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SA5 Report Basics

Boot camp – Standard Reports for
Scheduling, Production, and
Financials

SA5 Estimate to Proposal



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Agenda

Report Basics



Report selections

Filters Filters Filters



Flagcodes

Mail Merge



A Day in the Life





Report Basics

So many reports which one!!

Spring Restored

Reports

Home Reports

- Sales Report
- Production By Salesperson
- Customer Growth Analysis
- Sales Commission
- New Sales Production Efficiency

License Reports

- Customer Control Report
- Programs Control Report

Customer Reports

- Customer List
- Customer List by Program/Job
- Customer List by Program/Status/Job
- Customer/Program Status Comparison
- Marketing Summary
- Duplicate Address Report
- Customer List by District Report
- Group Billing Report
- Customer Status Report
- Installation Customer Fault Report
- Customer Status
- Customer List by Distinct Date
- Customer Pay Report
- Service Order Report
- Multiple High/Lowest Marketing
- Customer Status Report
- Customer Action Sheet
- Customer Status
- Property Inventory Report

Report Basics

Every report will look at different information, which is to say it all depends on what information is needed. Also keep in mind that every report has different filters which could change what your looking at.

You can not really compare one report to another since they all dont report the exact same information.

The screenshot displays a 'Customer List Report' interface with the following filters and options:

- Branch:** AC - Acme CO.
- Route:** 45 of 45 Routes Selected
- Zip Codes:** 116 of 116 Zip Codes Selected
- Program/Job Billing Type:** Select All / Deselect All
- Property Inventory:** 31006, 31010, 31015, 31058, 31709, 31711, 31712, 31735
- Customer Status:** 31010, 31015, 31058, 31709, 31711, 31712, 31735
- Year:** 31058, 31709, 31711, 31712, 31735
- Customer Number:** 31711, 31712, 31735
- Size:** 31712, 31735
- Group By:** Ignore
- Include Customers Without Services
- Summary Only
- Territory Code:** 4 of 4 Territory Codes
- Source Code:** 84 of 84 Sources Selected
- Bill To:** All Customers
- Tax Code:** 5 of 5 Tax Codes Selected
- Customer Type:** Both
- Since Date / Marketing Import Date:** All
- Map Code:** ZZ-ZZ-ZZZ
- Carrier Route:** ZZZZ
- Sub Group By:** Ignore
- Sort By:** Customer Number

More filters

- Flag Codes
- Advanced Options
- Send To Mapping Filter
- Filter By List
- Simple Customer List

Report Basics

If you see “Earliest to date” we recommend changing that to “ALL”. Earliest to date will only look for information with a date, if it does not have a date it will be excluded.

Done Date: Paid Date:

Sold Date: Renewal Date:

You can use the calendar to select dates between or use the selections on the left. You can also type in the top box to narrow the results of options.

Done Date: Paid Date:

Sold Date:

Customer Type:

Main Group By:

Calendar: JANUARY 2025

SUN	MON	TUE	WED	THU	FRI	SAT	SUN	MON	TUE	WED	THU	FRI	SAT
29	30	31	1	2	3	4	29	30	31	1	2	3	4
5	6	7	8	9	10	11	5	6	7	8	9	10	11
12	13	14	15	16	17	18	12	13	14	15	16	17	18
19	20	21	22	23	24	25	19	20	21	22	23	24	25
26	27	28	29	30	31	1	26	27	28	29	30	31	1
2	3	4	5	6	7	8	2	3	4	5	6	7	8

Report Basics

Some Reports may have different selections and will change the report criteria itself.

The screenshot shows a web interface for configuring a report titled "Production By Technician". The interface includes several input fields and a dropdown menu:

- Branch:** A dropdown menu showing "12 of 13 Branches Selected" with a close icon (X) and a downward arrow.
- Program/Job OR Service:** A dropdown menu currently set to "Service Production by Technician".
- Programs & Special Jobs:** A section with a mouse cursor hovering over it, containing a search bar and a list of options: "Program / Job Production by Technician" and "Service Production by Technician".
- Available Services:** A section with a table header that includes "All Services" and "Selected Services".

This would look at either a whole program or specific services.

Report Basics

In more filters you can use flag codes or in Advanced Option use filters there to narrow down information further. You can also Send to Mapping, Filter by Lis, or produce a simple customer list.

