



Production Reports

The Best of the Best

Production Reports: The Best of the Best



Thom Boersma

Customer Success Manager, RealGreen

Agenda

- Summary Reports
- Scheduling Reports
- History Reports
- Production Reports
- Time Reports
- Other Reports

SA5 Reports: Summary Reports

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Summary Reports provide overall looks at the whole business. The summary reports will generally provide totals in lieu of detailed information for each customer record.

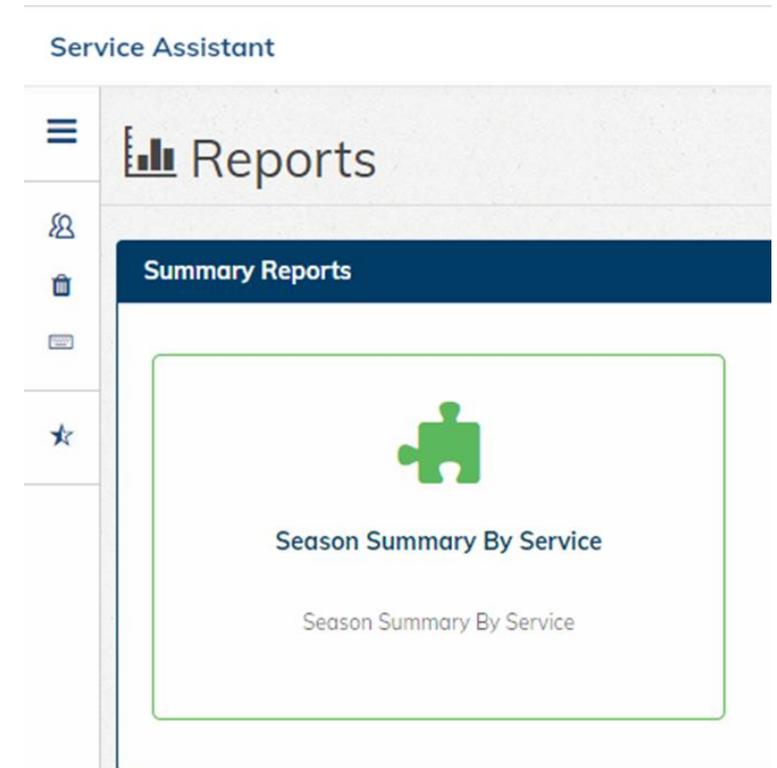
- Season Summary by Service
- Season Summary by Round/Cycle
- Product Usage Season Summary
- Route Performance
- Man Hour Budgeting

SA5 Reports: Summary Reports

The Season Summary by Service can be found under Reports > Summary Reports > Season Summary by Service.

This report will look at originally scheduled work, completed work, pending work, skipped work, and projected work for the upcoming year based on renewal settings.

This report is specific each service code.

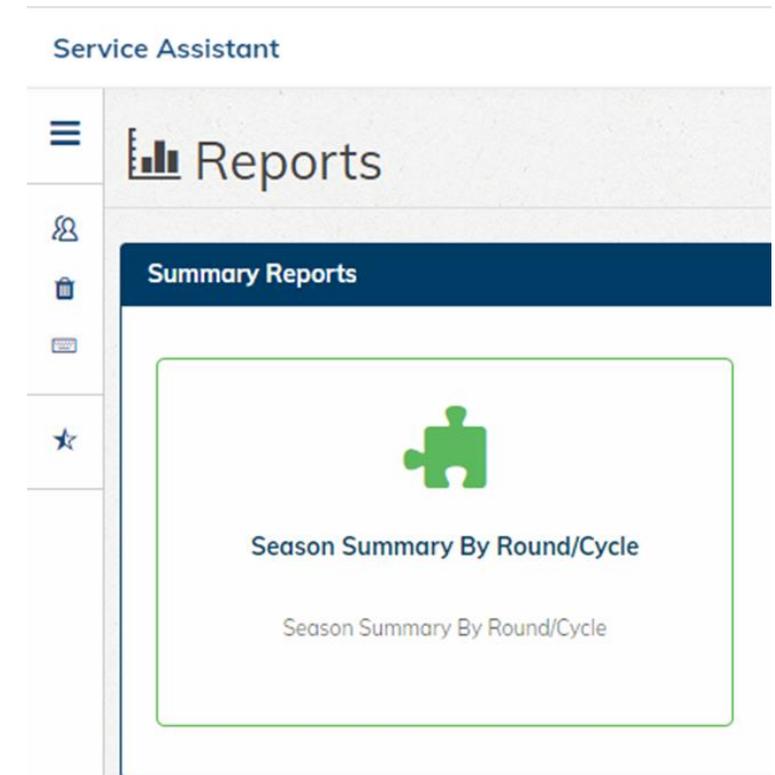


SA5 Reports: Summary Reports

The Season Summary by Round/Cycle can be found under Reports > Summary Reports > Season Summary by Round/Cycle.

This report will look at originally scheduled work, completed work, pending work, skipped work, and projected work for the upcoming year based on renewal settings.

This report is specific to the round number(s).

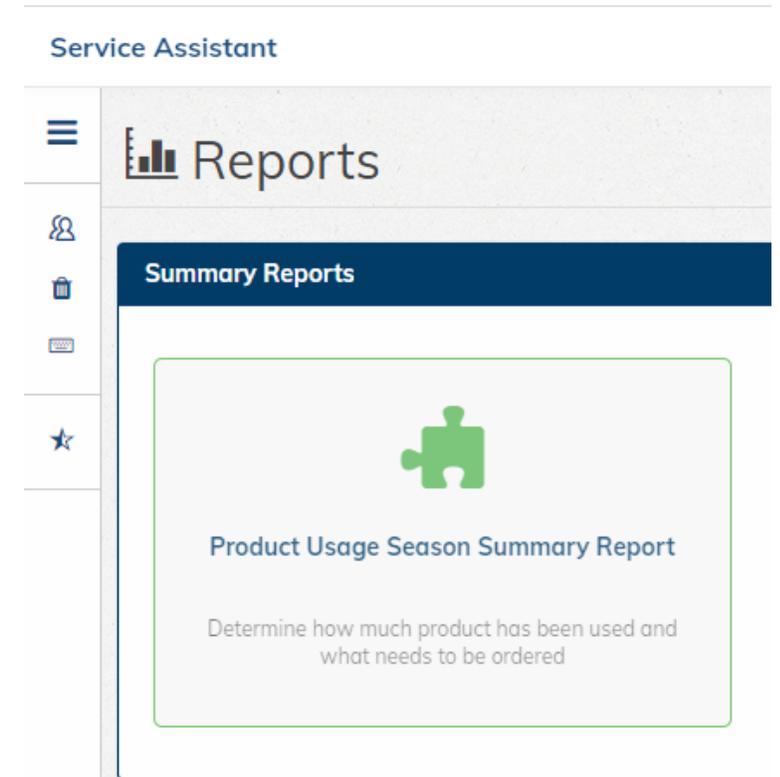


SA5 Reports: Summary Reports

The Product Usage Season Summary can be found under Reports > Summary Reports > Product Usage Season Summary Report.

