

# Job Profit/Loss

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The Job Profit/Loss Report is designed to print a listing of Jobs displaying the total Install charges, the total costs for each Job broken down by Parts, Labor, Overhead, Commissions and Other costs, and the amount of profit or loss for the Job. The last column of the report is the total RMR for the Job. If a Job has not been closed, the Install Charges amounts displayed may or may not have been invoiced; these are the total Install and Part Charges setup on the Job.

This report may be generated for Jobs with a Sold Date within a particular Date Range or Jobs Completed within a particular Date Range or a combination of the two date options. A Detail or Summary style report may be generated depending on the choice made in *Option* field of the Report Selections.

Once the desired options have been selected on the report options form, click the OK button to display the report in Print Preview mode.

## Report Selections

**Department** - The default is to display data for All Departments. If the data for only certain Departments is desired, you may highlight the first Department, then depress the CTRL key and highlight additional Departments within the list.

**Salesperson** - The default is to display data for All Salespersons. If the data for only certain Salespersons is desired, you may highlight the first Salesperson, then depress the CTRL key and highlight additional Salespersons within the list.

**Project Manager** - The default is to display data for All Project Managers. If the data for only certain Project Managers is desired, you may highlight the first Project Manager name, then depress the CTRL key and highlight additional Project Manager names within the list. The Project Manger is selected on the Job Work Order form.

**Date Ranges** - you may select a Sold Date Range only, a Completed Date Range only or dates in both selection areas.

- **Sold Date** - This option will default to the current month date range. If a different date range is desired you may change the From and To Dates. This report searches on the Sold Date field entered on the Job Work Order form.

- **Completed Date** - This option will default to the current month date range. If a different date range is desired you may change the From and To Dates. This report searches on the Job End Date that was entered by a User when the Job was closed.

**Job Type** - The report default is all Job Types. you may select a single Job Type from the drop-down list if desired.

**Sort** - The report default is to sort by Site Name. Other Sorting options available are Salesperson and Job Type.

**Options - Show Each Job (Don't Show Summary)** - Selecting this option will print the Detail style report; un-checking this option will print the Summary style report.

**Use Original Closed Date** - If a Job was re-opened and then closed using a different date than the date on which it was originally closed, the report will default to the most recent closed date. Check this option if you want the report to use the date on which the Job was originally closed.

**Group by Branch** - Selecting this option will group the information by each unique Branch.

**Include Salesperson on Each Line** - Selecting this option will print the Salesperson's name on each row of the report; this option is commonly selected if you plan on exporting the report to excel for sorting and grouping of the information.

**S Job Profit/Loss** [X]

**Department**

- All
- Accounting
- Administration
- Installation
- Sales New
- Salesx
- Service

**Salesperson**

- All
- Oliver Blais
- Bill Carroll
- Devan Clements
- Donald Drake

**Project Manager**

- All
- Bill Carroll
- Donald Drake
- Don Faybrick
- Alexis Johnson

**Sold Date**

Sold From: [ ] Sold To: [ ]

**Job Type**

All

**Completed Date**

Completed From: 4/1/2018 Completed To: 4/30/2018

**Sort**

Site Name

**Options**

Show Each Job (Don't Show Summary)  Group By Branch

Use Original Closed Date  Include Salesperson on Each Line

[Ok] [Cancel]