

## BN Reports

### Leads, Bids and Sales Sources Report

*Note: Inactive jobs will populate*

#### Report Columns

1. **ORIGINS:** Referred By
2. **# of Leads:** Received jobs within the Report to Date applied
3. **# of Bids:** for the data to populate within this field the Estimate Complete date (Date Estimate Delivered) must be applied to the job.
4. **# of Sales:** for the data to populate within this field the WA/Contract Signed date (Date Estimate Accepted) must be applied to the job.
5. **\$ Volume of Bids:** Total Estimate
6. **\$ Volume of Sales:** Total Estimate
7. **Ad / Mrkt. \$ Spent:** *nothing populates in this field*

Job Snapshot the dates highlighted below are the dates referenced above i.e., Estimate Complete (Date Estimate Delivered) and WA/Contract Signed (Date Estimate Accepted).

**Job Snapshot**

Update Loss 1094  
975 3rd St S, Jacksonville Beach, FL 32250

Job Progress: Job Completed

Loss Type: Reconstruction

Cause of Loss Type:

XA ID#:

Date of Loss: 01/08/2021 03:00 PM

Date Received: 01/08/2021 03:00 PM

Assignment Received Date:

Customer Contacted: 1/8/2021 3:00 PM

Site Inspection Appt Start: 01/13/2021 01:00 PM

Site Inspection Appt End: 01/13/2021 03:00 PM

By: Dawn Bryant

Site Inspected: 01/13/2021 01:00 PM

**Estimate Complete: 01/18/2021 09:00 AM**

Estimate Approved:

**WA/Contract Signed: 01/29/2021 12:30 PM**

Notes:

Target Start Date:

Target Completion: 03/12/2021 04:00 PM

Job Started Start: 2/4/2021 9:00 AM

Job Started End: 3/12/2021 4:00 PM

Drying Started:

Drying Completed:

Job Completed: 03/08/2021 09:27 AM

Date Closed: 04/21/2021 02:00 PM

Job Not Sold:

Custom Date Here:

The administrator of the application can add/edit Referred By descriptions by going to Settings → System Setup → Settings → Other Settings; Referred By

The Referred By field can be populated within the Lead Entry Page or within the Job → Additional Contacts.

#### Lead Entry Page

**Sources**

Company:

Billing Contact:

Contact:

Reported By:

**Referred By:**

Source of Referral:

Agent:

#### Job → Additional Contacts

Detail | Job Contacts (2) | **Additional Contacts (4)** | Losses (1) | Sched

**Additional Contacts:**

Reported By:

**Referred By: Plumber**

Contact Type	Name	Company
Adjuster	Ashley Stewart	State Farm
Agent	Mary Grace Bradley	State Farm/Alan Jackson
Source of Referral	Jackson Plumbing & More	Jackson Plumbing & More



## BN Reports

The Marketing Report (Reports→ Marketing→ Marketing) is a great report to use to tie out the information populated within the Leads, Bids and Sales Sources Report.

**To tie out # of Leads associated with an Origin (Referred By) apply the following criteria within the Marketing Report.**

1. Job Status: Include All
2. Date: Date Received → Current Year
3. Report Subtotal: Company ID
4. Output: Data Export

Tip: After the data exports sort by Referred By

**To tie out # of Bids and \$ Volume of Bids associated with an Origin (Referred By) apply the following criteria within the Marketing Report.**

1. Status: Include All
2. Date: Estimate Uploaded → Current Year
3. Report Subtotal: Company ID
4. Output: Data Export

Tip: After the data exports remove all Estimates that equal zero dollars then sort by Referred By

**To tie out # of Sales and \$ Volume of Sales associated with an Origin (Referred By) select the following criteria within the Marketing Report.**

1. Job Status: Include All
2. Date: WA/Contract Signed → Current Year
3. Report Subtotal: Company ID
4. Output: Data Export

Tip: After the data exports remove all Estimates that equal zero dollars then sort by Referred By

### Other Report Resources:

**Job Aging with Gross Profit Analysis Report:** Reports→ Jobs→ Job Aging with Gross Profit Analysis  
*This is a great report to ensure the required date fields and Estimates have been populated.*

**Company Recap:** Reports→ Production→ Company Recap (√ Hide Detail to generate the Summary Report)  
**Note:** Largest dollar amount, **paid in full** (Equals the Job Progress marked as closed) jobs. Smallest dollar amount, **paid in full** (Equals the Job Progress marked as closed) jobs.

### Types of Jobs Sold Report:

**Note:** Inactive jobs will populate

### Report Columns

1. **Commercial, Residential, etc:** Property Type (Job Type)  
The administrator of the application can add/edit Property Type descriptions by going to Settings→ System Setup→ Settings→ Job Settings; Property Types
2. **# of Sales (Current Year):** for the data to populate within this field the WA/Contract Signed date (Date Estimate Accepted) must be applied to the job.
3. **\$ Volume (Current Year):** Total Estimate
4. **# of Sales (Previous Year):** for the data to populate within this field the WA/Contract Signed date (Date Estimate Accepted) must be applied to the job.
5. **\$ Volume (Previous Year):** Total Estimate