

Next Level Reporting & Management Information

By Rebecca Taylor
Training Manager at Business Pilot
October 4th, 2023



WHAT WE WILL COVER

- Areas where you can access reports/MI
- Where data for the report comes from
 - ...and tips to create better reporting
- Use cases for your business

AREAS WHERE YOU CAN ACCESS REPORTS/MI

The image displays a BusinessPilot dashboard with several key areas highlighted for report and MI access:

- Navigation Menu (Left):** A dark sidebar menu lists various dashboard options: MI, Sales Dashboard, People & Sales Areas Dashboard, Leads & Products Dashboard, Status Dashboard, Ops Dashboard, and Marketing Dashboard.
- Live Service Calls (Center):** A table of service calls with columns for Call Id, Contract Number, and Customer. Below the table are buttons for '+ Add Service Call', 'Export To Excel', and 'Export To PDF'. The 'Export To Excel' and 'Export To PDF' buttons are highlighted with a red dashed box.
- Sales Report (Right):** A 'Sales Report' panel with filters for 'Customer Type' (All), 'Select Year', and 'Select Period'. It includes 'PDF' and 'Excel' download buttons.
- Company sales summary (Bottom):** A summary card showing 'Pipeline: £5,060,103.73' and 'Confirmed' status. Below it are four performance cards for Week 39, September, Q3, and Year 2023, each showing total sales and progress against a target.

Call Id	Contract Number	Customer
238367	1094	Ms A Yakubovich
238366	1093	Ms M Pickup
238365		

Week	Period	Quarter	Year
£47,817.96 Total sales 55.3% Target: £86,538.46	£330,132.89 Total sales 88.0% Target: £375,000.00	£1,391,841.72 Total sales 100.0% Target: £1,125,000.00	£4,466,766.13 Total sales 99.3% Target: £4,500,000.00

PERSONAL DASHBOARD - SALES

Welcome Rebecca
Here's your daily summary

Week 39 September Q3 2023

Switch Board Sales Management

Your tasks 1 Due today 1 Overdue

Date Due	Type	Customer	Town	Details
25/09/2023	Contract	Mrs E Deveson	Buckland	Supplier has confirmed a special discount on this order, can we discuss? ✓
26/09/2023	Lead	Ms J Stringer	Swindon	Sold this via phone call two weeks ago, however there's been a delay in their project and would like to discuss paying a holding deposit to secure the products but wont be ready for these now until June '24 ✓
27/09/2023	Lead	Mrs V Tinkler	Belfast	Sold via Showroom visit, ready for final checks. ✓
27/09/2023	Contract	Mr T Farebrother	Bristol	Can we discuss this one together in our meeting? ✓

What's on today

10:00
11:00
Sales Appointment
Ms M Wilson
Install Address

14:00
15:00
Sales Appointment
Mr O Hourihan
Install Address

Your feed
No unread mentions

Company sales summary Pipeline: £5,060,103.73 Confirmed

Week	Period	Quarter	Year
Week 39 £47,817.96 Total sales 55.3% Target: £86,538.46	September £330,132.89 Total sales 88.0% Target: £375,000.00	Q3 £1,391,841.72 Total sales 100.0% Target: £1,125,000.00	2023 £4,466,766.13 Total sales 99.3% Target: £4,500,000.00

Sales Management

Welcome Rebecca
Here's your daily summary

Week 39 September Q3 2023

Switch Board Sales

Your tasks 2 Due today 2 Overdue

Date Due	Type	Customer	Town	Details
25/09/2023	Contract	Mrs E Deveson	Buckland	I have booked in the survey, can you follow up with them please ✓
26/09/2023	Lead	Ms J Stringer	Swindon	Please can you call the customer and check their requirements ✓
27/09/2023	Lead	Mrs V Tinkler	Belfast	Please can you call the customer and check their requirements ✓
27/09/2023	Contract	Mr T Farebrother	Bristol	I have booked in the survey, can you follow up with them please ✓

What's on today

10:00
11:00
Sales Appointment
Ms M Wilson
Install Address

14:00
15:00
Sales Appointment
Mr O Hourihan
Install Address

Your feed
No unread mentions

Sales summary Pipeline: £1,670,177.16 Confirmed

Week	Period	Quarter	Year
Week 39 £47,817.96 Total sales 100.0% Target: £17,307.69	September £47,817.96 Total sales 63.8% Target: £75,000.00	Q3 £54,258.08 Total sales 24.1% Target: £225,000.00	2023 £987,190.89 Total sales 100.0% Target: £900,000.00

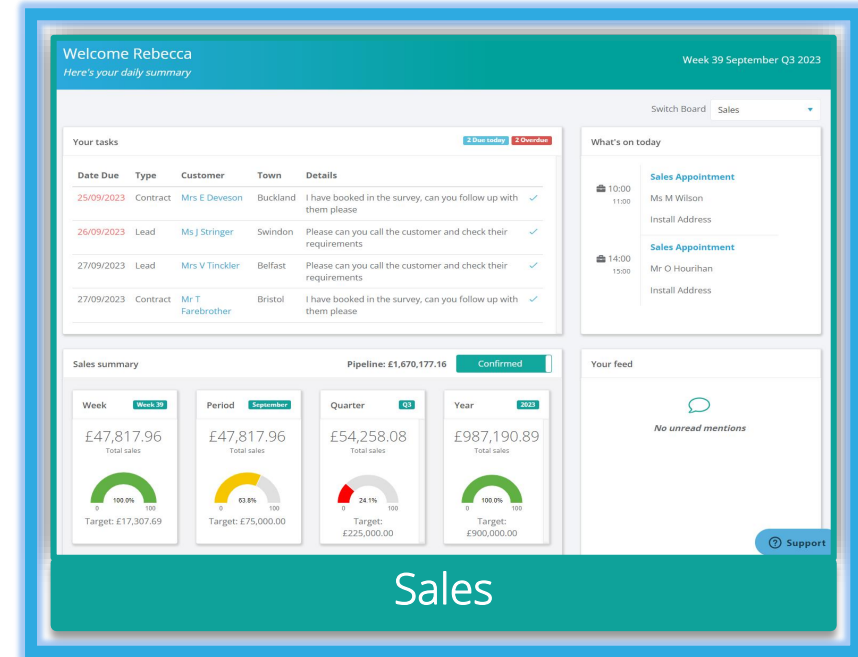
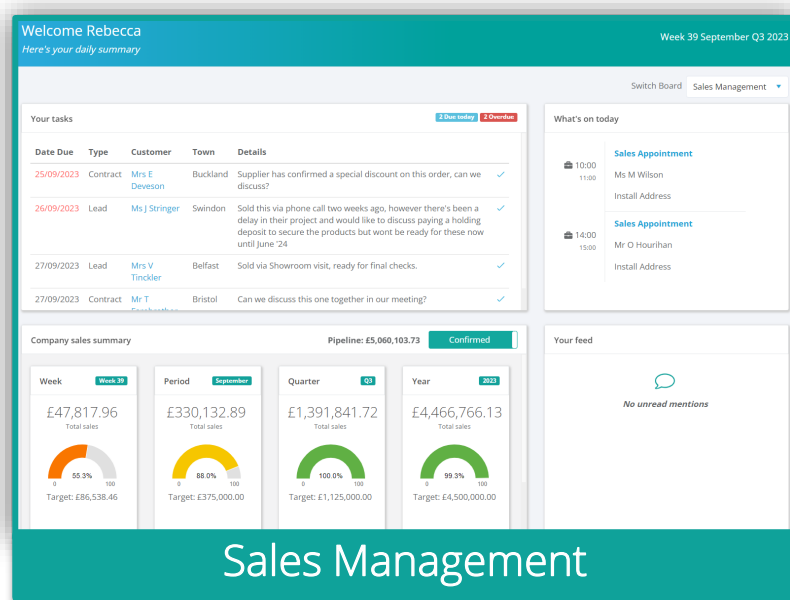
Sales

Support

SALES MANAGEMENT DASHBOARD



PERSONAL DASHBOARD - SALES



SALES DASHBOARD



PERSONAL DASHBOARDS - OPERATIONS

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Week 39 September Q3 2023

Switch Board Survey

Your tasks 2 Due today 1 Overdue

Date Due	Type	Customer	Town	Details	
25/09/2023	Contract	Mrs E Deveson	Buckland	Could you upload the survey to Docs and let me know the fitting allowance that is needed?	✓
26/09/2023	Lead	Ms J Stringer	Swindon	Could you upload the survey to Docs and let me know the fitting allowance that is needed?	✓
27/09/2023	Lead	Mrs V Tinkler	Belfast	Could you upload the survey to Docs and let me know the fitting allowance that is needed?	✓
27/09/2023	Contract	Mr T Farebrother	Bristol	Thank you for the Survey, could you confirm if scaffolding is required or will be supplied?	✓

Your feed

No unread mentions

What's on today

08:30 - 09:30
Surveyor Appointment
Mr O Hourihan
Install Address

10:30 - 11:30
Surveyor Appointment
Ms M Wilson
Install Address

Surveys Allocated 3 Surveys

Customer	Town	Postcode	Status	Stat Date
Mr T Farebrother	Bristol	BS41 3IV	Installation Scheduled	13/0
Mrs E Deveson	Buckland	CT16 9NE	Allocated To Surveyor	20/0

Survey

Welcome Rebecca
Here's your daily summary

Week 39 September Q3 2023

Switch Board Ops

Your tasks 2 Due today 2 Overdue

Date Due	Type	Customer	Town	Details	
25/09/2023	Contract	Mrs E Deveson	Buckland	Call to confirm the Service appointment tomorrow and confirm team member attending	✓
26/09/2023	Lead	Ms J Stringer	Swindon	Confirmation of delivery date from the supplier is awaited for parts order.	✓
27/09/2023	Lead	Mrs V Tinkler	Belfast	To call the customer in the prospect of closing off this service call	✓
27/09/2023	Contract	Mr T Farebrother	Bristol	The customer is holding the balance until the service call is confirmed, can you arrange this in the diary? Call ID 204039	✓

