Reports for Management

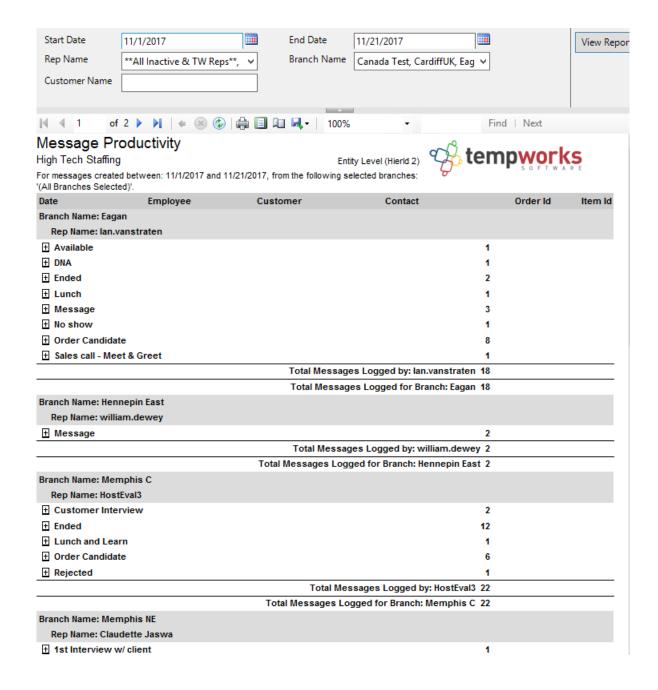Last Modified on 12/28/2021 9:47 am CST

Overview

This article reviews some of the top reports for your staffing management team. Whether you are a branch manager or an owner, the following reports can help you manage your user and review your database content. For an overview on how to find & run reports check out Welcome to Reports.

> ***Note*** You will need the correct Security Role in Enterprise or Security Group permissions in Beyond in order to view these reports. For more information, check out Reports & Administrators

Front Office Management Reporting

The following reports help track and manage your users that are interacting with employee, customer, order, and/or assignment records.

- If you are looking to review changes made to a certain record, utilize the Change Log Reports
- Use the Message Productivity Report to show which users have been logging what kind of messages. This is a great resource to see how many calls, emails, communications have been made by different service reps.
  - Check out the full list of productivity reports here.
- If you are looking for an overview of current assignments, check out the Assignment Register Report
- Utilize the Task Register Report to help manage tasks.

Start Date	11/1/2017		End Date	11/21/2017		View Report
Rep Name	**All Inactive & TW Reps**, ⌄		Branch Name	Canada Test, CardiffUK, Eag ⌄		
Customer Name						

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Message Productivity

High Tech Staffing

Entity Level (HierId 2)

tempworks SOFTWARE

For messages created between: 11/1/2017 and 11/21/2017, from the following selected branches: '(All Branches Selected)'.

Date	Employee	Customer	Contact	Order Id	Item Id
Branch Name: Eagan					
Rep Name: Ian.vanstraten					
⊞ Available				1	
⊞ DNA				1	
⊞ Ended				2	
⊞ Lunch				1	
⊞ Message				3	
⊞ No show				1	
⊞ Order Candidate				8	
⊞ Sales call - Meet & Greet				1	
		Total Messages Logged by: Ian.vanstraten		18	
		Total Messages Logged for Branch: Eagan		18	
Branch Name: Hennepin East					
Rep Name: william.dewey					
⊞ Message				2	
		Total Messages Logged by: william.dewey		2	
		Total Messages Logged for Branch: Hennepin East		2	
Branch Name: Memphis C					
Rep Name: HostEval3					
⊞ Customer Interview				2	
⊞ Ended				12	
⊞ Lunch and Learn				1	
⊞ Order Candidate				6	
⊞ Rejected				1	
		Total Messages Logged by: HostEval3		22	
		Total Messages Logged for Branch: Memphis C		22	
Branch Name: Memphis NE					
Rep Name: Claudette Jaswa					
⊞ 1st Interview w/ client				1	

Back Office Management Reporting

The following reports help track and manage payroll/billing related information. Check out Reports for Payroll & Billing for a more comprehensive list of reports for all back office users.

- The Management Report provides an overview of numbers for payroll, billing, and taxes for each branch.

- For a visual breakdown of payroll costs and expenses, check out the Expenses Report

- If you are looking for a peek into your gross profit, check out the Gross Profit Summary Report

- Need to look into the future? You can use the Hours Forecast Report to estimate upcoming hours and overtime trends

- Looking for total worker comp code costs in a payroll week? Check out the Worker Comp Summary Report

Start Date 6/1/2017   **End Date** 9/12/2017   View Report

Management
High Tech Staffing   Entity Level (Hierld 2)   **tempworks** SOFTWARE

Activity from 6/1/2017 through 9/12/2017 by Weekendbill Date

Branch: Memphis SW

Payroll		Billing		Taxes		
Employee Hours		**Billed Hours**		**Employee Taxes**		
					Amt Taxable	Amt Tax
RHours Paid	531.25	RHours Billed	580.50	OASDI	$8,263.73	$514.33
OHours Paid	5.00	OHours Billed	10.00	Medicare	$8,263.73	$120.28
DHours Paid	0.00	DHours Billed	0.00	Medicare Sup	$0.00	$0.00
Total Hours Paid	**536.25**	Total Hours Billed	590.50	State WH	$8,238.73	$394.08
				Federal WH	$8,238.73	$901.98
Employee Wages		**Billed Amounts**		EIC	$0.00	$0.00
Regular Pay	$8,467.70	Temp Billing	$13,949.10	City Local Tax	$0.00	$0.00
Vacation Pay	$0.00	Contractor Bill	$680.00	County Local Tax	$0.00	$0.00
Holiday Pay	$0.00	DH Billing	$4,500.00	School Local Tax	$651.23	$3.26
Bonus Pay	$0.00	Total Billing	$19,129.10	EE Other Tax	$0.00	$0.00
Other Pay	$0.00	Sales Tax	$193.53	Total		$1,933.93
Gross Pay	$8,467.70	Total	$19,322.63			
Employee Other		**Other Financial**		**Employer Taxes**		
Emp Deductions	$767.77	Gross Pay	$8,467.70		Amt Taxable	Amt Tax
Employee Taxes	$1,933.93	Net Pay Adjusts	$10.00	OASDI	$8,263.73	$512.35
Net	$6,166.00	Employer Taxes	$1,233.59	Medicare	$8,263.73	$119.82
Live Checks	$4,991.76	Workers Comp	$150.10	FUTA	$8,263.73	$49.58
Direct Deposit	$1,174.24	Benefits	$127.43	State FUTA Credit	$8,263.73	$0.00
Contractor Pay	$400.00	Cost of Sales	$10,388.82	SUTA	$8,446.93	$551.84
Number of Checks	16	Hours NonBill	-32.00	ER Other Tax	$0.00	$0.00
Avg Hours Worked	33.52	Temp GP	$3,960.28			
Avg Per-Hour Pay	$15.79	Temp GP Percent	28.39 %	Total		$1,233.59
Avg Per-Hour Bill	$23.62	Total GP	$8,740.28			
		Total GP Percent	45.69 %	**Fed Tax Deposit**		**$2,168.76**

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