

## Reports and Dashboard Guide

This guide provides a summary of the Lightning Reports and Dashboard available in your improveit 360 LE system out of the box. Prior to your company's "Go-Live" with improveit 360, your team should review this document and work with your Onboarding Specialist to create any additional Reports your company needs.

#	Name	Type	Folder
1	Active Projects	Summary	Projects
2	All Sales with Outstanding Balance	Summary	Sales
3	All Un-Resulted Appointments	Summary	Appointment
4	Appointment Performance by Rep	Summary	Appointment
5	Appointment Performance Year over Year	Matrix	Appointment
6	Approved Sales without Projects	Tabular	Sales
7	Canceled Sales Report	Summary	Sales
8	Collections by Month YTD	Matrix	Sales
9	Product Sales YTD	Summary	Sales
10	Projects with Project Costs	Summary	Projects
11	Sales Efficiency by Rep	Summary	Sales
12	Sales Opportunity Conversion	Summary	Sales
13	Sales by Month	Summary	Sales
14	Sales by Month by Rep YTD	Matrix	Sales
15	Source Cost Performance	Joined	Lead Sources

## #1 Active Projects


This Report shows the Projects in Active Status, the report is grouped by the Project Name and displays all the Project Activities within that Project.

Report: Projects with Project Activities								
<b>Active Projects</b>								
<input type="checkbox"/> Project Name ↑	Project Activity Name	Project Manager	Start Date	Assigned To: Staff Name	Start	End	Sale Amount	Balance Due
	Re-Measure		-	Olivia Admin	9/12/2023, 11:15 AM	9/12/2023, 12:45 PM	\$29,800.00	\$14,050.00
	Schedule Install		-	Olivia Admin	9/12/2023, 12:00 PM	9/12/2023, 12:00 PM	\$29,800.00	\$14,050.00
	Order Roofing Materials		-	-	-	-	\$29,800.00	\$14,050.00
	Installation		-	-	-	-	\$29,800.00	\$14,050.00
	Post Job Inspection		-	-	-	-	\$29,800.00	\$14,050.00
<b>Subtotal</b>							\$29,800.00	\$14,050.00
<input type="checkbox"/> PRJ-13031 (7)	Approve Contract		-	-	-	-	\$29,800.00	\$9,250.00
	Re-Measure		-	-	-	-	\$29,800.00	\$9,250.00
	Get Permit		-	-	-	-	\$29,800.00	\$9,250.00
	Order Window Materials		-	-	-	-	\$29,800.00	\$9,250.00
	Schedule Install		-	-	-	-	\$29,800.00	\$9,250.00
	Installation		-	-	-	-	\$29,800.00	\$9,250.00
	Post Job Inspection		-	-	-	-	\$29,800.00	\$9,250.00
<b>Subtotal</b>							\$29,800.00	\$9,250.00
<input type="checkbox"/> PRJ-13033 (6)	Service Measure	Steven Service	8/8/2023	Steven Service	8/8/2023, 3:30 PM	8/8/2023, 4:30 PM	\$9,350.00	\$5,350.00
	Schedule Service Install	Steven Service	8/8/2023	Steven Service	8/20/2023, 4:28 PM	8/20/2023, 4:28 PM	\$9,350.00	\$5,350.00
	Return Customer's Exterior Paint	Steven Service	8/8/2023	Steven Service	8/25/2023, 10:00 AM	8/25/2023, 1:30 PM	\$9,350.00	\$5,350.00
	Service Order	Steven Service	8/8/2023	Peter Project	8/9/2023, 4:28 PM	8/9/2023, 4:28 PM	\$9,350.00	\$5,350.00
	Service Receive Order	Steven Service	8/8/2023	Wallace Warehouse	8/19/2023, 4:28 PM	8/19/2023, 4:28 PM	\$9,350.00	\$5,350.00
	Service Install	Steven Service	8/8/2023	-	-	-	\$9,350.00	\$5,350.00
<b>Subtotal</b>							\$9,350.00	\$5,350.00
<b>Total (36)</b>							\$76,160.00	\$32,250.00



## #2 All Sales with Outstanding Balance

This Report shows all Sales with a Balance Due greater than zero (0) and is grouped by the Status of the Sale.

