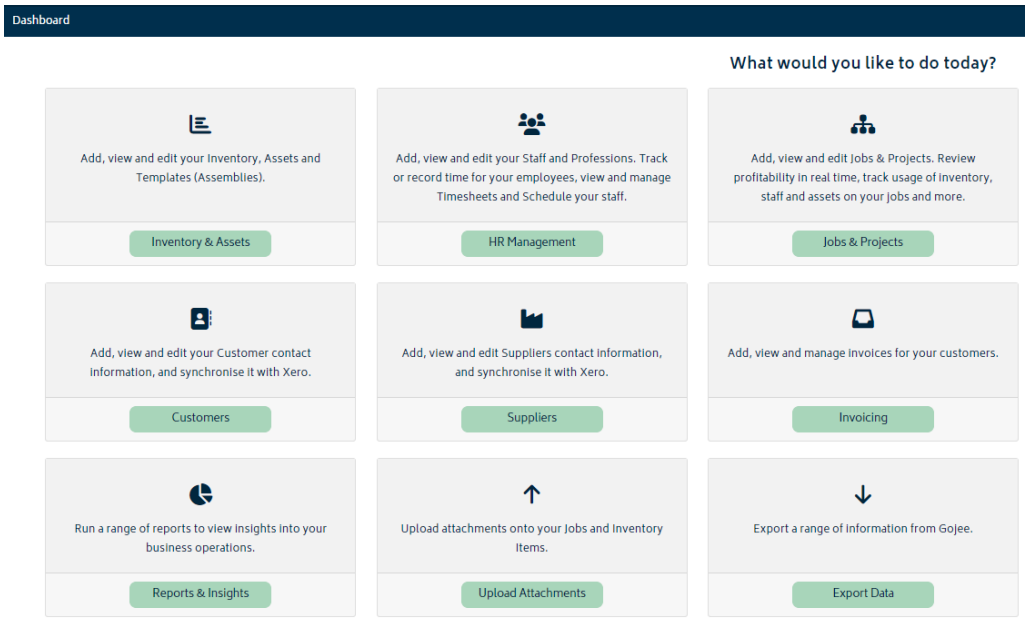
Knowledge Base

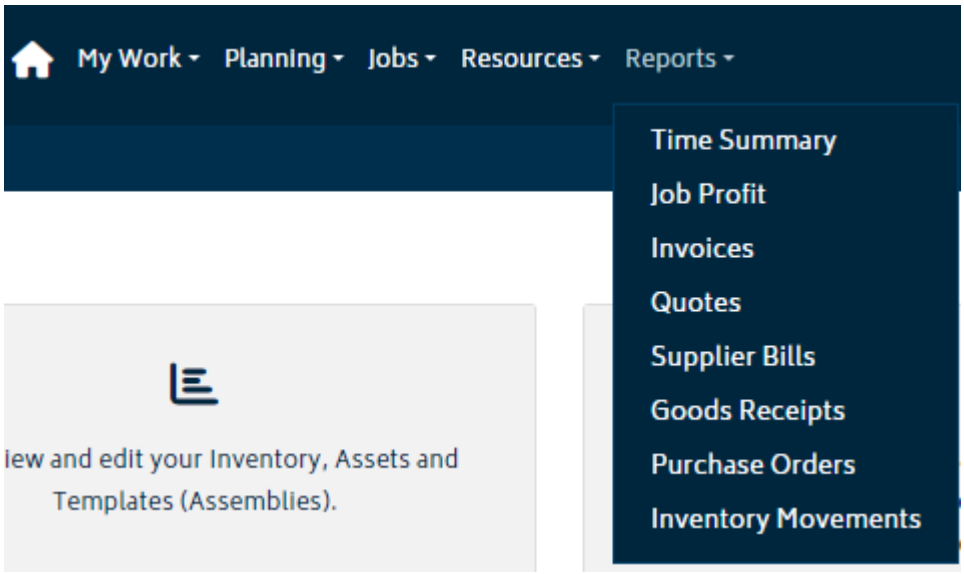
Reports and Insights

The reporting modules in Gojee allows business owners to view business performance in real time through a few clicks.

