



Service **Autopilot**<sup>™</sup>

# JOB COSTING

USER GUIDE

V2.7

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## About Job Costing

Job Costing in Service Autopilot is done by first setting up your employees, services, and products, then after completing jobs, running the Job Costing report. The report contains key performance indicator (KPI) data.

Have you heard the saying, “Garbage In, Garbage Out”? The validity of your job costing depends on how well the data is set up. Proper setup will allow the report to show correct data.

This guide walks you through setting up your job costing inputs, including:

- Employees
- Services
- Products
- Jobs
- Job Assignments
- Close Out Day

After that, you can run the prebuilt **Run Reports for Job Costing** (page 11). You can also create your own custom **Create a Custom Job Cost Analysis Report** (page 18).

*“It’s all about the setup.”*

*-- Scott Howard*

# Set Up Employee Total Payroll Burden

Update the following settings for each employee and vendor.

1. Go to **Team > Employees** and click an employee record, then click **Edit**.
2. On the **Edit Employee** screen, click the “Payroll/Job Costing” tab. On the right side of the screen is where the Total Labor Burden Hourly Rate is noted.

*Labor Burden* is the company’s cost for an employee, like Gross Pay + Taxes + Insurance, etc. See “Example: Calculate Labor Burden” below for guidance.

The screenshot shows the 'Edit Employee' interface with the 'Payroll / Job Costing' tab selected. The 'Costing Information' section is highlighted with an orange border and contains the following fields:

| Field                  | Value |
|------------------------|-------|
| Hourly Rate            | 0.00  |
| Hourly Overtime Rate   | 0.00  |
| Vacation Days Per Year | 0     |
| Sick Days Per Year     | 0     |
| Commission Percent     | 0 %   |

Below the 'Costing Information' section is the 'Legacy Payroll' section with the following fields:

| Field                 | Value         |
|-----------------------|---------------|
| Payment Frequency     | [Dropdown]    |
| Last Pay Raise Amount | 0.00          |
| Last Pay Raise Date   | [Date Picker] |

At the bottom of the form are 'Save' and 'Cancel' buttons.

3. In the **Costing Information** section, type the labor burden into the **Hourly Rate** field.

## Example: Calculate Labor Burden

**Labor Burden** is sometimes called **Loaded Labor Rate** and other variations. It means *Gross Hourly rate + Additional labor costs* as shown in the table below.

The following example shows how to calculate your labor burden. Adjust all the factors to apply to your company. You may not have some of the factors below, but use what applies to help you determine how much a resource is costing you.

### Sample Company's Total Financial Contribution for Employee with Annual Totals

|                                |  |
|--------------------------------|--|
| Gross Pay                      | \$28,000 (Gross weekly alone \$13.46 hr.)                  |
| Workman's Comp                 | \$500  |
| Unemployment Insurance         | \$240  |
| Any other Insurances           | \$1,000  |
| Taxes                          | \$550  |
| Bonus                          | \$850  |
| <b>Annual Total</b>            | <b>\$31,140.00</b>   |
| Monthly based on 12 mo.        | \$2,595.00   |
| Weekly based on 52 wks.        | \$598.85   |
| <b>Hourly based on 40 hrs.</b> | <b>\$14.97</b> <i>This is your employee's Labor Burden</i> |

**Note:** If you are unsure of how to calculate the labor burden for each employee, consult an accounting professional.

## Set Up Services for Job Costing

Update the following settings for each service.

1. Go to **Settings > Scheduling > Service** to select a Service in the list.
2. Click the “Job Costing/Analysis” tab, then select either **Target \$/Hr** or **Target \$/Hr with Drive**.

**Target \$/Hr** - the goal per staff hour at the job site (*not* including drive time). It's the revenue the company would need to make to pay all costs and still make a profit. This sometimes depends on the cost of living, competitive rates in the service area, and your marketing practices. A column in the **Job Costing** report will show this field, with an “Over/Under” column to show whether you've met the goal.

**Target \$/Hr with Drive** – This amount is the revenue you need to make minus the cost of resources (on average) during drive time.

Calculate your average drive time for this service, then multiply it by the number of people typically in the vehicle, then multiply that times their average labor burden. Drive Time data can be captured by both mobile apps. If you don't pay resources for drive time, leave this field blank.

If you have tight route density, then the Target \$/Hr with Drive number will be higher. If your route density isn't high, then this number will be lower, based on the labor you have to pay for drive time. A column in the **Job Costing** report will show this field, with an “Over/Under” column to show whether you've met the goal.

**For example:** Your target dollars per staff hour is \$50.00. Your employee's average labor burden is \$15.00 per hour. You estimate an average 10 minutes for drive time between each stop, and there are two employees in the vehicle.

$\$15.00 \times 2 = \$30.00$  Labor Burden

$\$30.00 \times .17$  (10 minutes) = \$5.10 Average Drive Time Labor

$\$50.00 - \$5.10 = \$44.90$  Target Dollars Per Staff Hour with Drive Time

## Set Up Product Costs and Rates to Charge

Services and Products work together in Service Autopilot, but they work separately for Job Costing.

A Service is always required in order to have a Product on a Job.

- **Product Cost** is the company's wholesale cost.
- **Rate** is the retail markup (if applicable). The Cost goes on the Job Costing report.

To set a default Cost (usually an average) at the Product level, follow these steps.

1. Go to **Settings > Scheduling > Products** and select a product from the list.
2. Fill in the fields for the product.
3. Scroll to the **Default B. Cost** field and enter the average budgeted cost, per unit, that you pay for this Product.

**Edit - Mulch Hardwood blk/Yd**

Details Estimates Price Matrix Audit Trail

**Product Details**

|                       |   |
|-----------------------|---|
| Name                  | Mulch Hardwood blk/Yd   |
| Parent Product        | Materials   |
| Tax Code              | Non   |
| Invoice Description   | Black Diamond Hardwood Mulch per Yard   |
| Part Number           |   |
| Default Rate          | 35.00   |
| Default B. Cost       | 23.00   |
| Default B. Hrs        | 0.75  |
| Track Chemicals       | <input type="checkbox"/>  |
| Show in Snow Dispatch | <input type="checkbox"/> <input checked="" type="checkbox"/>                                    |
| Income Account        | Installation Products   |
| COGS Account          | *Cost of Goods Sold<br><i>*This is the default account for products when creating expenses.</i> |
| Class                 | Landscaping Product   |
| Active                | <input checked="" type="checkbox"/>   |

Save Save & New or Cancel

4. Go to a job and add a product to it. In the “Cost” and “Rate” columns, notice that the quantity is a multiplier.

You can change the quantity of the product, then press the **Tab** key to make the quantity field multiply the **Rate**, **B. Hrs**, and **Cost**. This will also show your Margin and Markup percentages for the product.

## Set Up Jobs

- From an account screen, click **Add Job** and fill in the data. Include the Rate (**Job Rate**) and Budgeted Hours (**B. Hrs**).
  - Rate** is the per-visit rate you charge to perform the service
  - B. Hrs.** is the total staff hours you plan to spend on the Job
- If needed, add a product by hovering over the gear icon on the right.
- In the **Qty** field, add the estimated quantity of the product.
- Fill in the rest of the fields. Be sure to fill in the **Cost** field, as it will appear on the **Job Costing** report.

**Installation Service 3Fit (One Time) for Avery, James**

Contract: Not part of a contract | History: No history items found | Upcoming (INSTLL3-FLT): 7/21/2020 Amt: 250.00, INST-1, B.Hrs: 5.00

Create a Work Order?  Yes  No | Is this job complete?  Yes  No

| Service                   | Start Date | Assigned To                  | Qty | Rate   | B. Hrs | Team Size | Days | Start | End |
|---------------------------|------------|------------------------------|-----|--------|--------|-----------|------|-------|-----|
| Installation Service 3Fit | 07/21/2020 | Installation Crew 1 (INST-1) | 1   | 250.00 | 5.00   | 3         |      |       |     |

**Products (1)**

| Product                            | Qty   | Rate  | Total  | B. Hrs | T. B. Hrs | Cost  | T. Cost | Margin | Markup |
|------------------------------------|-------|-------|--------|--------|-----------|-------|---------|--------|--------|
| Materials Match Hardwood tile/Tile | 10.00 | 35.00 | 350.00 | 0.75   | 7.50      | 23.00 | 230.00  | 34.29% | 52.17% |
| <b>Add</b>                         | 10.00 |       | 350.00 | 7.50   |           |       | 230.00  | 34.29% | 52.17% |

**Summary:** Service Total: 250.00, Product Total: 350.00, Subtotal: 600.00, Tax: 23.13, Total: 623.13

- If needed, click the **Options** button and check the **Confirm?** check box. Selecting this box will require reviewing the product quantity on the Dispatch Board after the job is completed. Click **OK**.

