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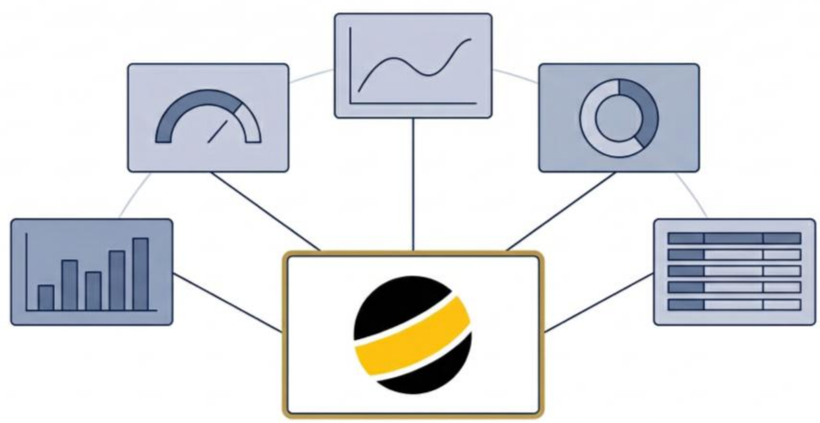

Q360 Dashboards Reference

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Contents

Introduction

Q360 dashboards are real-time, visual summaries of your business data - purpose-built to help you monitor performance, spot trends, and make informed decisions without running separate reports or exporting data to spreadsheets. Each dashboard brings together information from across Q360 (finance, sales, projects, service, and HR) and presents it as a collection of interactive charts, gauges, and tables on a single screen.

This reference document is written for all business users across your organization - executives, directors, department managers, and individual contributors. You do not need a technical background to use this guide. Every dashboard, every chart, and every number is explained in plain business language so that you can understand what you are looking at, where the data comes from, how to interpret it, and what actions you might take based on what you see.

Q360 dashboards are more than convenient reporting tools. They are an integral part of managing your business proactively. Traditional financial statements and end-of-month reports tell you what has already happened. Dashboards shift the conversation forward: they help you anticipate results, validate your strategy, and adjust course before outcomes are locked in. When used as part of a regular operating rhythm - weekly reviews, monthly planning sessions, quarterly course corrections - dashboards transform how leadership engages with the business. Instead of explaining results after the fact, you manage the drivers that produce those results.

This document covers all twenty Q360 dashboards, organized by business function. Each dashboard section follows a consistent structure so you always know where to find what you need: the dashboard's purpose, what data it includes, how to use its filters, a detailed explanation of every widget on the screen, how the widgets interact with each other, how fresh the data is, frequently asked questions, and links to related dashboards.

How to navigate this document:

- If you know which dashboard you need, use the table of contents or search for its name.
- If you are looking for dashboards related to a specific business function (finance, sales, projects, service, or HR), browse by section.
- If you are new to Q360 dashboards, start with the "How to Read a Dashboard" primer below, then explore the Executive Dashboard or One Dashboard for a high-level view of the business.

How to Read a Dashboard

Before diving into specific dashboards, it helps to understand the building blocks that every dashboard shares. This primer explains the common elements you will encounter on any Q360 dashboard screen.

What Is a Widget?

A widget is a single visual element on a dashboard - one chart, one gauge, one table, or one number. Each dashboard is made up of several widgets arranged on the screen, and each widget shows a specific piece of information. Think of widgets as the individual panels on a control panel: each one answers a different question, but together they give you a complete picture.

You will encounter several types of widgets across Q360 dashboards:

- **Gauges** display a single number - for example, your total accounts receivable balance, your current bank balance, or your total employee headcount. Gauges are designed for at-a-glance reading. Some gauges use color coding (green, yellow, or red) to indicate whether the number falls within a healthy range, a cautionary range, or a range that needs attention. The specific thresholds for these colors are configured by your Q360 administrator to match your organization's targets.
- **Charts** display data visually. The most common chart types are bar charts (vertical or horizontal bars comparing values across categories or time periods), pie charts (slices showing how a total breaks down into parts), donut charts (similar to pie charts with a hollow center), and line charts (lines showing trends over time). Charts make it easy to spot patterns, compare values, and identify outliers that deserve a closer look.
- **Grids** (also called tables or lists) display detailed data in rows and columns - similar to a spreadsheet. Grids are useful when you need to see the specifics behind a chart or gauge. For example, a chart might show you that one department has the highest headcount, and a grid beside it might list every employee in that department with their name, role, start date, and status.
- **Summary panels** are condensed grids that show grouped totals - for example, total sales opportunity value grouped by company name. They give you a quick breakdown without showing every individual record.

What Are Filters?

Filters let you narrow down the data shown on a dashboard. For example, you might filter a dashboard to show only one branch, one company (legal entity), or a specific date range. Not every dashboard has user-selectable filters - some show organization-wide data by default. When filters are available, they typically appear in a filters panel on the right side of the screen or at the top of a specific widget.

Common filters you will see across dashboards include Entity (which company or legal entity), Branch (which office location), Department, Date Range or Time Period, and Status.

When you change a filter, it may update one widget or multiple widgets on the same dashboard, depending on how the dashboard is configured. The individual dashboard sections in this document explain exactly which filters are available and what each one controls.

How Drill-Downs Work

Many widgets are clickable. When you click on a bar in a chart, a slice in a pie chart, or a row in a table, Q360 responds in one of two ways:

- **It filters other widgets on the same dashboard.** For example, clicking a department bar in a chart might filter a nearby employee list to show only employees in that department. This is called chart-to-grid synchronization, and it lets you explore the data interactively without leaving the dashboard.
- **It opens a detailed record.** For example, clicking an employee number in a grid might open that employee's full record in Q360, or clicking a project might open the project details screen.

Each widget section in this document tells you exactly what happens when you click.

How Widgets Stay in Sync

On many dashboards, one widget acts as the "driver" that controls what other widgets display. When you change a filter or make a selection on the driver widget, the other widgets on the dashboard automatically update to reflect that selection. This keeps all the information on the screen consistent - you are always looking at the same slice of data across every chart and table.

The individual dashboard sections explain which widget drives the others, and how the synchronization works for that specific dashboard.

Slide Mode and Auto-Rotate

Some dashboards are configured to automatically rotate between widgets in a slideshow format. When slide mode is active, the dashboard cycles through its widgets at a set interval (for example, every three seconds), displaying one widget at a time in a larger view. This is useful for displaying dashboards on a wall-mounted monitor in an office or conference room, where the audience can passively monitor key metrics as they rotate on screen. You can typically stop the rotation by interacting with the dashboard (clicking a widget or changing a filter).

Start Here: Recommendations by Role

The breadth of Q360 dashboards can feel overwhelming if you approach them all at once. Here are suggested entry points and operating rhythms for each major business role:

CEO / President

Your operating rhythm centers on business health, forward-looking performance, and operating decisions.

- **Primary entry points:** Executive Dashboard and One Dashboard. These two work together.
- **Executive Dashboard** provides the current state: current AR, sales pipeline, project backlog, service workload, and headcount. It tells you where the business stands right now.
- **One Dashboard** provides the forward view: projected profitability and cash flow for the next 12 months based on current actuals and future commitments. It tells you where the business is heading.
- **When a number raises a question:** The Executive Dashboard and One Dashboard are your dashboard-level entry points; specific function dashboards are your drill-down points. If the Executive Dashboard's Backlog Gauge is higher than expected, drill to Project Overview. If cash flow projections look weak, drill to Cash Position and Accounts Receivable. If sales pipeline looks flat, drill to Sales Opportunities.
- **Operating rhythm:** Review Executive Dashboard and One Dashboard weekly (say, Monday morning or Friday afternoon) to take the pulse of the business. Use these two together to answer: Are we on track for the quarter? Are there emerging risks in cash flow or profitability? Are there pipeline or backlog issues that need operational attention? During monthly leadership meetings, use One Dashboard to walk the leadership team through forward-looking scenarios and discuss which levers (sales, project delivery, cost control) need adjustment. During quarterly strategic reviews, use One Dashboard's projections as the financial foundation for your strategic discussion-if the projection shows margin compression, that becomes a strategic problem to solve.

CFO / Controller

Your operating rhythm centers on forward-looking financial health and liquidity.

- **Primary entry point:** One Dashboard. This is your widest-angle financial view, projecting profitability and cash flow for the next 12 months based on current bookings, project estimates, and expense trends.
- **Secondary drill-down:** Cash Position. Review this each morning as your cash balance check. The gauges show today's available cash and recent movement, helping you spot collection or payment issues early.
- **Third lens:** Accounts Receivable. Use this during weekly finance reviews to check aging patterns and identify slow-paying customers or overlooked invoices. If the One Dashboard's cash projection shows weakness, the Accounts Receivable dashboard often reveals the root cause (collections backlog).
- **Fourth lens:** Revenue Dashboard. Monitor earned revenue trends month-over-month to confirm that revenue is tracking toward plan. Use this during monthly close reviews.
- **Operating rhythm:** Review Cash Position daily for liquidity status. During weekly finance reviews, open One Dashboard first to assess projected profitability and cash flow for the quarter. During monthly S&OP (Sales &

Operations Planning) meetings, use One Dashboard to model "what-if" scenarios-for example, "What if we win the large RFP?" or "What if two key projects slip by a month?"-to assess financial impact before committing to operational changes.

Sales Manager

Your operating rhythm centers on pipeline health, conversion rates, and rep performance.

- **Primary entry point:** Sales Dashboard. This shows individual rep performance against quota and identifies who needs coaching.
- **Secondary:** Sales Opportunities. This gives you the organization-wide pipeline view-total pipeline value, close probability distribution, and new opportunity generation trends.
- **Third:** Sales Booking. This shows conversion-what has actually been won out of the pipeline. Compare this to Sales Opportunities to calculate your organization's overall win rate.
- **Fourth:** Sales Score Card. Use this monthly to compare reps on standardized metrics (such as average deal size, close rate, or sales cycle length) and identify coaching opportunities.
- **Operating rhythm:** During weekly pipeline reviews, scan the Sales Opportunities KPIs for red indicators (below-plan pipeline generation, slowing close probability, etc.). Check the Closing Group chart to identify deals expected to close in the next 30 days. Review the New Opportunity By Month trend to confirm that pipeline generation is healthy and that you have sufficient opportunities in early stages to support future quota achievement. Use Sales Score Card monthly to compare rep performance and schedule one-on-ones around individuals trending below peers.

VP of Operations

Your operating rhythm centers on portfolio financial health, delivery capacity, and resource allocation.

- **Primary entry point:** Executive Dashboard. This provides the cross-functional health check-project backlog, service workload, invoice status, headcount, and sales pipeline all on one screen.
- **Secondary:** Project Overview. Drill here when the Executive Dashboard's Backlog Gauge raises a question. Use Project Overview's Uninvoiced gauge to catch billing delays and its Backlog Burn Rate chart to ensure that project completion rates match new bookings.
- **Third:** Employee Utilization and Time Bill By Employee Summary dashboards. Use these to verify that your workforce is being efficiently allocated. Compare current-month utilization rates against the prior month to spot trends. If utilization is trending downward, you may have backlog coverage issues; if it is spiking, you may be overloading the team.
- **Fourth:** Pre-Sales Engineering (if your organization has this function). This shows technical resource allocation to sales opportunities, helping you assess whether you are investing pre-sales effort in winnable deals or spreading resources too thinly across low-probability opportunities.
- **Operating rhythm:** Review the Executive Dashboard weekly during operations reviews to take the pulse of the business. Check the Project Overview's Uninvoiced gauge specifically-this is a leading indicator of billing and collection issues. Review Employee Utilization's current-month gauge against the prior month to spot capacity

trends. Monitor the Backlog Burn Rate chart to ensure delivery velocity is sustainable and not outpacing new business wins. Use these metrics to make capacity decisions: if backlog is declining, you may need new sales; if utilization is unsustainably high, you may need to increase staffing or slow sales.

Service Manager

Your operating rhythm centers on workload, response times, and resolution patterns.

- **Primary entry point:** Service Call Open. This is your real-time workload dashboard, showing all open tickets, how long they have been open, and which technicians are assigned.
- **Secondary:** Service Call Closed. Use this to analyze trends: Are response times improving or degrading? Are certain problem codes recurring, suggesting opportunities for proactive fixes? Are specific technicians consistently faster or slower to close tickets?
- **Third:** Call Activity. This shows how customers perceive your service operations. Use this to understand satisfaction trends and whether customer-facing metrics (like "how would you rate our response time?") align with what your internal metrics show.
- **Operating rhythm:** During daily dispatch meetings, use Service Call Open's interactive charts to identify aging tickets that need priority attention and to spot workload imbalances across technicians. Reassign tickets as needed to balance the load. During weekly service reviews, spend 15 minutes on Service Call Closed analyzing response time trends and recurring problem codes. If a particular problem code shows up repeatedly, schedule a team discussion about root cause and whether a proactive fix is worth the investment.

HR Manager

Your operating rhythm centers on workforce composition, organizational structure, and deployment.

- **Primary entry point:** HR Overview. This is your workforce snapshot-total headcount, distribution across locations and departments, age composition, and organizational reporting relationships.
- **Secondary:** Employee Utilization. After verifying headcount and organizational structure on HR Overview, use Employee Utilization to understand whether departments are over- or under-utilized relative to staffing levels.
- **Operating rhythm:** Use HR Overview monthly to verify employee records are current-check that no employees have blank branch or department assignments, that "Reports To" relationships are filled in, and that the age bracket distribution supports succession planning discussions. Review the employee list during organizational reviews to validate the org structure visually. Use Employee Utilization to benchmark department capacity: if your largest department (by headcount) shows the lowest utilization percentage, that may signal a deployment or skill mismatch.

Executive & Company-Wide Dashboards

These dashboards provide senior leadership with a consolidated, cross-functional view of organizational health - spanning finance, sales, projects, service, and HR in a single screen or a small set of screens. They are designed for executives, controllers, CFOs, and anyone who needs to assess the overall state of the business without switching between multiple reports.

The two dashboards in this section serve complementary purposes. The Executive Dashboard is a wide-angle snapshot: it shows current balances, recent trends, and activity levels across every major function. The One Dashboard is a forward-looking financial command center: it projects profitability and cash flow into future periods so leadership can anticipate results and adjust course before outcomes are locked in.

Together, they form the foundation of the executive operating rhythm described in Q360's Business Managed framework. The Executive Dashboard tells you where the business stands right now. The One Dashboard tells you where the business is heading.

Executive Dashboard

Path: Dashboards > Executive > Executive Dashboard

Roles: CEOs, CFOs, Controllers, Vice Presidents, and any senior leader who needs a single-screen summary of company performance across finance, sales, projects, service, purchasing, and HR.

Permission: Users must have access to the Dashboards menu in Q360. If the Executive Dashboard does not appear in your menu, contact your Q360 administrator to request access.

Purpose

The Executive Dashboard is the widest-angle view available in Q360. It brings together key performance indicators from every major business function onto one screen, allowing senior leadership to monitor company health at a glance. It answers questions like:

- How much do our customers owe us right now, and how much do we owe our vendors?
- What is our current bank balance?
- How are revenue and expenses trending compared to last period?
- What does our sales pipeline look like, and how are bookings trending this year?
- How much project backlog do we have, and what is the gross profit embedded in that backlog?
- How many open service calls do we have, and what are their priorities?
- How much are we spending on purchasing, and how is it distributed across branches?
- What is our current employee headcount, and how has it changed over time?

This dashboard is the starting point for the executive operating rhythm. Use it to take the pulse of the business at the beginning of each week, to prepare for leadership meetings, or to quickly identify areas that need deeper investigation. When a number on this dashboard raises a question, you can use the more detailed, function-specific dashboards described elsewhere in this document to find the answer.

In the context of Q360's Business Managed framework, the Executive Dashboard provides the "current state" view. It tells you what the scoreboard shows right now. For the forward-looking view - where the business is heading over the next 30, 60, and 90 days - see the One Dashboard.

