

# Managerial Reports

<a href="#"><u>Actions By User</u></a>	Displays a view of action status within the selected timeframe, enabling managers to track completions and uphold employee accountability.
<a href="#"><u>Issues by Category And Reason</u></a>	Detailed listing of all tracked issues within a specified date range.
<a href="#"><u>Job Status Timelines</u></a>	Displays the duration between different job statuses, enabling users to assess lead times and view average timelines within the specified date range.
<a href="#"><u>Spans</u></a>	Displays the duration between the start and final actions selected, enabling users to gain insights into the time it takes to complete specific actions.
<a href="#"><u>Red Flags</u></a>	Helps you stay on top of jobs that may be falling behind schedule by viewing the actions designated as 'Red Flags'.
<a href="#"><u>Jobs With No Open Actions</u></a>	Displays all jobs that are currently in the Accepted status or later but remain incomplete and have no pending actions.
<a href="#"><u>Overrides</u></a>	Presents an overview of all pricing overrides by job and area within the specified date range.
<a href="#"><u>Labor Tracking</u></a>	Serves as a tool for tracking and measuring the time it takes for users to complete specific actions.
<a href="#"><u>Job Cost – Actual</u></a>	Displays various metrics such as revenue, margin, square footage, and waste, enabling a full analysis of each job's performance.
<a href="#"><u>Job Cost – Projected</u></a>	Provides projected revenue, margin, and margin percentage for quoted jobs within the specified date range.
<a href="#"><u>Job Cost – Projected (Summary)</u></a>	Provides a summary of all jobs within the desired date range and status, grouped by Dealer/Account.
<a href="#"><u>Job Cost – Projected (by Dealer-Account)</u></a>	Displays the same information as the Job Cost – Projected report but organizes jobs by Dealer/Account and provides an estimated margin percentage for each Dealer/Account.
<a href="#"><u>Stale Actions</u></a>	Offers an overview of all pending actions that are open and past due.
<a href="#"><u>Octane (by Dealer-Account)</u></a>	Enables users to measure Octane for each job within a specified date range, sorted by Dealer/Account.

## Estimate/Quoting Reports

<a href="#">Estimate</a>	Presents a detailed overview of the estimate or proposal.
<a href="#">Estimate With Subtotal</a>	Itemizes taxes separately from the total Estimate amount.
<a href="#">Estimate (No Alternatives)</a>	Provides a simplified version of the Estimate report by omitting alternative materials and alternative edges from the view.
<a href="#">Estimate (No Total)</a>	Eliminates the grand total amount of the estimate from the bottom of the proposal.
<a href="#">Estimate With Fab Layout</a>	Displays the estimate, job drawing, and fabrication layout together.
<a href="#">Final</a>	Serves as the Final Estimate or Contract where clients acknowledge their acceptance of the final price.
<a href="#">Revision Comparison</a>	Allows you to compare one Estimate revision to another by displaying a line-by-line comparison.

## Sales Accounting/Financial Reports

<a href="#">Totals By Role</a>	Offers a breakdown of revenue totals based on user roles.
<a href="#">Totals By Dealer</a>	Displays the revenue generated by each Account/Dealer.
<a href="#">Installed Jobs</a>	Offers an overview of the installed jobs categorized by Account/Dealer and includes percentage of revenue generated by each account.

## Job Reports

<a href="#"><u>Header With Custom Text</u></a>	Displays the customer information in the header of the report but allows the user to customize the messaging within the report body.
<a href="#"><u>Job Site Details</u></a>	Provides an overview of all the key job details for the selected project. Primarily used by the template and install teams.
<a href="#"><u>Job Site Details - Landscape</u></a>	Serves as an alternative version of the standard Job Site Details report, specifically designed to accommodate a larger drawing view.
<a href="#"><u>Active Jobs</u></a>	Offers an overview of all active jobs, organized by their current status, enabling users to monitor progress and ensure timely completion.
<a href="#"><u>Active Jobs By Partner</u></a>	Provides an overview of active jobs organized by Partner/Dealer, ideal for users targeting specific partner-related job tracking and management.
<a href="#"><u>Job History</u></a>	Displays a grid of all completed actions on the job.
<a href="#"><u>Inventory Line Items</u></a>	Displays all associated inventory items assigned to a particular job.