**Confirm?**  **OK**

Options:  Invoicing  Create Installed Product

| T. Cost | Margin | Markup |
|---------|--------|--------|
| 230.00  | 34.29% | 52.17% |
| 160.00  | 21.95% | 28.13% |
| 390.00  | 29.73% | 42.31% |

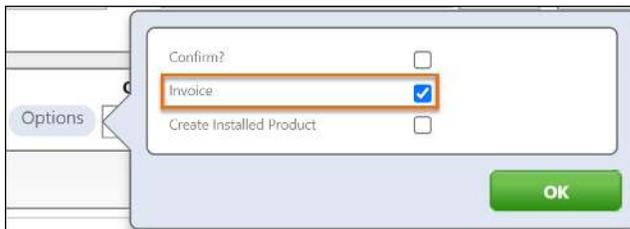
**Summary:** Service Total: 250.00, Product Total: 555.00, Subtotal: 805.00, Tax: 42.09, Total: 847.09

**Note:** Checking the **Confirm** check box will cause the job to display in red on the Dispatch Board after the job is complete. This reminds you to confirm that the quantity matches what you originally estimated.

When checking the quantity on the Dispatch Board, if you need to make a change, go to the **Job Detail** overlay (click the product icon on the far right). 

Then change the estimated quantity to the actual quantity that was used. Correcting this quantity on the job ensures the **Job Costing** report will be accurate in the “Product Cost” column. The report will display the estimated and actual product costs after you make such an update.

6. Choose whether you want the product to appear on the invoice by hovering over **Options** to see the **Invoice** check box.



Checking this makes the product appear as a line item on the invoice, and its dollar amount will also appear in the “Product Revenue” column on the Job Costing Report.

# Dispatch the Jobs

## Verify Team Assignments

If you use Teams with Service Autopilot, before dispatching jobs, be sure to check your Team assignments. If your employees are already assigned to teams as a default, changes here are needed only if there are exceptions to the default team assignments. Any changes you make here apply only to the date on the screen.

This directly affects your labor cost for each job.

1. Go to **Scheduling > Dispatch Jobs**, click the **More** button, then click **Assign Teams**.

**Team Assignment for 07/21/2020**

Date: 07/21/2020

Scheduled Off  Vendors  Employee  Team Leader

**Unassigned**

Installation Crew 1 (INST-1)  
Robert E. Lee (Employee), Kerry Rockard (Employee), Jose R. Gonzalez (Team Leader)

Installation Crew 2 (INST-2)  
David L. Jones (Employee), Joe Smith (Employee), Justin M. Duran (Employee)

Irrigation Crew (IrrigTm1)  
Dennis Brown (Employee), Kayla Hester (Employee)

Maintenance Crew 1 (MC1)  
Scott A. Howard (Employee), Jeff Rogers (Employee)

Maintenance Crew 2 (MC2)  
Anna Taylor (Employee), Greg Smith (Employee)

Maintenance Crew 3 (MC3)  
Juan Sanchez (Employee), Nick Free (Employee)

Update End Times Based on Budgeted Hours and Assignments

2. For the **Date** field, select a different date if needed. By default, the date comes from the current date on the Dispatch Board.
3. Review the team assignments and change as needed.

If you need to reassign any team members, click and drag their name. There is no Save button; any changes are saved automatically.

4. Click the **X** at the top right to exit the screen.
5. Dispatch the Jobs.

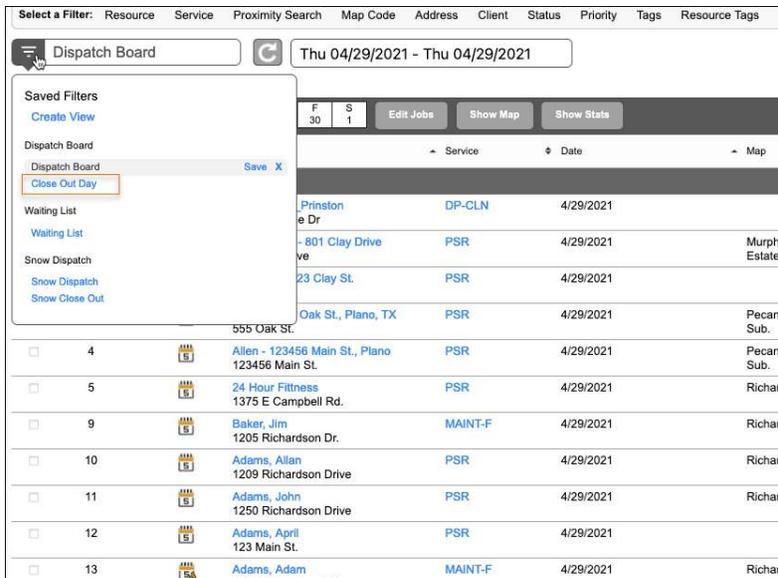
## Track Drive Time

If you track drive time on the Legacy or Team app, then the **Job Costing** report will show the cost of labor for field employees while they are driving.

## Close Out Day

From the **Close Out Day** view of the Dispatch Board, be sure the following fields are filled in correctly. You can find details on doing a Close Out Day in the “*Get Up and Running*” course in the Help Center.

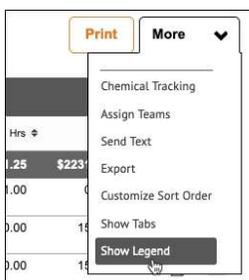
1. From the Dispatch Board, select “Close Out Day” from the dropdown list.



**Note:** Jobs must be completed before they will appear on the **Job Costing** report. They do not have to be invoiced for them to appear. You also can click any of the fields below to edit them manually if needed.

2. Verify that the job is complete.

This is indicated by the icons on the far left of the screen. If the icon is a green check mark  or an Invoice, then it's complete.



**Tip:** To see what the icons mean, you can always click **Legend** on the right side of the screen.



3. Check the rest of the data.

**Hours (Budgeted Hours)** - This should have been added when the job was added to a client. See “Set Up Jobs” on page 6.

**Start and End Times** - Verify that these look correct for the job.

**Job Rate** - This is the per-visit rate you intend to invoice the client.

Additionally, this value is used to calculate the Invoice Amount if the service is set to be billed hourly.

**Actual Job Time** - This is the “Hours” column. It is simply the total actual time the resource was clocked into the job. Additionally, this is used in calculating the Invoice Amount if the service is set to be billed hourly.

**Number of resources on a team** - This is the **Men** column. It’s very important, because this is used to calculate dollars per staff hour on a job. Additionally, this is used in calculating the Invoice Amount if the service is set to be billed hourly.

**Products** - If Products were on the Job, based on options that were chosen, the product quantity may need to be confirmed and/or added to the invoice.

# Run Reports for Job Costing

Still with us? After setting up your data, you can run these reports to evaluate your job costing:

- **Job Costing** report, below
- **Job Cost Summary** report, page 15
- **Cost of Goods Sold** report, page 16
- Custom Analysis: **Job Cost Detail**, page 18

## Job Costing Report

This pre-built SA report lists the labor and material costs of each Visit. Your job cost setup must be complete for the report to be accurate.

The **Job Costing** report is based on these main areas:

- Labor cost
  - Time spent on job site
  - Time spent driving to job site
- **Product cost** (if applicable)

### About this report

The **Job Costing** report is one of the most detailed pre-built reports in the Report Center. Therefore, if setup is not done completely, it can result in inaccurate data for one or more columns.

The **Job Costing** report includes only completed jobs. This report cannot be modified.

