

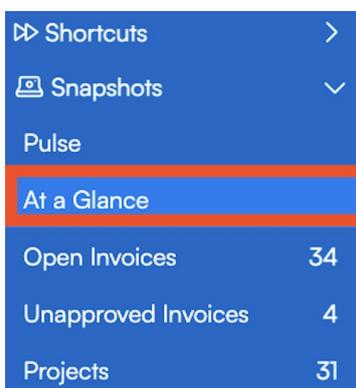
# At A Glance Report

05/08/2025 4:04 pm CDT

## Overview

The **At a Glance** report is a tool designed for business owners to quickly review daily activities and summaries within their organization. It provides a daily review of what is happening, including summaries and a quick overview of the day's activities. The report highlights the current day and offers the option to view the last 7 days of actions within the organization. This makes it a useful tool for owners to stay updated on the organization's status and recent activities.

The **At a Glance** report can be found in the **Snapshots** section of the navigation menu. To view the At a Glance report, you must have the **Reports** permission to be granted on your user profile.



The report is broken down into two sections: **Summary** and **Glances**.

## Summary

The summary section gives you a quick count of various activities that have happened in the system today.

- **Contacts:** All contacts added today.
- **Contact Notes:** All notes created on the contact level today.
- **Invoices:** All invoices created today.
- **Booked:** Appointments created in the system today.
- **Scheduled:** Appointments scheduled on the calendar for today.
- **First Available:** Appointments scheduled for today that have the "First Available" box checked on them, indicating the customer's preference for the soonest appointment possible.
- **Appointment Notes:** Notes created today on any appointments.
- **Proposals:** All proposals created today.
- **Unassigned Tasks:** All tasks in the system that are not assigned to a user.
- **Recent Pictures:** Pictures that were added to your organization in the past **7 days**.

Each of these metrics includes a **view** link that leads to a detailed grid for that category, except for recent pictures, which opens the Lightbox photo storage.

## Glances

The glances show detailed grids of each of the Summaries above, giving you further insights into each topic.

Scheduled Recent Today

Page 1 of 1 (3 items) Page size: 15

Action	When	Service Agent	Service	Contact	Address	Notes	Booked	Booked By
<a href="#">Cancel</a>	<a href="#">Thursday, May 8 at 8:00a</a>	Egon Spengler	Test Service	<a href="#">Stacey Fakename</a>	5678 Main Street   Austin, TX 78703		5/7/2025 10:26:48 AM	Katie H
<a href="#">Cancel</a>	<a href="#">Thursday, May 8 at 8:00a</a>	Ghostbusters Van	Test Service	<a href="#">Fred Rogers</a>	4802 E 5th St.   Austin, TX 78702		5/7/2025 10:28:48 AM	Katie H
<a href="#">Cancel</a>	<a href="#">Thursday, May 8 at 8:00a</a>	Peter Venkman	Test Service	<a href="#">Fred Flintstone - Slate Rock and Gravel Company</a>	1234 mainstreet   Austin, TX 78617		5/7/2025 10:29:18 AM	Katie H

You can jump directly to them by clicking the hyperlinked number or the **View** link next to each total.

SCHEDULED

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[View](#)

At the top of each grid, you will see the option to switch between **Today** and **Recent**. The grids default to show items from today's date, but can be toggled to display items from the past 7 days instead.

RecentToday



The Recent Pictures summary functions in a slightly different way. Instead of taking you to the Glances section, clicking on the number of pictures or clicking [View](#) will take you [Lightbox](#).

Lightbox

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05/08/2025



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03/12/2025







## FAQs

### How can I access the At a Glance report?

You can access the At a Glance report from the Snapshots menu on the left side of the screen. Simply select "At a Glance" to view the report.

### Who can view the At a Glance report?

Viewing permissions for the At a Glance report depend on your role and permissions within the organization.

Check with your organization admin to ensure you have the necessary permissions to view this report.

### **Can I see historical data in the At a Glance report?**

The Glances section of the At a Glance report allows you to view recent activities, including a summary of the last 7 days.

### **How often is the data in the At a Glance report updated?**

The data in the At a Glance report is updated in real-time, providing the most current information available about your organization's activities.

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