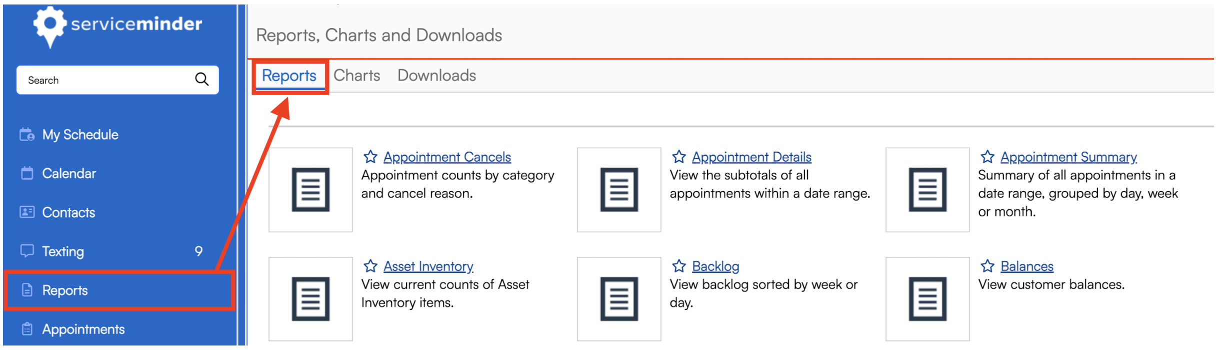
Appointment Reporting

11/18/2025 3:45 pm CST

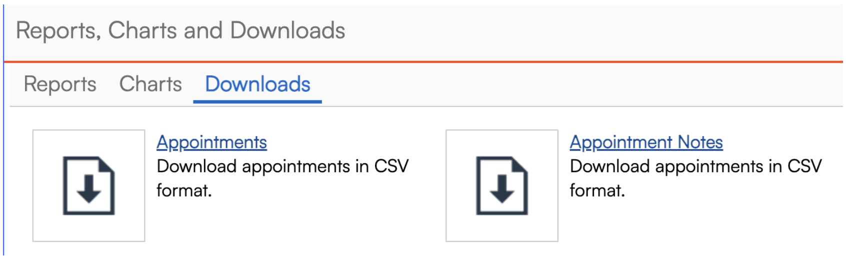
Overview

There are many reports that you can run in service**minder**. These are appointment-specific ones for monthly or year-over-year reporting.

Reports can be found in the navigation menu.



If you go to the **Reports > Downloads tab**, you can also download information about **Appointments**.



This article will review:

- Appointment Summary Report
- Appointment Details Report
- Appointment Cancels Report
- Backlog Report
- Reworks Report
- Services Summary Report
- Appointment Downloads
- FAQs

Appointment Summary Report

The Appointment Summary report provides an overview of all appointments within a specified date range. It summarizes key metrics such as the number of appointments, scheduled vs. actual duration, tax, gross profit, and expenses.

This report shows:

- Total number of appointments per day
- Scheduled vs. actual duration
- Gross profit and expenses
- Tax and adjusted subtotal
- General appointment duration and number of appointments per day
- Some revenue and labor cost/expenses

Appointment Summary Report Filter Settings From 4/1/2025 Through 5/1/2025

Date	Count	Sch Dur	Act Dur	Avg Sch Dur	Avg Act Dur	Gross	Discount	Adj. Subtotal	Tax	Total	Labor	Materials	Expenses
4/1/2025	4	11 hours	10 hours 14 mins	2 hours 45 mins	2 hours 33 mins	$5,909.00	$0.00	$5,909.00	$0.00	$5,909.00	$105.67	$1,139.90	$0.00
4/3/2025	2	1 hour	32 mins	30 mins	16 mins	$201.50	$0.00	$201.50	$0.00	$201.50	$12.50	$0.00	$0.00
4/4/2025	2	5 hours 30 mins	5 mins	2 hours 45 mins	2 mins	$5,525.00	$0.00	$5,525.00	$0.00	$5,525.00	$0.17	$1,088.31	$0.00
4/7/2025	1	2 hours	2 hours	2 hours	2 hours	$2,115.00	$0.00	$2,115.00	$0.00	$2,115.00	$50.00	$551.07	$0.00
4/8/2025	1	30 mins	0 mins	30 mins	0 mins	$570.00	$0.00	$570.00	$0.00	$570.00	$0.00	$82.26	$0.00

Appointment Details Report

This report will allow you to search by client lifetime and average margins. Not only does it show general info such as customer email and service agent info, but also clock-in time, man hours, attached payments, margins, appointment notes, and if there is an attached proposal to the appointment.

