

# Technician Performance Analysis

(This provides tech performance statistics across a variety of categories)

Technician Performance

Standard Criteria | User Defined Criteria

Select Home Department: \*ALL\*

Select Employee: [ ] ...

From Time Log Date: 1/1/2016 Fri

To Time Log Date: 9/30/2016 Fri

Time Detail Options

- Include Travel Time
- Distribute G and A

Technician Summary Options

- Include Detail
- Call Backs Affect Billable Efficiency
- Show Sales Information
- Include Helper Time in Technician Stats.
- Calculate Billable hours off of RPH Goal
- Include departmental Burden
- Use Item Cost for Labor instead of employee pay rate.
- Show Total Sales Volume (Gross Income + Converted Referral Gross Income)
- Show only employees that completed an order in the date range

Sansburg, Arnold  
Between Dates: 01/01/2016 and 09/30/2016

Page : 7

## Time Profile

Code	Description	Hours	Productive	% dept	% Total
<b>Installation HVAC</b>					
OS-LABOR	ONSITE LABOR	13.00	X	27%	16%
TRAVEL	TRAVEL TIME	2.00	X	4%	3%
<b>Total for Installation HVAC</b>				100% Productive	15.00 19%
<b>Residential Service HVAC</b>					
MEETING	Meeting time	3.25		4%	4%
OS-LABOR	ONSITE LABOR	60.00	X	83%	75%
TRAVEL	TRAVEL TIME	0.50	X	1%	1%
<b>Total for Residential Service HVAC</b>				95% Productive	63.75 80%
<b>Service Partner Plan Plumbing</b>					
OS-LABOR	ONSITE LABOR	1.00	X	100%	1%
<b>Total for Service Partner Plan Plumbing</b>				100% Productive	1.00 1%
		79.75			
		76.50			
		3.25			
				Total Time	
				Total Productive Time	
				Total Unproductive Time	

## Service Statistics Summary

	Prod WO's	Bill Hrs.	TTL Time	% FR EST.	~ Tasks / Call	Converted WO's	Conv. Rate	Bill Eff.	Gross Inc.	Avg Sales Per Ticket	Total Sales Volume
<b>Residential Service HVAC</b>											
10180		0.00	0.00	0%	0.00	0	0%		\$0.00		
10182		23.50	3.00	333%	1.00	1	783%		\$4,032.50		
* 10183		1.00	1.00	0%	0.00	0	100%		\$0.00		
10186		10.40	5.00	108%	2.00	1	208%		\$694.48		
10175		0.00	10.00	0%	0.00	1	0%		\$1,772.89		
10176		0.00	10.00	0%	0.00	1	0%		\$1,772.89		
10177		0.00	10.00	0%	0.00	1	0%		\$1,772.89		
10178		0.00	10.00	0%	0.00	1	0%		\$1,772.89		
<b>Actual</b>	<b>7</b>	34.90	48.00	32%	0.43	6	86%	73%	\$11,818.54	\$1,688.36	\$11,819
Shop Average	4		26.42	9%	0.54	4	85%	57%	\$4,859.41	\$1,121.40	
<b>Service Partner Plan Plumbing</b>											
10185		0.00	1.00	0%	0.00	0	0%		\$0.00		
<b>Actual</b>	<b>1</b>	0.00	1.00	0%	0.00	0	0%	0%	\$0.00	\$0.00	\$0
Shop Average	1		0.50	0%	0.00	0	0%	0%	\$0.00	\$0.00	
	8	34.90	49.00	31%	0.38	6	75%	71%	\$11,819	\$1,477	\$11,819

\* -these orders are callbacks and not included in the calculations in this section

**Job Statistics Summary**

Job/Client	Date Started	Date Complete	Est Bill Hrs	Act Bill Hrs	TTL Time /Adj Time	Bill Eff.	Est Revenue	Act Revenue	Est Pft Before	Pft Before LBR/%	TTL Est Pft/%	TTL Pft /%
100033 - Kevin Bacon	02/01/2016	02/25/2016	10.00	34.22	5.00 5.00	884%	\$0	\$4,357	\$0	\$4,277	\$0	\$3,965
J#10170 - Carla Willis	02/26/2016	02/26/2016	24.51	49.61	7.00 7.00	709%	\$3,807	\$3,862	\$1,026	\$2,481	\$886	\$2,043
J#10171 - Dennis Brown	02/26/2016	02/26/2016	47.74	81.98	7.00 154.00	53%	\$4,102	\$4,102	\$1,887	\$4,099	\$1,887	\$3,574
J#10172 - Marshall Tyler	02/26/2016	02/26/2016	46.48	75.48	7.00 7.00	1,078%	\$3,774	\$3,774	\$1,774	\$3,774	\$1,774	\$3,634
Installation HVAC			71.49	117.04	26.00 173.00	68%	\$11,683	\$16,095	\$4,687	\$14,631	\$4,547	\$13,216
Shop Average			79.99	86.04	44.00 191.00	45%	\$3,894	\$5,646	\$3,406	\$5,158	\$1,516	\$4,208
			51.04	53.20	26.00 173.00	31%	\$11,683	\$16,095	\$4,687	\$14,631	\$4,547	\$13,216

**Call Backs Against**

Work Type	Order/Count	Department	Name	Total Hours	Serv By	Date Completed
20	10164	Residential Service HVAC	Harry Williams	4.25	Calvin Hurster	02/23/2016
22	10167	Residential Service HVAC	Kurt Warner	2.00	Calvin Hurster	02/23/2016
<b>Total C/B Hours</b>			<b>6.25</b>			

**Call Backs Run**

Work Type	Order/Count	Department	Name	Total Hours	Caused By	Date Completed
22	10163	Residential Service HVAC	New China Restau	1.00	Calvin Hurster	02/23/2016
51	10173	Installation HVAC	Carla Willis	1.00	Cat Thompson	02/26/2016
<b>Total C/B Hours</b>			<b>2.00</b>			

**Incentive Sales For Technician**

Order #	Item	Description	Quantity	Spiff Amount	Total
10161	AHV-024	YORK ECM VARIABLE 2 TON AIR	1.00	\$ 15.00	\$ 15.00
10162	AHV-024	YORK ECM VARIABLE 2 TON AIR	1.00	\$ 15.00	\$ 15.00
10165	GOLDPERFORM	SPP GOLD PLAN Perform	1.00	\$ 50.00	\$ 50.00
10166	BLK006	1-1/2" BLACK MAL 90 ELBOW	1.00	\$ 1.00	\$ 1.00
10175	SPPG	SPP GOLD PLAN NEW	1.00	\$ 25.00	\$ 25.00
10176	SPPG	SPP GOLD PLAN NEW	1.00	\$ 25.00	\$ 25.00
10177	SPPG	SPP GOLD PLAN NEW	1.00	\$ 25.00	\$ 25.00
10178	SPPG	SPP GOLD PLAN NEW	1.00	\$ 25.00	\$ 25.00
10192	AHV-024	YORK ECM VARIABLE 2 TON AIR	1.00	\$ 15.00	\$ 15.00
10193	AHV-048	YORK ECM VARIABLE 4 TON AIR	1.00	\$ 50.00	\$ 50.00
10193	4THEATPUMP	Heat Pump - 4 Ton	1.00	\$ 100.00	\$ 100.00
<b>Incentive Sales Total:</b>			<b>11.00</b>	<b>\$ 346.00</b>	<b>\$ 346.00</b>