This report will look at original estimated usage, actual usage, treated size, remaining size, and projected product amount needed to finish the season (requires rate of application in Service Setup).

Can be categorized by product category.

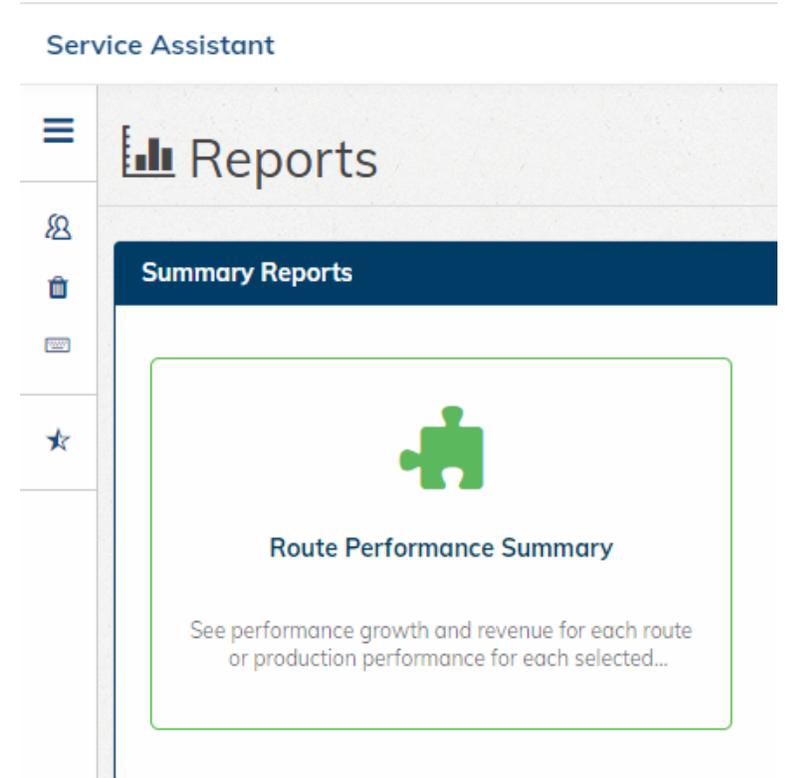


SA5 Reports: Summary Reports

The Route Performance Summary can be found under Reports > Summary Reports > Route Performance Summary.

This report will look at beginning service counts, sales, growth, revenue and revenue completed, production days, average production, and service calls needed.

Can be viewed by technician or route. Output will differ between the two.

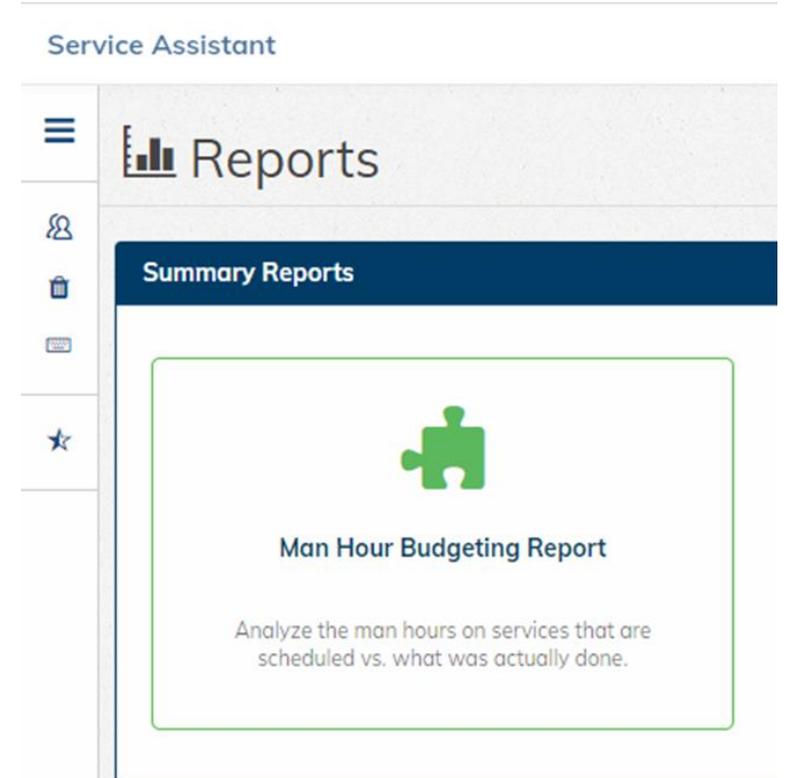


SA5 Reports: Summary Reports

The Man Hour Budgeting Report can be found under Reports > Summary Reports > Man Hour Budgeting Report.

This report will look at estimated man hours for each service code, total posted, total remaining, and actual total posted.

Hours will be broken down by service code, and by month within each service code.



SA5 Reports: Scheduling Reports

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Scheduling Reports provide information on incomplete work. Whether the work has been printed and assigned already, skipped, or is otherwise awaiting assignment, there will be a report to identify those services by customer and service code.