Your feed

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What's on today

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Contracts owned 2 Contracts

Customer	Town	Postcode	Status	Stat Date
Mr T Farebrother	Bristol	BS41 3IV	Installation Scheduled	13/0
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Ops

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Service summary

Waiting D...	Booked in	Revisit Re...	Completed
21 Calls waiting	2 Calls booked in period	2 Calls requiring revisit	2 Calls completed in period

Calls today

12:30 - 13:30
Service Appointment
Mr M Durrant
Install Address

14:00 - 15:00
Service Appointment
Rob Bird
Mr M Durrant
Install Address

Your feed

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Service

SURVEY DASHBOARD

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Week 39 September Q3 2023

Switch Board Survey

Your tasks

2 Due today 2 Overdue

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25/09/2023	Contract	Mrs E Deveson	Buckland	Could you upload the survey to Docs and let me know the fitting allowance that is needed?	✓
26/09/2023	Lead	Ms J Stringer	Swindon	Could you upload the survey to Docs and let me know the fitting allowance that is needed?	✓
27/09/2023	Lead	Mrs V Tinkler	Belfast	Could you upload the survey to Docs and let me know the fitting allowance that is needed?	✓
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Surveys Allocated

2 Surveys

Customer	Town	Postcode	Status	Status Date
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PERSONAL DASHBOARDS - OPERATIONS

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Service

OPS DASHBOARD

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Mrs E Deveson	Buckland	CT16 9ME	Allocated To Surveyor	20/05/2023	📄

Contracts owned 2 Contracts 1 Overdue

Customer	Town	Postcode	Status	Status Date	
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PERSONAL DASHBOARDS - OPERATIONS

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Ops

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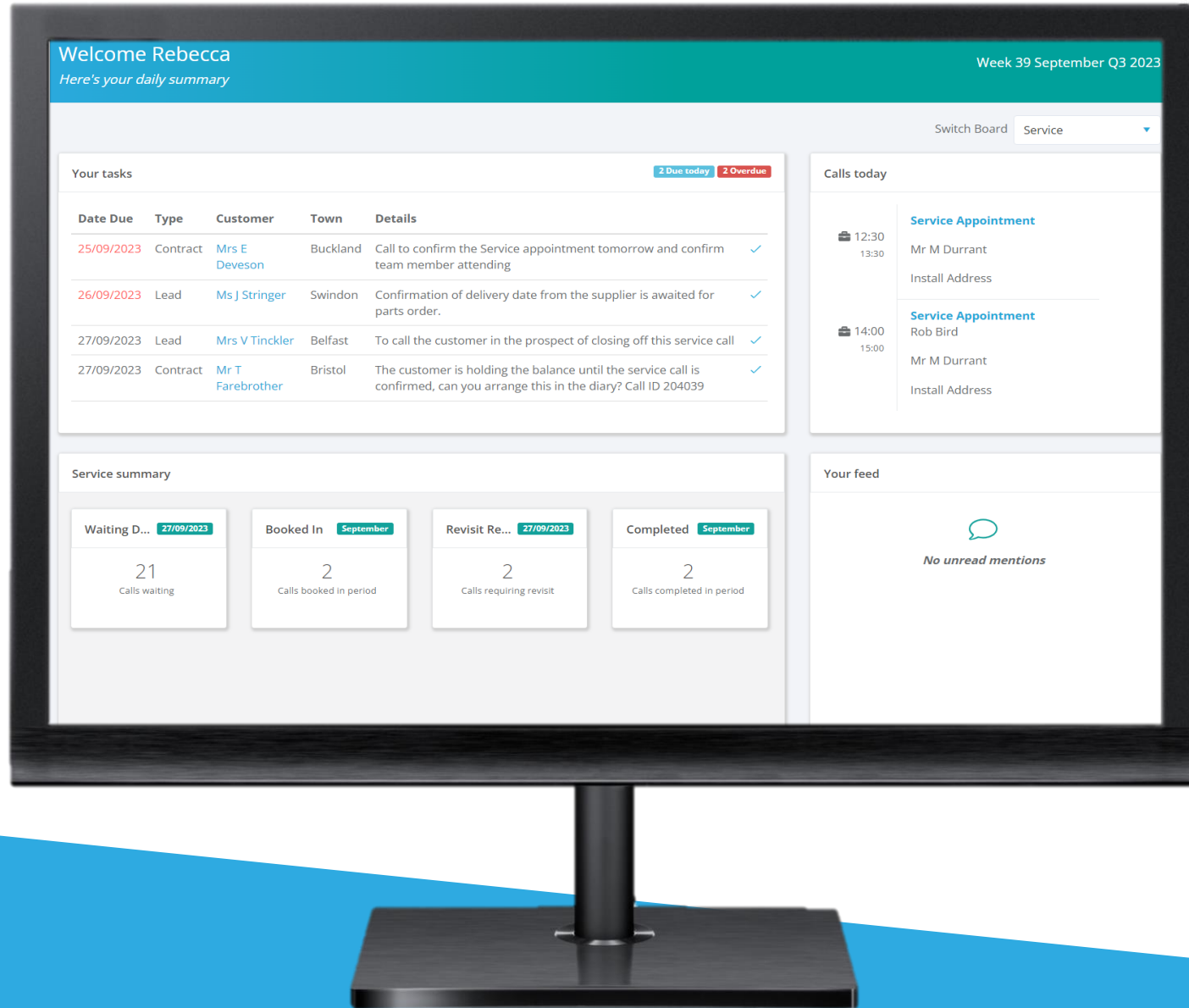
Your feed
No unread mentions

Service summary

Waiting D.	Booked in	Revisit Re...	Completed
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Service

SERVICE DASHBOARD



REPORTS

SALES REPORT

ORDERS ON HAND REPORT

**BALANCE OUTSTANDING
REPORT**

Customer Type:

Sales Report

- All
- Retail
- Trade

Sales Report

Select Year:

Select Period:

Job Cost Report

Job Cost Report

Report Date Type:

- Revenue Recognition Date
- Revenue Recognition Date
- Contract Completion Date
- Contract Date (Live PO Only)

To:

31/10/2023

PDF

Excel

Job Costs

Bulk Upload Record Invoices

+ Add Cost + Add Supplier Export To Excel Export To PDF

	Cost Id	Reference	Customer First Name	Customer Last Name	Contract Number	Supplier	Cost Type	Invoice Date	Net Value	Exported?
	876482	Stock - White Trim 25mm	Alice	Cooke	R1130	CFS Fixings	5000 - Purchase Invoices	29/09/2023	£75.00	✘
	876483	Stock - Silicone white tub	Alice	Cooke	R1130	Eurocell Kingston Park	5000 - Purchase Invoices	29/09/2023	£20.00	✘
	871429	Commissions	Darshan	Kishore Cruz	TSO1124	Callum Hawkes	5000 - Purchase Invoices	22/09/2023	£1,358.68	✘
	876808	Stock - White Trim 25mm	Markus	Greaves	C1142	CFS Fixings	5000 - Purchase Invoices	21/09/2023	£75.00	✘
	857675	1131 / 1286	Darshan	Kishore Cruz	TSO1124	Affordable Aluminium Systems	5000 - Purchase Invoices	06/09/2023	£12,000.00	✘
	768714	Stock - White Trim 25mm	Alice	Cooke	R1130	CFS Fixings	5000 - Purchase Invoices	31/07/2023	£62.50	✘
	748468	Stock - Silicone white tub	Sharon	Wallen	C1003	Eurocell Kingston Park	5000 - Purchase Invoices	05/07/2023	£50.00	✘
	745901	1112 / 163423	Arwen K	Van Wyk	R1129	Coastal Specialist Ironmongery	5000 - Purchase Invoices	30/06/2023	£220.00	✘
	745902	Install 09/07	Arwen K	Van Wyk	R1129	Callum Hawkes	5000 - Purchase Invoices	30/06/2023	£150.00	✘
	701426	1104 / 123	Tracey+Mark	Johnson	TSO1007	Alpha Plumbing & Heatings	5000 - Purchase Invoices	18/05/2023	£500.00	✘
									Total:	£943,023.05