**Technician Referral Summary**

Quote #	Name	Status	Gross Income	Reason Code
<b>Converted in Date Range</b>				
Q100027	Kevin Bacon	Converted	\$4,159.00	
Q100029	Dennis Brown	Converted	\$4,101.69	
<b>Total Referrals: 2</b>			<b>\$8,260.69</b>	
<b>Total Referrals: 2</b>			<b>\$8,260.69</b>	

**Preventive Maintenance Statistics**

	Pot SP	1st. Calls	Sold Agreements	% Sold	PM Performed	PM Renewed	Renewal %	Sold Revenue	Perform Revenue	Renewed Revenue
Installation HVAC	4.00	0.00	0.00	0%	0.00	0.00	0%	\$0.00	\$0.00	\$0.00
Residential Service HVAC	7.00	1.00	4.00	57%	0.00	0.00	0%	\$636.00	\$0.00	\$0.00
Service Partner Plan Plumbir	0.00	0.00	0.00	0%	1.00	0.00	0%	\$0.00	\$0.00	\$0.00
	<b>11.00</b>	<b>1.00</b>	<b>4.00</b>	<b>36%</b>	<b>1.00</b>	<b>0.00</b>	<b>0%</b>	<b>636.00</b>	<b>0.00</b>	<b>0.00</b>

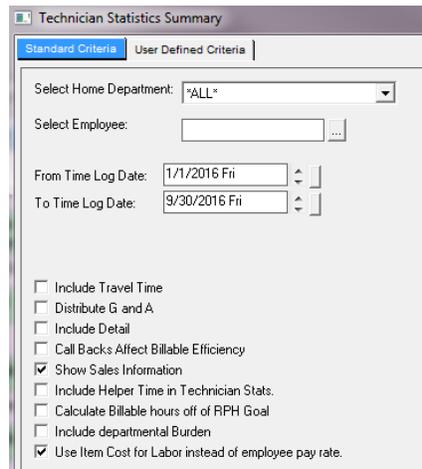
The last page of the report provides summary data at the department level

Productive WO	Billable Hours	Adj Billable Hours	Total Time	% FR Est	Dept Totals		Conversion Rate	Billable Efficiency	Gross Income	Call Backs
					Tasks / Call	Converted WO's				
<b>Installation HVAC</b>										
13	108.65	108.65	49.00	173%	1.31	12	92%	222%	\$31,121.22	1
<b>Installation Plumbing</b>										
1	0.00	0.00	0.00	0%	0.00	1	100%	0%	\$880.00	0
<b>PM Wheelchair Lift</b>										
1	0.50	0.50	0.00	0%	1.00	1	100%	0%	\$750.00	0
<b>Residential Service HVAC</b>										
13	45.02	45.02	69.25	26%	0.54	11	85%	65%	\$14,578.22	1
<b>Residential Service Plumbing</b>										
3	7.76	7.76	5.50	41%	0.67	3	100%	141%	\$857.70	0
<b>Service Partner Plan Plumbing</b>										
2	0.00	0.00	1.00	0%	0.00	0	0%	0%	\$0.00	0

**Notes:**  
**Time Profile:**  
Includes all time logged within the selected date range. Employees are included based on their HOME department assignment.  
**Technician Statistics:**  
Looks at orders where the technician is the lead tech, as designated on the order header, and the order was closed within the selected date range.  
-If the "Show Detail" option is selected, all orders in the date range are displayed. If NOT selected, only summary information is displayed. Orders flagged as Call Backs are NOT included in the order counts for the technician but ARE included in the detail listing. Only times logged to the displayed orders are included in the time analysis in the Technician Performance Section.  
-If "Callbacks affect Billable Efficiency" is selected, adjustments will be made to the Sold Hours (displayed in Adj Sold Hrs field) and Tech Efficiency numbers for all callbacks.  
-For every hour logged to a callback order that is charged to this technician, an hour is ADDED to the technicians On Job Time, negatively affecting their Tech Efficiency.  
-For every hour logged to a callback run by this tech against another tech, an hour is subtracted from their On Job Time, thus increasing their Tech Efficiency.  
-If a technician logs time to a callback charged to themselves, no adjustments are made as the time is already included in their On Job Time.  
Converted WO = Work orders where the tech has sold more than the original order  
Adjusted Sold Hours = adjustments made to the On Job Time for callbacks  
Tech Eff = Sold Hours / On Job Time  
On Job Time = Onsite time (arrival to departure)  
Flat Rate Eff = Item's Flat Rate Labor Hours / On Job Time (both are adjusted for Callbacks, if selected)  
\*Callback Against:  
Count of all callback orders, closed between the selected date range, where the technician is the lead technician on the original offending order. If a technician performs the work on their own callback, it is included in the "Callbacks Against" section only, not in the "Callbacks Run" section.  
\*Callbacks Run:  
Count of all callback orders, closed between the selected date range, where the technician has logged time to the order. If the technician ran a callback charged to himself, it is included in the "Callbacks Against" section of the report.  
**Incentive Sales:**  
Shows all split and piece rate items logged to orders, closed in the selected date range, where the tech is the lead tech on the order. A technician must be configured to receive splits and piece rates, on their employee setup screen, to receive incentives. If multiple technicians are scheduled to a call, the piece rate or Split amount will only be reported for the technician designated as LEAD tech on the order.  
**Technician Referral:**  
Shows all quotes, entered within the selected date range, where the tech is listed as the referral employee.  
**Preventive Maintenance Statistics:**  
Pot SPP Visits - Count of orders run with no service plan (No Service Plan = no valid, unexpired contract. A Contract is a Job Record with the "Is a Contract" checkbox selected)  
1st calls - Count of orders that are the first order for the client  
SPP's Sold -  
Count of all items on orders where the contract activity flag, set on page two of the item setup, is set to SELL  
SPP's Performed - Count of all items on orders where the contract activity flag, set on page two of the item setup, is set to PERFORM  
SPP's Renewed - Count of all items on orders where the item has the contract activity flag, on page two of the item setup, is set to RENEWAL  
\* Callback orders are designated by checking the "Is a Callback" checkbox on an order and linking it to the original offending order. A callback can additionally be created directly from an offending order by selecting the Create Callback option from the order menu button.  
**Note:**  
This report excludes inactive employees ONLY if their termination date is prior to the selected dates.

## Technician Statistics Summary

(This provides a comparison of key results for all technicians)



