

Manager Enterprise Pro Reports

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INTRODUCTION

In this document, you will find a list of the reports available in Enterprise Pro to help you manage your shop(s). They will appear by category, similar to how they appear in the program and will include a brief description, if you can drill down for more information after executing report, the input parameters, and the columns names in the report.

The reports are customizable and can be saved to appear under My Reports or even added to the Dashboard for easy viewing. For assistance with customizing reports, please refer to the Help section in the program or view a brief tutorial by clicking on the following link: [Reports](#)

COMMON REPORTS

Employee

Attendance by Day- Shows a summary of all employees' daily attendance records. Drill down further for more details.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Employee, Date, Total Hours, Duration,*

Payroll Entry Details-Shows a list of payroll entry details in the specified date range. Drill down further for more details.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Pay Period Start, Pay Period, Pay Date, Employee, Type, Name, Rate, Quantity, Gross Pay, Employee, Employer, Net Pay*

Service Advisor Summary-Shows a summary of all invoice details broken down by Service Advisor in the specified date range. Drill down further for more details.

Input Parameters: *Date Range, Start Date, End Date, Location, Include In Progress Check Box*

Columns: *Name, Invoices, Packages, Labor Hours, Hours Clocked, Efficiency, Invoiced (L), Discount (L), Cost (L), Invoiced (P), Discount (P), Cost (P)*

Technician Efficiency- Shows technician efficiency in the specified date range. Drill down further for more detail.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Technician, Efficiency, Hours Clocked, Hours Billed*

Technician Summary- Shows a summary of invoice lines broken down by Technician in the specified date range. Drill down further for more details.

Input Parameters: *Date Range, Start Date, End Date, Location, Include In Progress Check Box*

Columns: *Name, Invoices, Packages, Labor Hours, Hours Clocked, Efficiency, Invoiced (L), Discount (L), Cost (L), Invoiced (P), Discount (P), Cost (P)*

Time Clock Statistics Extended- Shows productivity, efficiency, proficiency summarized by Technicians for all time clock entries in the specified date range. Drill down further for more details.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Employee, Invoiced Hours, Available Hours, Productive Hours, On the Job, Productivity, Efficiency, Proficiency, Productive, Productive Event, Non-Productive, Non- Productive %, Invoiced Hours, Parts Total, Labor Total, Sublet Total, Parts Discount, Labor Discount, Sublet Discount, Parts Cost, Labor Cost, Sublet Cost*

Financial

Cash Receipts Balance- Shows a summary of all cash receipt related transaction totals.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Name, Amount*

Inventory

Inventory Cost Report - Shows an inventory list by Profit Center and Service Category with Quantity, Cost, Core and Consignments. No drill down option.

Input Parameters: *Part Number, Description, Manufacturer, Size, Code, Type, Service Category, Location*

Columns: *Service Category, Type, Part Number, Description, Manufacturer, Supplier, Quantity, Cost Per, Definition, Core, Consignment Cost, Consignment*

Inventory Cost Summary – Shows inventory list with quantity in specified parameters. Drill down further for more details.

Input Parameters: *Grid, Service Category, Location*

Columns: *Profit Center, Service Category, Quantity, Cost, Core, Consignment Cost, Consignment*

Inventory Cost/Recount Report – Shows an inventory list to include quantity, total cost, per item cost by Service Category.

Input Parameters: *Part Number, Description, Manufacturer, Size, Code, Type, Service Category, Location*

Columns: *Service Category, Type Part Number, Description, Manufacturer, Size, Code, Grid, Supplier, High Order, Low Order, Quantity, Recount Quantity, Definition, Cost, Core, Consignment Cost, Consignment*

Inventory Dead Stock – Shows an inventory list to include Last Sold and Days since Last Sale within the specified parameters.

Input Parameters: *Description, Manufacturer, Size, Code, Type, Service Category, Location*

Columns: *Type, Part Number, Description, Manufacturer, Size, Code, Grid, Supplier, Quantity, Cost, Core, Last Sold, Days since Last Sold, Definition*

Inventory Listing - Shows an inventory list for the specified parameters.

Input Parameters: *Part Number, Description, Manufacturer, Size, Code, Type, Minimum Quantity, Service Category, Location*

Columns: *Service Category, Type, Part Number, Description, Manufacturer, Size, Code, Grid, Supplier, High Order, Low Order, In Stock, On Hold, Definition, On Work Order, Available*

Inventory Listing / Recount Report- Shows an inventory list to include High & Low order, On Hold values and In Stock recount per specified parameters.

Input Parameters: *Part Number, Description, Manufacturer, Size, Code, Type, Minimum Quantity, Service Category, Location*

Columns: *Service Category, Type, Part Number, Description, Manufacturer, Size, Code, Grid, Supplier, High Order, Low Order, In Stock, On Hold, In Stock, On Hold, In Stock Recount, Definition, On Work Order, Available*

Payable

Accounts Payable Account Value – Shows a summary of all accounts payable with a total per specified date range. Drill down further for more details.

Input Parameters: *Date, Location*

Columns: *Account, Account Name, Total*

Aged Accounts Payable – Shows a summary of all accounts payable with aged sub-totals. Drill down further for more information.

Input Parameters: *Accounting Term, Location*

Columns: *Account Name, Account #, Over 90+, over 60-90, Over 0-30, Due In 1-30, Due in 30-60, Total, Total Payable, Due in 60-90, Due 90+*

Payable Detailed Listing - Shows a detailed listing of all account payable by Supplier. Drill down further for more details.

Input Parameters: *Date range, Start Date, End Date, Location*

Columns: *Account Name, Posted, Due, Type, Description, Amount, Outstanding, Over 90 Days, Over 60 Days, Over 30 Days, Due Now, Account #*

Performance

Customer Loyalty – Displays the customer counts and percentages broken down by loyalty categories of New, Active, Inactive, Loyal and Dead

Input Parameters: *Date, Location, Category, New Customer Interval, Inactive Customer Interval, Dead Customer Interval, Loyal Customer Interval, Loyal Customer Spending, Loyal Customer Invoices*

Columns: *Type, Count, Percentage*

Purchase

Items To Be Returned – Shows a list of items to be returned to the Supplier for credit.

Input Parameters: *Location*

Columns: *Supplier, Type, Source, Manufacturer, Part Number, Description, Quantity, Cost, Core, Credit Slip Supplier, Credit Slip #*

Returned Item Listing – Shows a list of items returned using credit slip in the specified date range.

Input Parameters: *Date Range, Start Date, End Date, Supplier, Location*

Columns: *Supplier, Date, Type, Source, Status, Manufacturer, Part Number, Description, Quantity, Cost, Core, Credit Slip, Posted On*

Supplier Material Purchase Summary – Shows a total of material purchased from Suppliers in the specified date range. Drill down further for more details.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Supplier, Quantity, Cost, Core, Returned, Returned Cost, Returned Core, Net Quantity, Net Total*

Warranty Claim Item Listing – shows a list of warranty claim items in the specified date range. Drill down further for more details.

Input Parameters: *Date Range, Start Date, End Date, Vendor, Location*

Columns: *Vendor, Date, Type, Invoice #, Service Package, Description, Customer Paid, Cost, Claim Amount, Claim #, Posted On*

Warranty Claim Item Summary – Shows a summary of warranty claim items by Supplier.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Vendor, Material, Labor, Sublet, Total, Cost*

Receivable

Accounts Receivable Account Value – Shows a summary of all accounts receivable with a total as of the specific date.

Drill down further for more details.

Input Parameters: *Date, Location*

Columns: *Account #, Account #, Total*

Aged Accounts Receivable – Shows a summary of all accounts receivable with aged sub-totals. Drill down further for more details.

Input Parameters: *Accounting Term, Location*

Columns: *Account Name, Account #, Due In 30+, Due in 1-30, Over 0-30, Total, Over 30-60, Over 60-90, Over 90+*

Receivable Detailed Listing – Shows a detailed listing of all Accounts Receivable transactions. Please note that this report is based on Date Range and therefore will not match with current Account Receivable balance in General Ledger. Drill down further for more details.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Account Name, Posted, Due, Type, Description, Amount, Outstanding, Over 30 Days, Over 60 Days, Over 90 Days, Account #*

Sales / Vital Signs

Vital Signs By Service Advisor – Shows a summary of sales broken down by Service Advisor in the specified date range. Drill down further for more details.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Service Advisor, Part \$, Labor \$, Sublet \$*

Vital Signs by Service Category – Shows a summary of sales broken down by Profit Center / Service Category in the specified date range. Drill down further for more details.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Profit Center, Service Category, Parts \$, Labor \$, Sublet \$, Labor Mix \$, Parts Cost, Labor Cost, Sublet Cost, GP \$, GP %, Parts GP %, Total, Labor GP %, Sublet GP %, Sales Mix %*

Vital Signs By Technician - Shows a summary of sales broken down by Technician in the specified date range. Drill down further for more details.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Technician, Parts \$, Labor \$, Sublet \$, Labor Mix %, Parts Cost, Labor Cost, Sublet Cost, GP \$, GP %, Parts GP %, Total, Labor GP %, Sublet GP %*

Vital Signs Invoice Summary – Shows a summary of invoices in specified date range. Drill down further for more details.

