Session Feedback

We appreciate your feedback and attendance

- Login to the event mobile app
- Add this session to your schedule
- Click survey
- Give it a rating 1-5 stars

SA5 Report Basics

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

BEYOND SERVICE
CUSTOMER CONFERENCE '26

SA5 Estimate to Proposal

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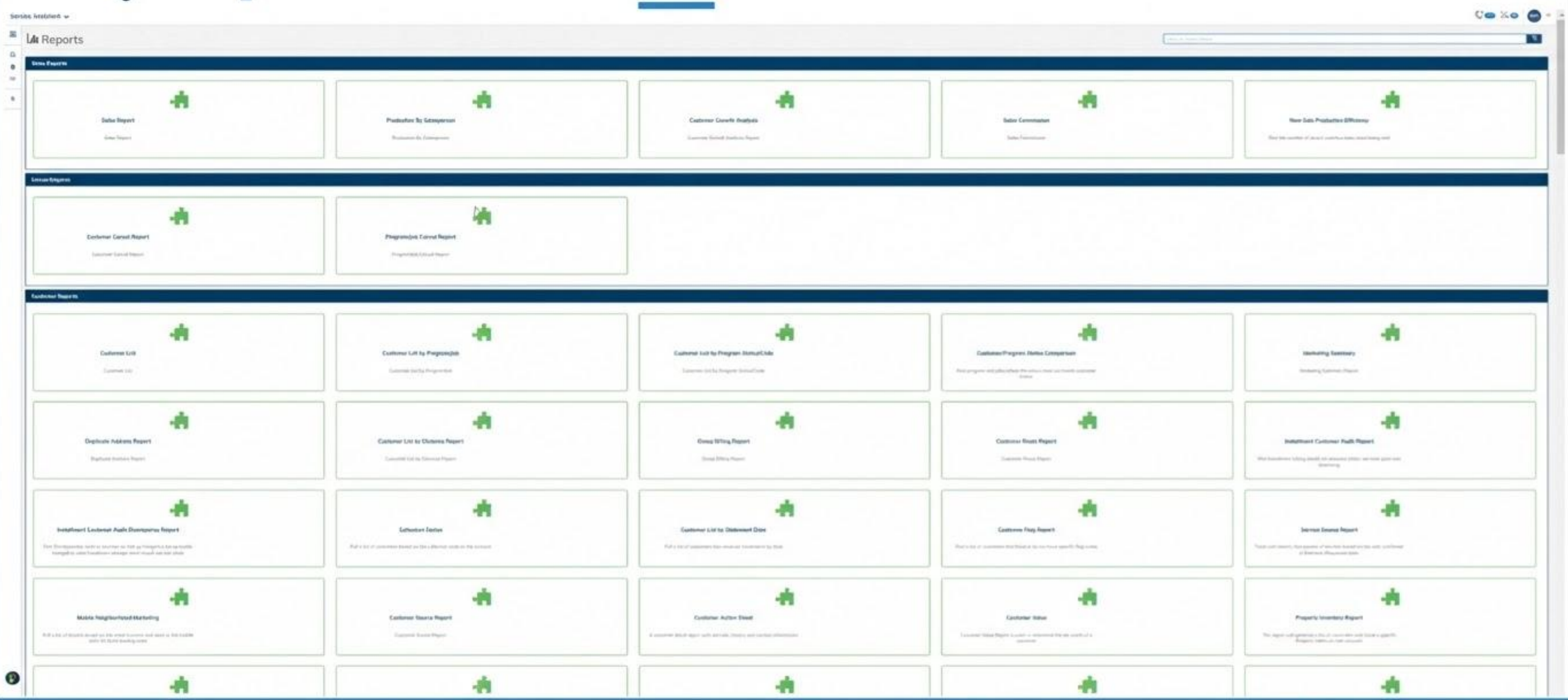
Agenda

- Report Basics
- Report selections
- Filters Filters Filters
- Flagcodes
- Mail Merge
- A Day in the Life

