



## Platform Reports

**Overview:** In order to report monthly results and to do periodic checks, our platform provides reporting tools. The reports relevant to your monthly reporting include the following:

1. Revenue by Contact – Although the name is confusing, this is actually the report you would use to determine your Sales for the month.
2. Payments Received – In order to compile the Revenue you collected for the month in the platform, you would use this report.

### Revenue by Contact

The Revenue by Contact report will reflect the sales recorded in the platform. Only new sales should be entered into the system as an invoice in the current month. No recurring payments should be associated with a new invoice. If a sale is not complete (no money has been collected), you may enter an Invoice but the Contact should remain in Recruiting status until some money is collected. Once an amount is collected, the Contact Status should be changed to Client.

### Navigation

To run the Revenue by Contact report, take the following steps:

1. Login to the platform.
2. Select the Contacts Tab
3. In the Reports section, select 'Invoice Reports & Settings'.
4. On the Invoices & Payments Plans page, in the Invoice Reports section, select 'Revenue by Contact'

## Invoices & Payment Plans

Reports & Settings

The screenshot shows the 'Invoices & Payment Plans' interface. On the left, there are two main sections: 'Invoice Defaults & Notifications' with a 'Manage Settings & Emails' link, and 'Invoice Reports' with a 'Revenue by Contact' link circled in red. Below 'Invoice Reports' is 'Outstanding Invoices'. On the right, the 'Revenue Report by Contact' section is active, showing a 'Year' dropdown set to '2018' and a 'Con' dropdown. Below this is a table with columns for 'Contact name', 'Jan', 'Feb', and 'Mar'. The table lists contact names: Kelly Frye, Tami Abram, Julie Adams, and Kellan Alford.

Contact name	Jan	Feb	Mar
Kelly Frye			
Tami Abram			
Julie Adams			
Kellan Alford			



## Filtering

You may filter the report by Year and Contact status. There is a Sales category filter. You should only use 'Total billed' as the setting in this field. The other selections do not function within our system for billing and collections.

Revenue Report by Contact

Year  Contact status  Sales

## Report Body

The report itself consists of your Clients listed as the rows. The months of the year are the columns and there are totals at the end of each row and column.

Contact name	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Kelly Frye							2,200.00						2,200.00

## Print and Export

There is a Print option at the bottom of the report but there is no export option. If you want an electronic copy of the report, you must highlight the entire report and use Copy and Paste.



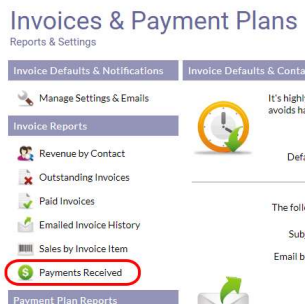
## Payments Received

The Payments Received report will detail the revenue collected for each Contact Invoice. It displays the Contacts as Rows vertically on the page. The Invoice Date, Number, Unpaid balance and Invoice total will be listed for each Contact. Also listed will be the payments made along with the payment date. The report has a count of invoices, total of payments and total unpaid balance at the bottom of the page.

## Navigation

To run the Payments Received report, take the following steps:

1. Login to the platform.
2. Select the Contacts Tab
3. In the Reports section, select 'Invoice Reports & Settings'.
4. On the Invoices & Payments Plans page, in the Invoice Reports section, select 'Payments Received'



## Filtering

You may filter the report by Date Range. To do this, you can select any of the links to timeframes – Last 30 days, Last month, This month or Last year. You can also manually select the Start and End dates for the report. If you like, you can use the Contacts field to select a single contact to view their payments.





## Print and Export

It is possible to either Print this report to your printer or Export report data to an Excel (csv) file. If you select 'Export report data', an additional window will open that will hold the file.

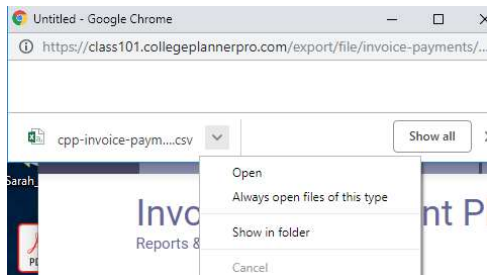
Total number of invoices: 319  
Total unpaid balance: (USD) \$476,016.18

Payments total: (USD) \$89,345.68

\* Payments received affecting invoice balance may not be displayed based on report filter settings. This is the actual invoice balance remaining.

Print report

Export report data



To view the file, just click on it or click the drilldown button to display other options.