



Ascente Service Dispatch

Advertising Tracking & Reporting

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www.compusource.com

<http://www.servicecontractorsoftware.com/>

Ascente – Service Advertising Tracking & Reporting

Overview

This presentation will show you the Advertising Source Tracking and Reporting capabilities in the Ascente – Service Module.



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Overview

You will be able to determine the following information based on the results of service invoicing:

- Totals by Branch and Advertising Code
- By Invoice Date Range
- Call Counts
 - Total Calls Count
 - Money Calls Count
 - Cancelled Call Count
- Sales
 - Total Sales
 - Average Sales per Call
 - Percentage of Branch Sales
 - Percentage of Total Sales



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Assumptions

The primary assumption is that your call takers are *ALWAYS*:

- Prompting the callers for how they found your company. Call takers should not be making assumptions.
- Selecting the appropriate Advertising Codes (AD ID's) for that service order as determined by the caller that you have already setup.



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Setup

Advertising Codes

An Ad Code needs to be setup for all your marketing sources and every possible response by the callers when prompted “*How did you find us?*”

Don't forget to add these Ad Codes:

- Customer Referral
- Maintenance Contract
- Existing Customer



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Setup

Advertising Codes

Ad Maintenance

Ad Pac Bell LA

General

Description Pac Bell - LA

Branch California

Publication Pac Bell Yellow Page

Coverage

Classified

Size

Monthly Cost 0.00

Yearly Cost 0.00

Begin 1/1/2000

End 1/1/2000

Created: 1/1/1900 Changed: sa 10/20/2020 8:50:57 At 10/20/2020 9:10 AM

Branch

If the ad determines the branch responsible for the service call, enter the branch here. If the type or geographic region determines the branch, leave this field blank.

Ad

These are the advertising codes that the call takers will be selecting for each service order and that the Advertising Report will use.

Description

This is the advertising code description that will print on the Advertising Report.

Other Fields

These fields are not used and will not print on the Advertising Report. You can use these if you like.

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Setup

Service Dispatch Options and Interfaces

Service Dispatch Options and Interfaces Maintenance

Service Defaults | **Service Options** | Dispatch | Scheduling | Maintenance Defaults | Work Order | Invoice | Payroll | User Defined Fields

Options

- Allow Users to Change Service Order ID
- Update Jobsite with New Service Order
- Automatically Create Work Order with Service Order
- Automatically Print New Service Orders
- Require Ad**
- Allow Dispatch/Arrive status in Call Taking
- Amortize Contracts
- Allow Billing on Service Contracts
- Fringe Overlay
- Burden Overlay

Require Ad
Check this box if the Call Taking program should force the user to enter a valid Ad code before a call can be saved.

Changed: sa 7/22/2020 6:09:28 AM | 10/20/2020 4:14 PM

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Setup

Service Dispatch Options and Interfaces

Service Dispatch Options and Interfaces Maintenance

Service Defaults | Service Options | Dispatch | Scheduling | **Maintenance Defaults** | Work Order | Invoice | Payroll | User Defined Fields

Defaults

Trouble: Maintenance

Bill Type: Maint - Revenue

Service Order Status: MS - Maint Sched

Work Order Status: Open

Maintenance: Billable

Tax Class: 0 NonTaxable

Ad: Maintenance Contract

Create Maint SO's Out: 999 days

Material Defaults

Bill Material Separately:

Bill Type: []

Tax Class: []

Part Description: []

Ad
Enter the Ad code to be used for maintenance contracts

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Operations

Call Taking

Call Taking

Service Order: LA010518 Call Taken By: sa Date: 8/25/2020 Time: 10:06 AM

Quote: Q100090 Recalc Pricing Recalc Taxes

General | Billing | Invoice | Tech Log | Scheduling

Trouble: AC Type: Air Conditioning

Problem: Quote: Q100090 approved on 8/25/2020
CLI-metrics test

Jobsite: *Existing Jobsite* Update Jobsite

Jobsite: Austin Cox Lot 123

Name: Austin Cox

Address 1: 123 Crab Tree

Address 2:

City: Salisbury Region: MD

Postal Code: 21802 Country: USA (310)

Email: remy@austincoxmd.net

Service Order:

Comments:

Ad: Pro-Ads Terms: 10 10 Days

Price Level: Regular Tax Group ID: LA La County

Branch: LA Dept: Service

Maint: Billable PO:

Own/Rent:

Invoice:

Scheduling:

Technician: (Unassigned)

Priority: Regular

Zone: Los Angeles

Est. Hours: 1.00

Prom Date: 8/25/2020

Prom Time: Anytime

Scheduled: Open-Mapped - 8/25/2020 Anytime

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Ad
From the Call Taking form, this is the Ad Code required by the Advertising Report.

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Operations

Quotes

Quote Entry

Quote: Q100090 Entry Date: 8/25/2020 Service Order: LA010518

Description: Cli-metrics test

Sales: 5,000.00
Cost: 500.00
Profit: 4,500.00 90%

Main | Billing | Marketing | Detail | Totals | Activity

Jobsite

Existing Jobsite Update Jobsite

Jobsite: Austin Cox Lot 123
Name: Austin Cox
Address 1: 123 Crab Tree
Address 2:
City: Salisbury Region: MD
Postal Code: 21802 Country: USA (310)
Email: remy@austincoxmd.net

Defaults

Component: AC1
Service Order Type: Air Conditioning
Ad: Pro-Ads
Branch: LA
Department: Service
Invoice Method: Time & Material
Price Level: Regular
Quote Bill Type: NonStockedParts
Technician: (Unassigned)
Salesperson: REM Remy
Location: California Shop

Type	Phone Number	Extension	Contact
Primary	(410) 111-2222	999	pcontact
Secondary	(410) 222-3333	888	scontact
Fax	(410) 698-8765	987	FContact

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Operations

Ad Analysis Report

	Beginning	Ending
Branch	(Beginning)	(Ending)
Ad	(Beginning)	(Ending)
Invoice Date	1/1/2018	12/1/2018

Invoice Date Range
This report will select service order history records based on the invoice date assigned when invoiced using the *Prebill Register* process.