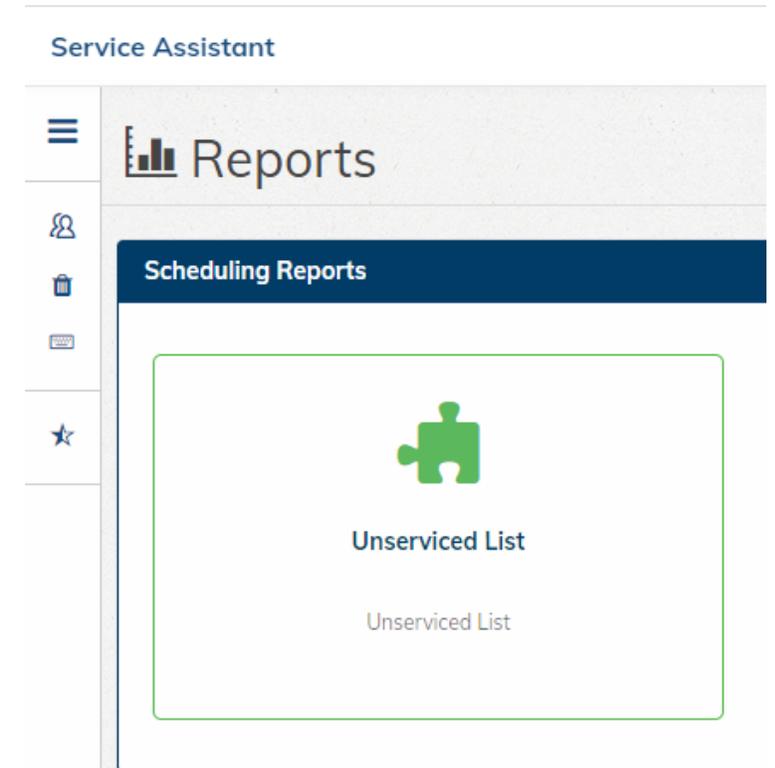
- Unserviced List
- Skipped Services
- Services on Hold
- Service Call Pending

SA5 Reports: Scheduling Reports

The Unserviced List can be found under Reports > Scheduling Reports > Unserviced List.

This report will look at incomplete work, i.e. work that needs to be scheduled or produced. Can be run by a variety of dates and service statuses.

This report will be one of the single most important reports for scheduling and making sure stops are being posted in a timely manner.

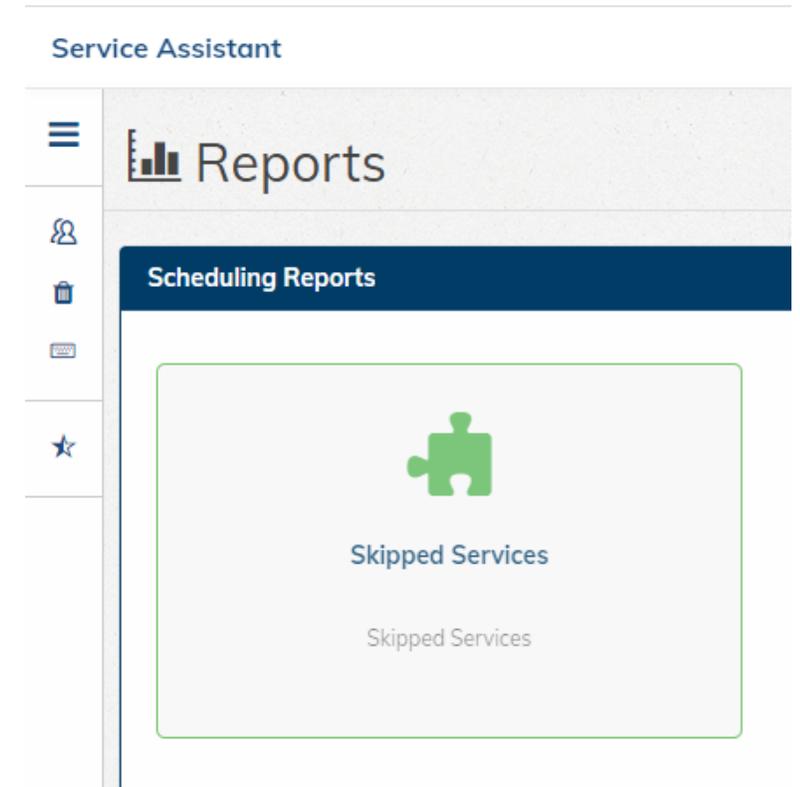


SA5 Reports: Scheduling Reports

The Skipped Services report can be found under Reports > Scheduling Reports > Skipped Services.

This report will look at skipped services by service code and skip code as needed. It will break down skips by route code and provide totals for each.

This report can currently only be run one round at a time but will eventually be expanded to run for all rounds.

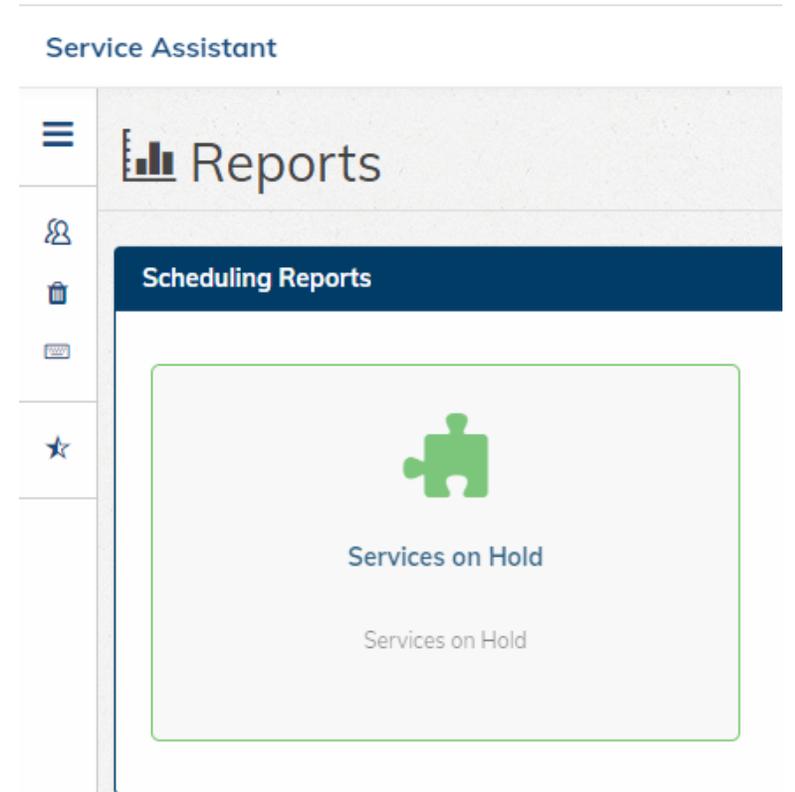


SA5 Reports: Scheduling Reports

The Services on Hold report can be found under Reports > Scheduling Reports > Services on Hold.

This report will look at services that fall under a temporary hold. These holds may be placed on the customer and affect all services or may be service specific.

Holds will only be valid for a user designated time frame and will not remove automatically from the customer or service record (they will no longer impact servicing after the hold end date).