 Report: Sales  
**All Sales with Outstanding Balance**

Total Records	Total Original Sold Price	Total Balance Due
10	\$142,936.63	\$125,911.61

<input type="checkbox"/> Status ↑ ▾	Sale Name ▾	Original Sold Price ▾	Balance Due ▾
<input type="checkbox"/> In Review (5)	S-08696	\$9,350.00	\$5,350.00
	S-08692	\$25,634.83	\$25,634.83
	S-08700	\$25,336.87	\$25,336.87
	S-08698	\$1,654.99	\$1,654.99
	S-08699	\$11,099.94	\$11,099.94
<b>Subtotal</b>		\$73,076.63	\$69,076.63
<input type="checkbox"/> Approved (2)	S-08686	\$0.00	\$4,424.98
	S-08687	\$60.00	\$60.00
<b>Subtotal</b>		\$60.00	\$4,484.98
<input type="checkbox"/> Net (3)	S-08695	\$29,800.00	\$23,300.00
	S-08685	\$7,500.00	\$3,550.00
	S-08688	\$32,500.00	\$25,500.00
<b>Subtotal</b>		\$69,800.00	\$52,350.00
<b>Total (10)</b>		\$142,936.63	\$125,911.61



### #3 All Un-Resulted Appointments

This Report shows all Appointments with a Status of Pending and is grouped by the Staff Member assigned in the Sales Rep 1 field. This will give managers a good understanding of which Sales Reps are failing to record the outcome of the Appointment, which is a critical step for accurate Reporting.



Report: Sales Appointments

#### All Un-Resulted Appointments

Total Records

4

<input type="checkbox"/> Sales Rep 1: Staff Name ↑ ▾	Sales Appointment Name ▾	Appointment Date/Time ▾	Product Categories ▾	Status ▾	Status Detail ▾
<input type="checkbox"/> - (4)	SA-59540	12/25/2023, 8:00 AM	Blinds, Doors	Pending	Assigned
	SA-59542	1/1/2024, 10:00 AM	Roofing, Windows	Pending	Assigned
	SA-59550	-	Gutters	Pending	Set
	SA-59552	-	Doors	Pending	Set
<b>Subtotal</b>					
<b>Total (4)</b>					

## #4 Appointment Performance by Rep

This Report shows the number of Sets, Canceled, Issued, Demoed and Sold Appointments for a given time frame as well as Demo%, Issue%, Cancel% and Close% grouped by the Sales Rep 1 Staff member.

Report: Sales Appointments with w/o Sales												
Appointment Performance by Rep <span style="float: right;">Enable Field</span>												
Total Original Sold Price	Total Set	Total Canceled	Total Issued	Total Demoed	Total Sold	Demo %	Issue %					
\$142,936.63	21	4	13	13	10	100.00%	61.90%					
<input type="checkbox"/> Sales Rep 1: Staff Name ↑	Sum of Original Sold Price	Sum of Set	Sum of Canceled	Sum of Issued	Sum of Demoed	Sum of Sold	<i>fx</i> Demo %	<i>fx</i> Issue %	<i>fx</i> Cancel %	<i>fx</i> Close % (Issued)	<i>fx</i> Close % (Demo)	
<input type="checkbox"/> -	\$51,159.94	10	2	4	4	4	100.00%	40.00%	20%	100%	100%	
<input type="checkbox"/> Cecil Sales	\$0.00	1	0	1	1	0	100.00%	100.00%	0%	0%	0%	
<input type="checkbox"/> Olivia Admin	\$40,804.99	7	2	5	5	4	100.00%	71.43%	29%	80%	80%	
<input type="checkbox"/> Sammy Sales	\$25,634.83	1	0	1	1	1	100.00%	100.00%	0%	100%	100%	
<input type="checkbox"/> Steven Service	\$25,336.87	1	0	1	1	1	100.00%	100.00%	0%	100%	100%	
<input type="checkbox"/> Sylvia Sales	\$0.00	1	0	1	1	0	100.00%	100.00%	0%	0%	0%	
<b>Total</b>	\$142,936.63	21	4	13	13	10	100.00%	61.90%	19%	77%	77%	

## #5 Appointment Performance Year over Year

This matrix style Report shows the number of Sets, Canceled, Issued, Demoed and Sold Appointments grouped by the Appointment Date's Calendar Month as well as the Sales Rep 1 Staff member. Allowing you to see volume year over year for each Sales Rep.


 Report: Sales Appointments with w/o Sales  
**Appointment Performance Year over Year**

