1801: Daily Operations Report

1800: Misc. Operating Reports · https://milo.masseyservices.com/docs/1801-daily-operations-report/

Section: Misc. Operations Reports
Subject: Daily Operations Report
Approved by: Eddie Faircloth
Effective Date: 1 March 1999
Last Reviewed Date: 1 March 1999
Policy Owner:

Policy

The Daily Operations Report (DOR) is a valuable Management tool. On a daily and month-to-date basis, it is used for reporting and monitoring the following areas of our business:

Sales (future revenue)

Production (Current revenue)

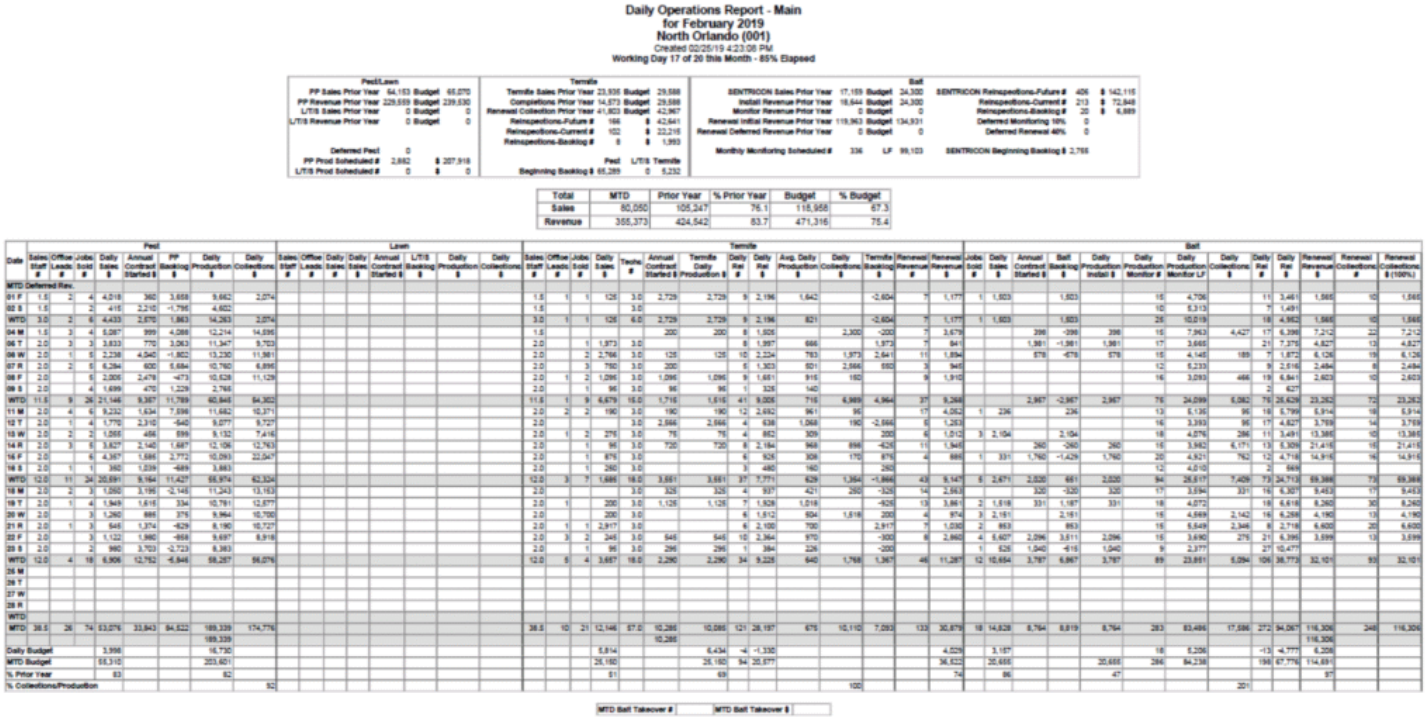
Backlog (services sold and not started / completed)

Collections

The DOR will be completed by Service Center Administrative personnel daily and will summarize the previous day’s sales, production and collection results for each part of our business (Residential and Commercial Pest Prevention, Termite Protection, Bait Protection, and Lawn Services). Besides the numbers you enter daily, the DOR carries month-to-date totals. The DOR form above is used to record this information.

The DOR must be completed by 10:00 A.M EST every Monday through Friday. The following procedures provide step-by-step instructions for its completion (except for the headers, each item number corresponds to a column number on the form).

Residential DOR



Daily Operations Report - Main
for February 2019
North Orlando (001)
Created 02/25/19 4:23:08 PM
Working Day 17 of 20 this Month - 85% Elapsed

Pest/Lawn			Termite			Bait		
PP Sales Prior Year	64,153	Budget 65,070	Termite Sales Prior Year	23,936	Budget 29,588	SENTRICON Sales Prior Year	17,159	Budget 24,300
PP Revenue Prior Year	229,559	Budget 239,530	Completions Prior Year	14,573	Budget 29,588	Install Revenue Prior Year	18,644	Budget 24,300
L/T/S Sales Prior Year	0	Budget 0	Renewal Collection Prior Year	41,803	Budget 42,967	Monitor Revenue Prior Year	0	Budget 0
L/T/S Revenue Prior Year	0	Budget 0	Reinspections-Future #	166	$ 42,641	Renewal Initial Revenue Prior Year	119,963	Budget 134,931
			Reinspections-Current #	102	$ 22,215	Renewal Deferred Revenue Prior Year	0	Budget 0
Deferred Pest	0		Reinspections-Backlog #	8	$ 1,993			
PP Prod Scheduled #	2,882	$ 207,918		Pest	L/T/S Termite	Monthly Monitoring Scheduled #	336	LF 99,103
L/T/S Prod Scheduled #	0	$ 0	Beginning Backlog #	65,289	0 5,232			

SENTRICON Reinspections-Future #	406	$ 142,115
Reinspections-Current #	213	$ 72,848
Reinspections-Backlog #	20	$ 6,889
Deferred Monitoring 10%	0	
Deferred Renewal 40%	0	
SENTRICON Beginning Backlog $	2,755	

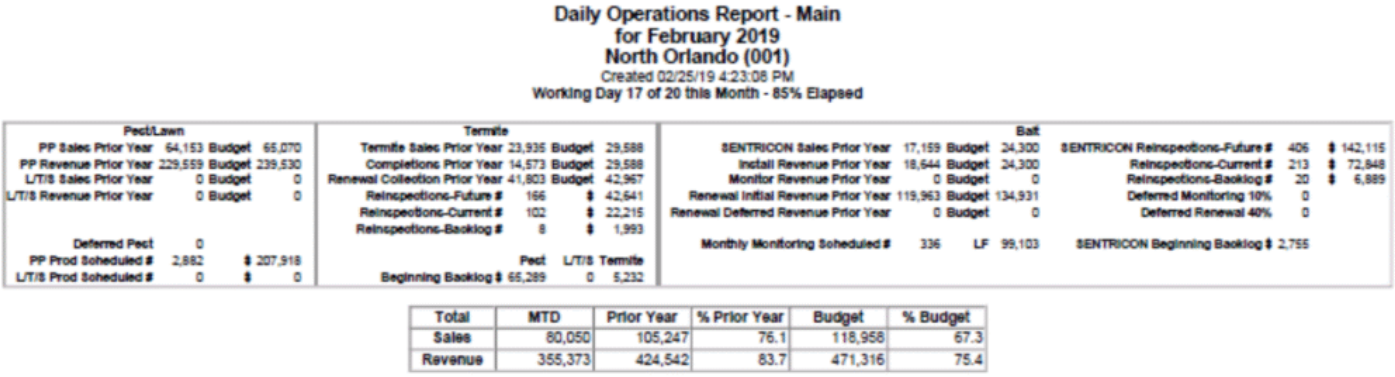
Total	MTD	Prior Year	% Prior Year	Budget	% Budget
Sales	60,050	105,247	76.1	118,958	67.3
Revenue	355,373	424,542	83.7	471,316	75.4

