

Appointment Reports

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Appointment Cancels Report

The **Appointment Cancels** report provides detailed insights into the number of appointments that have been canceled within a specified timeframe. This report helps you understand the frequency and reasons for cancellations, enabling you to identify patterns and take corrective actions to reduce future cancellations.

This report includes:

- **Total Appointments:** The total number of appointments scheduled within the selected timeframe.
 - **Cancels:** The number of appointments that were canceled.
 - **Cancellation Rate:** The percentage of canceled appointments relative to the total number of appointments.
 - **Reason for Cancellation:** The specific reasons provided for each cancellation.
 - **Count:** How many appointments were canceled with that reason.
 - **% Distribution:** What percentage of canceled appointments were for that reason.
 - **% of Total:** What percentage of *all* appointments were canceled for that reason.
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Appointment Details Report

The **Appointment Details** report provides comprehensive information about each appointment, including customer and service agent data, clock-in times, man hours, payments, margins, and appointment notes. This report is essential for tracking the specifics of each appointment and ensuring all details are accurately recorded.

This report includes:

- Customer and service agent data
 - Duration and start/finish times
 - Labor hours and labor costs
 - Payments and margins
 - Appointment notes and attached proposals
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Appointment Summary Report

The **Appointment Summary** report provides an overview of all appointments within a specified date range. It summarizes key metrics such as the number of appointments, scheduled vs. actual duration, tax, gross profit, and expenses.

This report includes:

- Total number of appointments per day
 - Scheduled vs. actual duration
 - Gross profit and expenses
 - Tax and adjusted subtotal
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Backlog Report

The **Backlog** report lists all incomplete appointments, including those that have not been marked as finished or

canceled. This report helps you track outstanding tasks and manage your workflow effectively.

This report includes:

- List of incomplete appointments, grouped by day or by week
 - Change how the appointments are grouped via the buttons at the top of the grid
 - Scheduled date, duration, and demand
 - Contact name and service address
 - Accepted date, subtotal, and services/parts
 - Service agent details
 - Links to schedule or download additional information
 - Click the Scheduler link to view the Route Builder
 - Click Download to get a CSV file of these appointments
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Reworks Report

The **Reworks** report tracks appointments that require follow-up or corrections. This report is crucial for identifying areas where service improvements are needed and managing rework costs.

This report includes:

- A breakdown of reworks by service
 - A list of rework appointments including
 - Service agents and the services they performed
 - Appointment count and duration
 - Number of Reworks and the rework duration
 - Percentage of appointments requiring a rework
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Services Summary

The **Services Summary** report provides an overview of appointment services, including counts, average scheduled and actual durations, and financial metrics. This report helps you evaluate service performance and identify trends.

This report includes:

- Count of appointment services
 - Average scheduled and actual durations
 - Count of canceled appointments
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