



Service **Autopilot**™

JOB COSTING

USER GUIDE

V2.6

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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.

Edit Employee

Personal Information Employment **Payroll / Job Costing** User Settings Mobile Settings Alerts Notes Custom Fields Sales Quota

Payroll / Job Costing

Compensation Type:

Resource PIN:

Eligible for Overtime: ☒ No

Costing Information

Hourly Rate:

Hourly Overtime Rate:

Vacation Days Per Year:

Sick Days Per Year:

Commission Percent: %

Legacy Payroll

Payment Frequency:

Last Pay Raise Amount:

Last Pay Raise Date:

[Save](#) or [Cancel](#)

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
Annual Total	\$31,140.00
Monthly based on 12 mo.	\$2,595.00
Weekly based on 52 wks.	\$598.85
Hourly based on 40 hrs.	\$14.97 <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**.

The screenshot shows the 'Edit - Mowing Weekly' service configuration page. The 'Job Costing' tab is selected. The 'Target \$/Hr' is set to 50.00 and 'Target \$/Hr with Drive' is set to 45.00. The 'Avg Years of Service' is set to 10.00. The 'Save' button is highlighted.

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	☐
Show in Snow Dispatch	☐
Income Account	Installation Products
COGS Account	*Cost of Goods Sold <i>*This is the default account for products when creating expenses.</i>
Class	Landscaping Product
Active	☒

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: History: Upcoming (INSTLL3-FIT): 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)	1.00	250.00	5.00	3			

Products (1)

Product	Qty	Rate	Total	B. Hrs	T. B. Hrs	Cost	T. Cost	Margin	Markup
Materials Mulch Hardwood 2lb/Yd	10.00	35.00	350.00	0.75	7.50	23.00	230.00	34.29%	52.17%
Add	10.00		350.00	7.50			230.00	34.29%	52.17%

Add Service

Save or **Cancel**

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**.

Options

Confirm? ☒
Invoice ☐
Create Installed Product ☐

OK

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

Save or **Cancel**

Service Total	250.00
Product Total	555.00
Subtotal	805.00
Tax	42.09
Total	847.09

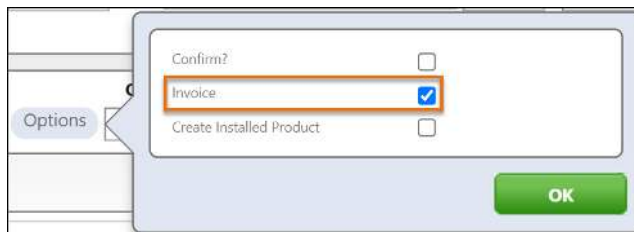
Note: Checking the **Confirm** check box will cause the job to display in red on the Dispatch Board after the job is complete. This reminds you to confirm that the quantity matches what you originally estimated.

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, Kerry Rickard, Jose R. Gonzalez

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

Irrigation Crew (IrrigTm1)
Denise Brown, Kayla Masters

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

Maintenance Crew 2 (MC2)
Anna Taylor, Greg Scott

Maintenance Crew 3 (MC3)
Juan Sanchez, Doug Price

☒ 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.

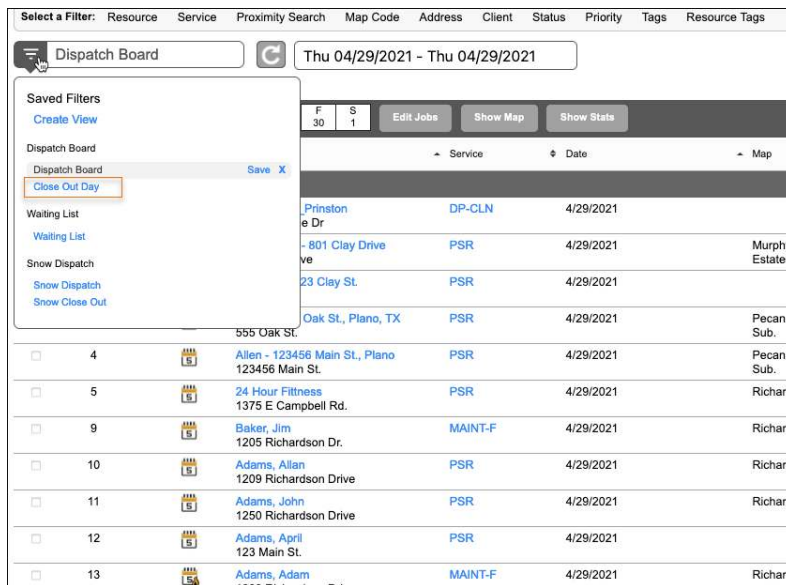
Track Drive Time

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.