Input Parameters: *Date Range, Start Date, End Date*

Columns: *Name, Value, Amount*

Sales

Deferred Work Summary - Shows a summary of deferred work in the specified date range.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Scheduled, Promised, Invoiced, Work Order #, Invoice #, Service Advisor, Technician, Mileage In, Mileage Out, Chapter, Service Package, Parts Total, Labor Total, Sublet Total, Remedied, File As, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1 & 2, Email, Source, Plate, Year, Make, Model, Sub model, Engine, VIN, Unit, Color*

Invoice Summary – Shows a summary of parts and labor break down for invoices in the specified date range. Drill down further for more details.

Input Parameters: *Date Range, Start Date, End Date, Location, Tax 1, Tax 2*

Columns: *Scheduled, Promised, Invoiced, Type, Work Order #, Invoice #, Service Advisor, Technician, Mileage In, Mileage Out, Total, Parts Total, Labor Total, Sublet Total, Parts Discount, Labor Discount, Sublet Discount, Parts Cost, Labor Cost, Sublet Cost, GP%, Labor Hours, Labor Hours Credit, Other Charge, Taxes All, Tax 1, Tax 2, MOP, File As, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1 & 2, Email, Source, Plate, Year, Make, Model, Sub Model, Engine, VIN, Unit, Color*

Invoice Summary by Service Advisor - Shows a summary of parts and labor break down for invoices by Service Advisor in the specified date range. Drill down further for more details.

Input Parameters: *Date Range, Start Date, End Date, Location, Tax 1, Tax 2*

Columns: *Invoiced, Invoice Number, Service Advisor, Parts Total, Labor Total, Sublet Total, Other Charge, Revenue w/o Tax, Parts Discount, Labor Discount, Sublet Discount, GP%, GP\$, Labor Hours*

Invoice Summary By Technician - Shows a summary of parts and labor break down for invoices by Technician in the specified date range. Drill down further for more details.

Input Parameters: *Date Range, Start Date, End Date, Location, Tax 1, Tax 2*

Columns: *Invoiced, Invoice Number, Service Advisor, Parts Total, Labor Total, Sublet Total, Other Charge, Revenue w/o Tax, Parts Discount, Labor Discount, Sublet Discount, GP%, GP\$, Labor Hours*

Material Sales Summary – Shows a summary of all material sales that can be broken down by Service Category in the specified date range.

Input Parameters: *Date Range, Start Date, End Date, Part Number, Description, Service category, Location*

Columns: *Part Number, Manufacturer, Description, Code, Size, Definition, Invoices, Credit Invoices, Inventory, Consignment, Supplied, Returned, Total, Discount, Invoiced, Cost*

Service Package Sales – Shows a list of service package sales for the specified location within the specified date range. Drill down further for more details.

Input Parameters: *Date Range, Start Date, End Date, Location, Code, Title, Service Category*

Columns: *Scheduled, Promised, Invoiced, Type, Work Order#, Invoice #, Service Advisor, Technician, Mileage In, Mileage Out, Invoice Total, Code, Service Package, Labor Hours, Parts Total, Labor Total, Sublet Total, Parts Cost, Labor Cost, Sublet Cost, File As, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1 & 2, Email, Source, Plate, Year, Make, Model, Sub model, Engine, VIN, Unit, Color*

Work In Progress Summary – Shows a summary of parts and labor break downs for work In progress in the specified date range.

Input Parameters: *Location, Skip on Hold Check Box*

Columns: *Scheduled, Promised, Last Modified, Type, Workflow Stage, Work Order #, Service Advisor, Technician, Mileage In, Mileage In, Mileage Out*

Tax

Other Charge Invoice Summary – Shows a summary of Other Charges / tax that's collected on invoices. Drill down further for more details.

Input Parameters: *Date Range, Start Date, End date, Location*

Columns: *Type, Code, Name, Amount*

ALL REPORTS

CRM

CRM Email Listing: Shows a list of CRM emails sent.

Input Parameters: *Date Range, Start Date, End Date, Type, Location.*

Columns: *Date, Type, Name, Email Address, Sent, Rejected, Read, Unsubscribed*

CRM Email Returns: Shows return on investment for emails sent in the specified date range.

Input Parameters: *Date Range, Start Date, End Date, Days to Include, Location.*

Columns: *File As, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone1 & 2, email, Source, Plate, Year, Make, Model, Sub model, Engine, VIN, Unit, Color, Date, Type, Emails, Last Visit Before, Total Visits, Total Spending, Last Visit After.*

CRM Email Returns Summary: Shows a summary for return on investment for emails sent in the specific date range.

Input Parameters: *Date Range, Start Date, End Date, Days to Include, Location.*

Columns: *Type, Emails Sent, Returns, Returns %, Returns \$, Average return.*

CRM Email Summary: Shows a summary of CRM email sent.

Input Parameters: *Date Range, Start date, End Date, Location*

Columns: *Type, Count, Sent, Rejected, Read, Unsubscribed.*

CRM Post Card Listing: Shows a list of postcards sent.

Input Parameters: *Date Range, Start Date, End Date, Type, Location.*

Columns: *Date, Type, Name, Street, City, State, Zip, Country, Sent, Rejected.*

CRM Post Card Returns: Shows data for return on investment for postcards sent within specified date range.

Input Parameters: *Date Range, Start Date, End Date, Days to Include, Location.*

Columns: *File As, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1 & 2, Email, Source, Plate, Year, Make, Model, Sub model, Engine, VIN, Unit, Color, Date, Type, Post Cards, Last Visit Before, Total Visits, Total Spending, Last Visit After.*

CRM Post Card Returns Summary: Shows summary for return on investment for postcards sent in specified date range.

Input Parameters: *Date Range, Start Date, End Date, Days to Include, Location.*

Columns: *Type, Post Cards Sent, Returns, Return%, Return \$, Return Average.*

CRM Post Card Summary: Shows a summary of CRM Post Cards sent.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Type, Count, Sent, Rejected*

CRM Post Card Returns Summary: Shows a list of CRM Post cards sent based on billing dates.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Type, Count, Sent, Rejected, Billable*

Customer Follow Up: Shows a summary of invoices and services on the invoices for the specified location in the specified date range. Drill Down further for additional details on the invoices.

Input Parameters: *Date Range, Start Date, End Date, Location.*

Columns: *Scheduled, Promised, Invoiced, Type, Work Order#, Invoice #, Service Advisor, Technician, Mileage In, Mileage Out, Total, Parts Total, Labor Total, Sublet Total, MOP, Concerns, Inspections, Services, Deferred, File as, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1 & 2, Email, Method, Source, Plate, Year, Make, Model, Sub model, Engine, VIN, Unit, Color.*

Deferred Work Mailer: Shows a list of deferred works in the specified date range for mailer purposes.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *File As, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip Code, Country, Phone 1 & 2, Email, Method, Source, Plate, Year, Make, Model, Sub model, Engine, VIN, Unit, Color, Deferred*

Employee

Payroll

Payroll Entry Details: Shows a list of payroll entry details within a specific date range.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Pay Period Start, Pay Period End, Pay Date, Employee, Type, Name, Rate, Quantity, Gross Pay, Employee Amount, Net Pay, Employer Amount,*

Payroll Item Listing: Shows a list of payroll items in a specific date range.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Pay Period Start, Pay Period End, Pay Date, Employee, Type, Name, Rate, Quantity, Amount.*

Payroll Item Summary: Shows a summary of payroll items in the specified date range. Drill down further to show additional details on each employee.

Input Parameters: *Date Range, Start date, End Date, Location*

Columns: *Employee, Type, Name, Total*

Payroll Summary: Shows a list of payroll summary in the specified date range.

Input parameter: *Date Range, Start date, End Date, Location*

Columns: *Employee, Gross Pay, Employee Amount, Net Pay, Employer Amount*

Time Clock

Attendance: Shows list of employee's attendance within date range. Drill down further to show daily attendance totals.

Input Parameters: *Date Range, Start date, End Date, Location*

Columns: *Employee, Employee Type, Total Hours, Duration*

Attendance by Day: Shows a summary of all employees' daily attendance. Drill down further to show detail records for a particular day.

Input Parameters: *Date Range, Start date, End Date, Location*

Columns: *Employee, Employee Type, Date, Total Hours, Duration*

Attendance by Day (User): Shows a summary of current employee's daily attendance.

Input Parameters: *Date Range, Start date, End Date, Employee, Location*

Columns: *Date, Total Hours, Duration*

Attendance Record: Shows a list of all employees' attendance records within date range.

Input Parameters: *Date Range, Start date, End Date, Location*

Columns: *Employee, Employee Type, Clocked In, Clocked Out, Hours, Duration, Note*

Attendance Record (User): Shows a list of current employee attendance records within the date range.

Input Parameters: *Date Range, Start date, End Date, Employee, Location*

Columns: *Clocked In, Clocked Out, Hours, Duration, Note*

Time Clock Active Item: Shows a list of all employees' active time clock items.

Input Parameters: *Location*

Columns: *Employee, Employee Type, Type, Item, Clocked In, Hours, Duration*

Time Clock Efficiency: Shows Technician efficiency reportable by date range. Drill down further to show additional detail on each Technician.