### Technician Statistics Summary

**Criteria:** Jobs with time Logged between 2016,01,01 and 2016,09,30

	Prod WO's	Bill Hrs.	TTL Time	% FR EST.	~ Tasks / Call	Converted WO's	Conv. Rate	Bill Eff.	Gross Inc.	
, Bravo Team	2	0.00	0.00	0.00	0%	0.00	1	50%	0%	\$299
, Framer	1	0.00	0.00	0.00	0%	0.00	1	100%	0%	\$511
, Roofing	1	0.00	0.00	0.00	0%	0.00	0	0%	0%	\$0
Burns, Jeremy	12	1.00	0.00	0.00	0%	0.00	1	8%	0%	\$624
Chappelle, Dave	3	0.00	0.00	0.00	0%	0.00	2	67%	0%	\$277
Fields, Brad	30	29.92	4.02	4.02	73%	0.07	9	30%	744%	\$9,238
Hurster, Calvin	22	0.00	0.00	0.00	0%	0.00	4	18%	0%	\$992
Keene, Darnell	16	0.00	0.00	0.00	0%	0.00	1	6%	0%	\$295
Krauss, Jason	3	30.00	10.00	10.00	0%	0.00	1	33%	300%	\$24,650
Lacroix, Larry	3	0.00	0.00	0.00	0%	0.00	2	67%	0%	\$800
Levy, Mitch	4	1.00	0.00	0.00	0%	0.00	1	25%	0%	\$11,935
Peak, Robert	1	0.00	0.00	0.00	0%	0.00	0	0%	0%	\$0
Pryor, Richard	5	0.00	0.00	0.00	0%	0.00	0	0%	0%	\$0
Sandler, Adam	7	0.00	2.00	2.00	0%	0.00	2	29%	0%	\$894
Sansburg, Arnold	31	3.94	0.00	0.00	0%	0.35	8	26%	0%	\$7,798
Wesley, Ron	4	0.00	0.00	0.00	0%	0.00	0	0%	0%	\$0
Winchester, Fred	9	0.00	0.00	0.00	0%	0.00	2	22%	0%	\$365
Zak, Thomas	4	50.00	10.00	10.00	0%	0.00	1	25%	500%	\$4,500
	158	115.86	26.02	26%	0.08	36	23%	445%	\$63,176	

# POC Job Analysis Report

(This is used for managing profitability on installation projects)

**POC Job Analysis Report**

Standard Criteria | User Defined Criteria

Job ID: J#12641

Account: [ ]

Department: \*ALL\*

Sales Rep: \*ALL\*

Job Group: \*ALL\*

Job Status: All Jobs

**Options**

Include non-received purchase orders

Only Include POC Jobs

Apply Cost Code Taxes

Apply Cost Code Burden Rates

Use Item Cost for Labor instead of employee pay rate.

Constrain Activity

**Grouping and formatting**

Primary Group: Department

Detail Group: Cost Code

Detail Sub Group: None

Detail Level: None

Group and sub-total by job phase

Page Break Between Jobs

## POC Job Analysis

Criteria: For Dept.: \*ALL\*; From Acct No: From JobID: J#12641 Group by Cost Code;

Dept: B1-Service  
Account 100011 - Harry Williams  
Job J#12641 - RSW Test Installation

Department / Job	Est. Hours	Act. Hours	Hours Variance	Est. Expenses	Act. Expenses	Act Burden	Total Expenses	Expenses % Variance	Committed Cost	Total Proj. Cost	Cost to Complete	Est. Revenues	Act. % Invoiced
Commission	0.00	0.00	0.00	\$50	\$0	\$0	\$0	-\$50 0%	\$0	\$0	\$50	\$0	\$0 0%
Equipment	0.00	0.00	0.00	\$26,630	\$3,500	\$350	\$3,850	-\$22,780 14%	\$0	\$3,850	\$22,780	\$111,000	\$200 0%
Fiat Rate Labor	0.00	4.50	4.50	\$0	\$248	\$25	\$272	\$272 0%	\$0	\$272	\$0	\$0	\$200 0%
Labor	37.00	7.72	-29.28	\$1,845	\$1,945	\$8,180	\$10,145	\$8,300 50%	\$0	\$10,145	\$0	\$199	\$100 50%
Materials	0.00	0.00	0.00	\$2,250	\$1,788	\$179	\$1,967	-\$283 87%	\$3,850	\$5,817	\$283	\$0	\$50 0%
Other	1.00	0.00	-1.00	\$1,300	\$0	\$0	\$0	-\$1,300 0%	\$0	\$0	\$1,300	\$38,000	\$0 0%
Subcontractor	0.00	0.00	0.00	\$2,158	\$958	\$96	\$1,054	-\$1,104 49%	\$0	\$1,054	\$1,104	\$0	\$0 0%
Accrual	0.00	0.00	0.00		\$0	\$0	\$0	\$0					
<b>Subtotal</b>	<b>38.00</b>	<b>12.22</b>	<b>-25.78</b>	<b>\$34,233</b>	<b>\$8,458</b>	<b>\$8,829</b>	<b>\$17,288</b>	<b>-\$16,945 51%</b>	<b>\$3,850</b>	<b>\$21,138</b>	<b>\$16,945</b>	<b>\$149,199</b>	<b>\$610 0%</b>

### Change Orders and Adjustments

Equipment	0.00	0.00	0.00	\$18,100	\$0	\$0	\$0	-\$18,100 0%	\$0	\$0	\$18,100	\$0	\$0 0%
Fiat Rate Labor	0.00	14.29	14.29	\$0	\$0	\$0	\$0	\$0 0%	\$0	\$0	\$0	\$0	\$0 0%
Labor	56.00	17.06	-38.94	\$5,090	\$80	\$0	\$80	-\$5,010 2%	\$0	\$80	\$5,010	\$325	\$0 0%
Materials	0.00	0.00	0.00	\$38	\$0	\$0	\$0	-\$38 0%	\$0	\$0	\$38	\$40	\$0 0%
Other	4.00	0.00	-4.00	\$5,200	\$0	\$0	\$0	-\$5,200 0%	\$0	\$0	\$5,200	\$0	\$0 0%
Subcontractor	0.00	0.00	0.00	\$2,000	\$0	\$0	\$0	-\$2,000 0%	\$0	\$0	\$2,000	\$0	\$0 0%
<b>Subtotal</b>	<b>60.00</b>	<b>31.35</b>	<b>-28.65</b>	<b>\$30,428</b>	<b>\$80</b>	<b>\$0</b>	<b>\$80</b>	<b>-\$30,348 0%</b>	<b>\$0</b>	<b>\$80</b>	<b>\$30,348</b>	<b>\$365</b>	<b>\$0 0%</b>

<b>Ttl Job # J#12641</b>	<b>98.00</b>	<b>43.57</b>	<b>-54.43</b>	<b>\$64,661</b>	<b>\$8,539</b>	<b>\$8,829</b>	<b>\$17,368</b>	<b>-\$47,293 27%</b>	<b>\$3,850</b>	<b>\$21,218</b>	<b>\$47,293</b>	<b>\$149,564</b>	<b>\$610 4%</b>
--------------------------	--------------	--------------	---------------	-----------------	----------------	----------------	-----------------	----------------------	----------------	-----------------	-----------------	------------------	-----------------

### Job Summary

Original Contract	\$14,580	Revenue to Date	\$50
Change Orders	\$365	Estimated Profit	-\$49,736
Total Contract	\$14,925	Profit to date	-\$17,318 -34.830%
Invoice to Date	\$610	Profit Variance	\$32,418 -65%
Remaining to Invoice	-\$14,315	Over / Under	-\$3,959 -60%
Total Est. Cost	\$64,661	Deferred Revenue Bal.	\$260
Cost to Date	\$17,368		
Over/Under Budget	-\$47,293		

\* Estimated expenses and revenue come from converted quotes only. Quotes NOT set to converted will NOT be included.  
 \* Over/Under Budget is calculated by multiplying Estimated Revenue by % Cost to date (Cost Completion Method) and does NOT include Committed Cost  
 \* If Labor is to be based on Time Logged to the project you should NOT include a cost for labor when using a progressive billing method.  
 \* Accrual items are highlighted in **Yellow**

# Marketing Analysis

(This provides insight into the effectiveness of your marketing campaigns)

## Marketing Summary by Date

Criteria: From Date : 2016,01,01 To Date : 2016,08,31 Show All : Yes;

