

How To: Use Source of Business Dashboards

This tutorial will introduce the source of business dashboards, how they are populated and how to use them. Source of Revenue Dashboards and Reports are only visible to users who are assigned the *Assured Manager* profile.



1. Log in to the JobCheck Web Desktop as the Assured Manager user.
2. Click on the *Dashboards* tab from the primary navigation bar.

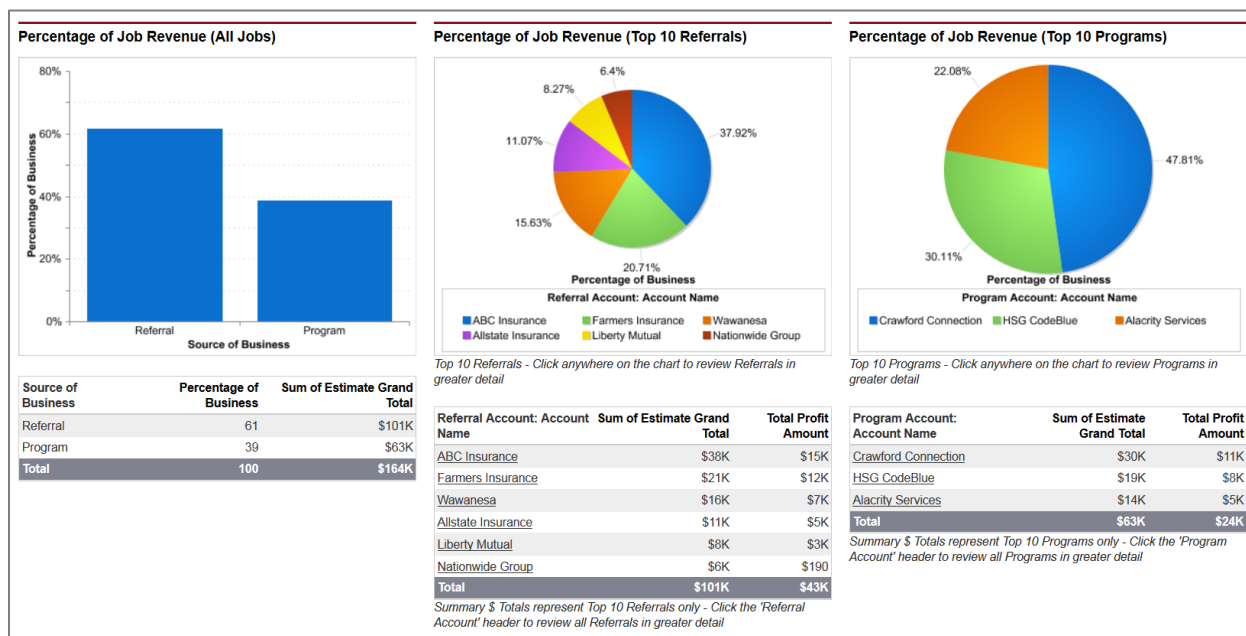


Figure 1 Source of Business (Programs and Referrals) dashboard.

Revenue and profit amounts are populated by the progress totals in the financials tab of all closed jobs. Source of Business reports and dashboards can only be used if the financial plan is used consistently.

Source of Business reports and dashboards are tools for the owner or management roles within a company. These tools provide insight into the source of revenue gained from referral sources or program sources; this may include but is not limited to programs, insurance companies, agents or brokers, or sub-trades. Any account in the system can be tracked as a referral source.

Reports and Dashboards List

As the Assured Manager, you will have access to reports and manager dashboards that are not visible to other users in the system. Open the *Reports* tab from the primary navigation and select *Source of Business Dashboards*, or if you want to see a breakdown of the dashboard data, open the folder for *Source of Business Reports*.

Source of Business Dashboards

Source of Business Dashboards

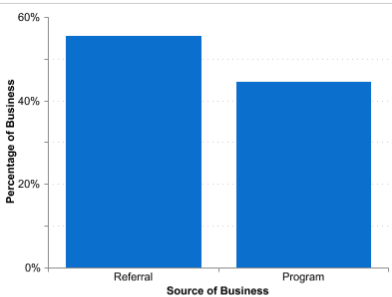
Find reports and dashboards... All Items ▼ All Types ▼

Action	Name ↑
	Source of Business (Programs and Referrals)
	Top Programs
	Top Referrals

The dashboards take calculated data from the source of business reports and display revenue statistics in graphs that can help you gain insight into your top providers at a glance.

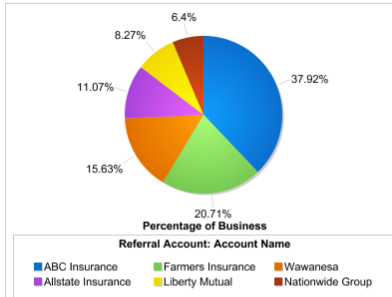
Source of Business (Programs and Referrals): These dashboards compare the percentage of total revenue earned from programs against referrals and more specifically, which programs or referrals were the top sources.