Date	Pest								Lawn								Termite										Bait							
	Sales Staff #	Office Leads #	Jobs Sold #	Daily Sales $	Annual Contract Started $	PP Backlog $	Daily Production $	Daily Collections $	Sales Staff #	Office Leads #	Daily Sales #	Daily Sales $	Annual Contract Started $	L/T/S Backlog $	Daily Production $	Daily Collections $	Sales Staff #	Office Leads #	Jobs Sold #	Daily Sales #	Techs #	Annual Contract Started $	Termite Daily Production $	Daily Per #	Daily Per $	Avg. Daily Production $	Daily Collections $	Termite Backlog $	Renewal Revenue #	Renewal Revenue $	Jobs Sold #	Daily Sales $	Annual Contract Started $
MTD Deferred Rev.																																
01 F	1.5	2	4	4,016	360	3,656	9,662	2,074									1.5	1	1	125	3.0	2,729	2,729	9	2,196	1,642		-2,604	7	1,177	1	1,503	
02 S	1.5		2	415	2,210	-1,795	4,822										1.5				3.0												
WTD	3.0	2	6	4,433	2,570	1,863	14,283	2,074									3.0	1	1	125	6.0	2,729	2,729	9	2,196	821		-2,604	7	1,177	1	1,503	
04 M	1.5	3	4	6,087	999	4,088	12,214	14,595									1.5					200	200	8	1,505		2,300	-200	7	3,679			1,503
05 T	2.0	3	3	3,833	770	3,063	11,347	9,703									2.0		1	1,973	3.0			8	1,397	666		1,973	7	841				1,503
06 W	2.0	1	5	2,238	4,940	-1,802	13,230	11,981									2.0		2	2,796	3.0	125	125	10	2,224	783	1,973	2,641	11	1,894				1,503
07 R	2.0	2	5	6,284	600	5,684	10,760	6,896									2.0		3	750	3.0	200		5	1,303	801	2,866	662	3	945				1,503
08 F	2.0		5	2,906	2,478	473	10,528	11,129									2.0	1	2	1,296	3.0	1,296	1,296	9	1,661	915	182		9	1,910				1,503
09 S	2.0		4	1,699	470	1,229	2,766										2.0		1	96	3.0	96	96	1	328	140							
WTD	11.5	9	26	21,146	9,367	11,789	60,845	64,302									11.5	1	9	6,679	15.0	1,716	1,516	41	9,006	716	6,969	4,964	37	9,268				7,515
11 M	2.0	4	6	9,232	1,634	7,598	11,682	10,371									2.0	2	2	190	3.0	190	190	12	2,692	961	95		17	4,052	1	236		236
12 T	2.0	1	4	1,770	2,310	-540	9,077	9,727									2.0				3.0	2,996	2,996	4	638	1,068	190	-2,996	6	1,263				
13 W	2.0	2	3	1,566	456	599	9,132	7,416									2.0	1	2	276	3.0	76	76	4	662	309		292	6	1,512	3	2,104	
14 R	2.0	3	5	3,827	2,140	1,687	12,106	12,763									2.0		1	96	3.0	720	720	8	2,184	968	696	-428	11	1,946				260
15 F	2.0		6	4,367	1,686	2,772	10,093	22,047									2.0		1	876	3.0			6	926	309	170	876	4	886	1	331	1,760
16 S	2.0	1	1	360	1,039	-689	3,883										2.0		1	260	3.0			3	480	160		260					
WTD	12.0	11	24	20,891	9,164	11,427	66,974	62,324									12.0	3	7	1,686	15.0	3,661	3,661	37	7,771	629	1,364	+1,866	43	9,147	5	2,671	2,020
18 M	2.0	2	3	1,350	3,190	-2,140	11,243	13,163									2.0				3.0	328	328	4	831	421	260	-328	14	2,563				320
19 T	2.0	1	4	1,949	1,616	334	10,791	12,677									2.0	1		200	3.0	1,128	1,128	7	1,928	1,018		-928	13	3,661	2	1,616	331
20 W	2.0		3	1,260	886	375	9,964	10,700									2.0			200	3.0			6	1,612	694	1,618	200	4	974	3	2,191	
21 R	2.0	1	3	646	1,374	-629	8,190	10,727									2.0	1	1	2,917	3.0			6	2,100	700		2,917	7	1,030	2	853	
22 F	2.0		3	1,122	1,980	-858	9,697	8,918									2.0	3	2	246	3.0	646	646	10	2,364	970		-300	8	2,860	4	5,607	2,096
23 S	2.0		2	960	3,703	-2,723	8,363										2.0		1	96	3.0	296	296	1	384	226		-200			1	626	1,040
WTD	12.0	4	18	6,306	12,752	-6,846	58,287	56,076									12.0	5	4	3,687	18.0	2,290	2,290	34	9,228	640	1,768	1,367	46	11,287	12	10,664	3,767
25 M																																
26 T																																
27 W																																
28 R																																
WTD																																
MTD	38.5	26	74	53,076	33,843	84,622	189,339	174,776									38.5	10	21	12,146	57.0	10,286	10,086	121	28,197	675	10,110	7,093	133	30,879	18	14,828	8,764
							189,339															10,286											
Daily Budget				3,356			16,730													5,814			6,434	-4	-1,330					4,529	3,157
MTD Budget				58,310			203,601													25,160			25,160	94	20,577					36,822	20,666
% Prior Year				83			82													81			69							74	86
% Collections/Production								92																			102						

Date	Bait									
	Daily Sales $	Annual Contract Started $	Bait Backlog $	Daily Production Install $	Daily Production Monitor #	Daily Production Monitor LF	Daily Collections $	Daily Per #	Daily Per $	Renewal Revenue #	Renewal Revenue $	Renewal Collections $	Renewal Collections $ (100%)
01 F	1,503		1,503		15	4,706		11	3,461	1,565	10	1,565	
02 S					10	6,313		7	1,491				
WTD	1,503		1,503		25	10,019		18	4,952	1,565	10	1,565	
04 M		399	-399	399	15	7,943	4,427	17	6,396	7,212	22	7,212	
05 T		1,961	-1,961	1,961	17	3,665		21	7,376	4,827	13	4,827	
06 W		678	-678	678	15	4,145	189	7	1,872	6,126	19	6,126	
07 R					12	6,233		9	2,516	2,484	9	2,484	
08 F					16	3,093	466	19	6,841	2,603	10	2,603	
09 S								2	627				
WTD		2,967	-2,967	2,967	75	24,099	6,082	79	26,629	23,262	72	23,262	
11 M			236		13	5,135	95	18	5,799	5,914	19	5,914	
12 T					16	3,393	95	17	4,827	3,759	14	3,759	
13 W	2,104		2,104		18	4,276	286	11	3,491	13,385	10	13,385	
14 R		260	-260	260	15	3,982	6,171	13	6,309	21,416	15	21,416	
15 F	331	1,760	-1,429	1,760	20	4,921	762	12	4,718	14,916	16	14,916	
16 S					12	4,010		2	669				
WTD	2,671	2,020	651	2,020	94	26,617	7,409	73	24,713	69,386	73	69,386	
18 M		320	-320	320	17	3,594	331	16	6,307	9,453	17	9,453	
19 T	1,616	331	1,187	331	18	4,872		18	6,618	8,260	20	8,260	
20 W	2,191		2,191		16	4,569	2,142	16	6,268	4,190	13	4,190	
21 R	853		853		15	5,549	2,346	8	2,718	6,600	20	6,600	
22 F	5,607	2,096	3,511	2,096	15	3,690	275	21	6,395	3,699	13	3,699	
23 S	626	1,040	-414	1,040	9	2,377		27	10,477				
WTD	10,664	3,767	6,897	3,767	89	23,851	5,094	106	36,773	32,101	93	32,101	
25 M													
26 T													
27 W													
28 R													
WTD													
MTD	14,828	8,764	8,819	8,764	283	83,486	17,586	272	94,067	116,306	248	116,306	
										116,306			
Daily Budget	3,157				16	5,206		-13	-4,777	6,206			
MTD Budget	20,666			20,666	286	84,238		196	67,776	114,691			
% Prior Year	86			47						97			
% Collections/Production							201						

MTD Bait Takeover #
MTD Bait Takeover $

DOR Headers



Daily Operations Report - Main
for February 2019
North Orlando (001)
Created 02/25/19 4:23:08 PM
Working Day 17 of 20 this Month - 85% Elapsed