Data Included

This dashboard draws from live Q360 data across multiple areas: accounts receivable (customer invoices), accounts payable (vendor invoices), general ledger (revenue and expenses), bank accounts, sales opportunities, sales orders, project WIP BI Data snapshots, service calls, purchase orders, and employee records.

The following are included:

- **Accounts receivable:** All open (unpaid) customer invoices with a remaining balance
- **Accounts payable:** All posted vendor invoices with a remaining balance
- **Bank balances:** All accounts designated with a Bank Flag in your chart of accounts
- **Revenue and expenses:** Summarized from your general ledger for the most recently completed fiscal period
- **Inventory balance:** The current balance of your inventory asset account
- **Sales opportunities:** All active opportunities at or above a minimum probability threshold (default: 20%)
- **Sales order bookings:** Confirmed, approved, and shipped orders for the current calendar year
- **Project backlog:** The latest WIP BI Data snapshot for all open projects, including projected revenue, remaining backlog, and gross profit backlog
- **Project bookings, revenue, and backlog burn rate:** Monthly trend data for the last 12 months (deferred revenue projects only)
- **Service calls:** All currently open (active) service calls
- **Purchase orders:** Confirmed, approved, and received purchase orders for the last 12 months
- **Employee headcount:** Monthly headcount totals for the last 12 months

The following are **not** included:

- Draft or data-entry stage sales orders (only confirmed and beyond)
- Unposted vendor invoices (only posted invoices appear in accounts payable)
- Fully paid invoices (only open balances are shown)
- Closed or canceled service calls
- Non-employee records (contractors, consultants) in the headcount count
- Non-deferred-revenue projects in the bookings/revenue/backlog burn rate chart

Dashboard Filters

The Executive Dashboard does not have a single, prominent filter bar that you interact with directly on the main screen. Instead, each widget has its own set of filters that can be accessed through the dashboard's filter panel (click the filter icon at the top of the screen to reveal it). The filter panel is organized by widget, so you can adjust the view for specific sections of the dashboard.

The most commonly used filters across this dashboard are:

Filter	Behavior	Default
Entity	Narrows to a specific company (legal entity)	All entities
Branch	Narrows to a specific office location	All branches
Time Period (varies by widget)	Controls the date range for trend charts (bookings, invoicing, purchasing, headcount)	Varies - typically calendar year-to-date or last 12 months
Order Status (Sales Bookings)	Controls which order statuses are included in the bookings chart	CONFIRMED, APPROVED, PARTSHIP, SHIPPED, AND SHIPQ
Probability (Sales Opportunities)	Sets the minimum probability for opportunities to appear	20%

Tip: *When you change the Entity or Branch filter on one widget, the dashboard automatically propagates that change to most other widgets on the screen. This keeps your view consistent - if you select a specific branch, the financial gauges, sales charts, project stats, and service call counts all update to reflect that branch.*

Filters Sync

The Accounts Receivable Open Total gauge (the first gauge in the left column) acts as the primary synchronization source for Entity and Branch filters. When you change the Entity or Branch on this widget, the new values automatically flow to the invoicing chart, accounts payable gauge, service call chart, sales opportunity panels, sales bookings chart, project bookings chart, project stats gauges, revenue and expense gauges, bank balance, and purchasing chart.

A small number of widgets also share additional filter settings (such as currency) to ensure that financial figures are displayed consistently across the dashboard.

Note: *If your organization has paid all outstanding invoices and the accounts receivable balance is zero, the synchronization source may not have data to propagate. In this uncommon scenario, other widgets may not automatically update when you change filters. Refreshing the dashboard will resolve this.*

Dashboard Widgets

The Executive Dashboard contains seventeen widgets arranged in a dense, information-rich layout. The left column displays financial gauges stacked vertically. The center area contains trend charts for sales, invoicing, purchasing, and project activity. The right side shows the sales pipeline and service call breakdown. A wide chart spanning the bottom of the screen shows the twelve-month bookings, revenue, and backlog trend.

Widget: Accounts Receivable Open Total

Description: A single dollar figure showing the total amount your customers currently owe you - the sum of all unpaid invoice balances across the organization.

Data Source: This number is calculated from all open customer invoices in Q360. An invoice is considered "open" if it has any remaining unpaid balance. Fully paid invoices and voided invoices are not included.

Interpreting Widget: This is your total outstanding receivables at this moment. A rising number over time may indicate that customers are paying more slowly or that invoicing volume has increased. A falling number may indicate strong collections or a slowdown in invoicing. The gauge uses color coding - green, yellow, or red - to indicate whether the balance falls within a range your organization considers healthy, cautionary, or concerning. These color thresholds are configured by your Q360 administrator.

Widget Filtering: By default, this gauge shows all entities and all branches. You can filter by Entity or Branch using the filter panel. This widget also serves as the primary filter synchronization source - when you change the Entity or Branch here, most other widgets on the dashboard update to match.

Drilldown: No drilldown. Informational only. To investigate your receivables in detail, use the Accounts Receivable dashboard.

Widget: Accounts Payable Open Total

Description: A single dollar figure showing the total amount your organization currently owes to vendors - the sum of all unpaid, posted vendor invoice balances.

Data Source: This number is calculated from all vendor invoices in Q360 that have been posted (finalized) and still have a remaining balance. Vendor invoices that have been fully paid or voided are not included.

Interpreting Widget: This represents your current outstanding payables. Compare it to your Accounts Receivable and Bank Balance gauges to get a quick sense of your cash position. If payables significantly exceed your bank balance, you may need to prioritize collections or plan cash flow carefully. The gauge uses the same color-coding system as other gauges on this dashboard.

Widget Filtering: Shows all entities and all branches by default. Updates automatically when you change the Entity or Branch on the Accounts Receivable gauge.

Drilldown: No drilldown. Informational only. For detailed payables analysis, use the dedicated finance reports available in Q360.

Data Quality Note: Only posted vendor invoices are included. If your organization has significant vendor invoices that have been received but not yet posted (finalized) in Q360, those amounts will not appear in this gauge. The actual amount owed to vendors may be higher than what this gauge shows. Ensure vendor invoices are posted promptly to keep this number accurate.

Widget: Total Projected Revenue

Description: A single dollar figure showing the total projected revenue across all active projects, based on the most recent work-in-progress data available.

Data Source: Q360 periodically takes a snapshot of all active projects and stores it in BI Data, capturing their projected revenue, costs, and margins based on current estimates. This gauge displays the total projected revenue from the latest snapshot. It includes all open projects, regardless of project type, and reflects the most current project budget and forecast data entered by project managers.

Interpreting Widget: This number represents the total revenue your organization expects to earn from its current portfolio of active projects. It is a forward-looking figure based on project estimates, not a measure of revenue already earned. If this number changes significantly between periods, it likely means projects have been added, completed, or had their estimates revised.

Widget Filtering: Shows all entities, all branches, and all project types by default. You can filter by Entity, Branch, or Project Type.

Drilldown: No drilldown. Informational only. For project-level detail, use the Project Overview dashboard.

Widget: Total Project Backlog

Description: A single dollar figure showing the total backlog across all active projects - the contracted revenue that has not yet been earned.

Data Source: Same WIP BI Data snapshot as the Total Projected Revenue gauge. Backlog is calculated as the difference between total projected revenue and revenue already earned on each project, summed across all active projects.

Interpreting Widget: Backlog represents the work your organization has committed to deliver but has not yet completed. It is one of the most important leading indicators of future revenue. A healthy, stable or growing backlog means the organization has a solid pipeline of work ahead. A declining backlog - especially if new bookings are not keeping pace - signals that future revenue may decrease unless new work is secured.

In Q360's Business Managed framework, backlog is described as "the engine" of the business. Sales bookings replenish backlog, and disciplined delivery of backlog produces revenue and profit. Monitoring this number regularly helps leadership ensure the engine has enough fuel.

Widget Filtering: Synchronized with the Total Projected Revenue gauge. Any filter changes to that gauge also apply here.

Drilldown: No drilldown. Informational only.

Widget: Total Project Backlog Gross Profit

Description: A single dollar figure showing the gross profit portion of the total project backlog - how much profit is embedded in the remaining work.

Data Source: Same WIP BI Data snapshot. This figure represents the total projected gross profit on the remaining backlog across all active projects. It is calculated by subtracting projected remaining costs from remaining revenue for each project and summing the result.

Interpreting Widget: While the Total Project Backlog tells you how much revenue remains to be earned, this gauge tells you how much profit is embedded in that revenue. If backlog is high but backlog gross profit is low (or declining), it may indicate that the organization is taking on lower-margin work. This metric is particularly useful during monthly and quarterly reviews to assess whether the forward workload supports the company's profitability targets.

Widget Filtering: Synchronized with the Total Projected Revenue gauge.

Drilldown: No drilldown. Informational only.

Widget: Revenue Period Ending

Description: A single dollar figure showing your organization's total revenue for the most recently completed fiscal period. The gauge title includes the period end date so you always know which period you are looking at.

Data Source: This figure is calculated from your general ledger, specifically from all accounts classified as income (revenue) accounts. It represents the total revenue posted to the general ledger for the displayed period.

Interpreting Widget: This is the actual revenue your organization recorded for the period - not projected, not forecasted, but realized. Compare this number period over period to identify trends. Compare it to your budget to assess whether the organization is on plan. If revenue is declining while backlog is growing, it may signal a delivery bottleneck. If revenue is rising while backlog is shrinking, the organization may be earning well now but could face a shortfall in future periods.

Widget Filtering: Shows all entities by default. The period defaults to the last completed calendar month. If your fiscal calendar does not align with calendar months, confirm with your Q360 administrator which period is being displayed.

Drilldown: No drilldown. Informational only. For detailed revenue analysis, use the Revenue Dashboard.

Data Quality Note: This gauge reads from a summarized version of your general ledger. If recent journal entries have been posted but the summary has not yet been refreshed, the number may not reflect the very latest postings. Verify with your accounting team that the general ledger summary is current, especially near month-end.

Widget: Expense Period Ending

Description: A single dollar figure showing your organization's total expenses for the most recently completed fiscal period.

Data Source: Calculated from your general ledger, specifically from all accounts classified as expense accounts. It represents total expenses posted for the displayed period.

Interpreting Widget: Compare this to revenue for the same period to quickly assess profitability. If expenses exceed revenue, the period resulted in a loss. Track this number period over period to identify cost trends. If expenses are rising faster than revenue, margin compression may be occurring. In your monthly review, compare this figure to the budget to identify whether operating costs are under control.

Widget Filtering: Same as the Revenue Period Ending gauge - all entities by default, defaulting to the last completed calendar month.

Drilldown: No drilldown. Informational only.

Widget: Inventory Balance

Description: A single dollar figure showing the current balance of your organization's inventory asset account - the value of physical inventory on hand.

Data Source: This figure is the real-time balance of the inventory (sales asset) general ledger account for each entity, summed across all entities.

Interpreting Widget: This represents the dollar value of inventory your organization currently holds. A growing inventory balance may indicate stock is building up (possibly due to delayed projects or slow-moving items). A declining balance may indicate healthy inventory turnover or potential stock-out risk. Context from purchasing and project activity helps interpret this number.

Widget Filtering: Shows all entities by default. You can filter by Entity.

Drilldown: No drilldown. Informational only.

Widget: Bank Balance

Description: A single dollar figure showing the total balance across all of your organization's bank accounts.

Data Source: This figure sums the current balances of all general ledger accounts that are designated with a Bank Flag in Q360. Only accounts with a non-zero balance are included.

Interpreting Widget: This is your organization's current cash position. Compare it to your Accounts Payable and upcoming obligations to assess liquidity. In Q360's Business Managed framework, cash is described as "king" - a business can appear profitable on the income statement while still facing liquidity risk if cash flow is not managed proactively. Use this number alongside the Cash Forecast on the One Dashboard to assess both current and future cash position.

Widget Filtering: Shows all entities by default. You can filter by Entity.

Drilldown: No drilldown. Informational only. For detailed cash analysis, use the Cash Position and Cash Forecast dashboards.

Data Quality Note: This balance is calculated in real time based on posted general ledger entries. If bank account transactions have not yet been posted (for example, deposits received but not yet recorded), the gauge will not reflect them. Additionally, if a bank account is not properly flagged in Q360's chart of accounts, it will not appear in this total. If the balance seems incorrect, verify with your Q360 administrator that all bank accounts are properly configured.

Widget: Sales Bookings and Gross Profit By Period

Description: A bar chart showing monthly sales order bookings and gross profit over time. Each month has two bars: one for total booking value (in green) and one for gross profit (in red). The default view shows the current calendar year to date.

Data Source: This chart pulls from all sales orders in Q360 that have reached at least a confirmed status. It includes orders that are CONFIRMED, APPROVED, PARTSHIP, SHIPPED, or SHIPQ status. Orders still in the initial DATAENTRY status and canceled orders are excluded.

Interpreting Widget: The green bars show total booking value - how much new work was sold each month. The red bars show the gross profit on those bookings - how much margin is built into the work. Healthy bookings are important, but only if they carry adequate margin. If green bars are growing but red bars are flat or shrinking, the organization may be booking lower-margin work.

In Q360's Business Managed framework, sales bookings are described as "the fuel" that replenishes backlog. New order quotas must replenish the backlog consumed by revenue recognition, not merely match last year's bookings. Use this chart alongside the Bookings / Revenue / Backlog chart at the bottom of the dashboard to see whether bookings are keeping pace with delivery.

Widget Filtering: Defaults to the current calendar year to date. You can adjust the time period, filter by Entity, Branch, Department, Order Type, Sale Type, Sales Rep, and Order Status. If your fiscal year does not start in January, note that the default calendar year view may not align with your fiscal year reporting.

Drilldown: No drilldown. Informational only. For detailed sales order analysis, use the Sales Booking dashboard.

Widget: Active Sales Opportunities

Description: A summary panel listing companies with active sales opportunities, showing each company name and the total dollar value of its open opportunities. A total row at the bottom shows the aggregate value across all companies.

Data Source: This panel pulls from all sales opportunities in Q360 that are considered active (not won, lost, or closed) and meet a minimum probability threshold. By default, only opportunities with a probability of 20% or higher are included.

Interpreting Widget: This is your current sales pipeline, grouped by customer company. Larger values indicate where the biggest potential deals sit. Use this panel during weekly and monthly reviews to assess pipeline health. Are there enough opportunities to replenish backlog over the coming quarters? Is the pipeline concentrated in a few large customers (which introduces risk) or diversified across many?

Widget Filtering: Shows all entities and all branches by default, with a minimum probability of 20%. You can adjust the probability threshold to see higher-confidence deals (for example, set to 50% or higher for a more conservative pipeline view) or lower it to see early-stage leads.

Drilldown: This panel acts as the driver for the Sales Opportunities By Branch chart below it. When you interact with this panel, the branch chart updates to reflect the same data.

Widget: Sales Opportunities By Branch

Description: A bar chart showing the total value of active sales opportunities broken down by branch. The chart title dynamically displays the probability threshold being applied (for example, "Sales Opps By Branch >= 20%").

Data Source: Same data source as the Active Sales Opportunities panel, grouped by branch instead of by company.

Interpreting Widget: This chart helps you understand where your sales pipeline is concentrated geographically. If one branch has significantly more pipeline than others, it may reflect market conditions, sales team strength, or simply larger market territory. If a branch has little or no pipeline, it may warrant attention from sales leadership.

Widget Filtering: Synchronized with the Active Sales Opportunities panel. Any changes to probability, Entity, or Branch on the panel apply here.

Widget: Open Service Calls By Priority

Description: A pie chart showing the distribution of currently open service calls by priority group. Each slice represents a different priority level, and the size of the slice shows how many calls are in that category relative to the total.

Data Source: This chart counts all active (open) service calls in Q360. A service call is considered "active" if it has not been closed or fully billed. This includes calls in any open status - newly created, dispatched, scheduled, awaiting scheduling, or completed but not yet billed.

Interpreting Widget: If the chart is dominated by high-priority slices, the service team may be under pressure and leadership should assess whether staffing and scheduling are adequate. A balanced distribution is typical. If the chart shows very few calls, the service workload is light. If it shows a large number, investigate whether calls are being resolved and closed in a timely manner.

