

QuikOne FSM

User Guide – Reports & Analytics

Contents

- 14. Reports & Analytics..... 2
 - 14.1 Summary Report 2
 - 14.2 Scheduler Performance 3
 - 14.3 Contract Utilization 3
 - 14.4 SLA Due 4
 - 14.5 Scheduler Calendar 5
 - 14.6 Customer Quality 6

14. Reports & Analytics

The **Reports & Analytics** module provides operational and performance insights into work orders, schedulers, contracts, SLAs, and customer service quality. These reports help managers monitor field operations, evaluate technician performance, track contract utilization, and make data-driven decisions.

14.1 Summary Report

Summary Report							
Search...							
Work Order ID	Work Order Name	Customer Name	Priority	Status	SLA Status	Technicians	Scheduled Date
WO-2026-2	Maintenance Service	David	High	Created	On Track	Mahesh	-
WO-2026-1	AC Installation	Karthik Raj	High	Created	On Track	Jordan , Robert	-
Items per page: 10 1 - 2 of 2 < >							

Navigation

Work Order → Reports → Summary Report

Overview

The Summary Report provides a consolidated view of all work orders in the system, allowing managers to monitor work order status, assigned technicians, SLA compliance, and scheduling information from a single dashboard.

Report Information

Field	Description
Work Order ID	Unique work order number.
Work Order Name	Name or title of the work order.
Customer Name	Customer associated with the work order.
Priority	Work order priority level.
Status	Current work order status.
SLA Status	SLA compliance status (On Track, Overdue, etc.).
Technicians	Assigned technician(s).
Scheduled Date	Planned execution date.

14.2 Scheduler Performance

Work Order

Work Order / Reports

Customer

Create Customer

Request

Create Request

Quotations

Create Quotations

Work Order

Create Work Order

Scheduler

Create Scheduler

Reports

Reports

Summary Report

Scheduler Performance

Contract Utilization

SLA Due

Scheduler Calendar

Customer Quality

Scheduler Performance Report

Search...

Scheduler Name	Employee ID	Total Assigned	Completed	Pending	Cancelled	Rescheduled	SLA Met (%)	SLA Breached
QuikFSM	-	12	-	-	-	-	-	100

Items per page: 10 1 - 1 of 1

Navigation

Work Order → Reports → Scheduler Performance

Overview

The Scheduler Performance Report measures how effectively schedulers manage work assignments and service delivery.

Report Information

Field	Description
Scheduler Name	Scheduler responsible for assignments.
Employee ID	Scheduler employee identifier.
Total Assigned	Total jobs assigned.
Completed	Successfully completed schedules.
Pending	Open schedules awaiting completion.
Cancelled	Cancelled schedules.
Rescheduled	Number of rescheduled visits.
SLA Met (%)	Percentage of jobs completed within SLA.
SLA Breached	Total SLA violations.

14.3 Contract Utilization

Contract Utilization Report

Search...

Contract ID	Contract Name	Allocated Amount	Used Amount	Remaining Amount	Utilization (%)	Work Order Count
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Navigation

Work Order → Reports → Contract Utilization

Overview

The Contract Utilization Report tracks the consumption of customer contracts, including allocated value, utilized amount, remaining balance, and work order activity.

Report Information

Field	Description
Contract ID	Unique contract identifier.
Contract Name	Name of the contract.
Allocated Amount	Total contract value.
Used Amount	Amount consumed through services.
Remaining Amount	Available contract balance.
Utilization (%)	Percentage of contract utilized.
Work Order Count	Total work orders executed under the contract.
Status	Current contract status.

14.4 SLA Due

Sla Due Report							
Search...							
Work Order ID	Customer Name	Contract Name	Status	Due Date	Scheduled Date	Due Category	Delay (Days)
WO-2026-2	David	-	Created	2026-08-31	-	On Track	-
WO-2026-1	Karthik Raj	-	Created	2026-08-29	-	On Track	-

Navigation

Work Order → Reports → SLA Due

Overview

The SLA Due Report identifies work orders approaching or exceeding their Service Level Agreement (SLA) deadlines.

