

Pro Summary

The Pro Summary dashboard is meant to give a combination of useful KPI's at a glance. There are additional reports available that will go into further detail in any given area if needed.

This dashboard also provides comparative data to the period you select in the date range. In the image below, you can see some basic comparison in the Average Invoice KPI Box. The green up arrow tells you that your Average Invoice is up compared to the previous year. The portion of the KPI Box that says 'Previous:' tells you the comparative Average Invoice from last year.

Additionally, hovering over the up or down arrow in the KPI Box expands on the date ranges in a tooltip.

The screenshot displays the 'PRO SUMMARY' dashboard with the following KPI boxes:

- Invoice Count:** 121.00 (Previous: 305.00)
- Revenue Total:** 76,529.47 (Previous: 181,836.88)
- Net Total:** 74,072.04 (Previous: 174,255.83)
- Other Charges:** 2,457.43 (Previous: 7,581.05)
- Taxes:** 3,445.72 (Previous: 5,201.60)
- Hours Sold:** 179.39 (Previous: 701.08)
- Hours Presented:** 195.86 (Previous: 893.63)
- Average Hours Billed:** 1.48 (Previous: 2.30)
- Average Invoice:** 632.47 (Previous: 596.19) - *Green up arrow*
- Effective Labor Rate:** 145.95 (Previous: 141.19)
- Closing Ratio:** 0.88 (Previous: 0.88) - *Red down arrow*
- Total Opportunity:** 87,365.70 (Previous: 432,001.10)
- Average Opportunity:** 722.03 (Previous: 1,416.40)
- Deferred Total:** 10,836.23 (Previous: 250,164.22)
- Deferred Average:** 89.56 (Previous: 820.21)
- Deferred Hours:** 16.47 (Previous: 192.55)

Below the KPI boxes are three detailed tables:

Profit Summary - No Tires or Batteries								
Line Type	Total	Discount	Taxable	Net Total	Cost	GP%	GPS	
Labor	\$20,267.34	\$305.91	\$0.00	\$20,267.34	\$19,009.48	\$2,719.93	85.69%	\$16,289.55
Material	\$6,043.46	\$60.46	\$6,043.46	\$0.00	\$5,732.34	\$3,190.66	48.34%	\$2,541.68
Sublet	\$216.20	\$0.00	\$0.00	\$216.20	\$216.20	\$225.00	-4.07%	(\$8.80)
Subtotal	\$26,527.00	\$366.37	\$6,043.46	\$20,483.54	\$24,958.02	\$6,135.59	76.87%	\$18,822.43

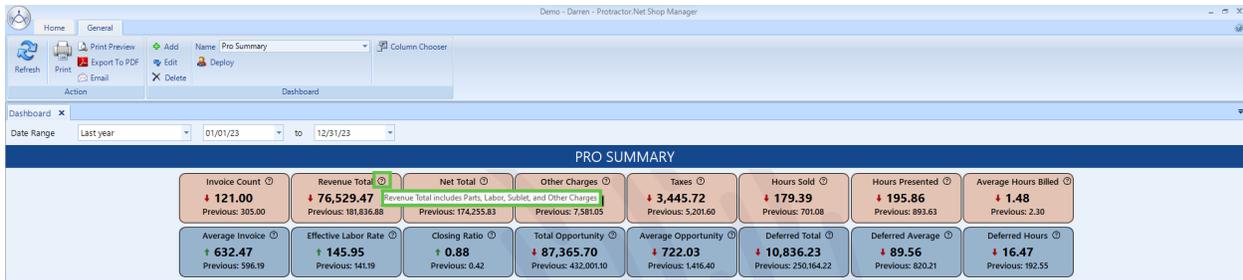
Profit Summary - Only Tires and Batteries								
Definition	Total	Discount	Taxable	Non-Taxable	Net Total	Cost	GP%	GPS
Tire	\$14,026.48	\$0.00	\$14,026.48	\$0.00	\$14,026.48	\$4,883.94	65.18%	\$9,142.54
Vehicle Battery	\$1,799.44	\$0.00	\$1,799.44	\$0.00	\$1,471.54	\$540.44	63.27%	\$931.10
Subtotal	\$15,785.92	\$0.00	\$15,785.92	\$0.00	\$15,498.02	\$5,424.38	65.64%	\$10,073.64
Total	\$42,312.92	\$366.37	\$21,829.38	\$20,483.54	\$40,456.04	\$11,559.97	72.68%	\$28,896.07

Other Charge Invoice Summary			
Type	Code	Name	Amount
Other Charge	-	Shop Supplies	\$2,346.87
Other Charge	C2	OC Discount Per Item	(\$723.76)
Other Charge	C3	OC Discount Percent of Parts/Labor Per Invoice	(\$312.29)
Other Charge	R	RH Test	\$656.08
Other Charge	T	Tire Disposal Charge	\$200.00
Tax	S	State Sales Tax	\$3,290.66
Tax	T1	State Battery Tax	\$2.00
Tax	T2	State Tire Tax	\$2.00

