



Report Definition Guide

For Sedona Office Version 4.0

Job Management



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Introduction

This Guide was designed to provide a desktop reference to which Sedona Office users may refer when wanting to know detailed information on the functionality of reports available on the Job Management Report Manager Menu. This guide provides an explanation for each element of the data generated on the report as well as a definition of the report selection options. A sample report is provided for each report on the menu.

Custom Job Label

The *Custom Job Label* is designed to print a label for use in labeling kitted parts for jobs to better identify parts staged for installation. The information is designed to fit on a 2 1/8" x 4" label stock designed for pin-fed dot matrix printers. One label will print for each job selected in the job number range.

Information Displayed On the Label

Job Site Address

Job Number

Job Type

System Type

Panel Type

Customer Number

Customer Name

Customer Street Address

Customer City, State, Zip Code

Customer Telephone 1

Site Name

Site Street Address

Site City, State, Zip Code

Site Telephone 1

Salesperson Name

Estimated Start Date

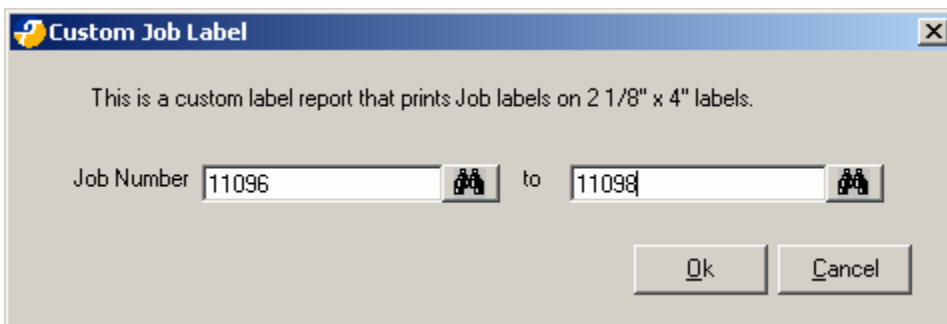
Report Parameters

You will first be prompted to select the printer to which you want the labels to print. Secondly you will select a range of job numbers for which you want to print labels.

Report Selections:

- **Printer** – Select from the drop-down list, the printer to which labels will be printed.
- **Job Numbers** – Select the beginning and ending job numbers for which you want to print labels.

Figure 1. 1 Custom Job Label Parameter Selection Form



The screenshot shows a dialog box titled "Custom Job Label". The text inside the dialog box reads: "This is a custom label report that prints Job labels on 2 1/8" x 4" labels." Below this text, there are two input fields for "Job Number". The first field contains the value "11096" and the second field contains the value "11098". There is a "to" label between the two fields. At the bottom of the dialog box, there are two buttons: "Ok" and "Cancel".

Figure 1. 2 Custom Job Label sample

<p>1234 Main Street 11096 NewResi Burglar Alarm 4160</p> <p>Customer: 16575 Joe Prospect 1234 Main Street Columbus, Ohio 43232 (800) 555-1212</p> <p>Site: Joe Prospect 1234 Main Street Columbus, Ohio 43232 (800) 555-1212</p> <p>Salesperson: Carl Van Wy IV Start Date: 2/4/2006</p>

Estimated vs Actual by Project Manager

Overview

The *Estimated vs Actual by Project Manager* Report is designed to provide a comparison of estimated costs to the actual costs incurred on a job. The report provides information to identify good or poorly performing jobs and provides information grouped by project manager to identify the estimating efficiency of the project manager. This report groups information by the project manager that is assigned to the job on the *Work Order* job form. The dollar estimates for parts, labor, commissions, overhead and other costs is gathered from the Job Costing form. The source for the actual dollar amounts for costs on the report are expenses posted to the job from part issues, labor timesheets and accounts payable bills.

This report prints in two sections; the first section will display a listing of jobs for each project manager. The second section is a summary of each salespersons jobs.

Information Displayed On the Report (Section 1)

Four Lines are displayed for each Job:

- Line 1: This is the job header information and lists the Job Code (job number), Site Name and the Job Type.
- Line 2: Lists the Estimated Costs that were entered on the Job Costing Estimate form.
- Line 3: Lists the Actual Costs that were posted to the job.
- Line 4: Calculates the difference between the estimated costs and the actual costs (Est-Act).

<u>Column Header</u>	<u>Description</u>
Project Manager	The project manager assigned to the job; entered on the Job Work Order form.
Date	The Sold Date of the Job; entered on the Job Work Order form.
Current Status	The Current status of the job; the status of the next unapproved job task. If all tasks have been approved, this is the status of the last job task.
Est/Act Parts	Line 2 will display the Parts amount entered on the Job Cost Estimate form. Line 3 will display the actual amounts issued to the job. If the job type is set to expense parts when issued, the amount will appear on the report once the issue transaction is posted. If using a material work in process account, these costs will appear on the report once the customer is invoiced and the WIP account is relieved.
Est/Act Labor	Line 2 will display the Labor amount entered on the Job Cost Estimate form. Line 3 will display the total of all labor dollars posted to the job. If labor is being expensed at the time of entry, these costs will appear on the report as timesheets are posted. If labor is being expensed to a work in process account, these costs will appear on the report once the customer is invoiced and the WIP account is relieved.
Est/Act Commissions	Line 2 will display the Commission amount entered on the Job Cost Estimate form. Line 3 will display the total of all commission dollars posted to the job. If commissions are being expensed at the time of entry, these costs will appear on the report as commissions are entered into the job and saved. If commissions are being expensed to a work in process account, these costs will appear on the report once the customer is invoiced and the WIP account is relieved.

Est/Act Overhead	<p>Line 2 will display the Overhead amount entered on the Job Cost Estimate form.</p> <p>Line 3 will display the total of all overhead dollars posted to the job. Since the overhead calculation is based on the amount of labor posted to the job; if labor is being expensed at the time of entry, these costs will appear on the report as timesheets are posted. If labor is being expensed to a work in process account, these costs will appear on the report once the customer is invoiced and the WIP account is relieved.</p>
Est/Act Other	<p>Line 2 will display the Other amount entered on the Job Cost Estimate form.</p> <p>Line 3 The total of all Other costs posted to the job. Other costs typically are posted to jobs through accounts payable transactions. If the job costing type of "O" is selected on the expense tab of an A/P bill that is linked to a job, these amounts will appear on the report.</p>
Est/Act Total	<p>Line 2 will display the total of all estimated costs.</p> <p>Line 3 will display the total of all actual costs posted to the job.</p>
%	<p>Line 4 calculates the percentage of estimated costs expended on the job. A positive value indicates the job was completed under the estimate, whereas a negative value indicates the job was completed over the estimate. The formula used is (estimated amount – actual amount) / estimated amount.</p>

Report Parameters

Depending on the parameters selected, the report will display different information. Selecting a Sold Date range will display all jobs sold within the date range.