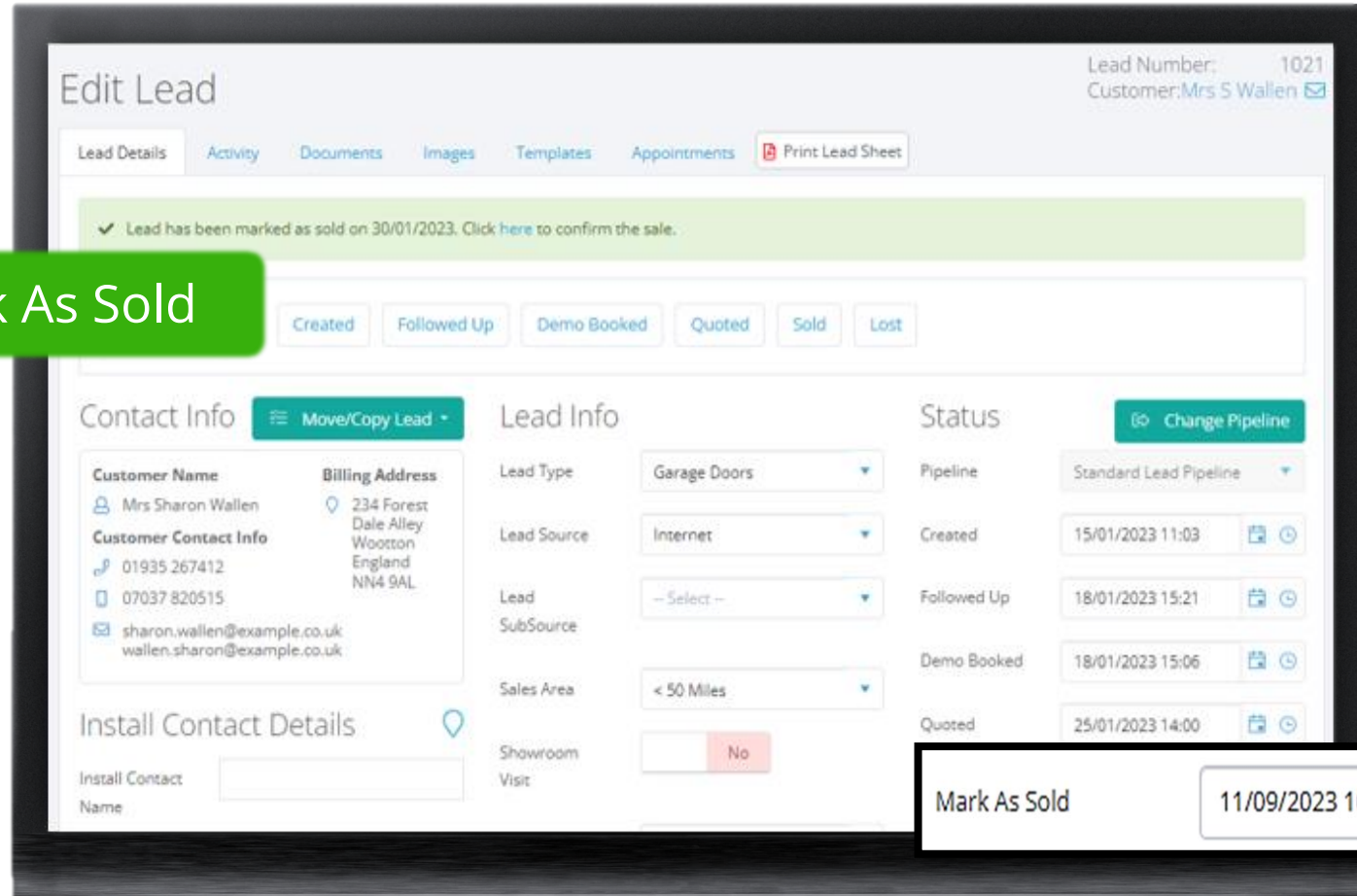
Customer	Contract	Contract Type	Sales Person	Sale Date	Completion Date	Net Value	Invoiced Net	Job Costs	Material Costs	Survey Costs	Sales Costs	Fitting Costs	Remake Costs	Consumable Costs	Other Costs	Total Costs	Job Profit (On Value)	Job Profit % (On Value)	Job Profit (On Invoices)	Job Profit % (On Invoices)	Target Profit %
Mr G Rodriguez	338383	Supply and Install	Oscar Mccoy	20/07/2023	04/09/2023	481.97	481.96	198.56	192.78	0.00	48.20	12.05	0.00	0.00	0.00	253.03	149.51	31.02	149.50	31.02	30.00
Mr E Salinas	338385	Supply and Install	Emilia Grey	25/07/2023	04/09/2023	992.81	992.81	603.65	397.12	0.00	99.28	24.82	0.00	0.00	0.00	521.23	389.16	39.20	389.16	39.20	30.00
Miss S Wyatt	338395	Supply and Install	Dan Crumbs	20/07/2023	04/09/2023	4035.10	4035.10	2622.47	1614.04	0.00	403.51	100.88	0.00	0.00	0.00	2118.43	1412.63	35.01	1412.63	35.01	30.00
Mrs L Long	338396	Supply Only	Oscar Mccoy	14/06/2023	04/09/2023	1052.50	1052.50	866.37	421.00	0.00	105.25	26.31	0.00	0.00	0.00	552.56	186.13	17.68	186.13	17.68	30.00
Z Doherty	338133	Supply and Install	Emilia Grey	03/08/2023	04/09/2023	182.59	182.59	125.92	73.04	0.00	18.26	4.56	0.00	0.00	0.00	95.86	56.67	31.04	56.67	31.04	30.00
Mr V Hoffman	338135	Supply and Install	Ted Patrick	18/12/2020	04/09/2023	73999.81	73999.81	43972.34	29599.92	0.00	7399.98	1850.00	0.00	0.00	0.00	38849.90	30027.47	40.58	30027.47	40.58	40.00
Ms I Pham	338113	Supply and Install	Dan Crumbs	18/07/2023	04/09/2023	155.00	155.00	62.18	62.00	0.00	15.50	3.88	0.00	0.00	0.00	81.38	92.82	59.88	92.82	59.88	30.00
Mr Fry	338112	Supply and Install	Oscar Mccoy	29/06/2023	04/09/2023	417.94	417.94	450.97	167.18	0.00	41.79	10.45	0.00	0.00	0.00	219.42	-33.03	-7.90	-33.03	-7.90	30.00
G Pugh Ltd	338113	Commercial	Dan Crumbs	24/05/2021	04/09/2023	37336.03	37336.03	26851.91	14934.41	0.00	3733.60	933.40	0.00	0.00	0.00	19601.42	10484.12	28.08	10484.12	28.08	40.00
Ms M Henry	338131	Supply Only	Oscar Mccoy	05/05/2023	04/09/2023	3067.00	3067.00	1770.98	1226.80	0.00	306.70	76.68	0.00	0.00	0.00	1610.18	1296.02	42.26	1296.02	42.26	42.00
Miss C Haas	338133	Supply and Install	Oscar Mccoy	19/04/2023	06/09/2023	1680.00	1680.00	642.67	672.00	0.00	168.00	42.00	0.00	0.00	0.00	882.00	1037.33	61.75	1037.33	61.75	42.00
Mr L Strong	338136	Supply and Install	Emilia Grey	31/05/2023	06/09/2023	2348.33	2348.34	1076.35	939.34	0.00	234.83	58.71	0.00	0.00	0.00	1232.88	1271.98	54.17	1271.99	54.17	42.00
Ms N Vance	338138	Supply and Install	Dan Crumbs	31/07/2023	06/09/2023	1694.00	1694.00	733.24	677.60	0.00	169.40	42.35	0.00	0.00	0.00	889.35	960.76	56.72	960.76	56.72	44.00

SALES REPORT

This report examines leads that have been converted into contracts, rather than looking at the Contract value, the report looks at the Sold value based on the Contract date.

Performance Evaluation						Conversion Timescale				Upsell Opportunity	
Customer	Contract	Contract Type	Sales Person	Lead Source	Lead Sub Source	Sale Date	Lead Date	Demo Date	Survey Date	Net Value (Lead)	Net Value (Contract)
Mr G Rodriguez	338383	Supply and Install	Oscar Mccoy	Internet	Website	10/08/2023	01/08/2023		18/08/2023	46500.00	46500.00
Mr E Salinas	338385	Supply and Install	Emilia Grey	Recommendation	Architect	11/08/2023	04/07/2023	10/07/2023	31/08/2023	82000.00	82000.00
Miss S Wyatt	338395	Supply and Install	Dan Crumbs	Recommendation	Customer	22/08/2023	25/07/2023	19/08/2023	30/08/2023	32000.00	32000.00
Mrs L Long	338396	Supply Only	Oscar Mccoy	Recommendation	Builder	22/08/2023	22/08/2023			31305.69	31305.69
Z Doherty	338133	Supply and Install	Emilia Grey	Exhibition	London	22/08/2023	02/08/2023		23/08/2023	21675.00	21675.00
Mr V Hoffman	338135	Supply and Install	Ted Patrick	Print Advertising	Roundabout	25/08/2023	13/06/2023	23/08/2023	29/08/2023	49611.88	49611.88
Ms I Pham	338113	Supply and Install	Dan Crumbs	Existing Customer	Return Business	31/08/2023	17/07/2023		07/09/2023	93122.00	93122.00
Mr Fry	338112	Supply and Install	Oscar Mccoy	Advertising	Brand Awareness	31/08/2023	31/07/2023		27/09/2023	21750.00	21750.00
G Pugh Ltd	338113	Commercial	Dan Crumbs	Recommendation	Architect	31/08/2023	20/04/2023	13/07/2023		270000.00	270000.00
Ms M Henry	338131	Supply Only	Oscar Mccoy	Existing Customer	Return Business	13/09/2023	12/09/2023			34057.00	36557.00
Miss C Haas	338133	Supply and Install	Oscar Mccoy	Internet	Website	13/09/2023	18/08/2023		11/10/2023	22350.00	22350.00
Mr L Strong	338136	Supply and Install	Emilia Grey	Internet	Website	14/09/2023	23/06/2023	18/08/2023		71487.50	71487.50
Ms N Vance	338138	Supply and Install	Dan Crumbs	Internet	Website	19/09/2023	18/07/2023	19/07/2023	12/10/2023	40112.00	40112.00

SALES REPORT



Mark As Sold

Mark As Sold 11/09/2023 10:42

SALES REPORT

Customer	Contract	Contract Type	Sale Date	Lead Source
Mr D Kishore Cruz	1124	Trade Supply Only	20/07/2022	Existing Customer

SALESPERSON MISSING?

Sold Leads

⚠ There are filters active on this view. [Clear All Filters](#)

[+ Add Lead](#) [Export To Excel](#) [Export To PDF](#)

Date Added	Lead No.	Customer	Install Postcode	Telephone	Email	Sale Date	Sales Person	Sales Area	Sale Value
26/01/2022	1282	Mr D Kishore Cruz	L74 1JJ	01183 985021	darshan.kishore cruz@example.co.uk kishore cruz.darshan@example.co.uk	19/05/2023		Devon	£44,196.96

TEAM EFFORT SALE?

