Resource Usage Reports

10/28/2025 8:52 am CDT

Asset Inventory Report

The **Asset Inventory** report allows you to view current counts of parts that are marked as **Assets**. It provides detailed information about each part, including part ID, part name, and the total number of assets listed for that part. This report is crucial for tracking the availability and usage of assets, ensuring that you have the necessary items on hand and can plan for future needs effectively.

This report includes:
- **Part ID:** Unique identifier for each part.
- **Part Name:** Name of the part.
- **Total Number of Assets:** Total count of assets listed for the part.
- **Checked Out:** Number of assets currently checked out.
- **On Hand:** Number of assets available on hand.
- **Scheduled to be Checked Out:** Number of assets scheduled to be checked out.

Donation Parts Report

The **Donation Parts** report displays donation transactions within a selected date range. This report helps in tracking donations for tax purposes and understanding the financial impact of donation parts on your organization.

This report includes:
- **Date:** Date of the donation transaction.
- **Contact:** Contact information associated with the donation.
- **Invoice Number:** Invoice number linked to the donation.
- **Part Name:** Name of the donation part.
- **Quantity:** Quantity of the donation part used.
- **Subtotal Value:** Subtotal value of the donation part(s).

Part Usage Report

The **Part Usage** report summarizes the quantity of parts used from invoices and related appointments. It can be filtered to group information by service agent, part, contact, owner, or organization (only useful in the brand version of this report), providing flexibility in tracking part consumption.

This report is essential for managing inventory levels, allowing you to gather part usage trends and compare it to your quantity on hand so you can prepare for future appointments.

This report includes:
- **Part Name:** Name of the part.
- **Part Description:** Description of the part.
- **Quantity Used:** Quantity of the part consumed during jobs.
- **Lines:** How many individual lines the part was listed on.
- **Unit Cost:** The cost to your business for a single unit of the part..
- **Extended Cost:** The total cost of all units used, based on the unit cost.

- **Revenue:** The total amount charged to the customer for that part.
- **Quantity On Hand:** Quantity of the part currently available.
- **Target Quantity On Hand:** Target quantity that should be available.

Project Assets Report

The **Project Assets** report details the assets associated with appointments, including their statuses, parts, owners, and financial metrics. This report provides a comprehensive view of the assets tied to projects, helping you manage resources and financials effectively.

This report includes:
- **Proposal ID and Title**: Identifiers for the proposal.
- **Proposal Date and Status**: Information about when the proposal was created and its current status.
- **Contact ID and Name**: Details about the contact associated with the asset.
- **Part Name and Quantity**: Information about the part name and the quantity added to the proposal.
- **Checked Out Date and Expected Return Date**: Dates indicating when the asset was checked out and when it is expected to be returned.

Resource Planning Report

The **Resource Planning** report allows you to view necessary part resources for your backlog, which includes any appointments that have been scheduled but not yet completed. This report helps in planning and ordering the necessary parts for upcoming appointments, ensuring that you are prepared and can avoid delays due to part shortages.

Metrics:
- **Date of Range ofAppointments:** Grouped by week or by month.
- **Part Name:** Name of the part required for appointments in that date range.
- **Quantity Needed:** Quantity of the part needed for the appointment.
- **Quantity On Hand:** Quantity of the part currently available.
- **Delta:** Difference between the quantity needed and the quantity on hand.