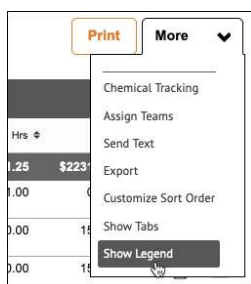
1. From the Dispatch Board, select “Close Out Day” from the dropdown list.



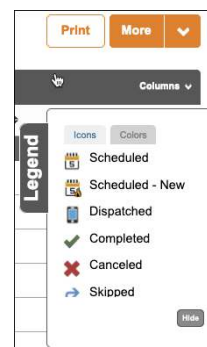
Note: Jobs must be completed before they will appear on the **Job Costing** report. They do not have to be invoiced for them to appear. You also can click any of the fields below to edit them manually if needed.

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' section of a software interface. A search bar at the top contains the text 'job cost'. Below it is a table with three columns: 'SECTION', 'REPORT', and 'DESCRIPTION'. The 'SECTION' column has a single entry 'Job Costing Reports'. The 'REPORT' column lists 'Job Cost Summary' and 'Job Costing Report'. The 'DESCRIPTION' column provides details for each report: 'Shows revenue vs. costs to see how profitable each service provided was.' for the summary and 'Shows the material and labor cost of each job.' for the costing report. The 'Job Costing Report' is highlighted with a mouse cursor.

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: 4/26/2021
End Date: 4/29/2021

Refresh
Print
Export to Excel

4. Click **Refresh**.

The Job Costing report looks like this.

SA Report

Job Costing Report

Filter By

Start Date: 4/29/2021 End Date: 4/29/2021

Refresh Print Export to Excel

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 Hdw - 123 Clay St.	scott.satrain@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 Hdw. - 801 Clay Drive	scott.satrain@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.satrain@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.satrain@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.satrain@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.satrain@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

Help

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 a in	Actual Rev / Man Hr	Target / Man Hr	Target Over (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
0	\$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 actual man hours spent on a Visit in decimal form (for multiple Resources: the **Total Time Worked** multiplied by the **Number of Men**).

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.

SA Report

Job Cost Summary
Wednesday, August 1, 2018 Through Wednesday, August 26, 2020

Filter By: Start: 8/1/2018 End: 8/26/2020 Resource: Service: Customer: Status:

Refresh Print Export to Excel

Budgeted VS Actual

<< Page 1 of 11 >>

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	\$51.11	\$0.00	4.50	\$0.00	\$0.00	\$0.00	\$0.00
A.J. Green	22 Eisenhower Drive Frisco, TX 4055	9/14/2018	Grubbing	\$15.00	\$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 Thieden	3321 Cross Bend Rd Plano, TX 75023	11/25/2019	Snow Plow	\$60.00	\$200.00	\$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	\$65.00	\$196.87	\$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	\$12.56	\$0.00	\$0.00
Ali LeDae	19 Letitia Lane S. Garland, TX 4077	9/24/2019	Bed Maintenance	\$0.00	\$0.00	\$0.00	-0.02	\$0.00	\$0.00	\$0.25	\$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.