Sold Leads

⚠ There are filters active on this view. [Clear All Filters](#)

[+ Add Lead](#) [Export To Excel](#) [Export To PDF](#)

Date Added	Lead No.	Customer	Install Postcode	Telephone	Email	Sale Date	Sales Person	Sales Area	Sale Value
26/01/2022	1282	Mr D Kishore Cruz	L74 1JJ	01183 985021	darshan.kishore cruz@example.co.uk kishore cruz.darshan@example.co.uk	19/05/2023	Office Sale	Devon	£44,196.96

SALES REPORT

Customer	Contract	Contract Type	Sales Person	Lead Source	Lead Sub Source	Sale Date	Lead Date	Demo Date	Survey Date	Net Value (Lead)	Net Value (Contract)
Mr M Greaves	C1142	Commercial	Rebecca Taylor	Supplier Referral	Internorn	22/09/2023	18/03/2022			0.00	-100.00
Mr M Greaves	C1142	Commercial	Rebecca Taylor	Supplier Referral	Internorn	22/09/2023	18/03/2022			98618.81	98718.81

Contract Value Adjustment

New Contract Adjustment

Adjustment Date: 22/09/2023

Adjustment: £0.00

VAT Code: T1 (20%)



Initial Contract Value: £98,718.81

Contract Date: 22/09/2023

Initial Contract Value: £98,718.81

Save

Previous Contract Adjustments

	Adjustment Date	Changed By	Adjustment	VAT Code	Net Value (After Adjustment)
 	22/09/2023	Rebecca Taylor (Operator)	-£100.00	T1	£98,618.81


RELEASED 20TH SEPTEMBER 2023

NEW FEATURE


ORDERS ON HAND REPORT

You can view the overall contract value of your LIVE contracts minus any raised invoices, i.e., the balance left to invoice.


Customer	Contract	Contract Type	Sales Person	Sale Date	Install Date	Net Value	Gross Value	Invoiced Net	Invoiced Gross	Paid	Balance To Invoice Net
Mr G Rodriguez	338383	Supply and Install	Oscar Mccoy	02/06/2023	02/10/2023	17600.00	17600.00	16720.00	16720.00	16720.00	880.00
Mr E Salinas	338385	Supply and Install	Emilia Grey	09/06/2023	21/09/2023	12500.00	15000.00	11875.00	14250.00	14250.00	625.00
Miss S Wyatt	338395	Supply and Install	Dan Crumbs	09/06/2023	02/10/2023	4652.00	5582.40	2326.00	2791.20	2791.20	2326.00
Mrs L Long	338396	Supply Only	Oscar Mccoy	12/06/2023		3758.33	4510.00	1879.17	2255.00	2255.00	1879.16
Z Doherty	338133	Supply and Install	Emilia Grey	15/06/2023	08/11/2023	16000.00	19200.00	8000.00	9600.00	9600.00	8000.00
Mr V Hoffman	338135	Supply and Install	Ted Patrick	19/06/2023	10/10/2023	12500.00	12500.00	6250.00	6250.00	6250.00	6250.00
Ms I Pham	338113	Supply and Install	Dan Crumbs	20/06/2023	16/11/2023	23932.33	28718.80	11666.67	14000.00	14000.00	12265.66
Mr Fry	338112	Supply and Install	Oscar Mccoy	20/06/2023	09/10/2023	46396.00	55675.20	44202.20	53042.64	53042.64	2193.80
G Pugh Ltd	338113	Commercial	Dan Crumbs	20/06/2023	14/11/2023	14818.00	17781.60	7409.00	8890.80	8890.80	7409.00
Ms M Henry	338131	Supply Only	Oscar Mccoy	20/06/2023	03/10/2023	2650.00	3180.00	1325.00	1590.00	1590.00	1325.00
Miss C Haas	338133	Supply and Install	Oscar Mccoy	20/06/2023	01/11/2023	41666.67	50000.00	20833.33	25000.00	25000.00	20833.34
Mr L Strong	338136	Supply and Install	Emilia Grey	22/06/2023	27/11/2023	32600.00	39120.00	16300.00	19560.00	19560.00	16300.00
Ms N Vance	338138	Supply and Install	Dan Crumbs	23/06/2023	14/12/2023	32663.32	39195.98	18719.16	22462.99	22462.99	13944.16




Type of Business



Turnaround



Pipeline



Forecast

ORDERS ON HAND REPORT

CONTRACTS TO SET UP

Create Contract

Contract Number: 1125
Customer: Miss A Hatcher

Contract Details Documents

Billing Contact

Miss Annabel Hatcher
01180 359451
07582 350976
annabel.hatcher@example.co.uk
hatcher.annabel@example.co.uk

Billing Address

82868 Canary Hill
Denton
England
M34 7LW

Install Address

82868 Canary Hill
Denton
England
M34 7LW
0.0 miles
00:00

Lead Details

Sales Person

Rebecca Taylor

Sales Area

< 10 Miles

Lead Sold Value (Net)

£52,797.04

Sold On

27/09/2023

Product Type

Solarlux

Product Interest (Main)

Wintergarden

Invoices & Payments

+ Add

Job Value Net	Invoiced Net	To Invoice Net	Invoiced Gross	Paid	Outstanding
£52,797.04	£15,839.12	£36,957.92	£19,006.94	£0.00	£19,006.94

Line	Type	Raised	Due	Inv Number	Net	Gross	Paid	Date Paid	Balance	Status
1	Deposit	27/09/2023	27/09/2023	1337	£15,839.12	£19,006.94	£0.00		£19,006.94	Due
2	Interim				£15,839.12	£19,006.94	£0.00			Not Raised
3	Interim				£15,839.12	£19,006.94	£0.00			Not Raised
4	Final				£5,279.68	£6,335.62	£0.00			Not Raised
					£52,797.04	£63,356.44	£0.00		£19,006.94	

← Back

Next →

BALANCE OUTSTANDING REPORT

This report will show the total value, per contract, of all overdue invoices within Business Pilot, based on the date range and invoice type chosen for the report.

Customer	Contract	Contract Type	Sales Person	Sale Date	Last Install Date	Net Value	Gross Value	Total		Total Invoiced			Payment		Contract		
								Invoiced Net	Gross	Total CIS	Total Paid	Total Balance	Method	Contract Status	Status Date	Finance Notes	First Install Date
Mr G Rodriguez	338383	Supply and Install	Oscar Mccoy	23/03/2023	03/08/2023	14250.00	17100.00	14250.00	17100.00	0.00	16696.00	404.00	Cash	Awaiting Service Call	07/08/2023	ON HOLD	01/08/2023
Mr E Salinas	338385	Supply and Install	Emilia Grey	27/03/2023	28/07/2023	56725.00	68070.00	56725.00	68070.00	0.00	64410.00	3660.00	Cash	Installation Scheduled	21/07/2023		17/07/2023
Miss S Wyatt	338395	Supply and Install	Dan Crumbs	31/03/2023	27/09/2023	4900.00	5880.00	4655.00	5586.00	0.00	2940.00	2646.00	Cash	Installation Scheduled	05/06/2023		27/09/2023
Mrs L Long	338396	Supply Only	Oscar Mccoy	21/04/2023	08/08/2023	20700.00	24840.00	20700.00	24840.00	0.00	23598.00	1242.00	Cash	Service Call Booked	25/08/2023		04/08/2023
Z Doherty	338133	Supply and Install	Emilia Grey	28/04/2023	23/09/2023	49166.66	58999.99	49288.08	59145.70	0.00	56195.70	2950.00	Cash	Installation Scheduled	07/08/2023		19/09/2023
Mr V Hoffman	338135	Supply and Install	Ted Patrick	05/05/2023	10/07/2023	4700.00	4700.00	4700.00	4700.00	0.00	4465.00	235.00	Cash	Debt Outstanding	29/08/2023	PAYMENT DUE 4TH OCT	10/07/2023
Ms I Pham	338113	Supply and Install	Dan Crumbs	17/05/2023	20/09/2023	5000.00	6000.00	5000.00	6000.00	0.00	5700.00	300.00	Cash	Installation Scheduled	21/09/2023		20/09/2023
Mr Fry	338112	Supply and Install	Oscar Mccoy	31/05/2023	30/08/2023	18791.67	22550.00	18791.66	22550.00	0.00	21422.50	1127.50	Cash	Installation Scheduled	29/08/2023		25/08/2023
G Pugh Ltd	338113	Commercial	Dan Crumbs	31/05/2023	01/09/2023	24958.33	29950.00	24958.34	29950.00	0.00	28452.50	1497.50	Cash	Installation Scheduled	18/08/2023		24/08/2023
Ms M Henry	338131	Supply Only	Oscar Mccoy	09/06/2023	28/09/2023	12500.00	15000.00	12500.00	15000.00	0.00	14250.00	750.00	Cash	Provisionally Booked	07/08/2023		21/09/2023
Miss C Haas	338133	Supply and Install	Oscar Mccoy	15/06/2023	14/09/2023	9400.00	11280.00	9400.00	11280.00	0.00	10716.00	564.00	Cash	Registered with FENSA	19/09/2023		14/09/2023
Mr L Strong	338136	Supply and Install	Emilia Grey	29/06/2023	19/09/2023	4362.00	5234.40	4362.00	5234.40	0.00	4980.18	254.22	Cash	Debt Outstanding	20/09/2023		18/09/2023
Ms N Vance	338138	Supply and Install	Dan Crumbs	29/06/2023	14/11/2023	214222.00	214222.00	106182.00	106182.00	0.00	100000.00	6182.00	Cash	Provisionally Booked	01/08/2023		24/10/2023

Type of Business

Turnaround

Status

Insight

BALANCE OUTSTANDING REPORT

The screenshot shows a software interface for editing a contract. The main section is titled 'Job Finance' and contains the following data:

Value (Gross)	£44,196.96 (£53,036.35)
Invoiced (Gross)	£35,357.57 (£42,429.09)
To Invoice (Gross)	£8,839.39 (£10,607.26)
Paid	£42,429.09
Balance OS	£0.00

Below this is the 'Job Margins' section:

Purchase Orders Net	£12,000.00
Costed Purchase Orders Net	£12,000.00
Job Costs Net	£13,358.68
Gross Profit Margin	69.77%
Job Value	£30,838.28
Invoiced Value	£21,998.89
	62.22%

The 'Finance Settings' section includes a 'Hide On Balance Reports' toggle set to 'No' and a 'Finance Notes' field with a red dashed border. A 'Support' button is visible in the bottom right corner of the interface.

Dispute? Add a note for your Balance Outstanding Report here.
Who's dealing with it? | When should this be resolved? | Key points?

BALANCE OUTSTANDING REPORT

This report will show the total value, per contract, of all overdue invoices within Business Pilot, based on the date range and invoice type chosen for the report.

