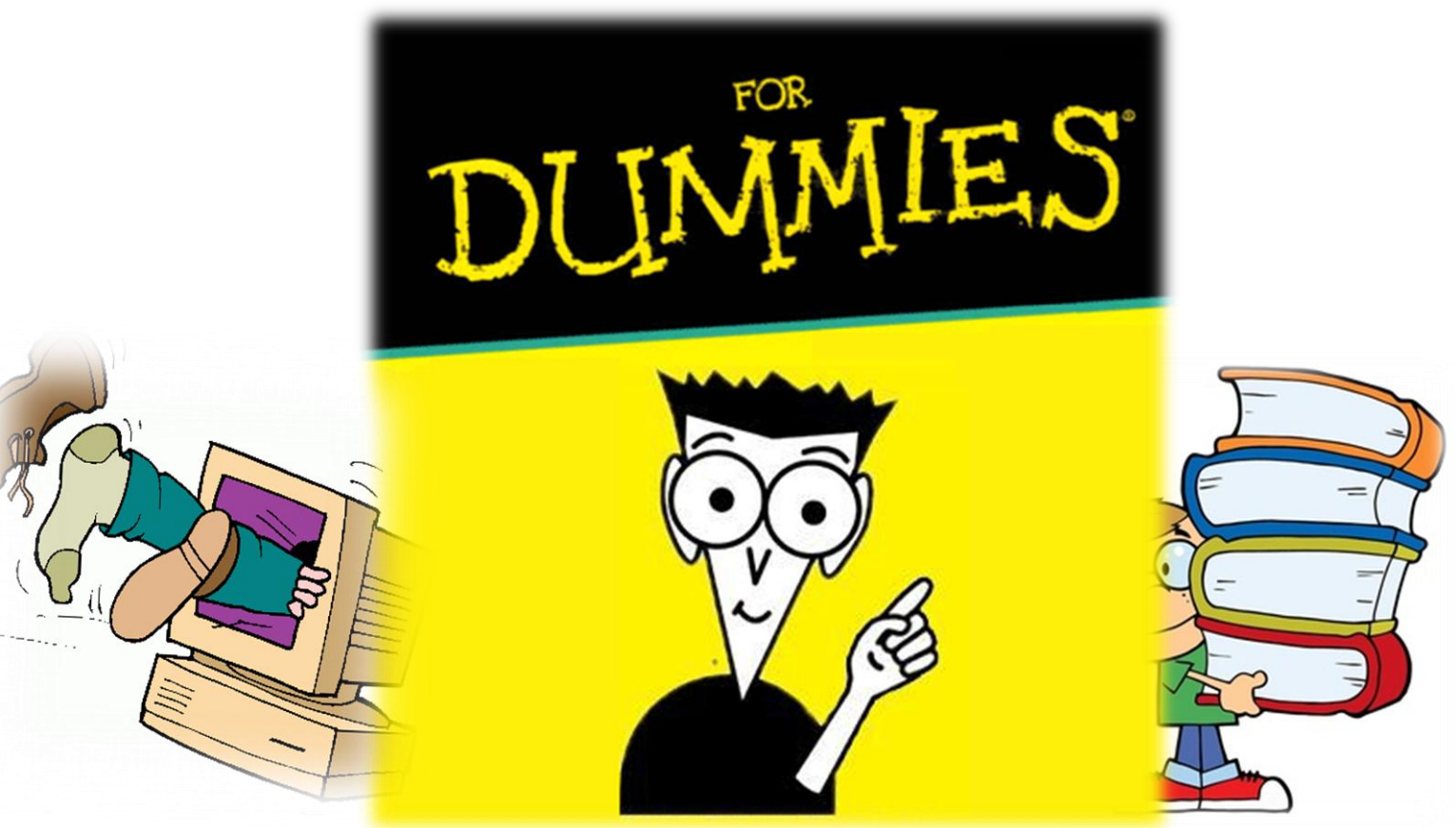


# Step by step procedures in finding reports in the booking system



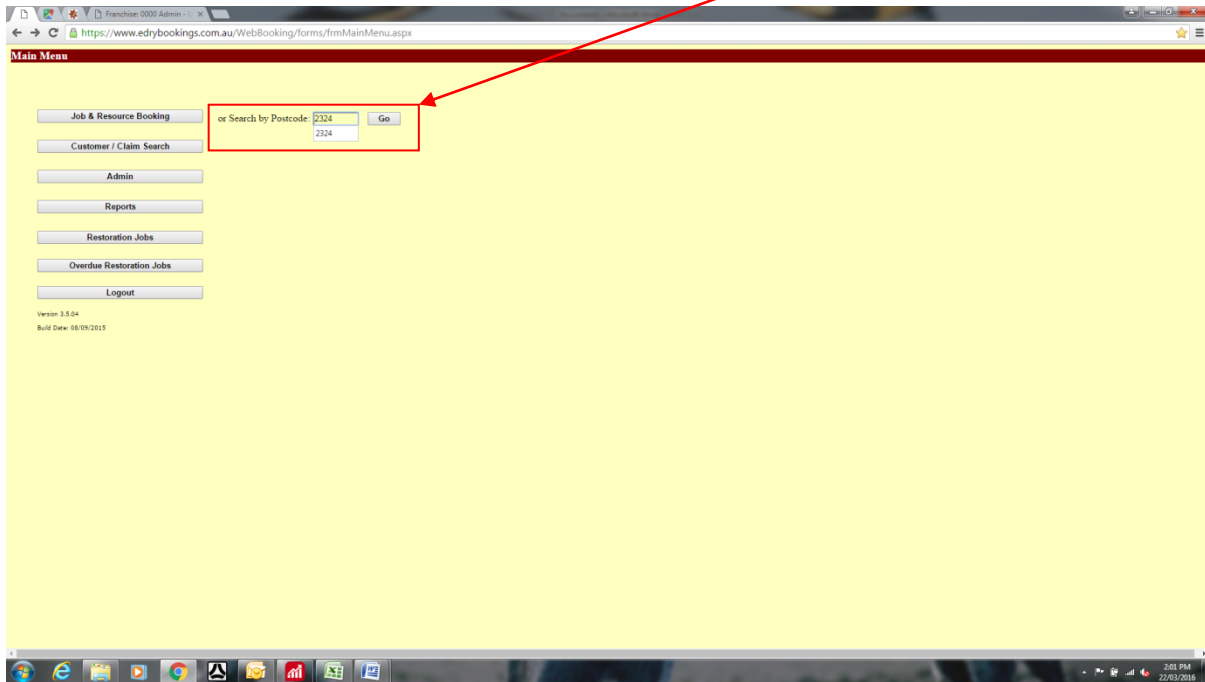
## Index

### Pages

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How to find cancelled appointments	7-10
How to find daily job reports	11-14
How to find weekly job reports	15-18
How to find lead sources reports	19-21