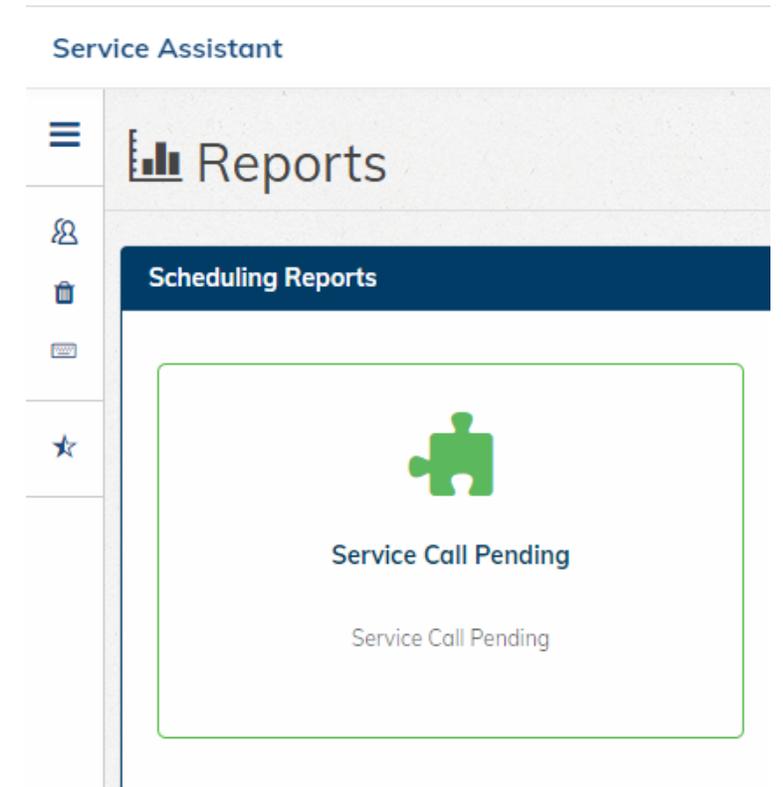


SA5 Reports: Scheduling Reports

The Service Call Pending report can be found under Reports > Scheduling Reports > Service Call Pending.

This report will look at service calls that have been added to customer accounts. It will track how old service calls are, and how long it took them to be printed from entry date.

Only includes and will report on services marked as Service Calls in the Service Setup.



SA5 Reports: History Reports

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History Reports provide additional information on completed work. They do not focus specifically on the production itself, but more so on the products applied, temperatures and wind speeds recorded, and other valuable information pertinent to the completed work.

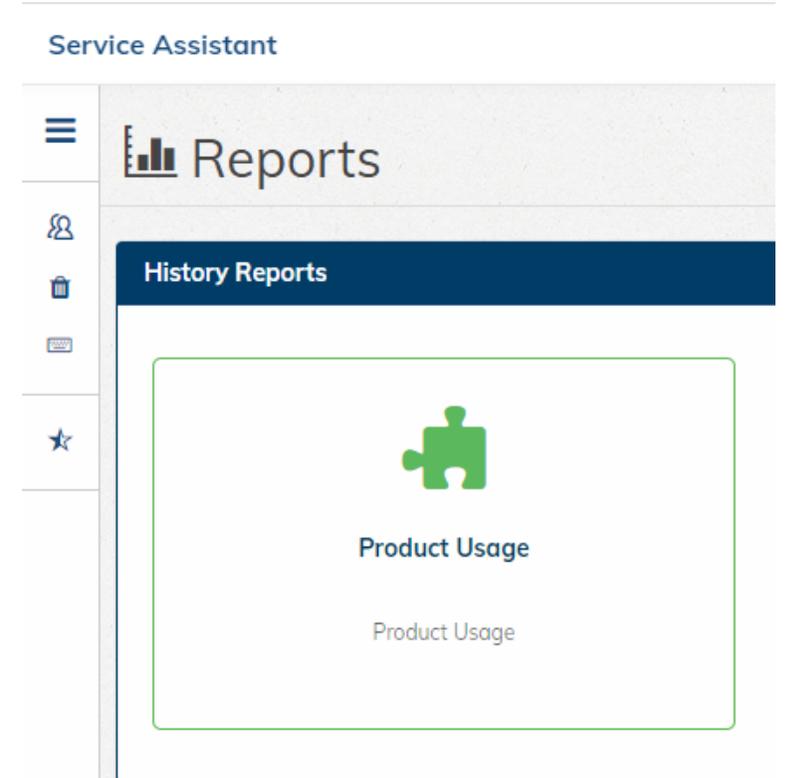
- Product Usage
- Commercial Applicator
- Service Summary
- Technician Routing Analysis

SA5 Reports: History Reports

The Product Usage report can be found under Reports > History Reports > Product Usage.

This report will look at individual products and the amount used during a specified date range. It will include EPA#, target, property size, amount applied, and the treated area (if different than the property size)

This report can be sorted by technician but will not feature individual service address details.

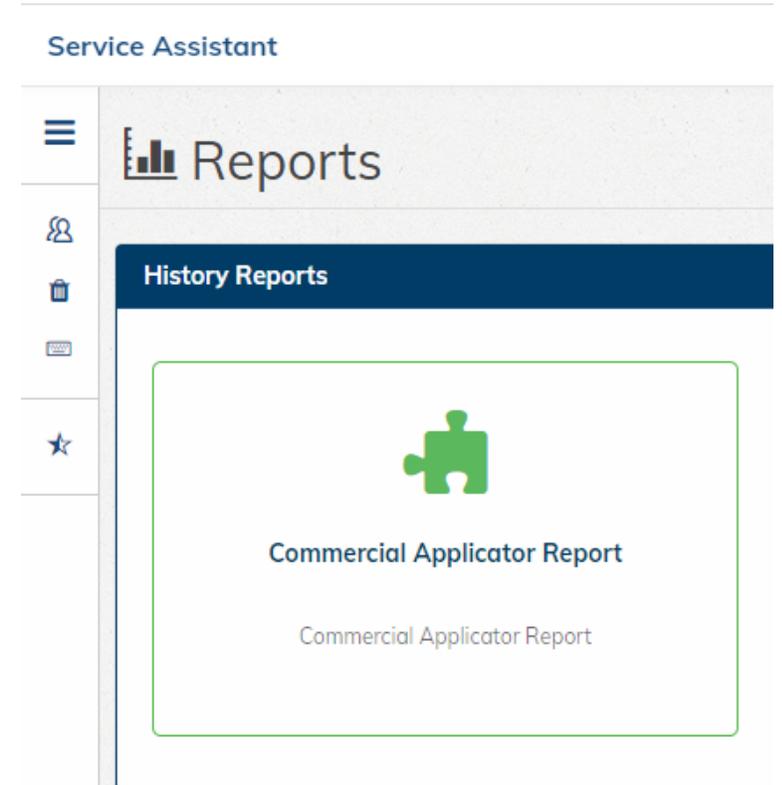


SA5 Reports: History Reports

The Commercial Applicator Report can be found under Reports > History Reports > Commercial Applicator Report.