Customer	Contract	Contract Type	Sales Person	Sale Date	Last Install Date	Net Value	Gross Value	Total		Total Invoiced			Payment		Contract		
								Invoiced Net	Gross	Total CIS	Total Paid	Total Balance	Method	Contract Status	Status Date	Finance Notes	First Install Date
Mr G Rodriguez	338383	Supply and Install	Oscar Mccoy	23/03/2023	03/08/2023	14250.00	17100.00	14250.00	17100.00	0.00	16696.00	404.00	Cash	Awaiting Service Call	07/08/2023	ON HOLD	01/08/2023
Mr E Salinas	338385	Supply and Install	Emilia Grey	27/03/2023	28/07/2023	56725.00	68070.00	56725.00	68070.00	0.00	64410.00	3660.00	Cash	Installation Scheduled	21/07/2023		17/07/2023
Miss S Wyatt	338395	Supply and Install	Dan Crumbs	31/03/2023	27/09/2023	4900.00	5880.00	4655.00	5586.00	0.00	2940.00	2646.00	Cash	Installation Scheduled	05/06/2023		27/09/2023
Mrs L Long	338396	Supply Only	Oscar Mccoy	21/04/2023	08/08/2023	20700.00	24840.00	20700.00	24840.00	0.00	23598.00	1242.00	Cash	Service Call Booked	25/08/2023		04/08/2023
Z Doherty	338133	Supply and Install	Emilia Grey	28/04/2023	23/09/2023	49166.66	58999.99	49288.08	59145.70	0.00	56195.70	2950.00	Cash	Installation Scheduled	07/08/2023		19/09/2023
Mr V Hoffman	338135	Supply and Install	Ted Patrick	05/05/2023	10/07/2023	4700.00	4700.00	4700.00	4700.00	0.00	4465.00	235.00	Cash	Debt Outstanding	29/08/2023	PAYMENT DUE 4TH OCT	10/07/2023
Ms I Pham	338113	Supply and Install	Dan Crumbs	17/05/2023	20/09/2023	5000.00	6000.00	5000.00	6000.00	0.00	5700.00	300.00	Cash	Installation Scheduled	21/09/2023		20/09/2023
Mr Fry	338112	Supply and Install	Oscar Mccoy	31/05/2023	30/08/2023	18791.67	22550.00	18791.66	22550.00	0.00	21422.50	1127.50	Cash	Installation Scheduled	29/08/2023		25/08/2023
G Pugh Ltd	338113	Commercial	Dan Crumbs	31/05/2023	01/09/2023	24958.33	29950.00	24958.34	29950.00	0.00	28452.50	1497.50	Cash	Installation Scheduled	18/08/2023		24/08/2023
Ms M Henry	338131	Supply Only	Oscar Mccoy	09/06/2023	28/09/2023	12500.00	15000.00	12500.00	15000.00	0.00	14250.00	750.00	Cash	Provisionally Booked	07/08/2023		21/09/2023
Miss C Haas	338133	Supply and Install	Oscar Mccoy	15/06/2023	14/09/2023	9400.00	11280.00	9400.00	11280.00	0.00	10716.00	564.00	Cash	Registered with FENSA	19/09/2023		14/09/2023
Mr L Strong	338136	Supply and Install	Emilia Grey	29/06/2023	19/09/2023	4362.00	5234.40	4362.00	5234.40	0.00	4980.18	254.22	Cash	Debt Outstanding	20/09/2023		18/09/2023
Ms N Vance	338138	Supply and Install	Dan Crumbs	29/06/2023	14/11/2023	214222.00	214222.00	106182.00	106182.00	0.00	100000.00	6182.00	Cash	Provisionally Booked	01/08/2023		24/10/2023

Type of Business

Turnaround

Status

Insight

BALANCE OUTSTANDING REPORT

Dispute? Add a note for your Balance Outstanding Report here.
Who's dealing with it? | When should this be resolved? | Key points?

Edit Contract

Contract Number: TSO1124
Lead Number: 1282
Customer: Mr D Kishore Cruz
BP Email: I-1282-BEDG@...

Contract Details Activity Documents Images Templates Appointments Invoices Purchase Orders Fitting Guarantees Service Finance Custom Fields

Finance Job Costs

Job Finance	
Value (Gross)	£44,196.96 (£53,036.35)
Invoiced (Gross)	£35,357.57 (£42,429.09)
To Invoice (Gross)	£8,839.39 (£10,607.26)
Paid	£42,429.09
Balance O/S	£0.00

Job Margins		
Purchase Orders Net	£12,000.00	
Costed Purchase Orders Net	£12,000.00	
Job Costs Net	£13,358.68	
	Job Value	Invoiced Value
Gross Profit	£30,838.28	£21,998.89
Margin	69.77%	62.22%

Finance Settings


Hide On Balance Reports No

Revenue Recognition Date

Target Profit Percentage

Finance Notes

Support

A person's hands are visible holding a large, light blue speech bubble. The speech bubble has a white tail pointing towards the bottom right. The background is white with a blue and teal decorative border at the bottom and right sides.

The power of exporting
can be greater than
the power of reports!

CREATE YOUR OWN REPORTS!

The screenshot displays the BusinessPilot software interface. At the top, there is a search bar with the text "Type to search...". Below this, the main heading is "Live Contracts". A red dashed box highlights two buttons: "Export To Excel" and "Export To PDF". Below the buttons is a table with columns: No., Customer, Owner, Salesman, Surveyor, Contract Type, Install Address 1, Install Postcode, Telephone, and Email. The first row shows contract TSO1124 for Mr D Kishore Cruz, Office Sale, by Jamie Brent, located at 06903 Ruskin Terrace, L74 1JJ. A context menu is open over the first row, showing options for "Sort Ascending", "Sort Descending", "Columns", and "Filter".

On the right side, there is a sidebar with a list of fields that can be included in a report, such as Pipeline, Contract Date, Salutation, First Name, Last Name, Company Name, Value (Gross), Est. Install Date, Install Name, Install Address Ref., Install Town, Install Team, Contract Status Order, Fitting Required?, Show On Fit Board?, Job Confirmed?, Mobile, Product Type, Sales Area, Survey Appt, Dist To Site (KM), Dist To Site (Miles), Time To Site (Mins), Target Profit (%), Invoiced (Net), On Hand (Net), Balance, Ignore Balance O/S?, Payment Method, Tags, Finance Provider, Finance Amount, Finance Term Length, and Access Equipment needed?.


In the foreground, a "Save View" dialog box is open. It has a "Name" field containing "Balance Due" and a "Save" button. The background table shows columns for Contract Type, Value, Install Start, Fit Days / Booked, Status, Status Date, and Balance. The first row shows a contract starting on 19/05/2023 with a balance of £0.00. The second row shows a contract starting on 10/05/2023 with a balance of £123,480.51. The third row shows a contract starting on 21/08/2023 with a balance of £0.00. The fourth row shows a contract starting on 04/04/2023 with a balance of -£2,012.00. The fifth row shows a contract starting on 04/04/2023 with a balance of £13,412.00. The sixth row shows a contract starting on 03/02/2023 with a balance of £4,360.46. The seventh row shows a contract starting on 14/10/2022 with a balance of £49,052.65. The eighth row shows a contract starting on 03/02/2023 with a balance of £13,793.03.

CUSTOM REPORTS

Let's see what our "Export to Excel" feature offers on the service call page

MI SALES DASHBOARD



Sales People 



 Export

Sales Person	Leads Added	Demos Sat	Lost	Sales Won	Hit Rate	Average Sale Value	Total Net Sales	Target	+/-
John Mills	28	20	5	14	50.00%	£40,672.70	£569,417.82	£250,684.93	£318,732.89
Rebecca Taylor	11	13	3	8	72.73%	£31,647.21	£253,177.69	£250,684.93	£2,492.76
Ryan Thomas	10	11	3	7	70.00%	£42,725.84	£299,080.88	£250,684.93	£48,395.95
Not Specified	0	0	0	0	0.00%	£0.00	£0.00	£0.00	£0.00
Total	49	44	11	29	59.18%	£38,678.50	£1,121,676.39	£752,054.79	£369,621.60

Sold Leads


[+ Add Lead](#) [Export To Excel](#) [Export To PDF](#)

Select a view  

	Lead No.	Customer	Install Postcode	Sale Date	Sales Person	
	1019	Ms K Jacques	LE15 5ZI	28/04/2023		<
	1018	Mr D Galbraith	BT2 2SY	05/12/2022	John Mills	<

MI SALES DASHBOARD

Sales Areas 

 Export

Sales Area	Leads Added	Demos Sat	Lost	Sales Won	Hit Rate	Average Sale Value	Total Net Sales	Target	+/-
< 10 Miles	3	2	1	1	33.33%	£52,797.04	£52,797.04	£0.00	£52,797.04
< 20 Miles	5	3	0	1	20.00%	£82,604.86	£82,604.86	£0.00	£82,604.86
< 30 Miles	2	7	1	2	100.00%	£43,811.49	£87,622.97	£0.00	£87,622.97
< 50 Miles	1	4	0	4	400.00%	£53,410.75	£213,642.99	£0.00	£213,642.99
50 + Miles	3	5	2	6	200.00%	£41,677.60	£250,065.59	£0.00	£250,065.59
Not Specified	0	0	0	0	0.00%	£0.00	£0.00	£0.00	£0.00
Total	14	21	4	14	100.00%	£49,052.39	£686,733.45	£0.00	£686,733.45

