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Time Log Exception Report

CRM> Reports> Report List

Time Log Exception Report

Debtor From:

Debtor To:

Date From:

2023-04-01

Date To:

2023-04-30

Division:

All

Region:

All

Sales Rep:

Generate

Close

Debtor From	
Date From	
Division	
Sales Rep	
Debtor To	
Date To	
Region	

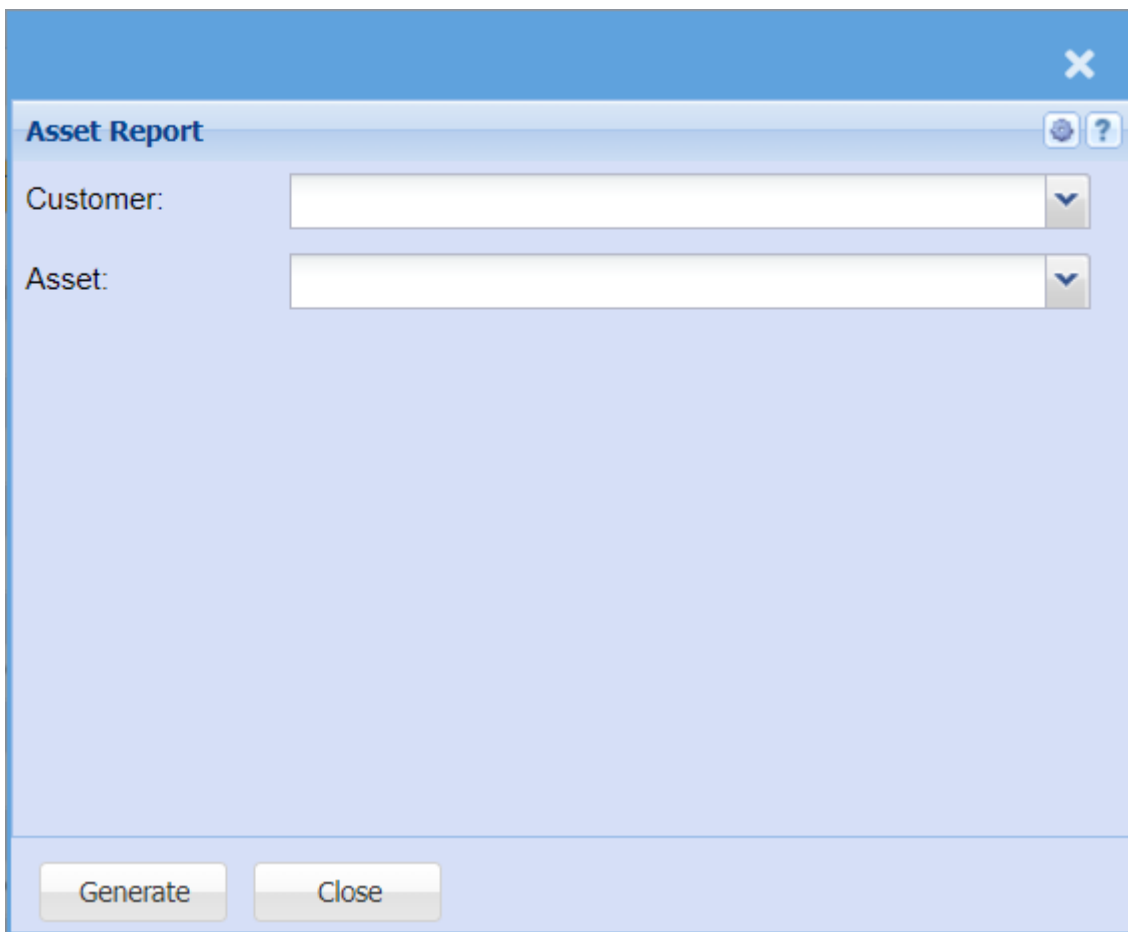
Asset Additional Information Report

CRM> Reports> Report List

This report generates details prior to asset details in terms of what has been implemented on the generic branch table located in system configuration.

The form generates details which are depicted in the table found in system config example make, brand, track it number, serial no, etc.