Widget Filtering: Shows all entities and all branches by default. Updates when Entity or Branch filters change on the Accounts Receivable gauge.

Drilldown: No drilldown. Informational only. For detailed service call analysis, use the Service Call Open or Service Call Closed dashboards.

Widget: Invoicing By Period

Description: A bar chart showing total invoicing amounts by month. Each bar represents a month and shows the total dollar value of invoices issued during that month. The default view shows the last six months.

Data Source: This chart pulls from all customer invoices in Q360 for the configured period. Each bar represents the sum of invoice subtotals for that month.

Interpreting Widget: This chart shows your invoicing cadence and volume. Rising bars indicate increased billing activity; falling bars may signal slower project delivery, fewer completed milestones, or billing process delays. Compare this to your revenue gauge - invoicing and revenue are related but not the same (revenue is recognized when earned, while invoicing is when a bill is sent). If invoicing is low while revenue is high, you may have earned revenue that has not yet been billed, which impacts cash flow.

Widget Filtering: Shows all entities and all branches by default. You can change the number of months displayed (default is six). Updates when Entity or Branch filters change.

Drilldown: No drilldown. Informational only.

Widget: Total Headcount

Description: A bar chart showing your organization's total employee headcount over time. Each bar represents a month and shows the number of active employees as of the end of that period. The default view shows the last twelve months.

Data Source: Employee headcount is calculated at the end of each fiscal period based on employee records in Q360. An employee is counted if they were active (had a start date on or before the period end and were not terminated before the period end). Only records classified as employees are included - contractors, consultants, and other non-employee types are excluded.

Interpreting Widget: This chart reveals workforce growth or contraction over time. Use it alongside the HR Overview dashboard for a detailed breakdown of where employees are (by branch, department, age, and status). In the context of the executive operating rhythm, headcount is a key input to capacity planning: if headcount is flat but project backlog is growing, the organization may face a delivery bottleneck. If headcount is growing but bookings are flat, labor costs may outpace revenue.

Widget Filtering: Shows all entities by default over the last twelve months. You can filter by Entity and adjust the time period.

Drilldown: No drilldown. Informational only. For detailed workforce data, use the HR Overview dashboard.

Data Quality Note: The headcount shown for the current month may lag by one month. The chart displays headcount as of the end of each completed fiscal period. If you are viewing the dashboard mid-month, the most recent bar represents the prior month's period-end headcount, not today's headcount. For a real-time view of current employees, use the HR Overview dashboard.

Widget: Purchasing By Branch

Description: A bar chart showing total purchase order amounts broken down by branch. The chart title dynamically displays the date range being shown (default: last twelve months).

Data Source: This chart sums purchase order subtotals from Q360, grouped by the branch associated with each purchase order. It includes purchase orders in CONFIRMED, APPROVED, and RECEIVED statuses. Purchase orders still in the initial DATAENTRY status are excluded.

Interpreting Widget: This chart reveals how procurement spending is distributed across your organization's locations. Branches with larger bars have higher purchasing volumes, which may reflect larger project activity, more inventory needs, or different procurement patterns. Significant changes from one period to the next may warrant investigation.

Widget Filtering: Shows all entities and all branches by default, for the last twelve months. You can filter by Entity, Branch, PO Type, and PO Status, and adjust the date range.

Drilldown: No drilldown. Informational only. For detailed purchasing analysis, use the Purchasing dashboard.

Widget: Bookings / Revenue / Backlog Burn Rate

Description: A bar chart spanning the bottom of the dashboard, showing three metrics by month over the last twelve months: New Bookings (bright green), Earned Revenue (light blue), and Total Backlog (dark blue). Each month has three bars side by side.

Data Source: This chart draws from Q360's monthly WIP BI Data snapshots for projects that use deferred revenue recognition. Each month, the system captures the total backlog, calculates how much new work was booked (by comparing backlog changes and earned revenue), and records how much revenue was earned.

Interpreting Widget: This is one of the most strategically important charts on the Executive Dashboard. It visualizes the relationship between three interconnected metrics:

- **New Bookings** (green) - new project work secured during the month. This is the fuel that feeds backlog.
- **Earned Revenue** (light blue) - project revenue recognized during the month based on work completed. This is the output of delivering backlog.
- **Total Backlog** (dark blue) - the remaining contracted work at the end of each month. This is the engine.

In a healthy business, bookings should consistently meet or exceed earned revenue, keeping backlog stable or growing. If earned revenue exceeds new bookings for several consecutive months, backlog will decline, signaling that future revenue is at risk. Conversely, if bookings consistently outpace earned revenue, backlog grows - which is good, but may indicate delivery bottlenecks if the gap becomes too large.

This chart directly supports Q360's Business Managed principle: monitor the burn rate at which backlog converts into recognized revenue. By managing delivery efficiency, leadership directly influences margin protection, cash flow timing, and capacity utilization.

Widget Filtering: Shows all entities and all branches by default, for the last twelve rolling months. You can filter by Entity and Branch, and adjust the date range.

Drilldown: No drilldown. Informational only.

Data Quality Note: This chart includes only projects that use deferred revenue recognition. If your organization also has projects using other revenue recognition methods, those projects will not appear in this chart. The backlog, bookings, and earned revenue figures shown here may represent only a portion of your total project portfolio. Consult your Q360 administrator or finance team to understand which projects are included.

Widgets Relationship

The Executive Dashboard is designed as an integrated view where widgets provide context for each other. Here is how to read them as a connected story:

1. **Start with the financial gauges on the left.** The Accounts Receivable, Accounts Payable, Bank Balance, and Inventory Balance gauges give you an instant snapshot of your organization's financial position. Compare AR to AP to understand the net flow of money: if customers owe you more than you owe vendors, you are in a net receivable position. Compare both to your Bank Balance to assess immediate liquidity.
2. **Check revenue and expenses.** The Revenue and Expense period gauges tell you how the most recent completed period performed. Revenue minus expenses gives you a rough sense of profitability for that period.
3. **Assess the project portfolio.** The three project stats gauges (Projected Revenue, Backlog, and Backlog Gross Profit) tell you what your project portfolio looks like today. The Bookings / Revenue / Backlog Burn Rate chart at the bottom tells you how that portfolio has been evolving over the past year.
4. **Evaluate the sales pipeline.** The Active Sales Opportunities panel and Sales Opportunities By Branch chart tell you what is in the pipeline. The Sales Bookings chart tells you what has already been sold. Together, they help you assess whether future bookings will sustain the backlog.
5. **Monitor operational activity.** The Service Calls pie chart, Purchasing By Branch chart, and Total Headcount chart round out the picture with operational indicators. Are service demands increasing? Is procurement activity aligned with project needs? Is the workforce the right size for the current workload?

When you change the Entity or Branch filter, most widgets update together, allowing you to drill into a specific part of the organization while maintaining the full cross-functional view.

Data Freshness

Most gauges and charts on the Executive Dashboard pull data in real time (or near real time) each time the dashboard loads or is refreshed. Financial balances (AR, AP, Bank) reflect posted general ledger entries as of the moment you view the dashboard. Project stats reflect the most recent WIP BI Data snapshot taken by the system (typically updated on a regular schedule - confirm the frequency with your Q360 administrator).

Revenue and expense figures come from a summarized general ledger table that is refreshed on a schedule (hourly, daily, or at another interval depending on your configuration). If you need the very latest revenue or expense figures immediately after posting journal entries, check with your accounting team to confirm whether the summary has been refreshed.

Employee headcount data is current through the end of the last completed fiscal period (typically the prior month-end).

For the most up-to-date view, refresh the dashboard by reloading the page.

Frequently Asked Questions

Q: Why don't I see the Executive Dashboard in my menu?

A: You may not have the necessary permissions to access this dashboard. Contact your Q360 administrator to request access.

Q: Why do some gauges show as red even though the business seems healthy?

A: The color thresholds on gauges (red, yellow, green) are configurable and may still be set to default placeholder values that do not reflect your organization's actual performance ranges. Ask your Q360 administrator to review and customize the threshold values for each gauge to match your business targets.

Q: The Accounts Payable number seems low. Are all vendor invoices included?

A: Only posted (finalized) vendor invoices with remaining balances are included. If your organization has received vendor invoices that have not yet been posted in Q360, those amounts will not appear. To ensure this gauge is accurate, post vendor invoices promptly.

Q: Why does the Bookings / Revenue / Backlog chart not show all of our projects?

A: This chart includes only projects that use deferred revenue recognition. Projects using other revenue recognition methods are not reflected. Contact your finance team to understand which projects use deferred revenue and whether this chart represents a complete or partial view of your project portfolio.

Q: Why does the headcount chart seem to be one month behind?

A: The headcount chart shows employee counts as of the end of each completed fiscal period. The current month will not appear until the period closes. For real-time headcount, use the HR Overview dashboard.

Q: The Sales Opportunities panel shows a large pipeline, but the Sales Bookings chart shows low bookings. Should I be concerned?

A: Not necessarily - it depends on the timing. A large pipeline with low recent bookings may mean deals are expected to close soon. However, if this pattern persists for several months, it may indicate stalled deals or an overly optimistic pipeline. Review opportunity close dates and probabilities, and discuss pipeline health in your regular sales review meetings.

Q: Can I see the Executive Dashboard for just one branch or one entity?

A: Yes. Use the filter panel to select a specific Entity or Branch. Most widgets on the dashboard will update to reflect your selection.

Q: How often should I review this dashboard?

A: The Executive Playbook recommends that senior leadership review this dashboard at least weekly - ideally at the start of the business week - to monitor the pulse of the business. It is also valuable before monthly leadership meetings and quarterly reviews.

Related Dashboards

- **One Dashboard** - Provides the forward-looking complement to this dashboard. While the Executive Dashboard shows where the business stands now, the One Dashboard projects where it is heading in terms of profitability and cash flow. Use both together for a complete picture.
- **Accounts Receivable** - Dive deeper into customer invoices, aging, and collection status when the AR Open Total gauge raises questions.
- **Cash Position** - Explore your organization's cash and bank account details beyond the single Bank Balance gauge shown here.
- **Cash Forecast** - See projected cash inflows and outflows when you need to plan liquidity beyond the current bank balance.
- **Revenue Dashboard** - Analyze revenue in detail when the Revenue Period Ending gauge warrants further investigation.
- **Sales Dashboard** - Explore sales performance metrics in greater depth than the bookings and opportunity summaries shown here.
- **Sales Opportunities** - See detailed opportunity data when the Active Sales Opportunities panel identifies a trend worth investigating.
- **Project Overview** - Investigate project health and status when the project stats gauges or backlog chart raise concerns.
- **Employee Utilization** - Understand how employee time is being spent when the headcount chart prompts questions about capacity and productivity.
- **Service Call Open** - Review open service call details when the priority pie chart shows an unusual distribution.
- **HR Overview** - Get the full workforce breakdown (by branch, department, age, gender, and status) when the headcount chart prompts workforce planning questions.

One Dashboard

Path: Dashboards > EXECUTIVE > One Dashboard

Roles: CFOs, Controllers, CEOs, and business executives who need to assess the organization's forward-looking profitability and liquidity from a single screen.

Permission: Users must have access to the Dashboards menu in Q360. If the One Dashboard does not appear in your menu, contact your Q360 administrator to request access.

Purpose

The One Dashboard is an executive-level financial command center. It combines two powerful forecasting views into a single screen to answer the two most critical financial questions any business leader faces:

1. **"Will we be profitable?"** - The Break Even Forecast projects your revenue, costs, and net profit into the future, showing when (and whether) total revenue will cover total costs.
2. **"Will we have enough cash?"** - The Cash Flow Forecast projects your cash position period by period, showing expected inflows and outflows so you can anticipate liquidity needs.

These are fundamentally different questions that can have different answers. A business can be profitable on paper (revenue exceeds costs) while simultaneously running short on cash (because customers have not paid yet, or large purchases are due). By placing both forecasts on one screen, the One Dashboard lets you see both dimensions at once and plan accordingly.

In Q360's Business Managed framework, the One Dashboard is described as "the unifying view" - a single executive-level display that synthesizes sales forecasts, backlog execution, and financial outcomes into two integrated visual narratives. It does not replace detailed reports; it synthesizes them. By integrating projected revenue from active projects, expected revenue from service contracts, estimated variable revenue, forecasted overhead costs, and (optionally) potential revenue from the sales pipeline, One Dashboard allows leadership to anticipate results, validate strategy, and adjust course before outcomes are locked in.

This dashboard is central to the monthly Sales & Operations Planning (S&OP) process. Leadership uses it to review the projected income statement for the next 30, 60, and 90 days, decide whether the projection is acceptable, and take action to change it if it is not.

Data Included

The One Dashboard draws from several sources of financial and operational data in Q360, combining actuals with projections:

Break Even Forecast includes:

- **Project revenue and cost forecasts** - Projected revenue and costs from all active projects, based on current schedules and cost estimates. Revenue is projected based on when costs are expected to be incurred (percent cost complete method), not when invoices are sent.
- **Service contract revenue** - Projected revenue from active service contracts, based on their billing and coverage schedules. Revenue is recognized monthly over the coverage period.
- **Variable revenue** - Estimated recurring revenue from non-project, non-contract sources (for example, time-and-materials billing or other miscellaneous revenue), projected by averaging the last several months of actual results.
- **Fixed costs (overhead)** - Estimated overhead costs, projected by averaging the last several months of actual overhead from your general ledger and applying an optional adjustment factor.
- **Sales opportunity revenue and costs** (optional) - Potential revenue and costs from open sales opportunities above a configurable probability threshold. This is off by default and must be enabled.
- **Historical actuals** (optional) - Actual general ledger results from prior periods, displayed alongside the forecast for comparison.

Cash Flow Forecast includes:

- **Current bank balances** - Your organization's actual bank account balances as of today, serving as the starting point for the cash projection.
- **Accounts receivable collections** - Expected cash inflows from outstanding customer invoices, projected based on either their due dates or average customer payment history.
- **Project invoice forecasts** - Expected cash inflows from future project invoicing, based on project schedules and invoicing timelines.
- **Service contract invoice forecasts** - Expected cash inflows from future service contract billing.
- **Project cost outflows** - Expected cash outflows for non-labor project costs (materials, subcontractors), based on project schedules.
- **Accounts payable outflows** - Expected cash outflows for outstanding vendor invoices.
- **Overhead outflows** - Estimated ongoing fixed overhead costs (same averaging method as the Break Even forecast).
- **Sales opportunity revenue and costs** (optional) - Same as the Break Even forecast, applied to cash timing.

The following are **not** included:

- Draft or on-hold projects (only active projects appear in forecasts)
- Canceled service contracts or expired agreements
- Direct labor costs in the project cost outflow section (labor is captured within the overhead/fixed cost forecast instead)
- Revenue from the current month if that month's general ledger entries are not yet fully posted (the current month may show partial data)

Dashboard Filters

The One Dashboard provides a rich set of filters that allow you to adjust both forecasts simultaneously. When you change a filter on the Cash Flow Forecast (the lower chart), the same change automatically applies to the Break Even Forecast (the upper chart), keeping both views consistent.