		Potential Sales			Conv. Leads	% Close	Invoiced Sales	Campaign Cost	Cost / Lead	Response Rate	% Of Sales	ROI%
		Leads	Quotes	Orders								
<b>Better Business Bureau</b>												
10156	SVC	1	\$0.00	\$0.00	0.00	\$0.00	0.00					
10160	SVC	1	\$0.00	\$0.00	0.00	\$0.00	0.00					
10166	SVC	1	\$0.00	\$694.48	0.00	\$0.00	0.00					
10167	SVC	1	\$0.00	\$154.00	0.00	\$0.00	0.00					
10182	SVC	1	\$0.00	\$95.40	0.00	\$0.00	0.00					
10183	SVC	1	\$0.00	\$747.00	0.00	\$0.00	0.00					
10182	INV	0	\$0.00	\$0.00	1.00	\$95.40	0.00					
10183	INV	0	\$0.00	\$0.00	1.00	\$747.00	0.00					
	<b>Charlotte BBB</b>	<b>6</b>	<b>\$0.00</b>	<b>\$1,690.88</b>	<b>2.00</b>	<b>33%</b>	<b>\$842.40</b>	<b>0.00</b>	<b>\$0</b>	<b>NA</b>	<b>100%</b>	<b>0%</b>
<b>Subtotal for Better Business Bureau</b>		<b>6</b>	<b>\$0.00</b>	<b>\$1,690.88</b>	<b>2.00</b>	<b>33%</b>	<b>\$842.40</b>	<b>0.00</b>	<b>\$0</b>	<b>NA</b>	<b>7%</b>	<b>0%</b>
10200	SVC	1	\$0.00	\$0.00	0.00	\$0.00	0.00					
10202	SVC	1	\$0.00	\$0.00	0.00	\$0.00	0.00					
10204	SVC	1	\$0.00	\$0.00	0.00	\$0.00	0.00					
	<b>Angie's List</b>	<b>3</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>0.00</b>	<b>0%</b>	<b>\$0.00</b>	<b>0.00</b>	<b>\$0</b>	<b>NA</b>	<b>0%</b>	<b>0%</b>
10158	ORD	1	\$0.00	\$6,100.00	0.00	\$0.00	0.00					
Q100028	QUO	1	\$3,806.95	\$0.00	0.00	\$0.00	0.00					
Q100031	QUO	1	\$0.00	\$0.00	0.00	\$0.00	0.00					
10157	SVC	1	\$0.00	\$0.00	0.00	\$0.00	0.00					
10201	SVC	1	\$0.00	\$0.00	0.00	\$0.00	0.00					
10203	SVC	1	\$0.00	\$0.00	0.00	\$0.00	0.00					
10206	SVC	1	\$0.00	\$0.00	0.00	\$0.00	0.00					
10170	INV	0	\$0.00	\$0.00	1.00	\$3,861.95	0.00					
	<b>Google</b>	<b>7</b>	<b>\$3,806.95</b>	<b>\$6,100.00</b>	<b>1.00</b>	<b>14%</b>	<b>\$3,861.95</b>	<b>0.00</b>	<b>\$0</b>	<b>NA</b>	<b>100%</b>	<b>0%</b>
<b>Print Media</b>												
10168	SVC	1	\$0.00	\$677.98	0.00	\$0.00	5,000.00					
10179	SVC	1	\$0.00	\$467.10	0.00	\$0.00	5,000.00					
10180	SVC	1	\$0.00	\$467.10	0.00	\$0.00	5,000.00					
	<b>Charlotte Observer - 01/15/12</b>	<b>3</b>	<b>\$0.00</b>	<b>\$1,612.18</b>	<b>0.00</b>	<b>0%</b>	<b>\$0.00</b>	<b>5,000.00</b>	<b>\$1,667</b>	<b>NA</b>	<b>0%</b>	<b>-100%</b>
<b>Subtotal for Print Media</b>		<b>3</b>	<b>\$0.00</b>	<b>\$1,612.18</b>	<b>0.00</b>	<b>0%</b>	<b>\$0.00</b>	<b>5,000.00</b>	<b>\$1,667</b>	<b>NA</b>	<b>0%</b>	<b>-100%</b>

	Leads	Potential Sales		Conv. Leads	% Close	Invoiced Sales	Campaign Cost	Cost / Lead	Response Rate	% Of Sales	ROI%	
		Quotes	Orders									
<b>Referrals</b>												
10189	SVC	1	\$0.00	\$750.00	0.00	\$0.00	0.00					
	<b>Client Referrals</b>	<b>1</b>	<b>\$0.00</b>	<b>\$750.00</b>	<b>0.00</b>	<b>0%</b>	<b>\$0.00</b>	<b>0.00</b>	<b>\$0</b>	<b>N/A</b>	<b>0%</b>	<b>0%</b>
Q100027	QUO	1	\$4,169.00	\$0.00	0.00	\$0.00	0.00					
Q100029	QUO	1	\$4,101.69	\$0.00	0.00	\$0.00	0.00					
Q100030	QUO	1	\$3,774.00	\$0.00	0.00	\$0.00	0.00					
10173	SVC	1	\$0.00	\$0.00	0.00	\$0.00	0.00					
10171	INV	0	\$0.00	\$0.00	1.00	\$4,101.69	0.00					
10172	INV	0	\$0.00	\$0.00	1.00	\$3,774.00	0.00					
	<b>Employee Referral</b>	<b>4</b>	<b>\$12,034.69</b>	<b>\$0.00</b>	<b>2.00</b>	<b>50%</b>	<b>\$7,875.69</b>	<b>0.00</b>	<b>\$0</b>	<b>N/A</b>	<b>100%</b>	<b>0%</b>
<b>Subtotal for Referrals</b>		<b>5</b>	<b>\$12,034.69</b>	<b>\$750.00</b>	<b>2.00</b>	<b>40%</b>	<b>\$7,875.69</b>	<b>0.00</b>	<b>\$0</b>	<b>N/A</b>	<b>63%</b>	<b>0%</b>

	Leads	Potential Sales		Conv. Leads	% Close	Invoiced Sales	Campaign Cost	Cost / Lead	Response Rate	% Of Sales	ROI%
		Quotes	Orders								
Better Business Bureau	6	\$0.00	\$1,690.88	2.00	33%	842.40	0.00	\$0	N/A	7%	0%
Print Media	3	\$0.00	\$1,612.18	0.00	0%	0.00	5,000.00	\$1,667	N/A	0%	-100%
Referrals	5	\$12,034.69	\$750.00	2.00	40%	7,875.69	0.00	\$0	N/A	63%	0%
<b>Total</b>	<b>24</b>	<b>\$15,841.64</b>	<b>\$10,153.06</b>	<b>5.00</b>	<b>21%</b>	<b>12,580.04</b>	<b>5,000.00</b>	<b>\$208</b>	<b>N/A</b>	<b>100.00%</b>	<b>110%</b>

**Column Definitions**

**Leads** - Number of quotes plus the number of orders that did not start from a quote from the specified marketing source

**Potential Sales Quotes** - Sum of the extended amount for items that post to Income accounts on open quotes

**Potential Sales Orders** - Sum of the extended amount for items that post to Income accounts on open orders

**Converted Leads** - Count of Invoices in from the specified marketing source

**Close Percentage** - Converted Leads / Leads

**Invoiced Sales** - Sum of the subtotal amount for invoices from the specified marketing source

**Profit** - Sum of the extended sales minus the sum of the extended cost for items that post to Income accounts on Invoices