1. Go to **Reports > Report Center > SA Reports**
2. Select **Job Costing Report**.



The screenshot shows the 'SA Reports' interface. A search bar at the top contains the text 'job cost'. Below the search bar is a table with three columns: 'SECTION', 'REPORT', and 'DESCRIPTION'. The table lists two reports under the 'Job Costing Reports' section.

| SECTION             | REPORT             | DESCRIPTION  |
|---------------------|--------------------|--|
| Job Costing Reports | Job Cost Summary   | Shows revenue vs. costs to see how profitable each service provided was. |
|                     | Job Costing Report | Shows the material and labor cost of each job.                           |

3. Set the **Start Date** and **End Date**.

Filter By

Start Date:   End Date:

[Refresh](#) [Print](#) [Export to Excel](#)

4. Click **Refresh**.

The Job Costing report looks like this.

SA Report

### Job Costing Report

Filter By

Start Date:  End Date:

[Refresh](#) [Print](#) [Export to Excel](#)

Page 1 of 1

| Client                                | Email                      | Address 1           | Address 2 | Map Code         | City       | State | Postal Code | Date      | Resource(s) | Service                | Bgt Hrs | Bgt Rate | Bgt/Man Hr | Actual Start | Actual Stop | # of Men | Actual Hrs | Actual Time Variance | Actual Rev Rate | Actual Rev Product | Actual Rev Total |
|---------------------------------------|----------------------------|---------------------|-----------|------------------|------------|-------|-------------|-----------|-------------|------------------------|---------|----------|------------|--------------|-------------|----------|------------|----------------------|-----------------|--------------------|------------------|
| Abe's Hdr. - 123 Clay St.             | scott.satraining@gmail.com | 123 Clay St.        |           |                  | Richardson | TX    | 75080       | 4/29/2021 | MC1         | Pooper Scooper Removal | 0.0000  | \$15.00  | \$0.00     |              |             | 2        | 0.0000     | 0.0000               | \$15.00         | \$0.00             | \$15.00          |
| Abe's Hdr. - 801 Clay Drive           | scott.satraining@gmail.com | 801 Clay Drive      |           | Murphy Estates   | Murphy     | TX    | 75094       | 4/29/2021 | MC1         | Pooper Scooper Removal | 0.0000  | \$15.00  | \$0.00     |              |             | 2        | 0.0000     | 0.0000               | \$15.00         | \$0.00             | \$15.00          |
| ACME - 555 Oak St., Plano, TX         | scott.satraining@gmail.com | 555 Oak St.         |           | Pecan Grove Sub. | Plano      | TX    | 75074       | 4/29/2021 | MC1         | Pooper Scooper Removal | 0.0000  | \$15.00  | \$0.00     |              |             | 2        | 0.0000     | 0.0000               | \$15.00         | \$0.00             | \$15.00          |
| Allen - 123456 Main St., Plano        | scott.satraining@gmail.com | 123456 Main St.     |           | Pecan Grove Sub. | Plano      | TX    | 75075       | 4/29/2021 | MC1         | Pooper Scooper Removal | 0.0000  | \$15.00  | \$0.00     |              |             | 2        | 0.0000     | 0.0000               | \$15.00         | \$0.00             | \$15.00          |
| Allen, J. - 7800 Oak St., Prosper, TX | scott.satraining@gmail.com | 7800 Oak Bend Trail |           |                  | Prosper    | TX    | 75078       | 4/29/2021 | MC3         | Pooper Scooper Removal | 0.0000  | \$15.00  | \$0.00     |              |             | 2        | 0.0000     | 0.0000               | \$15.00         | \$0.00             | \$15.00          |
| Anderson, Abe                         | scott.satraining@gmail.com | 720 Fox Run Court   |           | Murphy Estates   | Murphy     | TX    | 75094       | 4/29/2021 | MC2         | Pooper Scooper Removal | 0.0000  | \$15.00  | \$0.00     |              |             | 2        | 0.0000     | 0.0000               | \$15.00         | \$0.00             | \$15.00          |

The columns in this report extend much further to the right than pictured in this screenshot. See below for explanations of some of these columns as well as calculation information, when applicable.

**Note:** For Pro and Pro Plus Members, the data listed below is also used in the Job Cost data set for a Custom Analysis.

## Interpreting the Job Costing Report

The **Job Costing** report includes some Key Performance Indicators (KPI):

- **Actual Time Variance** – a positive number means you came in under the budgeted hours, and a negative number means you went over your budgeted time. You can skim this column to identify problems and successes.
- **Actual Revenue Rate** - the rate invoiced for the service.
- **Actual Revenue Costs** –the sum of what you paid for job time labor, drive time labor (if tracked), and materials, if used.
- **Target Over (Under)** – the difference between the **Actual Rev/Man Hr** (actual revenue per staff hour) and the **Target/Man Hr** (Target dollars per staff hour).
- **Target with Drive Over (Under)** – the difference between the **Drive Effect/Man Hr** and **Target with Drive Over (Under)**.

| Rev<br>a<br>in | Actual<br>Rev/<br>Man Hr | Target<br>/ Man<br>Hr | Target<br>Over<br>(Under) |
|----------------|--------------------------|-----------------------|---------------------------|
|                | \$45.45                  | \$50.00               | (\$4.55)                  |
| 00             | \$216.67                 | \$50.00               | \$166.67                  |
| 0              | \$40.74                  | \$0.00                | \$40.74                   |
| 0.00           | \$417.08                 | \$0.00                | \$417.08                  |
| 9              | \$125.00                 | \$40.00               | \$85.00                   |
|                | \$49.90                  | \$50.00               | (\$0.10)                  |
|                | \$47.62                  | \$50.00               | (\$2.38)                  |

### Job Costing Report Columns

Here are descriptions of the report columns as well as some calculation information.

**Bgt Hrs** – the budgeted hours entered for the Visit. Budgeted hours are the amount of time you expect the job to take regardless of the number of Resources working the job.

**Bgt Rate** – the rate applied to the Visit.

**Bgt/Man Hr** –the budgeted dollars per staff hour: **Bgt Rate** divided by **Bgt Hrs**.

**Actual Start/Stop time** – the start and stop times that were clocked on the Visit (via a mobile app or manually recorded on the Dispatch Board).

**Actual Hrs** – total time spent on a Visit in decimal form (for multiple Resources: the total time worked multiplied by the number of Resources and divided by 60).

**Actual Time Variance** – the difference between **Bgt Hrs** and **Actual Hrs**. A positive number means the job was finished in less than the budgeted hours; and a negative number means that it took longer than the budgeted hours.

**Actual Rev Rate** – the rate invoiced for the Service.

**Actual Rev Product** – the rate invoiced for the Product added to the Service.

**Actual Rev Total** – the combined invoiced rates of the Service and Products (Actual Rev Rate plus Actual Rev Product).

**Direct Cost** – the sum of Expense line items associated to the Visit.

**Actual Rev Costs** – the total of all related costs for the Visit.

**Actual Rev Gross Margin** – Actual Rev Total minus Actual Rev Costs.

**Actual Rev/Man Hr** – Actual Rev Rate divided by Actual Hrs.

**Target/Man Hr** – targeted dollars per staff hour; the target hourly rate you want to earn in order to be profitable on a Service. This number is pulled from the information entered on the Service level (**Settings > Services > Edit > Job Costing Tab**).

**Target Over (Under)** – the difference, either over or under, when Actual Rev/Man Hr is subtracted from the Target/Man Hr.

**Drive Effect Hrs** – the total time spent in drive time between Visits in decimals.

**Drive Effect Cost** – labor costs accrued during Drive Effect Hrs. This is based on the information on the "Payroll/Job Costing" tab and section of the edit overlay for each Resource.

**Drive Effect % of Rev** – how much of the total revenue does this cost make up. Drive Effect Cost divided by Actual Rev Rate.

**Drive Effect Gross Margin** – Actual Rev/Man Hr minus Drive Effect Cost.

**Drive Effect/Man Hr** – drive effect dollars per staff hour. Drive Effect Cost divided by Drive Effect Hrs.

**Target with Drive/Man Hr** – the target amount you want to earn on a Service to be profitable when accounting for drive time and cost. This number is formulated based on the information on the "Job Costing" tab of the Service (**Settings > Service > Edit > Job Costing/Analysis**).

**Target with Drive Over (Under)** – difference between Actual Rev/Man Hr and Target/Man Hr with Drive Effect Cost.

**Labor Cost Avg Cost/Man** – Labor Cost divided by the number of Resources clocked into the job.

**Labor Cost** – average cost per Resource multiplied by number of Resources on the job.

**Labor Cost % of Rev** – percentage of the total revenue that the Labor Cost makes up. Labor Cost divided by Actual Rev Rate.