This report is dependent on the output type, but can include property information, wind speed and direction, EPA#, rate, application method, county information, and applicator details with license information.

In general, this is a report that will be used for Dept. of Agriculture reporting.

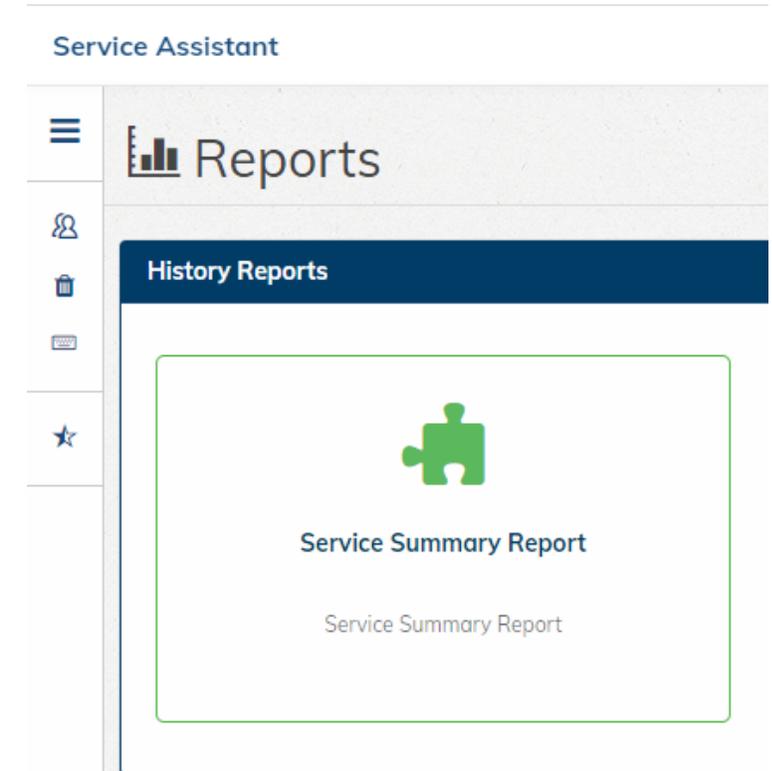


SA5 Reports: History Reports

The Service Summary Report can be found under Reports > History Reports > Service Summary Report.

It is a summary of each application: product(s) used, location(s) treated, targets, rate of application, method of application, wind speeds, and feedback left by the technician.

This report can also be printed or emailed customer by customer, and application by application from History.

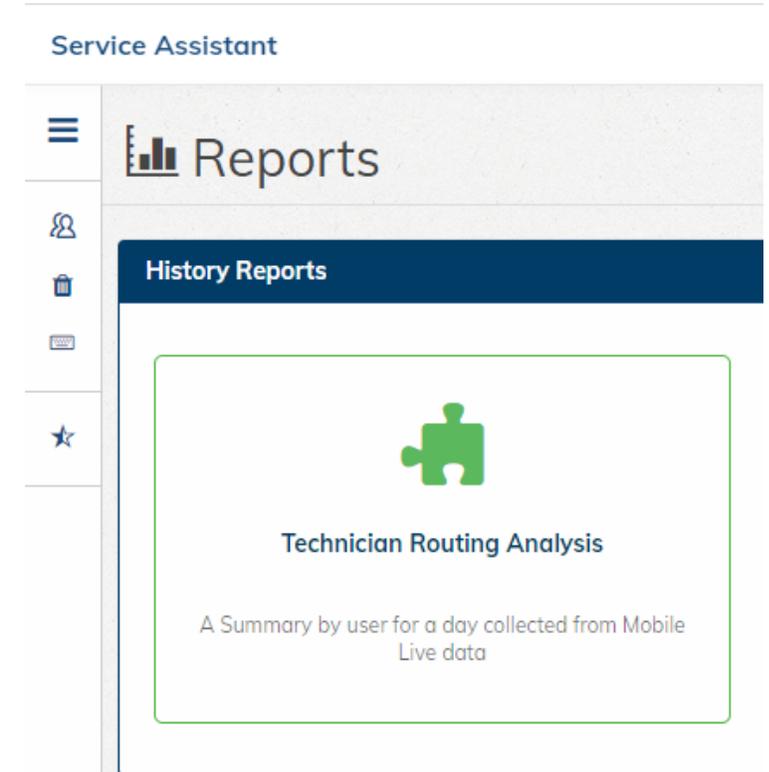


SA5 Reports: History Reports

The Technician Routing Analysis can be found under Reports > History Reports > Technician Routing Analysis.

This report will show revenue per hours worked or hours driven and can be ordered by original route optimization or actual stop completion order.

This report requires information provided from Mobile Live to generate results.



SA5 Reports: Production Reports

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Production Reports provide information on completed work. Generally, these will focus on the tech(s) that completed the work, the service(s) completed, and the location that the work was done. These will almost always focus on the service completed but can include additional information.