## How to find the turnover product type: Sell Up

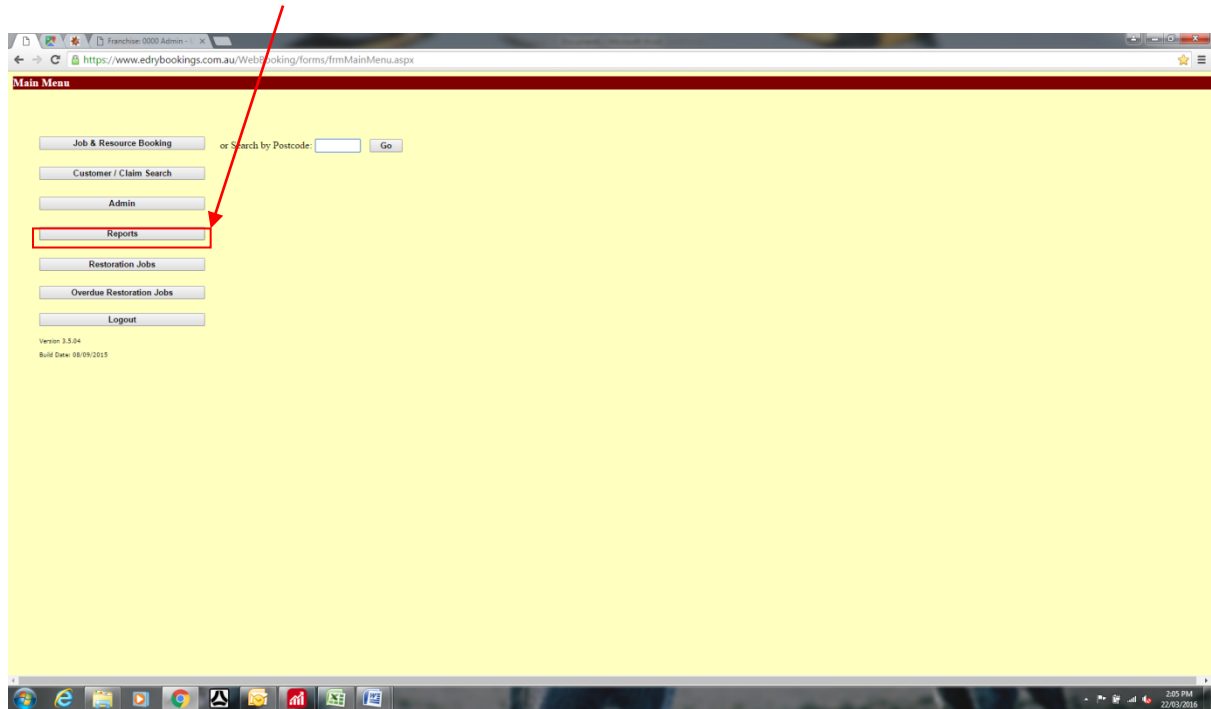
1. Open up booking system to main menu
2. Type in postcode for area tech is working in e.g. 2324 – Newcastle



3. Select 'Close'.



#### 4. Select 'Reports'.



#### 5. Select 'Sellup'.



6. Type in dates of the week you are looking for.
7. Select 'Preview'.



8. Icon will appear bottom of screen visualising document has been downloaded.
9. Select icon and open document.



## 10. Sellup Report will appear.

Sellup Report		Franchise: 0218 - COMPANY/ Newcastle Company	
		Date From: 08/03/2016	Date To: 14/03/2016
Name	Scheduled	Cleaning Type	Amount
<b>CCN1 Joshua 0475964804 M-F 730-330</b>			
<b>Scheduled</b>			
	Admin Fee		0.00
	CC CarpetClean		2,369.00
	Redo		0.00
	O - Ottoman Clean		15.00
	UC UpholsteryClean		432.00
	<b>Total Scheduled</b>		<b>2,816.00</b>
<b>Nonscheduled</b>			
	Credit Card Surcharge		7.36
	NSCC CarpetClean		174.00
	NSCD CarpetDeodorise		70.00
	NSSB E3 SpotBottle		40.00
	<b>Total Nonscheduled</b>		<b>291.36</b>
<b>Sum of Scheduled &amp; Nonscheduled for CCN1 Joshua 0475964804 M-F 730-330:</b>			<b>3,107.36</b>

Here you will be able to scroll through and find the particular Technician you are looking for and be able to visualise the technicians weekly Scheduled Upsell and Non Scheduled Upsell.

## Example:

Sellup Report		Franchise: 0218 - COMPANY/ Newcastle Company	
		Date From: 08/03/2016	Date To: 14/03/2016
Name	Scheduled	Cleaning Type	Amount
<b>CCN1 Joshua 0475964804 M-F 730-330</b>			
<b>Scheduled</b>			
	Admin Fee		0.00
	CC CarpetClean		2,369.00
	Redo		0.00
	O - Ottoman Clean		15.00
	UC UpholsteryClean		432.00
	<b>Total Scheduled</b>		<b>2,816.00</b>
<b>Nonscheduled</b>			
	Credit Card Surcharge		7.36
	NSCC CarpetClean		174.00
	NSCD CarpetDeodorise		70.00
	NSSB E3 SpotBottle		40.00
	<b>Total Nonscheduled</b>		<b>291.36</b>
<b>Sum of Scheduled &amp; Nonscheduled for CCN1 Joshua 0475964804 M-F 730-330:</b>			<b>3,107.36</b>