**Labor Cost Gross Margin** – Labor Cost minus the Actual Rev Rate.

**Products Bgt Cost** – the total budgeted cost of the Products associated to the Service. This number is entered on the Product level.

**Products Actual Cost** – the actual cost of the Products used on the Service.

**Products % of Rev** – the percentage of total revenue the Products revenue accounts for.

**Products Gross Margin** – Actual Rev Product minus Product Actual Cost.

## Job Cost Summary Report

This pre-built SA report shows revenue versus costs to see how profitable each service provided was.

| Client Name      | Client Address                        | Date       | Service               | Actual Rev Total | Bgt / Man Hr | Actual Rev / Man Hr | Actual Time Variance | Target Over (Under) | Products Actual Cost | Labor Cost | Drive Effect Cost |
|------------------|---------------------------------------|------------|-----------------------|------------------|--------------|---------------------|----------------------|---------------------|----------------------|------------|-------------------|
| 1234 Golden Lane | 1234 Golden Lane Irving, TX 75062     | 2/26/2020  | Bed Maintenance       | \$500.00         | \$0.00       | \$0.00              | 0.00                 | \$0.00              | \$0.00               | \$0.00     | \$0.00            |
| 2324 Felicia Dr  | 2324 Felicia Dr Plano, TX 75074       | 11/25/2019 | Snow Plow             | \$80.00          | \$266.67     | \$0.00              | 0.30                 | \$0.00              | \$0.00               | \$0.00     | \$0.00            |
| A.J. Green       | 22 Eisenhower Drive Frisco, TX 4055   | 9/14/2018  | Fall Clean Up         | \$230.00         | \$71.11      | \$0.00              | 4.50                 | \$0.00              | \$0.00               | \$0.00     | \$0.00            |
| A.J. Green       | 22 Eisenhower Drive Frisco, TX 4055   | 9/14/2018  | Gratuity              | \$130.00         | \$0.00       | \$0.00              | 0.00                 | \$0.00              | \$0.00               | \$0.00     | \$0.00            |
| A.J. Green       | 22 Eisenhower Drive Frisco, TX 4055   | 9/20/2018  | Bed Maintenance       | \$0.00           | \$0.00       | \$0.00              | 0.00                 | \$0.00              | \$0.00               | \$0.00     | \$0.00            |
| A.J. Green       | 22 Eisenhower Drive Frisco, TX 4055   | 9/5/2019   | Lawn Mowing           | \$32.00          | \$0.00       | \$0.00              | 0.00                 | \$0.00              | \$0.00               | \$0.00     | \$0.00            |
| A.J. Green       | 22 Eisenhower Drive Frisco, TX 4055   | 9/11/2019  | Lawn Mowing           | \$32.00          | \$0.00       | \$0.00              | 0.00                 | \$0.00              | \$0.00               | \$0.00     | \$0.00            |
| Aaron Rodgers    | 3409 Singletree Trail Plano, TX 75023 | 11/25/2019 | Snow Plow             | \$60.00          | \$200.00     | \$0.00              | 0.30                 | \$0.00              | \$0.00               | \$0.00     | \$0.00            |
| Adam Thielen     | 3321 Cross Bend Rd Plano, TX 75023    | 11/25/2019 | Snow Plow             | \$60.00          | \$300.00     | \$0.00              | 0.20                 | \$0.00              | \$0.00               | \$0.00     | \$0.00            |
| Adamson, Adam    | 8325 Glen Regal Dr Dallas, TX 75243   | 8/6/2018   | Lawn Mowing           | \$0.00           | \$0.00       | \$0.00              | 0.00                 | \$0.00              | \$0.00               | \$0.00     | \$0.00            |
| Adamson, Adam    | 8325 Glen Regal Dr Dallas, TX 75243   | 11/1/2018  | Lawn Care Maintenance | \$50.00          | \$0.00       | \$0.00              | 0.00                 | \$0.00              | \$0.00               | \$0.00     | \$0.00            |
| Alex Collins     | 3924 Mission Ridge Rd Plano, TX 75023 | 9/24/2018  | Bed Maintenance       | \$90.20          | \$10.00      | \$10.00             | -3.02                | \$10.00             | \$0.00               | \$0.00     | \$0.00            |
| Alex Collins     | 3924 Mission Ridge Rd Plano, TX 75023 | 10/4/2018  | Bed Maintenance       | \$0.01           | \$0.00       | \$0.00              | 0.00                 | \$0.00              | \$0.00               | \$0.00     | \$0.00            |
| Alex Collins     | 3924 Mission Ridge Rd Plano, TX 75023 | 9/5/2019   | Lawn Mowing           | \$28.00          | \$0.00       | \$0.00              | 0.00                 | \$0.00              | \$0.00               | \$0.00     | \$0.00            |
| Alex Collins     | 3924 Mission Ridge Rd Plano, TX 75023 | 11/25/2019 | Snow Plow             | \$63.00          | \$196.97     | \$0.00              | 0.33                 | \$0.00              | \$0.00               | \$0.00     | \$0.00            |
| Alex Collins     | 3924 Mission Ridge Rd Plano, TX 75023 | 3/12/2020  | Lawn Mowing           | \$64.00          | \$0.00       | \$0.00              | 0.00                 | \$0.00              | \$12.36              | \$0.00     | \$0.00            |
| Alli LeDar       | 19 Letitia Lane S. Garland, TX 4077   | 9/24/2019  | Bed Maintenance       | \$0.00           | \$0.00       | \$0.00              | -0.02                | \$0.00              | \$0.00               | \$0.35     | \$0.00            |

While not as detailed as the **Job Costing** report, this report still provides a lot of useful information about budgeted versus actual costs at a glance. Many of the columns are calculated the same way as the Job Costing report.

### Fields

**Actual Rev Total** - the invoiced rate for both the Service and any Products attached to the Service.

**Bgt/Man Hr** - the rate entered on the job level divided by the budgeted hours.

**Actual Rev/Man Hr** - the invoiced rate for the service divided by the actual time spent on the job. This column will also have red and green arrows. These arrows indicate whether or not the Service was profitable.

**Actual Time Variance** - the difference between budgeted and actual hours.

**Target Over (Under)** - the difference between the actual dollars per staff hour earned and the target dollars per staff hour desired (entered on the Service level).

**Products Actual Cost** - the actual cost of the Products used on the Service (as opposed to what was initially assigned to the job).

**Labor Cost** - the average cost per Resource times the number of Resources on the job.

**Drive Effect Cost** - the labor costs accrued during drive time.

## Cost of Goods Sold Report

This pre-built SA report shows revenue and cost by Service in a defined time frame, based on each Visit. This report can be filtered by Date and Service. Additionally, you can include completed jobs or filter out jobs without recorded times or amounts.

**SA Report**

**Cost of Goods Sold**

Filter By: Start Date: 8/1/2018 End Date: 8/26/2020 Service: Select options Use Completed Jobs  Filter Out Jobs with No Job Time  Filter Out Jobs with No Amount