MI SALES DASHBOARD

Period Target 

	Target	Actual	Difference
Demos	30	21	-9

	Target	Actual	Difference
Sales	£300,000.00	£686,733.45	£386,733.45



Sales & Marketing

Contact Types

Lead Sources

Lead Sub Sources

Marketing Targets

Project Types

Reasons For Loss

Sales Areas

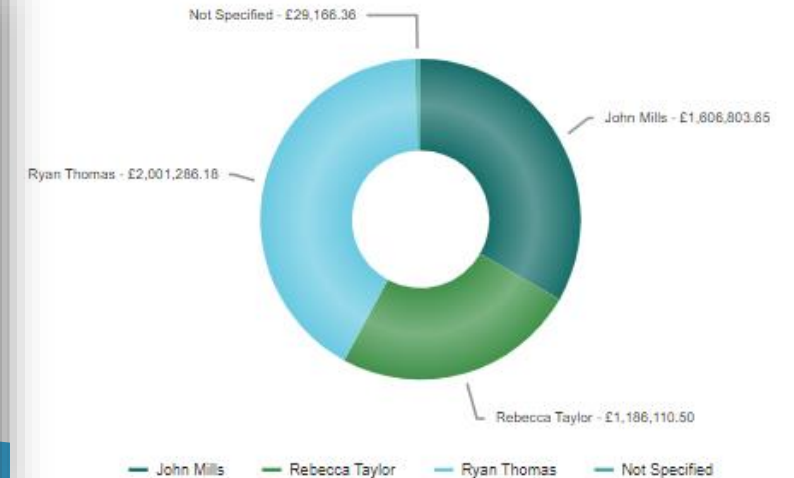
Sales Years

MI PEOPLE & SALES AREA DASHBOARD

Activity By Sales Person ⓘ

	Person	Leads Added		Demos Sat		Sales Won			Lost		Pipeline	
		No.	Value	No.	Value	No.	Value	Hit Rate	No.	Value	No.	Value
+	John Mills	80	£3,905,159.44	62	£2,902,376.17	35	£1,606,803.65	43.75%	12	£640,276.43	40	£2,041,756.51
+	Rebecca Taylor	51	£2,224,112.02	48	£2,204,592.68	28	£1,186,110.50	54.90%	9	£242,595.30	34	£1,724,177.16
+	Ryan Thomas	77	£3,552,832.23	73	£3,562,318.29	45	£2,001,286.18	58.44%	10	£534,684.27	31	£1,348,170.06
+	Not Specified	1	£29,166.36	1	£29,166.36	1	£29,166.36	100.00%	0	£0.00	0	£0.00
Combined		209	£9,711,270.05	184	£8,698,453.50	109	£4,823,366.69	52.15%	31	£1,417,556.00	105	£5,114,103.73

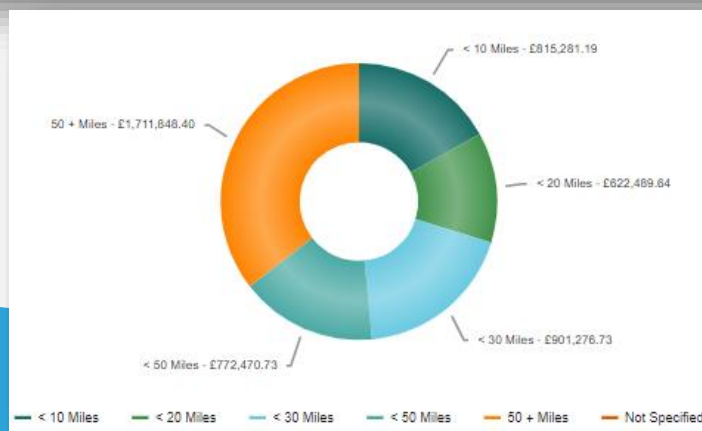
	Person	Leads Added		Demos Sat		Sales Won			Lost		Pipeline	
		No.	Value	No.	Value	No.	Value	Hit Rate	No.	Value	No.	Value
-	John Mills	80	£3,905,159.44	62	£2,902,376.17	35	£1,606,803.65	43.75%	12	£640,276.43	40	£2,041,756.51
	Advertising	16	£834,046.14	15	£717,858.62	5	£261,282.95	31.25%	2	£96,039.23	8	£402,282.87
	Direct Mail	15	£683,735.31	12	£548,840.08	6	£274,453.37	40.00%	3	£128,044.18	9	£475,898.91
	Existing Customer	17	£990,810.47	11	£619,781.57	7	£367,533.30	41.18%	3	£223,081.91	10	£518,609.41
	Internet	13	£544,451.92	12	£473,921.08	7	£308,325.71	53.85%	2	£90,650.03	4	£145,476.18
	Recommendation	13	£601,874.05	10	£424,670.78	7	£320,126.84	53.85%	1	£9,239.44	6	£363,758.51
	Showroom	6	£250,241.55	5	£217,562.24	3	£75,081.48	50.00%	1	£93,221.64	3	£135,730.63
	Not Specified	0	£0.00	0	£0.00	0	£0.00	0.00%	0	£0.00	0	£0.00



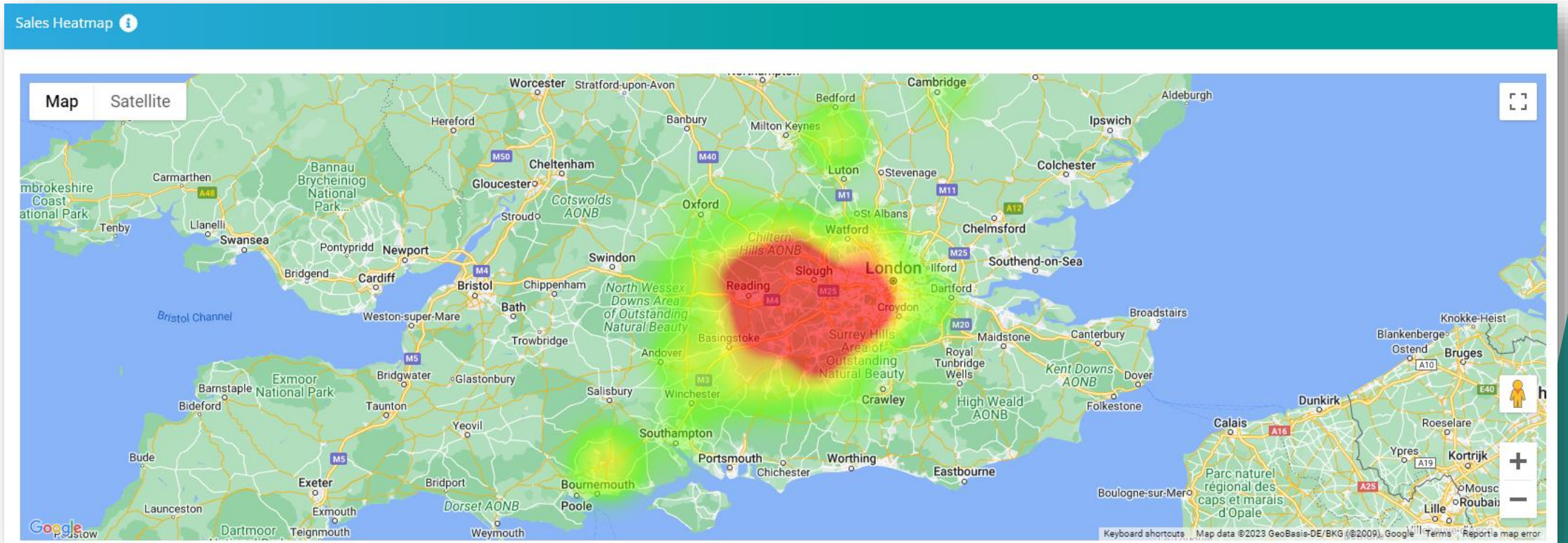
MI PEOPLE & SALES AREA DASHBOARD

Activity By Sales Areas ?

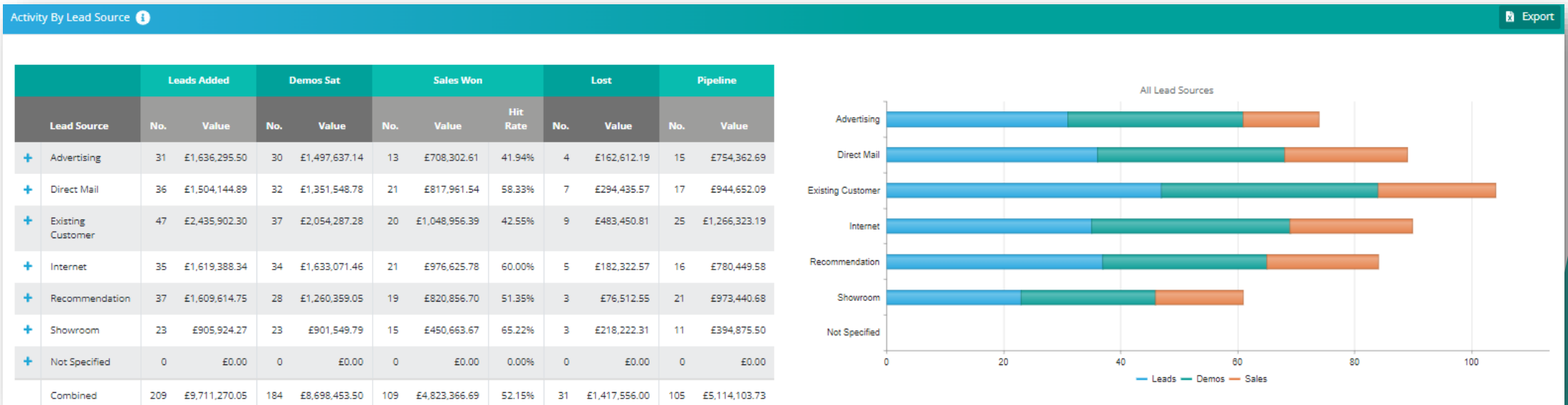
Area	Leads Added		Demos Sat		Sales Won			Lost		Pipeline	
	No.	Value	No.	Value	No.	Value	Hit Rate	No.	Value	No.	Value
< 10 Miles	43	£1,668,312.01	35	£1,446,104.21	21	£815,281.19	48.84%	10	£346,557.25	18	£834,891.10
< 20 Miles	34	£1,539,374.43	25	£1,031,279.65	16	£622,489.64	47.06%	3	£124,283.89	26	£1,355,624.06
< 30 Miles	36	£1,645,491.16	37	£1,888,760.96	19	£901,276.73	52.78%	5	£221,288.70	17	£668,773.01
< 50 Miles	48	£2,319,964.82	45	£1,985,198.61	20	£772,470.73	41.67%	8	£424,579.65	23	£1,192,963.31
50 + Miles	48	£2,538,127.63	42	£2,347,110.07	33	£1,711,848.40	68.75%	5	£300,846.51	21	£1,061,852.25
Not Specified	0	£0.00	0	£0.00	0	£0.00	0.00%	0	£0.00	0	£0.00
Combined	209	£9,711,270.05	184	£8,698,453.50	109	£4,823,366.69	52.15%	31	£1,417,556.00	105	£5,114,103.73