## How to find Cancelled Appointments

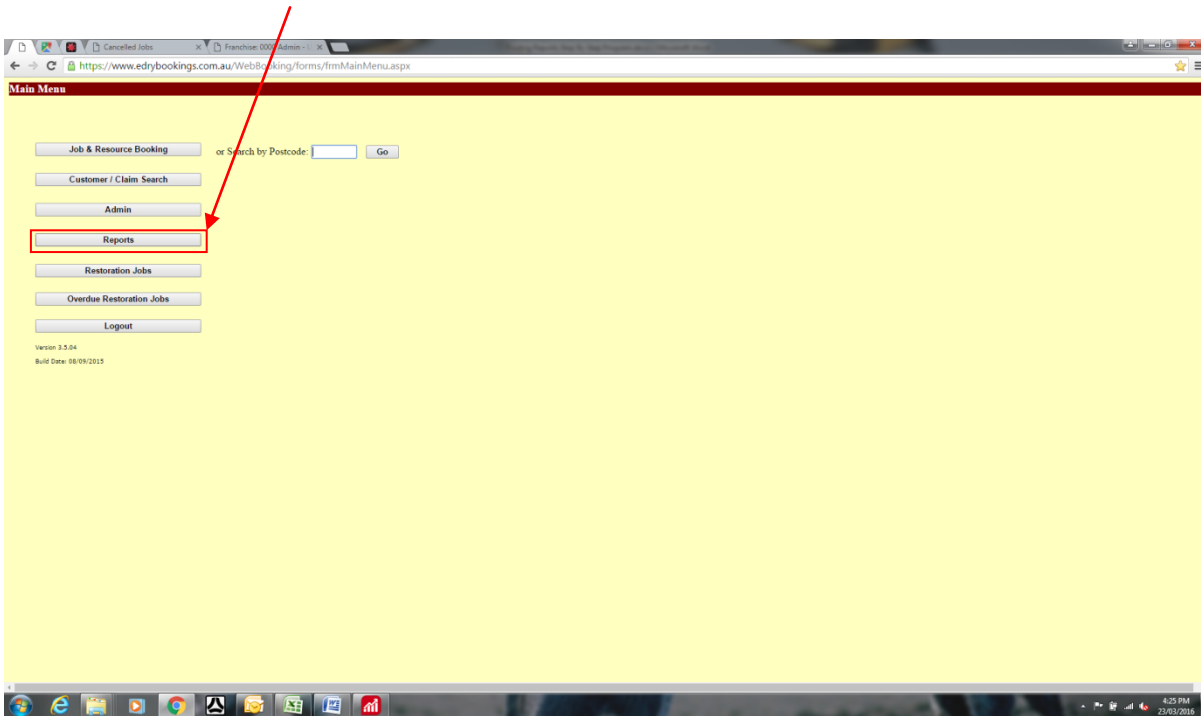
1. Open Main Menu.
2. Type in postcode for area e.g. 2324 = Newcastle.



3. Select 'Close'.



#### 4. Select 'Reports'.



#### 5. Select 'Cancelled Jobs' and Click 'OK'.



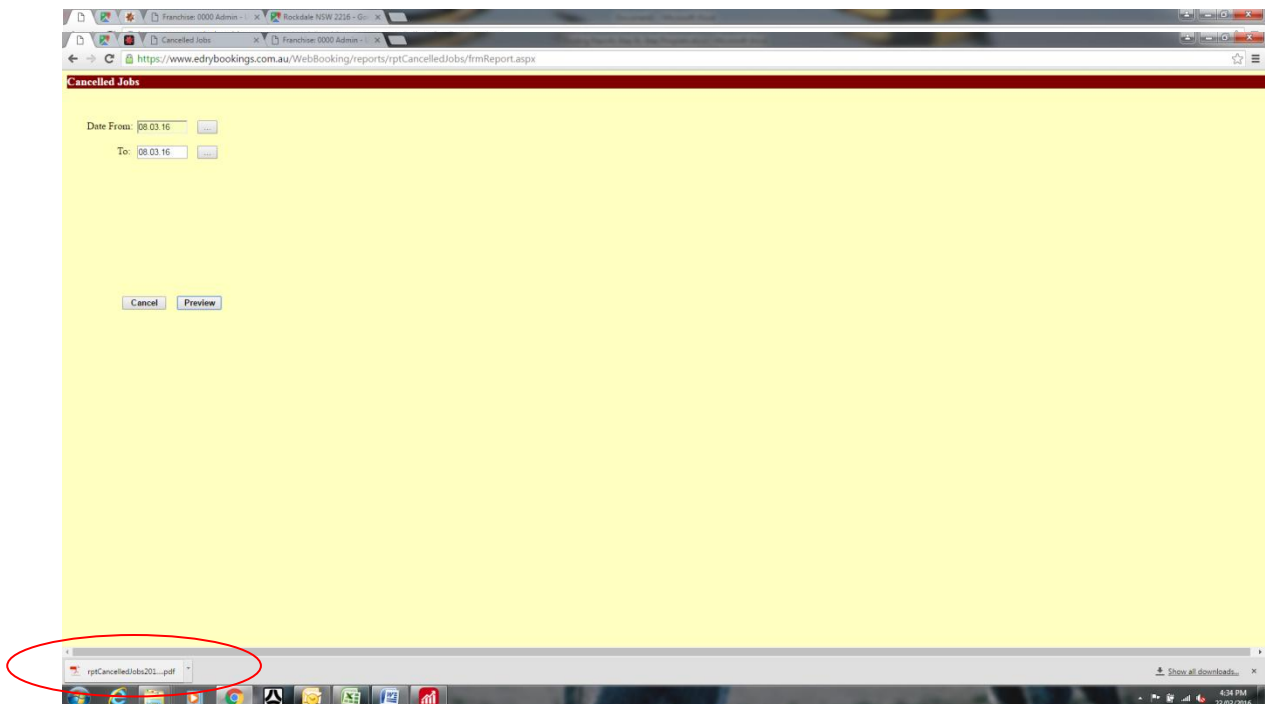


6. Type in the date of the cancelled job/jobs you are looking for  
(e.g. 08.03.16 – 08.03.16 for one day OR 08.03.16 – 11.03.16 for 4 days etc).