**%Profit** - Profit / Invoiced Sales

**Campaign Cost** - Amount set on the set on the marketing source code or the sum of all transactions posting to the specified General Ledger account set on the marketing source

**Cost / Lead** - Campaign Cost / Leads

**Response Rate** - If a quantity is set on the marketing source, then Leads / Quantity \* 100 otherwise N/A

**%of Sales** - Actual Sales / Total Sales for the period for each category, Category - Actual Sales / Total Sales for the period

**ROI%** - (Profit - Campaign Cost) / Campaign Cost \* 100

# Sales Rep Tracking Report

Sales Rep Tracking

Standard Criteria | User Defined Criteria

From Date: 1/1/2014 Wed

To Date: 12/31/2014 Wed

Representatives: \*ALL\*

Departments: \*ALL\*

Show Department subtotal for each employee

Show Order Notes

9/12/2016 2:47:37PM

## Sales Rep Tracking

Page: 6

Criteria: From Date: 2014-01-01 To Date: 2014-12-31 Canceled: NOClosed: Yes Employee: All Department: All

**Thomas Zak**

### Quotes Statistics

#### Installation HVAC

Quote#	Client#	Name	Date In Date Assign	Quote Submitted	Days to Submit	Lead Age	Days Pending	Marketing Source	Status	Dollars	Sell Date	Day To Sale	Dollars
Q100020	100221	Yvette Harrison	10/17/2014	10/17/2014	0	0	0		Converted	\$ 2,160.00	10/17/2014	0	\$ 2,160.00
Q100019	100053	Ricky Waters	08/16/2014	12/15/2014	121	121	0	Employee Referral	Converted	\$ 4,000.00	12/15/2014	0	\$ 4,000.00
Q100018	100225	Orville Redenbocher	08/06/2014	08/06/2014	0	0	0		Converted	\$ 7,000.00	08/06/2014	0	\$ 7,000.00
Q100017	100225	Orville Redenbocher	08/06/2014	08/06/2014	0	0	0		Converted	\$ 6,000.00	08/06/2014	0	\$ 6,000.00
Q100016	100225	Orville Redenbocher	08/04/2014	08/04/2014	0	0	0		Converted	\$ 4,200.00	08/04/2014	0	\$ 4,200.00
Q100012	100033	New China Restaurant	01/28/2014	08/04/2014	188	188	0		Canceled	\$ 6,234.00	08/04/2014	0	\$ 0.00
Q1.315523570	100029	Johnny Bravo	06/03/2013	08/04/2014	427	427	0		QS UB	\$ 411.75	08/04/2014	0	\$ 0.00
			07/01/2014		34	34							

9/12/2016 2:47:37PM

## Sales Rep Tracking

Page: 7

Criteria: From Date: 2014-01-01 To Date: 2014-12-31 Canceled: NOClosed: Yes Employee: All Department: All

#### SUBTOTAL for Thomas Zak for Installation HVAC

	From Assigned		From Assigned \$		From Quote Date		From Quote Date \$	
	This Period	Prior 12 Mo	This Period	Prior 12 Mo	This Period	Prior 12 Mo	This Period	Prior 12 Mo
<b>Total Quotes (Leads)</b>	2	0			7	8		
Pending Not Submitted	1	0	\$411.75	\$0.00	0	1	\$0.00	\$411.75
Submitted not Converted/Canceled	0	0	\$0.00	\$0.00	0	0	\$0.00	\$0.00
<b>Total Pending</b>	1	0	411.75	0.00	0	1	0.00	411.75
<b>Total Declined (Cancelled)</b>	0	0	\$0.00	\$0.00	1	1	\$6,234.00	\$6,234.00
<b>Total Converted (Sold)</b>	1	0	\$4,200.00	\$0.00	6	6	\$25,580.00	\$25,580.00

	From Assigned		From Quote Date		Expiring Quotes	Passed Expiration YTD	Work Days in Period	Work Days Remaining
	This Period	Prior 12 Mo	This Period	Prior 12 Mo				
<b>Conversion Rate</b>	0.50%	0.00%	0.86%	0.75%	7	0	261	0
<b>Avg. Dollars Per Sale</b>	4,200.00	0.00	4,263.33	4,263.33			25,580.00	25,580.00
<b>Avg. Days to Sale</b>	0.00	0.00	0.00	0.00				25,580.00
<b>Leads Per Week</b>	0.04	0.00	0.13	0.08				

---

### Sales Rep Tracking

Criteria: From Date: 2014-01-01 To Date: 2014-12-31 Canceled: NO Closed: Yes Employee: All Department: All

**SUBTOTAL for Thomas Zak**

	From Assigned		From Assigned \$		Total		Total \$	
	This Period	Prior 12 Mo	This Period	Prior 12 Mo	This Period	Prior 12 Mo	This Period	Prior 12 Mo
<b>Total Quotes (Leads)</b>	2	0			7	8		
Pending Not Submitted	1	0	\$411.75	\$0.00	0	1	\$0.00	\$411.75
Submitted not Converted/Cancelled	0	0	\$0.00	\$0.00	0	0	\$0.00	\$0.00
<b>Total Pending</b>	1	0	\$411.75	\$0.00	0	1	\$0.00	\$411.75
<b>Total Declined (Cancelled)</b>	0	0	\$0.00	\$0.00	1	1	\$6,234.00	\$6,234.00
<b>Total Converted (Sold)</b>	1	0	\$4,200.00	\$0.00	6	6	\$25,580.00	\$25,580.00

	From Assigned		From Quote Date		Expiring Quotes	Passed Expiration YTD		
	This Period	Prior 12 Mo	This Period	Prior 12 Mo				
<b>Conversion Rate</b>	0.50%	0.00%	0.86%	0.75%	7	0		
<b>Avg. Dollars Per Sale</b>	4,200.00	0.00	4,283.33	4,283.33				
<b>Avg. Days to Sale</b>	0.00	0.00	0.00	0.00				
<b>Leads Per Week</b>	0.04	0.00	0.13	0.08				
					<b>Total Sales this Period</b>	\$25,580.00	<b>Sales YTD</b>	\$25,580.00
							<b>Sales Est at Year End</b>	\$25,580.00

#### Invoice Statistics

Client#	Name	Job ID	Start Date	Complete Date	Status	Proposed Revenue	Actual Revenue	% profit to Date
100239	Ryan Carter	100008	06/01/2013	08/16/2014	Complete	\$0	\$2,219	55%

**Installation HVAC**

Proposed Revenue: \$ 0.00  
 Actual Revenue: \$ 2,218.88

Proposed Revenue: \$ 0.00  
 Actual Revenue: \$ 2,218.88

# Call Center Call Analysis

(This provides call activity and results by CSR)

## Call Tracking Summary

Criteria: For All Statuses For All Reasons : From Date 1/1/2016 : Thru Date 9/30/2016