Name	Cost	B.Hrs	A.Hrs	Gross Sales	Labor Cost	Materials	Direct Cost	Gross Profit	CM/Hr	CM/Hr/M	A.S/M/Hr
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	\$1,305.54	\$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	\$54.00	\$0.00	\$0.00	\$0.00	\$54.00	\$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	\$51.00	\$0.00	\$50.00	\$0.00	\$1.00	\$0.00	\$0.00	\$0.00
Flower Installation	76.61%	9.00	13.00	\$1,500.00	\$340.44	\$908.50	\$0.00	\$330.86	\$16.04	\$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	2.34%	1.20	2.47	\$2,128.00	\$41.74	\$12.36	\$0.00	\$2,073.90	\$16.92	\$21.93	\$862.70
Lawn Mowing	11.83%	3.22	30.03	\$3,254.32	\$149.40	\$247.52	\$0.00	\$2,957.40	\$14.87	\$9.49	\$333.76
Leaf Cleanup	3.63%	2.00	0.00	\$30.00	\$0.00	\$1.09	\$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 (1/week)	1.45%	0.00	0.33	\$475.50	\$6.91	\$0.00	\$0.00	\$468.59	\$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
Totals	209.60%	28.82	54.88	\$11,376.19	\$551.78	\$1,270.49	\$0.00	\$9,493.72	\$104.67	\$198.43	\$4,883.20

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.

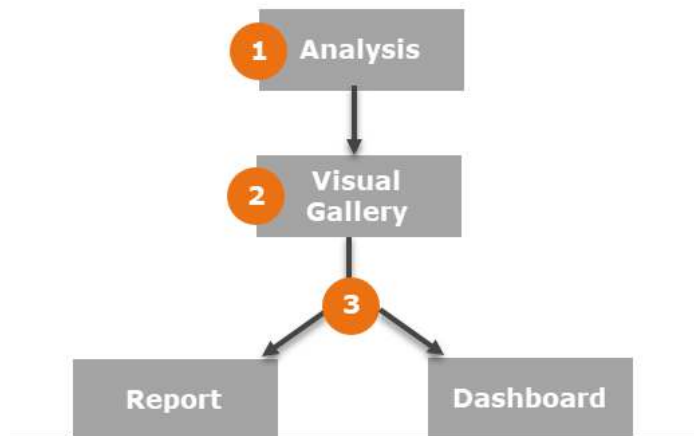
Create a Custom Job Cost Analysis Report

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:

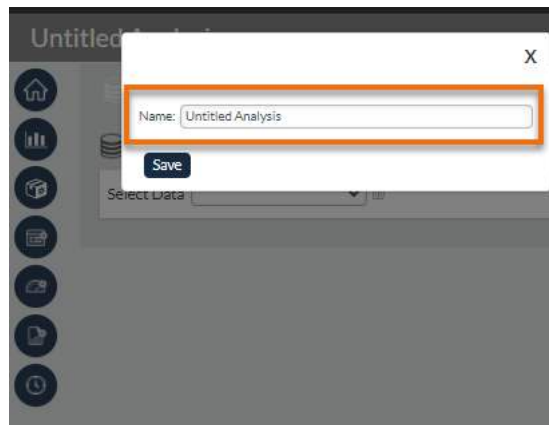
- Table
- Chart
- Crosstab

Follow these steps to create an analysis.

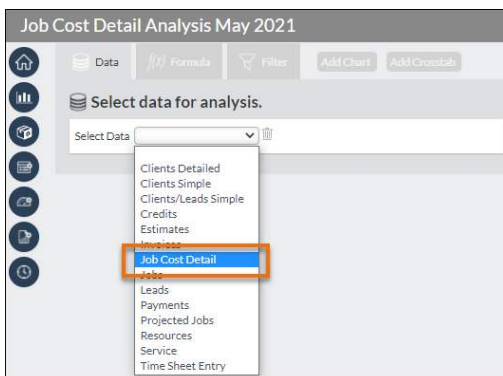
1. Go to **Reports > Report Center** and click **Create Analysis**.



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.

Job Cost Analysis by Crew for Today

Data Formula Filter Add Chart Add Crosstab

Select data for analysis.