Pest/Lawn			Termite			Bait					
PP Sales Prior Year	64,153	Budget 65,070	Termite Sales Prior Year	23,936	Budget 29,588	SENTRICON Sales Prior Year	17,159	Budget 24,300	SENTRICON Reinspections-Future #	406	$ 142,115
PP Revenue Prior Year	229,559	Budget 239,530	Completions Prior Year	14,573	Budget 29,588	Install Revenue Prior Year	18,644	Budget 24,300	Reinspections-Current #	213	$ 72,848
L/T/S Sales Prior Year	0	Budget 0	Renewal Collection Prior Year	41,803	Budget 42,967	Monitor Revenue Prior Year	0	Budget 0	Reinspections-Backlog #	20	$ 6,889
L/T/S Revenue Prior Year	0	Budget 0	Reinspections-Future #	166	$ 42,641	Renewal Initial Revenue Prior Year	119,963	Budget 134,931	Deferred Monitoring 10%	0	
			Reinspections-Current #	102	$ 22,215	Renewal Deferred Revenue Prior Year	0	Budget 0	Deferred Renewal 40%	0	
			Reinspections-Backlog #	8	$ 1,993						
Deferred Pest	0					Monthly Monitoring Scheduled #	336	LF 99,103	SENTRICON Beginning Backlog $	2,755	
PP Prod Scheduled #	2,882	$ 207,918		Pest	L/T/S Termite						
L/T/S Prod Scheduled #	0	$ 0	Beginning Backlog #	65,289	0 5,232						

Total	MTD	Prior Year	% Prior Year	Budget	% Budget
Sales	60,050	105,247	76.1	118,958	67.3
Revenue	355,373	424,542	83.7	471,316	75.4

Headers: These figures are brought forward by the Reporting Department at Corporate as specified below:

1. **Sales:**
    1. Sales Prior Year – Figures are obtained from prior year DOR for the same month.
    2. Budget – Figures are obtained from the current month budget sheets, which were prepared and agreed to by General Manager and Regional Managers during their budget session.

2. **Revenue = Completions = Installs:**
    1. Prior Year – Figures are obtained from prior year DOR for the same month.
    2. Budget – Figures are obtained from the current month budget sheets, which were prepared and agreed to by General Manager and Regional Managers during their budget session.

3. **Production Scheduled:**
    1. Total Pest Production Scheduled – Figures are obtained from the Production To Do.
    2. Monitoring Scheduled – Figures are obtained from the Production To Do.

4. **Beginning Backlogs Figures:**
    1. Reporting will fill in the Backlog numbers for the sales that were not started the previous month.

5. **Service Center Daily Progression:**
    1. This section displays the service center name, month and year, as well as the current day of the DOR.
    2. Working Day # – How many days have elapsed in the month.
    3. Out of Monthly – How many working days were available at the start of the month.
    4. % Elapsed – Working days divided by how many days were available reflects the percentage of month gone.

Pest Section

Date	Pest							
	Sales Staff #	Office Leads #	Jobs Sold #	Daily Sales $	Annual Contract Started $	PP Backlog $	Daily Production $	Daily Collections $
MTD Deferred Rev.								
01 T								
02 W	2.0	3	2	1,036		1,036	10,025	1,698
03 R	2.0	3	6	15,296	2,181	13,115	10,457	9,339
04 F	2.0		8	3,015	2,580	435	10,103	17,566
05 S	2.0	5	1	520	1,090	-570	4,237	
WTD	8.0	11	17	19,867	5,851	14,016	34,822	28,603

Total Sales Staff - Enter the number of sales inspectors working that day. (Divide the total sales staff number between Pest, Lawn and Termite.)

Office Lead - Enter the total number of Pest Office and Web Leads received for the day. (This figure will be obtained from the Call Log Reconciliation Report found in the reports tab of the Lead Log.

Jobs Sold # - Enter the total number of **PPP/CPP** and one-time Special Services sold.

Daily Sales $ - Enter the annual value of all **PPP/CPP** and the total value of all one-time Special Services sold.

Annual Contract Started - Enter the combined **PPP/CPP** and ***Special Services*** annual value of all the **INITIAL** services completed.

Pest Backlog - **This is a protected formula field, and it is calculated automatically**. (This figure is calculated as follows: Daily Sales (Column 4) less the contract Value Started (Column 5) giving the daily backlog (Column 6)). MTD backlog is calculated by taking the beginning backlog (carried forward from previous month, Daily Sales $, minus Contract Value Started.) (This number is balanced against the actual service center Backlog found in the G: directory in the Service Center Excel folder.)

Daily Production $ - Enter the dollar amount of all ***PPP/CPP*** services from all technicians' production totals, from their daily route sheets. The figures will include the initial service charge for new starts and the total charge for one-time special services. (These figures are balanced against the Completed Billing/Production Report found in Service Pro.)

Daily Collections $ - Enter the dollar amount of the service center and corporate PEST deposit, plus/minus any funds transferred to/from other service centers. (This figure is recorded and obtained from the Daily Deposit log, which has been balanced with the Payments in Total by Service.)

Lawn Section

IF YOUR SERVICE CENTER IS AN ALL SERVICES OFFICE, OR A DEDICATED LAWN SERVICE CENTER, REFER TO THE GREEN-UP DOR.

Click here to go to that section

Termite Section

Termite													
Sales Staff #	Office Leads #	Jobs Sold #	Daily Sales $	Techs #	Annual Contract Started $	Termite Daily Production $	Daily Rei #	Daily Rei $	Avg. Daily Production $	Daily Collections $	Termite Backlog $	Renewal Revenue #	Renewal Revenue $
2.5				3.0			9	1,534	511	225			
2.5		1	95	3.0	95	95	10	2,535	877			4	579
2.0			2,087	3.0	2,446	2,446	10	2,061	1,502		-359	7	1,175
2.0	2	2	2,000	3.0	2,000	2,000	2	480	827				

Sales Staff - Enter the number of Sales Inspectors working that day.

- Divide the total sales staff number between Pest and Termite

Office Leads – Enter the total number of Termite Office and Web Leads received for the day. (This figure will be obtained from the Call Log Reconciliation Report found in the reports tab of the Lead Log.

Jobs Sold # - Enter the number of conventional Termite services and one-time Special Services sold that day.

Daily Sales $ - Enter the annual value of all termite treatments sold: total value of all subterranean,fume, termite transfer, WDO, one-time special services sold and the liquid treatment portion of any Total Coverage Baiting sales for that day.

Tech # - Add all hourly-paid termite technician hours from the Termite Technician’s daily reports. Also, count the hours worked by any non-hourly employee performing termite treatments or reinspections. Divide the total by eight to determine the number of technicians.

Annual Contract Started – This is the dollar amount of all termite production completed from the Technician Summary, plus the amount of any liquid treatments on total coverage baiting contracts completed that day. This will balance to the Annual Value Started $ on the backlog and the production portion of the Completed Billing/Prod in Total by Service Group.

Termite Daily Production $ - This is the dollar amount that was billed to the customer. This will match the Annual Contract Started on the backlog except when an upgrade was sold with a Bait Pay Plan. This will balance to the billing portion of the Completed Billing/Prod in Total by Service Group.

Daily Reinspection # - Enter the number of Conventional Reinspections (count each reinspection report).

Daily Reinspection $ - Enter the total dollar value of all the Conventional Reinspections (the value of each reinspection is at the bottom of the inspection report).

Avg Daily Production – This is a protected formula field, and it is calculated automatically. (this figure is calculated as follows: Daily completions plus Daily Reinspection $ divided by Tech #. This figure lets management know if we are producing work according to company standards).

Daily Collections – Enter the dollar amount of the service center and corporate TERMITE deposits plus or minus any funds transferred to or from other service centers. (This figure is recorded and obtained from the Daily Deposit log, which has been balanced with the Payments in Total by Service report.)

Termite Backlog - This is a protected formula field, and it is calculated automatically (this figure is calculated as follows: Daily Termite Sales less the Daily Completions. The MTD figure is obtained by taking the beginning backlog (carried forward from the previous month and entered in the header section at the top of the DOR form) plus MTD daily sales, minus MTD daily completions).

Renewal Collections # - Enter the total number of service center and corporate renewal deposit units, plus/minus any funds transferred to/from other service centers. (This figure is recorded and obtained from the Daily Deposit log, which has been balanced with the Payments in Total by Service.)

Renewal Collections $ - Enter the total dollar amount of the service center and corporate renewal deposit, plus/minus any funds transferred to/from other service centers. (This figure is recorded and obtained from the Daily Deposit log, which has been balanced with the Payments in Total by Service.)