Sales Rep 1: Staff Name	Appointment Date/Time	-	CY2023	CY2024	Total
<input type="checkbox"/> -	Sum of Set	2	7	1	10
	Sum of Canceled	0	2	0	2
	Sum of Issued	0	4	0	4
	Sum of Demoed	0	4	0	4
	Sum of Original Sold Price	\$0.00	\$51,159.94	\$0.00	\$51,159.94
<input type="checkbox"/> Cecil Sales	Sum of Set	0	1	0	1
	Sum of Canceled	0	0	0	0
	Sum of Issued	0	1	0	1
	Sum of Demoed	0	1	0	1
	Sum of Original Sold Price	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/> Olivia Admin	Sum of Set	0	7	0	7
	Sum of Canceled	0	2	0	2
	Sum of Issued	0	5	0	5
	Sum of Demoed	0	5	0	5
	Sum of Original Sold Price	\$0.00	\$40,804.99	\$0.00	\$40,804.99
<input type="checkbox"/> Sammy Sales	Sum of Set	0	1	0	1
	Sum of Canceled	0	0	0	0
	Sum of Issued	0	1	0	1
	Sum of Demoed	0	1	0	1
	Sum of Original Sold Price	\$0.00	\$25,634.83	\$0.00	\$25,634.83
<input type="checkbox"/> Steven Service	Sum of Set	0	1	0	1
	Sum of Canceled	0	0	0	0
	Sum of Issued	0	1	0	1
	Sum of Demoed	0	1	0	1
	Sum of Original Sold Price	\$0.00	\$25,336.87	\$0.00	\$25,336.87
<input type="checkbox"/> Sylvia Sales	Sum of Set	0	1	0	1
	Sum of Canceled	0	0	0	0
	Sum of Issued	0	1	0	1
	Sum of Demoed	0	1	0	1
	Sum of Original Sold Price	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total</b>	Sum of Set	2	18	1	21
	Sum of Canceled	0	4	0	4
	Sum of Issued	0	13	0	13
	Sum of Demoed	0	13	0	13
	Sum of Original Sold Price	\$0.00	\$142,936.63	\$0.00	\$142,936.63



## #6 Approved Sales without Projects

This tabular style Report allows you to quickly see which Sales in an Approved Status do not yet have a Project created. This report utilizes a Cross Filter to exclude Sales with Projects from the report.



Report: Sales with or without Projects custom

### Approved Sales without Projects

Total Records	Total Total	Total Balance Due
1	\$32,500.00	\$25,500.00

	Sale Name <input type="text"/>	Approved On <input type="text"/>	Total <input type="text"/>	Balance Due <input type="text"/>	Project Name <input type="text"/>
1	S-08688	7/26/2023	\$32,500.00	\$25,500.00	-
2			\$32,500.00	\$25,500.00	

## #7 Canceled Sales Report

This summary style Report is grouped by the Sales Rep 1 Staff Member who ran the Appointment and shows the Cancel % and Canceled Volume for each Sales Rep. This Report shows only Appointments that resulted in a Sale.

Report: Sales Appointments with w/o Sales  
**Canceled Sales Report**

Total Records	Total Set	Total Issued	Total Demoed	Total Sold	Total Original Sold Price	Total Canceled	Cancel %
10	10	10	10	10	\$0.00	0	0%

<input type="checkbox"/> Sale Name ↑	Sales Rep 1: Staff Name ↑	Sales Appointment Name	Set	Issued	Demoed	Sold	Original Sold Price	Canceled	fx Cancel %	fx Cancel Volume %
<input type="checkbox"/> - (10)	- (4)	SA-59544	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	0	-	-
		SA-59543	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	0	-	-
		SA-59541	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	0	-	-
		SA-59551	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	0	-	-
	<b>Subtotal</b>		4	4	4	4	\$0.00	0	0%	0%
	Olivia Admin (4)	SA-59547	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	0	-	-
		SA-59546	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	0	-	-
		SA-59561	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	0	-	-
		SA-59564	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	0	-	-
	<b>Subtotal</b>		4	4	4	4	\$0.00	0	0%	0%
	Sammy Sales (1)	SA-59566	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	0	-	-
	<b>Subtotal</b>		1	1	1	1	\$0.00	0	0%	0%
	Steven Service (1)	SA-59567	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	0	-	-
	<b>Subtotal</b>		1	1	1	1	\$0.00	0	0%	0%
<b>Subtotal</b>			10	10	10	10	\$0.00	0	0%	0%
<b>Total (10)</b>			10	10	10	10	\$0.00	0	0%	0%


Report: Sales Appointments with w/o Sales  
**Canceled Sales Report**

Total Records	Total Set	Total Issued	Total Demoed	Total Sold	Total Original Sold Price	Total Canceled	Cancel %
10	10	10	10	10	\$1,654.99	0	0%

<input type="checkbox"/> Sale Name ↑	Sales Rep 1: Staff Name ↑	Sales Appointment Name	Set	Issued	Demoed	Sold	Original Sold Price	Canceled	fx Cancel %	fx Cancel Volume %
<input type="checkbox"/> - (9)	- (4)	SA-59544	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	0	-	-
		SA-59543	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	0	-	-
		SA-59541	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	0	-	-
		SA-59551	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	0	-	-
	<b>Subtotal</b>		4	4	4	4	\$0.00	0	0%	0%
	Olivia Admin (3)	SA-59547	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	0	-	-
		SA-59561	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	0	-	-
		SA-59564	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	0	-	-
	<b>Subtotal</b>		3	3	3	3	\$0.00	0	0%	0%
	Sammy Sales (1)	SA-59566	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	0	-	-
	<b>Subtotal</b>		1	1	1	1	\$0.00	0	0%	0%
	Steven Service (1)	SA-59567	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	0	-	-
	<b>Subtotal</b>		1	1	1	1	\$0.00	0	0%	0%
<b>Subtotal</b>			9	9	9	9	\$0.00	0	0%	0%
<input type="checkbox"/> S-08698 (1)	Olivia Admin (1)	SA-59546	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$1,654.99	0	-	-
	<b>Subtotal</b>		1	1	1	1	\$1,654.99	0	0%	0%
<b>Subtotal</b>			1	1	1	1	\$1,654.99	0	0%	0%
<b>Total (10)</b>			10	10	10	10	\$1,654.99	0	0%	0%

