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**Building your Daily Management Report**

1. ****Click **Reports > Daily Management Report**
2. Click **Settings** in the Top Right Corner

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1. Chose a Category you would like to Build or Update a Current Brach

Once you have selected a category you would like to build, customize data on each tab.

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**General** – Customize Labels of different Branches within your Company

**KPI** – **Key Performance Indicators** allows the calculation of specific goals in categories

**Departments** – The departments that will be tracked with in the branches

**Types** – Call Type Goals: Allow you to specify percentage goals for call types for departments

**Tech Levels –** Allow you to easily specify the different revenue or percentage goals for different employees

**Edit**  on the Right hand side will allow you to change the **Category Name** and **Budget Multiplier** *(The Budget Multiplier takes your monthly Goal and Multiplies it to help you reach your target)* OR If you have added a new Category there is a **Create** Button on the Top Right you will have to Click.



* Click **Departments** and Either, Edit available Departments or create New ones with **Add Department** 

**Name**: What is the Department Called (Sales, Service, Installations & Call Center are standard)

**Revenue**:In this Category, what is the Percentage of Revenue This Department should be brining in (Ex: Sales is 80% while Service Might be 20%)

**Avg $ per Call**: What is the Average Dollar Amount Per Call you would like to see

**Goal $ per Call**: What is the Goal Dollar Amount Per Call you would like to see

**User Roles**: What Roles are needed for this Department

**Applies To Budget**: Apply revenue to the Budget Goal? *You should not track sales and installs. This will result in double revenue. Sales should be do not track, installs track. Sales revenue goes to install revenue automatically*

**Track Sales**: Do you want to Track the Sales of this Department?

**Track Callbacks**: Do you want to Track Callbacks for this Department?

**Opportunity, Dollars/Lead, Sales, Sold Labels :** What do you want the Labels in your DMR to say for these Options

**Show Get Back on Track:** Do you want to see what you need to sell to get back to your goal?

**Includes in Sales Conversion Percentage:** Does this get included in the percentage of sales?

**Auto-Summarize**: Uses default system settings to get metrics

Fill in the appropriate information



Add any more departments you would like to track and add information

* Click the **Type** Tab *Reference this Image for the next section*



Use either the Prepopulated Options or Add you own based off the Departments you created.

Click **+Add Type Goal**

To add more goals

* Choose **Department**
* Input Name for the **Call Type**
* Choose **Goal Type**

**Include in Summery:** Will this show in Departments Summery?

**Track Runs:** Track orders that meet order goal?

**Track Revenue**: Track income within the department?

**Track Generated:** do you want to track all generated for this type?

*Based on the Image Above the* ***Call Center*** *(Department) Choses a Category*

*Then Choses the Call Type for that Department*



*After Choosing the Type this is the* ***Job Information*** *page*

*Based on the refence Image you can see the* ***Category>Department>Job Types***

*This is for reference so you can see where these changes will be populated*



* Click the **KPI** Tab

There will be prebuilt **Key Performance Indicators** but this allows you to create your own for each



Clicking the Menu by Add Row will allow you to add more KPI indicators

you can see here, all the options that have been created from the previous menus are now in this list.

Selecting one and Chose **Add Row**



If the KPI Requires Revenue Tracking you can chose how that will be tracked on the right hand side of the table.

* Click on **Tech Levels**

You are able to divide your Technicians up based on your own Expectation Levels.

Chose a Name for the Level and Select the Users.



As you can see in the Image above, you are allowed to input revenue expectations as:

**Department:**

* Revenue Per call
* Callback Rate
* Total Revenue Goal (Monthly)

**Call type:**

* Minimum
* Goal

Use **+ Add Tech Level** to Create more Levels if you run out

After you are completed filling out each Technician level Click Done on the top Right.



Next Click on Apply Settings on the Left Side of the Page to Apply all Settings that were changed today.

*Note: You can change settings in the middle of the Month based off of new Goals, but the new Settings will only start at the Beginning of a new month, unless you “Apply Settings”.*



Then View Report to see the Results