Select Data Job Cost Detail

☐ (All)
☒ # of Men
☒ Actual Hours
☒ Actual Revenue / Man Hour
☒ Actual Revenue Cost
☒ Actual Revenue Gross Margin
☐ Actual Revenue Product
☐ Actual Revenue Rate
☒ Actual Revenue Total
☒ Actual Start Time
☒ Actual Stop Time
☒ Actual Time Variance
☒ Assigned Resources
☒ Budgeted \$/Man Hour
☒ Budgeted Hours
☒ Budgeted Rate
☐ Date
☐ Date Sold
☐ Direct Cost
☐ Drive Effect % of Revenue
☐ Drive Effect / Man Hour
☐ Drive Effect Cost
☐ Drive Effect Gross Margin
☐ Drive Effect Hours
☒ Labor Cost
☐ Labor Cost % of Revenue
☐ Labor Cost Avg Cost / Man
☐ Labor Cost Gross Margin
☐ Products % of Revenue
☒ Products Budgeted Cost
☒ Products Cost
☐ Products Gross Margin
☐ Sales Rep
☒ Service Name
☒ Target / Man Hour
☒ Target Over (Under)
☐ Target With Drive / Man Hour
☐ Target With Drive Over (Under)

Select Data Job - Client

☐ (All)
☐ Account Balance
☐ Cancellation Reason
☒ Client Name
☐ Client Since
☐ CSR
☐ Email
☐ Home Phone
☐ Map Code
☐ Sales Rep
☐ Service Address 1
☐ Service Address 2
☐ Service City
☐ Service Postal Code
☐ Service State
☐ Source
☐ Type

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: 2.6625	Average: \$134.66	Sum: \$524.59	Sum: \$4,197.00						Average: \$103.00
Kayla											Average: -0.2500	Average: \$800.00	Sum: \$90.00	Sum: \$1,000.00						Average: \$750.00
MC1											Average: -0.1275	Average: \$53.22	Sum: \$28.05	Sum: \$93.00						Average: \$38.22
	1	11/19/21	Caroline Dr., Princeton	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
	1	11/19/21	Abe Hwt - 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	\$40.00	\$36.00
	1	11/19/21	Abe's Hwt - 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
MC2											Average: -0.0490	Average: \$62.50	Sum: \$28.04	Sum: \$105.00						Average: \$30.00
	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	(\$14.29)
	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
MC3											Average: 0.6650	Average: \$49.54	Sum: \$197.00	Sum: \$459.00						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	1.2500	\$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)
SCOTT H											Average: 31.8000	Average: \$254.00	Sum: \$181.50	Sum: \$2,540.00						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.

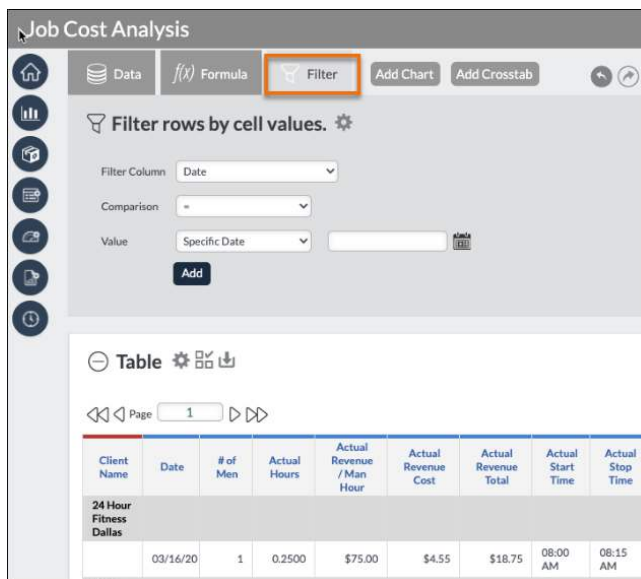
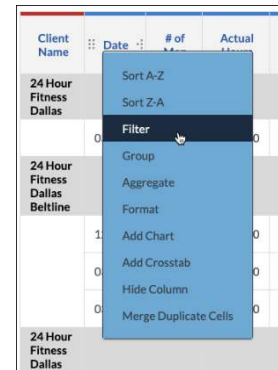
To change the date

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

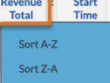
Here is an analysis we reordered:

Table 																			
Assigned Resource	# of Men	Date	Client Name	Service Name	Budgeted Hours	Budgeted Rate	Budgeted Dollar Hour	Actual Start Time	Actual Stop Time	Actual Hours	Actual Time Variance	Actual Revenue / Man-Hour	Actual Revenue Cost	Actual Revenue Gross Margin	Labor Cost	Products Budgeted Cost	Products Cost	Target / Max Hour	Target Cost
											Average: 2.8625	Average: \$534.66	Sum: \$524.39 Aver: \$43.72	Sum: \$4,197.00					Average: \$750.00
Kyle											Average: 0.2500	Average: \$800.00	Average: \$90.00	Sum: \$1,000.00					Average: \$750.00
	1	11/19/21	Concord Dr. Pharms	Data Cleaning	1,000.00	\$800.00	\$800.00	09:00 AM	10:15 AM	1,250.00	0:2500	\$800.00	\$90.00	\$1,000.00	\$910.00	\$90.00	\$0.00	\$50.00	\$750.00
MC1											Average: 0.1275	Average: \$53.22	Sum: \$28.05 Average: \$7.01	Sum: \$90.00					Average: \$68.32
	1	11/19/21	Abe Heed - 123 City St.	Pooper Scooper Removal	0.1600	\$115.00	\$18.40	09:06 AM	09:30 AM	0.4200	0:2600	\$31.71	\$7.01	\$115.00	\$7.99	\$7.01	\$0.00	\$0.00	\$30.00
	1	11/19/21	Master - 24-Hour Fitness	Pooper Scooper Removal	0.1600	\$115.00	\$18.40	09:35 AM	09:55 AM	0.3300	0:1700	\$10.45	\$5.61	\$115.00	\$9.39	\$5.61	\$0.00	\$0.00	\$45.45
	1	11/19/21	Coke 101 West	Maintenance Service Fit	0.6700	\$48.00	\$77.64	10:00 AM	10:30 AM	0.9300	0:1700	\$96.00	\$8.42	\$48.00	\$39.58	\$8.42	\$0.00	\$0.00	\$36.00
	1	11/19/21	Abel 144th - 801 City Drive	Pooper Scooper Removal	0.1700	\$115.00	\$19.55	08:35 AM	09:00 AM	0.4200	0:2500	\$33.71	\$7.01	\$115.00	\$7.99	\$7.01	\$0.00	\$0.00	\$30.71
MC2											Average: 0.0150	Average: \$62.50	Sum: \$28.04 Average: \$7.01	Sum: \$105.00					Average: \$20.00
	1	11/19/21	Robert Inc.	Maintenance Service Fit	1.0000	\$30.00	\$30.00	08:30 AM	08:55 AM	0.4200	0.3800	\$119.05	\$7.01	\$30.00	\$42.99	\$7.01	\$0.00	\$0.00	\$59.05
	1	11/19/21	Johnson, Olivia	Maintenance Service Fit	0.2500	\$23.00	\$57.50	08:00 AM	08:25 AM	0.4200	0:1700	\$59.52	\$7.01	\$23.00	\$37.99	\$7.01	\$0.00	\$0.00	\$50.48
	1	11/19/21	Adams, Annelie	Bed Maintenance	0.0800	\$115.00	\$187.50	09:30 AM	09:55 AM	0.4200	0:3400	\$35.71	\$7.01	\$115.00	\$7.99	\$7.01	\$0.00	\$0.00	\$142.99
	1	11/19/21	Adams, Alan	Pooper Scooper Removal	0.1700	\$115.00	\$19.54	09:00 AM	09:25 AM	0.4200	0:2500	\$33.71	\$7.01	\$115.00	\$7.99	\$7.01	\$0.00	\$0.00	\$33.71
MC3											Average: 0.0610	Average: \$297.00	Sum: \$98.50 Average: \$98.50	Sum: \$459.00					Average: \$90.40
	1	11/19/21	Thompson, Gary	Mowing Weekly	5.0000	\$203.00	\$1,015.00	08:00 AM	12:00 PM	4.0000	1.3800	\$112.50	\$186.00	\$415.00	\$229.00	\$48.00	\$115.00	\$138.00	\$50.00
	1	11/19/21	Dou, Julie	Mowing Weekly	1.2500	\$44.00	\$55.00	12:05 PM	01:00 PM	0.9700	0.3300	\$47.83	\$11.00	\$44.00	\$13.00	\$11.00	\$0.00	\$0.00	\$33.00
SCOTT M											Average: 31.8000	Average: \$254.00	Sum: \$254.00 Average: \$81.50	Sum: \$2,540.00					Average: \$240.00
	1	11/19/21	Master - 24-Hour Fitness	Fertil Round 5A Fertilizer	11.8000	\$2,140.00	\$66.77	08:00 AM	06:00 PM	10.0000	31.8000	\$254.00	\$181.50	\$2,140.00	\$2,316.50	\$181.50	\$0.00	\$0.00	\$181.50

