Service Commissions

This is a custom report that is designed specifically for a customer's commission policy. It is unlikely that this report will fit the needs of any SedonaOffice user other than the one who requested it. It does not have a printable version. It only exports to Excel.

The report lists all parts and other items on a ticket for each technician that has been dispatched. The Labor Charge and Trip Charge on the Billing Tab of the service tickets each have their own detail line for a selected ticket.

Credits applied to the service ticket are included in this report, but the selection criteria is slightly different.

Note: This is a custom report designed by a particular SedonaOffice customer based upon their specifications. This report cannot be modified and is available for use by all SedonaOffice customers. If the original designer of the report decides to make changes to the report, no notification is provided of any modifications or changes. **Report Selections**

Date Selection – Only service tickets closed on or within the dates selected will be included.

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Credits applied to the service ticket are included in this report, but the selection criteria is slightly different.

Only credits with a credit date on or within the selected date range will be included regardless of when the ticket is closed.

Branches – By default, this list is set to show only active branches. To show all branches in the list, uncheck *Hide Inactive Branches.*

> Only service tickets for sites belonging to the selected branches will be included.

> Only credits on service tickets for sites belonging to the selected branches will be included.

Service Companies – By default, this list is set to show only your active service companies. To show all of your service companies in the list, uncheck *Hide Inactive Service Companies*.

> Only service tickets for the selected service companies will be included.

> Only credits on service tickets for the selected service companies will be included.

Technicians – By default, this list is set to show all technicians who are employees. To show only active employees in the list, check *Hide Inactive Technicians.*

> Only service tickets for the selected technicians will be included. If more than one technician has been dispatched for this ticket, **all technicians** will be listed for this ticket, as long as one of the technicians has been selected.

> The technician selection does not apply to credits. **All credits** meeting the other criteria will be included regardless of the technician on the ticket.

Product Line – By default, this list is set to show all product lines. To show only active product lines in the list, check *Hide Inactive Product Lines.*

> Only service tickets with a part from the selected product lines will be included. **All parts and all items** will be included for these service tickets.

> The Product Line selection does not apply to credits. **All credits** meeting the other criteria will be included regardless of the parts on the ticket.

Export Button – This button exports the data directly to Excel. You are not able to preview the data in the report before you export it. This allows the export to exclude some of the formatting like page breaks and repeating of column headers.

Exported Columns

- Service Company Code
- Service Level Code
  - Cnt Tech – a count of technicians dispatched for this ticket. If the same technician has more than one appointment, that technician is only counted once.
- Tech Code
- Tech Name
- Last Tech
- Invoice/Credit Number
- Invoice/Credit Date
- Ticket Number
- Ticket Creation Date
- Ticket Closed Date
- Part Code – the part code or the invoice item on the ticket/credit
- Part Description – the part description or invoice item description on the ticket/credit
- Qty – the quantity of the part or item on the ticket/credit
- Rate – the unit rate of the part or item on the ticket/credit
- Ext Rate – the quantity * unit rate of the part or item on the ticket/credit
  - Product Line – the product line of the part on the ticket. This will be blank for invoice items and credits.
  - Trip Charge – the trip charge on the ticket. It is the sum of the following values: Trip Charge listed on the Billing tab, a Part on the ticket with a Part Code = 'Trip', and an invoice item on the ticket with an Item Code = 'Trip'. It is repeated for every detail line for each ticket. This will be 0 on credits.
  - Fuel Charge – the fuel charge on the ticket. It is based on an invoice item with an item code = 'Fuel'. It is repeated for every detail line for each ticket. This will be 0 on credits.
  - Invoice/Credit Amount – the invoice amount without tax. It is repeated for every detail line for each ticket. Credits are displayed separately. Each credit will show its own total and are not combined with invoices.
- Branch Code – the branch of the site for each ticket.
- Customer Number
- Customer Name

Service Commission

General

- ○ Accounting Period
- ● Dates

| 12 | 12/1/2017 - 12/31/2017 | 1/1/2018 |
| 12 | 12/1/2017 - 12/31/2017 | 4/30/2018 |

Branches

- ☑ CA
- ☑ MI
- ☑ NA

☑ Hide Inactive Branches

[Select All] [Invert Selection]

Service Companies

- ☑ MI

☑ Hide Inactive Companies

[Select All] [Invert Selection]

Technicians

- ☑ ABC Service ...
- ☑ Alarmists Inc
- ☑ Angela Parker
- ☑ Anne's Servic...
- ☑ Borque Fire
- ☑ Bourque Fire ...

☐ Hide InactiveTechnicians

[Select All] [Invert Selection]

Product Line

- ☑ Access Contr...
- ☑ Batteries
- ☑ Board & Panels
- ☐ Camera Hous...
- ☑ CCTV Equip...
- ☑ Concord Gen...

☐ Hide Inactive Product Lines

[Select All] [Invert Selection]

[Info] [Export] [Cancel]