Report Selections:

- **Sold Date** – (optional) Enter the date range for which you want to print the report. This is the *sold date* entered on the Job Work Order form. If you leave the Sold Date range blank, the report will be generated for all jobs ever created.
- **Department** – The department is that to which the project manager for the job is assigned (Employee setup table). You may select one, multiple or all departments on the list. To select multiple departments, highlight the first department, then hold down the CTRL key and select other departments to include in the report. To include all departments, highlight All, which is at the top of the list. If you do not make specific selections, All departments is the report default.
- **Project Manager** – You may select one, multiple or all project managers on the list. To select multiple project managers, highlight the first project manager, then hold down the CTRL key and select other project managers to include in the report. To include all project managers, highlight All, which is at the top of the list. If you do not make specific selections, All project managers is the report default.

Figure 1. 3 Estimated vs Actual by Project Manager Report Parameter Selection Form

The screenshot shows a window titled "Job Estimate vs Actual by Project Manager". Inside, there is a "Selections" section. Under "Sold Date", there are two date pickers labeled "From Date" and "Thru Date". Below that are two list boxes. The "Department" list has "All" selected, with other options including Admin, Core, CS, Inside Sales, Installation, Kansas, Outside Sales, Outside Sales-Resi, Retail, and Sales. The "Project Manager" list has "All" selected, with other names including Carolyn Ashley, Crystal Augustine, Lisa Brown, Bill Corwin, John Freeman, Brent Luark, Arlyce Nietfeld, and Al Ruble. At the bottom right are "Ok" and "Close" buttons.

Figure 1. 4 Estimated vs Actual by Project Manager Report Section 1

Project Manager		Date	Current Status	Est/Act Parts	Est/Act Labor	Est/Act Commissions	Est/Act Other	Est/Act O/H	Est/Act Total	%
March 12, 2006 6:24 AM Job Estimated vs Actual Cost by Project Manager Sold Between 2/3/2006 - 2/23/2006 Sales Page # 1										
Job Code:	11096	Job Name: Joe Prospect		Job Type: NewResi						
Bill Corwin	2/3/2006	Invoice	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
			<u>\$529.54</u>	<u>\$15.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$544.54</u>	
			(\$529.54)	(\$15.00)	\$0.00	\$0.00	\$0.00	\$0.00	(\$544.54)	0.00%
Job Code:	11098	Job Name: Carrollton BP/ Amoco		Job Type: New						
Bill Corwin	2/14/2006	Complete	\$585.47	\$80.00	\$898.02	\$10.00	\$0.00	\$0.00	\$1,573.49	
			<u>\$500.65</u>	<u>\$72.00</u>	<u>\$898.02</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$1,470.67</u>	
			\$84.82	\$8.00	\$0.00	\$10.00	\$0.00	\$102.82	\$102.82	6.53%
Job Code:	11099	Job Name: Jensen, Mary		Job Type: Comm HB						
Bill Corwin	2/15/2006	Job Complete	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
			<u>\$15.50</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$15.50</u>	
			(\$15.50)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$15.50)	0.00%
Job Code:	11100	Job Name: Holst, Bob		Job Type: NewResi						
Bill Corwin	2/4/2006	Install	\$82.32	\$80.00	\$55.61	\$10.00	\$0.00	\$0.00	\$227.93	
			<u>\$144.07</u>	<u>\$60.00</u>	<u>\$55.61</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$259.68</u>	
			(\$61.75)	\$20.00	\$0.00	\$10.00	\$0.00	\$0.00	(\$31.75)	-13.93%
Job Code:	11102	Job Name: Smith, Teresa		Job Type: CounterSale						
Lisa Brown	2/22/2006	Complete	\$35.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$35.00	
			<u>\$5.95</u>	<u>\$0.00</u>	<u>\$3.50</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$9.45</u>	
			\$29.05	\$0.00	(\$3.50)	\$0.00	\$0.00	\$0.00	\$25.55	73.00%

Figure 1. 5 Estimated vs Actual by Project Manager Report Section 2

Sales Person		Est/Act Parts	Est/Act Labor	Est/Act Commission	Est/Act Other	Est/Act O/H	Est/Act Total	%
March 12, 2006 6:24 AM Job Estimated vs Actual Cost by Project Manager Sold Between 2/3/2006 - 2/23/2006 Page # 1								
Lisa Brown		\$35.00	\$0.00	\$0.00	\$0.00	\$0.00	\$35.00	
		<u>\$5.95</u>	<u>\$0.00</u>	<u>\$3.50</u>	<u>\$84.90</u>	<u>\$0.00</u>	<u>\$94.35</u>	
		\$29.05	\$0.00	(\$3.50)	(\$84.90)	\$0.00	(\$59.35)	-169.57%
Carl Van Wy IV		\$667.79	\$160.00	\$953.63	\$20.00	\$0.00	\$1,801.42	
		<u>\$1,321.98</u>	<u>\$147.00</u>	<u>\$953.63</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$2,422.61</u>	
		(\$654.19)	\$13.00	\$0.00	\$20.00	\$0.00	(\$621.19)	-34.48%

Estimated vs Actual by Salesperson

Overview

The *Estimated vs Actual by Salesperson* Report is designed to provide a comparison of estimated costs to the actual costs incurred on a job. The report provides information to identify good or poorly performing jobs and provides information grouped by salesperson to identify the estimating efficiency of the salesperson. This report groups information by the salesperson that is assigned to the job on the *Work Order* job form. The dollar estimates for parts, labor, commissions, overhead and other costs is gathered from the Job Costing form. The source for the actual dollar amounts for costs on the report are expenses posted to the job from part issues, labor timesheets and accounts payable bills.

This report prints in two sections; the first section will display a listing of jobs for each salesperson (page break after each salesperson). The second section is a summary of each salespersons jobs.

Information Displayed On the Report (Section 1)

Four Lines are displayed for each Job:

- Line 1: This is the job header information and lists the Job Code (job number), Site Name and the Job Type.
- Line 2: Lists the Estimated Costs that were entered on the Job Costing Estimate form.
- Line 3: Lists the Actual Costs that were posted to the job.
- Line 4: Calculates the difference between the estimated costs and the actual costs (Est-Act).

Column Header

Description

Salesperson	The salesperson assigned to the job; entered on the Job Work Order form.
Date	The Sold Date of the Job; entered on the Job Work Order form.
Current Status	The Current status of the job; the status of the next unapproved job task. If all tasks have been approved, this is the status of the last job task.
Est/Act Parts	Line 2 will display the Parts amount entered on the Job Cost Estimate form. Line 3 will display the actual amounts issued to the job. If the job type is set to expense parts when issued, the amount will appear on the report once the issue transaction is posted. If using a material work in process account, these costs will appear on the report once the customer is invoiced and the WIP account is relieved.
Est/Act Labor	Line 2 will display the Labor amount entered on the Job Cost Estimate form. Line 3 will display the total of all labor dollars posted to the job. If labor is being expensed at the time of entry, these costs will appear on the report as timesheets are posted. If labor is being expensed to a work in process account, these costs will appear on the report once the customer is invoiced and the WIP account is relieved.
Est/Act Commissions	Line 2 will display the Commission amount entered on the Job Cost Estimate form. Line 3 will display the total of all commission dollars posted to the job. If commissions are being expensed at the time of entry, these costs will appear on the report as commissions are entered into the job and saved. If commissions are being expensed to a work in process account, these costs will appear on the report once the customer is invoiced and the WIP account is relieved.