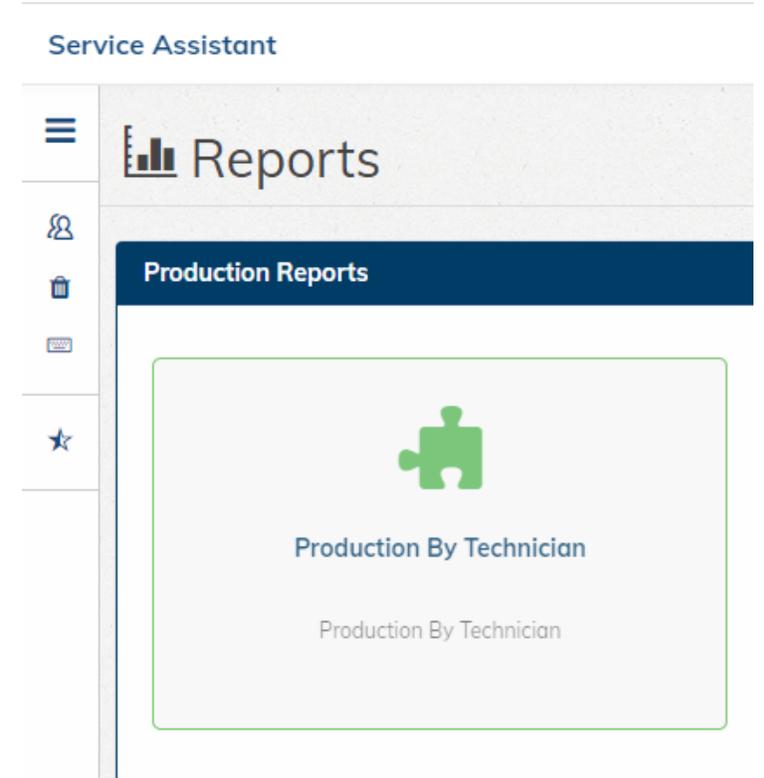
- Production by Technician
- Daily Production
- Weekly Productivity
- Production by Condition Code

SA5 Reports: Production Reports

The Production by Technician report can be found under Reports > Production Reports > Production by Technician.

This report will show production totals sorted by tech and will include original sales totals, totals after discount, production value, and hours spent.

This report can be run by program code or service code depending on the needs.

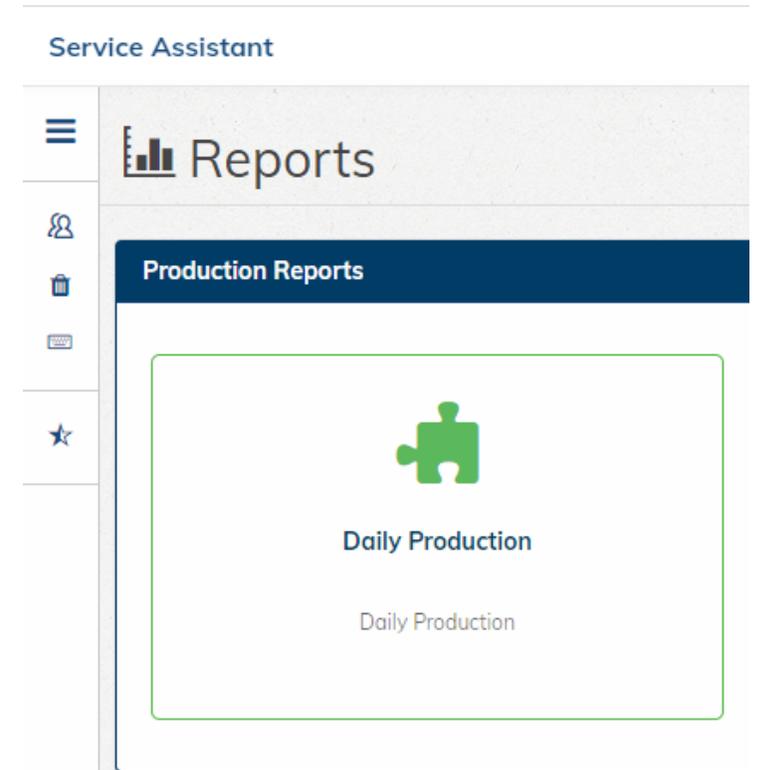


SA5 Reports: Production Reports

The Daily Production report can be found under Reports > Production Reports > Daily Production.

This report will show information for a single date and tech(s). It will show stop-by-stop details: time in and out, weather information, conditions spotted, and products used.

This report will include work in a production journal that has not been posted yet.

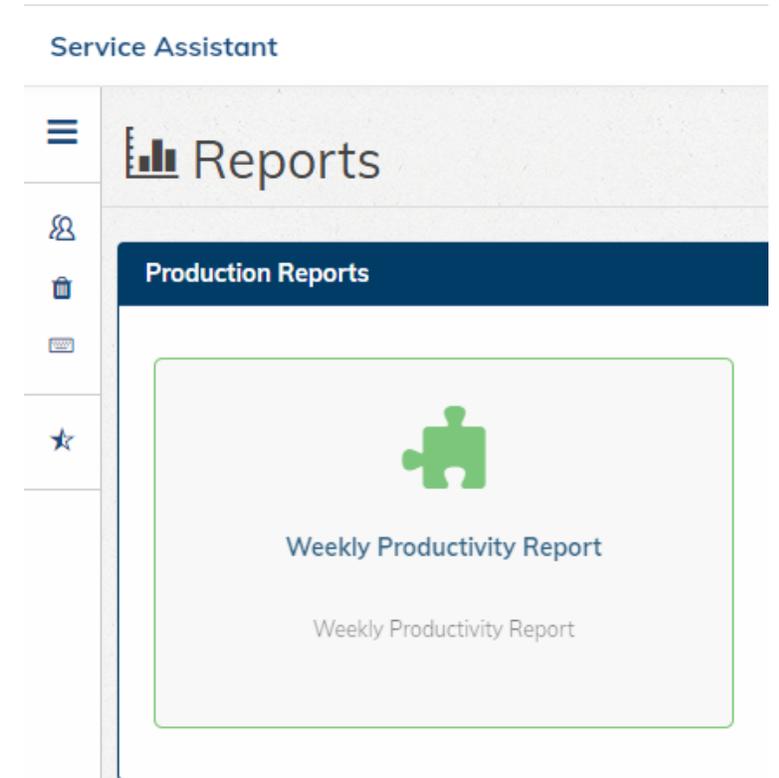


SA5 Reports: Production Reports

The Weekly Productivity Report can be found under Reports > Production Reports > Weekly Productivity Report.

This report will show program production totals, special production totals, service call production, leads entered and completed, and sales totals.

There are a variety of outputs on this report to summarize by route, tech, service, etc.