This report shows:

- Customer and service agent data (including email and agent info)
- Duration and start/finish times
- Clock-in time and man hours
- Labor hours and labor costs
- Payments, margins, and attached payments
- Appointment notes
- Attached proposals (if applicable)
- Client lifetime and average margins

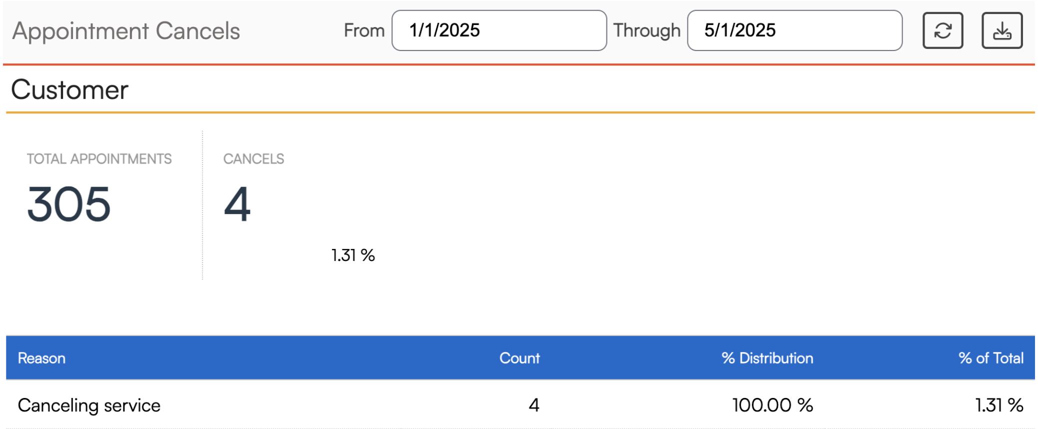
This report is essential for tracking the specifics of each appointment and ensuring all details are accurately recorded.

Appointment Cancels Report

The Appointment Cancels report provides insights into canceled appointments, helping you understand cancellation frequency and reasons.

This report shows:

- **Total Appointments**: Total scheduled in the timeframe
- **Cancels**: Number canceled
- **Cancellation Rate:** % of canceled appointments vs. total appointments
- **Reason for Cancellation:** Specific reasons given
- **Count**: Number of cancellations per reason
- **% Distribution:** Percentage of canceled appointments for each reason
- **% of Total:** Percentage of all appointments canceled
- **General %** of cancellations compared to total appointments in a timeframe



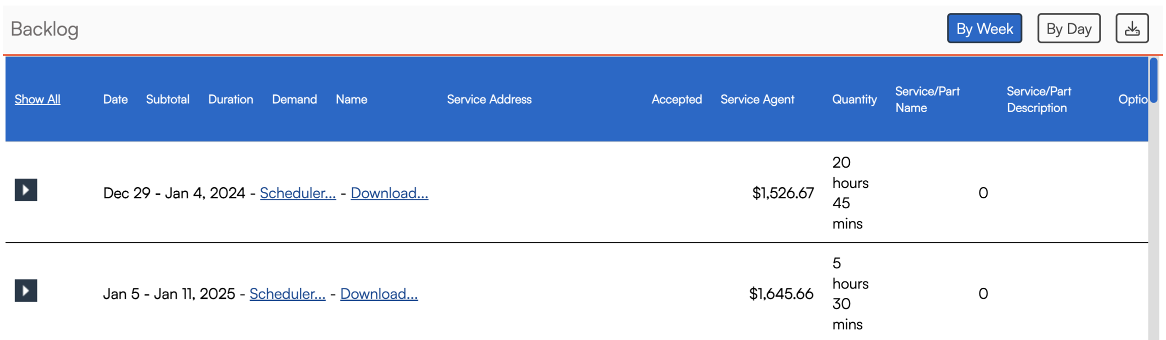
Backlog Report

The Backlog consists of all incomplete appointments, including any scheduled appointments that have not been finished or canceled. The dollar amount reflects the value of all appointments in the Backlog.