Call Taker	Date In	Time In	Phone	Status	Account	Order	Notes	Out	B'ked	
ADMIN	05/10/2016	11:04:33	7047796445	BOOKED	100243	10201	Just calling to say Hi!	0	1	
ADMIN	05/17/2016	14:14:39	7047796445	BOOKED	100243	10202	No Air	0	1	
ADMIN	05/17/2016	14:31:20	7047796445	BOOKED	100243			0	0	
ADMIN	08/11/2016	14:32:36	7048455777	BOOKED	100269		no cool	0	0	
ADMIN	08/26/2016	14:33:40	7047796445	BOOKED	100243	123		1	1	
ADMIN	05/10/2016	14:50:03	7047796445	NOT BOOKED	100243		This is a test	0	0	
ADMIN	07/29/2016	11:01:31	7047796445	NOT BOOKED	100024-001		test	0	0	
ADMIN	08/26/2016	12:18:06	7047796445	NOT BOOKED	100243			0	0	
ADMIN	06/10/2016	11:42:28	7047796445	RESOLVED	100243			0	0	
ADMIN	08/11/2016	14:28:27	7047796445	RESOLVED	100024-001		angry caller	0	0	
ADMIN	05/10/2016	11:20:23	7047796445	TRANSFER CALL	100243			0	0	
ADMIN	05/10/2016	11:21:13	7047796445	WRONG NUMBER	100243			0	0	
ADMIN	05/17/2016	14:34:52		WRONG NUMBER			Ord - 123456	0	0	
ADMIN	07/29/2016	11:00:47	7044496445	WRONG NUMBER				0	0	
ADMIN	08/02/2016	13:55:20	7047796445	WRONG NUMBER	100243			0	0	
ADMIN	08/02/2016	13:55:58	7047796445	WRONG NUMBER	100024-001			0	0	
ADMIN	08/11/2016	14:37:14	123456789	WRONG NUMBER				0	0	
ADMIN	08/11/2016	14:38:06	7047796445	WRONG NUMBER	100243			0	0	
ADMIN	08/30/2016	11:07:08	7047796445	WRONG NUMBER	100024-001			1	0	
ADMIN	08/30/2016	11:12:21	7047796445	WRONG NUMBER				0	0	
<b>ADMIN</b>	<b>Total Calls:</b>	<b>20</b>		<b>Inbound Booked:</b>	<b>2</b>		<b>Outbound Booked:</b>	<b>1</b>	<b>2</b>	<b>3</b>
ADMIN2	01/06/2016	14:18:18	7047796445	NEEDS RESOLUTION	100243		Complaint!! She is simply furious she has to work a full we of 5 whole days this week!	0	0	
ADMIN2	01/07/2016	15:22:43	7047796445	NOT BOOKED	100243	10156	dsgr	0	0	
ADMIN2	01/06/2016	14:05:14	7047796445	RESOLVED	100243		Complaint!! She is simply furious she has to work a full we of 5 whole days this week!	0	0	
<b>ADMIN2</b>	<b>Total Calls:</b>	<b>3</b>		<b>Inbound Booked:</b>	<b>0</b>		<b>Outbound Booked:</b>	<b>0</b>	<b>0</b>	<b>0</b>
Kathryn	05/04/2016	14:39:24	7047796445	BOOKED	100243	10200	testing call tracker	0	1	
Kathryn	07/20/2016	10:35:04	7047796445	BOOKED	100024-001		Need air it's hot!!!	0	0	
<b>Kathryn</b>	<b>Total Calls:</b>	<b>2</b>		<b>Inbound Booked:</b>	<b>1</b>		<b>Outbound Booked:</b>	<b>0</b>	<b>1</b>	
<b>Grand Total</b>	<b>Total Calls:</b>	<b>25</b>		<b>Inbound Booked:</b>	<b>3</b>		<b>Outbound Booked:</b>	<b>1</b>	<b>2</b>	<b>4</b>

# Order Profit Analysis

(This provides a quick view of profitability on an order-by-order basis)

## Order Register Profit Analysis Report

Criteria : For Status : "All Closed" From Order No : ZZZZZZZZ From Account No : Thru Account No : ZZZZZZZZ From Date: 1/1/2016 Thru Date: 9/30/2016  
(Orders Selected Based on Date Order Was Completed) (Item Cost Used For Labor) (Use total order quantity) (Using Billed Time for Labor Cost)

Completed	Order No	Name	Amount	Cost	Profit	Profit%
<b>Department: Installation HVAC</b>						
02/23/2016	10161	Kevin Bacon	\$4,357.00	\$220.00	\$4,137.00	94.95%
02/25/2016	10168	Marshall Tyler	\$677.98	\$171.46	\$506.52	74.71%
02/26/2016	10170	Carla Willis	\$3,861.95	\$1,521.42	\$2,340.53	60.60%
02/26/2016	10171	Dennis Brown	\$4,101.69	\$247.71	\$3,853.98	93.96%
02/26/2016	10172	Marshall Tyler	\$3,774.00	\$0.00	\$3,774.00	100.00%
02/26/2016	10173	Carla Willis	\$0.00	\$0.00	\$0.00	0.00%
03/15/2016	10182	Tom Maratta	\$95.40	\$0.00	\$95.40	100.00%
03/15/2016	10183	Tom Maratta	\$747.00	\$315.00	\$432.00	57.83%
04/19/2016	10192	Orville Redenbocher	\$3,774.00	\$1,376.00	\$2,398.00	63.54%
04/19/2016	10193	Orville Redenbocher	\$4,307.00	\$1,000.00	\$3,307.00	76.78%
04/19/2016	10194	Orville Redenbocher	\$3,883.00	\$1,700.00	\$2,183.00	56.22%
08/26/2016	10210	John Wayne	\$1,021.10	\$0.00	\$1,021.10	100.00%
08/31/2016	10211	John Wayne	\$521.10	\$0.00	\$521.10	100.00%
<b>Department: Installation HVAC</b>			<b>\$31,121.22</b>	<b>\$6,551.59</b>	<b>\$24,569.63</b>	<b>78.95%</b>
<b>Department: Installation Plumbing</b>						
06/30/2016	10208	Test Masking	\$880.00	\$562.08	\$317.92	36.13%
<b>Department: Installation Plumbing</b>			<b>\$880.00</b>	<b>\$562.08</b>	<b>\$317.92</b>	<b>36.13%</b>
<b>Department: PM Wheelchair Lift</b>						
03/28/2016	10189	Ed Moore	\$750.00	\$0.00	\$750.00	100.00%
<b>Department: PM Wheelchair Lift</b>			<b>\$750.00</b>	<b>\$0.00</b>	<b>\$750.00</b>	<b>100.00%</b>
<b>Department: Residential Service HVAC</b>						
02/25/2016	10160	Test Schedule	\$0.00	\$0.00	\$0.00	0.00%
02/25/2016	10162	Kevin Bacon	\$4,032.50	\$105.00	\$3,927.50	97.40%
02/23/2016	10163	New China Restaurant	\$77.00	\$35.00	\$42.00	54.55%
02/23/2016	10164	Harry Williams	\$648.94	\$148.75	\$500.19	77.08%
02/06/2016	10166	Kurt Warner	\$694.48	\$197.71	\$496.77	71.53%
02/23/2016	10167	Kurt Warner	\$154.00	\$70.00	\$84.00	54.55%
03/04/2016	10174	Janice Houston	\$1,697.74	\$350.00	\$1,347.74	79.38%
06/23/2016	10207	Sam Smith	\$182.00	\$35.00	\$147.00	80.77%
<b>Department: Residential Service HVAC</b>			<b>\$7,486.66</b>	<b>\$941.46</b>	<b>\$6,545.20</b>	<b>87.42%</b>
<b>Department: Residential Service Plumbing</b>						
02/25/2016	10169	Bill Loelius	\$423.50	\$192.50	\$231.00	54.55%
08/31/2016	10212	John Wayne	\$217.10	\$0.00	\$217.10	100.00%
08/31/2016	10213	John Wayne	\$217.10	\$0.00	\$217.10	100.00%
<b>Department: Residential Service Plumbing</b>			<b>\$857.70</b>	<b>\$192.50</b>	<b>\$665.20</b>	<b>77.56%</b>
<b>Department: Service Partner Plan Plumbing</b>						
04/01/2016	10143	Tiger Woods	\$0.00	\$0.00	\$0.00	0.00%
02/23/2016	10165	Ryan Carter	\$0.00	\$0.00	\$0.00	0.00%
<b>Department: Service Partner Plan Plumbing</b>			<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>0.00%</b>
<b>Grand Total:</b>			<b>\$41,095.58</b>	<b>\$8,247.63</b>	<b>\$32,847.95</b>	<b>79.93%</b>