Bait Section

Bait												
Jobs Sold #	Daily Sales $	Annual Contract Started $	Bait Backlog $	Daily Production Install $	Daily Production Monitor #	Daily Production Monitor LF	Daily Collections $	Daily Rei #	Daily Rei $	Renewal Revenue $	Renewal Collections #	Renewal Collections $ (100%)
1	354	850	-496	850	15	5,182		27	17,222	2,958	10	2,958
1	1,100		1,100		16	4,226	1,454	29	8,068	938	3	938
1	500	1,454	-954	1,454	10	2,347	95	15	3,941	3,018	15	3,018
					10	2,403		7	2,147			
3	1,954	2,304	-350	2,304	51	14,158	1,549	78	31,378	6,914	28	6,914

Jobs Sold # - Enter the number of baiting agreements sold that day.

Daily Sales $ - Enter the dollar value of all baiting services sold that day. Do not include the upgrade portion of any total coverage baiting contracts as this application is classified as a conventional termite treatment.

Annual Contract Started - This is the dollar amount of all bait installs that were completed from the Termite Technician's Daily Summary. This will balance to the Annual Value Started $ on the backlog and the production portion of the Completed Billing/Prod in Total by Service Group.

Bait Backlog - **This is a protected formula field, and it is calculated automatically** (this figure is calculated as follows: Daily Bait Sales less the Contract Value Started. The MTD figure is obtained by taking the beginning backlog (Carried forward from previous month and entered in the header section at the top of the DOR form) plus MTD daily sales, minus MTD value started.

Daily Production Install $ - This is the dollar amount that was billed to the customer. This will match the Annual Contract Started except when a bait was sold with a Bait Pay Plan. This will balance to the Billing portion of the Completed Billing/Prod in Total by Service Group.

Daily Production Monitor # - Enter the number of accounts monitored for that day.

Daily Production Monitor LF - Enter the total LF for all the monitors serviced

Daily Collection - Enter the dollar amount of the service center and corporate BAITING deposits plus or minus any funds transferred to or from other service centers. (This figure is recorded and obtained from the Daily Deposit log, which has been balanced with the Payments in Total by Service)

Daily Reinspections # - Enter the number of Bait Reinspections done for that day. (Count each actual inspection report).

Daily Reinspections $ - Enter the dollar amount of Bait Reinspections completed for that day. (The value of each reinspection is at the bottom of the inspection report.)

Renewal Collections # - Enter the total number of the service center and corporate Bait Renewal deposit units, plus or minus any funds transferred to or from other service centers. (This figure is recorded and obtained from the Daily Deposit log, which has been balanced with the Payments in Total by Service)

Renewal Collections $ - Enter the total dollar amount of the service center and corporate Bait Renewal deposits, plus or minus any funds transferred to or from other service centers. (This figure is recorded and obtained from the Daily Deposit log, which has been balanced with the Payments in Total by Service.)

DOR Footers

These totals come from the figures entered on the DOR. It is a quick glimpse of where the service center is month-to-date.

Daily Budget	1,770			11,850	
MTD Budget	13,934			85,822	
% Prior Year	47			24	
% Collections/Production					92

Daily Budget - This breaks down the average sales per day and the average completions per day.

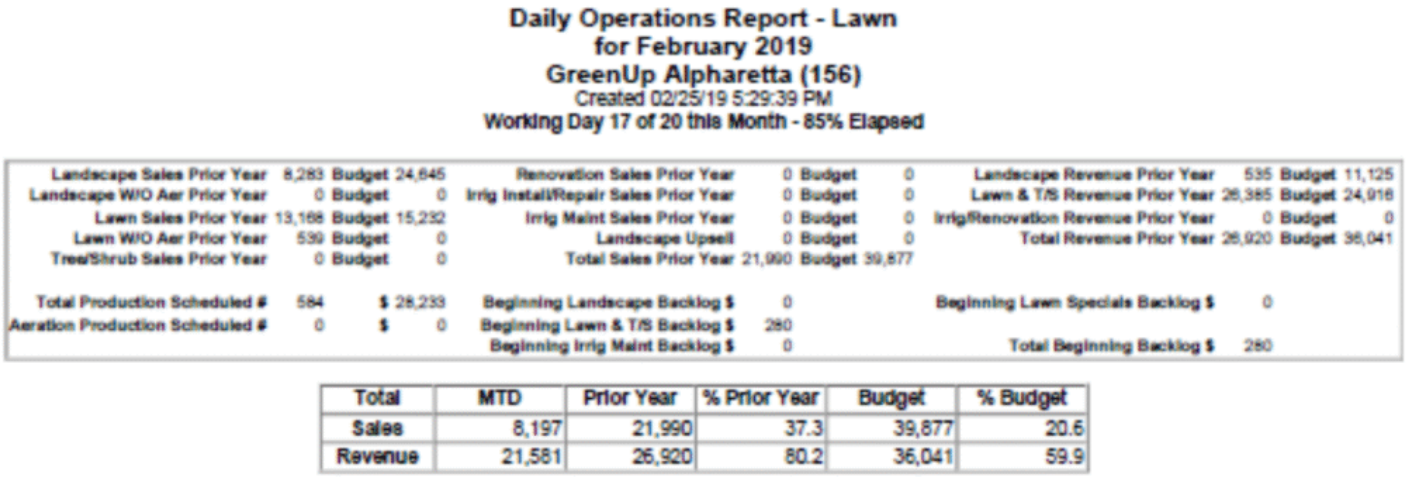
MTD Budget - This breaks down the sales for the month and completions for the month.

% of Prior Year - The Sales or Production/Revenue in comparison to same time last year.

% Collections/Production - Month-to-date collections divided by month-to-date production.

GreenUP DOR

DOR Headers



Daily Operations Report - Lawn
for February 2019
GreenUp Alpharetta (156)
Created 02/25/19 5:29:39 PM
Working Day 17 of 20 this Month - 85% Elapsed

Landscape Sales Prior Year	8,283	Budget	24,845	Renovation Sales Prior Year	0	Budget	0	Landscape Revenue Prior Year	535	Budget	11,125		
Landscape W/O Aer Prior Year	0	Budget	0	Irrig Install/Repair Sales Prior Year	0	Budget	0	Lawn & T/S Revenue Prior Year	26,385	Budget	24,916		
Lawn Sales Prior Year	13,168	Budget	15,232	Irrig Maint Sales Prior Year	0	Budget	0	Irrig/Renovation Revenue Prior Year	0	Budget	0		
Lawn W/O Aer Prior Year	539	Budget	0	Landscape Upsell	0	Budget	0	Total Revenue Prior Year	26,920	Budget	36,041		
Tree/Shrub Sales Prior Year	0	Budget	0	Total Sales Prior Year	21,990	Budget	39,877						
Total Production Scheduled #	584	$	28,233	Beginning Landscape Backlog $	0			Beginning Lawn Specials Backlog $	0				
Aeration Production Scheduled #	0	$	0	Beginning Lawn & T/S Backlog $	280								
				Beginning Irrig Maint Backlog $	0			Total Beginning Backlog $	280				

Total	MTD	Prior Year	% Prior Year	Budget	% Budget
Sales	8,197	21,990	37.3	39,877	20.6
Revenue	21,581	26,920	80.2	36,041	59.9

Headers: These figures are brought forward by the Reporting Department at Corporate as specified below:

1. **Sales**:
    1. Sales Prior Year – Figures are obtained from prior year DOR for the same month.
    2. Budget – Figures are obtained from the current month budget sheets, which were prepared and agreed to by General Manager and Regional Managers during their budget session.
2. **Revenue**:
    1. Prior Year – Figures are obtained from prior year DOR for the same month.
    2. Budget – Figures are obtained from the current month budget sheets, which were prepared and agreed to by General Manager and Regional Managers during their budget session.
3. **Production Scheduled**:
    1. Total Production Scheduled – Figures are obtained from the Production To Do.
    2. Aeration Production Scheduled – Figures are obtained from the Production To Do.
4. **Beginning Backlogs Figures**:
    1. During the first few days of the new month, reporting will fill in the Backlog numbers for the sales that were not started the previous month.

5. **Service Center Daily Progression**:
    1. This section displays the service center name, month and year, as well as the current day of the DOR.
    2. Working Day # – How many days have elapsed in the month.
    3. Out of Monthly – How many working days were available at the start of the month.
    4. % Elapsed – Working days divided by how many days were available reflects the percentage of month gone.