Input Parameters: *Date Range, Start date, End Date, Location*

Columns: *Technician, Efficiency, Hours Clocked, Hours Billed*

Time Clock Invoice Summary: Shows technician efficiency summarized by invoices in the specified date range. Drill down further to show additional details on the invoices.

Input Parameters: *Date Range, Start date, End Date, Location*

Columns: *Work order #, Invoice #, Efficiency, Hours Clocked, Hours Billed, Scheduled, Promised, Invoiced, Mileage In, Mileage Out, Total, Parts Total, Labor Total, Sublet Total, Parts Cost, Labor Cost, Sublet Cost, GP%, File As, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1 & 2, E-Mail, Plate, Year, Make, Model, Sub model, Engine, Vin, Unit, Color*

Time Clock Job Efficiency: Shows time clock efficiency per technician per job in the specified date range including active work orders.

Input Parameters: *Date Range, Start date, End Date, Location, Include In Progress Check Box*

Columns: *Technician, Invoice, Work Order, Service Category, Service Package, Active, Started On, Hours Clocked, Hours Billed, Efficiency, Year, Make, Model.*

Time Clock Record: Shows a list of all employees' active time clock records within the date range.

Input Parameters: *Date Range, Start date, End Date, Location*

Columns: *Type, Item, Employee, Employee Type, Clocked In, Clocked Out, Hours, Duration, Note.*

Time Clock Record (User): Shows a list of current employee time clock records within the date range.

Input Parameters: *Date Range, Start date, End Date, Employee, Location*

Columns: *Type, Item, Clocked In, Clocked Out, Hours, Duration, Note.*

Time Clock Statistics: Shows productivity and event hours summarized by technicians for all time clock entries clocked in the specified date range. Drill down further to show additional details summarized by work orders.

Input Parameters: *Date Range, Start date, End Date, Location*

Columns: *Employee, Employee Type, Available Hours, Productive Hours, On the Job, Productivity, Productive Mix, Productive Event, Non Productive, Non Productive, Non Productive.*

Time Clock Statistics (User): Shows productivity and event hours summarized by current technician.

Input Parameters: *Date Range, Start date, End Date, Employee, Location*

Columns: *Employee Type, Available Hours, Productive Hours, On the Job, Productivity, Productive Mix, Productive Event, Non Productive, Non Productive, Non Productive.*

Time Clock Statistics Extended: Shows productivity, efficiency and proficiency summarized by technician for all time clock entries clocked in the specified date range. Drill down further to show additional details summarized by work order.

Input Parameters: *Date Range, Start date, End Date, Location*

Columns: *Employee, Employee Type, Invoiced Hours, Invoiced Hours Credit, Available Hours, Productive Hours, On the Job, Productivity, Efficiency, Proficiency, Productive Mix, Productive Event, Non Productive, Non Productive, Non Productive.*

Time Clock Statistics Extended (User): Shows productivity, efficiency and proficiency by current technician for all time clock entries in the specified date range.

Input Parameters: *Date Range, Start date, End Date, Employee, Location*

Columns: *Employee Type, Invoiced Hours, Available Hours, Productive Hours, On The Job, Productivity, Efficiency, Proficiency, Productive Mix, Productive Event, Non Productive, Non Productive, Non Productive.*

Service Advisor

Service Advisor Summary: Shows a summary of invoice details broken down by Service Advisor in the specified date range. Drill down further to show additional details on the line level.

Input Parameters: *Date Range, Start Date, End Date, Location, Include In Progress checkbox*

Columns: *Name, Invoices, Packages, Hours, Invoiced (P), Discount (P), Cost (P), Invoiced (L), Discount (L), Cost (L), Invoiced (S), Discount (S), Cost(S), Total Invoiced, Total Discount, Total Cost*

Service Advisor Summary (User): Shows a summary of invoice details broken down for the current Service Advisor in the specified date range.

Input Parameters: *Date Range, Start date, End Date, Employee, Location Include In Progress Check Box*

Columns: *Invoices, Packages, Hours, Invoiced (P), Discount (P), Cost (P), Invoiced (L), Discount (L), Cost (L), Invoiced (S), Discount (S), Cost(S), Total Invoiced, Total Discount, Total Cost*

Service Advisor Summary by Invoice: Shows a summary of invoices by Service Advisor in the specified date range.

Input Parameters: *Date Range, Start date, End Date, Location, Include in progress check box*

Columns: *Name, Scheduled, Promised, Date, Type, Invoice, Work Order, Mileage In, Mileage Out, Hours, Invoiced (P), Discount (P), Cost (P), Invoiced (L), Discount (L), Cost(L), Invoiced (S), Discount (S), Cost(S) , Total Invoiced, Total Discount, Total Cost*

Service Advisor Summary by Invoice (User): Shows a summary of invoices for current Service Advisor in the specified date range.

Input Parameters: *Date Range, Start date, End Date, Service Advisor, Location, Include In Progress Check Box*

Columns: *Scheduled, Promised, Date, Date, Type, Invoice, Work Order, Mileage In, Mileage Out, Hours, Invoiced (P), Discount (P), Cost (P), Invoiced (L), Discount (L), Cost(L), Invoiced (S), Discount (S), Cost(S) , Total Invoiced, Total Discount, Total Cost*

Service Advisor Summary by Service Package Line Group: Shows a summary of service package line group details by Service Advisor in the specified date range.

Input Parameters: *Date Range, Start date, End Date, Service Advisor, Location*

Columns: *Name, Count, All*

Service Advisor Summary List by Service Package Line Group: Shows a summary of service package line group details for all Service Advisors within the specified date range.

Input Parameters: *Date Range, Start date, End Date, Location*

Columns: *Name, All*

Technician

Technician Summary: Shows a summary of invoice line details broken down by Technician in the specified date range. Drill down further to show additional details on the line level.

Input Parameters: *Date Range, Start date, End Date, Location, Include In Progress Check Box*

Columns: *Name, Invoices, Packages, Hours Billed, Hours Clocked, Efficiency, Invoiced (P), Discount (P), Cost (P), Invoiced (L), Discount (L), Cost (L), Invoiced (S), Discount (S), Cost(S), Total Invoiced, Total Discount, Total Cost*

Technician Summary (User): Shows a summary of invoice line details for current Technician in the specified date range.

Input Parameters: *Date Range, Start date, End Date, Technician, Location, Include in progress check box*

Columns: *Invoices, Packages, Hours Billed, Hours Clocked, Efficiency, Invoiced (P), Discount (P), Invoiced (L), Discount (L), Invoiced (S), Discount (S), Total Invoiced, Total Discount, Total Cost*

Technician Summary by Invoice: Shows a summary of invoices by Technician in the specified date range.

Input Parameters: *Date Range, Start date, End Date, Location, Include in Progress check box*

Columns: *Name, Scheduled, Promised, Date, Type, Invoice, Work Order, Mileage In, Mileage Out, Hours Billed, Hours Clocked, Efficiency, Invoiced (P), Discount (P), Cost (P), Invoiced (L), Discount (L), Cost (L), Invoiced (S), Discount (S), Cost(S), Total Invoiced, Total Discount, Total Cost*

Technician Summary by Invoice (User): Shows a summary of invoices by the current Technician in specified date range.

Input Parameters: *Date Range, Start date, End Date, Technician, Location, Include In Progress check box*

Columns: *Scheduled, Promised, Date, Type, Invoice, Work Order, Mileage In, Mileage Out, Hours Billed, Hours Clocked, Efficiency, Invoiced (P), Discount (P), Invoiced (L), Discount (L), Invoiced (S), Discount (S), Total Invoiced, Total Discount, Total Cost*

Technician Summary by Service Package Line Group: Shows a summary of service package line group details by technicians in the specified date range.

Input Parameters: *Date Range, Start date, End Date, Technician, Location*

Columns: *Name, Count, All*

Technician Summary list by Service Package Line Group: Shows a service package line group details for all technicians in the specified date range.

Input Parameters: *Date Range, Start date, End Date, Location*

Columns: *Name, All*

Financial

Bank Account Reconciliations: Shows a list of Bank Account reconciliation in the specified date range.

Input Parameters: *Date Range, Start Date, End Date, Bank Account, Location*

Columns: *Number, Statement Date, From, To, Statement Amount, Ledger Amount, Outstanding*

Bank Account Summary: Shows a summary of bank account values in the specified date range. Drill down further to show additional details on the transaction level.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Type, Name, Description, Account #, Opening Balance, Ending Balance, Difference*

Bank Account Transactions: Shows a list of bank account transactions in the specified date range.

Input Parameters: *Date Range, Start Date, End Date, Bank Account, Location*

Columns: *Date Number, Description, Amount*

Cash Receipt Balance: Shows a summary of all cash receipt related transaction totals.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Name, Amount*

Cash Receipts: Shows a list of all cash receipts in the specified date range.

Input Parameters: *Date Range, Start Date, End Date, Location, Include Receivable Check Box*

Columns: *Date, Description, Amount, Payment Method, Deposited, Deposited On*

Deposit Listing: Shows a list of outstanding deposits.