Filter	Behavior	Default
Company	Narrows to a specific company (legal entity). Select "All" to combine all entities.	All
Number of Forecast Periods	How many future periods to project (6, 12, 18, or 24)	12 for Break Even; 6 for Cash Flow
Number of Previous Periods	How many historical periods to display before the forecast (0, 1, 3, or 6)	0 (forecast only)
Fixed Periods to Average	How many recent months of actual overhead costs to use when calculating the projected overhead average	3
Variable Revenue Adjustment %	A multiplier applied to the variable revenue forecast. Set to 100 for no adjustment; lower to reduce the projection; higher to increase it.	100
Fixed Cost Adjustment %	A multiplier applied to the overhead cost forecast. Set to 100 for no adjustment; higher if you expect costs to increase.	100
Time Units	Choose whether to view the forecast by month or by week	Month
Base Currency	For multi-currency organizations, select a target currency for consolidated reporting	All (native currency)
Include Opportunities	Whether to include revenue and costs from open sales opportunities in the forecast	No
Minimum Probability	When opportunities are included, the minimum probability threshold an opportunity must meet to appear in the forecast	Not set
Include Project Invoices (Cash Flow)	Whether to include forecasted project invoicing in cash inflow projections	Yes
Include Project Costs (Cash Flow)	Whether to include forecasted project material and subcontractor costs in cash outflow projections	Yes

Filter	Behavior	Default
Include Service Contract Invoices (Cash Flow)	Whether to include forecasted service contract billing in cash inflow projections	Yes
Age By (Cash Flow)	How to project when accounts receivable will be collected: by invoice due date, or by average customer payment days	Due Date
Periods to Collect (Cash Flow)	Number of periods after which overdue invoices are classified as at risk of non-collection	Not set

Tip: *Start with the defaults and adjust one filter at a time to see its impact. The adjustment percentages (Variable Revenue Adjustment and Fixed Cost Adjustment) are particularly useful for "what-if" scenarios - for example, "What happens to our break-even point if overhead increases by 10%?" (set Fixed Cost Adjustment to 110) or "What if variable revenue drops by 20%?" (set Variable Revenue Adjustment to 80).*

Filters Sync

The Cash Flow Forecast widget (the lower chart) acts as the primary filter source. When you change any filter on the Cash Flow Forecast, the corresponding value is automatically passed to the Break Even Forecast widget (the upper chart). This ensures that both charts always display projections based on the same parameters - same company, same time period, same currency, same opportunity settings.

You do not need to change filters on both charts separately. Adjust the Cash Flow Forecast filters, and the Break Even Forecast follows.

Note: *After changing filters, you may need to refresh the dashboard (reload the page) to ensure both charts fully update. This is especially important if you change the time period or toggle the Include Opportunities setting.*

Dashboard Widgets

The One Dashboard contains two widgets, each occupying roughly half the screen. The upper half displays the Break Even Forecast. The lower half displays the Cash Flow Forecast. When slide mode is active, the dashboard automatically rotates between these two views every three seconds.

Widget: Break Even Forecast

Description: A line chart with three filled lines showing Total Revenue (green), Total Cost (red), and Net Profit (light blue) plotted across future periods (months or weeks). The X-axis shows each period. The Y-axis shows dollar amounts. The chart title dynamically displays the number of periods and time unit (for example, "12 Month Break Even Forecast").

Data Source: The forecast is built from multiple sources combined into a single projection:

- **Project revenue** - comes from the delivery schedules and cost forecasts of all active projects. Revenue is projected based on when costs will be incurred (percent cost complete), not when invoices will be sent.
- **Service contract revenue** - comes from the billing schedules of all active service contracts. Revenue is recognized evenly over each contract's coverage period.
- **Variable revenue** - comes from averaging the last several months (default: three) of non-project, non-contract revenue from your general ledger. This average is projected forward into each future period.
- **Fixed costs** - comes from averaging the last several months of overhead expenses from your general ledger, adjusted by the Fixed Cost Adjustment percentage. This average is projected forward.
- **Variable costs** - comes from the cost side of project delivery forecasts (materials, subcontractors).
- **Opportunity revenue and costs** (if enabled) - comes from open sales opportunities with probability above the minimum threshold, assigned to the period matching each opportunity's expected close date.

Interpreting Widget: The chart tells you whether your organization is projected to be profitable - and when.

- When the **green line (Total Revenue)** is above the **red line (Total Cost)**, the organization is projected to generate more revenue than it spends. The gap between the two lines is your projected profit margin.
- When the **red line** is above the **green line**, costs are projected to exceed revenue - a loss scenario.
- The **light blue line (Net Profit)** shows the difference between revenue and costs. When this line is above zero, the organization is profitable. When it is below zero, costs exceed revenue. The point where the Net Profit line crosses zero is the **break-even point**.
- Look at the direction of the lines, not just their position. Are revenue and costs converging (margin compression) or diverging (margin expansion)? Is the trend improving or deteriorating?

In the S&OP process, leadership reviews this chart to answer: "At our current trajectory, will we hit our annual profit target? If not, what needs to change?" If the projection is below target, leadership can explore levers: accelerate project delivery (to boost revenue), close pipeline deals faster (to add project revenue), manage overhead more tightly (to reduce costs), or adjust the variable revenue and fixed cost factors to test different scenarios.

Widget Filtering: Receives all filter values from the Cash Flow Forecast widget. See the Dashboard Filters section above.

Drilldown: The chart itself is visual and does not drill through to underlying records. The data behind the chart is also available in a grid (table) below the chart when viewed in full report mode outside the dashboard, but on the dashboard, only the chart is displayed.

Data Quality Note: The accuracy of this forecast depends entirely on the quality of the underlying data. Project revenue projections are only as good as the cost forecasts and schedules entered by project managers. Service contract revenue projections require active billing schedules. Variable revenue assumes the recent past will repeat - seasonal variations or one-time events in the averaging window can skew the projection. Fixed cost projections assume overhead will continue at the recent average. If your organization is in a period of significant change (rapid hiring, new office openings, restructuring), the historical average may not reflect the future accurately. Use the adjustment percentage filters to account for known changes.

Widget: Cash Flow Forecast

Description: A line chart with two filled lines showing the projected Bank Balance (green) and Overhead (red) plotted across future periods. The X-axis shows each period. The Y-axis shows dollar amounts. The chart title dynamically displays the number of periods (for example, "12 Month Cash Forecast").

Data Source: The cash flow forecast projects your bank balance forward by starting with your actual current bank balance and then adding or subtracting expected cash movements in each period:

- **Cash inflows** - expected collections from outstanding customer invoices (accounts receivable), forecasted project invoicing, and forecasted service contract billing. If opportunities are enabled, potential opportunity revenue is added based on expected close dates.
- **Cash outflows** - expected vendor payments (accounts payable), forecasted project costs (materials and subcontractors), estimated overhead costs, and (if enabled) opportunity-related costs.
- **Net cash movement (Delta)** - the sum of all inflows minus all outflows for each period. This amount is added to the bank balance, producing the projected bank balance for the next period.

The overhead line shows the recurring fixed cost burden projected into each period, giving you a visual baseline for what the business must cover before any variable costs.

Interpreting Widget: The green Bank Balance line is the most important element. It shows the projected trajectory of your cash position:

- If the **green line trends upward**, more cash is coming in than going out - your liquidity is improving.
- If the **green line trends downward**, cash is being consumed faster than it is arriving - a liquidity risk is developing. If the line approaches zero, the organization may face a cash shortfall that requires action (accelerating collections, delaying payments, securing a line of credit, or accelerating project billing).

- The **red Overhead line** runs below zero and represents your ongoing fixed cost burden. This is the minimum cash the business needs to generate just to stay even before funding any project or purchasing activity.

The bank balance for each future period is calculated by starting from the prior period's balance and adding the net cash movement. This means an error or missing data in any period will carry forward into all subsequent periods. If the projection looks unusual three or more periods out, verify the data quality in the near-term periods first.

For the monthly S&OP process, leadership uses this chart to answer: "Will we have enough cash to fund operations over the next 30, 60, and 90 days?" If the projection shows a shortfall, leadership can intervene: accelerate accounts receivable collections, renegotiate vendor payment terms, adjust the pace of project material purchasing, or plan for temporary borrowing.

Widget Filtering: This widget is the primary filter source. All of its filter settings are passed to the Break Even Forecast widget. See the Dashboard Filters section above.

Drilldown: The chart is visual and does not drill through to underlying records on the dashboard. When viewed in full report mode (outside the dashboard), the underlying data grid offers drill-down links to aged accounts receivable, aged accounts payable, account details, and customer records. These drill-downs are available if you open the Cash Flow Forecast as a standalone report from the Q360 reports menu.

Data Quality Note: The accuracy of the cash flow projection depends on several factors:

- **Accounts receivable timing** - The forecast projects when customers will pay based on invoice due dates or average payment history. If a major customer pays significantly faster or slower than the average, actual cash flow will differ from the projection.
- **Project invoicing schedules** - Cash inflows from project invoicing depend on whether project invoicing schedules are defined and current. Projects without invoicing schedules will not generate forecasted cash inflow.
- **Service contract billing** - Only active contracts with defined billing schedules will produce forecasted cash inflow. Contracts without billing schedules or in expired status are excluded.
- **Overhead projection** - Based on a historical average. If your cost structure is changing (for example, you are adding staff or closing an office), adjust the Fixed Cost Adjustment percentage to reflect the expected change.
- **Multi-currency** - If viewing consolidated data across entities with different currencies, ensure exchange rates in Q360 are current. Stale exchange rates will produce inaccurate converted amounts.

Widgets Relationship

The two widgets on the One Dashboard answer complementary questions and should be read together:

1. **Start with the Break Even Forecast (top).** This tells you whether the business is projected to be profitable. Look at the Net Profit line: is it above zero? Is it trending in the right direction? How does the projected revenue compare to projected costs? This is your forward-looking income statement.
2. **Then check the Cash Flow Forecast (bottom).** Even if the Break Even shows profitability, the Cash Flow shows whether the cash will actually be available when you need it. A business can be profitable but cash-poor if customers pay slowly, project invoicing lags, or large vendor payments are due before cash arrives.
3. **Use filters for "what-if" analysis.** The One Dashboard is particularly powerful for scenario planning. For example:

    - "What if we include our sales pipeline?" - Toggle Include Opportunities to Yes and see how potential deals affect both profitability and cash.
    - "What if overhead increases by 15%?" - Set Fixed Cost Adjustment to 115 and watch both charts update.
    - "What if variable revenue drops by 25%?" - Set Variable Revenue Adjustment to 75.
    - "What does the picture look like for just one entity?" - Select a specific company from the filter.

4. **Compare time horizons.** Start with 6 periods for a near-term view where the projection is most reliable, then extend to 12 or 24 periods to see longer-term trends. Remember that near-term projections (30 days) are built mostly from existing commitments and are relatively precise. Longer-term projections incorporate more estimation and should be read as directional rather than exact.

Data Freshness

Both widgets calculate their projections in real time when the dashboard loads or is refreshed. The projections incorporate:

- The latest posted general ledger data (for historical averages and actuals)
- The latest project schedules and cost forecasts
- The latest service contract billing schedules
- Current accounts receivable and accounts payable balances
- Current bank account balances

However, "real time" means "as of the last posting." If journal entries, time bills, or invoices have not yet been posted for the current period, the projections will not include that unposted activity. For the most accurate forecast, ensure that all current-period transactions are posted before using this dashboard for decision-making - especially before monthly S&OP meetings.

If you are viewing the dashboard mid-month and the current month is not yet closed, the forecast may include partial data for the current period. Historical period averages (used for overhead and variable revenue projections) are most accurate when based on fully closed periods. To avoid partial-month distortion, you can set the Number of Previous Periods to 0 (which excludes historical actuals from the chart) or wait until the current period is closed.

Frequently Asked Questions

Q: What is the difference between the Break Even Forecast and the Cash Flow Forecast?

A: The Break Even Forecast projects profitability - whether revenue will exceed costs. It answers "Will we make money?" The Cash Flow Forecast projects liquidity - whether cash will be available when needed. It answers "Will we have cash in the bank?" A business can be profitable but cash-poor (if customers pay slowly) or cash-rich but unprofitable (if it is spending down reserves). Both views are essential for complete financial planning.

Q: Why does the Break Even Forecast show profit, but the Cash Flow shows a declining bank balance?

A: Revenue is recognized when work is completed (percent cost complete), but cash arrives when customers pay their invoices. If your organization has earned revenue on projects but has not yet billed or collected, the Break Even looks healthy while the Cash Flow shows a shortfall. This is a common scenario in project-based businesses and highlights the importance of timely invoicing and collections.

Q: Should I include sales opportunities in the forecast?

A: It depends on your confidence level and how you plan to use the forecast. For conservative financial planning (especially cash flow), leave opportunities excluded (the default). For strategic planning and capacity discussions, enabling opportunities with a high probability threshold (70% or above) can help leadership anticipate the impact of expected new work. Be cautious about including low-probability opportunities, as they can make the forecast look more optimistic than reality.

Q: The forecast changes every time I look at it. Is that normal?

A: Yes. The forecast recalculates every time the dashboard loads, incorporating the latest data. As projects progress, invoices are paid, new orders are booked, and general ledger entries are posted, the forecast naturally evolves. This is by design - you are always seeing the most current projection. If you need to compare forecasts over time, consider taking screenshots or exporting the data at regular intervals (for example, at each monthly S&OP meeting).

Q: The Cash Flow Forecast shows a large drop in the bank balance in one period. How do I investigate?

A: A sudden drop usually means a large cash outflow is expected in that period - such as a major vendor payment, a large purchase order, or a significant overhead expense. Open the Cash Flow Forecast as a standalone report (from Q360's reports menu, not the dashboard) to see the detailed breakdown by category (AR collections, project costs, AP payments, overhead) for that specific period. The standalone report also offers drill-down links to individual invoices, customers, and accounts.

Q: Can I view the forecast by week instead of by month?

A: Yes. Change the Time Units filter from Month to Week. Note that weekly projections divide monthly averages evenly across weeks, so the weekly view assumes uniform distribution of revenue and costs within each month. If your business has significant intra-month timing patterns (for example, payroll on the 15th and 30th), the weekly view may not capture those peaks and valleys precisely.

Q: What happens if project managers have not updated their cost forecasts recently?

A: The accuracy of both charts depends heavily on up-to-date project data. If project cost forecasts, labor schedules, and material release dates are stale, the projections will be based on outdated assumptions. Before each monthly S&OP meeting, project managers should update their project schedules and cost forecasts. This is the single most important data preparation step for making the One Dashboard reliable.

Q: Why does the chart show a flat line for variable revenue in all future periods?

A: Variable revenue is projected by averaging the last several months of actual non-project, non-contract revenue and carrying that average forward evenly. By definition, this produces a flat projection. If you know that variable revenue will change in the future (due to seasonal patterns, new service offerings, or known contracts), use the Variable Revenue Adjustment percentage to scale the projection up or down.

Q: The forecast shows negative Total Cost on the Break Even chart. Is that an error?

A: No. Costs are displayed as negative values on the chart by accounting convention. The red Total Cost line runs below zero, while the green Total Revenue line runs above zero. Net Profit is calculated as revenue plus costs (since costs are negative, this effectively subtracts costs from revenue). When Net Profit is above zero, the organization is projected to be profitable.

Related Dashboards

- **Executive Dashboard** - Provides the current-state complement to this dashboard. While the One Dashboard projects where the business is heading, the Executive Dashboard shows where it stands right now - current balances, recent trends, and activity levels across every function. Use both together for a complete picture.
- **Accounts Receivable** - Investigate the composition and aging of your receivables when the Cash Flow Forecast shows concern about collection timing.
- **Cash Position** - Review your detailed cash and bank account balances when you need more specificity than the Cash Flow Forecast's starting bank balance provides.
- **Cash Forecast** - A dedicated, detailed version of the cash flow projection with additional breakdown and drill-down capabilities beyond what the dashboard widget provides.
- **Revenue Dashboard** - Analyze actual revenue by type and period when the Break Even Forecast's revenue projection needs to be grounded against recent actuals.
- **Project Overview** - Review individual project health and status when the Break Even Forecast's project revenue projection raises questions about specific projects.
- **Sales Opportunities** - Evaluate the pipeline in detail when you are considering whether to include opportunities in the forecast.

- **Time Billing Summary** - Understand billing patterns when the variable revenue projection on the Break Even Forecast needs context about billing cadence and volume.

Finance & Accounting Dashboards

These dashboards give finance teams, controllers, and CFOs visibility into cash flow, receivables, invoicing, revenue performance, and billing activity. They are the financial nerve center of Q360 - connecting what you have billed, what you are owed, what cash you have on hand, where that cash is heading, and how revenue and expenses compare across your organization.

Finance dashboards serve two audiences. For the accounting team, they provide the daily and weekly monitoring tools needed to stay on top of collections, reconcile balances, and prepare for month-end closing. For leadership, they provide the financial context needed for strategic decisions - whether to invest, hire, or tighten spending - grounded in real numbers rather than gut feel.