Landscape Section

Date	Landscape							
	Sales with Aeration #	Sales with Aeration Annual $	Sales without Aeration #	Sales without Aeration Annual $	Upsells Annual $	Value Started $	Annual Backlog $	Daily Production $
01 T								
02 W						720	-720	368
03 R	2	1,045					1,045	259
04 F	2	1,440					1,440	300
05 S								391
WTD	4	2,485				720	1,765	1,318

1. **Sales with Aeration #** - Enter the total number of ***Landscape with Aeration*** services sold that day.
2. **Sales with Aeration Annual $** - Enter the annual contract value of all ***Landscape with Aeration*** services sold.
3. **Sales without Aeration #** - Enter the total number of ***Landscape Non-Aeration Annual*** services sold on the day you are working.
4. **Sales without Aeration Annual $** - Enter the annual contract value of all ***Landscape Non-Aeration*** services sold.

5. **Upsells** - Enter the total value of all upsells. (An upsell is where a lawn customer wants to add Tree and Shrub, an annual aeration, or if there was lawn square footage we were not treating, but the customer wants it treated now.)
6. **Value Started $** - Enter the combined **Landscape Aeration and Landscape Non-Aeration** contract/annual value of all the **INITIAL** services completed.
7. **Annual Backlog** - **This is a protected formula field, and it calculates automatically**.
8. **Daily Production** - Enter the dollar amount of all Landscape services from all the technicians' productiontotals, from their daily route sheets. The production figure will also include the INITIAL service charge for new LANDSCAPE starts.

Lawn Section

Lawncare & Tree Shrub								
Sales with Aeration #	Sales with Aeration Annual $	Sales without Aeration #	Sales without Aeration Annual $	Tree Shrub Sales #	Tree Shrub Sales Annual $	Value Started $	Annual Backlog $	Daily Production $
1	350						350	6,162
1	360						360	6,683
						710	-710	6,683
1	769						769	3,531
3	1,479					710	769	23,039

1. **Sales with Aeration #** - Enter the total number of ***Lawncare with Aeration Annual*** services sold that day.
2. **Sales with Aeration Annual $** - Enter the annual contract value of all ***Lawncare Aeration*** services sold.
3. **Sales without Aeration #** - Enter the total number of ***Lawncare Non-Aeration Annual*** services sold.

4. **Sales without Aeration Annual $** - Enter the annual contract value of all ***Lawncare Non-Aeration*** services sold.
5. **Tree Shrub Sales #** - Enter the total number of ***Tree/Shrub Annual*** services sold.
6. **Tree Shrub Sales Annual $** - Enter the annual contract value of all ***Tree/Shrub*** services sold.
7. **Value Started $** - Enter the combined ***Lawn Aeration, Lawn Non-Aeration*** and ***Tree/Shrub*** contract/annual value of all the **INITIAL** services completed.
8. **Annual Backlog** - **This is a protected formula field, and it calculates automatically**.
9. **Daily Production** - Enter the dollar amount of all Lawncare and Tree/Shrub services from all the technicians' production totals from their daily route sheets. The figure will also include the INITIAL service charge for new LAWNCARE and TREE/SHRUB services.

Irrigation/Rennovation

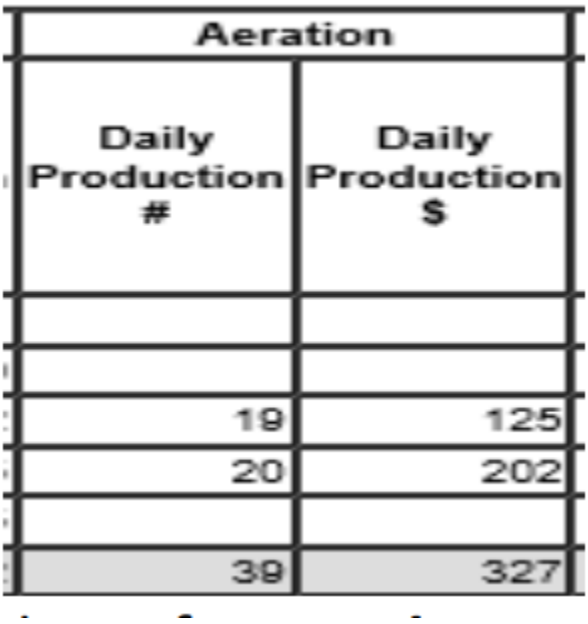
Irrigation & Renovation								
Renov. Sales #	Renov. Sales Annual $	Irrig Install Repair Sales #	Irrig Install Repair Sales Annual $	Irrig Maint Sales #	Irrig Maint Sales Annual $	Value Started $	Annual Backlog $	Daily Production $
		2	1,405	2	620	650	1,375	500
		4	1,125	1	200	1,350	-25	1,902
1	1,680	2	177	1	300	875	1,282	925
						2,205	-2,205	2,715
1	1,680	8	2,707	4	1,120	5,080	427	6,042

1. **Reno Sales #** - Enter the total number of ***Renovation Sales*** sold that day.
2. **Reno Sales Annual $** - Enter the annual contract value of all ***Renovation*** services sold.
3. **Irrigation Install Repair Sales #** - Enter the total number of ***IrrigInstall/Repair*** Sales sold.
4. **Irrigation Install Repair Sales Annual $** - Enter the annual contract value of all ***IrrigInstall/Repair*** services sold.
5. **Irrig Maint Sales #** - Enter the total number of ***Irrigation Maint. Sales*** sold.

6. **Irrig Maint Sales Annual $** - Enter the annual contract value of all ***Irrigation Maint. Sales*** services sold.
7. **Value Started $** - Enter the combined ***Renovation, Irrigation Install/Repair*** and ***Irrigation Maint.*** contract/annual value of all the **INITIAL** services completed.
8. **Annual Backlog** - **This is a protected formula field, and it calculates automatically**.
9. **Daily Production** - Enter the dollar amount of all Renovation, Irrigation Installation/Repair and Irrigation Maintenance services from the technicians' production totals from their daily route sheets. The figure will also include the INITIAL service charge for new RENOVATION, IRRIGATION INSTALLATION/REPAIR AND IRRIGATION MAINTENANCE services.

Annual Aerations

1. **Daily Production #** - Enter the total number of ***Annual Aerations*** done on the day you are working on.
2. **Daily Production $** - Enter the total BILLING value of the ***Annual Aerations*** done on the day you are working on.