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**.

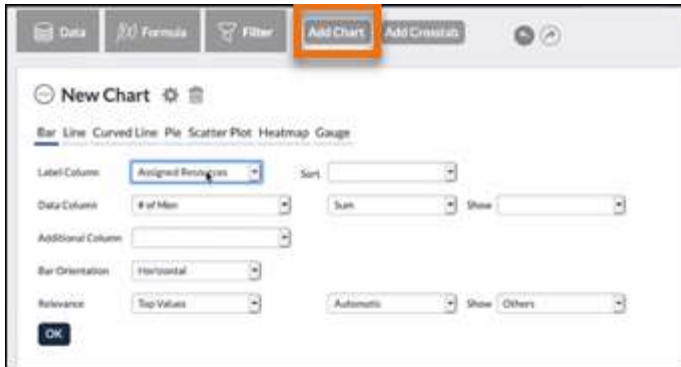


The screenshot shows the 'Actual Revenue Total' cell selected, with a context menu open. The 'Aggregate' option is highlighted, and a mouse cursor is pointing at it. The menu also lists other options like 'Sort A-Z', 'Sort Z-A', 'Filter', 'Group', 'Format', 'Add Chart', 'Add Crosstab', 'Hide Column', and 'Merge Duplicate Cells'. The background shows a portion of the data table with columns for 'Actual Start Time', 'Actual Stop Time', 'Actual Time Variance', and 'Budget \$/Hr'.

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.

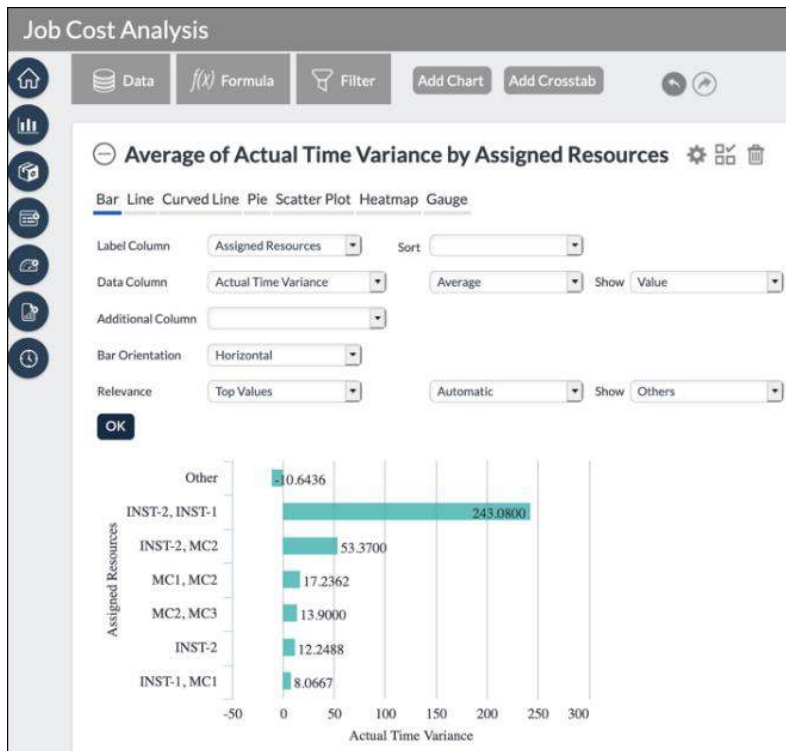
Build a Chart from a Job Cost Analysis

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.