This report shows:

- List of incomplete appointments, grouped by day or by week
- Change grouping via buttons at the top of the grid
- Scheduled date, duration, and demand
- Contact name and service address
- Accepted date, subtotal, and services/parts
- Service agent details
- Totals of all subtotals and durations
- Links to schedule (via Scheduler/Route Builder) or download additional information
- CSV download of entire report or individual day/week appointments

Settings: To limit the time range, change the **Backlog Future Window** in **Control Panel > Scheduling**. Setting this to **0** will only display past appointments still needing completion or cancellation.



Reworks Report

The Reworks report tracks appointments requiring follow-up or corrections.

This report shows:

- A breakdown of reworks by service
- List of rework appointments

- Service agents and the services they performed
- Appointment count and duration
- Number of reworks and rework duration
- % of appointments requiring a rework

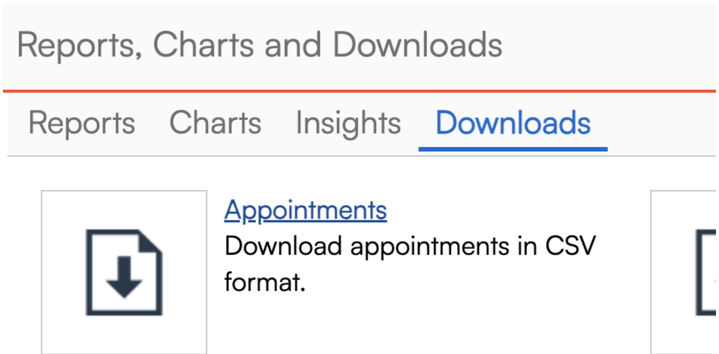
Services Summary Report

The Services Summary report provides an overview of appointment services.

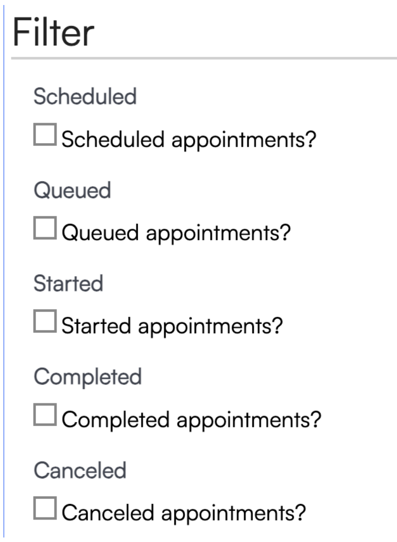
This report shows:
- Count of appointment services
- Average scheduled and actual durations
- Count of canceled appointments