Aeration	
Daily Production #	Daily Production $
19	125
20	202
39	327

Lawn Specials

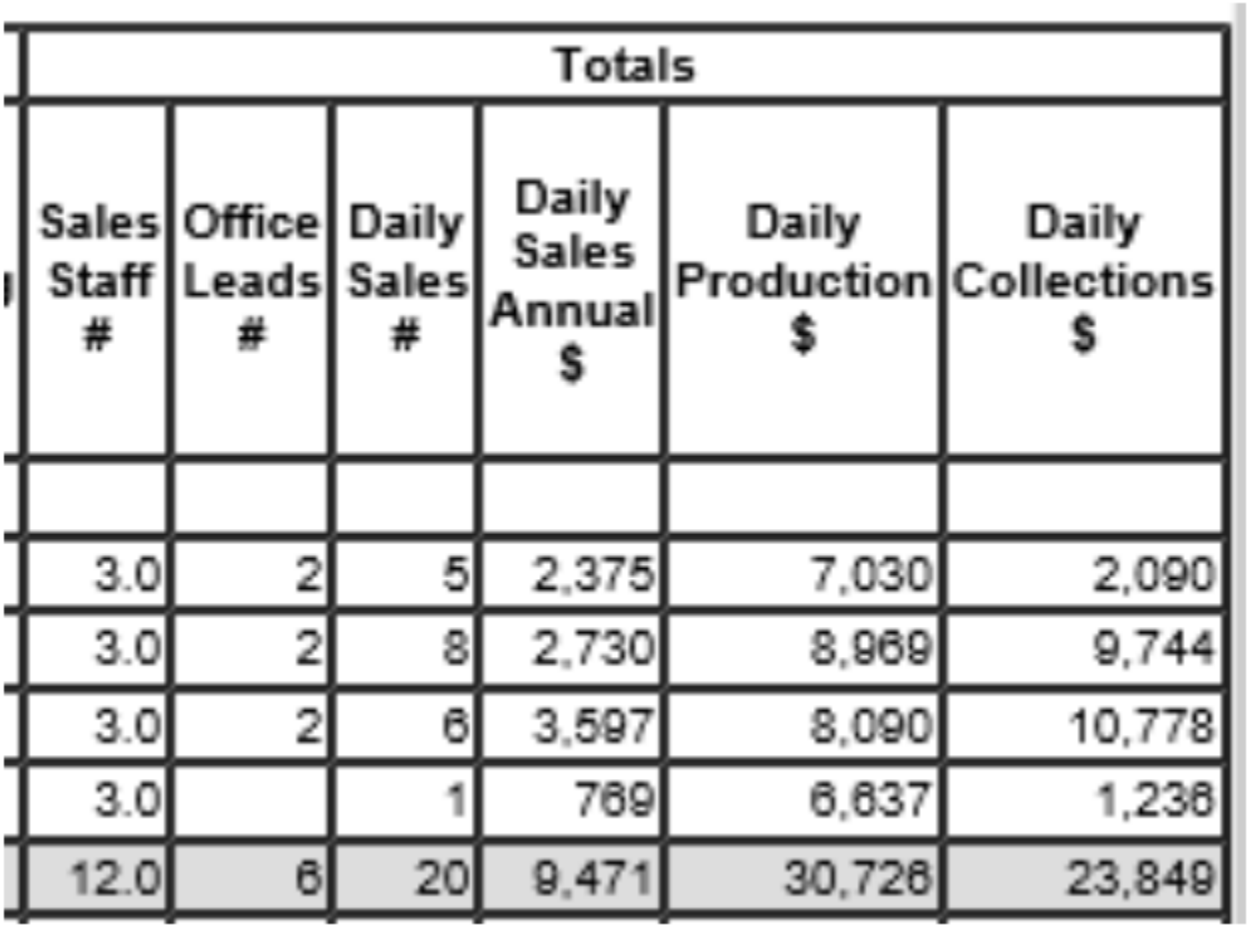
1. **Daily Sales #** - Enter the total number of ***One Time Specials*** sold on the day you are working.
2. **Daily Sales $** - Enter the annual contract value of all ***One Time Specials*** sold.

3. **Value Started** - Enter the contract value of the ***One Time Specials*** started. (This figure will populate into the “Daily Production” number in the daily “TOTALS” column.
4. **Annual Backlog** - **This is a protected formula field, and it calculates automatically**.



Lawn Specials			
Daily Sales #	Daily Sales $	Value Started $	Annual Backlog $

DOR Totals



Totals					
Sales Staff #	Office Leads #	Daily Sales #	Daily Sales Annual $	Daily Production $	Daily Collections $
3.0	2	5	2,375	7,030	2,090
3.0	2	8	2,730	8,969	9,744
3.0	2	6	3,597	8,090	10,778
3.0		1	769	6,637	1,238
12.0	6	20	9,471	30,726	23,849

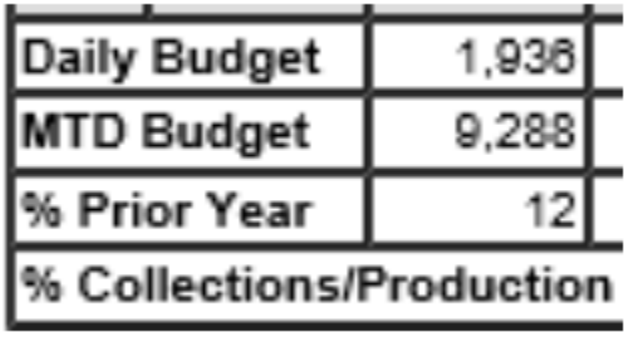
1. **Sales Staff #** - Enter the number of Sales Staff assigned to sell lawn in your service center.
2. **Office Leads #** - Enter the total number of Lawn Office and Leads received for the day. (This figure will be obtained from the *Call Log Reconciliation Report* found in the reports tab of the Lead Log.
3. **Daily Sales #** - **This is a protected formula field, and it calculates automatically**. (This is the total sum of all services sold.)
4. **Daily Sales $** - **This is a protected formula field, and it calculates automatically**. (This is the total dollar value of all services sold.)
5. **Daily Production** - This is a protected formula field, and it calculates automatically. (This is the total value of all services rendered on the service day you are working on.)
6. **Daily Collections** - Enter the dollar amount of the service center and corporate accounts receivable department **LAWN** deposit, plus/minus any funds transferred to/from other service centers. (This figure is recorded and obtained from the Daily Deposit log, which has been balanced

with the Payments in Total by Service report from Service Pro.)

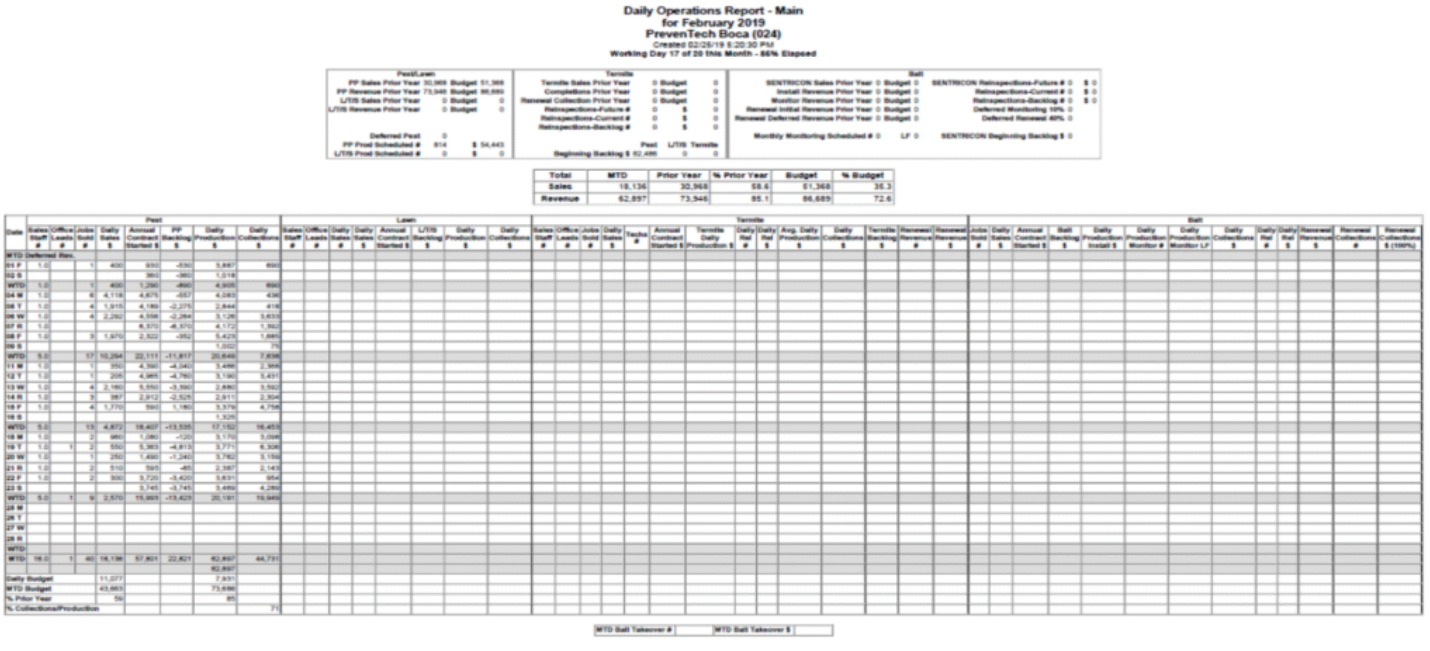
DOR Footers

These totals come from the figures entered on the DOR. It is a quick glimpse of where the service center is month-to-date.