Report Basics

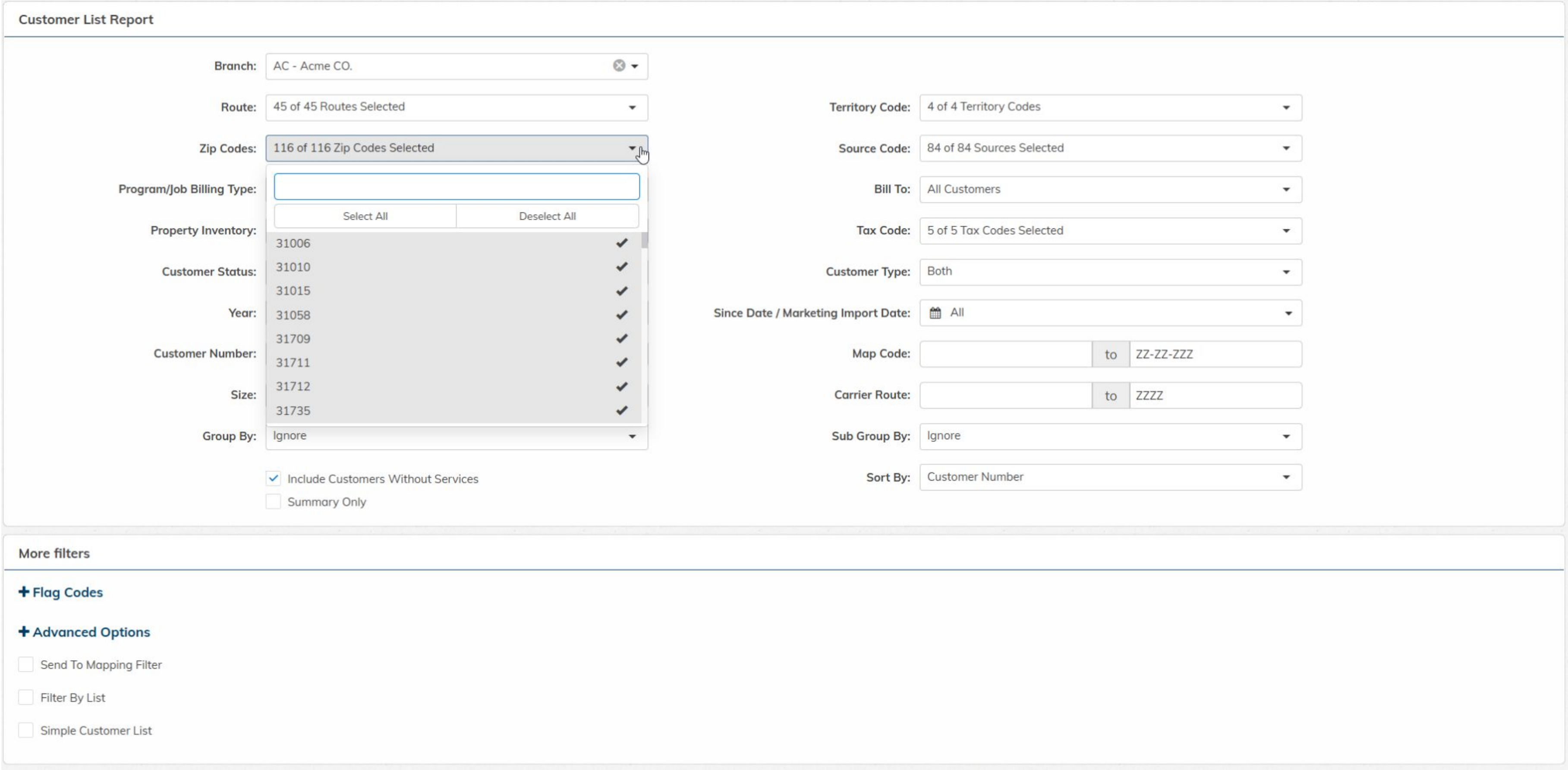
So many reports which one!!



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.