More filters

+ Flag Codes

- Advanced Options

Customer Information	▼	Preferences	▼
Documents	▼	Size Source	▼
Letters	▼	Subdivision	▼
Letters (Master Documents)	▼	NPS	▼
Decile	▼		

Send To Mapping Filter

Filter By List

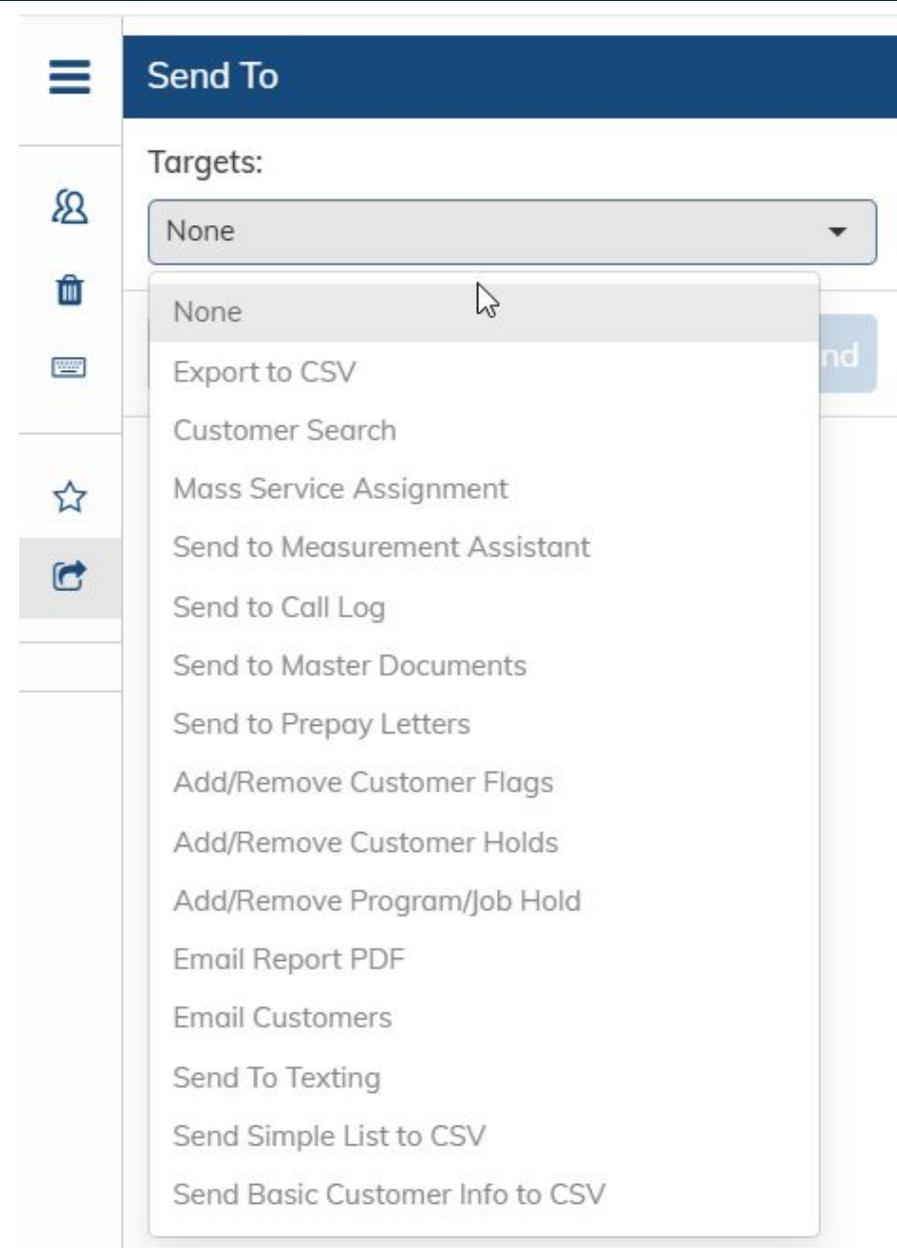
Simple Customer List

Report Basics

Need to export data to a Utility or maybe mass add/remove flagcodes?

Reports also sometimes have more data than the paper can hold, have you tried exporting to CSV?

A CSV is a file Excel or Google sheets will recognise the data your looking for may be there.



Report Basics

Flagcodes are very powerful, they mean nothing to the software but everything to you.