Input Parameters: *Location*

Columns: *Date, Description, Amount, Workflow Stage, Work Order #, Service Advisor, Technician, Total, File As Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1 & 2, Email, Source*

Invoice Cash Receipts Consolidation: Shows a list of all invoices and the related payments data.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Invoiced, Type, Work Order, Invoice #, File As, Total, Cash, Check, Deposit, Receivable*

Inventory

Inventory Batch List: Shows a list of inventory batches that matches the search criteria. Inventory is searchable by part number, description, manufacturer, and size code and service category.

Input Parameters: *Part Number, Description, Manufacturer, Size, Code, Service Category, Location*

Columns: *Definition, Part Number, Description, Manufacturer, Size, Code, Type, Date Received, Days in Stock, Quantity, Cost, Core*

Inventory Cost Report: Shows the inventory in stock quantities and total cost that matches the search criteria.

Input Parameters: *Part Number, Description, Manufacturer, Size, Code, Type, Service Category, Location*

Columns: *Service Category, Type, Definition, Part Number, Description, Manufacturer, Size, Code, Grid, Supplier, High Order, Low Order, Quantity, Cost. Core, Consignment Cost, Consignment Core, Cost Per*

Inventory Cost Summary: Shows the inventory in stock quantities and total costs by Service Category. Drill down further to show inventory materials details.

Input Parameters: *Grid, Service Category, Location*

Columns: *Profit Center, Service Category, Quantity, Cost, Core, Consignment Cost, Consignment Core*

Inventory Dead Stock: Shows inventory and date last sold according to specified date range. Inventory material is searchable by description, manufacturer, size, code, service category.

Input Parameters: *Part Number, Description, Manufacturer, Size, Code, Service Category, Location*

Columns: *Type, Definition, Part Number, Description, Manufacturer, Size, Code, Grid, Supplier, High Order, Low Order, Quantity, Cost. Core, Consignment Co, Consignment Co, Cost, Core, Last Sold, Days since Last Sold*

Inventory Historical Cost Report: Shows the inventory in stock quantities and total costs back in history that matches search criteria.

Input Parameters: *Date, Part Number, Description, Manufacturer, Size, Code, Type, Service category, Location*

Columns: *Service category, Type, Definition, Part Number, Description, Manufacturer, Size, Code, Grid, Supplier, High Order, Low Order, Quantity, Cost, Core, Consignment Cost, Consignment Core, Cost per*

Inventory Listing: Shows the inventory list.

Input Parameters: *Part Number, Description, Manufacturer, Size, Code, Type, Minimum Quantity, Service Category, Location*

Columns: *Service Category, Type, Definition, Part Number, Description, Manufacturer, Size, Code, Grid, Supplier, High Order, Low Order, In stock, On hold*

List

Contact List: Shows a list of contacts for the specified location within the search criteria.

Input Parameters: *Name, City, State, Zip, Category, Location*

Columns: *File As, Company, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1 & 2, Email, Source, Notes, No Email, No Post Card, First Invoice, Last Invoice, Last Invoice Total, Invoices, Invoice Total, Credit Invoices, Credit Invoice Total*

Contact List with Attributes: Shows the list of contacts and attributes for the specified location within the search criteria

Input Parameters: *Name, City, State, Zip, Category, Attribute 1, Attribute 2, Attribute 3, Location*

Columns: *File As, Company, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1 & 2, Email, Source, Notes, No Email, No Post Card, First Invoice, Last Invoice, Last Invoice Total, Invoices, Invoice Total, Credit Invoices, Credit Invoice Total, Attribute, Attribute 1, Attribute 2, Attribute 3*

Email List: Shows a summary of email addresses

Input Parameters: *Show Alternate Box, Location*

Columns: *File As, Company, Prefix, First, Middle, Last, Suffix, Rank, Title, Email, Valid*

Email Summary: Shows a summary of email addresses

Input Parameters: *None*

Columns: *Location, Total Emails, Valid Emails, Invalid Emails*

Service Item List: Shows a list of service items/vehicles for specified location within search criteria

Input Parameters: *Name, City, State, Zip, Category, Service item, Location*

Columns: *File As, Company, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1 & 2, Email, Source,, Plate, Year, Make, Model, Sub model, Engine, Vin, Unit #, Color, Usage, Notes, No Email, No Post Card, Last Invoice, Last Invoice Total, Invoices, Invoice Total, Credit Invoices, Credit Invoice Total*

Service Package Template List: Shows the list of service package templates with the specified search criteria

Input Parameters: *Location, Keyword*

Columns: *Profit Center, Service Category, Code, Type, Title, Description, Duration, Hidden*

Supplier List: Shows a List of suppliers for the specified location within specified search criteria

Input Parameters: *Name, Location*

Columns: *File As, Street, City, State, Zip, Country, Phone 1 & 2, Email, Online Order, Credit Limit, Notes, Connection Type, Catalog Type, Account #, Account*

Payable

Accounts Payable Account Value: Shows a summary of all Accounts Payable with a Total as of a Specific Date. Drill down further to show additional details on transaction level.

Input Parameters: *Date, Location*

Columns: *Account #, Account Name, Total.*

Accounts Payable Aged: Shows a summary of all accounts payable with aged subtotals.

Input Parameters: *Accounting Term, Location*

Columns: *Account #, Account Name, Over 90+, Over 60-90, Over 30-60, Over 0-30, Due in 1-30, Due in 30-60, Due in 60-90, Due in 90+, Total, Total Payables Now*

Payable Detailed Listing: Shows a detailed listing of all accounts payable transactions

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Account #, Account Name, Posted, Due, Type, Description, Amount, Outstanding, Over 90, Over 60 days, Over 30 days, Due Now*

Performance

Loyalty

Customer Loyalty: Display the customer counts and percentages broken down in categories of New, Active, Loyal, Inactive, Dead (See Appendix A for explanation of default entries)

Input Parameters: *Date, Location, Category, New Customer Interval, Inactive Customer Interval, Dead Customer Interval, Loyal Customer Interval, Loyal Customer Spending, Loyal Customer Invoices*

Columns: *Type, Count, Percentage*

Reward Card Loyalty: Display the customer counts and percentages with reward card and without reward card broken down into categories of New, Active, Loyal, Inactive, Dead. (See Appendix A for explanation of default entries)

Input Parameters: *Date, Location, Category, New Customer Interval, Inactive Customer Interval, Dead Customer Interval, Loyal Customer Interval, Loyal Customer Spending, Loyal Customer Invoices, Invoice Statistics Interval*

Columns: *Type, Count (Reward), Count (None), Percentage (Reward), Percentage (None), Average (Reward), Average (None), Visits (Reward), Visits (None), Total \$ Reward, Total \$ (None)*

Service Item Loyalty: Shows the summary of service items broken down by the vehicle type in the specified date range.

Input Parameters: *Date, Location, Category, New Customer Interval, Inactive Customer Interval, Dead Customer Interval, Loyal Customer Interval, Loyal Customer Spending, Loyal Customer Invoices*

Columns: *Type Count, Percentage*

Invoice Statistics: Shows a summary if invoices breakdowns for location within specified date range. Drill down further to show additional details per invoice.

Input Parameters: *Date Range, Start Date, End Date*

Columns: *Location, Invoices, First Invoice, Last Invoice, Invoice/Day, Average Invoice*

Reward Card Lift and Shift: Shows a list of card holders with spending on the selected period and for the same period previous.

Input Parameters: *Date Range, Start Date, End Date, Reward Card, Location*

Columns: *Reward Card, Reward Card Number, Reward Card Amount, Visits, Total, Previous Visits, Previous Totals, Last Year Visits, Last Year Total, New, File As, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Phone 1 & 2, Email, Source*

Reward Card Line Item Sales: Shows a list of line item sales with reward card grouped by contact for the specified location within specified date range

Input Parameters: *Date, Range, Start Date, End Date, Contact Name< Category, Type, Description, Service Category, Location*

Columns: *File As, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1 & 2, Source, Model, Sub Model, Engine, VIN, Unit #, Color, Invoiced, Type, Work Order, Invoice, Reward Card, Reward Card #, Reward Amount, Service Advisor, Technician, Line Type, Service category, Service Package, Part Number, Description, Manufacturer, Price, Quantity, Total, Discount, Invoiced, Cost, Other Charge*

Reward Card Sales Summary (Trend): Shows a list of line item sales with reward card and without reward cards within specified date range

Input Parameters: *Today, Start Date, End Date, Location, Interval, Interval Type*

Columns: *Start Date, End Date, Average \$ (Reward), Average (None), Average % (diff) Visits (Reward) Visit (None). Visits % (Diff) Total \$ (Reward), Total \$ (None), Total % (Diff)*

Reward Card Transaction List: Shows a list of Reward Card transactions and the invoice information in the specified date range

Input Parameters: *Date Range, Start Date, End date, Reward Card, Location*

Columns: *Invoiced, Type, Work Order #, Invoice #, Service Advisor, Part \$, Labor \$, Sublet \$, Invoice \$, Reward card, Reward Card #, Reward Amount, File As, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1 & 2*

Purchase

Items to Be Returned: Shows a list of returned items that have yet to be returned or do not have a credit slip.

Input Parameters: *Location.*

Columns: *Supplier, Type, Source, Manufacturer, Part #, Description, Quantity, Cost, Core, Credit Slip Supplier, Credit Slip#*

Return Item Listing: Shows a list of returned items

Input Parameters: *Date Range, Start Date, End Date, Supplier, Location*

Columns: *Supplier, Date, Type, Source, Status, Manufacturer, Part #, Description, Quantity, Cost, Core, Credit Slip #, Posted On*

Return Item Summary: Shows a total of returned items

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Supplier, Quantity, Cost, Core*

Supplier Material Purchase Listing: Shows a list of materials purchased from suppliers.