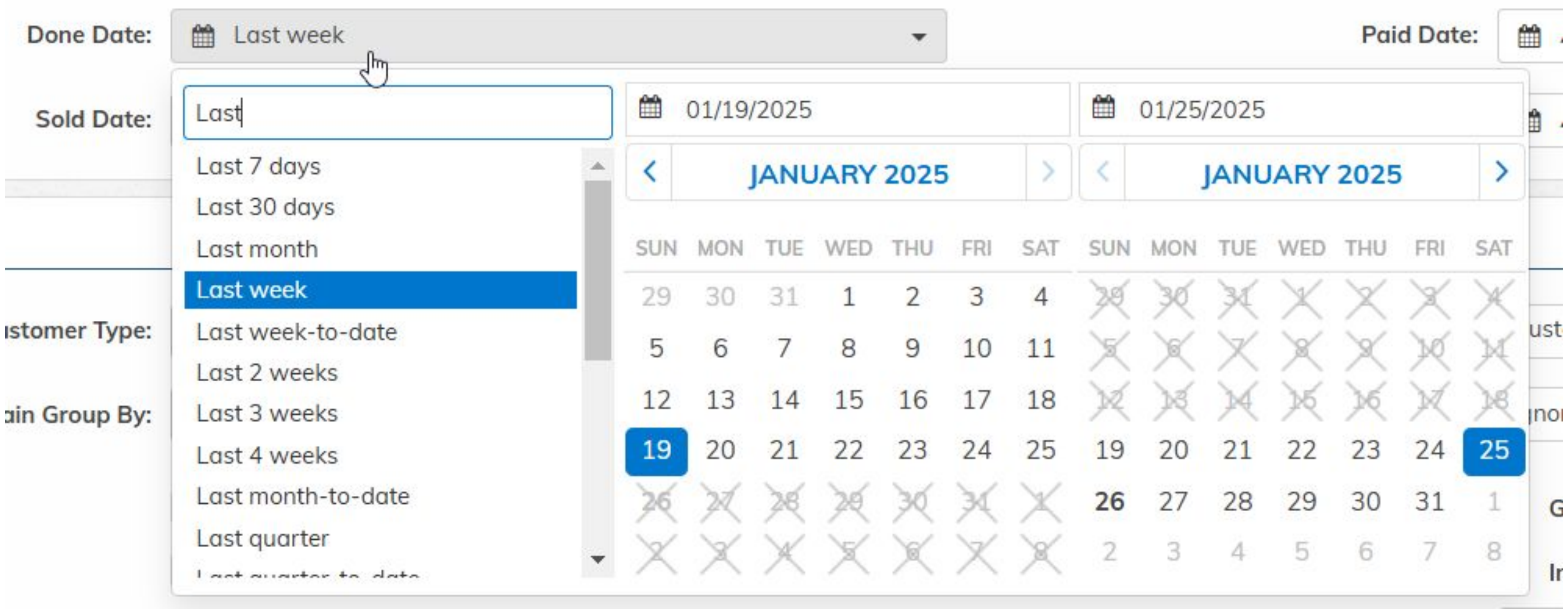
You can not really compare one report to another since they all dont report the exact same information.



Report Basics

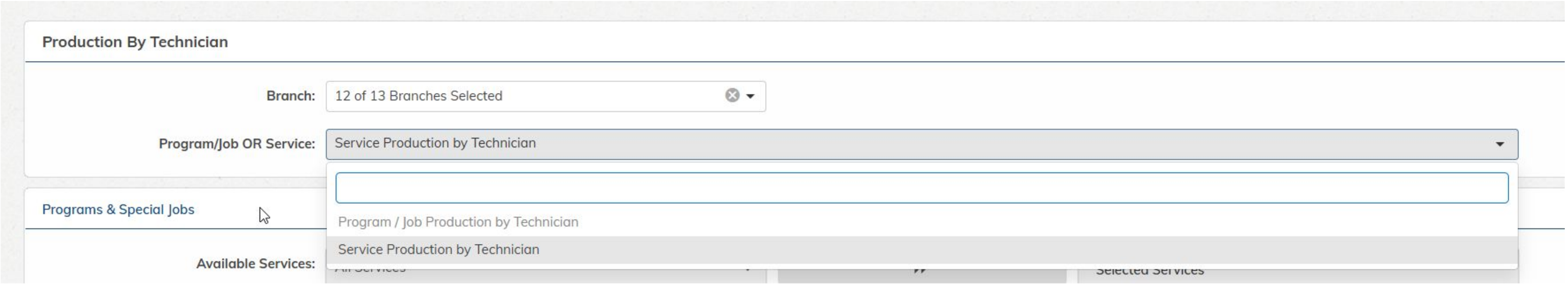
If you see “Earliest to date” we recommend changing that to “ALL”. Earliest to date will only look for information with a date, if it does not have a date it will be excluded.

