

# Gross Margin Report

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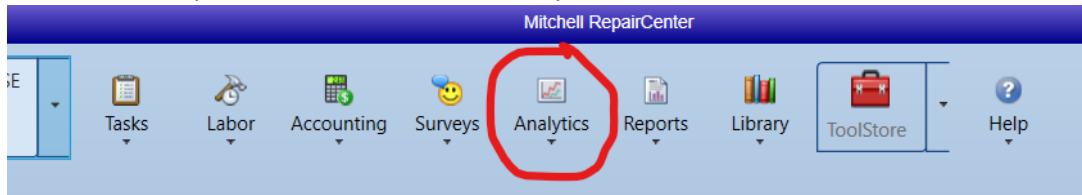
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# Gross Margin Report

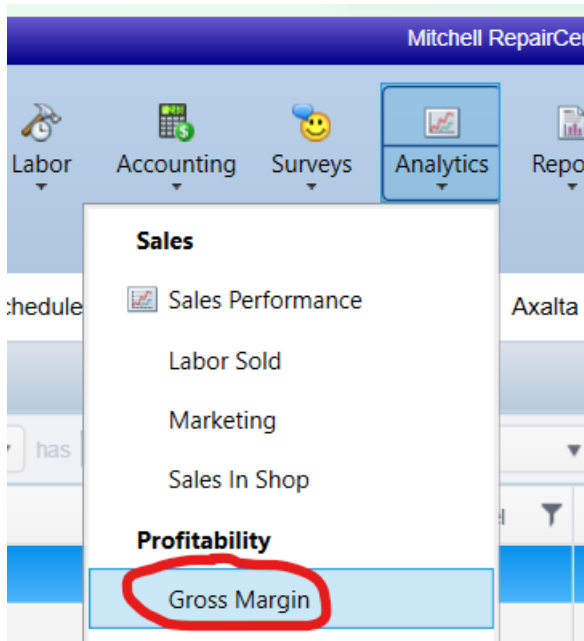
## Accessing the Gross Margin Report

Found in Repair Center, this report allows you to track/manage your monthly projected sales.

1. Open Repair Center.
2. Click on the drop down arrow under the “Analytics” tab.



3. Select “Gross Margin”.

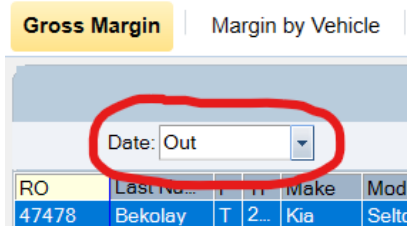


# Gross Margin Report

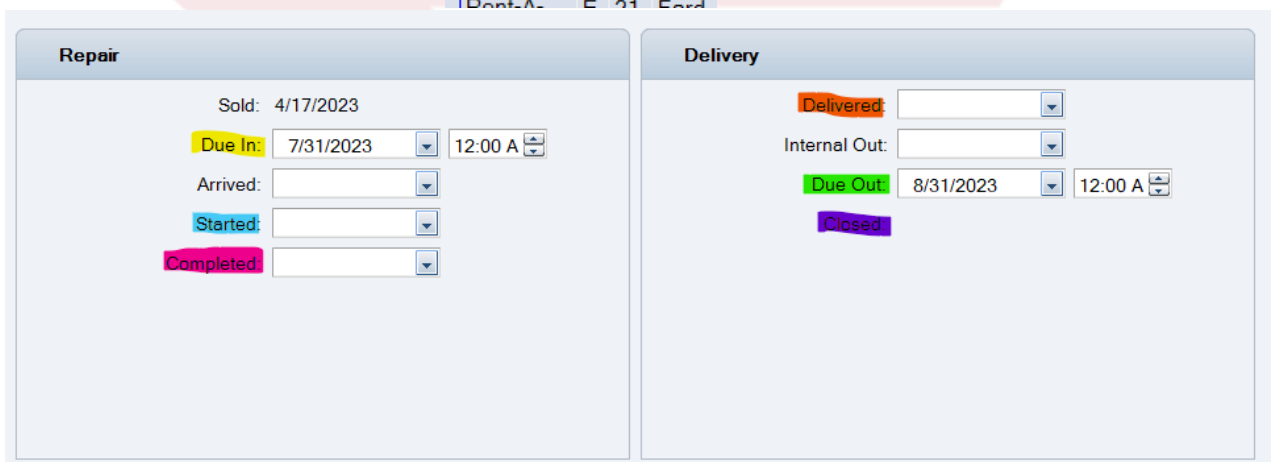
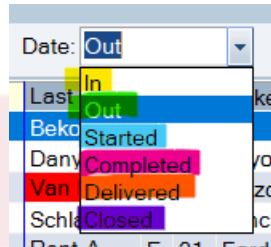
## Understanding the Report