7. Icon will appear bottom of screen visualising document has been downloaded.

8. Select icon and open document.



8. A List of cancelled jobs for the day or days will appear.

The list will include:

- The Scheduled Date
- The Date Job was Cancelled
- The customer's name
- The time the job was scheduled
- The price of the job
- The address of the job
- The contact details of the customer
- Who cancelled the job
- Reason the job was cancelled
- The Job Type (C = Carpet Clean, U= Upholstery etc)
- And the lead source of how the customer found us to book with us

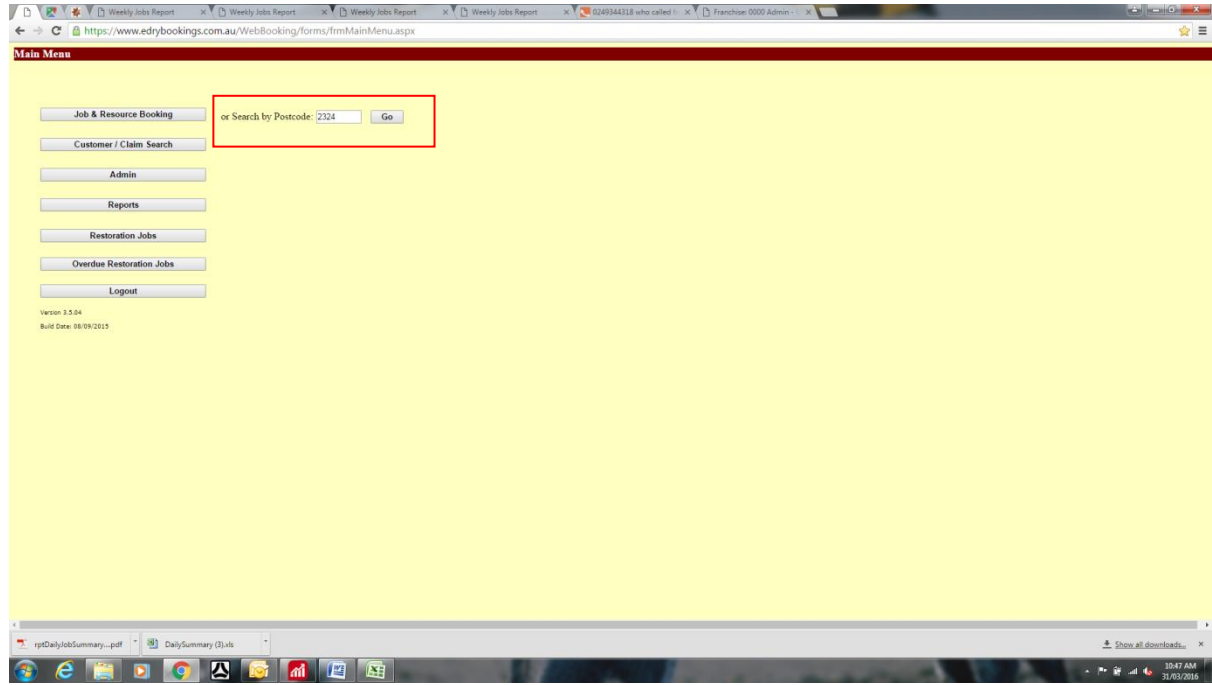
Cancelled Jobs

Date From: 08/03/2016 Date To: 08/03/2016  
Franchise: 0218 - COMPANY/Newcastle Company

<u>Schedule Date</u>	<u>Date Cancelled</u>	<u>Customer</u>	<u>Time Sched</u>	<u>Quoted Price</u>	<u>Street Address</u>	<u>Suburb</u>	<u>Phone</u>	<u>Cancelled By</u>	<u>Reason Cancelled</u>	<u>Job Type</u>	<u>LeadSource</u>
08/03/2016	02/03/2016	Ms Elizabeth Harrison	09:30:00	\$158.00	433 Main Rd	GLENDALE	49543690	Joe Biag	cust called to cancel booking - got someone else to do jjob tomorrow - went to competitor C-41168	CACCSI	Done Before
08/03/2016	06/03/2016	Ms Keira Mahoney	07:30:00	\$189.00	50A Speers St	SPEERS POINT	0421814300	Julie Flores	Julie 6/3 - via VM, canx booking - no one will be there C-41412	C	Done Before
08/03/2016	07/03/2016	Mrs Amy Callaghan	15:30:00	\$134.00	5 Garsdale Ave	ELERMORE VAI	0421575532	Belle Mota	went to competitor C-41513	C	TV Advertisair
08/03/2016	26/02/2016	Ms Kelly Jones	10:30:00	\$119.00	6 McElwee Dr	TINGIRA HEIGHTS	49486305	Anthony Catindig	Been called to work will just call back to rebook. C-40871	C	Brochure
08/03/2016	02/03/2016	Ms Natalie Matthews	07:30:00	\$328.00	5 Iris Close	WOONGARRAH	0403231381	Kat Tan	Kat 02/03 - Cust ci to cancel booking / Went to competitor C-41148	CU	ONL Form St