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.



Report Basics

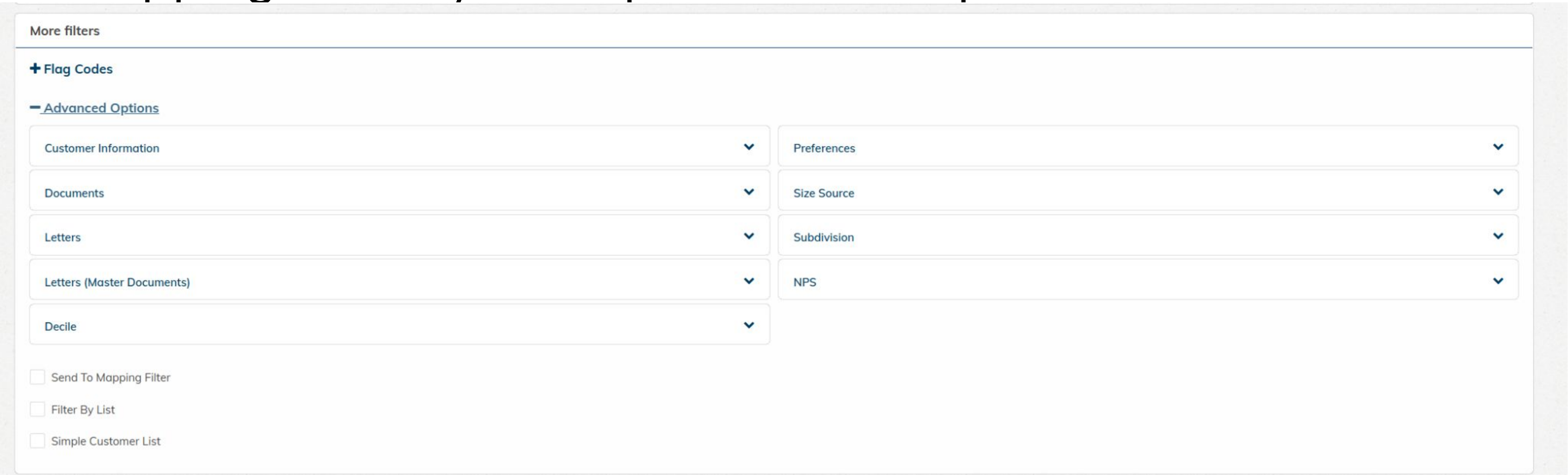
Some Reports may have different selections and will change the report criteria itself.



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.