The five dashboards in this section form a natural progression. The Accounts Receivable dashboard shows what customers owe you. The Cash Position dashboard shows how much cash you actually have. The Cash Forecast dashboard projects where your cash is heading over the next 6 to 24 months. The Revenue Dashboard shows how much you are earning and spending. And the Time Billing Summary dashboard reveals how employee time - the raw material of labor cost - is being allocated across the business.

Together, these dashboards support the monthly financial review, the S&OP meeting, and the quarterly course correction that form the backbone of the executive operating rhythm.

Accounts Receivable Dashboard

Path: Dashboards > ACCOUNTING > Accounts Receivable

Roles: Finance teams, controllers, credit managers, sales leadership, and executive management - anyone responsible for monitoring customer payments, managing collections, or assessing cash flow risk.

Permission: Users must have access to the Dashboards menu in Q360. If the Accounts Receivable dashboard does not appear in your menu, contact your Q360 administrator to request access.

Purpose

The Accounts Receivable dashboard gives you a real-time snapshot of money owed to your company and how effectively you are collecting it. It answers questions like:

- How much money do our customers owe us right now?
- How much have we invoiced this month compared to last month?
- How quickly are we collecting - is our Days Sales Outstanding (DSO) improving or worsening?
- How much of our outstanding receivables is overdue and at risk?
- Which branches, departments, or sales reps have the largest outstanding balances?
- Who are our biggest debtors, and how old are their invoices?
- Is our overall aging profile getting better or worse over time?

In Q360's accrual accounting model, revenue is recognized when earned - not when cash is received. That means the gap between what you have earned and what you have collected is your accounts receivable. This dashboard monitors that gap and helps you close it.

Data Included

This dashboard shows all outstanding (unpaid) customer invoices that have been posted in Q360. An invoice appears here as long as it has a remaining balance - meaning the customer has not yet paid in full.

The following are included:

- All posted invoices with a remaining balance, across all companies, branches, and departments (unless you apply a filter)
- Credit memos and write-offs, which appear as negative balances and reduce the total
- Invoices of all types and sale types (projects, service calls, orders, service contracts)

The following are **not** included:

- Fully paid invoices (zero balance remaining)
- Voided invoices
- Draft or unposted invoices that have not yet been finalized
- Cash receipts or payment records (these reduce invoice balances but are not shown as separate items)

Dashboard Filters

Filter	Behavior	Default
Company	Narrows to a specific company (legal entity)	All companies
Branch	Narrows to a specific branch	All branches

Dashboard Widgets

This dashboard contains ten widgets arranged across the screen. The top row provides four headline metrics as gauges. The middle section breaks down AR by aging, branch, department, and sales rep, alongside a list of your largest customer balances. The bottom section shows how your aging profile has changed over the past 12 months.

Widget: Current AR

Description: A large number displaying your total outstanding accounts receivable balance as of today - the total amount customers owe you across all posted, unpaid invoices.

Data Source: This is the net sum of all invoice balances in Q360, minus any payments, credits, and write-offs that have been applied. It reflects the current state of your receivables ledger.

Interpreting Widget: This is your single most important collections metric. The color coding provides a quick health check:

- **Red:** Outstanding AR is between $0 and $100,000
- **Yellow:** Outstanding AR is between $100,000 and $500,000
- **Green:** Outstanding AR is $500,000 or higher

The color thresholds are configured by your Q360 administrator to reflect what is normal for your business. A large organization with high invoice volume will naturally have a higher "healthy" AR balance than a small one.

Widget Filtering: This gauge responds to the Company and Branch filters. Change either to see AR for a specific entity or location.

Drilldown: This gauge updates when you interact with other widgets on the dashboard.

Data Quality Note: Current AR can occasionally be negative. This happens when credits, refunds, or write-offs exceed outstanding invoices - it means your company has a net credit balance owed back to customers. While uncommon, it is not an error.

Widget: Invoiced Month-to-Date

Description: A gauge showing the total dollar amount invoiced to customers in the current calendar month, from the 1st through today.

Data Source: The sum of all invoices posted in the current month, excluding voided invoices, credit adjustments, and payment entries. Only standard billing invoices are counted.

Interpreting Widget: This tells you how much billing activity has occurred so far this month. The color coding reflects invoicing volume:

- **Red:** $0 to $50,000 invoiced this month
- **Yellow:** $50,000 to $500,000 invoiced
- **Green:** $500,000 to $1,000,000 or higher invoiced

Widget Filtering: Responds to Company and Branch filters.

Drilldown: This gauge updates when you interact with other widgets.

Data Quality Note: Because this is a partial month (month-to-date), comparing it directly to the Invoiced Last Month gauge requires mental adjustment. If today is the 15th, you are seeing roughly half a month of activity compared to a full month.

Widget: Invoiced Last Month

Description: A gauge showing the total dollar amount invoiced in the previous calendar month - a complete, closed period.

Data Source: The sum of all invoices posted in the prior calendar month, using the same inclusion criteria as the Month-to-Date gauge.

Interpreting Widget: This is your most recent full-month invoicing benchmark. Use it to assess whether the current month is tracking ahead of or behind last month's pace. The same color thresholds apply:

- **Red:** $0 to $50,000
- **Yellow:** $50,000 to $500,000
- **Green:** $500,000 to $1,000,000 or higher

Widget Filtering: Responds to Company and Branch filters.

Drilldown: This gauge updates when you interact with other widgets.

Widget: Days Sales Outstanding (DSO)

Description: A gauge displaying your Year-to-Date Days Sales Outstanding - a measure of how many days it takes, on average, to collect payment after an invoice is issued.

Data Source: DSO is calculated using a trailing 12-month window. The formula takes the average daily AR balance over that period, divides it by total revenue over the same period, and multiplies by the number of days. This produces a single number that represents your average collection speed.

Interpreting Widget: Lower DSO means faster collections and stronger cash flow. A DSO of 45 means you collect, on average, within about 45 days of invoicing. Industry benchmarks vary - service businesses often target 30–45 days, while construction and integration firms may run 45–90 days depending on contract terms. Track this number month over month to see whether your collection performance is improving or deteriorating.

Widget Filtering: Responds to Company and Branch filters.

Drilldown: This gauge updates when you interact with other widgets.

Data Quality Note: DSO uses a rolling 12-month window, not your fiscal year. If your organization compares DSO to fiscal-year metrics, be aware the time frames may not align exactly. Also, if your company had zero revenue in the trailing 12 months (for example, a brand-new entity), DSO will display as 0 - this does not mean instant collection; it means the calculation could not run.

Widget: Aging Group

Description: A pie chart breaking down your total outstanding AR into four age buckets, showing what proportion of your receivables falls into each aging category.

Data Source: Every unpaid invoice is classified by the number of days since its invoice date (not its due date). The four buckets are:

- **0–30 days:** Invoices issued within the last 30 days - typically current and within normal payment terms
- **31–60 days:** Invoices 31 to 60 days old - moderately overdue for most payment terms
- **61–90 days:** Invoices 61 to 90 days old - significantly overdue and requiring attention
- **91+ days:** Invoices over 90 days old - highest risk for non-collection

Interpreting Widget: A healthy AR profile has most of its value in the 0–30 day bucket. As the proportion in the 61–90 and 91+ buckets grows, your collection risk increases. If more than 20–30% of your AR is over 60 days old, your collections process likely needs attention.

Widget Filtering: Responds to Company and Branch filters. This chart always shows current aging as of today - it does not respond to custom date ranges.

Drilldown: Click any slice to filter the other charts and the customer grid to show only invoices in that aging bucket.

Widget: AR By Branch

Description: A bar chart showing the total outstanding AR balance broken down by branch.

Data Source: All unpaid invoices, grouped by the branch recorded on each invoice.

Interpreting Widget: Each bar represents one branch. Taller bars indicate higher outstanding balances at that location. Use this to identify which branches may need collection support or have customers with slower payment patterns.

Widget Filtering: Responds to Company and Branch filters.

Drilldown: Click any bar to filter the customer grid and other charts to show only that branch's receivables.

Widget: AR By Department

Description: A bar chart showing the total outstanding AR balance broken down by department.

Data Source: All unpaid invoices, grouped by the department recorded on each invoice.

Interpreting Widget: Each bar represents one department. Compare bars to identify which departments are generating invoices that are collected more slowly.

Widget Filtering: Responds to Company and Branch filters.

Drilldown: Click any bar to filter the other widgets to show only that department's receivables.

Widget: AR By Sales Rep

Description: A bar chart showing the total outstanding AR balance broken down by the sales representative assigned to each invoice.

Data Source: All unpaid invoices, grouped by the salesperson recorded on each invoice. If a salesperson belongs to a sales team, they may be grouped under the team name.

Interpreting Widget: Each bar represents one sales rep (or sales team). This helps leadership identify whether specific reps have customers with collection challenges. A high bar does not necessarily mean poor performance - it may simply reflect that rep's customer mix or contract terms.

Widget Filtering: Responds to Company and Branch filters.

Drilldown: Click any bar to filter other widgets to show only that rep's receivables.

Widget: Top 25 AR By Customer

Description: A detailed grid listing the 25 customers with the highest outstanding balances, showing their total balance, average invoice age, and number of unpaid invoices.

Data Source: All unpaid invoices, summed by customer and sorted from highest to lowest balance.

Columns Displayed:

Column	Description
Customer	The customer account name
Balance	Total outstanding (unpaid) amount for this customer
Avg. Age	The average number of days since invoice date across all unpaid invoices for this customer
Invoices	The count of unpaid invoices for this customer

Interpreting Widget: This is your collection priority list. Customers at the top owe the most. Cross-reference the Balance with the Avg. Age: a customer with a large balance and a high average age is your highest collection risk. A customer with a large balance but low average age may simply be within normal payment terms.

Widget Filtering: Responds to Company and Branch filters. Always shows the top 25 customers within your selected filters.

Drilldown: Click a customer row to drill into that customer's individual invoices and payment history.

Widget: AR Aging Trend

Description: A multi-line area chart showing how your outstanding AR has changed over the past 12 months. Three trend lines display Current AR (total), 31–90 Day AR, and 91+ Day AR over time.

Data Source: Monthly snapshots of your AR balance, taken and stored at the end of each month. Each snapshot captures how much was outstanding and how it was distributed across aging buckets at that point in time.

Interpreting Widget: Use this chart to spot trends in your collection performance over time:

- If the 91+ day line is rising, more invoices are going unpaid for longer - your collection risk is increasing.
- If the 91+ day line is falling, collections are improving - old invoices are being resolved.
- If the total Current AR line is rising alongside revenue growth, that may be healthy. If it is rising while revenue is flat or declining, you may be accumulating bad debt.

Widget Filtering: Responds to Company and Branch filters. Always displays a 12-month trailing window.

Drilldown: Hover over the chart to see exact balances at any monthly snapshot point.

Data Quality Note: This chart uses monthly snapshots, not real-time data. The snapshot reflects AR as it appeared on the last day of each past month. If you compare this chart to the Aging Group pie chart (which is real-time as of today), the numbers may not match exactly - the pie chart is more current, while the trend chart shows where you were at month-end.

Widgets Relationship

Start with the four gauges at the top to understand your AR health at a glance: how much is outstanding (Current AR), how much you have invoiced recently (MTD and Last Month), and how fast you are collecting (DSO).

Next, use the Aging Group pie chart to assess risk: how much of your AR is current versus overdue? If the 91+ slice is large, drill into the customer grid to identify which accounts need immediate collection attention.

The three "By" charts (Branch, Department, Sales Rep) help you locate where collection problems are concentrated. If one branch has a disproportionately large bar, that branch may need targeted collection support.

The Top 25 AR By Customer grid gives you a prioritized action list. Focus on customers with the highest combination of balance and average age - those represent the greatest cash flow risk.

Finally, the AR Aging Trend chart puts everything in context. Is the situation improving or getting worse? Are your collection efforts producing results over time?

Data Freshness

The gauges, aging charts, and customer grid pull data each time the dashboard loads or refreshes. They reflect the current state of your receivables ledger in real time - as soon as an invoice is posted or a payment is applied, the numbers update on your next refresh.

The AR Aging Trend chart updates monthly, using end-of-month snapshots. This means the most recent point on the trend chart may lag current reality by several days, depending on where you are in the month.

Frequently Asked Questions

Q: Why does the AR Aging Trend chart not match the Aging Group pie chart exactly?

A: The pie chart shows real-time aging as of today. The trend chart uses end-of-month snapshots. Mid-month, these will differ because invoices have aged further since the last snapshot. Both are correct - they just reflect different points in time.

Q: Can the Current AR gauge be negative?

A: Yes. This happens when credits, refunds, or write-offs exceed outstanding invoices - it means you have a net credit balance owed back to customers. While uncommon, it is not an error.

Q: Our DSO shows as 0. Does that mean we collect instantly?

A: No. A DSO of 0 typically means no revenue was recorded in the trailing 12-month period used for the calculation. If that is unexpected, check that invoices are being posted correctly and that revenue recognition is running on schedule.

Q: Why is aging measured from invoice date instead of due date?

A: Invoice date provides a consistent, objective starting point across all customers regardless of their individual payment terms. This makes it possible to compare aging across your entire customer base on a level playing field.

Q: I changed the date filter, but the aging charts did not change. Why?

A: The aging charts and customer grid always show current outstanding balances as of today. They do not support historical point-in-time views. To see how AR looked at a previous month-end, use the AR Aging Trend chart, which stores monthly snapshots.

Q: A customer appears in the Top 25 list with a high balance but low average age. Should I be concerned?

A: Not necessarily. A high balance with a low average age (under 30 days) usually means the customer has recent, large invoices that are still within normal payment terms. Monitor them, but focus your collection efforts on customers with both high balances and high average ages.

Q: How do I know if our DSO is good or bad?

A: Compare your DSO to three benchmarks: your own historical trend (is it improving?), your stated payment terms (if terms are net-30 but DSO is 60, you are collecting twice as slowly as expected), and industry norms for your sector. Even a small improvement in DSO can translate to meaningful cash flow benefits.

Q: I see invoices for a customer I do not recognize. Is this a data error?

A: The customer may be inactive, a one-time buyer, or a subsidiary. Check the customer record in Q360 to verify. If the customer is no longer active and the invoices are old, this may be a write-off candidate - consult your accounting team.

Related Dashboards

- **Executive Dashboard** - Includes a Current AR gauge as part of its cross-functional summary. Start there for a quick number, then come to Accounts Receivable for the full aging breakdown and collection detail.
- **Cash Position** - Shows your actual bank balances alongside AR. Use both together to understand the relationship between what you are owed and what you actually have in the bank.
- **Cash Forecast** - Projects future cash inflows based on AR collection assumptions. When the forecast shows concern about collection timing, come here to investigate which customers or invoices are driving the risk.
- **Revenue Dashboard** - Shows recognized revenue by source and period. Use it alongside AR to understand the gap between revenue earned and revenue collected.

Cash Position Dashboard

Path: Dashboards > ACCOUNTING > Cash Position

Roles: CFOs, controllers, finance managers, operations leaders, and anyone responsible for cash flow management and business liquidity.

Permission: Users must have access to the Dashboards menu in Q360. If the Cash Position dashboard does not appear in your menu, contact your Q360 administrator to request access.

Purpose

The Cash Position dashboard is your daily liquidity check. It combines actual bank balances with invoicing metrics, receivables, and cash flow trends to give you a complete picture of your cash health. It answers questions like:

- How much cash do we have in our bank accounts right now?
- Are we billing enough to maintain our cash position?
- What is our total outstanding receivables, and how quickly are we collecting?
- How has our invoicing volume trended over the past year?
- Are our monthly cash inflows keeping pace with our outflows?

This is the dashboard you check first thing in the morning to confirm your organization's financial footing.