Refresh Print Export to Excel

| Name                          | Cost           | B.Hrs        | A.Hrs        | Gross Sales        | Labor Cost      | Materials         | Direct Cost   | Gross Profit      | C/M/H           | C/M/EM          | A\$/M/H           |
|-------------------------------|----------------|--------------|--------------|--------------------|-----------------|-------------------|---------------|-------------------|-----------------|-----------------|-------------------|
| 21" Mower                     | 0.00%          | 0.00         | 0.00         | \$7.00             | \$0.00          | \$0.00            | \$0.00        | \$7.00            | \$0.00          | \$0.00          | \$0.00            |
| Air Quality Inspection        | 0.00%          | 0.00         | 0.00         | \$248.00           | \$0.00          | \$0.00            | \$0.00        | \$248.00          | \$0.00          | \$0.00          | \$0.00            |
| Bed Maintenance               | 10.38%         | 6.90         | 6.92         | \$1,305.24         | \$110.75        | \$24.72           | \$0.00        | \$1,170.07        | \$16.01         | \$19.59         | \$188.75          |
| Commercial Maintenance        | 0.00%          | 0.00         | 0.00         | \$98.88            | \$0.00          | \$0.00            | \$0.00        | \$98.88           | \$0.00          | \$0.00          | \$0.00            |
| Early Spring Application      | 0.00%          | 0.00         | 0.00         | \$56.00            | \$0.00          | \$0.00            | \$0.00        | \$56.00           | \$0.00          | \$0.00          | \$0.00            |
| Early Winter Application      | 0.00%          | 0.00         | 0.00         | \$300.00           | \$0.00          | \$0.00            | \$0.00        | \$300.00          | \$0.00          | \$0.00          | \$0.00            |
| Edging                        | 0.00%          | 0.00         | 0.00         | \$44.00            | \$0.00          | \$0.00            | \$0.00        | \$44.00           | \$0.00          | \$0.00          | \$0.00            |
| Fall Application              | 0.00%          | 0.00         | 0.00         | \$300.00           | \$0.00          | \$0.00            | \$0.00        | \$300.00          | \$0.00          | \$0.00          | \$0.00            |
| Fall Clean Up                 | 1.02%          | 4.50         | 0.12         | \$230.00           | \$2.34          | \$0.00            | \$0.00        | \$227.66          | \$20.09         | \$20.09         | \$1,971.47        |
| Flower Bed Weed Control       | 90.91%         | 0.00         | 0.00         | \$55.00            | \$0.00          | \$50.00           | \$0.00        | \$5.00            | \$0.00          | \$0.00          | \$0.00            |
| Flower Installation           | 76.61%         | 9.00         | 13.00        | \$1,500.00         | \$240.44        | \$908.50          | \$0.00        | \$350.86          | \$14.04         | \$76.61         | \$100.00          |
| Grubbing                      | 0.00%          | 0.00         | 0.00         | \$15.00            | \$0.00          | \$0.00            | \$0.00        | \$15.00           | \$0.00          | \$0.00          | \$0.00            |
| Landscape Maintenance         | 0.00%          | 0.00         | 0.00         | \$1,000.00         | \$0.00          | \$0.00            | \$0.00        | \$1,000.00        | \$0.00          | \$0.00          | \$0.00            |
| Lawn Care Maintenance         | 2.54%          | 1.20         | 2.47         | \$2,128.00         | \$41.74         | \$12.36           | \$0.00        | \$2,073.90        | \$16.92         | \$21.93         | \$862.70          |
| Lawn Mowing                   | 11.82%         | 3.22         | 10.00        | \$3,254.32         | \$149.40        | \$247.52          | \$0.00        | \$2,957.40        | \$14.87         | \$39.49         | \$323.76          |
| Leaf Cleanup                  | 3.62%          | 2.00         | 0.00         | \$20.00            | \$0.00          | \$1.08            | \$0.00        | \$28.91           | \$0.00          | \$0.00          | \$0.00            |
| Monthly Maintenance Agreement | 0.00%          | 0.00         | 0.00         | \$0.00             | \$0.00          | \$15.00           | \$0.00        | (\$15.00)         | \$0.00          | \$0.00          | \$0.00            |
| Poop Scoop (2/week)           | 0.00%          | 0.00         | 0.00         | \$68.95            | \$0.00          | \$0.00            | \$0.00        | \$68.95           | \$0.00          | \$0.00          | \$0.00            |
| Poop Scoop (3/week)           | 1.45%          | 0.00         | 0.33         | \$475.20           | \$6.91          | \$0.00            | \$0.00        | \$468.29          | \$20.74         | \$20.74         | \$1,426.50        |
| System Check                  | 11.50%         | 0.00         | 0.00         | \$100.00           | \$0.00          | \$11.50           | \$0.00        | \$88.50           | \$0.00          | \$0.00          | \$0.00            |
| <b>Totals</b>                 | <b>209.68%</b> | <b>28.82</b> | <b>34.88</b> | <b>\$11,316.19</b> | <b>\$551.78</b> | <b>\$2,370.69</b> | <b>\$0.00</b> | <b>\$9,493.72</b> | <b>\$104.67</b> | <b>\$198.43</b> | <b>\$4,883.20</b> |

*Cost* This number tells you how much you make per \$ sold for this service. For example, if your cost of revenue for a particular service (the Cost) is 72%, that means you make 28 cents per \$ of work performed. This is before recovering indirect costs, overhead, earning profit, etc.

*B. Hrs Budgeted Hours* (estimated amount of time to perform the job and/or amount of time sold that was used to calculate the rate)

*A. Hrs Actual Hours* (the actual hours incurred performing the job)

*Gross Sales* Gross revenue generated for this service for the specified date range. Based on Invoiced jobs.

This report includes a number of calculations and has reference information for most columns at the bottom of the report.

### Fields

**Name** - the Service name. This report is categorized by Service name regardless of the number of times that Service was completed within the specified date range.

**Cost** - the percentage of revenue for a particular Service that accounts for labor costs (before indirect costs, overhead, etc.). If the cost is 10% then 90% of your revenue is profit (90 cents on the dollar).

**B. Hrs** - the total amount of time a job is anticipated to take regardless of the number of Resources that will be working the job.

**A. Hrs** - the hours incurred while performing the job.

**Gross Sales** - the gross revenue generated for the Service for the specified date range. This is based on the invoiced amount for the Service (excluding Products).

**Labor Cost** - Estimated cost of labor, based on the employee's Hourly Rate on the Employee Settings screen. If the Burden is included on that screen, then burden is included on the estimate. Otherwise, the burden is not included. Overtime is not considered. This number is an estimate as not all labor costs can be tracked in SA.

**Materials** - the cost of Products attached to the Visit. This number is based off the "Cost Per" field on the Product level and the amount of Product Invoiced for the Service.

**Direct Cost** - Expenses that are billed to the job. These are usually only used for things like equipment rental or subcontractors.

**Gross Profit**- Gross Sales minus Labor Cost and Materials.

**C/M. Hr** - the cost per staff hour. The cost to perform one staff hour of work for this Service, excluding materials. This number is based on the Cost versus Actual Hours.

**C/M.Hr.M** - the cost per staff hour including materials. The cost to perform one staff hour of work for this Service, including material costs. This number is based on the Cost, Actual Hours, and Materials.

**A.\$/M.Hr** - actual dollars per staff hour. The gross revenue earned per staff hour of performed work.

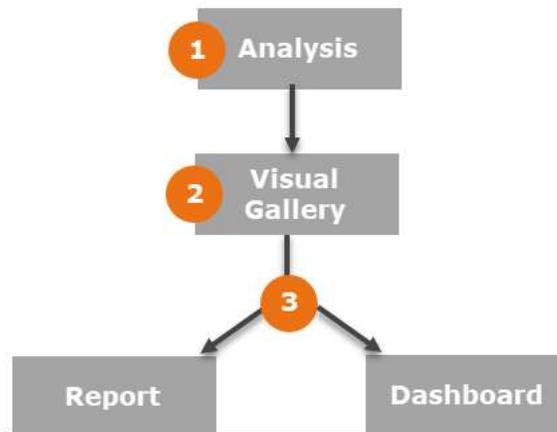
# Create a Custom Job Cost Analysis Report

An analysis is not a report, it is the data you can use for a report. You can add as many analyses as you want to a report, but it might not be efficient to have multiple analyses.

## The Big Picture

Before you can create a custom report or dashboard, you need to first create one or more analyses. The analyses will then be available for various uses.

1. Create an Analysis
2. Add the Analysis to the Visual Gallery
3. From the Visual Gallery, create reports and dashboards



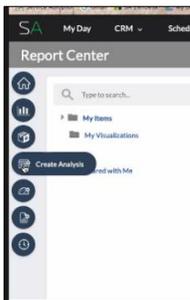
## Create an Analysis

An analysis can consist of any of the following:

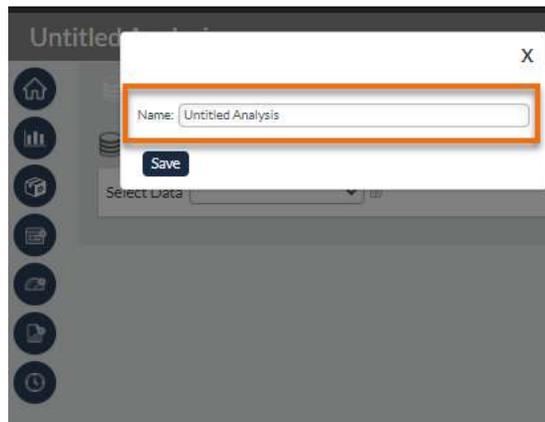
- Table
- Chart
- Crosstab

Follow these steps to create an analysis.