Est/Act Overhead	<p>Line 2 will display the Overhead amount entered on the Job Cost Estimate form.</p> <p>Line 3 will display the total of all overhead dollars posted to the job. Since the overhead calculation is based on the amount of labor posted to the job; if labor is being expensed at the time of entry, these costs will appear on the report as timesheets are posted. If labor is being expensed to a work in process account, these costs will appear on the report once the customer is invoiced and the WIP account is relieved.</p>
Est/Act Other	<p>Line 2 will display the Other amount entered on the Job Cost Estimate form.</p> <p>Line 3 The total of all Other costs posted to the job. Other costs typically are posted to jobs through accounts payable transactions. If the job costing type of "O" is selected on the expense tab of an A/P bill that is linked to a job, these amounts will appear on the report.</p>
Est/Act Total	<p>Line 2 will display the total of all estimated costs.</p> <p>Line 3 will display the total of all actual costs posted to the job.</p>
%	<p>Line 4 calculates the percentage of estimated costs expended on the job. A positive value indicates the job was completed under the estimate, whereas a negative value indicates the job was completed over the estimate. The formula used is (estimated amount – actual amount) / estimated amount.</p>

Report Parameters

Depending on the parameters selected, the report will display different information. Selecting a Sold Date range will display all jobs sold within the date range.

Report Selections:

- **Sold Date** – (optional) Enter the date range for which you want to print the report. This is the *sold date* entered on the Job *Work Order* form. If you leave the Sold Date range blank, the report will be generated for all jobs ever created.
- **Department** – The department is that to which the salesperson for the job is assigned (Employee setup table). You may select one, multiple or all departments on the list. To select multiple departments, highlight the first department, then hold down the CTRL key and select other departments to include in the report. To include all departments, highlight All, which is at the top of the list. If you do not make specific selections, All departments is the report default.
- **Salesperson** – You may select one, multiple or all salespersons on the list. To select multiple salespersons, highlight the first salesperson, then hold down the CTRL key and select other salespersons to include in the report. To include all salespersons, highlight All, which is at the top of the list. If you do not make specific selections, All salespersons is the report default.

Figure 1. 6 Estimated vs Actual by Salesperson Report Parameter Selection Form

The screenshot shows a dialog box titled "Estimate vs Actual by Salesperson". It features a "Selections" section with three sub-sections: "Sold Date" containing two date pickers for "Sold From Date" and "Sold To Date"; "Department" containing a list box with "All" selected at the top, followed by Admin, Core, CS, Inside Sales, Installation, Kansas, Outside Sales, Outside Sales-Resi, Retail, and Sales; and "Salesperson" containing a list box with "All" selected at the top, followed by Scott Applen, Chris Beach, Diane Bonta, Lisa Brown, Bill Corwin, Bryan Fraizer, Carolyn Johnson, Denise Key, and Michele Light. At the bottom right are "Ok" and "Close" buttons.

Figure 1. 7 Estimated vs Actual by Salesperson Report Section 1

Sales Person		Date	Current Status	Est/Act Parts	Est/Act Labor	Est/Act Commissions	Est/Act Other	Est/Act O/H	Est/Act Total	%
Job Code: 11096		Job Name: Joe Prospect		Job Type: NewResi						
Carl Van Wy	2/3/2006	Invoice		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
	2/3/2006	Invoice		<u>\$529.54</u>	<u>\$15.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$544.54</u>	
	2/3/2006	Invoice		(\$529.54)	(\$15.00)	\$0.00	\$0.00	\$0.00	(\$544.54)	0.00%
Job Code: 11098		Job Name: Carrollton BP/ Amoco		Job Type: New						
Carl Van Wy	2/14/2006	Complete		\$585.47	\$80.00	\$898.02	\$10.00	\$0.00	\$1,573.49	
	2/14/2006	Complete		<u>\$500.65</u>	<u>\$72.00</u>	<u>\$898.02</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$1,470.67</u>	
	2/14/2006	Complete		\$84.82	\$8.00	\$0.00	\$10.00	\$0.00	\$102.82	6.53%
Job Code: 11099		Job Name: Jensen, May		Job Type: Comm HB						
Carl Van Wy	2/15/2006	Job Complete		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
	2/15/2006	Job Complete		<u>\$15.50</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$15.50</u>	
	2/15/2006	Job Complete		(\$15.50)	\$0.00	\$0.00	\$0.00	\$0.00	(\$15.50)	0.00%
Job Code: 11100		Job Name: Holst, Bob		Job Type: NewResi						
Carl Van Wy	2/4/2006	Install		\$82.32	\$80.00	\$55.61	\$10.00	\$0.00	\$227.93	
	2/4/2006	Install		<u>\$144.07</u>	<u>\$60.00</u>	<u>\$55.61</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$259.68</u>	
	2/4/2006	Install		(\$61.75)	\$20.00	\$0.00	\$10.00	\$0.00	(\$31.75)	-13.93%

Figure 1. 8 Estimated vs Actual by Salesperson Report Section 2

Sales Person		Est/Act Parts	Est/Act Labor	Est/Act Commissions	Est/Act Other	Est/Act O/H	Est/Act Total	%
Carl Van Wy IV		\$667.79	\$160.00	\$953.63	\$20.00	\$0.00	\$1,801.42	
		<u>\$1,321.98</u>	<u>\$147.00</u>	<u>\$953.63</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$2,422.61</u>	
		(\$654.19)	\$13.00	\$0.00	\$20.00	\$0.00	(\$621.19)	-34.48%

Job Commissions

Overview

The *Job Commissions* Report is designed to provide a listing of all commissions due to a salesperson that were posted to a job. Data source for this report is the commission lines entered on the Job Commission form. This report is grouped first by salesperson or department, with a page break after each different salesperson or department. The last page of the report is a summary with the total for each salesperson grouped by commission type. Commission types are defined in Sedona Setup.

Information Displayed On the Report (Section 1)

<u>Column Header</u>	<u>Description</u>
Salesperson	The salesperson assigned to the job; entered on the Job Work Order form.
Site	The name of the site and the street address where the system is being installed.
Job Code	Job Number assigned to the job.
Job Type	The Job Type entered on the Job Work Order form.
Date	The Sold Date of the Job; entered on the Job Work Order form.
Current Status	The Current status of the job; the status of the next unapproved job task. If all tasks have been approved, this is the status of the last job task.
RMR Amount	The total of all recurring monthly revenue lines that were entered for the job.
Install Amount	The total of all install charge lines that were entered for the job.
Commission Type	One line will be displayed for each unique commission type entered on the Job Commission form.
Commission Amount	A total amount will be displayed for each unique commission type entered on the Job Commission form.

Report Parameters

Depending on the parameters selected, the report will display different information. Selecting a Sold Date range will display all jobs sold within the date range.