## #8 Collections by Month YTD

This matrix style Report is grouped by the Payment Type and the Calendar Month so how payments collected by Type and by Month. Row details are visible beneath the matrix for ease of navigating to records within the report.


Report: Sales with Payments  

### Collections by Month YTD

Total Records    Total Amount  
**7**                    **\$22,100.00**

Type Detail ▾	Received On → ▾	August 2023	December 2023	Total
<input type="checkbox"/> Cash	Sum of Amount Record Count	\$0.00 0	\$50.00 1	\$50.00 1
<input type="checkbox"/> Check	Sum of Amount Record Count	\$0.00 0	\$3,550.00 1	\$3,550.00 1
<input type="checkbox"/> Credit Card	Sum of Amount Record Count	\$4,000.00 1	\$0.00 0	\$4,000.00 1
<input type="checkbox"/> ACH	Sum of Amount Record Count	\$14,500.00 4	\$0.00 0	\$14,500.00 4
<b>Total</b>	Sum of Amount Record Count	\$18,500.00 5	\$3,600.00 2	<b>\$22,100.00 7</b>

Details (7 Rows)    ⓘ Click an intersection in the table above to filter details.

	Sale Name ▾	Payment Name ▾	Amount ▾
2	S-08685	P-12098	\$3,550.00
3	S-08696	P-12102	\$4,000.00
4	S-08695	P-12101	\$2,000.00
5	S-08688	P-12104	\$7,000.00
6	S-08695	P-12100	\$4,500.00
7	S-08686	P-12103	\$1,000.00
8			\$22,100.00

## #9 Product Sales YTD

This summary style Report shows Sales grouped by Product Name and includes the Sum of the Sale Item as well as the Average Unit Price and the % of overall Volume each Product makes up of the Total.



Report: Sales with Sale Items  
**Product Sales YTD**

Total Records	Total Quantity	Total Item Total	AVG Unit Price	Volume %
36	590.00	\$146,356.62	\$699.80	-

<input type="checkbox"/> Product: Product Name ↑	Sum of Quantity	Sum of Item Total	Record Count	fx AVG Unit Price	fx Volume %
<input type="checkbox"/> Blinds	1.00	\$10.00	1	\$10.00	0%
<input type="checkbox"/> CertainTeed Filtered Ridge Vent	30.00	\$23,699.70	2	\$789.99	5%
<input type="checkbox"/> CertainTeed Ice & Water Shield	14.00	\$49.00	2	\$3.50	2%
<input type="checkbox"/> CertainTeed XT25 Eaves + Rakes Length	49.00	\$12,585.00	3	\$245.00	8%
<input type="checkbox"/> CertainTeed XT25 Hip Length	53.00	\$11,925.00	3	\$225.00	9%
<input type="checkbox"/> CertainTeed XT25 Ridge Length	2.00	\$15.00	2	\$7.50	0%
<input type="checkbox"/> CertainTeed XT25 Roof Shingles	62.00	\$17,610.00	3	\$265.00	11%
<input type="checkbox"/> Doors	2.00	\$100.00	2	\$50.00	0%
<input type="checkbox"/> Drip Edge	214.00	\$3,638.00	3	\$17.00	36%
<input type="checkbox"/> Grab Bar /Towel Bars Combo Pack	2.00	\$499.98	2	\$249.99	0%
<input type="checkbox"/> Service	1.00	\$75.00	1	\$75.00	0%
<input type="checkbox"/> Siding	136.00	\$16,450.00	4	-\$12.50	23%
<input type="checkbox"/> Sink/Vanity Replacement	1.00	\$899.99	1	\$899.99	0%
<input type="checkbox"/> Toilet Replacement	2.00	\$1,249.98	2	\$624.99	0%
<input type="checkbox"/> Tub/Shower Replacement	3.00	\$13,799.97	3	\$4,599.99	1%
<input type="checkbox"/> Windows	18.00	\$43,750.00	2	\$2,375.00	3%
<b>Total</b>	590.00	\$146,356.62	36	\$699.80	


## #10 Projects with Project Costs

Grouped by Project Number, this Summary report displays the Project Cost totals for each project as well as calculated Margin based on Total Project Costs.