Input Parameters: *Date Range, Start Date, End Date, Supplier, Location*

Columns: *Supplier, Date, Invoice #, Type, Manufacturer, Part #, Description, Quantity, Cost, Core, Returned, Returned Cost, Returned Core, Net Quantity, Net Total*

Supplier Material Purchase Summary: Shows a total summary of materials purchased from suppliers.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Supplier, Description, Quantity, Cost, Core, Returned, Returned Cost, Returned Core, Net Quantity, Net Total*

Warranty Claim Item Listing: Shows a list of warranty claim items.

Input Parameters: *Date Range, Start Date, End Date, Vendor, Location*

Columns: *Vendor, Date, Type, Invoice #, Service Package, Description, Customer Paid, Cost, Claim Amount, Claim #, Posted On, Chargeback Tech, Charge, File As, Prefix, First, Middle, Last, Suffix, Plate, Year, Make, Model, Sub Model, Engine, Vin, Unit*

Warranty Claim Item Summary: Shows a total summary of warranty claim items.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Vendor, Material, Labor, Sublet, Total, Cost*

Receivable

Accounts Receivable Account Value: Shows a summary of all accounts receivable with a total as of a specific date. Drill down further to show additional details on transaction level.

Input Parameters: *Date, Location*

Columns: *Account #, Account Name, Total*

Accounts Receivable Aged: Shows a summary of all accounts receivable with aged sub-totals. Drill down further to show additional details on the transaction level.

Input Parameters: *Accounting Term, Location*

Columns: *Account #, Account Name, Due in 30+, Due in 1-30, Over 0-30, Over 30-60, Over 60-90, Over 90+, Total*

Accounts Receivable Aged Calendar Day: Shows a summary of all accounts receivable with aged sub-totals. Drill down further to show additional details on the transaction level.

Input Parameters: *Accounting Term, Location*

Columns: *Account #, Account Name, Future, Next Month, Current Month, Last Month, Over 1 Month, Over 2 Months, Over 3 Months, Total*

Receivable Detailed Listing: Shows a detailed listing of all accounts receivable transactions. Drill down further to show additional details on the transaction level.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Account #, Account Name, Posted, Due, Type, Description, Amount, Outstanding, Over 30 Days, Over 60 days, Over 90 Days.*

Royalty

Royalty By Service Category: Shows royalty values by service category. Drill down further to show invoice details.

Input Parameters: *Date Range, Start Date, End Date, Location, Include Only If Paid check box, Assume Paid in Days*

Columns: *Profit Center, Service Category, Invoices, Credit Invoices, Total, Discount, Invoiced, Rate 1, Royalty 1, Rate 2, Royalty 2, Rate 3, Royalty 3*

Royalty By Service Category Summary: Shows total royalty values by Service Category. Drill down further to royalty details

Input Parameters: *Date Range, Start Date, End Date, Include Only If Paid check box, Assume Paid in Days*

Columns: *Total, Discount, Invoiced, Royalty 1, Royalty 2, Royalty 3*

Royalty By Service Package Line Group: Shows royalty values by service package line. Drill down further to show details.

Input Parameters: *Date Range, Start Date, End Date, Location, Include Only If Paid check box, Assume Paid in Days*

Columns: *Name, Invoices, Credit Invoices, Total, Discount, Invoiced, Rate 1, Royalty 1, Rate 2, Royalty 2, Rate 3, Royalty 3*

Royalty By Service Package Line Group Summary: Shows royalty values by service package line group. Drill down to show royalty details

Input Parameters: *Date Range, Start Date, End Date, Include Only If Paid check box, Assume Paid in Days*

Columns: *Location, Total, Discount, Invoiced, Royalty 1, Royalty 2, Royalty 3*

Sales

Vital Signs

Vital Signs by Contact Categories: Shows a summary of sales summary broken down by the contact and contact categories in the specified date range. Drill down further to show additional details on the invoice level.

Input Parameters: *Date Range, Start Date, End Date.*

Columns: *Name, Parts \$, Labor \$, Sublet \$, Labor Mix \$, Parts Cost, Labor Cost, Sublet Cost, GP \$, GP %, Parts GP %, Total, Labor GP %, Sublet GP %*

Vital Signs by Service Advisor: Shows a summary of sales summary broken down by the service advisor in the specified date range. Drill down further to show additional details on the invoice level.

Input Parameters: *Date Range, Start Date, End Date.*

Columns: *Service Advisor, Parts \$, Labor \$, Sublet \$, Labor Mix \$, Parts Cost, Labor Cost, Sublet Cost, GP \$, GP %, Parts GP %, Total, Labor GP %, Sublet GP %*

Vital Signs by Service Advisor (User): Shows a summary of sales summary broken down by the current service advisor in the specified date range. Drill down further to show additional details on the invoice level.

Input Parameters: *Date Range, Start Date, End Date.*

Columns: *Service Advisor, Parts \$, Labor \$, Sublet \$, Labor Mix \$, Parts Cost, Labor Cost, Sublet Cost, GP \$, GP %, Parts GP %, Total, Labor GP %, Sublet GP %*

Vital Signs by Service Category: Shows a summary of sales summary broken down by service categories in the specified date range. Drill down further to show additional details on the invoice level.

Input Parameters: *Date Range, Start Date, End Date.*

Columns: *Profit Center, Service Category, Parts \$, Labor \$, Sublet \$, Labor Mix \$, Parts Cost, Labor Cost, Sublet Cost, GP \$, GP %, Parts GP %, Total, Labor GP %, Sublet GP %, Sales Mix %*

Vital Signs by Service Category (Previous Period Consumption): Shows a summary of sales summary broken down by service categories in the specified date range. The data is compared with the numbers from the previous period from the specified date range.

Input Parameters: *Date Range, Start Date, End Date.*

Columns: *Profit Center, Service Category, Parts \$, Parts \$ (P), Parts \$ (Diff), Parts % (Diff), Labor \$, Labor \$ (P), Labor \$ (Diff), Labor % (Diff), Sublet \$, Sublet \$ (P), Sublet \$ (Diff), Sublet % (Diff), Labor Mix %, Labor Mix % (P), Parts Cost, Parts Cost (P), Parts Cost (Diff), Parts Cost % (Diff), Labor Cost, Labor Cost (P), Labor Cost (Diff), Labor Cost % (Diff), Sublet Cost,*

Vital Signs by Service Category (Previous Period Trend): Shows a summary of sales summary broken down by interval in the specified date range. The data is compared with the numbers from the previous period from the specified date range.

Input Parameters: *Date Range, Start Date, End Date.*

Columns: *Start Date, Start Date (P), Parts \$, Parts \$ (P), Parts \$ (Diff), Parts % (Diff), Labor \$, Labor \$ (P), Labor \$ (Diff), Labor % (Diff), Sublet \$, Sublet \$ (P), Sublet \$ (Diff), Sublet % (Diff), Labor Mix %, Labor Mix % (P), Parts Cost, Parts Cost (P), Parts Cost (Diff), Parts Cost % (Diff), Labor Cost, Labor Cost (P), Labor Cost (Diff), Labor Cost % (Diff), Sublet Cost,*

Sublet Cost (P), Sublet Cost (Diff), Sublet Cost % (Diff), GP \$, GP \$ (P), GP \$ (Diff), GP % (Diff), GP %, GP % (P), Parts GP %, Parts GP % (P), Total, Total (P), Total (Diff), Total % (Diff)

Vital Signs by Service Category (Previous Year Comparison): Shows a summary of sales summary broken down by service categories in the specified date range. The data is compared with the numbers from the previous year from the specified date range.

Input Parameters: *Date Range, Start Date, End Date.*

Columns: *Profit Center, Service Category, Parts \$, Parts \$ (LY), Parts \$ (Diff), Parts % (Diff), Labor \$, Labor \$ (LY), Labor \$ (Diff), Labor % (Diff), Sublet \$, Sublet \$ (LY), Sublet \$ (Diff), Sublet % (Diff), Labor Mix %, Labor Mix % (LY), Parts Cost, Parts Cost (LY), Parts Cost (Diff), Parts Cost % (Diff), Labor Cost, Labor Cost (LY), Labor Cost (Diff), Labor Cost % (Diff), Sublet Cost, Sublet Cost (LY), Sublet Cost (Diff), Sublet Cost % (Diff), GP \$, GP \$ (LY), GP \$ (Diff), GP % (Diff), GP %, GP % (LY), Parts GP %, Parts GP % (LY), Total, Total (LY), Total (Diff), Total % (Diff)*

Vital Signs by Service Category (Trend): Shows sales summary comparison of two service categories broken down by date period in the specified date range.