## How to find Daily Job Reports

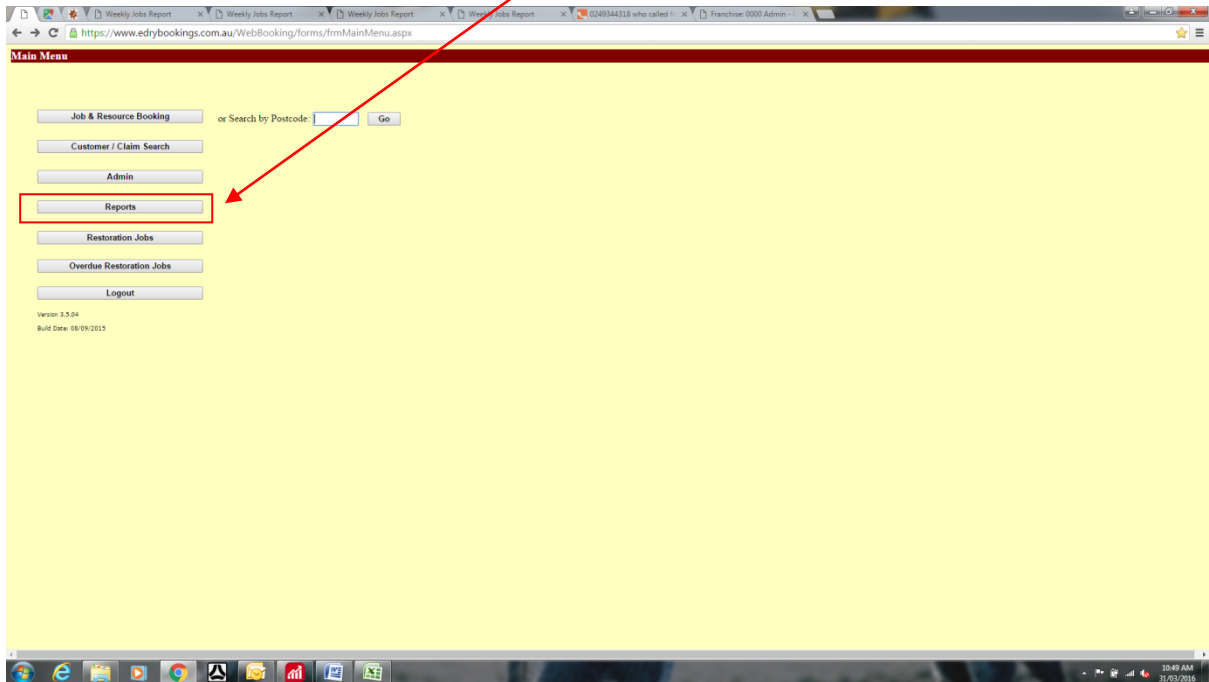
1. Open Main Menu.
2. Type in postcode for area e.g. 2324 = Newcastle



3. Select 'Close'.



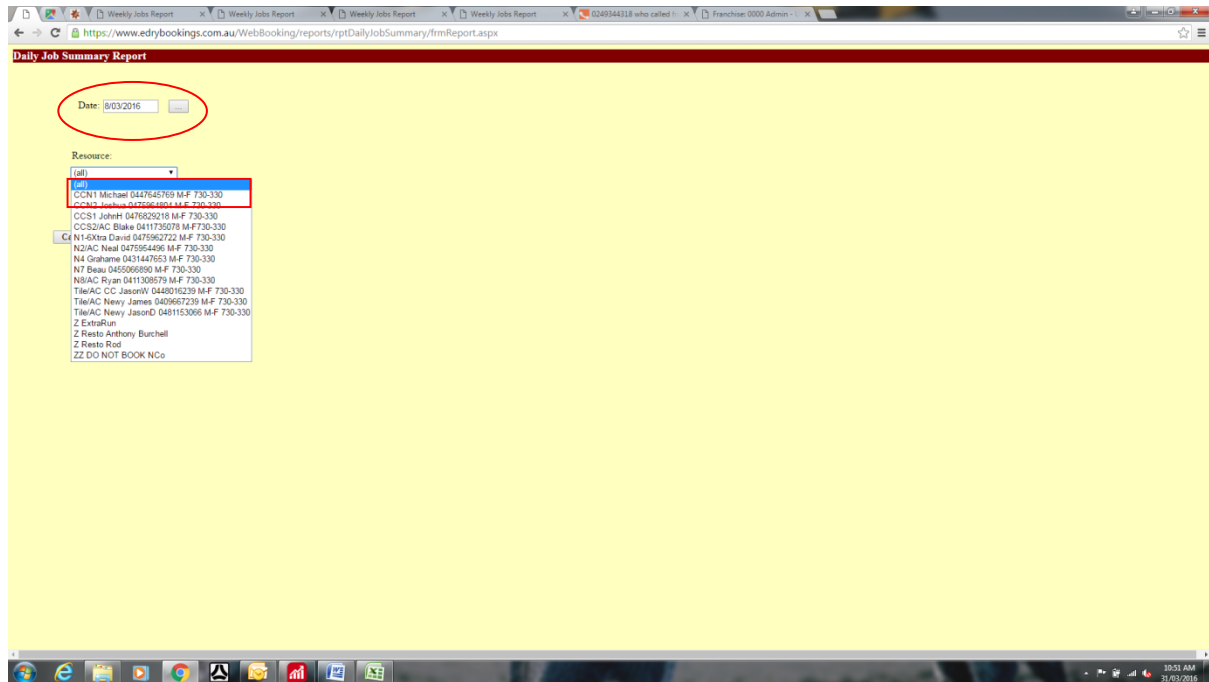
4. Select 'reports'.



5. Select 'Daily Report Summary'.



5. Select 'Date' and 'Technician / Run'.



7. Select 'Preview'.

8. Click on icon and open document.



9. Here you can see each job the technician has done on that particular day.

The list will include:

- The Start time
- The Customers Name/Company Name
- The Address
- The customers contact details
- The Quote Price
- The Lead Source
- The contact details of the customer
- Customer Relevant Comments
- Internal Job Notes
- Any Extra Services
- Cleaning Type (Job Details)
- Total Amount/Cost