Report Selections:

- **Sold Date** – (optional) Enter the date range for which you want to print the report. This is the *sold date* entered on the Job *Work Order* form. If you leave the Sold Date range blank, the report will be generated for all jobs ever created.
- **Department** – The department is that to which the salesperson for the job is assigned (Employee setup table). You may select one, multiple or all departments on the list. To select multiple departments, highlight the first department, then hold down the CTRL key and select other departments to include in the report. To include all departments, highlight All, which is at the top of the list. If you do not make specific selections, All departments is the report default.
- **Salesperson** – You may select one, multiple or all salespersons on the list. To select multiple salespersons, highlight the first salesperson, then hold down the CTRL key and select other salespersons to include in the report. To include all salespersons, highlight All, which is at the top of the list. If you do not make specific selections, All salespersons is the report default.

Report Options:

- **Breakout by Salesperson** – Selecting this option will sort and group the report by the Salesperson assigned to the job on the Job Work Order form.
- **Breakout by Department** – Selecting this option will sort and group the report by the Department to which the salesperson on the job is assigned.
- **Show Job Totals** – Selecting this option will print a subtotal of the total commission amount for each job number.

Figure 1. 9 Job Commissions Report Parameter Selection Form

The screenshot shows a software window titled "Job Commissions" with a standard Windows-style title bar. The main content area is divided into three sections:

- Selections:**
 - Sold Date:** Two date pickers labeled "From Date" and "To Date".
 - Department:** A list box containing "All", "Admin", "Core", "CS", "Inside Sales", "Installation", "Kansas", "Outside Sales", "Outside Sales-Resi", and "Retail". "All" is selected.
 - Salesperson:** A list box containing "All", "Scott Applen", "Chris Beach", "Diane Bonta", "Lisa Brown", "Bill Corwin", "Bryan Fraizer", "Carolyn Johnson", and "Denise Key". "All" is selected.
- Options:**
 - Two radio buttons: "Breakout By Salesperson" (selected) and "Breakout By Department".
 - A checked checkbox labeled "Show Job Totals".

At the bottom right of the window are "Ok" and "Close" buttons.

Figure 1. 10 Job Commissions Report Section 1 (detail by Salesperson)

March 12, 2006 7:08 AM		Job Commissions				Page # 2				
		Jobs Sold: 2/3/2006 - 2/23/2006 Carl Van Wy IV								
<u>Sales Person</u>	<u>Site</u>	<u>Job Code</u>	<u>Job Type</u>	<u>Date</u>	<u>Current Status</u>	<u>RMR Amount</u>	<u>Install Amount</u>	<u>Commission Type</u>	<u>Commission Amount</u>	
Carl Van Wy IV	Carrollton BP/ Amoco, 918 E	11098	New	2/14/2006	Complete	\$76.74	\$5,200.00	Installation	\$780.00	
					Complete	\$76.74	\$5,200.00	Parts	\$50.00	
					Complete	\$76.74	\$5,200.00	Recurring	\$68.02	
									<hr/>	
									\$898.02	
	Holst, Bob, 4206 92nd Ct.	11100	NewResi	2/4/2006	Install	\$14.95	\$150.00	Installation	\$36.20	
					Install	\$14.95	\$150.00	Parts	\$13.70	
					Install	\$14.95	\$150.00	Recurring	\$26.91	
									<hr/>	
									\$76.81	
									<hr/>	
									\$974.83	

Figure 1. 11 Job Commissions Report Section 2 (Summary by Salesperson)

March 12, 2006 7:08 AM		Job Commission Summary		Page # 3	
		Jobs Sold: 2/3/2006 - 2/23/2006			
<u>Sales Person</u>	<u>Commission Type</u>	<u>Commission Amount</u>			
Lisa Brown	Parts	\$3.50			
		<hr/>			
		\$3.50			
Carl Van Wy IV	Installation	\$816.20			
	Parts	\$63.70			
	Recurring	\$94.93			
		<hr/>			
		\$974.83			

Job Listing

Overview

The *Job Listing* Report is designed to provide a listing which includes detailed information about jobs. Depending on the parameters selected, the report may be used to view only current jobs in process or jobs in process, closed jobs and reversed jobs. This report includes original jobs and any change orders created for the job. Totals for all jobs on the report will be printed at the bottom of the last page Install Charges, Install Charges Invoiced and Part Charges. The main selection field for this report is the sold date of the job. The Sold Date is entered on the Job Work Order form.

Depending on the sort options selected, the report may be sorted by customer name, customer number, job number or salesperson. Additional options are available to select particular job statuses, job types, install companies, installers, or systems types.

Information Displayed On the Report

<u>Column Header</u>	<u>Description</u>
Job Information	Line 1: Job Number Line 2: Job Type Line 3: Job Status Line 4: Sold Date
Customer	Line 1: Customer Number Line 2: Customer Name Line 3: Customer Street Address Line 4: Customer City, State and Zip Code
Site	Line 1: Site Name Line 2: Site Street Address Line 3: Site City, State and Zip Code
Alarm Account	The Alarm Account number entered or selected on the Job System form.
Panel Type	The Panel Type entered or defaulted from an existing system.
System Code	The System Type entered or defaulted in from an existing system.
Install Charges	The amount of install charges entered on the job.
Install Amt Invoiced	The amount of install charges that have been invoiced as of the report date.
Adv Deposit Amt	The amount of advance deposits received against the job as of the report date.
Part Charges	The amount of parts to be invoiced on the job.
RMR	The total recurring monthly revenue entered for the job.
RMR Activated	The total recurring monthly revenue that has been invoiced for the job as of the report date.
Salesperson	The salesperson entered on the job Work Order form.
Job Schedule Start	The first appointment scheduled for the job.
Job Schedule End	The last appointment or ending appointment date scheduled for the job.
Installer	The name of the installer selected on the job Work Order form.
Job Start	The date of the first timesheet entered for the job.
Job End	The job end date entered during the job closing process.

Report Parameters

Depending on the parameters selected, the report will display different information. Selecting a Sold Date range will display all jobs sold within the date range. If you leave the Sold Date range blank, the report will be generated for all jobs ever created.

Report Selections:

- **Department** – The department is that to which the salesperson for the job is assigned (Employee setup table). You may select one, multiple or all departments on the list. To select multiple departments, highlight the first department, then hold down the CTRL key and select other departments to include in the report. To include all departments, highlight All, which is at the top of the list. If you do not make specific selections, All departments is the report default.
- **Salesperson** – You may select one, multiple or all salespersons on the list. To select multiple salespersons, highlight the first salesperson, then hold down the CTRL key and select other salespersons to include in the report. To include all salespersons, highlight All, which is at the top of the list. If you do not make specific selections, All salespersons is the report default.
- **Show Each Department** – Report Option; if this box is checked, the report header will display and page break on each unique department. If this box is unchecked, no department name will display on the page header.
- **Sold Date** – (optional) Enter the date range for which you want to print the report. This is the *sold date* entered on the *Job Work Order* form.
- **Install Company** - You may select one, multiple or all install companies on the list. To select multiple install companies, highlight the first install company, then hold down the CTRL key and select other install companies to include in the report. To include all install companies, highlight All, which is at the top of the list. If you do not make specific selections, All install companies is the report default.
- **Installer** - You may select one, multiple or all installers on the list. To select multiple installers, highlight the first installer, then hold down the CTRL key and select other installers to include in the report. To include all installers, highlight All, which is at the top of the list. If you do not make specific selections, All installers is the report default.
- **Job Status** - You may select one, multiple or all Job Statuses on the list. To select multiple Job Statuses, highlight the first Job Status, then hold down the CTRL key and select other Job Statuses to include in the report. To include all Job Statuses, highlight All, which is at the top of the list. If you do not make specific selections, All Job Statuses is the report default.