MI PEOPLE & SALES AREA DASHBOARD



MI LEADS & PRODUCTS DASHBOARD

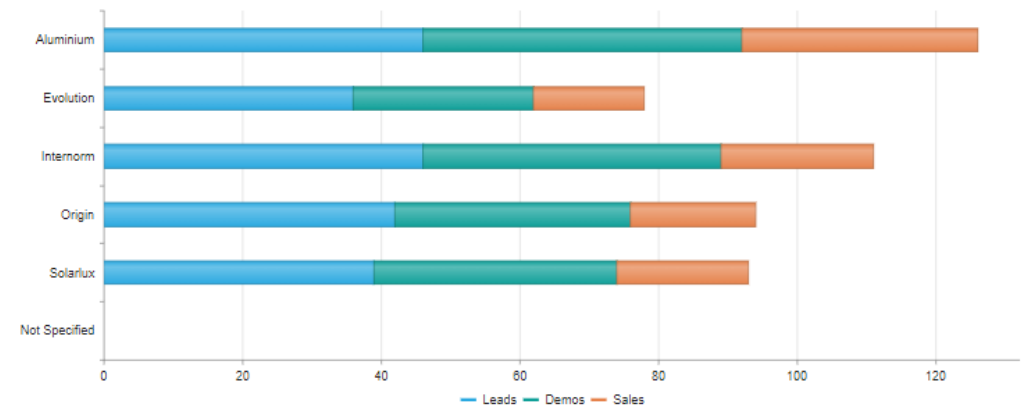


MI LEADS & PRODUCTS DASHBOARD

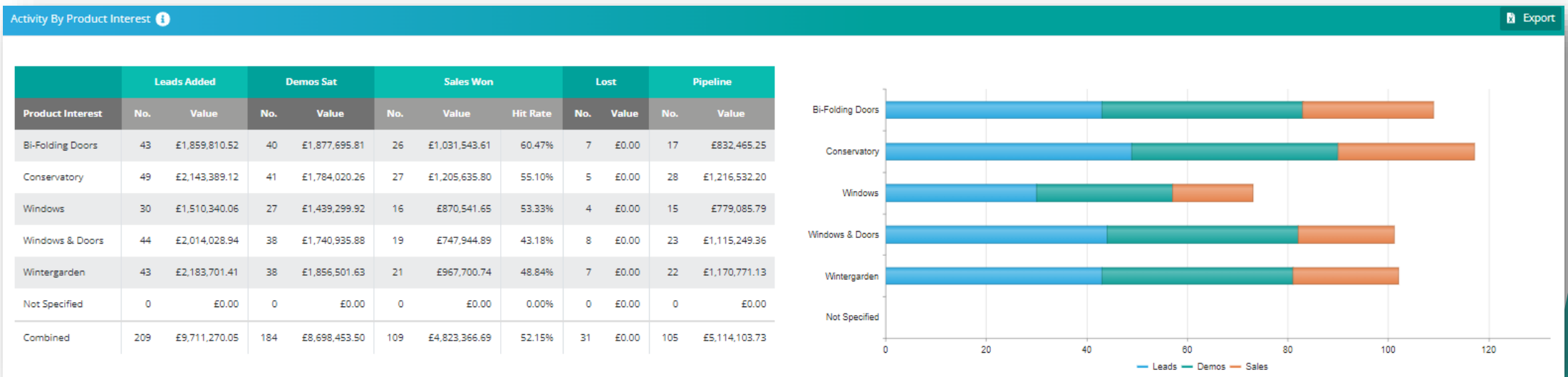
Activity By Product Type ⓘ

Export

Product Type	Leads Added		Demos Sat		Sales Won			Lost		Pipeline	
	No.	Value	No.	Value	No.	Value	Hit Rate	No.	Value	No.	Value
Aluminium	46	£2,156,064.57	46	£2,094,656.32	34	£1,402,533.14	73.91%	3	£170,137.26	21	£1,121,139.71
Evolution	36	£1,562,337.68	26	£1,068,555.14	16	£726,645.73	44.44%	6	£244,663.68	21	£910,371.27
Internorm	46	£2,227,625.51	43	£2,238,441.35	22	£866,626.63	47.83%	7	£398,827.90	21	£1,172,829.80
Origin	42	£1,853,455.54	34	£1,554,387.65	18	£880,886.58	42.86%	7	£272,556.43	25	£996,978.75
Solarlux	39	£1,911,786.75	35	£1,742,413.04	19	£946,674.61	48.72%	8	£331,370.73	17	£912,784.20
Not Specified	0	£0.00	0	£0.00	0	£0.00	0.00%	0	£0.00	0	£0.00
Combined	209	£9,711,270.05	184	£8,698,453.50	109	£4,823,366.69	52.15%	31	£1,417,556.00	105	£5,114,103.73