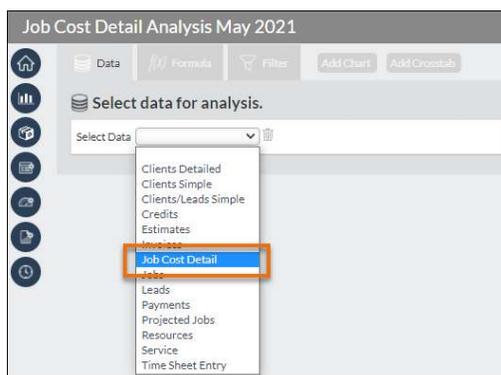
1. Go to **Reports > Report Center** and click **Create Analysis**.



2. Click "Untitled Analysis" at the top and type in a new title, then click **Save**.



3. Choose a data set from the dropdown list, such as **Job Cost Detail**.



4. Select **Data Points** for the Job Cost Detail.

Check the check boxes for the columns to include in your custom analysis.

In the example, there are two data sets. **Job Cost Detail** is the primary data set, and **Job - Client** is the secondary data set. Another term for “data set” is “data table.”

5. Click **OK**.

The table generates, similar to this:

| Assigned Resources | # of Men | Date     | Client Name                 | Service Name            | Budgeted Hours | Budgeted Rate | Budgeted \$/Man Hour | Actual Start Time | Actual Stop Time | Actual Hours | Actual Time Variance | Actual Revenue / Man Hour | Actual Revenue Cost | Actual Revenue Total | Actual Revenue Gross Margin | Labor Cost | Products Budgeted Cost | Products Cost | Target / Man Hour | Target Over (Under) |  |
|--------------------|----------|----------|-----------------------------|-------------------------|----------------|---------------|----------------------|-------------------|------------------|--------------|----------------------|---------------------------|---------------------|----------------------|-----------------------------|------------|------------------------|---------------|-------------------|---------------------|--|
|                    |          |          |                             |                         |                |               |                      |                   |                  |              | Average: 2.6825      | Average: \$134.66         | Sum: \$524.59       | Sum: \$4,197.00      |                             |            |                        |               |                   |                     |  |
|                    |          |          |                             |                         |                |               |                      |                   |                  |              | Average: -0.2500     | Average: \$800.00         | Sum: \$90.00        | Sum: \$1,000.00      |                             |            |                        |               |                   |                     |  |
| Keyla              |          |          |                             |                         |                |               |                      |                   |                  |              |                      |                           |                     |                      |                             |            |                        |               |                   | Average: \$103.00   |  |
|                    | 1        | 11/19/21 | Caroline De_Pivroni         | Deep Cleaning           | 1.0000         | \$800.00      | \$800.00             | 09:00 AM          | 10:15 AM         | 1.2500       | -0.2500              | \$800.00                  | \$90.00             | \$1,000.00           | \$910.00                    | \$90.00    | \$0.00                 | \$0.00        | \$50.00           | \$750.00            |  |
|                    |          |          |                             |                         |                |               |                      |                   |                  |              | Average: -0.1275     | Average: \$53.22          | Sum: \$28.05        | Sum: \$93.00         |                             |            |                        |               |                   |                     |  |
| MC1                |          |          |                             |                         |                |               |                      |                   |                  |              |                      |                           |                     |                      |                             |            |                        |               |                   | Average: \$38.22    |  |
|                    | 1        | 11/19/21 | Abe Havi - 123 Clay St      | Proper Scooper Removal  | 0.1600         | \$15.00       | \$93.75              | 09:05 AM          | 09:30 AM         | 0.4200       | -0.2600              | \$35.71                   | \$7.01              | \$15.00              | \$7.99                      | \$7.01     | \$0.00                 | \$0.00        | \$0.00            | \$35.71             |  |
|                    | 1        | 11/19/21 | Master - 24 Hour Fitness    | Proper Scooper Removal  | 0.1600         | \$15.00       | \$93.75              | 09:35 AM          | 09:55 AM         | 0.3300       | -0.1700              | \$45.45                   | \$5.61              | \$15.00              | \$9.39                      | \$5.61     | \$0.00                 | \$0.00        | \$0.00            | \$45.45             |  |
|                    | 1        | 11/19/21 | Client 50 Test              | Maintenance Service Fit | 0.6700         | \$48.00       | \$71.64              | 10:00 AM          | 10:30 AM         | 0.5000       | 0.1700               | \$96.00                   | \$8.42              | \$48.00              | \$39.58                     | \$8.42     | \$0.00                 | \$0.00        | \$60.00           | \$36.00             |  |
|                    | 1        | 11/19/21 | Abe's Havi - 801 Clay Drive | Proper Scooper Removal  | 0.1700         | \$15.00       | \$88.24              | 08:35 AM          | 09:00 AM         | 0.4200       | -0.2500              | \$35.71                   | \$7.01              | \$15.00              | \$7.99                      | \$7.01     | \$0.00                 | \$0.00        | \$0.00            | \$35.71             |  |
|                    |          |          |                             |                         |                |               |                      |                   |                  |              | Average: -0.0450     | Average: \$62.50          | Sum: \$28.04        | Sum: \$105.00        |                             |            |                        |               |                   |                     |  |
| MC2                |          |          |                             |                         |                |               |                      |                   |                  |              |                      |                           |                     |                      |                             |            |                        |               |                   | Average: \$20.00    |  |
|                    | 1        | 11/19/21 | Baker, Jim                  | Maintenance Service Fit | 1.0000         | \$50.00       | \$50.00              | 08:30 AM          | 08:55 AM         | 0.4200       | 0.5800               | \$119.05                  | \$7.01              | \$50.00              | \$42.99                     | \$7.01     | \$0.00                 | \$0.00        | \$60.00           | \$19.05             |  |
|                    | 1        | 11/19/21 | Johnson, Olivia             | Maintenance Service Fit | 0.2300         | \$25.00       | \$100.00             | 08:00 AM          | 08:25 AM         | 0.4200       | -0.1700              | \$99.52                   | \$7.01              | \$25.00              | \$17.99                     | \$7.01     | \$0.00                 | \$0.00        | \$60.00           | (\$0.48)            |  |
|                    | 1        | 11/19/21 | Adams, Amelia               | Bed Maintenance         | 0.0800         | \$15.00       | \$187.50             | 09:30 AM          | 09:55 AM         | 0.4200       | -0.3400              | \$35.71                   | \$7.01              | \$15.00              | \$7.99                      | \$7.01     | \$0.00                 | \$0.00        | \$50.00           | (\$34.29)           |  |
|                    | 1        | 11/19/21 | Adams, Allan                | Proper Scooper Removal  | 0.1700         | \$15.00       | \$88.24              | 09:00 AM          | 09:25 AM         | 0.4200       | -0.2500              | \$35.71                   | \$7.01              | \$15.00              | \$7.99                      | \$7.01     | \$0.00                 | \$0.00        | \$0.00            | \$35.71             |  |
|                    |          |          |                             |                         |                |               |                      |                   |                  |              | Average: 0.6650      | Average: \$49.54          | Sum: \$197.00       | Sum: \$98.50         |                             |            |                        |               |                   |                     |  |
| MC3                |          |          |                             |                         |                |               |                      |                   |                  |              |                      |                           |                     |                      |                             |            |                        |               |                   | Average: \$0.46     |  |
|                    | 1        | 11/19/21 | Thompson, Gary              | Mowing Weekly           | 5.0000         | \$205.00      | \$41.00              | 08:00 AM          | 12:00 PM         | 4.0000       | 1.0000               | \$51.25                   | \$186.00            | \$415.00             | \$229.00                    | \$48.00    | \$115.00               | \$138.00      | \$50.00           | \$1.25              |  |
|                    | 1        | 11/19/21 | Doe, Caleb                  | Mowing Weekly           | 1.2300         | \$44.00       | \$35.20              | 12:05 PM          | 01:00 PM         | 0.9200       | 0.3300               | \$47.83                   | \$11.00             | \$44.00              | \$33.00                     | \$11.00    | \$0.00                 | \$0.00        | \$50.00           | (\$2.17)            |  |
|                    |          |          |                             |                         |                |               |                      |                   |                  |              | Average: 31.8000     | Average: \$254.00         | Sum: \$181.50       | Sum: \$2,540.00      |                             |            |                        |               |                   |                     |  |
| SCOTT H            |          |          |                             |                         |                |               |                      |                   |                  |              |                      |                           |                     |                      |                             |            |                        |               |                   | Average: \$254.00   |  |
|                    | 1        | 11/19/21 | Master - 24 Hour Fitness    | Fert Round 6A Fungicide | 41.8000        | \$2,540.00    | \$60.77              | 08:00 AM          | 06:00 PM         | 10.0000      | 31.8000              | \$254.00                  | \$181.50            | \$2,540.00           | \$2,358.50                  | \$181.50   | \$0.00                 | \$0.00        | \$0.00            | \$254.00            |  |

6. Set up the table to your preferences as described in “Filter an Analysis Table” on page 21.

## Filter an Analysis Table

You can use filtering in any column to adjust your table.