Job Status Options

- **Hide Closed Jobs** – if this checkbox is selected, closed jobs within the sold date range selected will not be displayed on the report.
- **Hide Reversed Jobs** - if this checkbox is selected, reversed jobs within the sold date range selected will not be displayed on the report.
- **Job Type** - You may select one, multiple or all Job Types on the list. To select multiple Job Types, highlight the first Job Type, then hold down the CTRL key and select other Job Types to include in the report. To include all Job Types, highlight All, which is at the top of the list. If you do not make specific selections, All Job Types is the report default.
- **System Type** - You may select one, multiple or all System Types on the list. To select multiple System Types, highlight the first System Type, then hold down the CTRL key and select other System Types to include in the report. To include all System Types, highlight All, which is at the top of the list. If you do not make specific selections, All System Types is the report default.

Report Options:

- **Sort** – You have the option of sorting the report from one of the items in the drop-down list including: customer name, customer number, job number or salesperson.
- **Options** – You have the option of printing the comment entered on a particular job task or the comment entered on the last job task approved.
- **Show Job Totals** – Selecting this option will print a subtotal of the total commission amount for each job number.

Figure 1. 12 Job Listing Report Parameter Selection Form

The screenshot shows a software window titled "Job Listing" with a close button in the top right corner. The window contains a "Selections" area with the following controls:

- Department:** A list box containing "All", "Admin", "Core", "CS", "Inside Sales", "Installation", "Kansas", and "Outside Sales". Below it is a checkbox labeled "Show Each Department".
- Salesperson:** A list box containing "All", "Scott Appen", "Chris Beach", "Diane Bonta", "Lisa Brown", "Bill Corwin", and "Bryan Fraizer".
- Sold Date:** Two date pickers labeled "From" and "Thru". The "From" date is 3/1/2006 and the "Thru" date is 3/31/2006.
- Job Status:** A dropdown menu set to "All", and two checkboxes: "Hide 'Closed' jobs" and "Hide 'Reversed' jobs".
- Install Company:** A dropdown menu set to "All".
- Job Type:** A dropdown menu set to "All".
- Installer:** A dropdown menu set to "All".
- System Type:** A dropdown menu set to "All".
- Sort:** A dropdown menu set to "Customer Name". A secondary dropdown menu is open, showing options: "Sort", "Customer Name", "Customer Number", "Job Number", and "Salesperson".
- Options:** A checkbox labeled "Show Last Task Comments for Task ..." and a dropdown menu set to "Show the Last Task".

At the bottom right of the window are two buttons: "Ok" and "Close".

Figure 1. 13 Job Listing Report

Job Information		Customer	Site	Alarm Account Panel Type System Code	Install Charges Install Amt Invoiced Adv Deposit Amt Part Charges RMR Activated	Salesperson Job Schedule Start Job Schedule End Installer Job Start
11098		10013	Carrollton BP/ Amoco	10013-001	\$5,200.00	Carl Van Wy IV
New Commercial		Carrollton BP/ Amoco	918 E Benton ST		\$5,700.00	2/15/2006
Complete		918 E Benton ST	Carrollton, MO 64633	Access	\$0.00	2/15/2006
2/14/2006		Carrollton, MO 64633	(660) 542-0055		\$500.00	Chris Schuler
					\$76.74	2/15/2006
					\$76.74	
11100		10009	Bob Holst	10009	\$150.00	Carl Van Wy IV
NewResi		Holst, Bob	4206 92nd Ct.		\$241.34	2/6/2006
Install		4206 92nd Ct.	Urbandale, IA 50322	GMA	\$0.00	2/6/2006
2/4/2006		Urbandale, IA 50322	278-8873		\$91.34	
					\$14.95	2/6/2006
					\$14.95	
11099		900	Mary Jensen	AF332	\$1,000.00	Carl Van Wy IV
Comm HB 10%		Jensen, Mary	5787 Coachlight Ct.		\$1,085.00	
Job Complete		5787 Coachlight Ct.	WestDes Moines, IA 50266	Access	\$0.00	
2/15/2006		WestDes Moines, IA 50266	224-1388		\$0.00	
					\$0.00	2/15/2006
11099 - 1		900	Mary Jensen	holdback-01	\$0.00	Carl Van Wy IV
Comm HB 10%		Jensen, Mary	5787 Coachlight Ct.		\$0.00	
Re-Opened		5787 Coachlight Ct.	WestDes Moines, IA 50266	Access	\$0.00	
2/21/2006		WestDes Moines, IA 50266	224-1388		\$85.00	
					\$0.00	
					\$0.00	
11096		16575	Joe Prospect	16575-01	\$2,299.95	Carl Van Wy IV
NewResi		Joe Prospect	1234 Main Street	4160	\$0.00	
Invoice		1234 Main Street	Columbus, OH 43232	Burglar Alarm	\$0.00	
2/3/2006		Columbus, OH 43232	(800) 555-1212		\$0.00	2/4/2006
					\$0.00	
					\$0.00	
					\$8,649.95	
					\$7,026.34	
					\$676.34	

Job Open Billing

Overview

The *Job Open Billing* Report is designed to provide a listing which includes Jobs with amounts that have not been invoiced. Un-invoiced amounts are broken down into three categories; install charges, parts and recurring monthly revenue. The main selection field for this report is the sold date of the job. The Sold Date is entered on the Job Work Order form.

Depending on the sort options selected, the report may be sorted by customer name, customer number or job number. Additional options are available to select particular job statuses, job types, install companies, or installers.

Information Displayed On the Report

<u>Column Header</u>	<u>Description</u>
Job Number	Line 1: Job Number
Type	Line 2: Job Type
Status	Line 3: The Current status of the job; the status of the next unapproved job task. If all tasks have been approved, this is the status of the last job task.
Customer Number	Line 1: Customer Number
Name	Line 2: Customer Name
System Type	Line 3: The System Type entered or defaulted in from an existing system.
Salesperson	The salesperson entered on the job Work Order form.
Installer	The name of the Installer selected on the job Work Order form.
Date Sold	The Sold Date of the Job; entered on the Job Work Order form.
Install Charges	The total amount of install charges entered on the job.
Amount Invoiced	The amount of install charges that have been invoiced as of the report date.
Open Amount	The amount of install charges left to invoice against the job as of the report date.
Part Charges	The total amount of part charges entered on the job.
Amount Invoiced	The amount of part charges that have been invoiced as of the report date.
Open Amount	The amount of part charges left to invoice against the job as of the report date.
RMR Charges	The total amount of recurring monthly revenue charges entered on the job.
Amount Activated	The amount of recurring monthly revenue charges that have been invoiced as of the report date.
Remaining Amount	The amount of recurring monthly revenue charges left to invoice against the job as of the report date.