Percentage of Job Revenue (All Jobs)



Source of Business	Percentage of Business	Sum of Estimate Grand Total
Referral	55	\$101K
Program	45	\$81K
Total	100	\$182K

Percentage of Job Revenue (Top 10 Referrals)

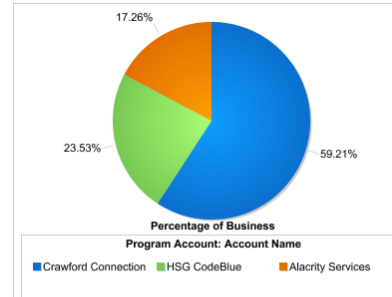


Top 10 Referrals - Click anywhere on the chart to review Referrals in greater detail

Referral Account: Account Name	Sum of Estimate Grand Total	Total Profit Amount
ABC Insurance	\$38K	\$15K
Farmers Insurance	\$21K	\$12K
Wawanesa	\$16K	\$7K
Allstate Insurance	\$11K	\$5K
Liberty Mutual	\$8K	\$3K
Nationwide Group	\$6K	\$190
Total	\$101K	\$43K

Summary \$ Totals represent Top 10 Referrals only - Click the 'Referral Account' header to review all Referrals in greater detail

Percentage of Job Revenue (Top 10 Programs)

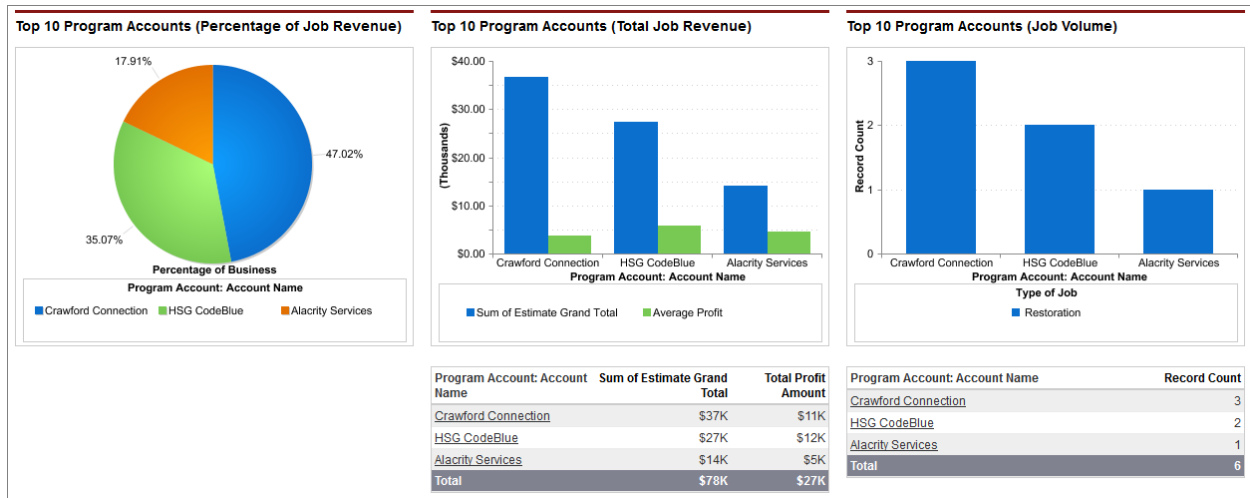


Top 10 Programs - Click anywhere on the chart to review Programs in greater detail

Program Account: Account Name	Sum of Estimate Grand Total	Total Profit Amount
Crawford Connection	\$48K	\$14K
HSG CodeBlue	\$19K	\$8K
Alacrity Services	\$14K	\$5K
Total	\$81K	\$27K

Summary \$ Totals represent Top 10 Programs only - Click the 'Program Account' header to review all Programs in greater detail

Top Programs: These dashboards will further break-down the percentage of job revenue earned from the top 10 program accounts into: total percentage of job revenue, total job revenue and total job volume by program.



Top Referrals: These dashboards will further break-down the percentage of job revenue earned from the top 10 referral accounts into: total percentage of job revenue, total job revenue and total job volume by referral source.



Source of Business Reports

Source of Business Reports	
<input type="text" value="Find reports and dashboards..."/> All Items ▾ All Types ▾	
Action	Name
<input type="checkbox"/>	Program Accounts by Number of Jobs This report shows Program Account work summarized by Type of Job. The report helps identify the volume and types of jobs that are received from Third Party Administrator Programs and entered in JobCheck.
<input type="checkbox"/>	Program Accounts by Revenue This report identifies the Program Accounts that refer new business to your company. Review the report to understand that total revenue and profit generated from your participation in Third Party Administrator Programs.
<input type="checkbox"/>	Programs vs Referrals by Revenue This report compares business value (\$) generated thru Programs, Referrals & Other Sources. Review the report to understand the % business, total revenue and profit generated from your Lead Source tracking in JobCheck.
<input type="checkbox"/>	Referral Accounts by Revenue This report identifies the Accounts that refer new business to your company. Review the report to understand the total revenue and profit generated from your insurance or other Business referrals tracked in JobCheck.
<input type="checkbox"/>	Referral Contacts by Revenue This report identifies the Contacts who refer new business to your company. Review the report to understand the total revenue and profit generated from your contact referrals tracked in JobCheck.

The source of business reports calculate the data that is used to populate the *Manager Dashboards*. When reviewing the manager dashboards, if you are interested in learning more about the statistics that are appearing in the dashboard, open the corresponding business report. Referral business is further broken-down into referrals from both accounts and contacts, independently.

Reports are generated based on progress totals that are entered into the progress column in the financial tab for closed and completed jobs. System reports have limited sorting capability; however, all reports can be exported to excel for more detailed sorting.

To ensure that your Manager Dashboards are always showing reliable data, your team must consistently do the following:

1. Create and update a financial plan for every job, including updating progress totals.
2. Update milestones to ensure that a completed job shows a status of 'completed'.
3. Close jobs when the work is complete.
4. Associate lead information in every job.

If you require your user profile to be modified to the Assured Manager profile, please ask your owner to contact us to have it changed.