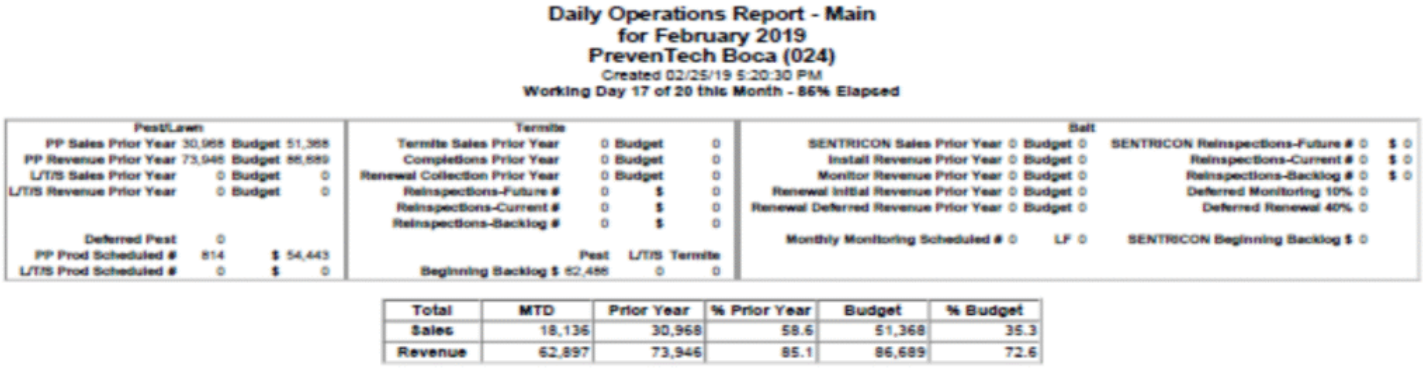
1. **Daily Budget** - This breaks down the average sales per day and the average completions per day.
2. **MTD Budget** - This breaks down the sales for the month and completions for the month.
3. **% of Prior Year** - The Sales or Production/Revenue in comparison to same time last year.
4. **% Collections/Production** - Month-to-date collections divided by month-to-date production.



Commercial DOR



DOR Headers



Daily Operations Report - Main
for February 2019
PrevenTech Boca (024)
Created 02/25/19 5:20:30 PM
Working Day 17 of 20 this Month - 85% Elapsed

Pest/Lawn				Termite				Bait					
PP Sales Prior Year	30,968	Budget	51,368	Termite Sales Prior Year	0	Budget	0	SENTRICON Sales Prior Year	0	Budget	0	SENTRICON Reinspections-Future #	0 $ 0
PP Revenue Prior Year	73,946	Budget	86,689	Completions Prior Year	0	Budget	0	Install Revenue Prior Year	0	Budget	0	Reinspections-Current #	0 $ 0
L/T/S Sales Prior Year	0	Budget	0	Renewal Collection Prior Year	0	Budget	0	Monitor Revenue Prior Year	0	Budget	0	Reinspections-Backlog #	0 $ 0
L/T/S Revenue Prior Year	0	Budget	0	Reinspections-Future #	0	$	0	Renewal Initial Revenue Prior Year	0	Budget	0	Deferred Monitoring 10%	0
				Reinspections-Current #	0	$	0	Renewal Deferred Revenue Prior Year	0	Budget	0	Deferred Renewal 40%	0
				Reinspections-Backlog #	0	$	0						
Deferred Pest	0							Monthly Monitoring Scheduled #	0	LF	0	SENTRICON Beginning Backlog $	0
PP Prod Scheduled #	814	$	54,443		Pest	L/T/S	Termite						
L/T/S Prod Scheduled #	0	$	0	Beginning Backlog $	62,486	0	0						

Total	MTD	Prior Year	% Prior Year	Budget	% Budget
Sales	18,136	30,968	58.6	51,368	35.3
Revenue	62,897	73,946	85.1	86,689	72.6

Headers: These figures are brought forward by the Reporting Department at Corporate as specified below:

1. **Sales**:
    1. Sales Prior Year – Figures are obtained from prior year DOR for the same month.
    2. Budget – Figures are obtained from the current month budget sheets, which were prepared and agreed to by General Manager and Regional Managers during their budget session.
2. **Revenue = Completions = Installs**:
    1. Prior Year – Figures are obtained from prior year DOR for the same month.
    2. Budget – Figures are obtained from the current month budget sheets, which were prepared and agreed to by General Manager and Regional Managers during their budget session.
3. **Production Scheduled**:
    1. Total Pest Production Scheduled – Figures are obtained from the Production To Do.
    2. Monitoring Scheduled – Figures are obtained from the Production To Do.
4. **Beginning Backlogs Figures**:
    1. Reporting will fill in the Backlog numbers for the sales that were not started the previous month.
5. **Service Center Daily Progression**:
    1. This section displays the service center name, month and year, as well as the current day of the DOR.
    2. Working Day # – How many days have elapsed in the month.

3. Out of Monthly – How many working days were available at the start of the month.
4. % Elapsed – Working days divided by how many days were available reflects the percentage of month gone.

Pest Section

Date	Pest							
	Sales Staff #	Office Leads #	Jobs Sold #	Daily Sales $	Annual Contract Started $	PP Backlog $	Daily Production $	Daily Collections $
MTD Deferred Rev.								
01 T								
02 W	2.0	3	2	1,036		1,036	10,025	1,698
03 R	2.0	3	6	15,296	2,181	13,115	10,457	9,339
04 F	2.0		8	3,015	2,580	435	10,103	17,566
05 S	2.0	5	1	520	1,090	-570	4,237	
WTD	8.0	11	17	19,867	5,851	14,016	34,822	28,603

Total Sales Staff - Enter the number of sales inspectors working that day. (Divide the total sales staff number between Pest, Lawn and Termite.)

Office Lead - Enter the total number of Pest Office and Web Leads received for the day. (This figure will be obtained from the *Call Log Reconciliation Report* found in the reports tab of the Lead Log.

Jobs Sold # - Enter the total number of ***PPP/CPP*** and one-time ***Special Services*** sold.

Daily Sales $ - Enter the annual value of all ***PPP/CPP*** and the total value of all one-time Special Services sold.

Annual Contract Started - Enter the combined ***PPP/CPP*** and ***Special Services*** annual value of all the **INITIAL** services completed.

Pest Backlog - **This is a protected formula field, and it is calculated automatically**. (This figure is calculated as follows: Daily Sales (Column 4) less the contract Value Started (Column 5) giving the daily backlog (Column 6)). MTD backlog is calculated by taking the beginning backlog

(carried forward from previous month, Daily Sales $, minus Contract Value Started.) (This number is balanced against the actual service center Backlog found in the G: directory in the Service Center Excel folder.)

Daily Production $ - Enter the dollar amount of all ***PPP/CPP*** services from all technicians' production totals, from their daily route sheets. The figures will include the initial service charge for new starts and the total charge for one-time special services. (These figures are balanced against the Completed Billing/Production Report found in Service Pro.)

Daily Collections $ - Enter the dollar amount of the service center and corporate PEST deposit, plus/minus any funds transferred to/from other service centers. (This figure is recorded and obtained from the Daily Deposit log, which has been balanced with the Payments in Total by Service.)

DOR Footers

These totals come from the figures entered on the DOR. It is a quick glimpse of where the service center is month-to-date.

Daily Budget - This breaks down the average sales per day and the average completions per day.

MTD Budget - This breaks down the sales for the month and completions for the month.

Daily Budget	1,770			11,650	
MTD Budget	13,934			65,822	
% Prior Year	47			24	
% Collections/Production					92

% of Prior Year - The Sales or Production/Revenue in comparison to same time last year.

% Collections/Production - Month-to-date collections divided by month-to-date production.

Pretreat Dor, Pretreat Backlog and Pretreat Balancing

The Pretreat Daily Operations Report (Pretreat D.O.R.) reflects all Pretreat business generated solely by the New Construction Division. It will show, by category, what type of pretreat has been sold, completed, and collected for the month.

As with the regular DOR, the Pretreat DOR must be completed each morning by no later than 10:00 a.m. EST for a companywide DOR to be generated and distributed to our management team. Based on the pretreats set up and scheduled by New Construction, each morning you will record pretreats as follows:

New Construction will email the service center that there is pretreat set up and scheduled in Service Pro. These are main types of pretreats:

- Boracare
- Bait
- Borcare/Bait
- Block/Boracare
- Liquid / Exterior

Only after the pretreat(s) has been performed will the pretreat be added to the Pretreat DOR and Pretreat Backlog.