Report Parameters

Depending on the parameters selected, the report will display different information. Selecting a Sold Date range will display all jobs sold within the date range. If you leave the Sold Date range blank, the report will be generated for all jobs ever created.

Report Selections:

- **Sold Date** – (optional) Enter the date range for which you want to print the report. This is the *sold date* entered on the Job *Work Order* form.
- **Department** – The department is that to which the salesperson for the job is assigned (Employee setup table). You may select one, multiple or all departments on the list. To select multiple departments, highlight the first department, then hold down the CTRL key and select other departments to include in the report. To include all departments, highlight All, which is at the top of the list. If you do not make specific selections, All departments is the report default.
- **Salesperson** – You may select one, multiple or all salespersons on the list. To select multiple salespersons, highlight the first salesperson, then hold down the CTRL key and select other salespersons to include in the report. To include all salespersons, highlight All, which is at the top of the list. If you do not make specific selections, All salespersons is the report default.
- **Job Status** - You may select one, multiple or all Job Statuses on the list. To select multiple Job Statuses, highlight the first Job Status, then hold down the CTRL key and select other Job Statuses to include in the report. To include all Job Statuses, highlight All, which is at the top of the list. If you do not make specific selections, All Job Statuses is the report default.

Job Status Options

- **Exclude Closed Jobs** – if this checkbox is selected, closed jobs within the sold date range selected will not be displayed on the report.
- **Exclude Reversed Jobs** - if this checkbox is selected, reversed jobs within the sold date range selected will not be displayed on the report.
- **Job Type** - You may select one, multiple or all Job Types on the list. To select multiple Job Types, highlight the first Job Type, then hold down the CTRL key and select other Job Types to include in the report. To include all Job Types, highlight All, which is at the top of the list. If you do not make specific selections, All Job Types is the report default.
- **Installer** - You may select one, multiple or all installers on the list. To select multiple installers, highlight the first installer, then hold down the CTRL key and select other installers to include in the report. To include all installers, highlight All, which is at the top of the list. If you do not make specific selections, All installers is the report default.
- **Install Company** - You may select one, multiple or all install companies on the list. To select multiple install companies, highlight the first install company, then hold down the CTRL key and select other install companies to include in the report. To include all install companies, highlight All, which is at the top of the list. If you do not make specific selections, All install companies is the report default.

Report Options:

- **Sort** – You have the option of sorting the report from one of the items in the drop-down list including: customer name, customer number, or job number.

Figure 1. 14 Job Open Billing Report Parameter Selection Form

Open Billings

Selections

Sold Date

From Date: 2/3/2006 To Date: 2/3/2006

Department: All, Admin, Core, CS, Inside Sales, Installation, Kansas, Outside Sales, Outside Sales-Resi

Salesperson: All, Scott Applen, Chris Beach, Diane Bonta, Lisa Brown, Bill Corwin, Bryan Fraizer, Carolyn Johnson

Job Status: All, Exclude 'Closed' jobs, Exclude 'Reversed' jobs

Job Type: All

Installer: All

Install Company: All

Sort: Customer Number, Customer Name, Customer Number, Job Number

Ok Close

Figure 1. 15 Job Open Billing Report

March 12, 2006		Open Billings			Page # 1	
9:12 AM		For Jobs with Sold Dates Between: 2/3/2006 and 2/3/2006 Outside Sales				
Job Number Type Status	Customer Number Name System Type	Salesperson Installer Date Sold	Install Charges Amount Invoiced Open Amount	Part Charges Amount Invoiced Open Amount	RMR Charges Amount Activated Remaining Amount	
11096	16575	Carl Van Wy IV	\$2,299.95	\$0.00		
NewResi	Joe Prospect		\$0.00	\$0.00		\$0.00
Invoice	Burglar Alarm	2/3/2006	\$2,299.95	\$0.00		\$0.00

Job Profit / Loss

Overview

The *Job Profit/Loss* Report is designed to provide information as to the profitability of individual installation jobs. This report is typically run at the end of the month to review all jobs that were closed within a particular accounting period however this report may be generated at any time using any desired date range selections. This report may be generated as a summary or detail report; the summary report will display the totals for all jobs within the date ranges entered and the detail report will display the dollar amounts for each individual job.

This report prints in three sections; the first section will be a listing of all jobs along with the total install charges, costs and RMR. The second section will be grouped by job type. The third section will print the totals grouped by salesperson.

Information Displayed On The Report

<u>Column Header</u>	<u>Description</u>
Install Amount	The total of all install charges invoiced.
Parts (Costs)	The total of all part costs posted to the job. These costs will appear on the report when the parts have been issued to the job.
Labor (Costs)	The total of all labor dollars posted to the job. If labor is being expensed at the time of entry, these costs will appear on the report as timesheets are posted. If labor is being expensed to a work in process account, these costs will appear on the report once the customer is invoiced and the WIP account is relieved.
Commissions (Costs)	The total of all commission dollars posted to the job. If commissions are being expensed at the time of entry, these costs will appear on the report as commissions are entered into the job and saved. If commissions are being expensed to a work in process account, these costs will appear on the report once the customer is invoiced and the WIP account is relieved.
Overhead (Costs)	The total of all overhead dollars posted to the job. Since the overhead calculation is based on the amount of labor posted to the job; if labor is being expensed at the time of entry, these costs will appear on the report as timesheets are posted. If labor is being expensed to a work in process account, these costs will appear on the report once the customer is invoiced and the WIP account is relieved.
Other (Costs)	The total of all Other costs posted to the job. Other costs typically are posted to jobs through accounts payable transactions. If the job costing type of "O" is selected on the expense tab of an A/P bill that is linked to a job, these amounts will appear on the report.
Total Costs	The sum of all parts, labor, commission, overhead and other costs.
Profit / Loss	The total of all install charges less the sum of all costs.
RMR	The total recurring monthly revenue generated.

Report Parameters

Depending on the parameters selected, the report will display different information. By selecting a Sold Date range only will display all jobs sold within the date range. If a Sold Date range and Completed Date range is selected, the report will display all jobs that were opened and/or closed within the date range. By selecting the Completed Date range only, will display all the jobs closed within the date range.

Report Selections:

- **Department** – The department is that to which the salesperson for the job is assigned (Employee setup table). You may select one, multiple or all departments on the list. To select multiple departments, highlight the first department, then hold down the CTRL key and select other departments to include in the report. To include all departments, highlight All, which is at the top of the list. If you do not make specific selections, All departments is the report default.
- **Salesperson** – You may select one, multiple or all salespersons on the list. To select multiple salespersons, highlight the first salesperson, then hold down the CTRL key and select other salespersons to include in the report. To include all salespersons, highlight All, which is at the top of the list. If you do not make specific selections, All salespersons is the report default.
- **Project Manager** – You may select one, multiple or all Project Managers on the list. To select multiple project managers, highlight the first project manager, then hold down the CTRL key and select other project managers to include in the report. To include all project managers, highlight All, which is at the top of the list. If you do not make specific selections, All project managers is the report default.
- **Sold Date** – (optional) Enter the date range for which you want to print the report. This is the *sold date* entered on the Job *Work Order* form.
- **Completed Date** – (optional) Enter the date range for which you want to print the report. This is the *Job End Date* that was entered during the job closing process.

