Appointment Reporting

07/23/2025 2:15 pm CDT

Overview

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

Appointment Reports

Go to **Reports > Reports** tab to find the following.

Appointment Summary

This report shows general appointment duration and number of appointments per day. You can also get some revenue and labor cost/ expenses from this report.

Date	Count	Sch Dur	Act Dur	Avg Sch Dur	Avg Act Dur	Gross
7/18/2024	1	30 mins	30 mins	30 mins	30 mins	$0.00
7/20/2024	1	30 mins	34 mins	30 mins	34 mins	$100.00
7/22/2024	1	1 hour	4 mins	1 hour	4 mins	$80.00
7/23/2024	3	2 hours 30 mins	3 mins	50 mins	1 mins	$120.00
7/24/2024	2	1 hour	40 mins	30 mins	20 mins	$455.00
7/25/2024	2	25 hours 30 mins	196 hours 29 mins	12 hours 45 mins	98 hours 14 mins	$815.00
7/26/2024	1	3 mins	0 mins	3 mins	0 mins	$250.00

Appointment Details

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.

Scheduled Clock	Actual Clock	Actual Start	Actual Finish	Man	Subtotal	Tax	Total	Discount	Invoice #	Balance	Payment	Method	Reference	Gross	Materials	Labor	Expenses	Costs	Margin
30 mins	30 mins	8:00 AM	8:30 AM	30 mins	$100.00	$0.00	$100.00	$0.00			$0.00			$0.00	$0.00	$0.00	$0.00	$0.00 / 0%	$100.00 / 100%
30 mins	30 mins	8:00 AM	8:30 AM	30 mins	$0.00	$0.00	$0.00	$0.00			$0.00			$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
30 mins	1 mins	8:28 AM	8:29 AM	5 mins	$0.00	$0.00	$0.00	$0.00			$0.00			$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
30 mins	30 mins	8:00 AM	8:30 AM	30 mins	$100.00	$0.00	$100.00	$0.00			$0.00			$0.00	$0.00	$0.00	$0.00	$0.00 / 0%	$100.00 / 100%
30 mins	30 mins	12:30 PM	1:00 PM	30 mins	$100.00	$0.00	$100.00	$0.00			$0.00			$0.00	$0.00	$0.00	$0.00	$0.00 / 0%	$100.00 / 100%
30 mins	42 mins	9:50 AM	10:32 AM	42 mins	$185.00	$0.00	$185.00	$0.00	137882	$0.00	$185.00	Cash	Pmt 2/2/2024	$185.00	$0.00	$0.00	$0.00	$0.00 / 0%	$185.00 / 100%
					$85.00	$0.00	$85.00	$0.00			$0.00			$0.00	$0.00	$0.00	$0.00	$0.00 / 0%	$85.00 / 100%

Appointment Cancels

This report pulls info around canceled appointments including % of cancellations in comparison to total appointments for a timeframe.

Backlog Report

The Backlog consists of all incomplete appointments. This includes any scheduled appointments that have not had the "Finish" button clicked or been cancelled. The dollar amount reflects the value of all appointments in the Backlog.

To limit the time range that the backlog displays, you can change the "Backlog Future Window" in Control Panel > Scheduling. If you set this value to 0, it will only display past appointments in the Backlog that still need to be completed or marked as cancelled.

Backlog											By Week	By Day	⬇
Show All	Date	Subtotal	Duration	Demand	Name	Service Address	Accepted	Service Agent	Quantity	Service/Part Name	Service/Part Description	Options	Notes
▶	Aug 25 – Aug 31, 2024 – Scheduler... – Download...							$600.00	32 mins	0			
▶	Sep 1 – Sep 7, 2024 – Scheduler... – Download...							$1,200.00	1 hour 30 mins	0			
▶	Sep 8 – Sep 14, 2024 – Scheduler... – Download...							$1,100.00	1 hour	0			
▶	Sep 15 – Sep 21, 2024 – Scheduler... – Download...							$1,100.00	1 hour	0			
▶	Sep 22 – Sep 28, 2024 – Scheduler... – Download...							$1,100.00	1 hour	0			
▶	Sep 29 – Oct 5, 2024 – Scheduler... – Download...							$1,200.00	1 hour 30 mins	0			
▶	Oct 6 – Oct 12, 2024 – Scheduler... – Download...							$1,100.00	1 hour	0			
▶	Oct 13 – Oct 19, 2024 – Scheduler... – Download...							$1,100.00	1 hour	0			
▶	Oct 20 – Oct 26, 2024 – Scheduler... – Download...							$1,100.00	1 hour	0			

The Backlog report displays a table containing a list of days or weeks, depending on the selection at the top, in which there are backlogged appointments. There is a button for downloading the entire report as a CSV at the top. You can go directly to the scheduler through the link next to each day/week. You can also download information about your backlogged appointments in CSV for each day/week. The totals of all subtotals and durations from the appointments are displayed to the right of each day/week.

Each day/week may be expanded to reveal the individual appointments whose information is mapped to the columns of tthe table.

Appointment Downloads

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

After clicking on the downloads, you have the option to download more specified information, such as:

Download Appointments

Filter

Scheduled	☐ Scheduled appointments?
Queued	☐ Queued appointments?
Started	☐ Started appointments?
Completed	☐ Completed appointments?
Canceled	☐ Canceled appointments?

Timeframes

Booked From	[ ]
Booked Through	[ ]
Scheduled From	[ ]
Scheduled Through	[ ]
Completed From	[ ]
Completed Through	[ ]

Include in Download

Appointment Custom Fields	☐ Appointment custom field data?
Contact Custom Fields	☐ Contact custom field data?
Inactive Custom Fields	☐ Include inactive fields?
Appointment Notes	☐ Appointment notes?
Tags	☐ Tags?

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.