

SERVICELINK DIRECT – REPORTING

OVERVIEW

In addition to a range of traditional printed reports, the system offers a general method of extracting information to spreadsheet in a simple fashion.

1. SPREADSHEET TRANSFER

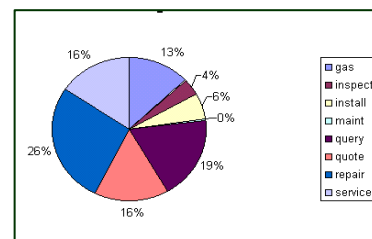
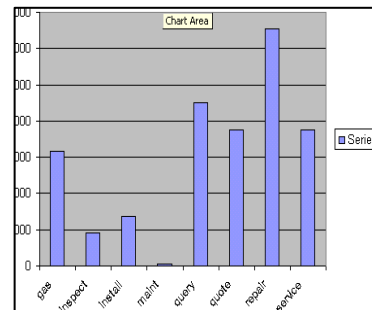
The ability to extract data from Servicelink to spreadsheet allows users to create analysis tables, charts , graphs as and when desired.

From selected ranges to jobs, all data about each job is transferred to a spreadsheet.

This includes

- Cost and invoice values
- All dates
- Customer contract
- Job category
- Description
- Address
- Priority
- etc

Cross analysis of job values by category allows comparative analysis of profitability by category , by area , by engineer etc



One of the options that makes it possible to quickly and easily extract data. Users choose a range of dates , contracts etc and select the items that they want from the job record details.

The screenshot shows the 'Dump Call Details to Excel' interface. It includes a 'File Options' section with checkboxes for Customer, Contract, Call Date, Category, Work Date, Completion Date, Deadline Date, Status, and Priority. A date range selector is set from 01/01/2000 to 31/12/2099. A list of fields to be exported is shown on the right, including CAL_NUMBER, CUS_CODE, CAL_NAME, CAL_ADDRESS1, CAL_ADDRESS2, CAL_ADDRESS3, CAL_ADDRESS4, CAL_POSTCODE, CNT_CODE, CAL_GRIDN, CAL_PLACEDBY, CAL_GRID, CAL_PHONE, CPD_CODE, CON_CODE, LOC_CODE, CAL_ABSTRACT, CAL_DESC, CAL_COMMENTS, CAL_INVOICEDESC, and CAT_CALL. Below the window, a 'Calls' menu is open, displaying a table of call records:

Created Date	Created Time
14/03/2012	09:10
16/04/2012	13:00
02/05/2012	16:21
22/05/2012	12:00
22/05/2012	13:10
22/05/2012	14:07
20/06/2012	11:16
02/07/2012	13:20
19/07/2012	14:03
19/07/2012	14:05
19/07/2012	14:38
19/07/2012	14:39
19/07/2012	15:10
19/07/2012	16:34
19/07/2012	16:40
19/07/2012	16:45
19/07/2012	16:46
30/07/2012	12:50
02/08/2012	08:50
03/08/2012	09:10
03/08/2012	09:10

From the main job screen , the data displayed can be copied to spreadsheet at the click of a button