



## Work In Progress 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.***

### Work In Progress

This dashboard shows the financials for all Work In Progress, the Job requirements for this are as follows:

1. Job Progress must be defined as In Production ***\*\*Definition of progresses can be located by the Administrator at Settings→ System Setup→ Settings, Loss Types.***
2. An estimate value must be greater than zero in the Financials' Estimate column.
3. WA/Contract Signed date must be included in the Job Snapshot, there must *not* be a Date Closed date in the Job Snapshot of the job.

ESTIMATOR	PROJECT MGR	OFFICE	LOSS TYPE	Estimator	# of Jobs	Avg Estimate / Job	Estimate	Budget	Actual Exp.	% Complete	Backlog	Invoiced	Over/Under	Payment Rcvd
				Lisa Paris	2	\$136,496.09	\$272,992.18	\$127,074.83	\$35,000.00	27.54 %	\$197,810.13	\$11,256.98	\$63,925.06	\$0.00
				Dawn Bryant	4	\$42,671.77	\$170,687.08	\$92,156.34	\$4,541.66	4.92 %	\$162,289.28	\$164,338.22	(\$155,940.42)	\$18,641.47
				Kathleen Mitscher	2	\$3,795.60	\$7,591.20	\$10,490.00	\$1,839.50	17.53 %	\$6,260.46	\$0.00	\$1,330.74	\$0.00
<b>Totals:</b>					8	\$56,408.81	\$451,270.46	\$229,721.17	\$41,381.16	18.01 %	\$369,980.19	\$175,595.21	(\$90,684.62)	\$18,641.47

Click on an employee under Estimator or Project Manager tab to view Jobs included in the information provided.

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The job information will display at the bottom of the screen for the users' convenience.

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
M02R-2020-215	10	Allstate Insurance Corporation	19066 IL JH Benton IL 62812 United States	\$140,856.10	\$127,021.03	\$35,000.00	73 %	0 %	0	0	0	0
M02R-1996-999	5	SubPrime Pay	Illinois 27, Chic. IL 60601 United States	\$132,036.68	\$63,730.82	\$35,609.50	49 %	0 %	0	0	0	0

The user has the ability to sort/filter each column, click on the Filter icon to set filter selection.

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Click the underlined job number to open the Job.

Job #
<a href="#">MW19-0005-MLO</a>
<a href="#">MW19-0005-SFR</a>
<a href="#">MW19-0005-INTL</a>
<a href="#">MW20-0008-PRM</a>

The Office tab provides the user with the Offices included in the calculation of the Estimator, Project Manager and Loss Types.

ESTIMATOR	PROJECT MGR	OFFICE	LOSS TYPE	# of Jobs	Avg Estimate / Job	Estimate	Budget	Actual Exp.	% Complete	Backlog	Invoiced	Over/Under	Payment Rcvd
Office													
MidWest Construction				4	\$19,145.84	\$280,863.38	\$137,164.83	\$30,829.50	26.77 %	\$209,471.21	\$11,256.88	\$63,856.78	\$0.00
Sunshine Restoration				4	\$42,671.77	\$110,887.88	\$62,136.34	\$4,941.66	4.92 %	\$102,289.28	\$164,338.22	-\$105,940.42	\$12,941.47

To select only one Office to view only, click on the underlined Office name, this will exit all offices except the one you have selected.

Office
<a href="#">MidWest Construction</a>
<a href="#">Sunshine Restoration</a>

The Loss Type tab provides the user with the list of loss types that are included in the calculation.

ESTIMATOR	PROJECT MGR	OFFICE	LOSS TYPE	Loss Type	# of Jobs	Avg Estimate / Job	Estimate	Budget	Actual Exp.	% Complete	Backlog	Invoiced	Over/Under	Payment Rcvd
				Fire	3	\$51,718.28	\$155,154.87	\$83,818.90	(\$130,000)	-0.15 %	\$155,387.80	\$148,806.01	(\$149,038.75)	\$5,109.26
				Reconstruction	1	\$140,956.10	\$140,956.10	\$127,074.83	\$35,000.00	27.94 %	\$102,136.79	\$11,256.88	\$27,592.33	\$0.00
				Remodeling	1	\$132,036.08	\$132,036.08	\$0.00	\$0.00	0.00 %	\$0.00	\$0.00	\$0.00	\$0.00
				Water	2	\$10,760.11	\$21,520.21	\$18,089.44	\$5,821.66	32.18 %	\$14,595.01	\$15,532.21	(\$8,607.01)	\$13,532.21
				Mold	1	\$1,603.20	\$1,603.20	\$740.00	\$889.50	83.17 %	\$109.50	\$0.00	\$1,463.70	\$0.00

Select a Loss Type to view the jobs included in the calculations.

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				Reconstruction	1	\$140,956.10	\$140,956.10	\$127,074.83	\$35,000.00	27.94 %	\$102,136.79	\$11,256.88	\$27,592.33	\$0.00
				Remodeling	1	\$132,036.08	\$132,036.08	\$0.00	\$0.00	0.00 %	\$0.00	\$0.00	\$0.00	\$0.00
				Water	2	\$10,760.11	\$21,520.21	\$18,089.44	\$5,821.66	32.18 %	\$14,595.01	\$15,532.21	(\$8,607.01)	\$13,532.21
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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="#">Z0001E</a>	1	USA	2545 West Loring Pkwy, Ft. Lauderdale, FL 33309	\$41,727.01	\$382.32	\$0.00	0%	0%	0	0	0	0
<a href="#">Z0001E</a>	3	Underwrite Insurance	3855 S.W. 22nd St, Ft. Lauderdale, FL 33304	\$40,109.26	\$21,265.14	(\$130,850)	100%	0%	0	0	0	0
<a href="#">Z0001E</a>	5	Corporate Insurance	5187 S.W. 22nd St, Ft. Lauderdale, FL 33309	\$48,317.80	\$45,567.81	\$0.00	0%	0%	0	0	0	0

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<a href="#">Z0001E</a>	3	Underwrite Insurance	3855 S.W. 22nd St, Ft. Lauderdale, FL 33304	\$40,109.26	\$21,265.14	(\$130,850)	100%	0%	0	0	0	0
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