Cash Receipt Balance	
Name	Amount
Invoice Total	\$72,953.54
Credit Invoice Total	(\$1,951.34)
Receivable Charged	(\$5,966.07)
Receivable Payment	\$6,001.37
Deposit Received	\$1,906.81
Deposit Released	(\$3,037.28)
Deposit Used	(\$202.01)
Cash Paid Out	(\$10.00)
Payment To Supplier	\$0.00
Adjustment	\$100.00
Cash	\$2,439.38
Debit	(\$60,490.30)
Direct	\$2,000.00
Discover	\$178.07
Master Card	(\$24.49)
MasterCard	(\$535.27)
On Account	(\$1,455.96)
Visa	(\$9,116.68)
Cash Receipts Total	\$67,005.25
Cash Receipts Deposited	(\$3,719.70)
Cash Receipts Remaining	\$70,724.95
Outage	\$0.00

Each of the KPI Boxes also has a ? in the upper right corner. Hovering your mouse over this ? makes a tooltip appear giving more information about how the KPI is calculated.

In the screenshot below, hovering over the ? next to Revenue Total tells you information that will help you compare it to Net Total.



In the Profit Summary portions, the topmost rows give you your shops Labor, Material, and Sublet revenue totals. The material row in this portion excludes Tires and Batteries.

The bottom pair of material rows break out Tire and Battery sales (material only) based on material sales where the PCDB part definition is set to 'Tire' and 'Vehicle Battery' is used respectively.

In most cases, the Taxable and Non-Taxable figures are meant to help you catch when taxes are not being applied properly. If any labor, material, or sublet line on an invoice had a single tax applied to them, they will appear as Taxable. If you are in a jurisdiction where multiple taxes can apply to a single line, you should not use the Pro Summary for tax remittances. You should also compare them to the appropriate tax reports in Protractor.

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Sublet	\$216.20	\$0.00	\$0.00	\$216.20	\$216.20	\$225.00	-4.07%	(\$8.80)
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Subtotal	\$15,785.92	\$0.00	\$15,785.92	\$0.00	\$15,498.02	\$5,424.38	65.64%	\$10,073.64
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Other Charge Invoice Summary			
Type	Δ	Code	Amount
Other Charge	*		Shop Supplies
Other Charge	C2		OC Discount Per Item
Other Charge	C3		OC Discount Percent of Parts/Labor Per Invoice
Other Charge	R		RH Test
Other Charge	T		Tire Disposal Charge
Tax	S		State Sales Tax
Tax	T1		State Battery Tax
Tax	T2		State Tire Tax

Lastly, this dashboard can be loaded as long as you have 'view' and 'modify' permissions in your user or role security.

From the main ribbon, click on dashboards. Next, click 'Add' in the vertical stacked dashboard options. In the dropdown menu, select Pro Summary. You must type in a name in the name field, then press ok. Your dashboard should populate after a moment.

The screenshot displays the Protractor Net Shop Manager interface. At the top, there is a navigation bar with 'Home' and 'General' tabs. Below this is a toolbar with options like 'Refresh', 'Print', 'Export To PDF', 'Email', 'Add', 'Edit', and 'Delete'. The main area is titled 'Dashboard' and shows a 'Date Range' set to 'Last year' from '01/01/23' to '12/31/23'. The central focus is the 'PRO SUMMARY' dashboard, which consists of several summary cards and two tables.

Summary Cards:

- Invoice Count:** 121.00 (Previous: 395.00)
- Revenue Total:** 76,529.47 (Previous: 181,836.88)
- Net Total:** 74,072.04 (Previous: 174,235.83)
- Other Charges:** 2,457.43 (Previous: 7,581.05)
- Taxes:** 3,445.72 (Previous: 3,201.60)
- Hours Sold:** 179.39 (Previous: 701.08)
- Hours Presented:** 195.86 (Previous: 893.63)
- Average Hours Billed:** 1.48 (Previous: 2.30)
- Average Invoice:** 632.47 (Previous: 596.19)
- Effective Labor Rate:** 145.95 (Previous: 141.19)
- Closing Ratio:** 0.88 (Previous: 0.42)
- Deferred Total:** 10,836.23 (Previous: 250,164.22)
- Deferred Average:** 89.56 (Previous: 820.21)
- Deferred Hours:** 16.47 (Previous: 192.35)

Tables:

Profit Summary - No Tires or Batteries

Line Type	Total	Discount	Taxable	Non-Taxable
Labor	\$20,267.34	\$305.91	\$0.00	\$0.00
Material	\$6,043.46	\$60.46	\$6,043.46	\$0.00
Sublet	\$216.20	\$0.00	\$0.00	\$0.00
Subtotal	\$26,527.00	\$366.37	\$6,043.46	\$0.00

Profit Summary - Only Tires and Batteries

Definition	Total	Discount	Taxable	Non-Taxable	Net Total	Cost	GP%	GPS
Tire	\$14,026.48	\$0.00	\$14,026.48	\$0.00	\$14,026.48	\$4,883.94	65.18%	\$9,142.54

A modal window is open in the center, titled 'New Dashboard', with a search field containing 'Pro Summary'. The search results list 'Pro Summary' as a dashboard type. The modal has 'OK' and 'Cancel' buttons.

If you need any additional assistance or have questions, please contact support.

Thank You,

Protractor Software

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