

## Job Summary 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.***

### Job Summary Dashboard

#### Job Summary by Employee

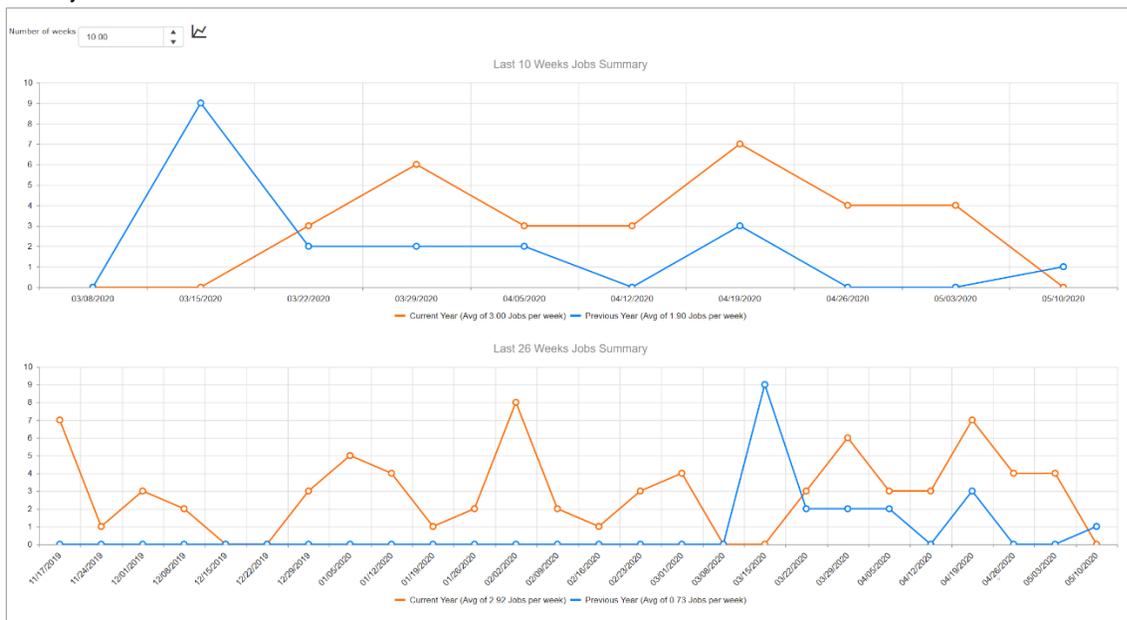
This dashboard allows the user to select employees and their type and view the number of jobs that employee has for each progress level.

Select the Employee and Employee Type from dropdowns. ***\*\*These dropdowns are created and managed by the Administrator. Employees are located at Settings→ System Setup→ Employees, Employee Type is located at Settings→ System Setup→ Settings, Titles/Positions***

Job Summary by Employee		
Select employees: <input type="text" value="Please select"/>	(max # employees)	employee type: <input type="text" value="All"/>
<b>Progress</b>	<b>All</b>	<b>Like Parts</b>
New Lead/Job	45	1
Customer Contacted	43	5
Site Inspection Scheduled	2	1
Site Inspected	12	0
Estimate Uploaded	2	2
Estimate Approved	1	0
WAW Contract Signed	9	0
In Production	12	5
Job/Work on Hold	0	0
Job Completed	1	0
Invoiced	2	2
Collection/legal	0	0
Paid in Full - File Closed	6	2
Warranty Agreement	1	0
Job Not Sold	2	0

#### Job Summary Charts

This dashboard provides the user a chart that summarizes the number of jobs by Date Opened with the number of weeks configurable up to one year.





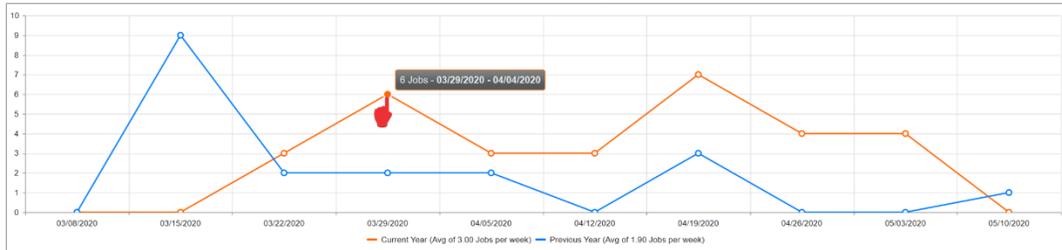
## Job Summary Dashboard

Click on the Number of weeks arrow up to add, arrow down to decrease the number to include in the chart below. Once the number is in place click on the Chart icon to update the information in the Chart. *Note: The Last 26 Weeks Job Summary chart does not have the ability to change the number of weeks to include, it will remain at the twenty-six weeks.*

Number of weeks  ▲ ▼

Number of weeks  ▲ ▼

Hover or click on the graph points to display information included in the chart.



The user has the option to hover over Current or Previous Year to identify on the chart or to remove the Current/Previous Year from the chart by clicking on the selection. To bring the item back to the chart click once again on the selection.