A list of all items linked to the customer will be generated with the asset item number assigned to each item.



Asset Report

Customer:

Asset:

Customer	
Asset	

Customer Coverage Report

Customer Coverage Report

Customer From:

Customer To:

Date From:

2023-08-01

-

Date To:

2024-02-29

+

Generate

Close

Customer From	
Date From	
Customer To	
Date To	

Debtor Interactions

CRM> Reports> Report List

This report shows all the interactions with Debtors, Prospects or opportunities. This report can be grouped by Debtor, Contact person or interaction type as well as Interaction Status.

Debtor Interactions

Debtor Type:

All

Debtor From:

Debtor To:

Date From:

2023-04-01

-

Date To:

2023-04-30

+

Interaction Type:

All

Interaction Status:

All

Group By:

Debtor

Sort By:

Captured Date Time

Generate

Close

This is a report on the interaction between the user and the customers
To run the report, select from the following fields:

Debtor Type	select the debtor’s type from the drop down arrow
Debtor From	select the debtor from or leave it blank
Debtor To	select the debtor to or leave it blank
Date From	select the date from which the report will run from.
Date To	select the date to which the report will run from.
Interaction Type	select the interaction type from the drop down arrow
Interaction Status	select the interaction status from the drop down arrow

Group By	group the report by selection either a debtor or contact person or interaction
Sort By	sort the report by selecting one option from the drop down arrow

Over and Under Recoveries on Time Sheets

CRM> Reports> Report List

Over and Under Recoveries on Time Sheet Invoices and Credit Notes.

Time Log Over And Under Recovery Report

Debtor / Client From:

Debtor / Client To:

Financial Year From:

Year 4

Financial Year To:

Year 4

Financial Period From:

2023-04-01

Financial Period To:

2023-04-30

Balance By:

☒ Actual Time

☐ Original Time

Document Status:

☒ Processed

☐ Preparation

☐ Both

Generate

Close

Debtor / Client From	
Debtor / Client To	
Financial Year From	
Financial Year To	
Financial Period From	
Financial Period To	
Balance By - Actual Time or Original Time	
Document Status - Processed, Preparation or Both	

Rep Sales Visit Report

CRM> Reports> Report List

This report shows a list of assets linked to a customer

Rep Sales Visit

Follow Up Date:

☐

Customer:

Date From:

2023-04-01

-

Status:

All

Sales Rep:

All

Division:

All

P:

☐

Interaction Type:

All

Reference:

Stage:

All

Route To Market:

All

Quote Number:

Print Acc No:

☐

Employee:

All

Date To:

2023-04-30

+

Lead Type:

All

Lead Status:

All

Region:

All

P:

☐

Probability:

All

Colour Code:

All

Description:

Customer Type:

All

Quote Status:

Generate

Close

Follow Up Date	
Customer	
Date From	
Status	
Sales Rep	
Division	
Interaction Type	
Reference	
Stage	
Route To Market	
Quote Number	
Print Acc No	
Employee	

Date To	
Lead Type	
Lead Status	
Region	
P: Tick	
Probability	
Colour Code	
Description	
Customer Type	
Quote Status	

CRM> Reports> Report List

Follow Up Date	
Debtor	
Date From	
Status	
Sales Rep	
Division	
Interaction Type	
Reference	
Stage	
Route To Market	
Quote Number	
Print Acc No	
Employee	
Date To	

Lead Type	
Lead Status	
Region	
P: Tick	
Probability	
Colour Code	
Description	
Customer Type	
Quote Status	

Sales Force Report

Sales Force Report

User From:

User To:

Date From:

2024-01-06

Date To:

2024-02-05

Generate

Close

User From	
User To	
Date From	
Date To	

CRM> Reports> Report List

Customer	
Date From	
Status	
Sales Rep	
Division	
Interaction Type	
Reference	
Stage	
Route To Market	
Quote Number	
Debtor Category	
Incl Quotes	
Show Totals	
Summary	

Employee	
Date To	
Lead Type	
Lead Status	
Region	
P: Tick	
Probability	
Colour Code	
Description	
Customer Type	
Quote Status	

Support Log Points

CRM> Reports> Report List

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Support Log Points

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?