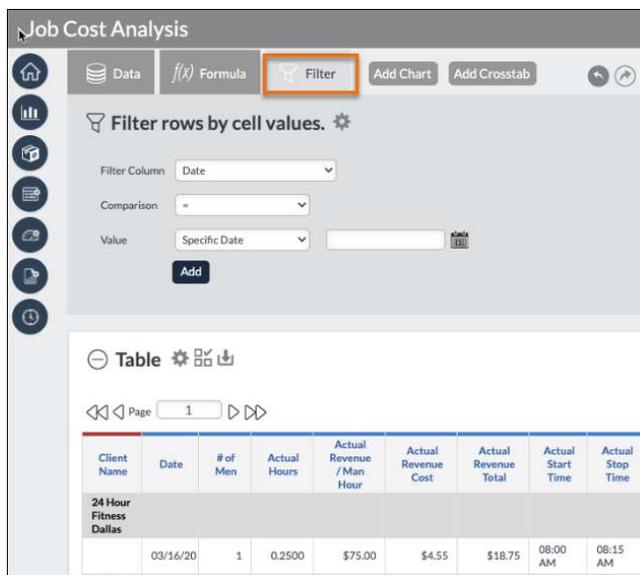
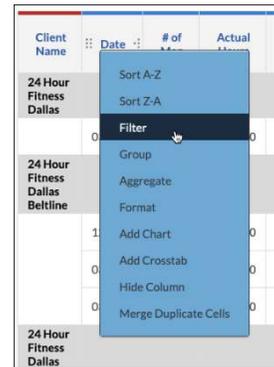
### To change the date

1. Click the **Date** column and then click **Filter** to select a date or date range. This can be either:

**Static date** – a specific date on the calendar

**Relative date** – a sliding date, such as “Yesterday” or “Today”

2. When you select the **Date** Filter, you’ll be moved to the “Filter” tab:



In the **Filter Column** field, the Date appears automatically.

For **Comparison**, select one of the operators.

For **Value**, select **Specific Date** or **Sliding Date**.

- A *specific date* can be either a single fixed date or a fixed date range.

- A *sliding date* can be either one day or a date range. It will always be updated when you view this analysis.

### To move columns

3. In the table, you can move the columns to your preference by hovering over the column name. Six dots appear to the left of the name and the cursor becomes an arrow when you hover over the name.



4. Drag the column in either direction to reposition it.

## An Analysis after reorganizing

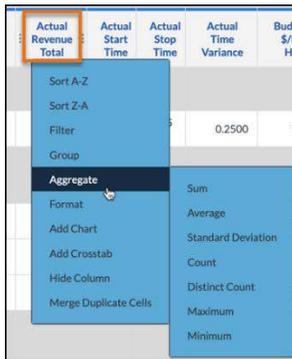
Here is an analysis we reordered:

| Analyst Resource | # of Jobs | Date     | Client Name               | Service Name            | Budgeted Hours | Budgeted Rate | Budgeted \$/Max Hour | Actual Start Time | Actual Stop Time | Actual Hours | Actual Time Variance | Actual Revenue / Max Hour | Actual Revenue Total | Actual Revenue Total | Actual Revenue Gross Margin | Labor Cost | Products Budgeted Cost | Products Cost | Target / Max Hour | Target Over Budget |
|------------------|-----------|----------|---------------------------|-------------------------|----------------|---------------|----------------------|-------------------|------------------|--------------|----------------------|---------------------------|----------------------|----------------------|-----------------------------|------------|------------------------|---------------|-------------------|--------------------|
|                  |           |          |                           |                         |                |               |                      |                   |                  |              | Average: 2.6623      | Average: \$234.66         | Sum: \$5,224.39      | Sum: \$4,197.00      |                             |            |                        |               |                   |                    |
|                  |           |          |                           |                         |                |               |                      |                   |                  |              | Average: -0.2500     | Average: \$100.00         | Sum: \$90.00         | Sum: \$1,000.00      |                             |            |                        |               |                   |                    |
| Karla            | 1         | 11/19/21 | Carroll Dr. Prichon       | Deep Cleaning           | 1.0000         | \$80.00       | \$80.00              | 09:00 AM          | 10:15 AM         | 1.2500       | -0.2500              | \$80.00                   | \$90.00              | \$1,000.00           | \$90.00                     | \$90.00    | \$0.00                 | \$0.00        | \$50.00           | \$750.00           |
|                  |           |          |                           |                         |                |               |                      |                   |                  |              | Average: -0.1275     | Average: \$53.22          | Sum: \$28.05         | Sum: \$98.00         |                             |            |                        |               |                   |                    |
| MCL              | 1         | 11/19/21 | Abe Hurd - 128 Div St     | Pooper Scooper Removal  | 0.1600         | \$15.00       | \$93.75              | 09:05 AM          | 09:20 AM         | 0.4200       | -0.2600              | \$31.71                   | \$7.01               | \$15.00              | \$7.99                      | \$7.01     | \$0.00                 | \$0.00        | \$0.00            | \$3.71             |
|                  | 1         | 11/19/21 | Master - 24 Hour Fitness  | Pooper Scooper Removal  | 0.1600         | \$15.00       | \$93.75              | 09:35 AM          | 09:55 AM         | 0.3300       | -0.1700              | \$43.45                   | \$5.61               | \$15.00              | \$7.99                      | \$5.61     | \$0.00                 | \$0.00        | \$0.00            | \$0.00             |
|                  | 1         | 11/19/21 | Clare St. Tot             | Maintenance Service Fit | 0.6700         | \$48.00       | \$71.64              | 10:00 AM          | 10:30 AM         | 0.5000       | -0.1700              | \$96.00                   | \$8.42               | \$48.00              | \$35.58                     | \$8.42     | \$0.00                 | \$0.00        | \$60.00           | \$36.00            |
|                  | 1         | 11/19/21 | Abey Mah - 801 City Drive | Pooper Scooper Removal  | 0.1700         | \$15.00       | \$88.24              | 08:35 AM          | 09:00 AM         | 0.4200       | -0.2500              | \$33.71                   | \$7.01               | \$15.00              | \$7.99                      | \$7.01     | \$0.00                 | \$0.00        | \$0.00            | \$3.71             |
|                  |           |          |                           |                         |                |               |                      |                   |                  |              | Average: -0.0450     | Average: \$62.50          | Sum: \$28.04         | Sum: \$105.00        |                             |            |                        |               |                   |                    |
| MCC              | 1         | 11/19/21 | Edger Jim                 | Maintenance Service Fit | 1.0000         | \$90.00       | \$90.00              | 08:30 AM          | 08:55 AM         | 0.4200       | 0.5800               | \$119.05                  | \$7.01               | \$90.00              | \$43.99                     | \$7.01     | \$0.00                 | \$0.00        | \$60.00           | \$59.05            |
|                  | 1         | 11/19/21 | Johnnie Orlin             | Maintenance Service Fit | 0.2500         | \$25.00       | \$100.00             | 08:00 AM          | 08:25 AM         | 0.4200       | -0.1700              | \$39.52                   | \$7.01               | \$25.00              | \$17.99                     | \$7.01     | \$0.00                 | \$0.00        | \$60.00           | \$50.48            |
|                  | 1         | 11/19/21 | Adams Analia              | Bed Maintenance         | 0.0800         | \$15.00       | \$187.50             | 09:30 AM          | 09:55 AM         | 0.4200       | -0.3400              | \$33.71                   | \$7.01               | \$15.00              | \$7.99                      | \$7.01     | \$0.00                 | \$0.00        | \$50.00           | \$14.29            |
|                  | 1         | 11/19/21 | Adams Alan                | Pooper Scooper Removal  | 0.1700         | \$15.00       | \$88.24              | 09:00 AM          | 09:25 AM         | 0.4200       | -0.2500              | \$33.71                   | \$7.01               | \$15.00              | \$7.99                      | \$7.01     | \$0.00                 | \$0.00        | \$0.00            | \$3.71             |
|                  |           |          |                           |                         |                |               |                      |                   |                  |              | Average: 0.6630      | Average: \$49.54          | Sum: \$297.00        | Sum: \$98.30         |                             |            |                        |               |                   |                    |
| MCC              | 1         | 11/19/21 | Thompson Gary             | Mowing Weekly           | 5.0000         | \$25.00       | \$125.00             | 08:00 AM          | 12:00 PM         | 4.0000       | 1.0000               | \$51.25                   | \$186.00             | \$415.00             | \$229.00                    | \$48.00    | \$115.00               | \$138.00      | \$50.00           | \$125.00           |
|                  | 1         | 11/19/21 | Dira, Caleb               | Mowing Weekly           | 1.2500         | \$40.00       | \$32.00              | 12:05 PM          | 01:00 PM         | 0.9200       | 0.3300               | \$47.83                   | \$15.00              | \$40.00              | \$33.00                     | \$11.00    | \$0.00                 | \$0.00        | \$50.00           | \$32.17            |
|                  |           |          |                           |                         |                |               |                      |                   |                  |              | Average: 21.8000     | Average: \$254.00         | Sum: \$181.50        | Sum: \$2,540.00      |                             |            |                        |               |                   |                    |
| SCOTT.H          | 1         | 11/19/21 | Master - 24 Hour Fitness  | Full Round SA Fullside  | 11.8000        | \$2,540.00    | \$60.77              | 08:00 AM          | 06:00 PM         | 10.0000      | 1.8000               | \$1,800.00                | \$181.50             | \$2,540.00           | \$2,315.50                  | \$181.50   | \$0.00                 | \$0.00        | \$0.00            | \$154.00           |

