

Monthly and Live Statistics



PestaRoo provides two types of ongoing analysis tools for your business. Monthly Stats look at a month-by-month snapshots of your business, while Live Stats look at your sales from within the current month.

Why Bother?

Without goals, how will you know where you are going? Without measures, how else will you evaluate your progress and the methods you are using? The most successful companies are always goal driven. Monthly Stats provide a place to enter your monthly goal and then show your progress toward that goal. Even better, it allows you to see what Services and/or Technicians generate the most invoice counts and total dollars. Both of these views can be printed and can be very useful for month-by-month comparisons. Monthly Stats are ideal for tracking your progress through the year, and for making same-month comparisons with last year's data.

Live Stats, on the other hand lets you look at your progress within the current month. Live Stats show your sales per Service Type for the current month up to only the current day. At the start of each new month they reset back to zero.

Access

Monthly Stats contains summary numbers about the business that you may not choose to share with all users. So, it is only available with Manager's Access, starting with PestaRoo version 2.22. To get to Monthly Stats: Home Page > Go to Managers Access > View Monthly Stats. Please note that you have to have set up your Manager Access Password before access is granted.

Live Stats are available from: Home Page > Select Regular Report... > View Live Stats by Service Type. Live Stats are available to all users. When you are looking at buttons on the reports layout, buttons with red lettering indicate that

a report will be printed. Blue lettering indicates it is going to display on the screen. In this case, View Live Stats has blue lettering so it is an 'on-the-screen' report. After you click on the button you may need to wait one or two minutes for the calculation to be completed, depending upon how many invoices you have and on how many service types you have selected. When the calculations are complete you can read your Live Stats.

Setting up Live Stats

Live Stats are only functional for the Service Types that you designate. By default, none are turned on. To turn on the Service Types you want to view, go to the Service Types Value List: Home Page > Edit Value Lists... > Service Types. Within this Value List you can turn 'on' each Service Type you want to track with live data. Click "Yes" under "Live Stats" to turn it 'on'. To turn it back off click 'No'.

There is a small performance cost for live stats so you probably won't want to turn on all Service Types. Instead you will probably want to pick your top ten or fifteen service types.

Using Live Stats

Your Live Stats are available on any day with a click. Remember that they constantly re-compile from that start of each month. So, on the 7th of June your Live Stats will show 7 calendar days of data. On the 20th of June your Live Stats will show 20 calendar days of data. Only posted invoice data is shown in Live Stats.

Each Service Type shown includes the count of invoices with that Service Type and the dollar total of Invoices (excluding any sales tax). Also note that each line includes a blue “jump” triangle to allow you to rapidly jump to those invoices for a closer look.

You can print Live Stats with the print button. Perhaps you’ll print these daily to track daily progress. Or, another common effective strategy is to print out Live Stats on every 15th of the month.

Setting up Monthly Stats

Monthly Stats are automatically live for every City, Service Type, and Technician in your system. There is nothing to turn on (except for Manager’s Access). Because of the way Monthly Stats are compiled, there is little or no performance hit for having them all ‘on’ all the time.

Using Monthly Stats

When viewing Monthly Stats you will land on a Monthly Stat Choose Name layout. From here you can click on “View Data” of the month of your choice or even select a different year and month. When you select a single month to view, note that you have a found set of all months for the chosen year. This lets you quickly scroll (if you have a mouse scroll wheel), or to click through the different months quickly on the “book-rolodex” over to the left. Only posted invoice data is shown in Monthly Stats. Dollars are based on the pre-tax (if any) amount. The invoice Service Date determines which Monthly Stat record it lands on.

If you are viewing a prior month, the values will be complete and accurate. If you are viewing the current month, the values will reflect all invoices posted so far this month. So, effectively, Monthly Stats give us much of the effect of Live Stats, but with more info.

On the view single month screen you have three tabs which each contain a portal showing your Stats: Cities, Technicians, or Service Types. Each of these present your data in dollar volume sorted order with the largest at the top. If

you have more than 15 items in either list you may scroll down to view additional records.

Each City, Technician, or Service Type shown includes: the Count of invoices, Total Dollars, Avg Dollar, and Average per Work Day. Also note that each line includes a blue “jump” triangle to allow you to rapidly jump to those invoices for a closer look.

Work Days and Goals

Notice that two of the data columns are averages by Work Day. This is very powerful because it allows meaningful comparisons between months with different numbers of workdays. The number of Work Days in a month is automatically calculated by PestaRoo. But for this to be accurate you need to enter the number of non-weekend holidays that your technicians don’t work. For some months this will be zero. For others, this might be 3 or 4. If the holiday lands on a weekend where you don’t normally work, don’t include it. The value you type in will be automatically subtracted from the Work Days, and then used in the ‘average’ calculations.

If you normally work Saturdays, subtract these days from the Holiday count. If the result is negative, type it in with a minus sign.

For each Month you can enter your Goal. If you are looking at the current month, the fractional goal displays below the portals.

YTD Data

Monthly Stats shows your total YTD (Year to Date) Dollars for the displayed month, and for the same month last year, and percent growth (or loss). Also shown, is the YTD Counts with Last Years Count and Percent growth.

Special Uses of Monthly Stats

If you pay your technicians by commission, monthly stats is a great place to go to view their sales.

From the Choose Name screen you can do a find on the June records for three successive years to do a multi-year comparison.

Rebuilding Monthly Stats

If you delete or import one or more invoices your Monthly Stats could be inaccurate. From Monthly Stat Choose Name click on “Rebuild Stats” for the month of concern. This script will clear the current stats and then examine every existing invoice whose Service Date corresponds to the Month and Year you are on. Then, each of those invoices will be resent to the Monthly Stats.

If you somehow get duplicates, Delete All Stats, Create New Months, and then Rebuild each.

Correcting Single Invoices

While reviewing your monthly stats you may find invoices assigned to the wrong technician, Service, or with the wrong Service Date. Here is how to correct those and maintain the accuracy of your Stats.

Go to the Invoice of concern. Switch to Tight List. Scroll to the right where you'll find two new Monthly Stat buttons: “**Remove**” and “**Resend**”. The **Remove** button takes them out of Monthly Stats. Next, make your correction to the invoice, and then **Resend**. Again, be sure to **Remove** before you make any changes.

Cities in Monthly Stats

The monthly stats by City is the newest Monthly stat feature. It compiles your data by the city of the location. The value of this data is that it lets you review the value of smaller communities that you drive a longer distance to. Another use for this is to evaluate a door hanger campaign for a specific town. With Monthly Stats you can easily view your City Sales before and after the promotional activity.