* Note: if no sold date range or completed date range is selected, the report will include all jobs from the beginning of the use of the job management module, which may take some time to generate.

- **Job Type** – You may select one particular job type or All job types. *All* job types is the report default.
- **Sort** – This optional is not currently used.
- **Options** – Show Each Job (Don't Show Summary). If this box is checked, a list of all jobs will be displayed; if unchecked the report will display totals for all jobs within the parameters selected above.

Figure 1. 17 Job Profit/Loss Report Section 1 (Detail View)

March 11, 2006 6:04 PM		Job Profit/Loss by Salesperson Detail							Page # 1		
Sold between 2/3/2006 - 2/23/2006											
All Completed Dates											
All Departments											
All Salespeople											
All Project Managers											
-----Costs-----											
<u>Salesperson</u>	<u>Site Name</u>	<u>Job Number</u>	<u>Install Amount</u>	<u>Parts</u>	<u>Labor</u>	<u>Comm</u>	<u>Overhead</u>	<u>Other</u>	<u>Total Costs</u>	<u>Profit/Loss</u>	<u>RMR</u>
Van Wy IV	Carrollton BP/	11098	5,700.00	500.65	72.00	898.02	0.00	0.00	1,470.67	4,229.33	76.74
	Holst, Bob	11100	241.34	144.07	60.00	55.61	0.00	0.00	259.68	(18.34)	14.95
	Jensen, Mary	11099	976.50	15.50	0.00	0.00	0.00	0.00	15.50	961.00	0.00
	Jensen, Mary	11099 -1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Joe Prospect	11096	0.00	529.54	15.00	0.00	0.00	0.00	544.54	(544.54)	0.00
Brown	Smith, Teresa	11102	35.00	5.95	0.00	3.50	0.00	0.00	9.45	25.55	0.00
			<u>6,952.84</u>	<u>1,195.71</u>	<u>147.00</u>	<u>957.13</u>	<u>0.00</u>	<u>0.00</u>	<u>2,299.84</u>	<u>4,653.00</u>	<u>91.69</u>

Figure 1. 18 Job Profit/Loss Report Section 1 (Summary View)

March 11, 2006 6:07 PM		Job Profit/Loss by Salesperson Detail							Page # 1		
Sold between 2/3/2006 - 2/23/2006											
All Completed Dates											
All Departments											
All Salespeople											
All Project Managers											
-----Costs-----											
<u>Salesperson</u>	<u>Site Name</u>	<u>Job Number</u>	<u>Install Amount</u>	<u>Parts</u>	<u>Labor</u>	<u>Comm</u>	<u>Overhead</u>	<u>Other</u>	<u>Total Costs</u>	<u>Profit/Loss</u>	<u>RMR</u>
All Jobs:			<u>6,952.84</u>	<u>1,195.71</u>	<u>147.00</u>	<u>957.13</u>	<u>0.00</u>	<u>0.00</u>	<u>2,299.84</u>	<u>4,653.00</u>	<u>91.69</u>

Figure 1. 19 Job Profit/Loss Report Section 2

March 11, 2006 6:07 PM	Job Profit/Loss by Job Type							Page # 2	
	Sold between 2/3/2006 - 2/23/2006								
	All Completed Dates All Departments All Salespeople All Project Managers								
	-----Costs-----								
Job Type	Install Charges	Part Charges	Labor	Commissions	Overhead	Other	Total Costs	Profit/Loss	RMR
Comm HB 10%	976.50	15.50	0.00	0.00	0.00	0.00	15.50	961.00	0.00
Counter Sale	35.00	5.95	0.00	3.50	0.00	0.00	9.45	25.55	0.00
New	5,700.00	500.65	72.00	898.02	0.00	0.00	1,470.67	4,229.33	76.74
NewResi	241.34	673.61	75.00	55.61	0.00	0.00	804.22	(562.88)	14.95
	<u>6,952.84</u>	<u>1,195.71</u>	<u>147.00</u>	<u>957.13</u>	<u>0.00</u>	<u>0.00</u>	<u>2,299.84</u>	<u>4,653.00</u>	<u>91.69</u>

Figure 1. 20 Job Profit/Loss Report Section 3

March 11, 2006 6:07 PM	Job Profit/Loss by Salesperson Summary							Page # 3	
	Sold between 2/3/2006 - 2/23/2006								
	All Completed Dates All Departments All Salespeople All Project Managers								
	-----Costs-----								
Salesperson	Install Charges	Part Costs	Labor	Commissions	Overhead	Other	Total Costs	Profit/Loss	RMR
Carl	6,917.84	1,189.76	147.00	953.63	0.00	0.00	2,290.39	4,627.45	91.69
Lisa	35.00	5.95	0.00	3.50	0.00	0.00	9.45	25.55	0.00
	<u>6,952.84</u>	<u>1,195.71</u>	<u>147.00</u>	<u>957.13</u>	<u>0.00</u>	<u>0.00</u>	<u>2,299.84</u>	<u>4,653.00</u>	<u>91.69</u>

Job Utilization

Overview

The *Job Utilization* Report is currently under construction. Please refer back to this guide at a later time for more information.

Jobs Sold

Overview

The *Jobs Sold* Report is designed to provide a listing of jobs that were entered within a particular sold date range. The main selection field for this report is the sold date of the job. The Sold Date is entered on the Job Work Order form.

Depending on the sort options selected, the report may be sorted by customer name, customer number or job number. Additional options are available to select particular job types, or installers.

Information Displayed On the Report

<u>Column Header</u>	<u>Description</u>
Job Number	Job Number assigned to the job.
Job Type	The Job Type selected on the job Work Order form.
Customer Name	The Billing Customer Name assigned to the job.
System Type	The System Type entered or defaulted in from an existing system.
Install Charges	The total amount of install charges entered on the job.
Part Charges	The total amount of part charges entered on the job.
RMR Charges	The total amount of recurring monthly revenue charges entered on the job.
Salesperson	The salesperson entered on the job Work Order form.

Report Parameters

Depending on the parameters selected, the report will display different information. Selecting a Sold Date range will display all jobs sold within the date range. If you leave the Sold Date range blank, the report will be generated for all jobs ever created.

Report Selections:

- **Sold Date** – (optional) Enter the date range for which you want to print the report. This is the *sold date* entered on the *Job Work Order* form.
- **Department** – The department is that to which the salesperson for the job is assigned (Employee setup table). You may select one, multiple or all departments on the list. To select multiple departments, highlight the first department, then hold down the CTRL key and select other departments to include in the report. To include all departments, highlight All, which is at the top of the list. If you do not make specific selections, All departments is the report default.
- **Salesperson** – You may select one, multiple or all salespersons on the list. To select multiple salespersons, highlight the first salesperson, then hold down the CTRL key and select other salespersons to include in the report. To include all salespersons, highlight All, which is at the top of the list. If you do not make specific selections, All salespersons is the report default.
- **Installer** - You may select one, multiple or all installers on the list. To select multiple installers, highlight the first installer, then hold down the CTRL key and select other installers to include in the report. To include all installers, highlight All, which is at the top of the list. If you do not make specific selections, All installers is the report default.
- **Job Type** - You may select one, multiple or all Job Types on the list. To select multiple Job Types, highlight the first Job Type, then hold down the CTRL key and select other Job Types to include in the report. To include all Job Types, highlight All, which is at the top of the list. If you do not make specific selections, All Job Types is the report default.

