



Reports by Role

Principal Reports

	Where to find it	Type	How is it useful?
Profit Analysis	Reports > Analyze Tab	XML	This report allows you to compare estimated to actual costs, billable & invoiced amounts to understand how profitable your jobs are.
Agency Gross Profit	Reports > Analyze Tab	XML	This report provides Job level financials based on Job. Includes Job Name, Company, Project, Job Number, Ext. Cost, Int. Cost, Actual Ext, Invoiced, Gross Profit Amount. Only Includes Final Invoices.
Revenue Forecast	Reports > Plan Tab	XML	This report will allow you to check the accuracy of your invoices by comparing the invoices in the current month to the revenue in the current month. You will also be able to forecast the revenue you expect to receive for planning purposes.
Efficiency	Reports > Time Tab	PDF	This report provides info on the efficiency of all active logins. Info includes the number of billable hours versus the payroll cost of a staff person. The number of jobs worked on by the staff person is also included.
Estimate, Actual & Invoiced Dollars	Reports > Analyze Tab	XML	A comprehensive report with estimated, actual, variance and invoiced amounts for services and expenses.
Cost Recovery	Reports > Analyze Tab > Billable Hours Recovered by Client	XML	This compares the billable \$ amount to the amount invoiced based on client & job. Timesheet data is summarized by staff person & expense data is summarized by expense type.

Designer Reports

	Where to find it	Type	How is it useful?
Active Tasks by Staff	Tasks > Find Task > Filter by "Assigned To" & "Status"	CSV	Quickly produce a list of all tasks that are assigned to you.

Traffic Manager Reports

	Where to find it	Type	How is it useful?
Job List By Client	Jobs > Find Job > Job List by Client Icon	PDF	List of jobs organized by client. Includes a comparison between estimated & actuals.
Task/To Dos	Dashboard	Onscreen	All tasks assigned to staff including variance between estimated & actuals & % complete.
Task Find	Recommended filters: Creation Date, Assigned To, Status	CSV	Create a custom report. Outputs determined by filters.
Staff Task	Reports > Task Tab	PDF	Shows tasks by a variety of date ranges & statuses, summarized & sorted by company & job.

Account Executive Reports

	Where to find it	Type	How is it useful?
Job List By Client	Jobs > Find Job > Job List by Client Icon	PDF	List of jobs organized by client. Includes a comparison between estimated & actuals.
Company Find	Recommended filters: Industry, Type, Qualification, Source	CSV	Create a custom report. Outputs determined by filters.
Contact Find	Recommended filters: Industry, Type, Qualification, Source	CSV	Create a custom report. Outputs determined by filters.
New Business by Account	Reports > CRM & Sales > New Business by Account Exec. & Qualification Level	XML	Shows the status and value of estimates as well as content from recent notes.

Accountant/Bookkeeper Reports

	Where to find it	Type	How is it useful?
Invoiced vs. Actuals	Reports > Analyze Tab	PDF	Shows a list of completed jobs within a specified date range.
Payroll	Reports > Time Tab > Payroll Hours	PDF	Pull up a list of timesheets organized by staff within a specified date range.
Estimated vs. Actuals	Reports > Work in Progress Tab	PDF	Examine the variance between estimated vs. actuals & what has been invoiced.
Outstanding Invoice List	Invoices > Find Invoice > Status = "Unpaid"	CSV	Search for all unpaid invoices.