There are a number of different elements that can manipulate the report.

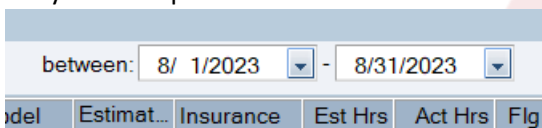
1. The "Date" drop down box determines which dates the report will be based on.



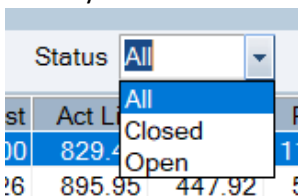
2. These dates are pulled from each individual RO as you have entered them in.



3. In order to get an accurate estimate for monthly sales, always select by "Due Out" dates.
4. Set your date parameter for the entire month.



5. Select your status as "All".



6. If you select "Closed" or "Open" it will only pull the jobs that have already been closed, or are still open.
7. The final option, "Select", can be ignored. Ensure it is always selected as "All".

# Gross Margin Report

Select	All
Profit \$	All
754.64	Make
135.14	Estimator
448.38	Insurance Company
	Agent

- Click "Apply Filter".
- The bottom of the page will give you a break down of all the jobs selected by your criteria.
- The amount shown under "Est List" shows your current sales for the month.

Est Hrs	Act Hrs	Flg Hrs	Est List	Act List	Cost	Profit \$	Profit %
941.90	29.66	191.06	175,995.07	85,134.44	49,359.97	126,635.10	72.0

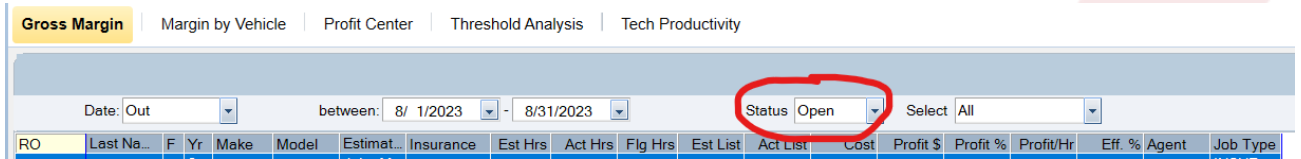
Profit/Hr	<input type="radio"/> by Actuals	Taxes	Profit/sq ft	Efficiency
662.80	<input checked="" type="radio"/> by Flagged	18,986.35	0.00	3,175.7

- This amount is also the balance that generates on the Generis Report every day. Because of this, it is important to keep your dates accurate, so you have an accurate estimate of your sales and know if you will hit budget.

# Gross Margin Report

## Month End Closing

1. Change your "Status" tab to "Open".
2. This will show jobs that are due out for the end of the month, but still open.



The screenshot shows a software interface for a Gross Margin Report. At the top, there are tabs for "Gross Margin", "Margin by Vehicle", "Profit Center", "Threshold Analysis", and "Tech Productivity". Below the tabs, there is a search and filter section. The "Date" is set to "Out", and the "between" dates are "8/ 1/2023" and "8/31/2023". The "Status" dropdown menu is highlighted with a red circle and set to "Open". The "Select" dropdown menu is set to "All". Below the search and filter section, there is a table with the following columns: RO, Last Na..., F, Yr, Make, Model, Estimat..., Insurance, Est Hrs, Act Hrs, Flg Hrs, Est List, Act List, Cost, Profit \$, Profit %, Profit/Hr, Eff. %, Agent, and Job Type.

3. These jobs will either need to be closed in time for the month end deadlines, or have their "Due Out" date changed if they will not be done.