Report: Projects with Project Costs								
<b>Projects with Project Costs</b>								
Total Records	Total Balance Due	Total Sale Amount	Total Total Project Costs	Total Project Price	Margin %			
2	\$3,600.00	\$7,210.00	\$1,120.00	\$7,200.00	84.5%			
<input type="checkbox"/> Project Name ↑	Type ↑	Project Cost Name	Balance Due	Sale Amount	Total Project Costs	Project Price	fx Margin %	
<input type="checkbox"/> PRJ-13027 (1)	Commission (1)	PC-00294	\$3,550.00	\$7,100.00	\$1,100.00	\$7,100.00	-	
	<b>Subtotal</b>		\$3,550.00	\$7,100.00	\$1,100.00	\$7,100.00	84.5%	
<b>Subtotal</b>			\$3,550.00	\$7,100.00	\$1,100.00	\$7,100.00	84.5%	
<input type="checkbox"/> PRJ-13029 (1)	Subcontractor Materials (1)	PC-00295	\$50.00	\$110.00	\$20.00	\$100.00	-	
	<b>Subtotal</b>		\$50.00	\$110.00	\$20.00	\$100.00	81.8%	
<b>Subtotal</b>			\$50.00	\$110.00	\$20.00	\$100.00	81.8%	
<b>Total (2)</b>			\$3,600.00	\$7,210.00	\$1,120.00	\$7,200.00	84.5%	

## #11 Sales Efficiency by Rep


This Summary style report shows the number of Sales Appointments which reach Rep was Issued, Demoed and how many they Sold. Includes the Original Sold Price and the Net On date.

 Report: Sales Appointments with w/o Sales <b>Sales Efficiency by Rep</b>								
<input type="checkbox"/> Sales Rep 1: Staff Name ↑	Sales Appointment Name	Sale Name	Set	Issued	Demoed	Sold	Original Sold Price	Net On
	SA-59541	S-08699	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$11,099.94	-
	SA-59558	-	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	-	-
	SA-59553	-	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	-	-
	SA-59540	-	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	-	-
<b>Subtotal</b>			7	4	4	4	\$51,159.94	
<input type="checkbox"/> Cecil Sales (1)	SA-59563	-	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	-	-
<b>Subtotal</b>			1	1	1	0	\$0.00	
<input type="checkbox"/> Olivia Admin (7)	SA-59547	S-08696	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$9,350.00	-
	SA-59561	S-08695	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$29,800.00	8/14/2023
	SA-59564	S-08697	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	-
	SA-59546	S-08698	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$1,654.99	-
	SA-59560	-	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	-	-
	SA-59559	-	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	-	-
	SA-59554	-	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	-	-
<b>Subtotal</b>			7	5	5	4	\$40,804.99	
<input type="checkbox"/> Sammy Sales (1)	SA-59566	S-08692	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$25,634.83	-
<b>Subtotal</b>			1	1	1	1	\$25,634.83	
<input type="checkbox"/> Steven Service (1)	SA-59567	S-08700	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$25,336.87	-
<b>Subtotal</b>			1	1	1	1	\$25,336.87	
<input type="checkbox"/> Sylvia Sales (1)	SA-59548	-	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	-	-
<b>Subtotal</b>			1	1	1	0	\$0.00	
<b>Total (18)</b>			18	13	13	10	\$142,936.63	



## #12 Sales Opportunity Conversion

This Report is a summary of each Lead Source and the inquiries collected from each Lead Source provider along with how many of those inquiries converted to a scheduled Sales Appointment. Based on Lead Source Costs we also display the Cost Per Appointment data in this Report.

 Report: Sales Opportunities  
**Sales Opportunity Conversion**

Total Records	Total Lead Source: Total Cost	Total Has Appointment	Cost Per Appointment	Conversion Percent
33	\$6,400.00	25	\$256.00	75.76%

