Rep MTD - % Volume** - the percent of calls each Telemarketer contributed this month.