To access the reports, navigate to the Reports & Insight section of the home screen:

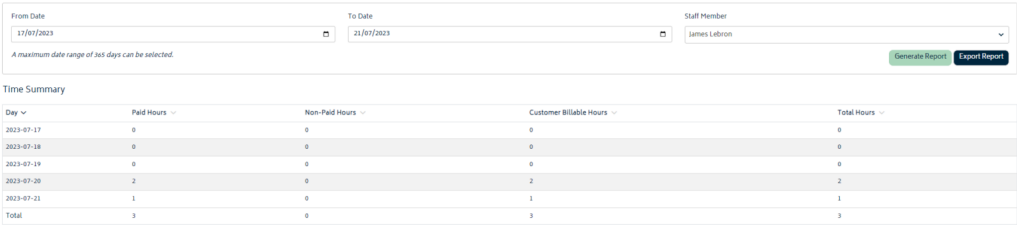


Reports can also be accessed through the top navigation menu:



Time Summary

Time summary report allows you to display your workers hours over a date range:



- Simply select the start and end date, as well as the workers name from the dropdown and then click Generate Report.
- The data will be displayed in the list.
- You can export the data shown in the list using the Export Report button. This will download the information in your browser in a CSV format.

Note: To learn how to track time for your employees, refer to the Time Tracking section.

Job Profit

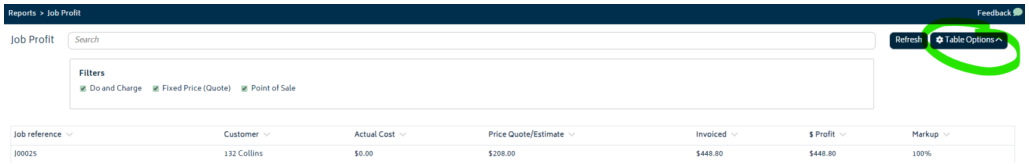
Job Profit generates a summary report for all jobs to see how they are performing in real time:

Reports > Job Profit Feedback

Job Profit Search Refresh Table Options

Job reference	Customer	Actual Cost	Price Quote/Estimate	Invoiced	$ Profit	Markup
J00036	Dave Ward	$0.00	$8.00	-	$0.00	---
J00023	bayside club	$100.00	$478.00	-	-$100.00	---
J00022	bayside clud	$6.57	$10.00	-	-$6.57	---
J00020	Dave Ward	$0.00	$108.00	-	$0.00	---
J00012	bayside club	$243.00	$1,933.01	-	-$243.00	---
J00010	bayside clud	$256.57	$1,760.06	-	-$256.57	---
J00007	132 Collins	$0.00	$177.06	-	$0.00	---
J00006	bayside club	$0.00	$1,812.87	-	$0.00	---
J00004	bayside club	$0.00	$1,852.07	-	$0.00	---
J00040	bayside club	$923.75	$724.80	$168.96	-$754.79	-81.71%
J00024	bayside club	$6.57	$221.00	$243.10	$236.53	3600.15%
J00032	bayside club	$297.00	$367.29	$404.02	$107.02	36.03%