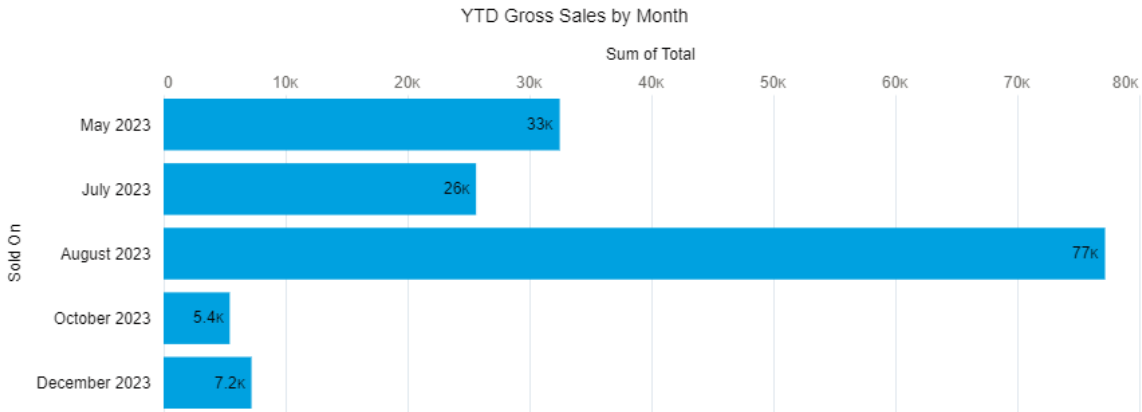
<input type="checkbox"/> Lead Source: Lead Source Name ↑ ▾	Sum of Lead Source: Total Cost	Sum of Has Appointment	Record Count	<i>f</i> x Cost Per Appointment ▾	<i>f</i> x Conversion Percent ▾
<input type="checkbox"/> Billboards	\$1,000.00	3	3	\$333.33	100.00%
<input type="checkbox"/> Company Web Site	\$1,200.00	1	2	\$1,200.00	50.00%
<input type="checkbox"/> Home Depot Store #356	\$1,200.00	8	10	\$150.00	80.00%
<input type="checkbox"/> Internet - Home Advisor	\$2,500.00	3	5	\$833.33	60.00%
<input type="checkbox"/> Referral - Word of Mouth	\$0.00	3	4	\$0.00	75.00%
<input type="checkbox"/> Telemarketing	\$0.00	2	2	\$0.00	100.00%
<input type="checkbox"/> Television	\$0.00	0	1	#Error!	0.00%
<input type="checkbox"/> Truck/Sale Signs	\$500.00	1	1	\$500.00	100.00%
<input type="checkbox"/> Word of Mouth	\$0.00	4	4	\$0.00	100.00%
<input type="checkbox"/> Yellow Pages	\$0.00	0	1	#Error!	0.00%
<b>Total</b>	\$6,400.00	25	33	\$256.00	75.76%

## #13 Sales by Month

This summary style Report is grouped by Calander Month to show gross Sales volume month over month for the current Calendar Year.

Report: Sales **Sales by Month** [Enable Field Editing](#)

Total Records: 11  
Total Total: \$148,011.61



<input type="checkbox"/> Sold On ↑	Account: Account Name	Sale Name	Approved On	Net On	Total
<input type="checkbox"/> May 2023 (1)	Ramon Alvarez	S-08688	7/26/2023	7/26/2023	\$32,500.00
<b>Subtotal</b>					\$32,500.00
<input type="checkbox"/> July 2023 (1)	David Willmington	S-08692	-	-	\$25,634.83
<b>Subtotal</b>					\$25,634.83
<input type="checkbox"/> August 2023 (6)	Towns Property Management, LLC.	S-08696	-	-	\$9,350.00
	Jessica Williams	S-08695	8/14/2023	8/14/2023	\$29,800.00
	Jessica Williams	S-08700	-	-	\$25,336.87
	Darrell Baldwin	S-08699	-	-	\$11,099.94
	David Willmington	S-08697	-	-	\$0.00
	David Willmington	S-08698	-	-	\$1,654.99
<b>Subtotal</b>					\$77,241.80
<input type="checkbox"/> October 2023 (1)	Jolene Backlin	S-08686	10/20/2023	-	\$5,424.98
<b>Subtotal</b>					\$5,424.98
<input type="checkbox"/> December 2023 (2)	Mary Greever	S-08685	12/18/2023	12/18/2023	\$7,100.00
	Mary Greever	S-08687	12/19/2023	-	\$110.00
<b>Subtotal</b>					\$7,210.00
<b>Total (11)</b>					\$148,011.61

## #14 Sales by Month by Rep YTD

This matrix style Report is grouped by Sales Rep 1 and by Calander Month to show gross Sales volume month over month for each of your Sales Reps, for the current Calendar Year.



Report: Sales

### Sales by Month by Rep YTD

Total Records    Total Original Sold Price  
 11                    \$142,936.63

Sales Rep 1: Staff Name	Sold On	May 2023	July 2023	August 2023	October 2023	December 2023	Total
<input type="checkbox"/> -	Sum of Original Sold Price Record Count	\$32,500.00 1	\$0.00 0	\$11,099.94 1	\$0.00 1	\$7,560.00 2	\$51,159.94 5
<input type="checkbox"/> Olivia Admin	Sum of Original Sold Price Record Count	\$0.00 0	\$0.00 0	\$40,804.99 4	\$0.00 0	\$0.00 0	\$40,804.99 4
<input type="checkbox"/> Sammy Sales	Sum of Original Sold Price Record Count	\$0.00 0	\$25,634.83 1	\$0.00 0	\$0.00 0	\$0.00 0	\$25,634.83 1
<input type="checkbox"/> Steven Service	Sum of Original Sold Price Record Count	\$0.00 0	\$0.00 0	\$25,336.87 1	\$0.00 0	\$0.00 0	\$25,336.87 1
<b>Total</b>	Sum of Original Sold Price Record Count	\$32,500.00 1	\$25,634.83 1	\$77,241.80 6	\$0.00 1	\$7,560.00 2	\$142,936.63 11

## #15 Source Cost Performance

This joined style Report is grouped by Lead Source name and includes the number of inquiries from each Lead Source provider as well as the number of Sales Appointments and Sales which resulted from the inquiries.