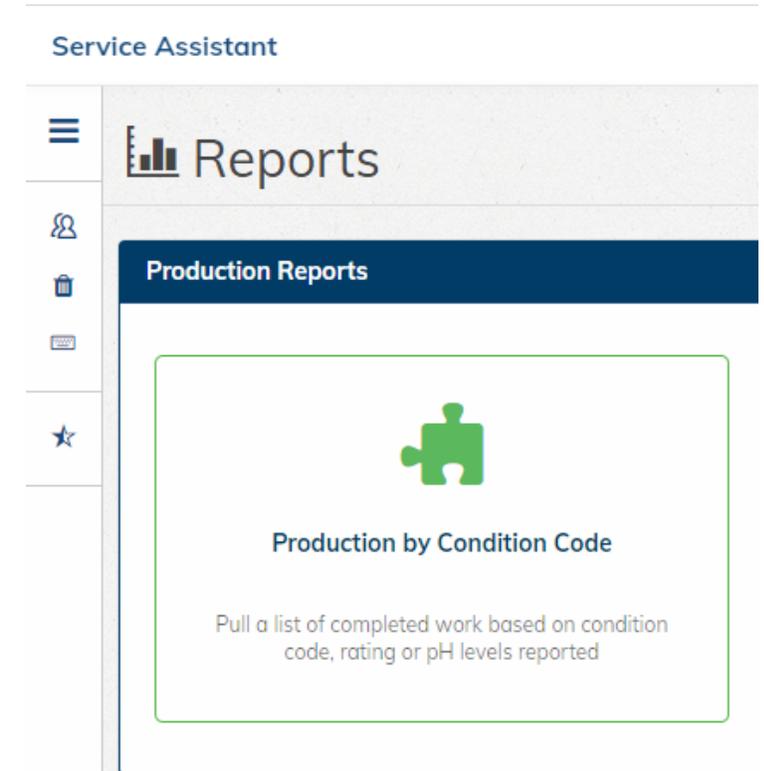


SA5 Reports: Production Reports

The Production by Condition Code can be found under Reports > Production Reports > Production by Condition Code.

This report will look at services completed, and the conditions spotted during that application. It can also search for specific pH ranges noted during production or lawn rating ranges.

This report is important to both the production side, but also important for marketing and upsell purposes.



SA5 Reports: Time Reports

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Time Reports provide information specific to the time spent on completed work. Generally, they can provide important information regarding average hours spent per service, or at a specific property as needed. They can also be used for work order type jobs to evaluate profitability for each job done.

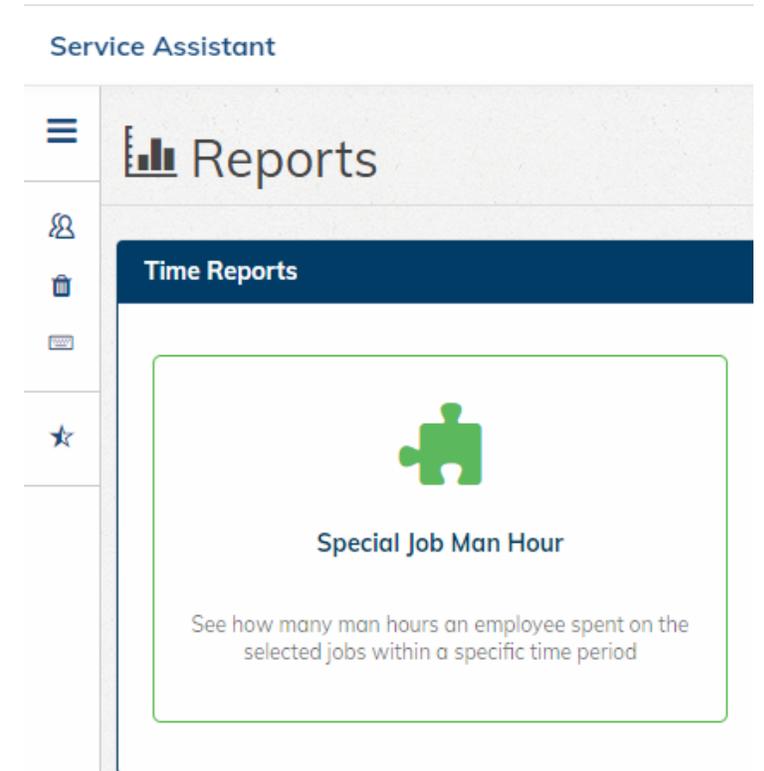
- Special Job Man Hour
- Job Costing
- Average Man Hour Analysis

SA5 Reports: Time Reports

The Special Job Man Hour report can be found under Reports > Time Reports > Special Job Man Hour.

This report is an employee focused look at how long they are spending on each job. It will include original estimated man hours and actual man hours for each service completed.

This report works best if estimated man hours AND actual man hours are being recorded.

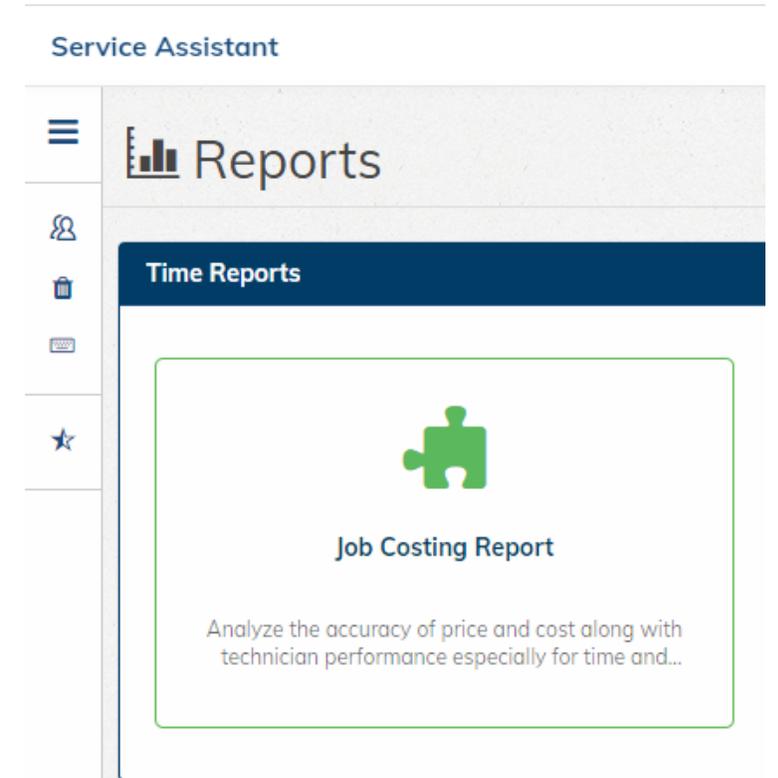


SA5 Reports: Time Reports

The Job Costing Report can be found under Reports > Time Reports > Job Costing Report.

This report looks primarily at the profitability of work order/time and material jobs based on the originally estimated quantities and actual quantities required to complete the work.

It is recommended that both estimated quantity AND actual quantity for time and materials are recorded.