If one report doesn't have all this information needed try creating and adding a flagcode to those customers then run another report creating and adding another flag code to those customers. Though it takes time this is a great way to break down customers by reports.

- Create and add a flagcode to a subset of customers.
- Run a subsequent report to add another flagcode, segmenting customers effectively.

Report Basics

Default reports not cutting it?
Have you tried Mail Merge?

Mail Merge was designed for the idea of printing letters but is a powerful way to run a custom report.



Mail Merge

Extract data from your database by selecting what records and what information about those records you...

> Reports > Mail Merge



1

Step 1
Select Fields

2

Step 2
Review Results

3

Step 3
Output Fields

4

Step 4
Price & Upsells

5

Step 5
Review / Process

Report Basics

Mail Merge will have 3 basic selections Customer, Prog/Job, Service. With in those 3 is numerous selections to narrow down what you're looking for.

Field Type: Customer ▼

- Customer
- Program/Job
- Service

Customer Field List
Search
Address line 2
Balance 1 - 30 Days
Balance 121 - 160 Days
Balance 161 - 180 Days
Balance 31 - 60 Days
Balance 61 - 90 Days
Balance 91 - 120 Days
Balance Over 180 Days
Bank Routing & Transit #
Bill To Account
Billing Address
Billing Address Line 2
Billing City
Billing Company Name

Report Basics

The basic computer logic sets the order. Selecting all or deselecting all will not make a selection. In example looking for all 5-9 status customers with a net balance that is set to Autopay, and the program is active for the year 2024

Customer Field List

Search

Pre-air

Prepay Balance

Property Inventory

Property Size (Customer)

Reference #

Remit/Credit Balance

Route (Customer)

Service Address

Source Code (Customer)

State

Statement Type

Status (Customer)

Street Address

Street Name

Details

- Description
- No Status
- Request Estimate
- Gave Estimate
- Gave Estimate-Send Email
- Gave Estimate-Not Sold
- Cancelled-Do Not Call
- Cancelled-Call Next Year
- Cancelled-Customer Moved
- Pending Approval
- Active

Reset Changes
+ Add

Group	Type	Criteria	
1	Customer	Status (Customer) (Cancelled-Call Next Year, Cancelled-Customer Moved, Pending Approval, Active)	
1	Customer	and Net Balance is between 1 and 99999999.99	
2	Program/Job	and Billing Type (Program) (Credit Card)	
2	Program/Job	and Status (Program) (Active)	
2	Program/Job	and Service Year includes (2024)	

Common Reports



Scheduling Reports

- Unserviced List
- Skipped Services
- Services on Hold
- Season Summary

Production Reports

- Production By Technician
- Daily Production
- Weekly Productivity Report

Setup Reports



Financial Reports



- Aging Report
- Credit Balance Report
- Credit Hold Report
- Detailed Aging Report
- General Ledger
- Payment Report
- Sales Tax Report
- Payment Reconciliation (WWP Only)



Sales Reports



- Sales Report
- Sales Commission
- Production By Sales Person
- New Sale Production Efficiency (NEW)
- Customer Cancel
- Prog/Job Cancel
- Estimate Summary

SA5 Reports

A Day in the Life

The daily routine in a nutshell.

- Contact with potential customer. (phone, webform, referral, email, out on the street)



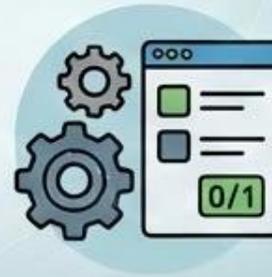
1. Contact with potential customer (phone, webform, referral, email, out on the street).



2. Enter basic information, set customer status at 0 or 1.



3. Get measurement out in person or online.



4. Add program/jobs in status 0 or 1.



5. Produce estimate: physical paper or online (evaluate property, assess needs).

A Day in the Life cont.



Customer Status & Proposal

- Put customer in status 2 or 3
- Send proposal (Master Doc, Prepay Letter, AMA, Forms)

Customer Decision

- ✓ If customer accepts move to 8 or 9
 - If accepts pull up customer to be done (generate work to be done)
- ✗ If customer declines move to status 4
 - If declines follow up to try to get them to come to your company



Service & Payment

- Do work
- Post work as done
- If they did not Prepay then collect payment (AutoPay, Installments, Check, Cash, Customer pays on CAW)

Questions?