## Make an Aggregate Calculation from a Job Cost Analysis

After creating an analysis, you have the option to do some aggregate calculations.

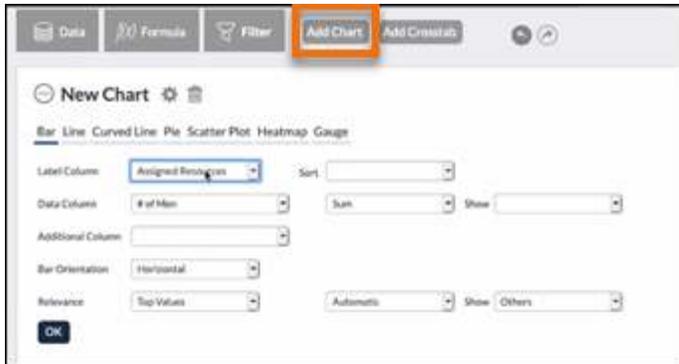
1. Click the column heading. For the example, we clicked the “Actual Revenue Total” column.
2. In the menu, click **Aggregate**.



3. In the submenu, choose any of the aggregate options you want, such as **Sum**.
4. Customize any other column headings as you prefer. A helpful one is to sort the “Date” column into ascending or descending order.

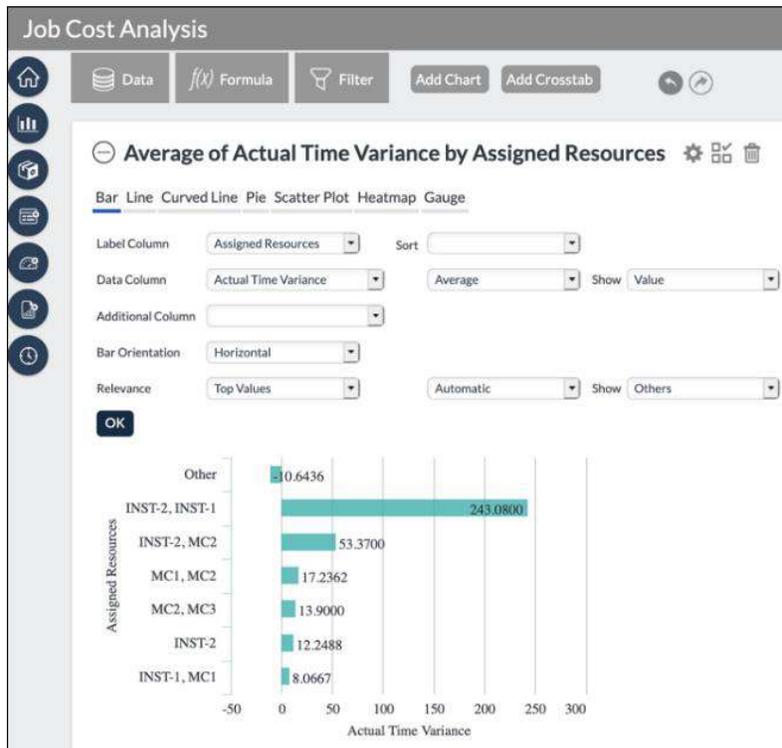
## Build a Chart from a Job Cost Analysis

1. Click **Add Chart**.



2. In the **New Chart** overlay, choose the type of chart, such as Bar, Line, etc.
3. Fill in the rest of the fields.
4. Click **OK** to run the chart analysis.

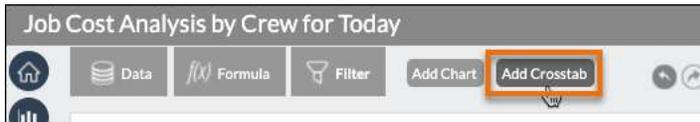
This example shows the average of actual time variance by assigned resources:



## Create a Crosstab

A crosstab is similar to a pivot table in Excel: it compares two fields in a chart with the values in a third field. Follow these steps to add a crosstab:

1. From an analysis, click the **Add Crosstab** button.



2. Select the **Header Values Column**, whose values will be shown horizontally as column headers, across the top of the crosstab table. Additional controls may appear depending on the data type of the selected columns.



3. Select the **Label Values Column**, whose values will be shown vertically, in the left-most column of each row.

4. Select the **Aggregate Values Column**, whose values will be aggregated to produce the contents for the rest of the table cells. For this example, we chose **Average**.

5. Select the **Aggregate Function** to apply to the column selected in step 4. Options include:

- Sum
- Average
- Standard Deviation
- Count and Distinct
- Count
- Minimum
- Maximum

6. Select a **Summary Function** to display a summary result, if applicable.
7. Check the **Compare Label Columns** check box to cause the difference between column values to be displayed, along with a cell shading indicator.
8. Choose a color in the **Reverse Compare Colors** dropdown list. For this example, we chose **Red to Green**.
9. Click **OK**. This will generate the crosstab table, in its own panel; otherwise, the table will be generated automatically as you make changes.

## Add an Item to the Visual Gallery

After you create a table, chart, or crosstab, you can publish it to the Visual Gallery.

1. Click one of the icons shown.

The screenshot shows a dashboard titled "Job Cost Analysis by Crew for Today". It features two main panels. The top panel, "Assigned Resources by Date on Average of Actual Time Variance", displays a table with columns for Date, Kayla, MC1, MC2, MC3, and SCOTT.H, and rows for 2021 and -0.25. The bottom panel, "Average of Actual Time Variance by Assigned Resources", is a bar chart showing time variance for Kayla, MC1, MC2, MC3, and SCOTT.H. Both panels have a "Visual Gallery" icon (a square with 'GG') highlighted with a red box. Below the panels is a "Table" view with a "Visual Gallery" icon also highlighted with a red box. The table contains columns for Assigned Resources, # of Men, Date, Client Name, Service Name, Budgeted Hours, Budgeted Rate, Budgeted \$/Man Hour, Actual Start Time, Actual Stop Time, Actual Hours, Actual Time Variance, Actual Revenue / Man Hour, Actual Revenue Cost, Actual Revenue Total, Actual Revenue Gross Margin, Labor Cost, Products Budgeted Cost, Products Cost, Target / Man Hour, and Target Over (Under).

2. In the **Add to Visual Gallery** dialog, name the table/chart/crosstab.

**Add to Visual Gallery** X

Panel Title:

Panel Description:

3. The item then becomes a separate *panel* that you can add to a dashboard or report.