file:///C:/Users/boughtonk/Downloads/rptDailyJobSummary201603311052.pdf

Daily Job Summary Report

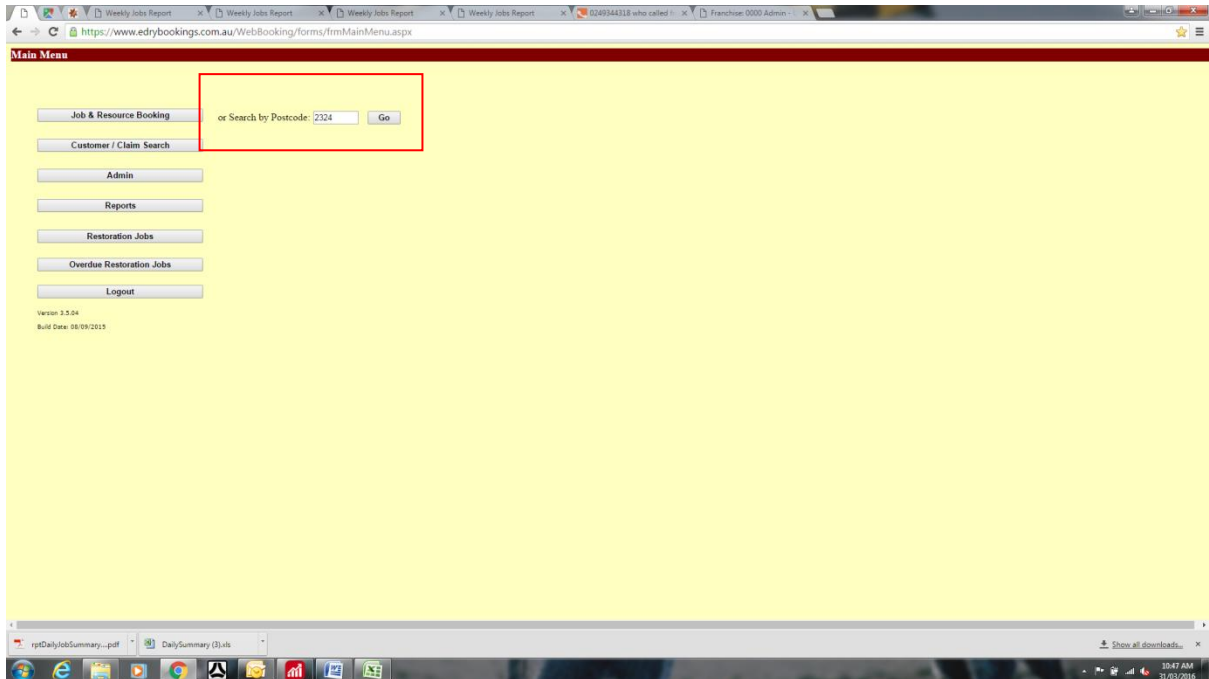
1 / 2

Start Time	Name	Company	Home Phone	Mobile Phone	Work Phone	Quoted Price	Lead Source	Customer Relevant Comments	Internal Job Notes
Franchise: 0218 - COMPANY/ Newcastle Company Schedule Date: 08/03/2016									
N2/AC Neal 0475954496 M-F 730-1330									
09:00:00	Mrs Gail King		49471404	0401406153	49471404	119.00	Shop-A-Docket		1. JB(walkways) H docket 3+1 \$119, they always get the H part of the deal €
	7 Angophora Close MOUNT HUTTON 2290 NSW		Email nr@edry.com.au						June 26/02 - adjusted 30mins earlier, sent sms. Qty Amount 5 119.00
	Contact Name:								
		ExtraService		Cleaning Types					
				CC CarpetClean Lounge=1,Bedroom=1,Hall=1					
10:30:00	Mrs Carol Dagan		49436775	0427436775	0427436775	151.00	Done Before	Discount Reason: customer changed her mind on stairs	traffic marks Irreg - quote & do €
	31 Maria St CHARLESTOWN 2280 NSW		Email nr@edry.com.au						
	Contact Name:								
		ExtraService		Cleaning Types					Qty Amount
				CC CarpetClean Bedroom=1,Stair=15,Rug=1					17 151.00
				NSCC CarpetClean Rug=1					1 20.00
				Discount					1 <50.00
				NSCC CarpetClean					1 80.00
				Credit Card Surcharge					1 3.02
12:00:00	Ms Debra Baker		49721049	0400494511	0400494511	349.00	ONL Form Submit	Discount Reason: only 6 seat lounge	C-41434363855
	34 Makoro Street PELICAN 2281 NSW		Email dragonlady_60@yahoo.com						Ash - tech will wait for 5-10mins more and then ring rod to authorize cancellation of job from run. R/O Trash - R/O cust thought her booking is 5pm, trying to organise someone new to give us access, left vm
	Contact Name:								Qty Amount
		ExtraService		Cleaning Types					
Print Date: 31/03/2016 10:52:21AM									
1									

10:53 AM 31/03/2016

## How to find weekly job reports

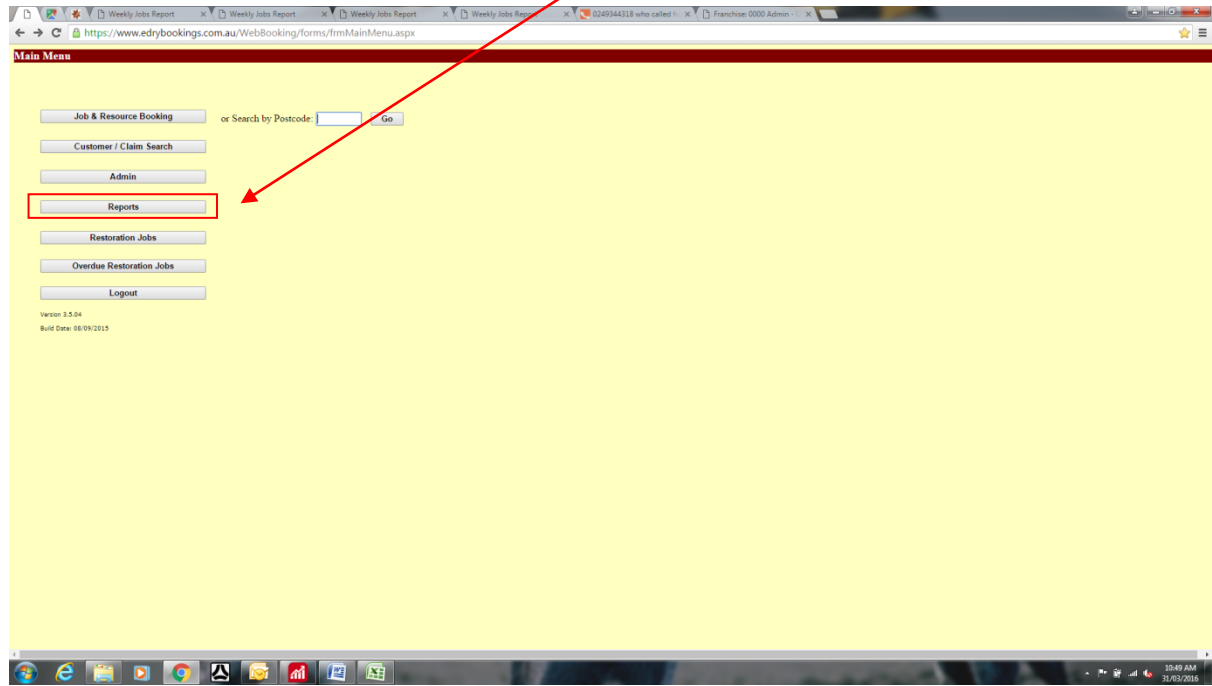
1. Open Booking System
2. Type in postcode for area e.g. Newcastle = 2324