Input Parameters: *Date Range, Start Date, End Date.*

Columns: *Start Date, End Date, Parts \$ (1), Parts \$ (2), Labor \$ (1), Labor \$ (2), Labor % (1), Labor % (2), Sublet \$ (1), Sublet \$ (2), Parts Cost (1), Parts Cost (2), Labor Cost (1), Labor Cost (2), Sublet Cost (1), Sublet Cost (2), GP \$ (1), GP \$ (2), GP % (1), GP % (2), Parts GP % (1), Parts GP % (2), Total (1), Total (2),*

Vital Signs by Technician: Shows a summary of sales summary broken down by the technician in the specified date range. The report can be further drilled down to show additional details on the invoice level.

Input Parameters: *Date Range, Start Date, End Date.*

Columns: *Technician, Parts \$, Labor \$, Sublet \$, Labor Mix %, Parts Cost, Labor Cost, Sublet Cost, GP \$, GP %, Parts GP %, Total, Labor GP %, Sublet GP %*

Vital Signs by Technician (User): Shows a summary of sales summary broken down by the current technician in the specified date range. The report can be further drilled down to show additional details on the invoice level.

Input Parameters: *Date Range, Start Date, End Date*

Columns: *Technician, Parts \$, Labor \$, Sublet \$, Labor Mix %, Parts Cost, Labor Cost, Sublet Cost, GP \$, GP %, Parts GP %, Total, Labor GP %, Sublet GP %*

Vital Signs Invoice Summary: Shows a summary of invoices in the specified date range. The report can be further drilled down to show additional details on the invoice level.

Input Parameters: *Date Range, Start Date, End Date*

Columns: *Name, Value, Amount*

Customer Spending: Shows the list of the customer's spending broken down by the customer for the specified location in the specified date range. The report can be further drilled down to show additional details on the invoice level.

Input Parameters: *Date Range, Start Date, End Date*

Columns: *File As, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1, Phone 2, Email, Source, Invoices, Credit Invoices, Total, Average, Last Invoiced, Last Invoice #, Last Invoice Total*

Deferred Work Summary: Shows a summary of deferred works in the specified date range

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Scheduled, Promised, Invoiced, Work Order #, Invoice #, Service Advisor, Technician, Mileage In, Mileage Out, Chapter, Service Package, Parts Total, Labor Total, Sublet Total, Remedied, File As, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1 & 2, Email, Source, Plate, Year, Make, Model, Sub model, Engine, VIN, Unit, Color*

Deleted Work summary: Shows a summary of deleted works in the specified date range

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Scheduled, Promised, Deletion Time, Last Modified by, Deletion Note, Type, Work Order #, Invoice #, Service Advisor, Technician, Mileage In, Mileage Out, Chapter, Service Package, Parts Total, Labor Total, Sublet Total, Remedied, File As, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1 & 2, Email, Source, Plate, Year, Make, Model, Sub model, Engine, VIN, Unit, Color*

Estimate List: Shows a list of estimates with the specified date range. Drill down further to show additional details on the estimate.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Created, Last Modified, Estimate#, Service Advisor, Total, Labor Hours, Parts Total, Labor Total, Sublet Total, Parts Cost, Labor Cost, Sublet Cost, GP%, File As, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1 & 2, Email, Source, Plate, Year, Make, Model, Sub model, Engine, VIN, Unit, Color*

Future Work List: Shows a list of future works.

Input Parameters: *Location*

Columns: *Scheduled, Promised, Last Modified, Type, Work Order #, Mileage In, Duration, Note, Total, File As, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1 & 2, Email, Source, Plate, Year, Make, Model, Sub model, Engine, VIN, Unit, Color*

Invoice Summary: Shows a summary of parts and labor break downs for invoices in the specified date range. Drill down further to show additional details on the invoices.

Input Parameters: *Date Range, Start Date, End Date, Location, Tax 1, Tax 2*

Columns: *Scheduled, Promised, Invoiced, Type, Work Order #, Invoice #, Service Advisor, Technician, Mileage In, Mileage Out, Total, Parts Total, Labor Total, Sublet Total, Parts Discount, Labor Discount, Sublet Discount, Parts Cost, Labor Cost, Sublet Cost, GP%, Labor Hours, Labor Hours Credit, Other Charge, Taxes All, Tax 1, Tax 2, MOP, File As, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1 & 2, Email, Source, Plate, Year, Make, Model, Sub Model, Engine, VIN, Unit, Color*

Line item sales by Contact: Shows the list of the line item sales grouped by contact for the specified location in the specified date range.

Input Parameters: *Date Range, Start Date, End Date, Contact Name, Category, Type, Description, Service Category, Location*

Columns: *File As, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone1 & 2, Email, Source, Plate, Year, Make, Model, Sub model, Engine, VIN, Unit, Color, Invoiced, Type, Work Order, Invoice, Service Advisor, Technician, Line Type, Service Category, Service Package, Part Number, Description, Manufacture, Price, Quantity, Total, Discount, Invoiced. Cost, Other Charge Co*

Material Sales: Shows a list of all material sales in the specified date range

Input Parameters: *Date Range, Start Date, End Date, Part Number, Description, Service category, Location*

Columns: *Scheduled, Promised, Invoiced, Work Order #, Invoice #, Service Advisor, Technician, Mileage In, Mileage Out, Invoice Total, Service Package, Part Number, Manufacturer, Description, Code, Size, Grid, Definition, Type, Quantity, Total, Discount, Invoice, Cost, Supplier, Supplier Invoice, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1 & 2, Email, Source, Plate, Year, Make, Model, Sub model, Engine, VIN, Unit, Color*

Material Sales Summary: Show summary of material sales broken down by service category in the specified date range

Input Parameters: *Date Range, Start Date, End Date, Part Number, Manufacturer, Description, Service Category, Location*

Columns: *Part Number, Manufacturer, Description, Code, Size, Definition, Invoices, Credit Invoices, Inventory, Consignment, Supplied, Returned, Total, Discount, Invoiced, Cost*

Service Item Spending: Shows a list of the service item spending broken down by the service item for the specified location in the specified date range. Drill down further to show additional detail on the invoice level.

Input Parameters: *Date Range, Start Date, End Date, Location, Category*

Columns: *File As, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone1 & 2, Email, Source, Plate, Year, Make, Model, Sub model, Engine, VIN, Unit, Color, Invoices, Credit Invoices, Total, Average, Total Use, Average Per, Last Invoiced, Last Invoice #, Last Invoice Total*

Service Package Line Group Previous Period Comparison: Shows a summary of sales grouped by service package line groups.

Input Parameters: *Date Range, Start Date, End date, Location*

Columns: *Name, Invoices, Credit Invoices, Invoiced Lines, Credited Lines, Invoice Quantity, Credited Quantity, Total Invoices, Total Credited Invoices, Parts, Labor, Sublet, Parts Cost, Labor Cost, Sublet Cost, Total ,Discount, Invoiced, Invoices (P) Credit Invoices(P), Invoiced Lines(P), Credited Lines (P), Invoiced Quantity, Credited Quantity , Total Invoices (P)Total Invoices (P), Total Credited In, Parts (P), Labor (P), Sublet (P), Parts Cost(p), Labor Cost (P), Sublet Cost (P), Total (P), Discount (P),Invoiced (P)*

Service Package Line group Previous Year Comparison: Shows a summary of sales grouped by service package line groups. The data is compared with the numbers from the previous year from the specified date range.

Input Parameters: *Date Range, Start Date, End date, Location*

Columns: *Name, Invoices, Credit Invoices, Invoiced Lines, Credited Lines, Invoice Quantity, Credited Quantity, Total Invoices, Total Credited Invoices, Parts, Labor, Sublet, Parts Cost, Labor Cost, Sublet Cost, Total ,Discount, Invoiced, Invoices (LY) Credit Invoices(LY), Invoiced Lines(LY), Credited Lines (LY), Invoiced Quantity, Credited Quantity , Total Invoices (LY)Total Invoices (LY), Total Credited In, Parts (LY), Labor (LY), Sublet (LY), Parts Cost(LY), Labor Cost (LY), Sublet Cost (LY), Total (LY), Discount (LY),Invoiced (LY)*

Service Package Line Group Summary: Shows a summary of sales grouped by service package line groups. Drill down further to show invoice details

Input Parameters: *Date Range, Start Date, End Date*

Columns: *Name, Invoices, Credit Invoices, Invoiced Lines, Credited Lines, Invoiced Quantity, Credited Quantity, Total Invoices, Total Credited Invoice, Parts, Labor, Sublet, Parts Cost, Labor Cost, Sublet Cost, Total, Discount, Invoiced*

Service Package Sales: Shows a list of service package sales for the specified location in the specified date range

Input Parameters: *Date Range, Start Date, End Date, Location, Code, Title, Service Category*

Columns: *Scheduled, Promised, Invoiced, Type, Work Order#, Invoice #, Service Advisor, Technician, Mileage In, Mileage Out, Invoice Total, Code, Service Package, Labor Hours, Parts Total, Labor Total, Sublet Total, Parts Cost, Labor Cost, Sublet Cost, File As, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1 & 2, Email, Source, Plate, Year, Make, Model, Sub model, Engine, VIN, Unit, Color*

Service Package by Service Advisor: Shows a list of service package sales for each service advisor for the specified location in the specified date range.

Input Parameters: *Date Range, Start Date, End Date, Location, Code, Title*

Columns: *Service Advisor, Scheduled, Promised, Invoiced, Type, Invoice, Code, Service Package, Labor Hours, Parts Total, Labor Total, Sublet Total, Parts Cost, Labor Cost, Sublet Cost*

Service Package Sales by Technician Shows a list of service package sales for each technician for the specified location in the specified date range.