 Joined Report  
**Source Cost Performance**

Lead Sources with Sales Opps with w/o Sales Appts Lead Sources with Sales Opps wit block 1							
Lead Source Name ↑	Sum of Sales Appointment: Set	Sum of Sales Appointment: Canceled	Sum of Sales Appointment: Issued	Sum of Sales Appointment: Demoed	Sum of Sold	Sum of Sale Total	Record Count
Billboards	3	0	2	2	1	\$110.00	4
Company Web Site	0	0	0	0	1	\$0.00	2
Home Depot Store #356	4	0	4	4	8	\$52,626.69	10
Internet - Home Advisor	7	4	2	2	3	\$62,300.00	9
Referral - Word of Mouth	4	0	4	4	2	\$41,850.00	5
Telemarketing	1	0	0	0	0	\$0.00	2
Television	0	0	0	0	0	\$0.00	1
Truck/Sale Signs	1	0	1	1	1	\$7,100.00	1
Word of Mouth	2	0	1	1	1	\$11,099.94	4
Yellow Pages	0	0	0	0	1	\$5,424.98	1
<b>Total</b>	<b>21</b>	<b>4</b>	<b>13</b>	<b>13</b>	<b>18</b>	<b>\$180,511.61</b>	<b>39</b>

Lead Sources with Lead Source Costs Lead Sources with Lead Source Co block 1						
Sum of Amount	Record Count	fx Cost per Sale	fx ROI	fx Cost per Lead	fx Cost per Demo	fx Cost per Issue
\$1,000.00	1	\$1,000.00	-94.00%	\$250.00	\$500.00	\$500.00
\$1,200.00	1	\$1,200.00	-100.00%	\$600.00	\$0.00	\$0.00
\$1,200.00	2	\$150.00	4,285.56%	\$120.00	\$300.00	\$300.00
\$2,500.00	1	\$833.33	2,392.00%	\$277.78	\$1,250.00	\$1,250.00
-	-	-	-	-	-	-
-	-	\$0.00	-	-	\$0.00	\$0.00
-	-	\$0.00	-	-	\$0.00	\$0.00
\$500.00	1	\$500.00	1,400.00%	\$500.00	\$500.00	\$500.00
-	-	-	-	-	-	-
-	-	-	-	-	\$0.00	\$0.00
<b>\$6,400.00</b>	<b>6</b>	<b>\$355.56</b>	<b>2,133.38%</b>	<b>\$164.10</b>	<b>\$492.31</b>	<b>\$492.31</b>

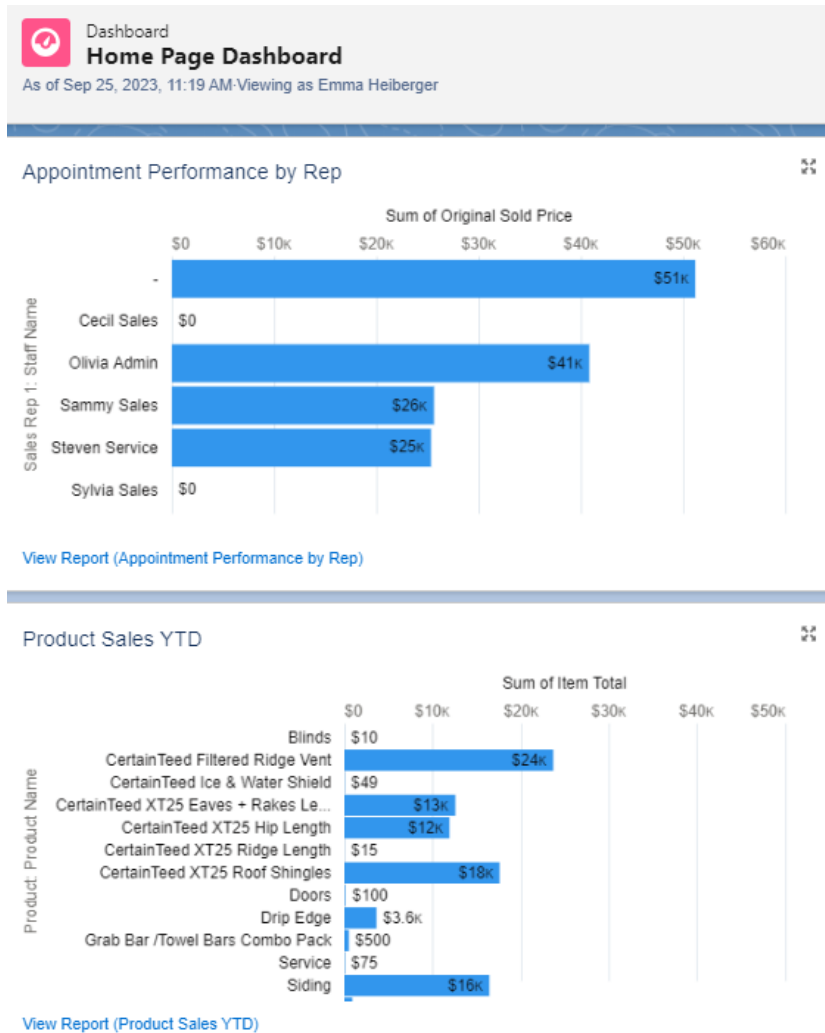
The second block of this Report shows the Sum of Lead Source Costs for the specified Date Range and includes the Return on Investment, Cost per Lead, Cost per Issued appointment, and Cost per Sale for each Lead Source.