Data Included

This dashboard draws from several areas of Q360:

- **Bank account balances:** Current balances for all active bank accounts in your chart of accounts (as of today)
- **Invoiced amounts:** Total invoicing activity for the current month and the previous month
- **Outstanding receivables:** Total unpaid customer invoices
- **Days Sales Outstanding (DSO):** Your collection efficiency metric over the trailing 12 months
- **Invoicing trends:** Monthly invoicing volumes over a configurable period (default: last 12 months)
- **Cash inflows and outflows:** Monthly cash movement totals for the last 12 months

The following are **not** included:

- Historical bank balances (the bank balance widget always shows today's position, not a past date)
- Voided invoices or system-generated invoices (excluded from the invoicing trend)
- Inactive bank accounts
- Projected or forecasted cash (see the Cash Forecast dashboard for forward-looking projections)

Dashboard Filters

Filter	Behavior	Default
Company	Limits all data to a specific company (legal entity)	All companies
Branch	Narrows to a specific branch	All branches

When you change the Company or Branch filter on the Invoicing Trend chart, that selection propagates to the gauges, bank balance table, and cash in/out chart.

Dashboard Widgets

This dashboard contains seven widgets. The top section displays four financial gauges. The middle section shows an invoicing trend chart alongside a bank balance table. The bottom section presents a 12-month cash in/out comparison.

Widget: Invoiced Month-to-Date

Description: A gauge showing the total dollar amount invoiced to customers in the current calendar month (from the 1st through today).

Data Source: The sum of all invoices posted in the current month, excluding voided invoices, credit adjustments, and payment entries.

Interpreting Widget: This tells you how much billing activity has occurred so far this month. The color coding reflects invoicing volume:

- **Red:** $0 to $50,000 invoiced
- **Yellow:** $50,000 to $500,000 invoiced
- **Green:** $500,000 or higher invoiced

Widget Filtering: Responds to Company and Branch filters.

Drilldown: This gauge updates when you interact with other widgets on the dashboard.

Data Quality Note: This is a partial month, so avoid comparing it directly to the full prior month without adjusting for elapsed days.

Widget: Invoiced Last Month

Description: A gauge showing the total dollar amount invoiced in the previous calendar month - a complete, closed period.

Data Source: The sum of all invoices posted in the prior calendar month, using the same criteria as the Month-to-Date gauge.

Interpreting Widget: This is your most recent full-month invoicing benchmark. The same color thresholds apply as the MTD gauge.

Widget Filtering: Responds to Company and Branch filters.

Drilldown: This gauge updates when you interact with other widgets.

Widget: Current AR

Description: A gauge displaying the total outstanding accounts receivable balance - the total amount customers owe you as of today.

Data Source: The net sum of all posted, unpaid invoice balances, minus credits and write-offs that have been applied.

Interpreting Widget: This represents cash you have earned but not yet received. A rising AR balance may indicate growing revenue or slowing collections. Cross-reference with DSO to distinguish between the two.

Widget Filtering: Responds to Company and Branch filters.

Drilldown: For a detailed aging breakdown, use the Accounts Receivable dashboard.

Widget: Days Sales Outstanding (DSO)

Description: A gauge displaying your Days Sales Outstanding over the trailing 12 months - how many days, on average, it takes to collect payment after invoicing.

Data Source: Calculated from the average daily AR balance divided by total revenue over the trailing 12-month window, multiplied by the number of days.

Interpreting Widget: Lower is better. A DSO of 45 means you collect in about 45 days on average. Compare this to your payment terms and industry norms. If DSO is significantly higher than your stated terms (for example, DSO of 75 when terms are net-30), collections need attention.

Widget Filtering: Responds to Company and Branch filters.

Drilldown: For detailed collection analysis, use the Accounts Receivable dashboard.

Widget: Invoicing Trend

Description: A bar chart showing your monthly invoicing volume over the past 12 months (configurable). Each bar represents one month's total invoiced amount.

Data Source: All posted invoices within the selected date range, excluding voided invoices, system-generated conversion records, and cash receipt entries. Each invoice is counted in the month it was posted.

Interpreting Widget: Look for seasonal patterns, growth trends, or anomalies. A month with an unusually low bar may indicate a billing backlog - invoices created but not yet posted. A month with an unusually high bar may reflect a large project milestone or catch-up billing.

Widget Filtering: Responds to Company and Branch filters. You can also adjust the time period displayed.

Drilldown: Click any bar to drill into the individual invoices for that month.

Data Quality Note: This chart reflects the date invoices were posted, not when they were created or sent. If your billing team posts invoices on a weekly schedule, the most recent partial week may not yet be reflected.

Widget: Bank Balance

Description: A table listing all active bank accounts with their current balances. Columns show Account Number, Description, Type, and Balance.

Data Source: Your general ledger, specifically all accounts designated with a Bank Flag. Only active accounts are shown - inactive or closed accounts are excluded.

Interpreting Widget: This is your real-time cash position. Sum the balances in the table to see your total cash on hand. Each row is one bank account - checking, savings, or other accounts your organization has designated as bank-type in the chart of accounts.

Widget Filtering: Responds to Company and Branch filters.

Drilldown: Click an account row to see transaction details for that account.

Data Quality Note: The Bank Balance always displays today's position. Even if you apply a date filter elsewhere on the dashboard, this table still shows the current balance, not a historical one. If you need a historical bank balance (for example, as of last month-end), use a dedicated bank reconciliation report or contact your accounting team. Additionally, the balance shown is from the general ledger - if your bank reconciliation is not current, the ledger balance may differ from your actual bank statement.

Widget: Cash In/Out

Description: A paired-bar chart showing monthly cash inflows versus cash outflows for the last 12 months. Each month displays two bars side by side - one for cash coming in and one for cash going out.

Data Source: Monthly snapshots of cash movement stored in Q360's BI data. These snapshots are generated periodically (typically nightly) and summarize all cash-related transactions for each month.

Interpreting Widget: A month where the "cash in" bar is taller than the "cash out" bar means you added to your cash reserves that month. A month where "cash out" exceeds "cash in" means you drew down reserves. Track the pattern across 12 months to understand your operating cash flow cycle - most businesses have predictable patterns tied to billing cycles, payroll, and vendor payment schedules.

Widget Filtering: Responds to Company filter.

Drilldown: Click a bar to drill into the underlying transactions for that month.

Data Quality Note: Because this data comes from periodic snapshots rather than real-time transactions, it may lag behind actual activity by a few hours or up to a day. It is best used for trend analysis and monthly reviews, not same-day cash monitoring. For the most current cash position, refer to the Bank Balance table above.

Widgets Relationship

Think of the Cash Position dashboard as a conversation between four questions:

1. **How much cash do we have?** - The Bank Balance table answers this directly.
2. **Are we billing enough?** - The Invoiced MTD and Invoiced LM gauges show your billing pace.
3. **When will invoiced amounts become cash?** - Current AR and DSO show how much is still owed and how long collection takes.
4. **What is the cash flow trend?** - The Invoicing Trend and Cash In/Out charts show whether your billing and cash patterns are stable, growing, or declining.

These widgets together tell you whether your business is generating sufficient invoicing to sustain its cash position and whether collections are keeping pace. If invoicing is strong but DSO is rising, you may have a collection bottleneck. If the Cash In/Out chart shows consecutive months of net outflow, your business is consuming cash faster than it is generating it.

Important: *The sum of Bank Balance totals is not the same as Current AR. They measure different things - Bank Balance is cash you have in the bank today; Current AR is cash customers owe you but have not yet paid. Together, Bank Balance plus Current AR approximates your total liquid position.*

Data Freshness

The gauges, invoicing trend, and bank balance table pull live data each time the dashboard loads or refreshes. They reflect the current state of your general ledger.

The Cash In/Out chart uses periodic snapshots, typically updated daily. Allow a few hours for the most recent transactions to appear in the snapshot data.

Frequently Asked Questions

Q: Why does my Bank Balance not equal my Current AR?

A: They measure different things. Bank Balance is your actual cash in the bank. Current AR is the amount customers owe you but have not paid yet. They will not match because customers take time to pay. Think of it this way: Bank Balance is what you have; Current AR is what you are owed.

Q: The Bank Balance does not change even when I apply a date filter. Why?

A: By design, the Bank Balance table always shows your position as of today. It answers "How much cash do we have right now?" If you need a historical bank balance snapshot, contact your accounting team for a period-end statement or bank reconciliation report.

Q: I see a bank account that we closed months ago. How do I remove it?

A: A bank account appears on this dashboard if it is still marked as active in your chart of accounts. Ask your accounting team to mark the account as inactive. Once marked inactive, it will no longer appear.

Q: The Invoicing Trend shows less activity in recent weeks than I know we have invoiced. Is the data wrong?

A: It is likely a timing issue. The invoicing trend reflects invoices that have been posted (finalized), not invoices that have been created or sent. If your billing team posts invoices on a weekly cycle, the current partial week may not yet appear. Check back after your next billing run.

Q: Can I compare Invoiced MTD directly to Invoiced LM?

A: Not directly, because the current month is incomplete. If today is the 15th of a 30-day month, MTD represents only half a month compared to LM's full month. To compare fairly, you would need to estimate a full-month run rate - for example, MTD ÷ days elapsed × days in the month.

Q: What invoices are excluded from the Invoicing Trend chart?

A: Voided invoices and certain system-generated records (conversion adjustments, cost-of-goods-sold entries, and cash receipt records) are excluded. These are not standard customer billing invoices and would distort the trend if included.

Q: How often should we review the Cash Position dashboard?

A: At minimum, weekly during normal operations. Many finance teams check it daily as part of their morning cash management routine. During tight cash periods or month-end, daily review is recommended. After month-end close, use it as a key input to your financial review meeting.

Related Dashboards

- **Executive Dashboard** - Provides a high-level summary that includes key cash and AR metrics alongside sales, projects, service, and HR indicators.
- **Accounts Receivable** - Dive into the detailed aging analysis and collection insights behind the Current AR number shown here.
- **Cash Forecast** - Project your cash position forward by months or weeks to anticipate shortfalls or surpluses before they arrive.
- **Revenue Dashboard** - Understand the revenue drivers behind your invoicing trends and profitability by branch and department.

Cash Forecast Dashboard

Path: Dashboards > ACCOUNTING > Cash Forecast

Roles: CFOs, controllers, finance managers, project managers, and operations leaders who need to plan for liquidity, anticipate cash shortfalls, and model "what-if" scenarios.

Permission: Users must have access to the Dashboards menu in Q360. If the Cash Forecast dashboard does not appear in your menu, contact your Q360 administrator to request access.

Purpose

The Cash Forecast dashboard is Q360's most powerful forward-looking financial tool. It projects your cash position over the next 6 to 24 periods (weeks or months) by combining your current bank balance with all known and estimated inflows and outflows. It answers questions like:

- What will our bank balance look like 3, 6, or 12 months from now?
- When might we face a cash shortfall?
- Which revenue streams - AR collections, project invoicing, or service contracts - are driving our cash position?
- How do planned overhead expenses compare to expected revenue?
- What happens to our cash position if we change our assumptions about collections, project timing, or spending?

This dashboard is central to the monthly S&OP meeting and quarterly financial review. It helps leadership anticipate results rather than react to them, and it supports informed decisions about hiring, purchasing, and investment timing.

Data Included

The forecast starts with your actual bank balance as of today and projects forward by adding expected inflows and subtracting expected outflows for each period:

Cash inflows include:

- **Accounts receivable collections:** Outstanding customer invoices, projected to be collected based on their due dates or your customers' average payment history
- **Project invoice revenue:** Scheduled billing milestones from active projects
- **Service contract billing:** Expected invoicing from active service contracts based on their billing cycles (monthly, quarterly, annual, etc.)
- **Sales opportunity revenue (optional):** Probability-weighted revenue from qualified sales opportunities in your pipeline

Cash outflows include:

- **Accounts payable:** Outstanding vendor invoices due for payment
- **Project material and subcontractor costs:** Pending purchase orders and material costs for active projects (excluding labor, which is already captured in overhead)
- **Operating overhead:** Estimated fixed costs based on an average of your recent months' actual expenses, scaled by an adjustment factor you set

Not included:

- Non-cash transactions such as depreciation, amortization, or accruals
- One-time or unbudgeted expenses not already recorded in Q360
- Tax payments, loan repayments, or other obligations not captured in your general ledger expense accounts flagged for overhead

Dashboard Filters

This dashboard offers more user-adjustable parameters than any other dashboard in Q360, allowing you to model different scenarios:

Filter	Behavior	Default
Company	Limits the forecast to a specific company (legal entity)	All companies
Branch	Limits the forecast to a specific branch	All branches
Number of Periods	Sets the forecast horizon: 6, 12, 18, or 24 periods ahead	12
Time Unit	Shows the forecast by Month or by Week	Month
Include Project Invoices	When checked, adds expected project billing to the forecast	Yes
Include Project Costs	When checked, subtracts expected project material and subcontractor costs	Yes
Include S.C. Invoices	When checked, adds expected service contract billing	Yes
Base Currency	Converts all amounts to a single currency (for multi-currency organizations)	All (no conversion)
Age By	Determines how collection timing is estimated - by invoice due date or by each customer's average payment history	Due Date
Periods to Collect	Spreads overdue AR collections across this many future periods instead of assuming they are all collected immediately. Leave blank to assume immediate collection.	Blank
Fixed Periods to Average	How many months of recent expense history to average when estimating future overhead (3 means average the last 3 months)	3
Fixed Adjustment %	A scaling factor for projected overhead - 100% uses the historical average as-is; 120% increases it by 20%; 80% reduces it by 20%	100%

Filter	Behavior	Default
Number of Previous Periods	How many historical periods to display before the forecast (0, 1, 3, or 6)	Not set (forecast only)
Include Opportunities	When set to Yes, adds probability-weighted sales opportunity revenue and costs to the forecast	No
Opportunity Probability	The minimum win probability an opportunity must have to be included (only applies when Include Opportunities is Yes)	70

Tip: *Start with the defaults for a baseline forecast. Then experiment with the adjustment parameters to model scenarios - for example, "What if overhead increases 20%?" or "What if we exclude project costs?" or "What if we include only high-probability opportunities?"*

Dashboard Widgets

This dashboard contains three widgets, all powered by the same underlying forecast calculation. The data grid at the bottom provides the detailed numbers; the two charts above provide visual interpretations.

Widget: Cash Forecast Line Chart

Description: A dual-area chart spanning the top of the dashboard. The green filled area represents your projected bank balance at the end of each period. The red filled area underneath represents your estimated overhead costs per period. The horizontal axis shows each forecast period (by month or week).

Data Source: The bank balance line is calculated cumulatively: it starts with today's actual bank balance, then for each period, adds all expected inflows (AR collections, project invoices, service contract billing) and subtracts all expected outflows (accounts payable, project costs, overhead). Each period's ending balance becomes the next period's starting balance. The overhead line represents your estimated fixed operating costs, averaged from recent months' actual expenses.

Interpreting Widget: Watch for trends and critical thresholds:

- An upward-trending green area means cash is accumulating - a healthy sign.
- A flat green area means inflows roughly equal outflows - you are breaking even on cash.
- A downward-trending green area means you are consuming cash faster than it is coming in.
- **If the green area touches or crosses zero, you face a projected cash shortfall in that period.** This is the most critical signal on the dashboard.

The red overhead area shows your fixed cost burden. The gap between the green and red areas represents your operating cushion - the amount of cash above your fixed obligations.

Widget Filtering: Responds to all filters. Changing any parameter recalculates the entire forecast.

Drilldown: Hover over any point on the chart to see exact bank balance and overhead values for that period.

Data Quality Note: The forecast can show negative bank balances. There is no visual alert or special formatting for this - you must watch the numbers yourself. When you see a negative projection, take action: accelerate collections, delay discretionary spending, or secure short-term financing.

Widget: Cash Flow Sources Bar Chart

Description: A grouped bar chart in the middle of the dashboard showing the breakdown of cash inflows by source for each period. Three bar series appear:

- **AR:** Combined overdue and current accounts receivable collections expected in that period
- **Projects:** The net of project invoice revenue minus project material/subcontractor costs
- **Service Contracts:** Expected service contract billing for that period

Data Source: AR figures come from your open invoices, timed by due date or customer payment history. Project invoice figures come from scheduled project billing milestones. Project costs come from pending purchase orders and material commitments. Service contract figures come from active contract billing schedules.