Pretreat Sale Section

1. Boracare & Baiting - Jobs Sold #: Enter the number of Boracare/Bait pretreats where the Boracare portion was completed that day.
2. Boracare & Baiting - Daily Sales $: Enter the total dollar value of all Boracare/Bait pretreats where the Boracare portion was completed that day.
3. Boracare Only - Jobs Sold #: Enter the number of Boracare only pretreats that were completed that day.
4. Boracare Only - Daily Sales $: Enter the total dollar value of all Boracare only pretreats that were completed that day.
5. Baiting Only - Jobs Sold #: Enter the number of Bait Install only pretreats that were completed that day.
6. Baiting Only - Daily Sales $: Enter the total dollar value of all Bait Install only pretreats that were completed that day.
7. Conv - Jobs Sold #: Enter the number of Conventional pretreats that were completed that day.
8. Conv - Daily Sales $: Enter the total dollar value of all Conventional pretreats that were completed that day.

9. One Time/Exterior Conv - Jobs Sold #: Enter the number of One Time pretreats and chargeable Exterior treatments that were completed that day.
10. One Time/Exterior Conv - Daily Sales $: Enter the dollar value of all One Time pretreats and chargeable Exterior treatments that were completed that day.
11. Pest Plus - Jobs Sold #: Enter the number of Pest Plus services that were completed.
12. Pest Plus - Daily Sales $: Enter the total dollar value of all Pest Plus.

Once the new pretreats have been entered on the DOR, they must be added to the Pretreat Backlog and then balance the DOR and Backlog to each other.

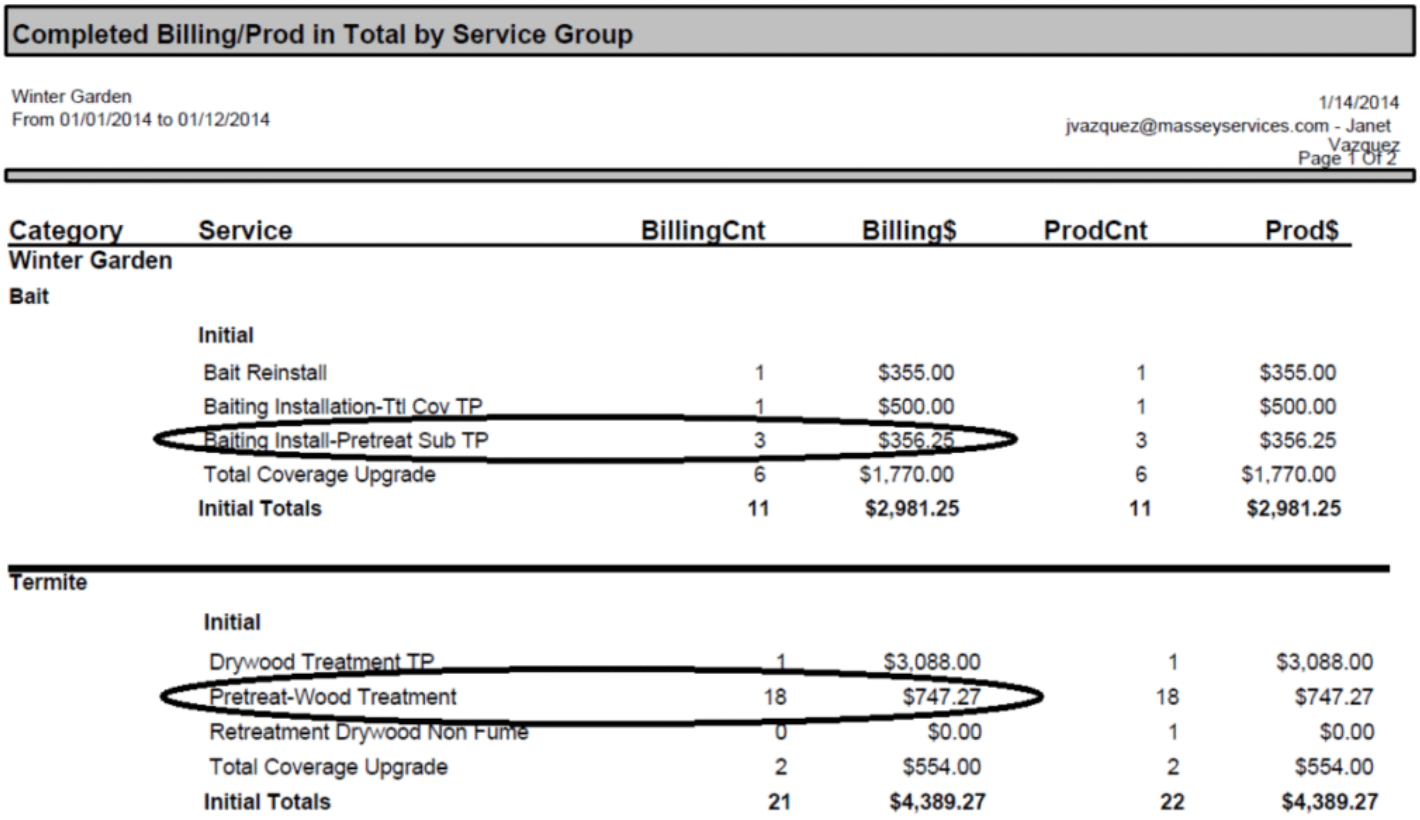


Pretreat Completions (Production)

- Bora/Bait - Baiting Started $: Enter the total dollar value of all Baiting installs of a Boracare/Bait pretreat that was completed that day. (The DOR automatically counts all other pretreats as completions once the sale is entered on the Pretreat DOR.)
- Techs # - Add all hourly-paid Pretreat Technicians' hours for Pretreat work completed. Divide the total hours by eight (8) to determine the number of technicians for that day.
- Reinspections - Conv Completions #: Enter the number of Conventional Annual Inspections completed that day. This is used by the New Construction Service Center only.
- Reinspections - Conv Completions $: Enter the production dollar value for all Conventional Annual Inspections completed that day. This is used by the New Construction Service Center only.
- Reinspections - Bait Completions #: Enter the number of Baiting Annual Inspections completed that day. This is used by the New Construction Service Center only.
- Reinspections - Bait Completions $: Enter the production dollar value for all Baiting Annual Inspections completed that day. This is used by the New Construction Service Center only.

Pretreat					
		Reinspections			
Bora/Bait - Baiting Started	Techs	Conv Completions #	Conv Completions $	Bait Completions #	Bait Completions $
$0.00	0	0	$0.00	0	$0.00
$93.75	0	0	$0.00	0	$0.00
$131.25	1	0	$0.00	0	$0.00
$0.00	0	0	$0.00	0	$0.00
$225.00	1	0	$0.00	0	$0.00
$0.00	0	0	$0.00	0	$0.00
$0.00	1	0	$0.00	0	$0.00
$0.00	0	0	$0.00	0	$0.00
$131.25	1	0	$0.00	0	$0.00
$0.00	1	0	$0.00	0	$0.00
$0.00	0	0	$0.00	0	$0.00
$131.25	3	0	$0.00	0	$0.00
$0.00	0	0	$0.00	0	$0.00
$0.00	0	0	$0.00	0	$0.00
$0.00	0	0	$0.00	0	$0.00
$0.00	0	0	$0.00	0	$0.00
$0.00	0	0	$0.00	0	$0.00
$0.00	0	0	$0.00	0	$0.00
$0.00	0	0	$0.00	0	$0.00

To make certain the DOR and Backlogs are in balance, you will need to run the Completed Billing/Prod in Total by Service Group.



Completed Billing/Prod in Total by Service Group

Winter Garden
From 01/01/2014 to 01/12/2014

1/14/2014
jvazquez@masseyservices.com - Janet Vazquez
Page 1 Of 2

Category	Service	BillingCnt	Billing$	ProdCnt	Prod$
Winter Garden					
Bait					
	Initial				
	Bait Reinstall	1	$355.00	1	$355.00
	Baiting Installation-Ttl Cov TP	1	$500.00	1	$500.00
	Baiting Install-Pretreat Sub TP	3	$356.25	3	$356.25
	Total Coverage Upgrade	6	$1,770.00	6	$1,770.00
	Initial Totals	**11**	**$2,981.25**	**11**	**$2,981.25**
Termite					
	Initial				
	Drywood Treatment TP	1	$3,088.00	1	$3,088.00
	Pretreat-Wood Treatment	18	$747.27	18	$747.27
	Retreatment Drywood Non Fume	0	$0.00	1	$0.00
	Total Coverage Upgrade	2	$554.00	2	$554.00
	Initial Totals	**21**	**$4,389.27**	**22**	**$4,389.27**

Pretreat Collections

See main DOR section for deposit procedure.

Downloads

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1801 Daily Operations ReportDownload