Appointment Downloads

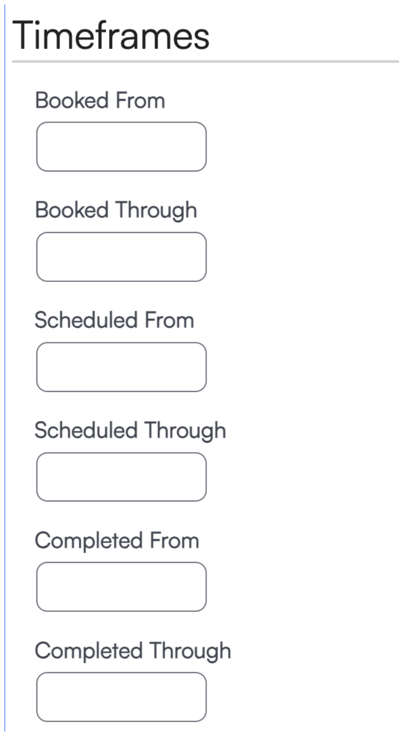
Appointments Download



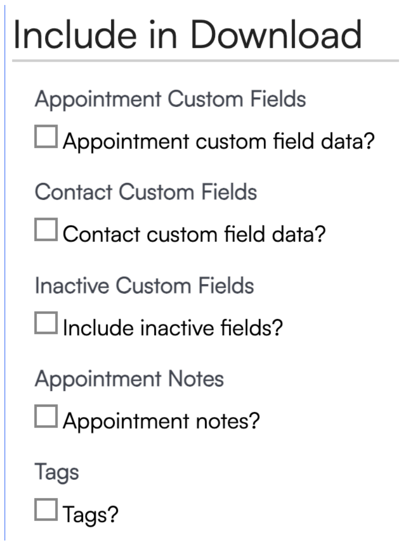
You can select which appointments you are downloading based on the following qualities:
- **Filters:** Select which **Status** of appointments you want to include in the download (scheduled, queued, started, completed, and/or canceled)



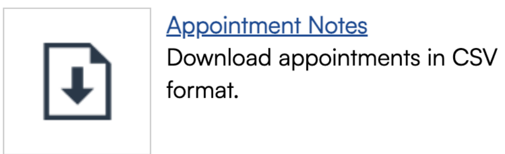
- **Timeframes:** Narrow down the downloaded appointments by the date which they were booked, scheduled, or completed.



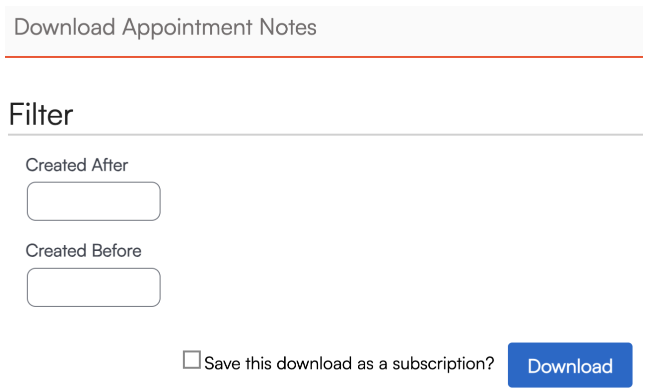
- **Include in Download:** Choose to include custom fields, notes, and/or tags in the download.



Appointment Notes Download



Download a CSV file of appointment notes. Filter by the date the notes were created.



FAQs

Q: How would I tell if completed appointments have been invoiced?

A: Pull Appointment Details report or download the completed ones, then see if they have an Invoice ID in the column called, "Invoice". If not, then it doesn't have an attached invoice.

To get that, go to Reports at the top, then click over to Downloads, select Appointments, then you can check the box for completed ones, put in a date range if you'd like, then download it when finished.

Q: The Revenue by Service Agent report doesn't have any values on it. This uses Appointment data to report on, so why is it blank?

A: This may be intended system behavior; it depends on the workflow of your industry/brand as it was set up in service**minder**. This report is most useful for a business that relies on the appointment being created, with the agent possibly adding parts or upselling the customer, and generating the invoice directly from that appointment to make a payment.

If there is no revenue associated with your appointment (such as your invoice is generated off a proposal accept or no appointments are ever scheduled off a proposal or invoice) then the revenue will never be recorded on the appointment - it will essentially skip this step and stay on the proposal or invoice. You can review more details about the different workflows for Service Settings: Invoicing Mode.

If you are looking for a similar report to Revenue by Service Agent and do not want to alter your workflow, then the best fit for your reporting needs is the Pipeline Report. It provides a view of lead activity, appointments booked, proposals created, and jobs scheduled, which may offer additional insight into agent performance.

Other reports present similar data:

- The Proposals segment of the End of Month Report provides close rate data for each user set as Owner of a proposal.
- The Sales Tracking Report presents count and value of proposals created, accepted and invoiced for that time period.
- The Proposal Summary report also provides revenue earned data by owner.