# Preventive Maintenance Contract Audit Report

(This provides comprehensive data on your maintenance agreements)

## PM Audit Report PM Activity From: 02/01/2016 to 02/29/2016

Criteria: Department: \*ALL\*; Job Group: \*ALL\*;

### Detail of Contracts Expiring

Dept: Priority Advantage

Job Group: Priority Advantage

Job ID: 98002120	Sys Cvr'd	Start Date	Vst Rem / Un Gen	Next Gen Date	Svc Months	Contract Amt	Renewal Amt	Deferred Bal	Amrt Cnt	Amrt Amt
Account No: 5299 C.B. Welchman	2	03/01/2001 02/29/2016	1 / 1		Apr,Oct	\$240.00	\$240.00	\$0	0	\$0.00

Recurring Invoice Information:	Next Date	Amount	Inv per Yr	Annualized \$	Frequency
<b>NO ACTIVE RECURRING BILLING</b>					

Covered Systems:	System Type	Serial Number	Coverage Type	Months of Coverage	Svced Thru	Start Date	Exp Date	Status
	Gas Furnace	W0N8435582 / CTS 9-1	Annual Maintenance	Oct	10/01/2015	03/01/2001	02/29/2016	EXPIRED
	Air Conditioner	L002920845	Annual Maintenance	Apr	04/01/2015	03/01/2001	02/29/2016	EXPIRED

Total Systems Covered under this contract: 2

### Totals by Job Group: Priority Advantage

Contract Count	Contract Amt	Renewal Amt	Deferred Bal
42	\$12,682.00	\$12,682.00	\$0

### Totals by Department: Priority Advantage

Contract Count	Contract Amt	Renewal Amt	Deferred Bal
42	\$12,682.00	\$12,682.00	\$0

**PM Audit Report**  
**PM Activity From: 02/01/2016 to 02/29/2016**

Criteria: Department: \*ALL\*; Job Group: \*ALL\*;

**Detail of Contracts Added and Canceled in Same Month**

**Dept: Priority Advantage**  
**Job Group: Priority Advantage**

Job ID: 100014878	Sys Cvr	Start Date	Vst Rem / Un Gen	Next Gen Date	Svc Months	Contract Amt Cmp/It Date/Flag	Renewal Amt Xnl Date/Flag	Deferred Bal	Amrt Cnt	Amrt Amt
Account No: 314594										
Elda Serrano	3	02/04/2016 12/31/9999	0 / 0		Feb, Aug	\$278.88 N/A Y	\$278.88 02/22/2016 Y	\$0	0	\$0.00

Next Date    Amount    Inv per Yr    Annualized \$    Frequency

Recurring Invoice Information:

**NO ACTIVE RECURRING BILLING**

Covered Systems:

System Type	Serial Number	Coverage Type	Months of Coverage	Svcd Thru	Start Date	Exp Date	Status
Heat Pump	0807X89491	Priority Advantage	Aug	N/A	02/04/2016	12/31/9999	Canceled
Air Handler	0807A87691	Priority Advantage	Feb		02/04/2016	12/31/9999	Canceled
Water Heater		Priority Advantage	Feb, Aug		02/04/2016	12/31/9999	Canceled

Total Systems Covered under this contract: 3

Job ID: 100014959	Sys Cvr	Start Date	Vst Rem / Un Gen	Next Gen Date	Svc Months	Contract Amt Cmp/It Date/Flag	Renewal Amt Xnl Date/Flag	Deferred Bal	Amrt Cnt	Amrt Amt
Account No: 325145										
Dave Zanocchi	0	02/01/2016 12/31/9999	0 / 0			\$240.00 N/A Y	\$240.00 02/15/2016 Y	\$0	0	\$0.00

Next Date    Amount    Inv per Yr    Annualized \$    Frequency

Recurring Invoice Information:

**NO ACTIVE RECURRING BILLING**

Covered Systems:

Total Systems Covered under this contract: 0

Job ID: 100014909	Sys Cvr	Start Date	Vst Rem / Un Gen	Next Gen Date	Svc Months	Contract Amt Cmp/It Date/Flag	Renewal Amt Xnl Date/Flag	Deferred Bal	Amrt Cnt	Amrt Amt
Account No: 325851										
Francesca Armienti	6	02/06/2016 12/31/9999	0 / 0		Mar, Sep	\$629.88 N/A Y	\$629.88 02/26/2016 Y	\$0	0	\$0.00

Next Date    Amount    Inv per Yr    Annualized \$    Frequency

Recurring Invoice Information:

**NO ACTIVE RECURRING BILLING**

Covered Systems:

System Type	Serial Number	Coverage Type	Months of Coverage	Svcd Thru	Start Date	Exp Date	Status
Air Handler	3382KBM1V	Priority Advantage	Sep	N/A	02/06/2016	12/31/9999	Canceled
Heat Pump	3383MAA1F	Priority Advantage	Mar	N/A	02/06/2016	12/31/9999	Canceled
Air Conditioner		Priority Advantage	Mar	N/A	02/06/2016	12/31/9999	Canceled
Air Conditioner		Priority Advantage	Mar	N/A	02/06/2016	12/31/9999	Canceled
Gas Furnace		Priority Advantage	Sep	N/A	02/06/2016	12/31/9999	Canceled
Gas Furnace		Priority Advantage	Sep	N/A	02/06/2016	12/31/9999	Canceled

Total Systems Covered under this contract: 6

\* Equipment is covered by two or more contracts.

**PM Audit Report**  
PM Activity From: 02/01/2016 to 02/29/2016

Criteria: Department: \*ALL\*; Job Group: \*ALL\*;

**Detail of Expired Contracts that have Not Been Canceled**

Dept: Priority Advantage

Job Group: Priority Advantage

System Type	Serial Number	Coverage Type	Months of Coverage	Svcd Thru	Start Date	Exp Date	Status
Gas Furnace	A142444631	Platinum Priority Advantage	Dec	12/01/2015	01/26/2015	01/31/2016	EXPIRED
Air Conditioner	UNKNOWN	Priority Advantage	Jun	06/01/2015	01/26/2015	01/31/2016	EXPIRED

Total Systems Covered under this contract: 2

Job ID: 100009884	Sys Cvr'd	Start Date Exp Date	Vst Rem / Un Gen	Next Gen Date	Svc Months	Contract Amt Cmpmt Date/Flag	Renewal Amt Xnl Date/Flag	Deferred Bal	Amrt Cnt	Amrt Amt
Judy Sowers	2	01/01/2015 01/31/2016	0 / 0		Mar,Sep	\$240.00 N/A N	\$240.00 N/A N	\$0	0	\$0.00