Report Options:

- **Sort** – You have the option of sorting the report from one of the items in the drop-down list including: customer name, customer number, or job number.

Figure 1. 21 Jobs Sold Report Parameter Selection Form

Figure 1. 22 Jobs Sold Report

March 12, 2006	Jobs Sold						Page # 1
9:52 AM	For Jobs with Sold Dates Between: 2/3/2006 and 2/23/2006						
	Outside Sales						
	Change Orders are Consolidated						
Job Number	Job Type	Customer Name	System Type	Install Charges	Part Charges	RMR Charges	Salesperson
11100	NewResi	Holst, Bob	GMA	\$150.00	\$91.34	\$14.95	Carl Van Wy IV
11098	New Commercial	Carrollton BP/ Amoco	Access	\$5,200.00	\$500.00	\$76.74	Carl Van Wy IV
11096	NewResi	Joe Prospect	Burglar Alarm	\$2,299.95	\$0.00		Carl Van Wy IV
11099	Comm HB 10%	Jensen, Mary	Access	\$1,000.00			Carl Van Wy IV
				\$8,649.95	\$676.34	\$91.69	

Salesperson Job Revenue

Overview

The *Salesperson Job Revenue* Report is designed to provide a listing of jobs that were invoiced during a particular date range. This report is grouped by salesperson (page break after each salesperson) and provides totals for each salesperson. A Grand total for all jobs invoiced is displayed on the last page of the report. The key field on this report is the invoice date entered when the invoice was created and posted.

Information Displayed On the Report

<u>Column Header</u>	<u>Description</u>
Salesperson	The salesperson entered on the job Work Order form.
Job Number	Job Number assigned to the job.
Invoice Number	The invoice number created for the job.
Invoice Date	The date entered in the invoice date field of the invoice form.
Site	The Site name associated with the job.
City	The Site city associated with the job.
State	The Site state associated with the job.
Account	The alarm account number assigned to the job on the job System form.
System	The System Type selected or defaulted on the job System form.
Item	The invoice item code on the invoice.
Recurring Charge	The amount of recurring services invoiced for the item code.
Install Charge	The amount of install charges invoiced for the item code.
Panel	The panel type selected or defaulted on the job System form.

Report Parameters

Depending on the parameters selected, the report will display different information.

Report Selections:

- **Invoice From Date** – Enter the beginning date in the range for which you want to print the report. This is the *invoice date* entered on the Job Invoice form
- **Invoice To Date** – Enter the ending date in the range for which you want to print the report. This is the *invoice date* entered on the Job Invoice form.

Figure 1. 23 Salesperson Job Revenue Report Parameter Selection Form

Figure 1. 24 Salesperson Job Revenue Report

March 12, 2006		Salesperson Job Revenue										Page # 3
10:10 AM		Carl Van Wy IV 2/3/2006 to 2/23/2006										
<u>Salesperson</u>	<u>Job Number</u>	<u>Invoice Number</u>	<u>Invoice Date</u>	<u>Site</u>	<u>City</u>	<u>State</u>	<u>Account</u>	<u>System</u>	<u>Item</u>	<u>Recurring Charge</u>	<u>Install Charge</u>	<u>Panel</u>
Carl Van Wy IV												
	11098	272344	2/6/2006	Carrollton BP/	Carrollton	MO	10013-00	Access	Equipment		500.00	
									Inspection	38.95		
									Install		5,200.00	
	11099	272244	2/15/2006	Jensen, Mary	WestDes	IA			Install		1,000.00	
	11100	272345	2/15/2006	Holst, Bob	Urbandale	IA	10009	GMA	Equipment		9.20	
									Equipment		60.75	
									Equipment		9.52	
									Equipment		11.87	
									Install		150.00	
							10009	GMA	Internet	14.95		
									Carl Van Wy IV Total	<u>53.90</u>	<u>6,941.34</u>	
									Grand Total	<u>53.90</u>	<u>7,976.34</u>	

Technician Schedule

Overview

The *Technician Schedule* Report is designed to provide a listing of jobs and/or service tickets that are scheduled within a particular date range. The key field on this report is the appointment date selected when scheduling an Installer to a job or a technician to a service ticket.

Information Displayed On the Report

<u>Column Header</u>	<u>Description</u>
Appointment	Appointment date scheduled.
Creation Date	The date the job or service ticket was created.
Account #	The alarm account number assigned to the Job or Service Ticket.
Site Info	The site name and address information associated with the Job or Service Ticket.
Sold By	The salesperson assigned to the Job.
Description	The Site name associated with the job.
Job Notes	Job Notes that are entered on the Job Work Order form.
Problem	For Jobs, the job type is displayed; for Service Tickets, the problem code entered on the service ticket form is displayed.
Status	The current status of the Job or Service Ticket.
Job Number	The Job Number will be displayed for installation jobs. The Service Ticket number will be displayed for Service tickets.
Technician	The Installer name (or employee code) will be displayed for installation jobs. The Technician (or employee code) name will be displayed for Service Tickets.
Service Company	The Service Company associated with the system.
Installation Company	The Install Company assigned to the system.

Report Parameters

Depending on the parameters selected, the report will display different information.

Report Selections:

- **Dates (From & To)** – Enter the beginning and ending date in the range for which you want to print the report. This is the *appointment date* entered for a Job or Service Ticket.
- **Tech Type** – You may select Service Technicians, Installers or both.
- **Display** – This option determines whether the employee code or the employee name will print on the report (Employee setup table in Sedona Setup).
- **Technicians / Installers** – You have the option of displaying all or selected Technicians and/or Installers on the report. By default all names are checked; for those names you do not want to include on the report, unchecked the box to the left of the employee name.
- **Service Companies** - You have the option of displaying all or selected Service Companies on the report. By default all Service Companies are checked; for those companies you do not want to include on the report, unchecked the box to the left of the service company name.
- **Installation Companies** - You have the option of displaying all or selected Installation Companies on the report. By default all Installation Companies are checked; for those companies you do not want to include on the report, unchecked the box to the left of the installation company name.

Report Options:

- **Print Each Tech On A Separate page** – By checking this checkbox a new page will begin for each unique Technician or Installer. If this box is left un-checked, all schedules will print without page breaks.
- **Print Service & Install Lists Separately** – If you have selected to print both Service and Install schedules, checking this checkbox will print all Service appointments and then all Installation appointments. If left un-checked the report will sort by the Technician/Installer name or code.
- **Exclude Resolved Service Tickets and Installed Jobs** – By checking this checkbox appointments for service tickets with a resolution code or install jobs that have been closed will not be printed on this report.

