

Jobs Sold Summary

Last Modified on 01/31/2024 1:11 pm EST

The Jobs Sold Summary Report will print totals broken out into the following columns: · Install Charges plus and Part Charges

- RMR Amount
- RAR Amount (RMR x 12)

This report may be generated using one of the following options:

- All Jobs where the Sold Date is within a particular date range.
 - All Jobs where the Approval Date is within a particular date range. Selecting this option will only produce a report if your company is activated and is using Job Approvals. [Click here for more information on the Job Approvals feature.](#)

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

Date - One of the following options must be selected. The date range will default to the current month beginning and ending dates.

- *Sold Date* - If this option is selected, the report searches on the Sold Date field entered on the Job Work Order form.
- *Approval Date* - If this option is selected, Jobs that were approved for processing within the specified date range will display on the report. This option is only used if your company is using the Job Approvals feature.

Current Job Status - The report default is all Job Statuses. If the data for only certain Job Statuses is desired, click the Invert Selection button, then check the box to the left of each Job Status to be included in the report results.

- *Hide Inactive Job Statuses* - If data is not to be listed for inactive Job Statuses, select this option.

Branches - The report default is to print data for all active Branches. If it is desired to print the data associated with one or multiple Branches, you may select the checkbox to the left of each branch desired.

- *Hide Inactive Branches* - If data is not to be listed for inactive Branches, select this option.

Job Types - The report default is all Job Types. If the data for only certain Job Types is desired, click the Invert Selection button, then check the box to the left of each Job Type to be included in the report results.

- *Hide Inactive Job Types* - If data is not to be listed for inactive Job Types, select this option.

Install Companies - The report default is all Install Companies. If the data for only certain Install Companies is desired, click the Invert Selection button, then check the box to the left of each Install Company to be included in the report results.

- *Hide Inactive Companies* - If data is not to be listed for inactive Install Companies, select this option.

Department - The report default is all Departments. If the data for only certain Departments is desired, click the Invert Selection button, then check the box to the left of each Department to be included in the report results.

- *Hide Inactive Departments* - If data is not to be listed for inactive Installers, select this option.

Salespersons - The report default is all Salespersons. If the data for only certain Salespersons is desired, click the Invert Selection button, then check the box to the left of each Salesperson to be included in the report results.

- *Hide Inactive Salespeople* - If data is not to be listed for inactive Salespersons, select this option.

Group By - The report default is to group by None. Selecting a Group By option will print totals a Group Header and totals at the end of each Group. Grouping options available are Department, Install Company, Installer, Job Status, Job Type, and Salesperson. If the Group by is left as None, totals will print for each unique Branch.

Jobs Sold Summary [X]

Date
 Sold Date Approval Date
From: [2/1/2018] [Calendar]
Thru: [4/30/2018] [Calendar]

Current Job Status
 Activation
 Change Order
 Closed
 CO Approval
 Fliggle
 In-Progress
 Hide Inactive Job Statuses
[Select All] [Invert Selection]

Branches
 A1
 MI
 OH
 Hide Inactive Branches
[Select All] [Invert Selection]

Job Types
 ACC-Com
 ACC-Com Percentage
 ACC-Com-Holdback
 ACC-Res
 ACC-Res Parts Price
 ACC-Res_Copy
 Hide Inactive Job Types
[Select All] [Invert Selection]

Install Companies
 A1
 MI
 OH
 Hide Inactive Companies
[Select All] [Invert Selection]

Department
 Accounting
 Administration
 Installation
 Sales New
 Salesx
 Service
 Hide Inactive Department
[Select All] [Invert Selection]

Salespersons
 Show All Employees
 Anne.Miller
 Bill.Carroll
 carolynj
 Devan.Clements
 Donald.Drake
 Hide Inactive Salespeople
[Select All] [Invert Selection]

Group By
Salesperson
 Start group on a new page

[Ok] [Cancel]