

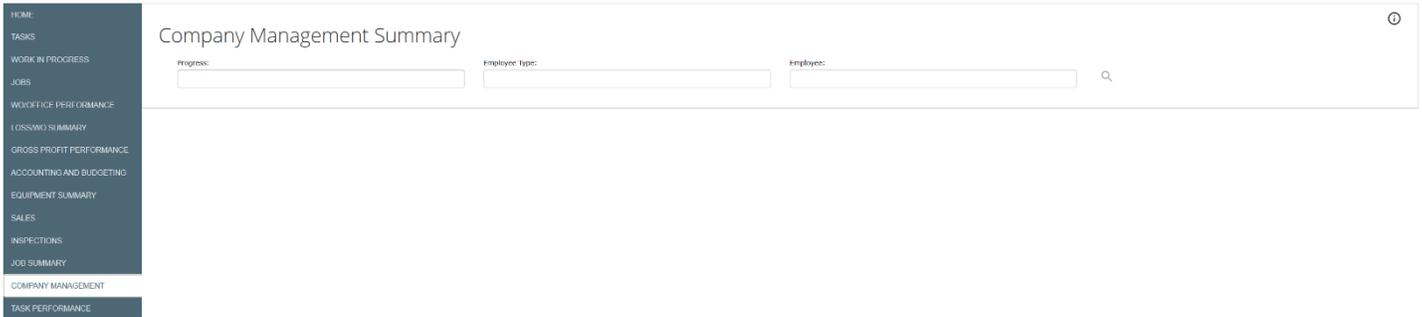


## Company Management Dashboard

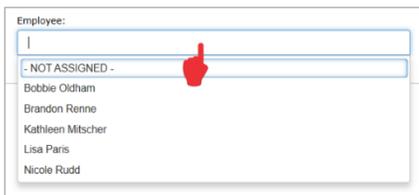
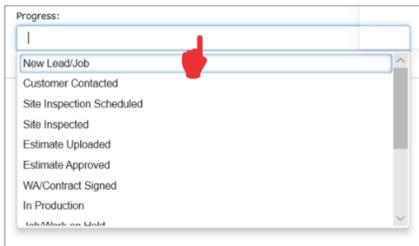
This document will provide you with a more detailed understanding of the dashboards and the required information for an accurate population of information on the dashboards. Each dashboard panel has an information icon, this is provided on each panel with a description of what is included on the displayed panel. Additional icons will be provided to the user on select dashboards, hover over the icon to display the definition the icon function. Click on the icons to perform the action or function. **\*\*Employee Permissions will apply with the function/action of icons such as Print and Export. The Administrator manages these permissions within the Employee information in your database. Employee Permissions are located at Settings→ System Setup→ Employee, Permissions.**

### Company Management Dashboard

This dashboard shows a summary of all active jobs to determine if they are on time and on budget. It give a summary of each job and allows the user to drill down to each set of Work Orders Budget, Actual, Start Time, End Time and whether they are on time.



Click inside the select field to choose Progress, Employee Type and Employee, tap on each selected Progress, Employee Type and Employee to include in the field for search. The user has the ability to select more than one in each field and to save the chosen search. To save selections, check Save Grid Preferences.





## Company Management Dashboard

Once the selections are complete tap the Search icon(🔍), the search results will be displayed.

Program: **Production** | Job Completed: **Prod in Full - File Closed** | Employee Type: **Project Mgr** | Estimator: **Estimator** | Employee: **Lisa Patis** | **Kathleen Mitscher** 🔍

Save Grid Search Preferences? (uncheck for defaults)

Employee	Total # of Jobs	Total Estimate	Average Estimate	Total Budget	Total Actual Exp.	Over/Under Budget %	% On Time	Total Tasks	Completed Tasks	Overdue Tasks	Future
Lisa Patis	4	\$260,583.38	\$70,145.84	\$184,065.65	\$62,019.50	-66%	10%	0	1	2	3
Kathleen Mitscher	5	\$102,735.01	\$20,547.00	\$83,865.42	\$0.00		17%	4	3	1	0

1 - 2 of 2 items

To drill further into results click on the desired employee once, this will display the employees jobs included in the search results.

Job #	# of WOs	Company	Address	Total Estimate	Total Budget	Total Actual Exp.	Over/Under Budget %	% On Time	Total Tasks	Completed Tasks	Overdue Tasks	Future Tasks
<a href="#">WO19-0615-012</a>	2	Affiliate Insurance Agency	13999 E. 14, Laramie, IL 62812 United States	\$1,693.29	\$749.00	\$460.00	-66%	0%	0	0	0	0
<a href="#">WO19-0615-016</a>	16	Affiliate Insurance Corporate	13999 E. 14, Laramie, IL 62812 United States	\$140,956.10	\$127,824.83	\$35,000.00	-71%	0%	5	0	2	3
<a href="#">WO19-0615-018</a>	7	Affiliate Insurance Agency	13999 E. 14, Laramie, IL 62812 United States	\$1,968.80	\$1,750.00	\$950.00	-46%	43%	0	0	0	0
<a href="#">WO20-0616-001</a>	5	SelfHubs Pay	18400 37, Dk, IL 62830 United States	\$132,636.98	\$62,789.82	\$20,089.50	80%	0%	1	1	6	0

1 - 4 of 4 items

Click on the Job # to review Work Orders included in the Job.

Job #	# of WOs	Company	Address	Total Estimate	Total Budget	Total Actual Exp.	Over/Under Budget %	% On Time	Total Tasks	Completed Tasks	Overdue Tasks	Future Tasks
<a href="#">WO19-0615-012</a>	2	Affiliate Insurance Agency	13999 E. 14, Laramie, IL 62812 United States	\$1,693.29	\$749.00	\$460.00	-66%	0%	0	0	0	0
<a href="#">WO19-0615-016</a>	16	Affiliate Insurance Corporate	13999 E. 14, Laramie, IL 62812 United States	\$140,956.10	\$127,824.83	\$35,000.00	-71%	0%	5	0	2	3
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<a href="#">WO20-0616-001</a>	5	SelfHubs Pay	18400 37, Dk, IL 62830 United States	\$132,636.98	\$62,789.82	\$20,089.50	80%	0%	1	1	6	0

1 - 4 of 4 items

Click on the WO Number to open Work Order to adjust and/or manage.

WO Number	Sub/Tech	Category	Budget	% of Total Budget	Start Date	Find Date	Due Date	On Time
<a href="#">WO1905001</a>	Cribbe Debris Disposal	CLN-Cleaning			04/16/2020		04/16/2020	NO
<a href="#">WO1905002</a>	Cribbe Debris Disposal	DND-Debris Disposal	\$749.00	100%	04/24/2020		04/27/2020	NO

1 - 3 of 3 items