3. Select 'Close'.



4. Select 'Reports'.



5. Select 'Weekly Jobs'.





## 6. Select Date of the week ending e.g. 08.03.16



## 7. Select icon and open document



8. Here you will find the Weekly Summary of Jobs completed the week ending 08.03.16

The Document will include:

- The Technicians Name and Area
- The overall Jobs they have completed that week
- The restoration Income
- The Scheduled Income
- The Sales
- The Total Income
- The Total amount of Jobs completed
- The Average Out
- The Average return
- Cash payments made
- Credit card payments made
- Cheque payments made
- Direct Deposits made
- Accounts (If jobs are being paid by a company)
- Totals of each day
- Any differences noted
- And any expenses noted

Weekly Jobs Report

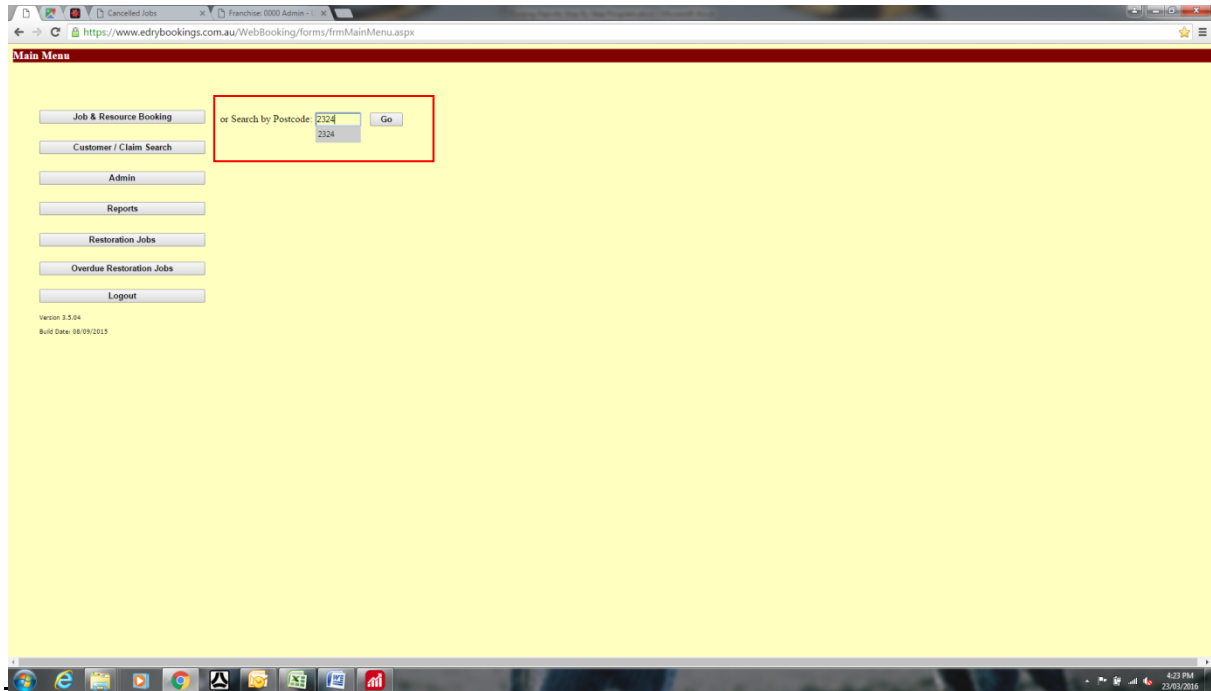
Franchise : 0218 - COMPANY/ Newcastle Company