## Home Page Dashboard

improveit 360 comes with one out of the box Dashboard. Each organization will likely want to create their own Dashboards specific to the metrics their team needs visibility of.

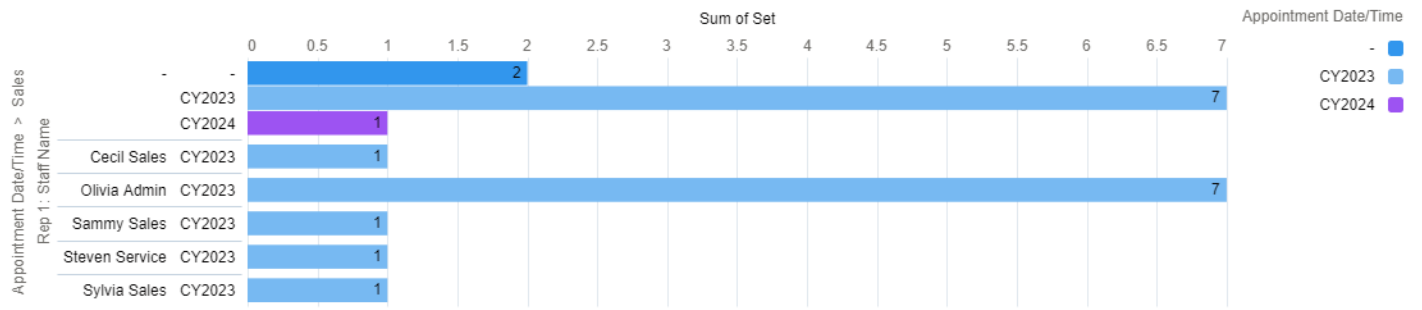
The Home Page Dashboard is comprised of Four (4) Reports:

- Appointment Performance by Rep
- Product Sales YTD
- Appointment Performance Year over Year and
- Sales by Month by Rep YTD



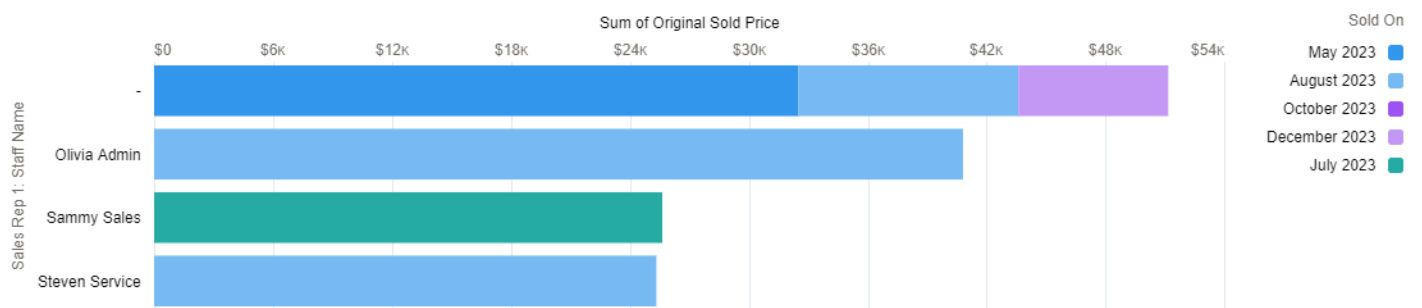
This dashboard's components are continued on the next page...

### Appointment Performance Year over Year



[View Report \(Appointment Performance Year over Year\)](#)

### Sales by Month by Rep YTD



[View Report \(Sales by Month by Rep YTD\)](#)