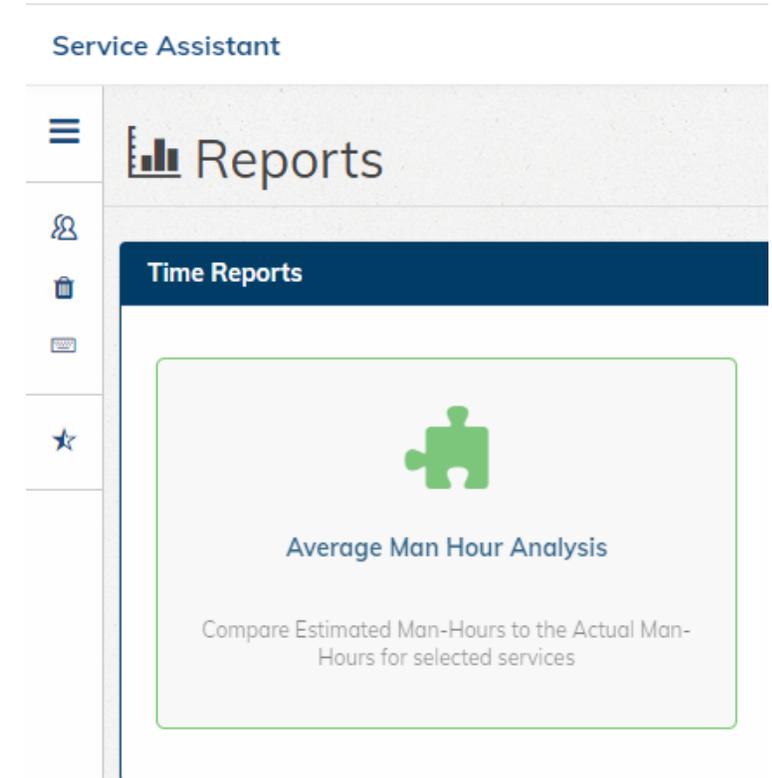


SA5 Reports: Time Reports

The Average Man Hour Analysis report can be found under Reports > Time Reports > Average Man Hour Analysis.

This report is a customer or route focused look at how long techs are spending on each property. It will include original estimated man hours and actual man hours for each service.

This report works best if estimated man hours AND actual man hours are being recorded.



SA5 Reports: Other Reports

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Other Reports are generally uncategorized reports or reports specific to a utility or function within Service Assistant. Within this grouping there is an additional production report geared towards assigned and completed work. It can also act as a sign off sheet for the technicians to validate the work completed on that date.

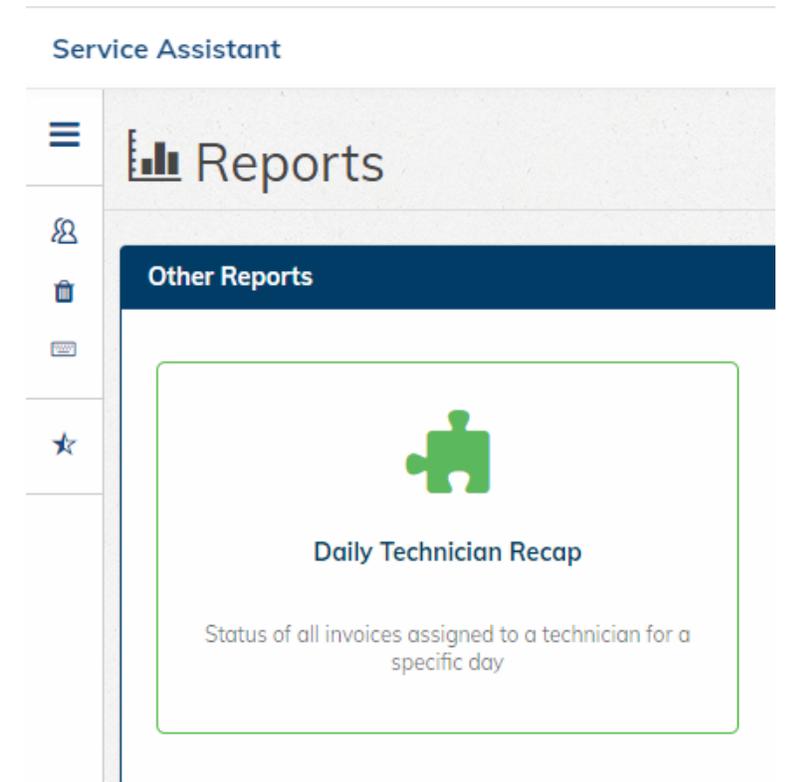
- Daily Technician Recap
- Route Management Dashboard

SA5 Reports: Other Reports

The Daily Technician Recap can be found under Reports > Other Reports > Daily Technician Recap.

This report looks at the overall status and completion of invoices assigned to a tech for a specific day: # assigned, # skipped, # canceled, # completed, products used, and time spent.

This is meant to be printed at the end of the day and can be used as a sign off if needed.



SA5 Reports: Other Reports

The Route Management Dashboard can be found under Tech Tracking > Route Management Dashboard.

This report is a live time production dashboard that shows assigned and completed work by branch, date, and selected technician(s)

Incomplete work can be reassigned directly from the Dashboard, and you can launch Live Truck Tracking based on the selections made.

Service Assistant > Tech Tracking > Route Management Dashboard

Route Management Dashboard Show All Details

Branch: All Branches Selected Date: 08/20/2022 Employee: All Employees Selected Refresh

Records marked with bold text indicate the present location of the employee

<input type="checkbox"/>	Employee ID - Name	Scheduled \$	Completed \$	Total Size	Total Estimated Ma...	Total Actual Man H...	Total Variance
<input type="checkbox"/>	ASB - Andy Bathgate	10,053.00	0.00	2,239.6100	116.06	00:00	00:00

Send To Live Truck Tracking Reassign

Totals For Day

Customers	Services	Scheduled \$	Completed \$	Size	Estimated Man Ho...	Actual Man Hours	Variance
167	167	10,053.00	0.00	2,239.6100	116.06	00:00	00:00

Session Feedback

- Login to the Event Mobile App
- Add this session to your schedule
- Click Survey
- Give it a rating 1-5 stars

Questions?

**Sign up on 2/4
and receive 20%
off your ticket!**

 **BEYOND SERVICE**
CUSTOMER CONFERENCE '27

**SEE YOU IN
NEW ORLEANS!**

Sunday, January 31, through
Wednesday, February 3, 2027

Hilton New Orleans Riverside