Date From: 02/03/2016 Date To: 08/03/2016

ScheduleDate	Restoration Income	Sched Income	Sales	Total Income	Total Jobs	Average Out	Average Return	Cash	Credit Card	Cheque	Direct Deposit	Accounts	Total	Diff	Expenses
<b>CCN2 Joshua 047964804 M-P 736-330</b>															
02/03/2016	0.00	611.00	181.75	792.75	4	79.35	102.95	180.00	612.75	0.00	0.00	0.00	792.75	0.00	0.00
04/03/2016	0.00	617.00	36.94	653.94	5	93.48	99.08	523.00	130.94	0.00	0.00	0.00	653.94	0.00	0.00
07/03/2016	0.00	866.00	70.00	936.00	5	127.45	170.18	677.00	0.00	259.00	0.00	0.00	936.00	0.00	0.00
08/03/2016	0.00	602.00	149.55	751.55	6	91.21	113.87	647.00	104.55	0.00	0.00	0.00	751.55	0.00	0.00
<b>CCN2 Joshua 047</b>	<b>0.00</b>	<b>2,696.00</b>	<b>438.24</b>	<b>3,134.24</b>	<b>20</b>	<b>124.80</b>	<b>156.71</b>	<b>2,027.00</b>	<b>808.24</b>	<b>259.00</b>	<b>0.00</b>	<b>0.00</b>	<b>3,134.24</b>	<b>0.00</b>	<b>0.00</b>
<b>CCN1 JohnH 0476829218 M-P 736-330</b>															
02/03/2016	0.00	680.00	358.14	1,038.14	5	123.64	188.75	667.00	371.14	0.00	0.00	0.00	1,038.14	0.00	0.00
03/03/2016	0.00	259.00	230.00	489.00	4	101.64	161.64	0.00	0.00	899.00	0.00	0.00	489.00	0.00	0.00
04/03/2016	0.00	770.00	429.96	1,199.96	3	233.33	363.62	249.00	950.96	0.00	0.00	0.00	1,199.96	0.00	0.00
05/03/2016	0.00	229.00	150.00	409.00	2	117.73	185.91	369.00	40.00	0.00	0.00	0.00	409.00	0.00	0.00
07/03/2016	0.00	640.00	234.81	894.81	4	120.00	162.69	0.00	474.20	582.00	0.00	0.00	1,056.20	-161.39	0.00
08/03/2016	0.00	640.00	261.30	901.30	5	116.36	163.87	169.00	593.30	139.00	0.00	0.00	901.30	0.00	0.00
<b>CCN1 JohnH 0476</b>	<b>0.00</b>	<b>3,569.00</b>	<b>1,764.21</b>	<b>5,333.21</b>	<b>23</b>	<b>155.13</b>	<b>231.84</b>	<b>1,454.00</b>	<b>2,429.60</b>	<b>1,618.00</b>	<b>0.00</b>	<b>0.00</b>	<b>5,493.60</b>	<b>-161.39</b>	<b>0.00</b>
<b>CCN2/AC Blake 0411728078 M-P 736-330</b>															
02/03/2016	0.00	902.00	171.04	1,073.04	5	164.00	195.27	119.00	760.04	194.00	0.00	0.00	1,073.04	0.00	0.00
03/03/2016	0.00	780.00	262.00	1,152.00	5	143.64	209.45	963.00	189.00	0.00	0.00	0.00	1,152.00	0.00	0.00
07/03/2016	0.00	382.00	55.00	437.00	3	115.76	132.42	0.00	253.00	184.00	0.00	0.00	437.00	0.00	0.00
08/03/2016	0.00	612.00	103.28	715.28	5	111.27	130.05	494.00	221.28	0.00	0.00	0.00	715.28	0.00	0.00
<b>CCN2/AC Blake 0</b>	<b>0.00</b>	<b>2,686.00</b>	<b>692.26</b>	<b>3,378.26</b>	<b>18</b>	<b>149.22</b>	<b>187.68</b>	<b>1,576.00</b>	<b>1,424.26</b>	<b>378.00</b>	<b>0.00</b>	<b>0.00</b>	<b>3,378.26</b>	<b>0.00</b>	<b>0.00</b>
<b>NI-Kira David 0475962722 M-P 736-330</b>															
07/03/2016	0.00	636.00	227.39	863.39	4	144.55	196.23	433.00	430.39	0.00	0.00	0.00	863.39	0.00	0.00
08/03/2016	0.00	478.00	70.00	546.00	2	215.45	247.27	544.00	0.00	0.00	0.00	0.00	544.00	0.00	0.00
<b>NI-Kira David 0</b>	<b>0.00</b>	<b>1,114.00</b>	<b>297.39</b>	<b>1,407.39</b>	<b>6</b>	<b>185.00</b>	<b>234.57</b>	<b>977.00</b>	<b>430.39</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>1,407.39</b>	<b>0.00</b>	<b>0.00</b>

## How to find Lead Source Reports

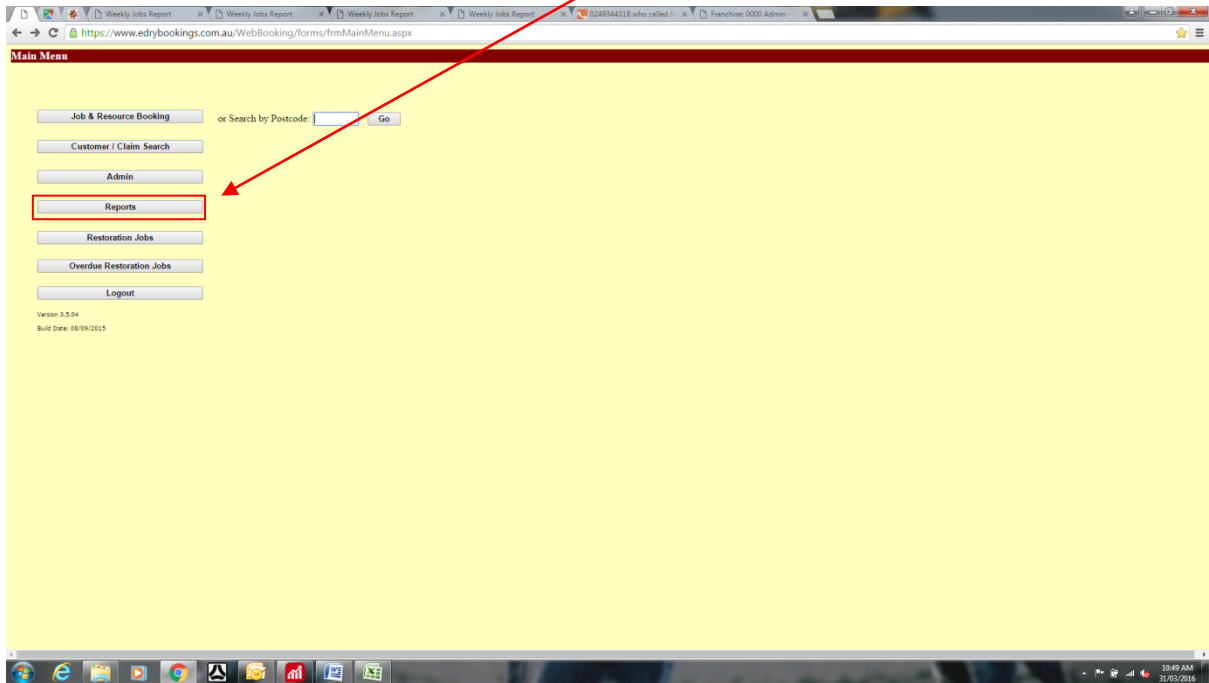
1. Open Booking System
2. Type in postcode for area e.g. Newcastle = 2324



3. Select 'Close'.



4. Select 'Reports'.



5. Select 'Lead Source Summary'.



6. Type in Dates e.g. 08.03.16 – 11.03.16

Summary Totals By Lead Source Report

Date From: 08.03.16 To: 11.03.16

Cancel Preview

7. Here you will find how customers have found Electrodry in the area through different marketing strategies and which marketing strategy is used frequently.

Summary Totals by Lead Source

Franchise: 0218 - COMPANY/ Newcastle Company

Date From: 08/03/2016  
Date To: 11/03/2016

Lead Source	Count
Brochure	26
Done Before	37
Recommendation	3
Website	6
-	1
Quoted Previously	4
Shop-A-Docket	3
TV Advertising	10
Yellow Pages - Book	1
Discount Voucher	1
ONL Form Submit	13
Google	5
Customer Contact Jeff	1
Email Marketing	1



That completes our instructions for dummies!