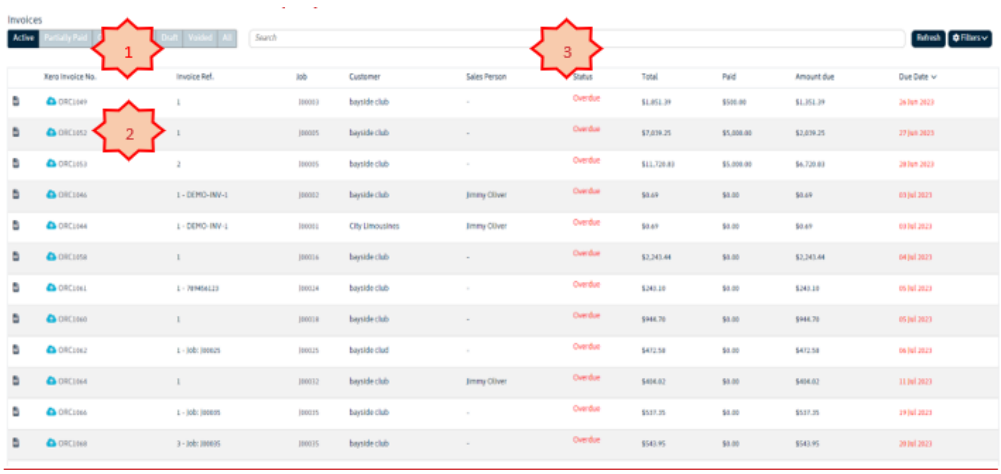
- The list can be sorted based on “Actual Cost”, “Price Quote/Estimate”, “Invoiced”, “$ Profit” and “Markup”. Simply click on these headers to sort the list.
- You can search for a job through Reference Number or Customer Name using the search bar at the top of the page.
- The Table Options button allows you to filter the list to different types of jobs:



- To see the full financial breakdown of any job in the list, simply click on the row and you’ll be navigated to the job review page for that job (refer to Job Actions for more information).

Invoices

Invoices report allows you to view all the invoices that were raised against the jobs/projects through Gojee. All these invoices are searchable and presented based on invoice status(es) from Xero:



The numbered items in the report are described below:

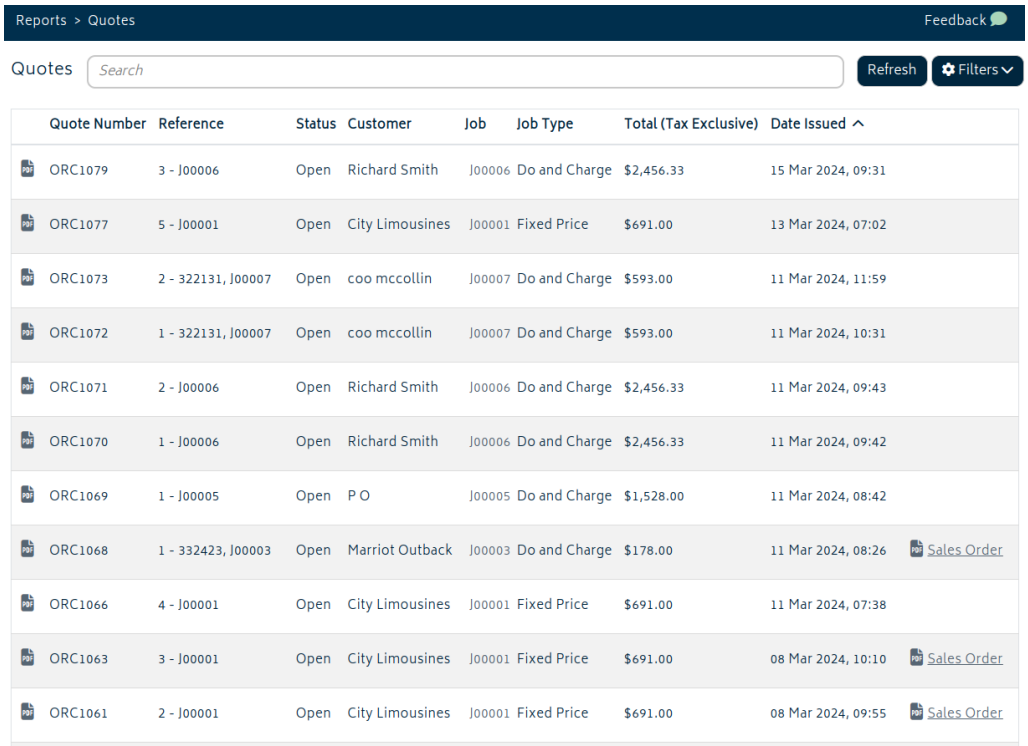
1. **Status Filter:** By default, the system displays all the Active invoices however you can select different invoice status(es) to view different invoices:
    1. Partially Paid
    2. Overdue
    3. Paid
    4. Draft
    5. Voided
    6. All
2. **Xero Deep Link:** Displays the link for you to open and view the invoice inside Xero.
3. **Search Bar:** The search bar allows you to search for an invoice using invoice number, customer name or sales person.