Input Parameters: *Date Range, Start Date, End Date, Location, Code, Title*

Columns: *Technician, Scheduled, Promised, Invoiced, Type, Invoice, Code, Service Package, Labor Hours, Parts Total, Labor Total, Sublet Total, Parts Cost, Labor Cost, Sublet Cost*

Work In Progress Summary: Shows a summary of parts and labor break downs for work in progress in the specified date range. Drill down further to show additional details on the invoices.

Input Parameters: *Location, Skip On Hold Check Box*

Columns: *Scheduled, Promised, Last Modified, Type, Workflow Stage, Work Order #, Service Advisor, Technician, Mileage In, Mileage In, Mileage Out*

Tax

Other Charge Invoice List: Shows a list of invoices and the other charge amounts on the invoices

Input Parameters: *Date Range, Start Date, End Date, Payroll Agency*

Columns: *Start Date, End Date, Remittance Date, Description, Amount*

Other Charge Invoice Summary: Shows a summary of other charges/taxes that's collected on invoices

Input Parameters: *Date Range, Start Date, End date, Location*

Columns: *Type, Code, Name, Amount*

Payroll Remittance List: Shows a list of payroll remittances for the payroll agency in the specified date range.

Input Parameters: *Date Range, Start Date, End Date, Payroll Agency*

Columns: *Start Date, End Date, Remittance Date, Description, Amount*

Tax Exemption Contact List: Shows a list of contacts with tax exemptions in the specified date range.

Input Parameters: *Location*

Columns: *File As, Company, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1 & 2, Email, Source, Notes, No Email, No Post Card, Other Charge Co, Other Charge, Exemption Number, Exemption Note*

Tax Line Summary: Shows a summary of tax lines for the tax agency in the specified date range.

Input Parameters: *Date Range, Start Date, End Date, Tax Agency*

Columns: *Code, Tax Line, Amount*

Tax Remittance List: Shows a list of tax remittances for the tax agency in the specified date range.

Input Parameters: *Date Range, Start Date, End Date, Tax Agency*

Columns: *Start Date, End Date, Remittance Date, Description, Amount*

Tax Transaction List: Shows a list of tax transaction for the tax agency in the specified date range.

Input Parameters: *Date Range, Start Date, End Date, Tax Agency*

Columns: *Code, Tax Line, Date, Type, Description, Amount, Filed*

Tax Transaction Summary: Shows a summary of tax agency in the specified date range. Drill down further to show tax transactions.

Input Parameters: *Date Range, Start Date, End Date, Location*

Columns: *Tax Agency, Amount*

Taxable Sales Summary: Shows a summary of taxable parts and labor break downs for invoices in the specified date range. Drill down further to show additional details on the invoices.

Input Parameters: *Date Range, Start Date, End Date, Location, Tax 1, Tax 2, Include Tax Exemption check box*

Columns: Invoiced, Type, Work Order #, Invoice #, Service Advisor, Technician, Invoice Total, Parts, Taxable Parts (1), Taxable Parts (2), Labor, Taxable Labor(1), Taxable Labor(2), Sublet, Taxable Sublet (1), Taxable Sublet (2), Other Charge, Taxable Other Charge (1), Taxable Other Charge (2), Total Taxable (1), Total Taxable (2), Tax Collected(1), Tax Collected(2), Tax Exempted (1), Tax Exempted (2)

ENTERPRISE LOCATION REPORTS

CRM

CRM Email Summary (Enterprise): Shows a summary of CRM emails sent in the Enterprise.

Input Parameters: *Date Range, Start Date, End Date*

Columns: *Location, Type, Count, Sent, Rejected, Read, Unsubscribed.*

CRM Post Card Summary (Enterprise): Shows a summary of CRM Post Cards sent in the Enterprise.

Input Parameters: *Date Range, Start Date, End Date*

Columns: *Location, Type, Count, Sent, Rejected*

CRM Post Card Summary for Billing (Enterprise): Shows a summary of CRM Post Cards sent in the Enterprise based on billing.

Input Parameters: *Date Range, Start Date, End Date*

Columns: *Location, Type, Count, Sent, Rejected, Billable*

Customer Follow Up (Enterprise): Shows a summary of invoices and services on the invoices for the specified locations in the specified date range. Drill Down further for more detail on invoices.

Input Parameters: *Date Range, Start Date, End Date,*

Columns: *Location, Scheduled, Promised, Invoiced, Type, Work Order#, Invoice #, Service Advisor, Technician, Mileage In, Mileage Out, Total , Parts Total, Labor Total, Sublet Total, MOP, Concerns, Inspections, Services, Deferred, File as, Prefix, First, Middle, Last, Street, City, State, Zip, Country, Phone 1 & 2, Email, Method, Source, Plate, Year, Make, Model, Sub model, Engine, VIN, Unit, Color.*

Employee

Service Advisor /Technician

Service Advisor Summary (Enterprise): Shows a summary of invoice details broken down by Service Advisor in the Enterprise in the specified date range. Drill down further to show additional details on line level.

Input Parameters: *Date Range, Start Date, End Date*

Columns: *Location, Name, Invoices, Packages, Hours, Invoiced (P), Discount (P), Cost (P), Invoiced (L), Discount (L), Cost (L), Invoiced (S), Discount (S), Cost(S), Total Invoiced, Total Discount, Total Cost*

Technician Summary (Enterprise): Shows a summary of invoice line details broken down by Technician in the Enterprise in the specified date range. Drill down further to show additional details on line level.

Input Parameters: *Date Range, Start Date, End Date*

Columns: *Location, Name, Invoices, Packages, Hours, Invoiced (P), Discount (P), Cost (P), Invoiced (L), Discount (L), Cost (L), Invoiced (S), Discount (S), Cost(S), Total Invoiced, Total Discount, Total Cost*

Financial

Bank Account Reconciliations (Enterprise): Shows a list of all Bank Account reconciliation in the specified date range.

Input Parameters: *Date Range, Start Date, End Date, Bank Account*

Columns: *Number, Statement Date, From, To, Statement Amount, Ledger Amount, Outstanding*

Bank Account Summary (Enterprise): Shows a summary of bank account values in specified date range. Drill down further to show additional details on the transaction level.

Input Parameters: *Date Range, Start date, End Date*

Columns: *Type, Name, Description, Account #, Opening Balance, Ending Balance, Difference*

Bank Account Transactions (Enterprise): Shows a list of bank account transactions in the specified date range.

Input Parameters: *Date Range, Start Date, End Date, Bank Account*

Columns: *Location, Date, Number, Description, Amount*

Cash Receipts (Enterprise): Shows a list of all cash receipt in the specified date range.

Input Parameters: *Date Range, Start Date, End Date.*

Columns: *Date, Description, Amount, Payment Method, Deposited, Deposited On*

Inventory

Inventory Cost Listing (Enterprise): List the inventory in stock quantities and total cost that matches search criteria for all locations.

Input Parameters: *Part Number, Description, Manufacturer, Size, Code, Service Category*

Columns: *Location, Service category, Part Number, Description, Manufacturer, Size, Code,, Grid, Supplier, High Order, Low Order, Quantity, Cost, Core, Cost Per*

Inventory Cost Report (Enterprise): Shows the inventory in stock quantities and total cost that matches the search criteria for all locations.

Input Parameters: *Part Number, Description, Manufacturer, Size, Code, Service Category*

Columns: *Part Number, Description, Manufacturer, Size, Code, Grid, Supplier, High Order, Low Order, Quantity, Cost. Core, Consignment Co, Consignment Co, Cost Per*

Inventory Cost Summary (Enterprise): Shows the inventory in stock quantities and total costs by Service Category. Drill down further to show inventory materials details.

Input Parameters: *Grid, Service Category*

Columns: *Location, Profit Center, Service Category, Quantity, Cost*

List

Email List (Enterprise): Shows a list of emails within the Enterprise.

Input Parameters: *Show Alternative Check Box*

Columns: *Location, File As, Company, Prefix, First, Middle, Last, Suffix, Rank, Title, Email, Valid*

Payable

Accounts Payable Account Value (Enterprise): Shows a summary of all accounts payable with total as of specified date. Drill down further to show additional details on the transaction level

Input Parameters: *Account#, Account Name, Total*

Column: *Account #, Account Name, Total*

Accounts Payable Aged (Enterprise): Shows a summary of all accounts payable with aged sub totals

Input Parameters: *Accounting Terms*

Columns: *Account #, Account Name, Due in 30, Due in 1-30, Over 0-30, Over 30-60, Over 60-90, Over 90+. Total*

Payable Detailed Listing (Enterprise): Shows a detailed listing of all accounts payable transactions

Input Parameters: *Date Range, Start Date, End Date*

Columns: *Account #, Account Name, Posted, Due, Type, Description, Amount, Outstanding, Over 30 days, Over 60 days, Over 90 days*

Performance

Loyalty

Customer Loyalty (Enterprise): Display the customer counts and percentages broken down in categories of New, Active, Loyal, Inactive, Dead

Input Parameters: *Date, New Customer Interval, Inactive Customer Interval, Dead Customer Interval, Loyal Customer Interval, Loyal Customer Spending, Loyal Customer Invoices*

Columns: *Location, New, Active, Inactive, Loyal, Dead, All, New%, Active%, Inactive%, Loyal%, Dead%*

Reward Card Lift and Shift (Enterprise): Shows a list of card holders with spending on the selected period and for the same period previous.

