Brand Level Reports and Downloads

02/07/2025 4:51 pm CST

Overview

Brand-level Reports and Downloads can be found within the Dashboard. They each have their own tab at the top of the page. Reports can be viewed and worked with directly in service**minder** before downloading, whereas Downloads have a few minor settings you can configure before downloading as a CSV to work with in a separate program.

This article will review:
- Brand Level Reports
- Brand Level Downloads
- Download Subscriptions

Brand Level Reports

Report Name	Purpose
Appointment Category Summary	Appointments summarized by organization, status, and revenue category.
Backlog by Organization	Current backlog of appointments and accepted proposals by organization and associated services.
Backlog by Postal Codes	Current appointment and proposal backlog by select postal codes.
Contact Category Summary	Contact counts by location and category (i.e., customer, prospect, etc).
Contact Counts	Contact counts by location and month.
Donation Parts	Donation part summaries for each organization.
End of Month	End of Month reports for all organizations.
Part Usage	Summarizes part usage from invoices and related appointments, by service agent for all locations.
Payments by Accounting Class	Payments summarized by location and accounting class.
Pictures Summary	Total number of pictures by organization. Click on the organization, then the pictures tab to view individual pictures.
Postal Code Conflicts	Show contacts in organizations with postal codes that are owned by other organizations.
Proposal Close Rates	Proposal close rates by organization.
Proposal Summary	Proposal statistics by status per organization.
Revenue by Accounting Class	Revenue summarized by location and accounting class.
Revenue by Category	Revenue and invoice counts summarized by location and revenue category.
Revenue by Lead Source	Revenue summarized by Channel and Campaign for all locations.
Revenue by Organization	Revenue by organization, grouped by revenue category or service.
Revenue Pivot Grid	
Reworks	Rework performance for the brand.
Service Availability Report	Displays next available dates for active services.
Service Expiration	Number of contacts with active, expired, or no service at all.

Report Name	Purpose
Service/Part Category Revenue	Invoiced service/part category revenue and counts by organization.
Users/Logins	User details and login activity by organization
Utilization Report	Login and appointment volume activity in the past 30 days for each organization.

Brand Level Downloads

Brand downloads offer a set of configurations before downloading. Download results are retained in our system for 24 hours.

Download	Description	Configurable Options
Contacts	Download contact details for all organizations.	Filter • Created Date • Updated Date • Invoiced After Date • Contacts With or Without Emails • Only national account related contacts • Tags Include in Download • Contact Custom Fields • Organization Custom Fields • GeoZones • GeoShapes • Excluded Orgs
Contact Notes	Download contact notes for all organizations.	• Created After date • Created Through date

Download	Description	Configurable Options
Invoices	Download invoice details by organization. This includes contact details (contact information, Channel/Campaign, Category, etc)and overview information about each invoice (service, total, balance due, tax, etc).	**Statuses** • Open • Paid • Voided • Unapproved **Timeframes** • Invoice Date • Created Date • Updated Date **Include** • Include Lines • Include Excluded Orgs
Invoice Lines	Download a list of individual line items used on each invoice, grouped by organization.	**Statuses** • Open • Paid • Voided • Unapproved **Timeframes** • Invoice Date • Created Date • Updated Date **Include** • Include Excluded Orgs
Appointments	Download appointments for all organizations	**Types** • Scheduled • Queued • Started • Completed • Canceled **Timeframes** • Scheduled Date • Completed Date • Created Date • Updated Date **Include in Download** • Appointment Custom fields • Organization Custom Fields • Excluded Orgs

Download	Description	Configurable Options
Payments	Download payment history for all organizations	**Timeframes** • Payment Date • Created Date **Include** • Excluded Orgs
Proposals	Download proposals for all organizations	**Filter** • Proposal Date • Created Date • Updated Date • Printed Date • Accepted Date • Completed Date • Status **Include** • Proposal Tags • Bundled Proposals • Lines • Custom fields • Organization Custom Fields • GeoZones • GeoShapes • Solutions • Excluded Orgs
Parts	Download details about Parts for each organization.	None.
Recurring Billing	Download active recurring billing plans for all organizations	None.
Services	Download details about Services for each organization.	None.
Feedback	Download a list of feedback issues for all organizations.	**Filter** • Feedback After Date • Feedback Before Date **Include in Download** • Excluded Orgs

Download Subscriptions

Once you are ready to initiate the download, you can also check the box to save those settings as a **Download Subscription** and choose if you want to receive it weekly or monthly. Downloads generated by Report Subscriptions are retained for 7 days.

☑ Save this download as a subscription?

Frequency

✓ Weekly
Monthly

Download