Note: You can click on any invoice in the list to open the invoice edit page.

To learn more about creating invoices, editing existing invoices, refer to the Invoices section.

Quotes & Estimates

Quotes and Estimates provides a view of all the quotes and estimates created in Gojee. By default, all the Quotes and Estimates are sorted based on their “Issue Date.” The report displays the status(es) of these Quotes and Estimates for better tracking. If a sales order exists for a quote, it will be displayed alongside the quote.



Quote Number	Reference	Status	Customer	Job	Job Type	Total (Tax Exclusive)	Date Issued	
ORC1079	3 - J00006	Open	Richard Smith	J00006	Do and Charge	$2,456.33	15 Mar 2024, 09:31	
ORC1077	5 - J00001	Open	City Limousines	J00001	Fixed Price	$691.00	13 Mar 2024, 07:02	
ORC1073	2 - 322131, J00007	Open	coo mccollin	J00007	Do and Charge	$593.00	11 Mar 2024, 11:59	
ORC1072	1 - 322131, J00007	Open	coo mccollin	J00007	Do and Charge	$593.00	11 Mar 2024, 10:31	
ORC1071	2 - J00006	Open	Richard Smith	J00006	Do and Charge	$2,456.33	11 Mar 2024, 09:43	
ORC1070	1 - J00006	Open	Richard Smith	J00006	Do and Charge	$2,456.33	11 Mar 2024, 09:42	
ORC1069	1 - J00005	Open	P O	J00005	Do and Charge	$1,528.00	11 Mar 2024, 08:42	
ORC1068	1 - 332423, J00003	Open	Marriot Outback	J00003	Do and Charge	$178.00	11 Mar 2024, 08:26	Sales Order
ORC1066	4 - J00001	Open	City Limousines	J00001	Fixed Price	$691.00	11 Mar 2024, 07:38	
ORC1063	3 - J00001	Open	City Limousines	J00001	Fixed Price	$691.00	08 Mar 2024, 10:10	Sales Order
ORC1061	2 - J00001	Open	City Limousines	J00001	Fixed Price	$691.00	08 Mar 2024, 09:55	Sales Order

- You can click search the Quotes and Estimates based on the reference number along with customer names.
- To learn more, refer to the Quotes and Estimates section.

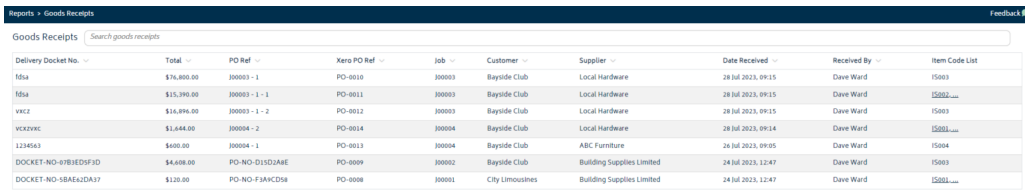
Supplier Bills

The supplier's bills report allows you to view all the supplier bills that you have entered into Gojee. By default, the supplier bills are sorted based on the issued date. Refer to this link for more information Purchasing.