Assign From:

All

▼

Assign To:

All

▼

Date From:

2023-04-01

📅

-

Date To:

2023-04-30

📅

+

Summary:

☐

Generate

Close

Assign From	
Assign To	
Date From	
Date To	
Summary Tick	

Support Log Statistic Report

CRM> Reports> Report List

This report provides a count of the support logs captured within the Date range specified. Ideally, if all jobs/Call outs are Logged, then this will represent the quantity of Job received within the given date range.

The report can be sorted by Employee or Task

To Generate, double click on the report and enter the required criteria.

Click Generate

Provides statistics on support logs.

Report By: Choose between Employee, Task, Root cause, Status, customer or percentage complete

Support log statistics

Date From:

2023-04-01

Date To:

2023-04-30

Report By:

Employee

Sort By:

Count

Division:

All

Region:

All

Generate

Close

Support Log Summary

CRM> Reports> Report List

This report will provide a summary of all Support logs captured within the specified date range and show a percentage progress or completion of the job. It also shows any Accounted budget time versus actual time spent on the job.

Support Log Summary Report

Assign To From: All

Assign to To: All

Debtor From: All

Debtor To: All

Division: All

P: ☐

Region: All

P: ☐

Select: ☒ All Tasks ☐ Select Tasks

Log Status: All - Exclude Cancelled & Completed

Task: All

Sub-Task: All

Date Type: Due Date

Sort By: Log No.

Date From: 2023-04-01

Date To: 2023-04-30

Show Time Log Detail (Export Only): ☐

Show Invoiced Value: ☐

Show Year End: ☐

Generate

Export

Close

Assign To From	
Debtor From	
Division	
Select	
Task	
Date Type	
Date From	
Show Time Log Detail (Export Only) Tick	
Show Year End Tick	
Assign to To	
Debtor To	
Region	

Log Status	
Sub-Task	
Sort By	
Date To	
Show Invoiced Value Tick	

Support Logs / Time Logs not Invoiced

CRM> Reports> Report List

This report shows the time logs not invoiced or flagged for invoicing

Support Log / Time Log not Invoiced

Select:

☒ Support Logs

☐ Time Logs

Assign To From:

All

Assign to To:

All

Debtor From:

All

Debtor To:

All

Date From:

2023-04-01

Date To:

2023-04-30

Invoice Flag:

All

Sort By:

Log No.

Division:

All

P:

☐

Region:

All

P:

☐

In Warranty:

All

Generate

Close

Select - Support Logs or Time Logs	
Assign To From	
Debtor From	
Date From	
Invoice From	
Invoice Flag	
Division	
In Warranty	
Assign to To	
Debtor To	
Date To	
Sort By	
Region	

Date From	
Employee Log	
Customer From	
In Warranty	
Division	

Group By	
Date To	
Assign To	
Customer To	
Order By	
Region	
Sub Order By	
Select - Action Date, Completion Date, Due Date	
Summary Tick	
Exclude Problem Tick	
Exclude Solution Tick	
Excl Invoiced Tick	
Status:	From the available column, select the ones that will appear on the report by moving them to the right-hand side column.

Time And Attendance Report

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Time And Attendance Report

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User From:▼

User To:▼

Date From:

2024-01-29

📅 ✕ -

Date To:

2024-02-05

📅 ✕ +

Generate

Close

User From	
User To	
Date From	
Date To	

Group By	
Aging Type	
Year Selection	
Current Month	
Date Selection	
Employee	
Division	
Region	
Acct. Manager	
Billing Group	
Travel	

Toll Fees	
Disbursements	
Other	

Time Log Audit as Per Employee

CRM> Reports> Report List

This report provides a summary per employee of all time logs for the given date range. A summary of the individual Time logs is listed. Along with an accumulative summary of Normal Hours Labour, Overtime, Travel and disbursements

Time Log Audit Report

Debtor From:

Date From:

2023-04-01

Employee:

All

Division:

All

Region:

All

Employee Rates:

All

Hours Compare:

40

Show Job No:

Show Rate:

Show Client Name:

Show Disbursement:

Debtor To:

Date To:

2023-04-30

Time Log Type:

All

Acct. Manager:

All

Billing Group:

All

In Warranty:

All

Include Notes:

Incl. Nonbillable:

Show In Warranty:

Show Times:

Show Amounts:

Generate

Close

Debtor From	
Date From	
Employee	
Division	
Region	
Employee Rates	
Hours Compare	
Show Job No Tick	
Show Rate Tick	

Show Client Name Tick	
Show Disbursement Tick	
Debtor To	
Date To	
Time Log Type	
Acct. Manager	
Billing Group	
In Warranty	
Include Notes Tick	
Incl. Nonbillable Tick	
Show In Warranty Tick	
Show Times Tick	
Show Amounts Tick	

Time Log Employee Summary of Hours Logged

CRM> Reports> Report List

This report shows a summary of total hours logged versus Hours Billed, versus required hours. The hours compare field on the criteria is the total hours the employee is required to work.

Time Log Employee Summary Report

Date From:

2023-04-01

-

Date To:

2023-04-30

+

Employee Division:

All

Employee Region:

All

Employee:

All

Time Log Type:

All

Division:

All

Acct. Manager:

All

Region:

All

Billing Group:

All

Hours Compare:

40

Daily:

0

Show Below Hours Compare:

Incl. Nonbillable:

Show Days Detail:

Incl. Job Number:

Show Over Time:

Sort By:

First and Last Name

Show Break:

Generate

Close

Date From	
Employee Division	
Employee	
Division	
Region	
Hours Compare	

Daily	
Incl. Nonbillable Tick	
Incl. Job Number Tick	
Sort By	
Date To	
Employee Region	
Time Log Type	
Acct. Manager	
Billing Group	
Show Below Hours Compare Tick	
Show Days Detail Tick	
Show Over Time Tick	
Show Break Tick	

Time Log Report

CRM> Reports> Report List

The report provides a list of Time Logs either by Debtor or by Employee wherein one can view in summary the detail of all time logs created within the Date range specified. You have the option for the report to include any notes that were captured on the respective Time logs the report also extracts accumulative totals of hours and value of all time logs per employee or per debtor (depending on the sort order)

Time Log Report

Debtor From:

Debtor To:

Date From:

2023-04-01

Date To:

2023-04-30

Sort Order:

Log No

Time Log Type:

All

Employee:

All

Status / Severity:

All

Division:

All

Account Manager:

All

Region:

All

Billing Group:

All

In Warranty:

All

Decimal Places:

0

Group By Employee:

With Notes:

Incl Non-Billable:

Incl Times:

Incl SLA Code:

Incl Potential Rate:

Incl Status:

Incl Warranty:

Hide Additionals:

Hide Add Totals:

Generate

Export

Close

Debtor From	
Date From	
Sort Order	
Employee	
Division	
Region	
In Warranty	
Debtor To	
Date To	

Time Log Type	
Status / Severity	
Account Manager	
Billing Group	
Decimal Places	
Group By Employee Tick	
Incl. Times Tick	
Incl. Status Tick	
Hide Add Totals Tick	
With Notes Tick	
Incl. SLA Code Tick	
Incl. Warranty Tick	
Incl. Non-Billable Tick	
Incl. Potential Rate Tick	
Hide Additional Tick	

Time Log Summary

CRM> Reports> Report List

Provides a list of time logs with specific locations of employee

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Time Log Summary

⚙️ ?

Customer From:

▼

Customer To:

▼

Date From:

2023-04-01

📅 -

Date To:

2023-04-30

📅 +

Employee From:

All

▼

Employee To:

All

▼

Sort By:

Customer Name

▼

Sub Sort By:

Customer Name

▼

Show Reference:

☐

Show Notes:

☐

Show Job No:

☐

Show Job Description:

☐

Generate

Close

Customer From	
Date From	
Employee From	
Sort By	
Show Reference Tick	
Show Job No Tick	
Customer To	
Date To	
Employee To	
Sub Sort By	
Show Notes Tick	
Show Job Description Tick	

Time Log Task Values

CRM> Reports> Report List

Daily/Monthly/etc. Tasks Earnings - Daily/Monthly/etc. tasks that were billed, and amount billed for each of these tasks (so we can see what each task earned for the period)