Field Selections
Report Name: Ad Analysis Report

Options
 Print Options Cover Page

10/20/2020 4:39 PM

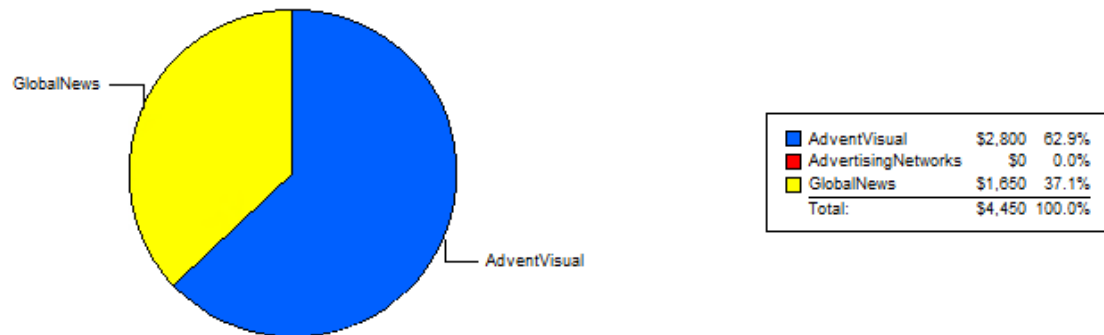
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Operations

Ad Analysis Report

LA								
Ad ID	Description	Total Calls	Money Calls	Cancelled Calls	Total \$	Average \$ Per Call	% Branch Sales	% Total Sales
AdventVisual	Advent Visuals	6	6	0	2,800.00	466.67	62.92%	58.84%
AdvertisingNetwork	Advertising Network	1	0	0	.00	.00	.00%	.00%
GlobalNews	Global Newspapers	1	1	0	1,650.00	1,650.00	37.08%	34.67%
Totals for: LA		8	7	0	4,450.00	635.71	100.00%	93.51%

Sales by Ad by Branch
For LA



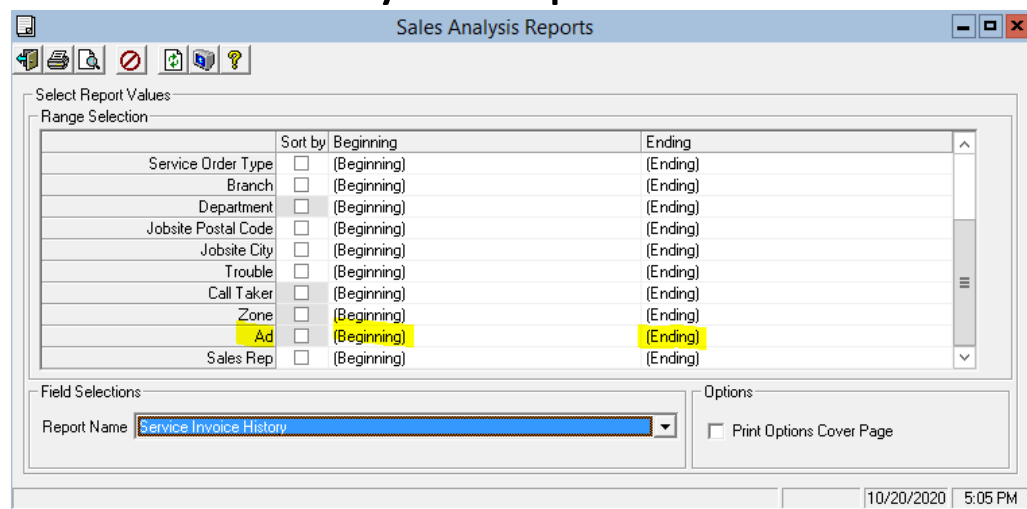
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Operations

Sales Analysis Reports

These reports all have a runtime option by Ad Code. This allows you to run these reports and filter them by the Ad Code to get more details than the Ad Analysis Report provides.

- Service Invoice History
- Service Profitability Recap
- Service Sales Recap



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Considerations, Recommendations & Questions ...

Review Operator Results

Print the Ad Analysis Report and verify that your operators are capturing the actual Ad Codes provided by the callers. It is not unusual to have operators just select the 'Existing Customer' Ad Code because they do not want to ask the caller.



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Considerations, Recommendations & Questions ...

Only Invoiced Service Calls are Reported

The Ad Analysis Report only selects service order history records that resulted from invoiced service orders through the Prebill Register process.



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Considerations, Recommendations & Questions ...

Reporting is based on the Invoice Date

The Ad Analysis Report selects records based on the invoice date, not when the call was added, or the work was done.



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Considerations, Recommendations & Questions ...

Verify the Ad Code before Invoicing

You can't change the Ad Code after the service order has been invoiced. If you want it corrected, you will need to credit the original invoice and then reinvoice it with the correct Ad Code. You don't want to have to do that.



Thank You!

We thank you for attending this webinar or watching this video and for choosing Ascente.

Please let us know if you have any questions or would like a follow-up call to discuss this in more detail.

More training videos like this are available on our website www.compusource.com

<http://www.servicecontractorsoftware.com/>