MI LEADS & PRODUCTS DASHBOARD



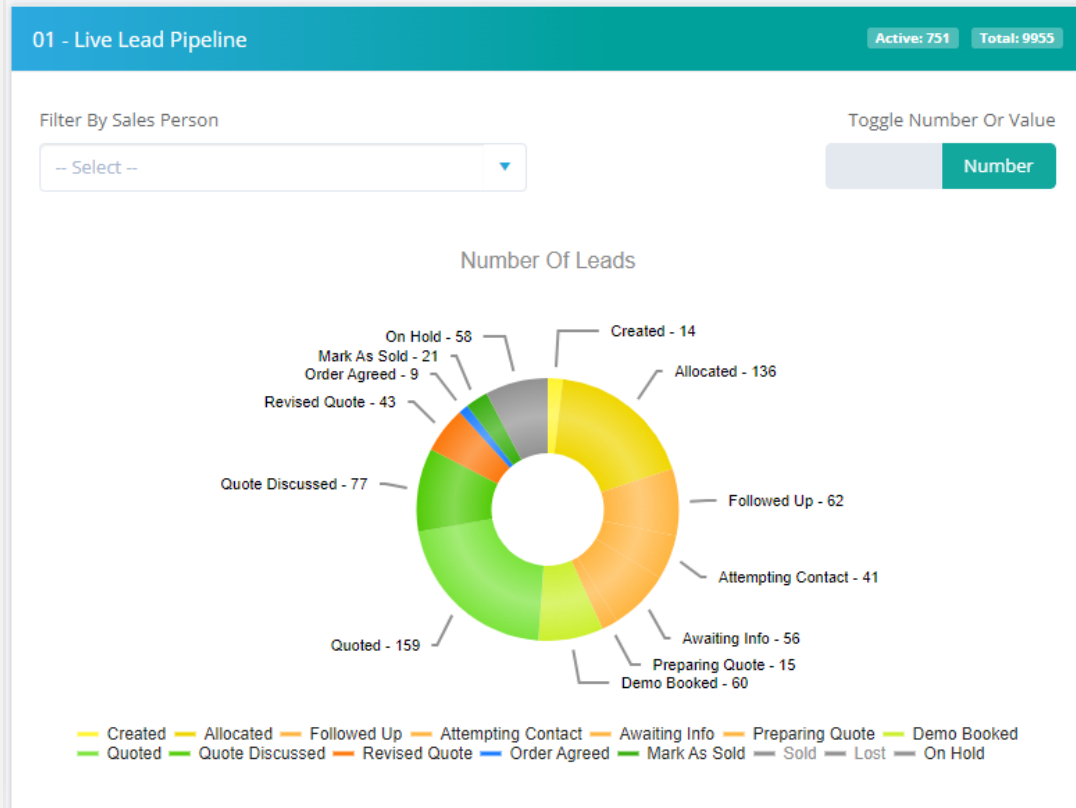
MI LEADS & PRODUCTS DASHBOARD

Pipeline By Lead Source ? Export

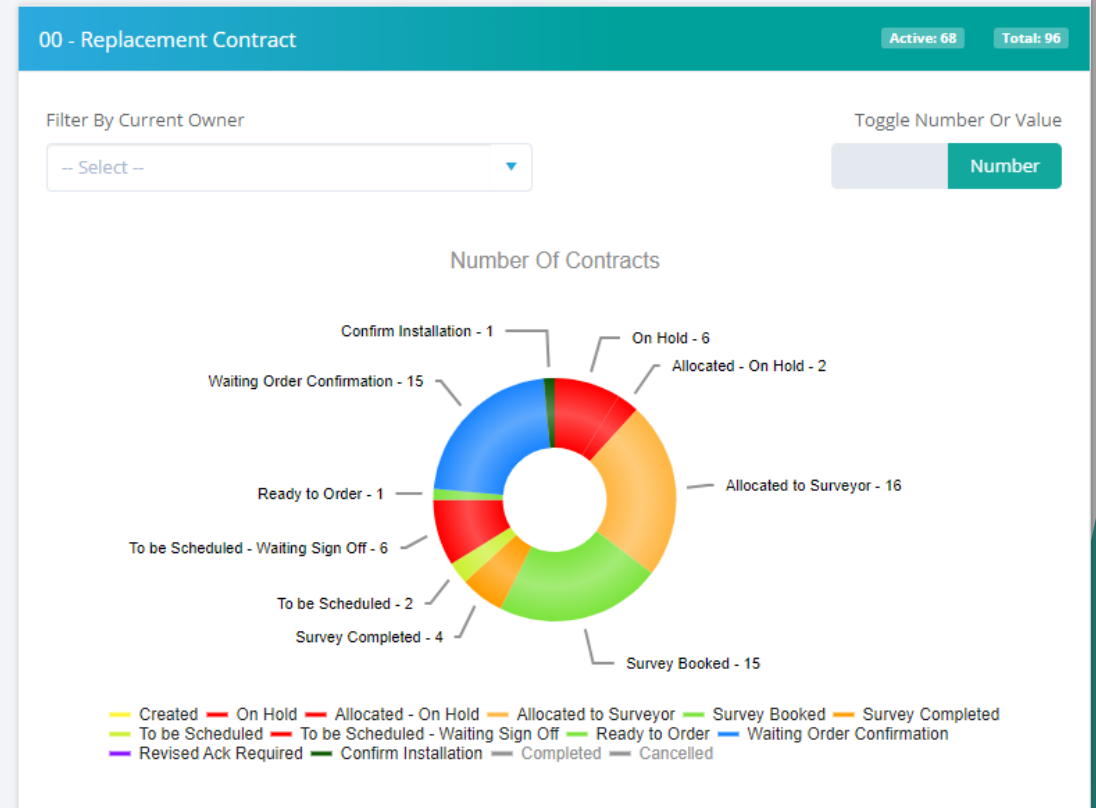
Lead Source	< 30 Days		< 90 Days		> 90 Days		All	
	No.	Value	No.	Value	No.	Value	No.	Value
Advertising	3	£174,065.49	2	£120,483.51	10	£459,813.69	15	£754,362.69
Direct Mail	3	£87,957.41	5	£279,370.63	9	£577,324.05	17	£944,652.09
Existing Customer	3	£186,148.38	4	£145,669.88	18	£934,504.93	25	£1,266,323.19
Internet	2	£100,243.69	2	£76,491.72	12	£603,714.17	16	£780,449.58
Recommendation	3	£186,472.96	6	£259,136.84	12	£527,830.88	21	£973,440.68
Showroom	0	£0.00	2	£53,369.19	9	£341,506.31	11	£394,875.50
Not Specified	0	£0.00	0	£0.00	0	£0.00	0	£0.00
Combined	14	£734,887.93	21	£934,521.77	70	£3,444,694.03	105	£5,114,103.73

MI STATUS DASHBOARD

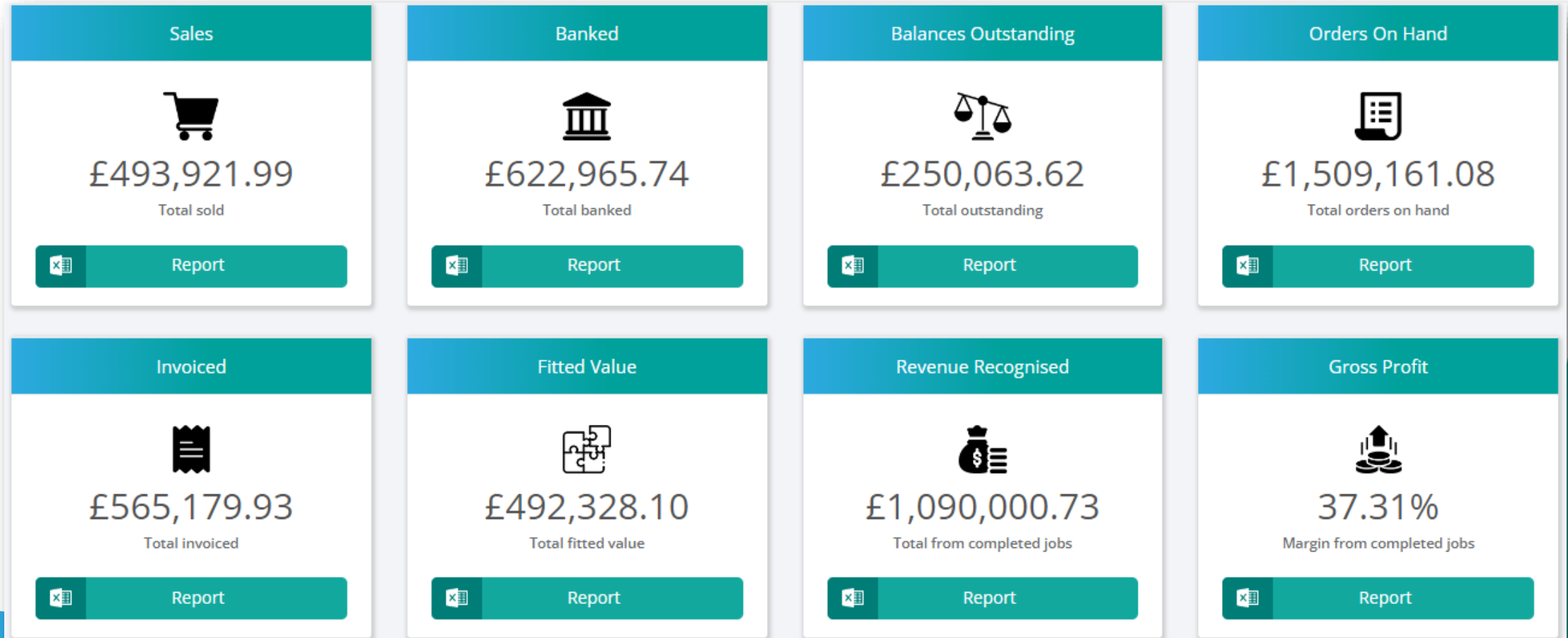
Lead Pipelines



Contract Pipelines



MI OPS DASHBOARD



MI MARKETING DASHBOARD


Leads By Lead Source ?

Export ▼

Lead Source	Budget	Leads Added			Demos Sat			Sales Won					
		No.	Cost/Lead	Cost/Lead %	No.	Cost/Demo	Cost/Demo %	No.	Cost/Sale	Cost/Sale %	Turnover	AOV	Turnover/Budget %
+ Advertising	£10,000.00	31	£322.58	3.23%	30	£333.33	3.33%	13	£769.23	7.69%	£708,302.61	£54,484.82	1.41%
+ Direct Mail	£300.00	36	£8.33	2.78%	32	£9.38	3.12%	21	£14.29	4.76%	£817,961.54	£38,950.55	0.04%
+ Existing Customer	£0.00	47	£0.00	0.00%	37	£0.00	0.00%	20	£0.00	0.00%	£1,048,956.39	£52,447.82	0.00%
+ Internet	£1,500.00	35	£42.86	2.86%	34	£44.12	2.94%	21	£71.43	4.76%	£976,625.78	£46,505.99	0.15%
+ Recommendation	£0.00	37	£0.00	0.00%	28	£0.00	0.00%	19	£0.00	0.00%	£820,856.70	£43,202.98	0.00%
+ Showroom	£1,200.00	23	£52.17	4.35%	23	£52.17	4.35%	15	£80.00	6.67%	£450,663.67	£30,044.24	0.27%
+ Not Specified	£0.00	0	£0.00	0.00%	0	£0.00	0.00%	0	£0.00	0.00%	£0.00	£0.00	0.00%
Combined	£13,000.00	209	£62.20	0.48%	184	£119.27	0.92%	109	£0.00	0.00%	£4,823,366.69	£44,251.07	0.27%

MI MARKETING DASHBOARD

Leads By Product Interest ?

 Export

Product Interest	Leads Added			Demos Sat			Sales Won					
	No.	Cost/Lead	Cost/Lead %	No.	Cost/Demo	Cost/Demo %	No.	Cost/Sale	Cost/Sale %	Turnover	AOV	Turnover/Budget %
Bi-Folding Doors	43	£62.20	2.33%	40	£70.65	2.50%	26	£119.27	3.85%	£1,031,543.61	£39,674.75	0.30%
Conservatory	49	£62.20	2.04%	41	£70.65	2.44%	27	£119.27	3.70%	£1,205,635.80	£44,653.18	0.27%
Windows	30	£62.20	3.33%	27	£70.65	3.70%	16	£119.27	6.25%	£870,541.65	£54,408.85	0.22%
Windows & Doors	44	£62.20	2.27%	38	£70.65	2.63%	19	£119.27	5.26%	£747,944.89	£39,365.52	0.30%
Wintergarden	43	£62.20	2.33%	38	£70.65	2.63%	21	£119.27	4.76%	£967,700.74	£46,080.99	0.26%
Not Specified	0	£0.00	0.00%	0	£0.00	0.00%	0	£0.00	0.00%	£0.00	£0.00	0.00%
Combined	209	£62.20	0.48%	184	£70.65	0.54%	109	£119.27	0.92%	£4,823,366.69	£44,251.07	0.27%

MI MARKETING DASHBOARD

Leads By Product Type ?

Export

Product Type	Leads Added			Demos Sat			Sales Won					
	No.	Cost/Lead	Cost/Lead %	No.	Cost/Demo	Cost/Demo %	No.	Cost/Sale	Cost/Sale %	Turnover	AOV	Turnover/Budget %
Aluminium	46	£62.20	2.17%	46	£70.65	2.17%	34	£119.27	2.94%	£1,402,533.14	£41,250.97	0.29%
Evolution	36	£62.20	2.78%	26	£70.65	3.85%	16	£119.27	6.25%	£726,645.73	£45,415.36	0.26%
Internorm	46	£62.20	2.17%	43	£70.65	2.33%	22	£119.27	4.55%	£866,626.63	£39,392.12	0.30%
Origin	42	£62.20	2.38%	34	£70.65	2.94%	18	£119.27	5.56%	£880,886.58	£48,938.14	0.24%
Solarlux	39	£62.20	2.56%	35	£70.65	2.86%	19	£119.27	5.26%	£946,674.61	£49,824.98	0.24%
Not Specified	0	£0.00	0.00%	0	£0.00	0.00%	0	£0.00	0.00%	£0.00	£0.00	0.00%
Combined	209	£62.20	0.48%	184	£70.65	0.54%	109	£119.27	0.92%	£4,823,366.69	£44,251.07	0.27%

SUMMARY

- A range of ways to get data
- The key is the quality of the input
- You only get benefit, when you use the reports to take action in your business