## Job Accounting/Financial Reports

<a href="#"><u>Invoice</u></a>	Displays the Invoice for the job.
<a href="#"><u>Deposit Request</u></a>	Provides the deposit amount that is required to initiate and accept the order.
<a href="#"><u>Receipt</u></a>	Provides an overview of all areas of the job, including payments made towards the job.
<a href="#"><u>Online Payments</u></a>	Displays overview of all payments received through the Basys integration, sorted by Dealer/Account.
<a href="#"><u>Open Job Orders</u></a>	Provides a view of all jobs that have been accepted after the selected date but have not yet been invoiced.
<a href="#"><u>Job Activity With Payments By Account</u></a>	Provides a view of active jobs within the designated date range, including payments and amount due organized by Account/Dealer.
<a href="#"><u>Job Activity With Payments By Sales Rep</u></a>	Displays active jobs within the designated date range, including payments and amount due organized by Sales Rep.
<a href="#"><u>Worksheet</u></a>	Serves as an internal tool for management, providing a view of the costs and revenue associated with each line item of a job.

## QuickBooks Reports

<a href="#"><u>Invoice Export Reconciliation</u></a>	Displays jobs successfully exported to QuickBooks within the specified install date range, sorted by Account/Dealer.
<a href="#"><u>Payments With Export Date</u></a>	Presents users with a view of all payments made within the specified date range, including the date they were exported into QuickBooks.
<a href="#"><u>Inventory Snapshot With Mapping</u></a>	Delivers a list of all inventory items grouped according to the Inventory Mapping Field in ActionFlow, which directly relates to the Inventory Item/Inventory Part Type in QuickBooks.

## Scheduling Reports

<a href="#"><u>Compact Install Schedule</u></a>	Organized by date and installer, this report offers a snapshot of the number of parts (tops) associated with each job, ensuring accurate and efficient loading of trucks for the day.
<a href="#"><u>Install Schedule (Short)</u></a>	Displays the install schedule, sorted by date.
<a href="#"><u>Install Schedule Checklist</u></a>	Provides a more detailed install schedule, sorted by install date. Displays details including number of pieces, square footage, and any additional items.
<a href="#"><u>Job Site Schedule</u></a>	Provides users with a summary of the day's jobs for each template and installer.
<a href="#"><u>Fab Schedule</u></a>	Exclusively made for users our Fab Scheduler, this report displays the schedule by color instead of job, sorted by fabrication station.
<a href="#"><u>Fab Schedule (Short)</u></a>	Provides an overview of jobs in production, sorted by target date.
<a href="#"><u>Fab Schedule (Job)</u></a>	Provides a view of all jobs currently in production within the specified date range, organized and sorted by station.

## Template/Install Reports

<a href="#">Templated Jobs By Templater</a>	Displays all jobs that have been templated within the specified date range, sorted by templater.
<a href="#">Installed Jobs By Installer</a>	Displays the completed installs within a specified date range, sorted by installer.
<a href="#">Installed Jobs With Address</a>	Displays completed installs along with the address, revenue, payments and balance due for each job.