Interpreting Widget: Taller bars mean stronger cash inflows in that period. If AR dominates every period, your cash depends heavily on customer collections. If project invoices dominate, your cash is tied to project milestone timing. If service contracts contribute a significant and consistent share, you have predictable recurring revenue - a healthy sign.

Periods with very short bars across all sources indicate potential cash gaps. The Project bar can occasionally appear small or even negative in periods where expected project costs exceed expected project invoicing.

Widget Filtering: Responds to all filters. Toggling "Include Project Invoices," "Include Project Costs," or "Include S.C. Invoices" off removes those components from the chart.

Drilldown: Hover over individual bars to see the exact dollar amount for each source in that period.

Widget: Cash Flow Forecast Summary Grid

Description: A detailed data table at the bottom of the dashboard with one row per period and a column for each cash flow component.

Columns Displayed:

Column	Description
Period	The month or week label for this period
Bank Start	Projected bank balance at the start of the period (carried forward from the prior period)
AR Overdue	Overdue receivables expected to be collected in this period
AR Current	Current (non-overdue) receivables expected to be collected
Proj. Invoice	Expected project billing revenue
Proj. Cost	Expected project material and subcontractor costs (shown as a negative, representing cash outflow)
S.C. Invoice	Expected service contract billing
A.P.	Accounts payable due (shown as a negative, representing cash outflow)
Oppor Revenue	Sales opportunity revenue (only when Include Opportunities is Yes)
Oppor Cost	Sales opportunity costs (only when Include Opportunities is Yes)
Overhead	Estimated fixed operating costs (shown as a negative)
Delta	The net cash change for the period - the sum of all inflows minus all outflows

Data Source: Each cell is calculated from your live Q360 data: open invoices, project schedules, service contract records, vendor payables, and expense history.

Interpreting Widget: Read left to right across each row to understand the components driving that period's cash change. The Delta column tells you whether the period is a net cash gain (positive Delta) or net cash drain (negative Delta). The Bank Start column shows your cumulative position - it is the running total that the line chart visualizes.

Focus on periods where Bank Start is lowest or Delta is most negative. These are your tightest cash periods. Examine which columns are driving the outflows - is it a large AP payment? High overhead? Project costs exceeding project invoicing?

Widget Filtering: Responds to all filters. This grid is the single source of truth for the two charts above.

Drilldown: No drilldown. Informational only.

Widgets Relationship

All three widgets show the same data from different perspectives:

- The **Line Chart** answers "What is the trend?" - is cash growing, stable, or declining?
- The **Bar Chart** answers "Where does the cash come from?" - which revenue streams drive each period?
- The **Summary Grid** answers "What are the exact numbers?" - the detailed breakdown for precise analysis.

When you change any filter, all three widgets recalculate simultaneously. This makes the dashboard ideal for "what-if" modeling: adjust a parameter, and instantly see the impact across all views.

A typical workflow: Scan the line chart for any period where the green area approaches zero. If you see one, switch to the bar chart to understand which revenue source is weak in that period. Then open the summary grid to examine the exact numbers and decide what corrective action to take.

Data Freshness

The forecast recalculates every time you load the dashboard, using the most current data available: today's bank balance, today's open invoices and their due dates, today's project schedules, today's service contract records, and the most recent months' actual expenses for overhead estimation. If you make changes in Q360 (post an invoice, update a project schedule, add a vendor invoice), the forecast reflects those changes the next time you refresh.

Frequently Asked Questions

Q: Can the projected bank balance go negative?

A: Yes. If projected outflows exceed inflows in any period, the bank balance line will dip below zero. The dashboard does not display a warning - you must watch for this yourself. A negative projection means you may need to accelerate collections, defer spending, or arrange short-term financing for that period.

Q: The overhead projection seems too high (or too low). How do I adjust it?

A: Use two parameters. First, "Fixed Periods to Average" controls how many months of recent expenses are averaged - if a recent month included a one-time cost, increase the window to smooth it out. Second, "Fixed Adjustment %" lets you scale the projection up or down - set it to 80% to model a 20% reduction in overhead, or 120% to model a 20% increase.

Q: Why does the forecast show all overdue AR collected in the first period?

A: By default, the "Periods to Collect" parameter is blank, which assumes overdue AR is collected immediately. To spread collections across future periods (a more realistic assumption for large overdue balances), enter the number of periods you expect it will take - for example, "3" to spread overdue collections evenly across 3 months.

Q: My project schedule changed. When will the forecast reflect the update?

A: As soon as the project schedule is updated in Q360 and you refresh the dashboard. The forecast always uses the latest project data available at the time it runs.

Q: Should I include sales opportunities in the forecast?

A: It depends on your purpose. For conservative cash planning, leave opportunities excluded (the default). For strategic planning and capacity discussions, enabling opportunities with a high probability threshold (70% or above) helps leadership anticipate the impact of expected new work. Avoid including low-probability opportunities - they make the forecast more optimistic than reality.

Q: The forecast changes every time I look at it. Is that normal?

A: Yes. The forecast recalculates with current data each time the dashboard loads. As invoices are paid, projects progress, and expenses are posted, the projection naturally evolves. This is by design - you are always seeing the most current projection. If you need to compare forecasts over time, take a screenshot or export the summary grid at regular intervals (for example, at each monthly financial review).

Q: Can I view the forecast by week instead of by month?

A: Yes. Change the Time Unit filter from Month to Week. Note that weekly projections convert monthly overhead estimates to weekly approximations, so the weekly overhead numbers may not precisely match your actual weekly spending patterns.

Q: What happens if project managers have not updated their schedules recently?

A: The forecast will project revenue and costs based on stale schedule dates, producing an inaccurate projection. Before major planning meetings, project managers should update their project schedules and billing milestones. This is the single most important data preparation step for making the Cash Forecast reliable.

Q: The chart shows a large spike in one period. What does that mean?

A: Check the Cash Flow Sources bar chart and the summary grid for that period. A large spike usually means a major project billing milestone, a large AR collection, or a significant vendor payment is expected. Verify that the underlying data (project schedule, invoice due date, or purchase order) is accurate.

Related Dashboards

- **Executive Dashboard** - Provides the current-state complement to this forward-looking projection. The Executive Dashboard shows where the business stands now; the Cash Forecast shows where it is heading.
- **Cash Position** - Review your actual bank balances and recent cash flow patterns. Use it to validate the starting bank balance in the forecast and to understand what has been driving recent cash movements.
- **Accounts Receivable** - Investigate the aging and composition of your receivables when the forecast shows concern about collection timing.
- **Revenue Dashboard** - Analyze actual revenue by source and period when you need to ground the forecast's revenue assumptions against recent performance.
- **One Dashboard** - Provides a broader profitability forecast including revenue projections and break-even analysis that complements the cash-focused view here.

Revenue Dashboard

Path: Dashboards > ACCOUNTING > Revenue Dashboard

Roles: CFOs, controllers, finance managers, branch managers, department heads, and anyone responsible for monitoring revenue performance, profitability, and business mix.

Permission: Users must have access to the Dashboards menu in Q360. If the Revenue Dashboard does not appear in your menu, contact your Q360 administrator to request access.

Purpose

The Revenue Dashboard is the profit-and-loss companion in dashboard form. It shows how much revenue your organization is recognizing, what it costs to generate that revenue, and where the resulting gross profit (or loss) is concentrated. It answers questions like:

- How much revenue have we recognized this month, last month, and fiscal year-to-date?
- How does revenue compare to expenses across our branches and departments?
- Which parts of the organization are most profitable?
- What is our revenue mix - how much comes from projects, service calls, service contracts, and other sources?
- How consistent is our revenue and profitability over the past 12 months?

In Q360's accrual accounting model, revenue is recognized when earned - not when cash is received. This dashboard shows earned revenue from your general ledger, giving you an accurate picture of business performance regardless of when customers actually pay.

Data Included

This dashboard draws from your general ledger journal entries, specifically entries classified as revenue (income-type accounts) and expenses (expense-type accounts). It includes:

- All revenue recognized through projects, service calls, service contracts, and other income sources
- All expenses recorded against those revenue streams
- A calculated gross profit (revenue minus expenses) for each organizational unit and time period

The following are **not** included:

- Accounts receivable or invoiced amounts (this dashboard shows recognized revenue, not amounts billed or owed - for that, see the Accounts Receivable dashboard)
- Balance sheet items such as assets, liabilities, and equity
- Cost of goods sold as a separate line item - the expense figure here is a simplified total of all expense-type general ledger entries, which may not match traditional gross profit definitions in your audited financial statements

Dashboard Filters

Filter	Behavior	Default
Company	Narrows to a specific company (legal entity)	All companies
Branch	Narrows to a specific branch	All branches
Department	Narrows to a specific department	All departments
Date Range	Controls the time period for the branch and department charts	Calendar year-to-date

Note: *The three revenue gauges (MTD, Last Month, and Fiscal YTD) always display current-period values regardless of the date range you select on the charts. This ensures you always see your most recent performance snapshot at a glance.*

Dashboard Widgets

This dashboard contains seven widgets: three revenue gauges on the left, two organizational breakdown charts, a 12-month trend chart, and a revenue source pie chart.

Widget: Revenue MTD

Description: A large gauge displaying the total revenue recognized in the current calendar month (from the 1st through today).

Data Source: All income-type general ledger entries posted in the current month. In accrual accounting, this includes revenue recognized from project completion milestones, service call closures, service contract amortization, and any other income entries - regardless of whether the corresponding invoice has been paid.

Interpreting Widget: The color coding provides a quick performance indicator:

- **Red:** Revenue below $3,000,000
- **Yellow:** Revenue between $3,000,000 and $6,000,000
- **Green:** Revenue above $6,000,000

These thresholds are configured by your Q360 administrator. If your organization's revenue is significantly above or below these ranges, ask your Q360 administrator to adjust the thresholds for a more meaningful visual.

Widget Filtering: This gauge always reflects the current calendar month. It responds to Company filter changes but is not affected by date range selections on the chart widgets.

Drilldown: No drilldown. Informational only.

Data Quality Note: Revenue can appear as a negative number if reversals or credits have been posted in the current month. This is normal accounting behavior and reflects the net revenue for the period.

Widget: Revenue Last Month

Description: A gauge showing the total revenue recognized in the previous calendar month - a complete, closed period.

Data Source: All income-type general ledger entries from the prior month, using the same criteria as the MTD gauge.

Interpreting Widget: Use this as your most recent full-month benchmark. The same color thresholds apply. Compare MTD against this gauge (adjusting for elapsed days) to assess whether the current month is tracking ahead or behind.

Widget Filtering: Always reflects the previous calendar month. Responds to Company filter but not date range selections.

Drilldown: No drilldown. Informational only.

Widget: Revenue Fiscal YTD

Description: A gauge showing the cumulative revenue recognized from the start of your fiscal year through today.

Data Source: All income-type general ledger entries from the first day of your fiscal year to today. The fiscal year start date is determined by your organization's fiscal calendar configuration in Q360 - this may or may not align with the calendar year.

Interpreting Widget: This is your year-to-date performance indicator. Compare it against your annual budget or forecast to assess whether revenue is on track. The same color thresholds apply.

Widget Filtering: Uses your configured fiscal calendar. Responds to Company filter but not date range selections.

Drilldown: No drilldown. Informational only.

Data Quality Note: If you are unsure when your fiscal year begins, check with your finance team. Organizations with non-standard fiscal years (for example, July 1 through June 30) will see this gauge reflect that custom period, not the calendar year.

Widget: Revenue / Expense By Branch

Description: A stacked bar chart with one group of bars per branch. Each group shows three measures: Revenue (teal), Expense (dark brown), and Gross Profit (red).

Data Source: All general ledger journal entries within the selected date range, classified as either income (revenue) or expense, and grouped by the branch coded on each entry.

Interpreting Widget: Taller revenue bars indicate higher-revenue branches. Compare the revenue bar to the expense bar for each branch - the difference is the gross profit. Branches where the expense bar nearly matches or exceeds the revenue bar have thin or negative margins and may require attention.

Widget Filtering: This is the master filter widget. When you change Company, Branch, Department, Type, or Date Range here, those changes propagate to the By Department chart, the 12-month trend, and the Revenue By Source pie chart.

Drilldown: Click on a branch to filter the other charts to show only that branch's data.

Data Quality Note: Journal entries that lack proper branch coding appear grouped as "Other." If the "Other" bar is unexpectedly large, your accounting team should review whether entries are being coded to the correct branch.

Widget: Revenue / Expense By Department

Description: A stacked bar chart with the same structure as By Branch, but grouped by department instead.

Data Source: The same general ledger data, grouped by department rather than branch.

Interpreting Widget: Use this to compare profitability across departments. Departments with high revenue relative to expenses are your profit centers. Departments with thin or negative margins may need cost management attention or may be cost centers by design (such as administration or HR).

Widget Filtering: Linked to the By Branch widget - filters you set there apply here automatically.

Drilldown: Click on a department to filter other widgets to that department's data.

Data Quality Note: As with branches, entries without department coding appear as "Other."

Widget: Revenue / Expense - Last 12 Months

Description: A stacked bar chart showing Revenue, Expense, and Gross Profit for each of the last 12 calendar months.

Data Source: General ledger income and expense entries, grouped by month, over a rolling 12-month window.

Interpreting Widget: This chart reveals seasonal patterns, growth trends, and profitability consistency. An upward revenue trend with stable expenses indicates improving margins. Months where expenses spike may reflect one-time costs, seasonal activity, or billing irregularities.

Widget Filtering: This chart always shows the most recent 12 months regardless of the date range selected on the By Branch widget. Company, Branch, and Department filter selections from the By Branch widget are applied.

Drilldown: Hover over bars to see exact values for any month.

Data Quality Note: The 12-month window is rolling - on the first day of each new month, the oldest month drops off and the newest month is added.

Widget: Revenue By Source (Top 5)

Description: A pie chart showing the distribution of revenue across up to five source categories: Project, Call, Service Contract, and Other.

Data Source: Revenue entries are classified by their source: revenue linked to a project is classified as "Project," revenue linked to a service call (without a project) is classified as "Call," revenue linked to a service contract is classified as "Service Contract," and everything else falls into "Other."

Interpreting Widget: The slice sizes show your revenue mix. A business heavily dependent on project revenue will see a dominant Project slice. A business with strong recurring revenue will see a large Service Contract slice. Diversified revenue across multiple sources generally indicates a more resilient business.

Widget Filtering: Linked to the By Branch widget - Company, Branch, Department, Type, and Date Range filters apply.

Drilldown: Click a slice to see the exact revenue amount and percentage for that source.

Data Quality Note: The chart shows only the top 5 revenue sources by total amount. If your organization has additional smaller sources, they are not shown in the pie chart but are included in the underlying data. Additionally, journal entries that are not clearly linked to a project, service call, or service contract default to "Other."

Widgets Relationship

The three gauges at the top answer the immediate question: "How are we doing right now?" - month-to-date, compared to last month, and year-to-date. These always reflect the current period regardless of your filter selections, giving you a constant performance anchor.

The By Branch and By Department charts break down that performance by organizational unit. The By Branch chart is the master filter - adjusting filters there cascades changes to the other charts. This lets you drill from the big picture ("How is the whole company doing?") to the specific ("How is the Engineering department at the Dallas branch performing?").

The 12-month trend chart puts current performance in historical context. It always shows a rolling 12-month window so you can spot seasonal patterns, growth trends, and anomalies.

The Revenue By Source pie chart reveals your business mix, helping leadership assess revenue diversity and stability.

Data Freshness

Revenue and expense data updates as new journal entries are posted in Q360. The gauges and charts reflect the most recent general ledger data available at the time you load the dashboard.

Frequently Asked Questions

Q: Why do the gauge values stay the same when I change the date range on the charts?

A: The three revenue gauges (MTD, Last Month, Fiscal YTD) are designed to always show current performance. They intentionally ignore date range selections so you always have a quick reference point for today's numbers. To analyze revenue for a specific past period, use the By Branch or Last 12 Months charts with an adjusted date range.

Q: The Gross Profit shown on this dashboard does not match our financial statements. Why?