Recurring Invoice Information: **NO ACTIVE RECURRING BILLING**

System Type	Serial Number	Coverage Type	Months of Coverage	Svcd Thru	Start Date	Exp Date	Status
Air Conditioner	2601E05261	Annual Maintenance	Mar	03/01/2015	01/01/2015	01/31/2016	EXPIRED
Gas Furnace	3102A13219	Annual Maintenance	Sep	09/01/2015	01/01/2015	01/31/2016	EXPIRED

Total Systems Covered under this contract: 2

Job ID: 100010215	Sys Cvr'd	Start Date Exp Date	Vst Rem / Un Gen	Next Gen Date	Svc Months	Contract Amt Cmpmt Date/Flag	Renewal Amt Xnl Date/Flag	Deferred Bal	Amrt Cnt	Amrt Amt
Sylvia Haddar	2	01/27/2015 01/31/2016	0 / 0		Jun,Dec	\$240.00 N/A N	\$240.00 N/A N	\$0	0	\$0.00

Recurring Invoice Information: **NO ACTIVE RECURRING BILLING**

System Type	Serial Number	Coverage Type	Months of Coverage	Svcd Thru	Start Date	Exp Date	Status
Gas Furnace	A144718663	Platinum Priority Advantage	Dec	12/01/2015	01/27/2015	01/31/2016	EXPIRED
Air Conditioner	1999	Priority Advantage	Jun	06/01/2015	01/27/2015	01/31/2016	EXPIRED

Total Systems Covered under this contract: 2

Job ID: 100010269	Sys Cvr'd	Start Date Exp Date	Vst Rem / Un Gen	Next Gen Date	Svc Months	Contract Amt Cmpmt Date/Flag	Renewal Amt Xnl Date/Flag	Deferred Bal	Amrt Cnt	Amrt Amt
Mark White	6	02/06/2015 01/31/2016	1 / 1		May,Nov	\$474.00 N/A N	\$474.00 N/A N	\$0	0	\$0.00

Recurring Invoice Information: **NO ACTIVE RECURRING BILLING**

\* Equipment is covered by two or more contracts.

**PM Audit Report**  
PM Activity From: 02/01/2016 to 02/29/2016

Criteria: Department: \*ALL\*; Job Group: \*ALL\*;

**Detail of Active Contracts Canceled or Completed in the Future**

Dept: Priority Advantage

Job Group: Priority Advantage

Job ID: 98008619	Sys Cvr'd	Start Date Exp Date	Vst Rem / Un Gen	Next Gen Date	Svc Months	Contract Amt Cmpmt Date/Flag	Renewal Amt Xnl Date/Flag	Deferred Bal	Amrt Cnt	Amrt Amt
Current Resident	2	10/01/2004 12/31/9999	0 / 0		Apr,Nov	\$239.88 N/A Y	\$239.88 03/08/2016 Y	\$0	0	\$0.00

Recurring Invoice Information: **NO ACTIVE RECURRING BILLING**

System Type	Serial Number	Coverage Type	Months of Coverage	Svcd Thru	Start Date	Exp Date	Status
Air Conditioner	981489359	Priority Advantage	Apr	04/01/2016	10/01/2004	12/31/9999	Canceled
Gas Furnace	L980187103	Priority Advantage	Nov	11/01/2015	10/01/2004	12/31/9999	Canceled

Total Systems Covered under this contract: 2

Job ID: 100010703	Sys Cvr'd	Start Date Exp Date	Vst Rem / Un Gen	Next Gen Date	Svc Months	Contract Amt Cmpmt Date/Flag	Renewal Amt Xnl Date/Flag	Deferred Bal	Amrt Cnt	Amrt Amt
James & Charlene Song	4	03/18/2015 12/31/9999	0 / 0		Apr,Oct	\$434.88 N/A Y	\$434.88 03/01/2016 Y	\$0	0	\$0.00

Recurring Invoice Information: **NO ACTIVE RECURRING BILLING**

System Type	Serial Number	Coverage Type	Months of Coverage	Svcd Thru	Start Date	Exp Date	Status
Air Handler	W544499	Priority Advantage	Apr	04/01/2016	03/18/2015	12/31/9999	Canceled
Air Handler	1885A99795	Priority Advantage	Oct	10/01/2015	03/18/2015	12/31/9999	Canceled
Heat Pump	Z2145B61F	Priority Advantage	Apr	04/01/2016	03/18/2015	12/31/9999	Canceled
Heat Pump	Z231WS92F	Priority Advantage	Apr	04/01/2016	03/18/2015	12/31/9999	Canceled

Total Systems Covered under this contract: 4

Totals by Job Group: Priority Advantage			
Contract Count	Contract Amt	Renewal Amt	Deferred Bal
63	\$17,922.00	\$17,922.00	\$0

Totals by Department: Priority Advantage			
Contract Count	Contract Amt	Renewal Amt	Deferred Bal
63	\$17,922.00	\$17,922.00	\$0

**PM Audit Report**  
**PM Activity From: 02/01/2016 to 02/29/2016**

Criteria: Department: \*ALL\*; Job Group: \*ALL\*;

<b><u>CONTRACT CHANGES</u></b>	<b>Count</b>	<b>Contract Amount</b>	<b>Renewal Amount</b>	<b>Deferred Balance</b>
<sup>1</sup> Beginning Month Total on 2/1/2016:	17,128	\$4,919,754.50	\$4,919,279.28	\$0.00
<b>Contracts Added Between 2/1/2016 - 2/29/2016:</b>	376	\$109,823.12	\$109,823.12	\$0.00
<b>Contracts Canceled Between 2/1/2016 - 2/29/2016:</b>	-301	-\$86,341.76	-\$85,907.60	\$0.00
<sup>2</sup> Month End Total on 2/29/2016:	17,203	\$4,943,235.86	\$4,835,000.08	\$0.00
<b><u>RENEWAL INFORMATION</u></b>				
<b>Contracts Renewed Between 2/1/2016 - 2/29/2016:</b>	82	\$23,213.68	\$23,213.68	\$0.00
<b>Contracts Expiring Between 2/1/2016 - 2/29/2016:</b>	42	\$12,922.00	\$12,922.00	\$0.00
<b><u>ADDITIONAL INFORMATION</u></b>				
<b>Expired Contracts that have Not Been Canceled:</b>	22	\$7,989.00	\$6,542.00	\$0.00
<sup>3</sup> <b>Contracts Added then Canceled Between 2/1/2016 - 2/29/2016</b>	5	\$1,628.40	\$1,628.40	\$0.00
<b>Contracts Canceled or Completed after 2/29/2016:</b>	68	\$19,356.00	\$19,331.00	\$0.00
<sup>4</sup> <b>Needs Review:</b>	0	\$0.00	\$0.00	\$0.00

<sup>1</sup> Beginning Month Total - contains all PM Contracts that were active at the beginning of the month. This total includes all contracts listed in the Renewal Information and Additional Information sections above.

<sup>2</sup> Month End Total - contains all PM Agreements that were active at the end of the month. This total includes all contracts listed in the Renewal Information and Additional Information sections above. (Please Note: Previously expired (but not canceled) and expiring contracts are included in this number due to the grace period many of our customers extend to their clients.)

<sup>3</sup> These contracts have a net effect of 0 and donot change the Beginning or Month End Totals.

<sup>4</sup> Needs Review - Contracts that don't fit into an existing category. These should be reviewed and corrected. Contracts in this section are included in the beginning and ending month totals above.