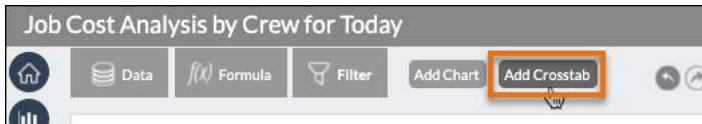
This example shows the average of actual time variance by assigned resources:



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.

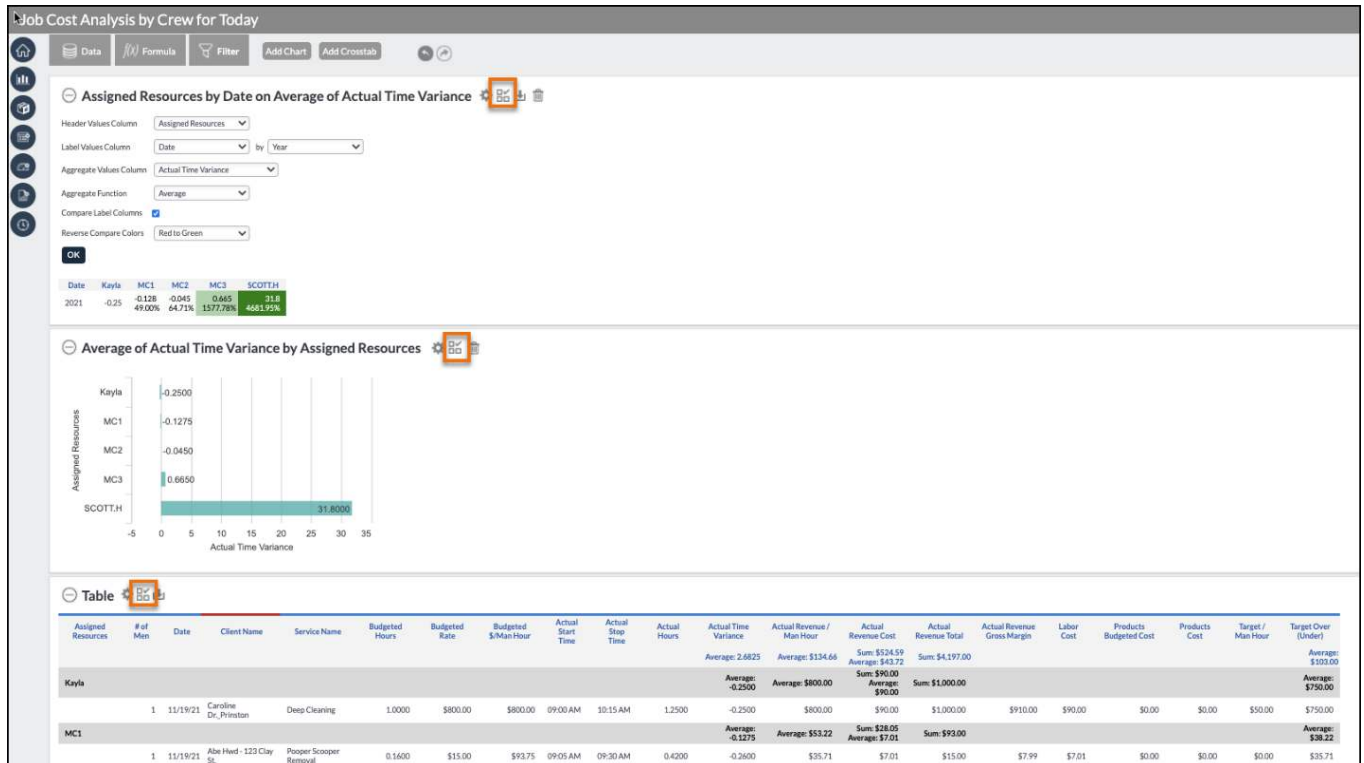
4. Select the **Aggregate Values Column**, whose values will be aggregated to produce the contents for the rest of the table cells. For this example, we chose **Average**.

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.



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

Add to Visual Gallery X

Panel Title:

Panel Description:

Done

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