Report Information

Field	Description
Work Order ID	Work order number.
Customer Name	Customer requesting the service.
Contract Name	Associated customer contract.
Status	Current work order status.
Due Date	SLA due date.
Scheduled Date	Planned execution date.
Due Category	SLA status (On Track, Due Soon, Overdue).
Delay (Days)	Number of days overdue, if applicable.

14.5 Scheduler Calendar

Scheduler Calendar Report							Search...
Scheduler ID	Scheduler Name	Work Order ID	Customer Name	Contract Name	Scheduled Date	Start Time	
SC-2026-12	Maintenance Service	WO-2026-2	David	-	2026-08-16	2026-08-06T20:00:19.590Z	
SC-2026-11	Maintenance Service	WO-2026-2	David	-	2026-08-15	2026-08-06T20:00:19.590Z	
SC-2026-10	Maintenance Service	WO-2026-2	David	-	2026-08-14	2026-08-06T20:00:19.590Z	
SC-2026-9	Maintenance Service	WO-2026-2	David	-	2026-08-13	2026-08-06T20:00:19.590Z	
SC-2026-8	Maintenance Service	WO-2026-2	David	-	2026-08-12	2026-08-06T20:00:19.590Z	
SC-2026-7	Maintenance Service	WO-2026-2	David	-	2026-08-11	2026-08-06T20:00:19.590Z	
SC-2026-6	Maintenance Service	WO-2026-2	David	-	2026-08-10	2026-08-06T20:00:19.590Z	
SC-2026-5	Maintenance Service	WO-2026-2	David	-	2026-08-09	2026-08-06T20:00:19.590Z	
SC-2026-4	Maintenance Service	WO-2026-2	David	-	2026-08-08	2026-08-06T20:00:19.590Z	
SC-2026-3	Maintenance Service	WO-2026-2	David	-	2026-08-07	2026-08-06T20:00:19.590Z	

Navigation

Work Order → Reports → Scheduler Calendar

Overview

The Scheduler Calendar provides a calendar-based view of all scheduled work orders and technician assignments. Users can visualize daily, weekly, and monthly workloads to improve planning and resource allocation.

Features

- View schedules in **Month**, **Week**, or **Day** mode.
- Display upcoming work orders by date.
- Review technician workload distribution.
- Identify scheduling conflicts.
- Navigate between calendar periods.
- Search scheduled work orders.
- Open schedule details directly from the calendar.

14.6 Customer Quality

Customer Quality Report								
Search...								
Customer Name	Phone Number	Total Work Orders	Completed	Pending	Cancelled	Completion Rate (%)	Avg Completion	
ANS Manufacturers	+91-7874541211	-	-	-	-	-	0.00	
Edward	+91-7855425666	-	-	-	-	-	0.00	
Karan	+91-7844211123	-	-	-	-	-	0.00	
Karthik Raj	+91-78545958866	1	-	-	-	0.00	0.00	
Shankar	+91-7542424545	-	-	-	-	-	0.00	
David	+91-4524527877	1	-	-	-	0.00	0.00	
Sudhir	+91-7898977454	-	-	-	-	-	0.00	
Aravid Sharma	+91-7846545445	-	-	-	-	-	0.00	

Navigation

Work Order → Reports → Customer Quality

Overview

The Customer Quality Report measures service performance for each customer by tracking work order completion statistics and service quality metrics.

Report Information

Field	Description
Customer Name	Customer name.
Phone Number	Customer contact number.

Total Work Orders	Total work orders created.
Completed	Successfully completed work orders.
Pending	Open work orders.
Cancelled	Cancelled work orders.
Completion Rate (%)	Percentage of completed work orders.
Avg Completion Time	Average time taken to complete work orders.