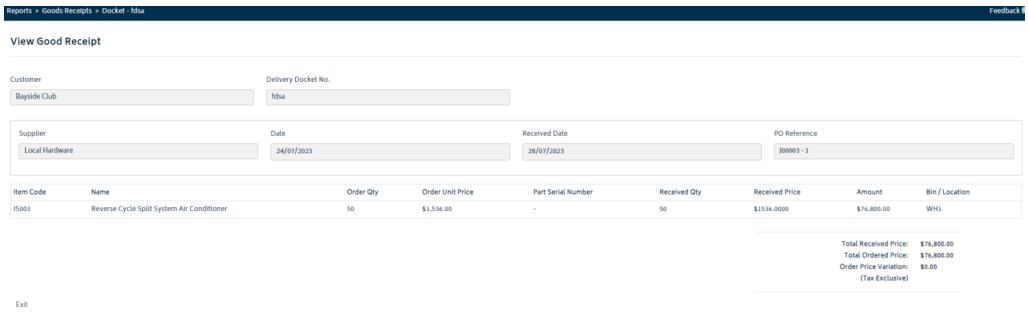
1. Clicking at the view in Xero option, allows you to view the supplier's bill inside Xero.
2. Clicking Document Link, opens the pdf of the supplier's bill for your view.

Goods Receipts

This report allows you to view all the good receipts after you have received the purchase orders. Refer to this link for more information Purchasing.



Clicking each of the Goods Receipts provide you details:



Purchase Orders

Purchase Orders displays all the existing purchase orders in your Gojee account based on different status(es), by default, you will be shown Purchase Orders that are "Awaiting Shipment" however you can always toggle between different status(es) to view Purchase Orders sitting in different status(es).

You can always click "All" to view all the Purchase Orders regardless of the status.

The numbered items in the image above are described below:

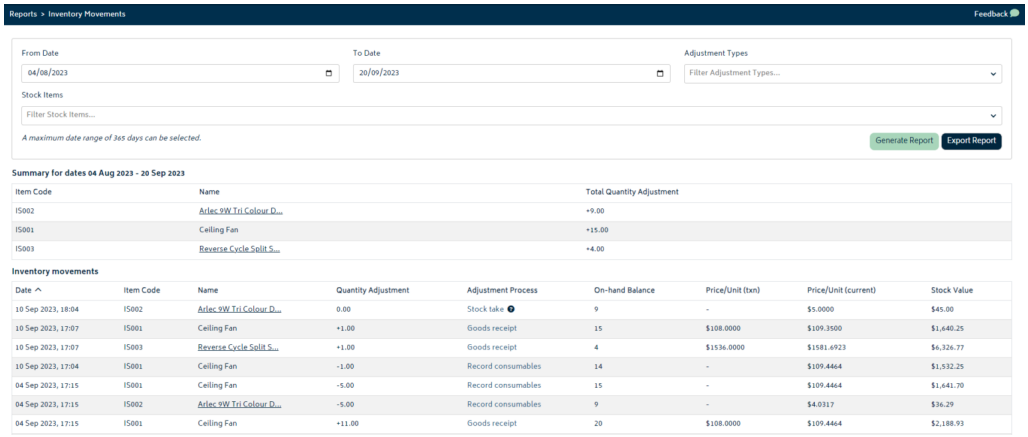
1. Click on different status(es) to view the Purchase Orders based on status.

2. Search for a particular PO using PO#, Customer Name, Supplier Name or Job Reference Number.
3. Allows you to click the link and view the Purchase Order in Xero.
4. Click the link to view the PO in pdf format.
5. Click on “Receive” or “Bill” for taking actions against a PO.

Refer to this link for more information Purchasing.

Inventory Movements

This report allows you to see all movements of all of your tracked inventory items. This is useful to see how many items were sold in a certain period, what was purchased etc.



- Select the parameters of the report:
-
    - Choose a date range of interest
    - Choose an Adjustment Type (optional – if none is chosen all will show)
    - Stock Item (optional – if none is chosen all will show)
- Hit the Generate Report button. The results will be shown in the list.
- Export the data shown on the page using the export button.

Explanation of Adjustment Types:

- Stock Take
    - Records the details of a manual stock take
- Goods Receipt
    - Records when an item is received from a PO into stock
- Record Consumables
    - Records when an item is consumed onto a Job. For POS jobs this happens automatically, so this is a proxy for sales in the period.
- Return to Stock
    - Records when an item is removed from a job and brought back to stock.

Next: Back to Knowledge Base.