Team and Payroll Reports

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Commissions Report

The **Commissions Report** provides a detailed breakdown of commissions earned by sales or service agents based on performance. It enables organizations to ensure timely and accurate payments while gaining visibility into revenue contribution by individual team members.

This report supports different views—including **Appointments**, **Invoices**, and **Proposals**—and offers filters for customizing the data by **Service Agent** and **Date Range**.

Key Metrics

The Commissions Report includes the following key metrics:

- **Agent Name:** The name of the sales or service agent.
- **Total Sales:** The total sales amount attributed to the agent.
- **Commission Rate:** The percentage or fixed amount used to calculate the commission.
- **Total Commission Earned:** The total commission amount earned by the agent.
- **Sales Period:** The period over which the sales and commissions are calculated

The actual commission is calculated based on the **commission rate** assigned to each agent and the **subtotal** of the associated appointment or invoice.

Report Navigation

The top navigation bar of the report includes:

- **Dropdown Filters**: Filter results by Service Agent and date.
- **Refresh Button**: Reload the report with updated data.
- **Download CSV**: Export the filtered report data in CSV format.
- **Mode Switch**: Toggle between Appointments, Invoices, and Proposals.
  - **Appointments Mode**
    - Shows **completed appointments** with start dates within the selected date range.
    - Breaks down each appointment to show the associated **parts** and individual **earnings** per assigned Service Agent.
  - **Invoices Mode**
    - Groups **completed invoices** by the **invoice owner**.
    - Only includes invoices with a value greater than $0.
    - Provides a **summary line** that totals the invoice values per owner.
  - **Proposals Mode**
    - Similar to Invoices Mode but uses the **proposal creation date** for filtering.
    - Includes a filter to view by **invoice owner**, ideal for sales performance analysis.

Mileage Report

The **Mileage Report** tracks the total distance traveled by Service Agents for appointments, helping organizations manage **travel expenses**, optimize **routing**, and calculate **mileage reimbursements** accurately. This report is especially useful for franchise owners and admins looking to monitor field efficiency and control operational costs.

Key Metrics

Each entry in the report includes the following data points:

- **Appointment Date:** The date on which the appointment took place.
- **Contact and Service Address:** Contact details associated with the appointment.
- **Average Mileage Wages**
- **Agent Labor:** Calculated from the Hourly Rate field on service agent settings.
- **Other Mileage Wages**
- **Other Labor**
- **Expenses by Part Category:** Cost of parts grouped by your custom categories (i.e., materials)
- **Costs:** Total of the costs for that job.
- **Subtotal:** Subtotal of the value being charged to the contact for the appointment.
- **Service:** Name of the service on the appointment
- **Service Agent(s):** Primary and additional agents scheduled on the appointment.
- **Scheduled Duration:** Duration on the calendar for the appointment.
- **Actual Duration:** Actual appointment duration from start to finish.
- **Drive Time:** Time spent driving.
- **Miles**: Miles driven.

Report Navigation

The Mileage Report features a collapsible view:

- Each **Service Agent** is shown with a **macro-level summary**.
  - Click to expand and view individual appointments with detailed travel data.
- **Map View**: Click the blue map icon to open a detailed route on an interactive map.
- **Filters**: Narrow your results by **Service Agent** or **Date Range**.

Service Agent Inventory Report

The **Service Agent Inventory Report** provides a comprehensive overview of the inventory items assigned to service agents. This report is essential for tracking the usage of parts and materials, managing stock levels, and ensuring that service agents have the necessary resources for their appointments. By utilizing this report, businesses can optimize inventory management and reduce the risk of stockouts or overstocking.

Key Metrics

The Service Agent Inventory Report includes the following key metrics:

- **Agent Name:** The name of the service agent to whom the inventory is assigned.
- **Part Name:** The name of the inventory part.
- **Part Description:** A brief description of the part.
- **Quantity On Hand:** The current quantity of the part available with the service agent.
- **Quantity Used:** The quantity of the part used by the service agent over a specified period.
- **Reorder Point:** The minimum quantity threshold at which a reorder should be triggered.
- **Date Range:** The period over which the inventory data is reported.

Report Navigation

The **Hours Report** features a collapsible view:

- Each **Service Agent** is shown with a **macro-level summary**.
  - Click to expand and view individualdates

- **Filters**: Narrow your results by **Service** or **Date Range**.

Hours Report

The **Hours Report** provides detailed information on the hours worked by service agents. This report is essential for tracking labor costs, managing payroll, and ensuring compliance with labor regulations.

Key Metrics:

- **Date**: The day of each clock-in and clock-out entry.
- **Appointment Start/End**: The scheduled start and end times for all appointments assigned to the agent that day.
- **Start/End**: The actual duration of time between the appointment(s) starting and ending.
- **Appointment Duration**: Total duration of all scheduled appointments for the day.
- **Clock-In/Clock-Out Time**: Time stamps for when the agent clocked in and out using the system.
- **Clocked**: Total time the agent was clocked in for the day.
- **Location**: If the agent used the mobile app with location services enabled, GPS coordinates (longitude and latitude) of the clock-in/out location will be displayed.

Hours Summary Report

The **Hours Summary Report** provides a summarized view of the total hours worked by service agents over a specified period. This report is crucial for high-level analysis of labor utilization, workforce management, and payroll processing. By leveraging this report, businesses can ensure efficient labor management and compliance with labor regulations.

Key Metrics

The Hours Summary Report includes the following key metrics:

- **Agent Name:** The name of the service agent.
- **Total Hours Worked:** The total number of hours worked by the service agent during the specified period.
- **Average Hours Per Day:** The average number of hours worked per day by the service agent.
- **Overtime Hours:** The total number of overtime hours worked by the service agent.
- **Date Range:** The period over which the hours data is reported.

Sales Team Tracking Report

The **Sales Team Tracking Report** monitors the activities and performance of the sales team. It provides insights into sales efforts, conversion rates, and overall effectiveness of the sales team.

Key Metrics:

- **User**
- **Date**
- **Contacts:** Number of contacts created by this user
- **Proposals:** Number of proposals created by this user
- **Value:** Total value of proposals that were created
- **Proposals Accepted:** Number of proposals created by this user that were accepted.

- **Accepted Revenue:** The value of the proposals that were accepted.
- **Invoices:** The number of invoices generated from those accepted proposals.
- **Invoiced Revenue:** The value of those generated invoices.

This report can be filtered by **Tags**.

Tips Report

The **Tips Report** tracks the tips received by service agents from customers. This report is useful for managing tip distribution, ensuring accurate reporting, and recognizing the efforts of service agents.

Key Metrics:

- Date: Date that tip was given.
- **Tip Amount:** Dollar value of tip.
- **Payment Method:** How tip payment was made.
- **Customer Name:** Hyperlinked to view the contact details page.
- **Appointment Date:** Date of service related to tip.
- **Service:** Service of appointment related to tip.
- **Service Agents:** Any agents who were scheduled on that appointment.
- **Service Agent Count:** How many agents were scheduled on that appointment.