Input Parameters: *Date Range, Start Date, End Date, Reward Card*

Columns: *Location, Reward Card, Reward Card Number, Reward Card Amount, Visits, Total, Previous Visits, Previous Totals, Last Year Visits, Last Year Total, New, File As, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Phone 1 & 2, Email, Source*

Reward Card Line Item Sales (Enterprise): Shows a list of line item sales with reward card grouped by contact for the specified location within specified date range

Input Parameters: *Date, Range, Start Date, End Date, Contact Name, Type, Description, Service Category*

Columns: *Location, File As, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1 & 2, Source, Model, Sub Model, Engine, VIN, Unit #, Color, Invoiced, Type, Work Order, Invoice, Reward Card, Reward Card #, Reward Amount, Service Advisor, Technician, Line Type, Service category, Service Package, Part Number, Description, Manufacturer, Price, Quantity, Total, Discount, Invoiced, Cost, Other Charge*

Reward Card Transaction List (Enterprise): Shows a list of Reward Card transactions and the invoice information in the specified date range

Input Parameters: *Date Range, Start Date, End date, Reward Card*

Columns: *Location, Invoiced, Type, Work Order #, Invoice #, Service Advisor, Part \$, Labor \$, Sublet \$, Invoice \$, Reward card, Reward Card #, Reward Amount, File As, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone 1, Phone 2*

Receivable

Accounts Receivable Account Value (Enterprise): Shows a summary of all receivable accounts with total as of specified date. Drill down further to show additional details on the transaction level

Input Parameters: *Date*

Columns: *Account #, Account Name, Total*

Accounts Receivable Aged (Enterprise): Shows a summary of all receivable accounts with aged sub totals.

Input Parameters: *Accounting Term*

Columns: *Account #, Account Name, Due in 30, Due in 1-30, Over 0-30, Over 30-60, Over 60-90, Over 90+. Total*

Accounts Receivable Aged Calendar day (Enterprise): Shows a summary of all accounts receivable with aged sub totals. Drill down further to see additional details per at the transaction level.

Input Parameter: *Accounting Term*

Columns: *Account #, Account name, Future, Next Month, Current Month, Last Month, Over 2 Months, Over 2 Months, Over 3 Months, Total*

Receivable Detailed Listing (Enterprise): Shows a detailed listing of all accounts receivable transactions. Drill down further to show additional details on the transaction level.

Input Parameters: *Date Range, Start Date, End Date*

Columns: *Account #, Account Name, Posted, Due, Type, Description, Amount, Outstanding, Over 30 days, Over 60 days, Over 90 days*

Sales

Vital Signs

Vital Signs by Service Advisor (Enterprise): Shows a summary of sales summary broken down by the service advisor in the specified date range. Drill down further to show additional details on the invoice level.

Input Parameters: *Date Range, Start Date, End Date.*

Columns: *Location, Service Advisor, Parts \$, Labor \$, Sublet \$, Labor Mix \$, Parts Cost, Labor Cost, Sublet Cost, GP \$, GP %, Parts GP %, Total, Labor GP %, Sublet GP %*

Vital Signs by Service Category (Enterprise): Shows a summary of sales summary broken down by service categories in the specified date range. Drill down further to show additional details on the invoice level.

Input Parameters: *Date Range, Start Date, End Date.*

Columns: *Location, Profit Center, Service Category, Parts \$, Labor \$, Sublet \$, Labor Mix \$, Parts Cost, Labor Cost, Sublet Cost, GP \$, GP %, Parts GP %, Total, Labor GP %, Sublet GP %, Sales Mix %*

Vital Signs by Technician (Enterprise): Shows a summary of sales summary broken down by the technician in the specified date range. The report can be further drilled down to show additional details on the invoice level.

Input Parameters: *Date Range, Start Date, End Date.*

Columns: *Location Technician, Parts \$, Labor \$, Sublet \$, Labor Mix %, Parts Cost, Labor Cost, Sublet Cost, GP \$, GP %, Parts GP %, Total, Labor GP %, Sublet GP %*

Sales

Future Work Summary (Enterprise): Shows a summary of all future works broken down by interval.

Input Parameters: *Interval*

Columns: *Location, Interval 1, Interval 2, Interval 3, Interval 4, Future, Total*

Invoice Summary (Enterprise): Shows a summary of parts and labor break downs for the invoices in the specified date range. Drill down further to show additional details on the invoices.

Input Parameters: *Date Range, Start Date, End Date, Tax 1, Tax 2*

Columns: *Location, Scheduled, Promised, Invoiced, Type, Invoice #, Service Advisor*

Line Item by Sales by Contact (Enterprise): Shows a list of the line item sales grouped by contact for the Enterprise in the specified date range

Input Parameters: *Date Range, Start Date, End Date, Contact Name, Category, Type, Description, Service Category*

Columns: *Location, Scheduled, Promised, Invoiced, Work Order #, Invoice #, Service Advisor, Technician, Mileage In, Mileage Out, Chapter, Service Package, Parts Total < Labor Total, Sublet Total, Remedied, File As, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone ! & 2, Email, Source, Plate, Year, Make, Model, Sub model, Engine, VIN, Unit, Color*

Material Sales (Enterprise): Shows a list of all material sales in the specified date range

Input Parameters: *Date Range, Start Date, End Date, Part Number, Description, Service Category*

Columns: *Location, Scheduled, Promised, Invoiced, Work Order #, Invoice #, Service Advisor, Technician, Mileage In, Mileage Out, Invoice Total, Service Package, Part Number, Manufacturer, Description, Code, Size, Grid, Definition, Type, Quantity, Total, Discount, Invoice, Cost, Supplier, Supplier Invoice, Prefix, First, Middle, Last, Suffix, Street, City, State, Zip, Country, Phone ! & 2, Email, Source, Plate, Year, Make, Model, Sub model, Engine, VIN, Unit, Color*

Material Sales Count (Enterprise): Shows a count of all material sales for all locations in the specified date range.

Input Parameters: *Date Range, Start Date, End Date, Part Number, Manufacturer, Description, Service Category*

Columns: *Part Number, Manufacturer, Description, Code, Size, Definition*

Material Sales Summary (Enterprise): Shows a summary of all material sales broken down by service category in the specified date range.

Input Parameters: *Date Range, Start Date, End Date, Part Number, Manufacturer, Description, Service Category*

Columns: *Location, Part number, Manufacturer, Description, Code, Size, Definition, Invoices, Credit Invoices, Inventory, Consignment, Supplied, Returned, Total, Discount, Invoiced, Cost*

Sales Comparison (Enterprise): Shows sales as well as last year sale period of all locations in the specified date range

Input Parameters: *Date Range, Start Date, End Date*

Columns: *Location, Parts Total, Parts Cost, Labor Total, Labor Cost, Sublet Total, Sublet Cost, Invoice Total, Invoice Count, Average Invoice, LY Parts Total, LY Parts Cost, LY Labor Total, LY Labor Cost, LY Sublet Total, LY Sublet Cost, LY Invoice Total, LY Invoice Count, LY Average Invoice.*

Sales Summary (Enterprise): Shows a summary of parts and labor break downs for all sales in the specified date range. Drill down further to show additional details for each location.

Input Parameters: *Date Range, Start Date, End Date*

Columns: *Location, Invoices, Credit Invoices, Total, Parts Total, Labor Total, Sublet Total, Parts Discount, Labor Discount, Sublet Discount, Parts Cost, Labor Cost, Sublet Cost, GP%, Labor Hours, Labor Hours Credit, Other Charge, Taxes*

Service Package Sales Summary (Enterprise): Shows a summary of service package sales for the Enterprise in the specified date range

Input Parameters: *Date Range, Start Date, End Date, Code, Title, Service Category*

Columns: *Location, Invoice Count, Credit Invoice Count, Service Package, Credit Package Count, Labor Hours, Parts Total, Labor Total, Sublet Total, Parts Cost, Labor Cost, Sublet Cost*

APPENDIX A:

The defaults for the Loyalty reports are as follows: (see Figure 1)

New Customer Interval	90	Inactive Customer Interval	180	Dead Customer Interval	360
Loyal Customer Interval	365	Loyal Customer Spending	100.00	Loyal Customer Invoices	1

(Figure 1)

- New Customer Interval:** How many customers were added to the system within the last 90 days?
- Inactive Customer Interval:** Customers who have not posted an invoice in the past 180 days.
- Dead Customer Interval:** Customers who have not been in within the past 360 days.
- Loyal Customer Interval & Loyal Customer Spending & Loyal Customer Invoices:** Within the past 365 days the customer had 1 invoice of at least \$100.00

Loyalty reports may also include the following parameters:

- Active:** Customers who have had an invoice posted within the number of days specified.
 - All:** Total Number of Contacts who have ever had an invoice posted in the database.
- (Example: Active + Inactive + Dead = All (100%))

Note: Results are calculated on the **Date** specified, and then backwards from the **number of days** you enter.