## Production Reports

<a href="#">Shop Details</a>	Displays information important for production.
<a href="#">Shop Details - Landscape</a>	Functions identically to the standard Shop Details report but is optimized for landscape orientation, offering a wider view of the pertinent job details.
<a href="#">Fab Layout</a>	Displays the fabrication layout for the job.
<a href="#">Fab Layout (Multi)</a>	Displays the fabrication layout across multiple pages, with each page dedicated to a specific slab.
<a href="#">Customer Layout</a>	Displays the project layout for the selected customer.
<a href="#">Customer And Fab Layout</a>	Presents a combined view of the project layout and fabrication layout, conveniently consolidated into a single, user-friendly report.
<a href="#">Jobs With Stone Present Not Yet Fabricated</a>	Provides a convenient way to identify all jobs where the material is already present but have not yet been fabricated.
<a href="#">DXF Drawing</a>	Displays the DXF drawing which has been imported into the area of the job.
<a href="#">Uploaded Drawings</a>	Displays the drawing that has been uploaded within the Area Module of a specific job.
<a href="#">Top Labels</a>	Generates a dedicated label for each part/top on the fabrication layout.
<a href="#">Top Labels - Landscape</a>	Generates landscape-oriented labels for each top on the fabrication layout.
<a href="#">Top Labels 3x1</a>	Produces labels measuring 3" x 1" for each part/top on the fabrication layout.
<a href="#">Top Labels 4x2</a>	Produces labels measuring 4" x 2" for each part/top on the fabrication layout.

# Inventory Reports

<a href="#"><u>Available Inventory Items</u></a>	Lists all in-stock items organized by SKU Class, enabling efficient inventory management.
<a href="#"><u>Usable Inventory Items By Color</u></a>	Offers a view of available inventory for the selected color.
<a href="#"><u>Usable Inventory Items By Job</u></a>	Provides an overview of the slabs or items required for selected job.
<a href="#"><u>Upcoming Jobs with Inventory Data</u></a>	Provides an overview of upcoming jobs, sorted by material.
<a href="#"><u>Inventory Alerts</u></a>	Provides a view of inventory items that have a minimum stock quantity associated with them. Shows surplus inventory so you can easily identify what needs to be ordered.
<a href="#"><u>Inventory Alerts (NonSerialized)</u></a>	Operates similarly to the standard Inventory Alerts report but displays non-serialized inventory items.
<a href="#"><u>Inventory Waste</u></a>	Displays waste totals and percentages within a specified date range, organized by color.
<a href="#"><u>Purchase Order</u></a>	Provides a detailed list of items to be ordered from your supplier.
<a href="#"><u>Purchase Order with Item #</u></a>	Offers the same information as the standard Purchase Order report but includes the ActionFlow Item Number for each item.
<a href="#"><u>Purchase Order with Price</u></a>	Includes pricing and sizes for each item listed on your order.
<a href="#"><u>Purchase Order with Price &amp; Item #</u></a>	Displays pricing information, the ActionFlow Item # and the Vendor Item # for each item on your order.
<a href="#"><u>Receiving Worksheet</u></a>	Displays the listing of slabs that are scheduled to arrive on the truck for the selected order.
<a href="#"><u>Tagged Items</u></a>	Provides a listing of all tagged items sorted by color.
<a href="#"><u>Tagged Items By Customer Name</u></a>	Displays all tagged items sorted by customer.
<a href="#"><u>Tagged Items By Job Number</u></a>	Displays all tagged items, sorted by job number.
<a href="#"><u>Sinks By Template Date</u></a>	Functions similarly to the Sinks By Install Date report, but displays sinks allocated for jobs based on the selected template date range.
<a href="#"><u>Sinks By Install Date</u></a>	Provides an overview of all sinks assigned to each job, organized by their installation dates.
<a href="#"><u>Consigned Slabs</u></a>	Provides an overview of all available, tagged, and sold slabs that are awaiting payment, organized by supplier.