Time Log Task Values

Employee: All

In Warranty: All

Select: All Tasks

Contract: All

Date From: 2023-04-01

Group By: No Grouping

Sub Group By: No Grouping

Summary: ☐

Debtor: All

Log Status: All - Exclude Cancelled & Archived

Division:

All Tasks: All

Date To: 2023-04-30

Sort By: Log Date

Service Item:

Show Inv. Details: ☐

Include Non-Billable: ☐

Generate

Export

Close

Report Request

Employee	
In Warranty	
Select - All Tasks or Select Contract	
Contract	This will appear if you have selected Contract in the above selection.
Date From	
Group By	
Sub Group By	
Summary Tick	
Debtor	
Log Status	
Division	
All Tasks	This will appear if you have selected All Tasks in the Select section.
Date To	

Sort By	
Service Item	
Show Inv. Details Tick	
Include Non-Billable	

Time Log Transaction

CRM> Reports> Report List

Time Log Transaction

Debtor From:

Debtor To:

Date From:

2023-04-01

Date To:

2023-04-30

Sort By:

Log No

Time Log Type:

All

Employee:

All

Inventory Type:

All

Group By:

None

Decimal Places:

0

Incl Non Billable:

Notes:

Generate

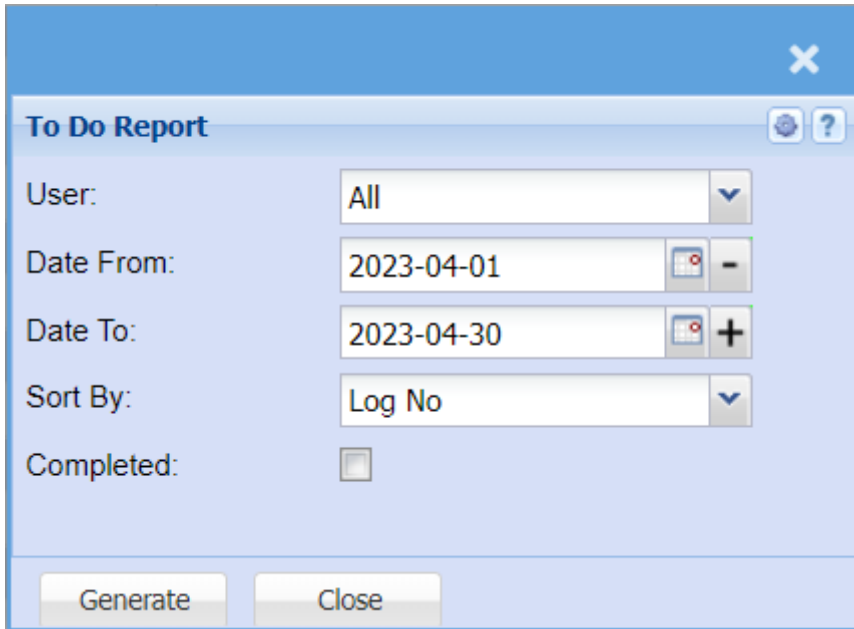
Close

Debtor From	
Date From	
Sort By	
Employee	
Group By	
Incl. Non-Billable Tick	
Debtor To	
Date To	
Time Log Type	
Inventory Type	
Decimal Places	
Notes Tick	

To Do Report

CRM> Reports> Report List

Gives a report on the To Do lists logged by each User within the system.



The screenshot shows a 'To Do Report' dialog box with the following fields and controls:

- User:** A dropdown menu currently set to 'All'.
- Date From:** A date input field showing '2023-04-01' with a minus button to the right.
- Date To:** A date input field showing '2023-04-30' with a plus button to the right.
- Sort By:** A dropdown menu currently set to 'Log No'.
- Completed:** An unchecked checkbox.
- Buttons:** 'Generate' and 'Close' buttons at the bottom.

This is the report on To Do lists logged by each user within the system.

The user will select the date from which he/she wants the report to run from and also Arrange it by log number, date or reference.

Completed option allows the user to either run the only the completed or uncompleted list