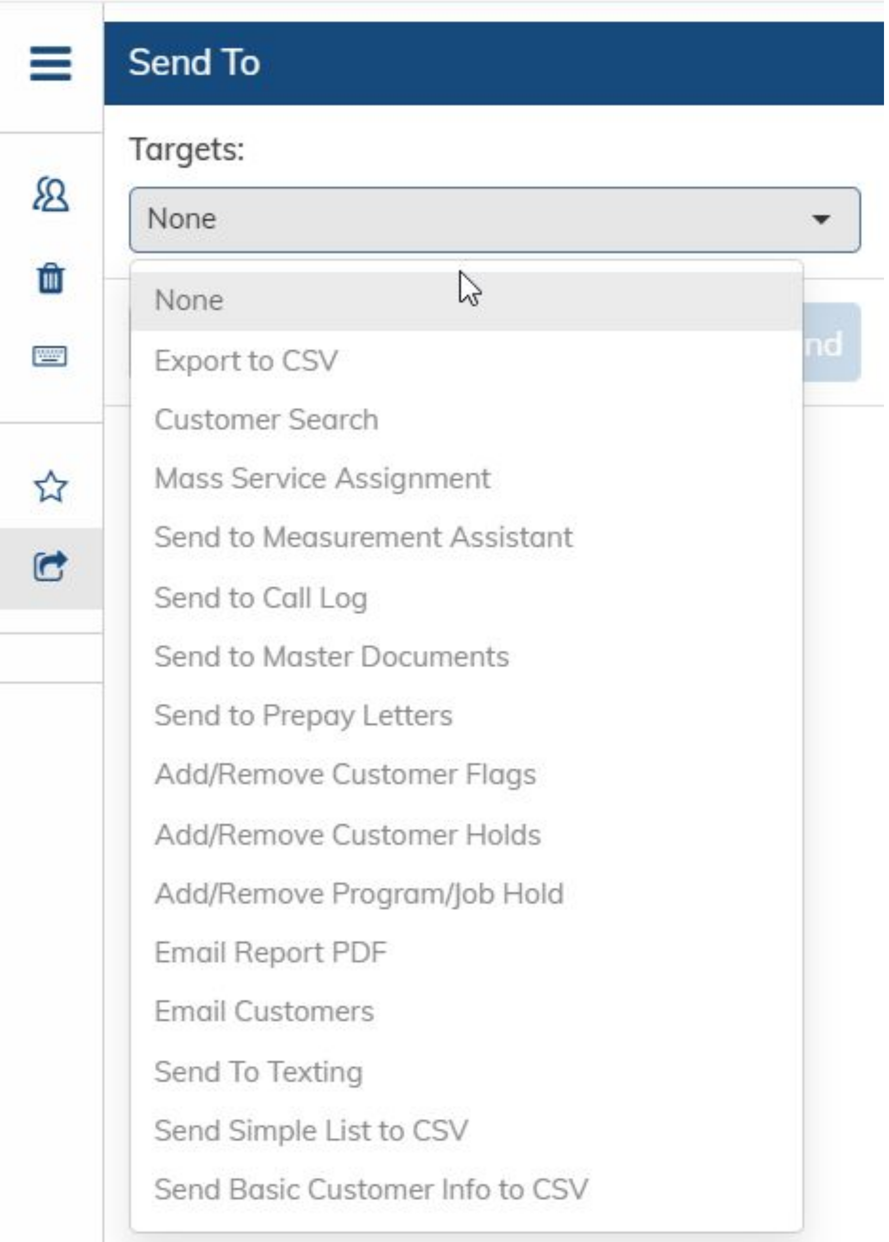


Report Basics

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.

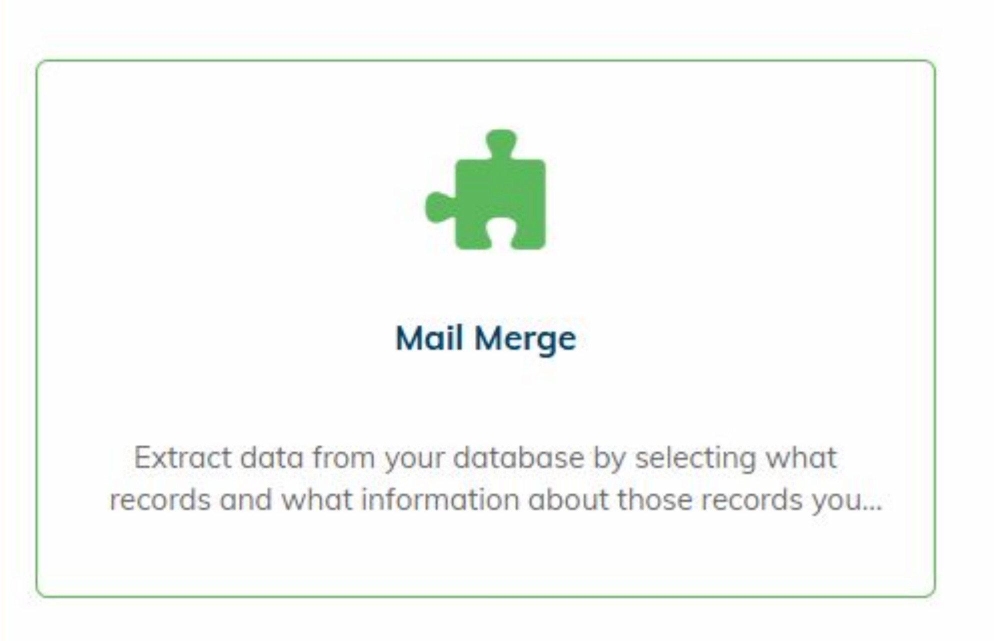
- Create and add a flagcode to a subset of customers.
- Run a subsequent report to add another flagcode, segmenting customers effectively.

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.



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.

Report Basics

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

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

Reset Changes

+ Add

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

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?