# Inventory Accounting/Financial Reports

<a href="#"><u>Cost of Goods Sold</u></a>	Offers a detailed breakdown of the cost of goods sold, conveniently sorted by SKU Class within the specified date range.
<a href="#"><u>Inventory COGS by SKU Class</u></a>	Displays cost of goods sold within the specified period sorted by SKU Class.
<a href="#"><u>Inventory Financial Summary</u></a>	Provides an overview of inventory adjustments and values within the specified period, organized by SKU Class.
<a href="#"><u>Inventory Snapshot</u></a>	Offers an overview of inventory levels and values as of a specified date, conveniently organized by SKU Class.
<a href="#"><u>Inventory Snapshot (Nonserialized)</u></a>	Displays quantity, cost, and value for non-serialized items in your inventory, organized by SKU Class.
<a href="#"><u>Totals By Material</u></a>	Provides a breakdown of the revenue generated by each color.
<a href="#"><u>Inventory Used</u></a>	Provides an overview of all slabs cut within a specified date range.
<a href="#"><u>Slabs To Pay For</u></a>	Provides an overview of all outstanding materials that have not yet been paid for.
<a href="#"><u>Consigned Slabs To Pay For</u></a>	Presents a list of all slabs that have been cut or installed but are still pending payment.
<a href="#"><u>Inventory Invoices</u></a>	Provides an overview of open invoices organized by vendor.

# Barcode Reports

<a href="#"><u>Barcode 3 x 1</u></a>	Generates individual barcodes measuring 3" x 1".
<a href="#"><u>Barcode 4 x 2</u></a>	Creates individual barcodes measuring 4" x 2".
<a href="#"><u>Barcode – Thin</u></a>	Generates individual barcodes measuring 4" x 5/8".
<a href="#"><u>Barcode – Thin .5</u></a>	Generates individual barcodes measuring 4" x 1/2".
<a href="#"><u>Barcode – Vertical</u></a>	Produces individual barcodes in a vertical orientation measuring 1" x 3".
<a href="#"><u>Barcode – Vertical Thin</u></a>	Produces individual barcodes 5/8" x 3" in a vertical orientation.
<a href="#"><u>Barcode 22up</u></a>	Produces a list of barcodes for efficient slab tracking during receipt or transfer.
<a href="#"><u>Barcoded Locations</u></a>	Creates individual barcodes for each location within your facility.

## Commercial Reports

<a href="#"><u>Commercial Estimate</u></a>	Created for commercial projects, this generates a single, consolidated estimate which displays pricing details for multiple jobs or phases.
<a href="#"><u>Project Proposal</u></a>	A tool for quoting commercial projects, providing a detailed breakdown of all line items associated with each job.
<a href="#"><u>Commercial Invoice</u></a>	Consolidates multiple jobs into a single invoice for commercial projects.

## Multi-Facility Reports

<a href="#"><u>Active Jobs – MF</u></a>	Designed for users utilizing our multi-facility feature, this mirrors the Active Jobs report but adds the ability to filter by facility.
<a href="#"><u>Job Cost – Actual - MF</u></a>	Specifically designed for clients who utilize our multi-facility option and functions similarly to the Job Cost - Actual report.
<a href="#"><u>Templated Jobs By Templater (MF)</u></a>	Tailored for clients using our multi-facility feature, this report displays templated jobs within the specified date range.
<a href="#"><u>Installed Jobs By Installer (MF)</u></a>	Designed specifically for clients using our multi-facility option and provides an overview of completed installs within the specified date range.
<a href="#"><u>Red Flags – MF</u></a>	Specifically designed for clients utilizing our multi-facility option, this report provides all the information that the standard Red Flags report offers, but also includes the fabrication facility details.
<a href="#"><u>Inventory Snapshot - MF</u></a>	For clients utilizing our multi-facility option. Provides an overview of inventory levels and values as of a specified date, organized by SKU Class and facility.
<a href="#"><u>Tagged Items By Job Number – MF</u></a>	Specifically designed for clients utilizing the multi-facility option, this provides an overview of tagged items sorted by job number.
<a href="#"><u>Pending Transfers</u></a>	Made for clients using the multi-facility option, this provides a list of inventory items scheduled for transfer from one facility to another.