A: The gross profit calculation here is simplified: Revenue minus Expense from the general ledger. It does not distinguish between cost of goods sold, operating expenses, or overhead in the way a formal income statement does. It also does not account for accruals, deferrals, or balance sheet items. Use this metric for high-level trend analysis and branch/department comparisons, but rely on your audited financial statements for precise profitability reporting.

Q: Some entries appear as "Other" for branch or department. What does that mean?

A: General ledger entries that lack proper branch or department coding are grouped as "Other." If this category is unexpectedly large, it suggests entries are being posted without proper organizational coding. Work with your accounting team to ensure all revenue and expense entries include the correct branch and department assignments.

Q: The Revenue By Source pie chart shows only a few sources. Where are the rest?

A: The pie chart displays the top 5 revenue sources by amount. If you have additional smaller sources, they are not shown on the chart but are included in your total revenue. To see all sources, examine the detailed data behind the chart or request a custom report from your Q360 administrator.

Q: Can revenue be negative?

A: Yes. Revenue reversals, credits, or corrections posted to the general ledger reduce net revenue. If reversals exceed new revenue in a period, the net revenue for that period will appear negative. This is normal accounting behavior.

Q: What is the difference between the Revenue Dashboard and the Accounts Receivable dashboard?

A: The Revenue Dashboard shows earned revenue - income recognized in your general ledger based on accrual accounting rules. The Accounts Receivable dashboard shows invoiced and unpaid amounts - what customers owe you. Revenue can be recognized before an invoice is sent (for example, through percentage-of-completion on projects), and an invoice can be outstanding long after revenue is recognized. The two dashboards show different sides of the same coin.

Q: How does fiscal year-to-date differ from calendar year-to-date?

A: Fiscal YTD uses your organization's configured fiscal year, which may not start on January 1. For example, if your fiscal year runs July 1 through June 30, the Fiscal YTD gauge on March 15 would show revenue from July 1 through March 15. Calendar YTD would show January 1 through March 15. The Revenue Dashboard uses Fiscal YTD for its gauge.

Related Dashboards

- **Executive Dashboard** - Provides a high-level summary of revenue alongside cash, sales, projects, service, and HR metrics for a complete business overview.
- **Accounts Receivable** - Shows what customers owe and how quickly they are paying - the cash collection side of the revenue story.
- **Cash Position** - Monitor your actual cash and bank balances alongside the revenue picture to understand the conversion of revenue to cash.
- **Cash Forecast** - Project future cash flows using revenue trends and collection assumptions from this dashboard.
- **Time Billing Summary** - Understand how labor hours - the cost driver behind much of your revenue - are being allocated across the business.

Time Billing Summary Dashboard

Path: Dashboards > TIME BILLING > Time Billing Summary

Roles: Operations managers, project managers, department heads, HR leadership, and finance teams - anyone who needs to understand how employee time is being allocated across customers, projects, and internal work.

Permission: Users must have access to the Dashboards menu in Q360. If the Time Billing Summary dashboard does not appear in your menu, contact your Q360 administrator to request access.

Purpose

The Time Billing Summary dashboard shows how your organization's labor hours are being spent. Time billing is the foundation of labor costing in Q360 - when employees log time against projects, service calls, or internal tasks, those hours are eventually multiplied by wages to calculate actual job costs and drive revenue recognition. This dashboard answers questions like:

- How many hours have been billed across the organization, and how are they distributed by customer and work type?
- What proportion of our time goes to billable customer work (projects and calls) versus internal overhead (admin)?
- How is time distributed across branches, departments, and labor categories?
- Are employees entering their time promptly, or are there entry delays that could distort project financials?
- What are the month-to-month trends in time billing by work type?

Timely and accurate time entry is one of the most critical operational disciplines in Q360. Late time entries delay labor cost allocation, distort project profitability calculations, and push revenue recognition into later periods. This dashboard helps leadership monitor that discipline and its patterns across the organization.

Data Included

This dashboard shows all time bills recorded in Q360 within the selected time period - including both posted and unposted time bills. Each time bill is classified into one of five job types:

- **Admin:** Time billed to the employee's own company - internal work such as training, meetings, company administration, and other overhead activities
- **Project:** Time billed to an external customer's project
- **Call:** Time billed to a service call or dispatch for an external customer
- **Presale:** Time billed to a sales opportunity - pre-sales engineering, proposal preparation, or solution design
- **Other:** Time that does not fit the above categories (a catch-all)

The following are **not** included:

- Time that has not been entered into Q360 yet - the dashboard can only show what has been recorded
- Historical adjustments made outside the selected time period

Dashboard Filters

Filter	Behavior	Default
Company	Narrows to employees in a specific company (legal entity)	All companies
Branch	Narrows to employees assigned to a specific branch	All branches
Department	Narrows to employees assigned to a specific department	All departments
Labor Type	Narrows to employees with a specific labor type classification (such as Engineer, Technician, or Administrative)	All labor types
Time Period	Controls the date range for the main widgets	Current month

***Important:** These filters apply to the employee's organizational assignments (their branch, department, and labor type in their employee record), not to the branch or department of the job they worked on. If an employee from the Dallas branch logs time against a project managed out of the Chicago branch, that time appears under Dallas when you filter by branch.*

The two trend widgets (Time Billing Entry Efficiency and Time Billed by Month × Job Type) always display a rolling 12-month window regardless of the Time Period filter selected on the main widgets.

Widgets

This dashboard contains seven widgets. The right side features a summary grid of hours by customer and job type. The upper left holds four charts showing distributions by job type, branch, department, and category. The bottom row shows two 12-month trend charts.

Widget: Time Billed by Customer × Job Type

Description: A summary grid showing total hours grouped by customer name, with columns breaking down each customer's time by job type (Admin, Project, Call, Presale, Other). Totals at the bottom show company-wide hours by job type.

Data Source: Every time bill recorded within the selected time period, grouped by the customer on the time bill and classified by job type.

Interpreting Widget: Each row is a customer. The columns show how many hours were billed to that customer in each job type category. This view tells you which customers consume the most labor and what type of work that labor supports. The grand total at the bottom gives you a company-wide breakdown of time allocation.

Widget Filtering: Responds to all five filters (Company, Branch, Department, Labor Type, Time Period). This widget is also the master filter - clicking a customer row filters all other widgets to show only that customer's data.

Drilldown: Click any customer row to filter the entire dashboard to that customer. Click the reset icon to return to the full view.

Widget: Time Billed by Job Type

Description: A pie chart showing the percentage distribution of total hours across the five job types: Admin, Project, Call, Presale, and Other.

Data Source: Aggregation of all time bills by job type classification within the selected period.

Interpreting Widget: The size of each slice shows what fraction of your total time goes to each category. A large Admin slice may indicate high overhead - employees are spending significant time on internal tasks rather than billable customer work. A large Project slice indicates a project-heavy workload. Use this to monitor the balance between billable and non-billable time.

Widget Filtering: Responds to all five filters and to any customer selected in the grid above.

Drilldown: No drilldown. Informational only.

Widget: Time Billed by Branch

Description: A vertical bar chart showing total hours billed per branch.

Data Source: Time bills grouped by the employee's assigned branch (not the branch of the project or customer).

Interpreting Widget: Each bar represents one branch. Taller bars indicate more time was logged from that branch. Use this to compare labor activity levels across your locations.

Widget Filtering: Responds to all five filters and to any customer selected in the grid.

Drilldown: No drilldown. Informational only.

Data Quality Note: If an employee has no branch assigned in their employee record, their time will not appear in this chart (though it still appears in the customer grid).

Widget: Time Billed by Department

Description: A horizontal bar chart showing total hours billed per department.

Data Source: Time bills grouped by the employee's assigned department.

Interpreting Widget: Each bar represents one department. Longer bars mean more hours logged from that department. Use this to understand labor allocation across functional areas - engineering, project management, administration, service, and so on.

Widget Filtering: Responds to all five filters and to any customer selected in the grid.

Drilldown: No drilldown. Informational only.

Data Quality Note: Employees without a department assignment will not appear in this chart.

Widget: Time Billed by Category

Description: A horizontal bar chart showing total hours billed per time bill category.

Data Source: Time bills grouped by the labor category assigned to each time entry. Categories are configured by your organization and typically represent different labor rate structures or skill levels (such as "Senior Engineer," "Project Manager," or "Standard Labor").

Interpreting Widget: Each bar represents one category. This chart helps you understand how time is distributed across different rate levels or skill types. Organizations with multiple billing rates can use this to assess revenue potential by labor category.

Widget Filtering: Responds to all five filters and to any customer selected in the grid.

Drilldown: No drilldown. Informational only.

Widget: Time Billing Entry Efficiency

Description: A vertical bar chart showing the average number of days between when work was performed and when the time bill was entered into Q360, displayed by month over a rolling 12-month period.

Data Source: For each time bill, the system calculates the difference between the work date and the entry date. These differences are averaged by month to produce one bar per month.

Interpreting Widget: Lower bars are better. A bar at 0 means employees entered their time the same day they performed the work. A bar at 3 means, on average, employees waited 3 days before logging their time. A bar at 7 or higher signals a significant entry discipline problem.

This is one of the most important operational health metrics on any Q360 dashboard. Late time entry directly impacts your financial accuracy:

- Unposted time bills mean labor costs are not allocated to projects, making projects appear more profitable than they actually are.
- Delayed cost allocation postpones revenue recognition on projects using the percentage-of-completion method.
- Stale time data forces accounting to make corrective entries at month-end, creating the kind of financial surprises the operating rhythm is designed to prevent.

The executive operating rhythm identifies weekly time bill posting as the single most critical weekly task across the entire organization.

Widget Filtering: Responds to Company, Branch, Department, and Labor Type filters. The Time Period filter does not affect this chart - it always shows a rolling 12-month window.

Drilldown: No drilldown. Informational only.

Data Quality Note: In rare cases, this metric may show zero (time entered the same day) or even a negative number (if a time bill is backdated during a data correction). Negative values are uncommon and typically indicate manual adjustments.

Widget: Time Billed by Month × Job Type

Description: A multi-line chart with a separate line for each job type (Admin, Project, Call, Presale, Other), showing monthly trends in hours billed over a rolling 12-month period. The lines are curved and filled.

Data Source: Time bills aggregated by month and job type over the trailing 12 months.

Interpreting Widget: Each colored line tracks one job type over time. Rising lines indicate increasing time allocation to that work type; falling lines indicate decreasing allocation. Use this to spot seasonal patterns (do project hours spike in Q4?), operational shifts (is admin time growing while project time shrinks?), or staffing changes (did a new hire increase Call hours?).

Widget Filtering: Responds to Company, Branch, Department, and Labor Type filters. The Time Period filter does not affect this chart - it always shows a rolling 12-month window.

Drilldown: No drilldown. Informational only.

Widgets Relationship

The **Time Billed by Customer × Job Type** grid is the control center of this dashboard. It provides the detailed numbers and serves as the interactive filter - click any customer to refocus the entire dashboard on that customer's time allocation.

The pie chart and four bar charts (Job Type, Branch, Department, Category) provide quick visual snapshots of how time is distributed across different dimensions of your organization.

The two bottom-row trend charts provide historical context. The Entry Efficiency chart monitors the discipline of time entry - the health of the process. The Time Billed by Month × Job Type chart monitors the pattern of time allocation - the health of the workload distribution.

Together, these widgets answer both "How is our time being used?" and "Is the time data being entered accurately and promptly?"

Data Freshness

Time billing data updates as soon as new time bills are entered or modified in Q360. The dashboard reflects the current state of time bill records each time it loads. The 12-month trend charts automatically advance their window as the calendar progresses.

Frequently Asked Questions

Q: Why does all my time show as "Admin"?

A: Admin time is identified by comparing the customer on the time bill to the employee's own company. If employees are entering time bills with your own company as the customer instead of the external customer, all of that time will be classified as Admin. Review the customer field on recent time bills and correct any that should be attributed to external customers.

Q: The filters work on the employee's branch and department, not the project's. Why?

A: This dashboard is designed to show how your people are spending their time, organized by your organizational structure. If a Dallas engineer logs time on a Chicago project, the time appears under Dallas because that is where the labor resource resides. This approach supports workforce planning and utilization analysis by location and team.

Q: Can the Entry Efficiency metric be negative?

A: In rare cases, yes - this happens if a time bill is backdated (the entry date is earlier than the work date) during a data correction. Persistent negative values should be investigated, as they may indicate process issues.

Q: Does the Time Period filter affect the 12-month trend charts?

A: No. The two bottom-row trend charts (Entry Efficiency and Monthly Job Type) always show a rolling 12-month window regardless of the Time Period selected for the main widgets. This gives you a consistent long-term view alongside the current-period detail.

Q: What if an employee has no branch or department assigned?

A: Their time still appears in the Customer × Job Type grid and affects totals, but it will not show in the Branch or Department bar charts. If you need accurate branch or department analysis, ensure all active employees have these assignments configured in their employee records.

Q: How is "Job Type" determined?

A: Job type is assigned automatically based on the time bill's characteristics: if the customer matches the employee's own company, it is Admin. If the time bill is linked to a project (and not a sales opportunity or service call), it is Project. If linked to a service call, it is Call. If linked to a sales opportunity, it is Presale. Everything else is Other.

Q: How often should I review this dashboard?

A: Weekly, as part of the operational review cadence. Pay particular attention to the Entry Efficiency chart - if the average entry delay is creeping up, that is an early warning that time entry discipline is slipping. The executive operating rhythm recommends weekly time bill posting as the most critical recurring task in the organization.

Related Dashboards

- **Employee Utilization** - Shows the percentage of employee time that is billable versus non-billable. Use the Time Billing Summary to see the raw hours, then Employee Utilization to see the efficiency ratios.
- **Time Bill By Employee Summary** - Drills down from the organization-wide view on this dashboard to the individual employee level. Use the Time Billing Summary to understand overall time patterns, then Time Bill By Employee Summary to see how each person in a department is allocating their time between billable and admin work.
- **Project Overview -** Review individual project health, budgets, and labor cost allocation. Accurate time billing feeds directly into project profitability calculations.
- **Executive Dashboard** - Includes high-level workforce and operational metrics. Time billing discipline directly affects the accuracy of project and financial data shown on the Executive Dashboard.
- **Revenue Dashboard** - Revenue recognition depends on timely time billing. Late time entries delay cost allocation and revenue recognition, affecting the numbers shown on the Revenue Dashboard.
- **Cash Forecast** - Labor costs (driven by time billing) are a component of project cost projections in the cash forecast. Accurate and timely time entry improves forecast reliability.

Time Bill By Employee Summary Dashboard

Path: Dashboards > Time Bill By Employee Summary

Roles: Department heads, operations managers, team leads, and anyone who needs to see how individual employees are allocating their time between billable customer work and internal administrative tasks.

Permission: Users must have access to the Dashboards menu in Q360. If the Time Bill By Employee Summary dashboard does not appear in your menu, contact your Q360 administrator to request access.

Purpose

The Time Bill By Employee Summary dashboard breaks down time billing data to the individual employee level by department. While the Time Billing Summary dashboard shows organization-wide patterns by customer, branch, and job type, this dashboard answers a different set of questions:

- How many total hours has each employee billed during the selected period?
- How many distinct projects or service calls did each employee work on?
- What percentage of each employee's time is going to billable customer work versus internal administration?
- Which employees have the highest (or lowest) ratio of billable to admin time?

This is the dashboard you turn to when you need to understand individual workload and productivity. It is particularly useful during department-level reviews, resource allocation discussions, and when investigating why a team's overall utilization numbers look higher or lower than expected - because it lets you see exactly which employees are driving the trend.

Data Included

This dashboard shows all time bills recorded in Q360 within the selected date range. The data is organized by employee and grouped by the projects or calls they worked on. Each time bill contributes to three measures:

- **Total Time Billed** - the total hours recorded on the time bill
- **Admin Time** - hours billed to the employee's own company (internal work such as meetings, training, or company administration)
- **Billable Time** - hours billed to an external customer's project, service call, or other billable work

The following are **not** included:

- Time that has not been entered into Q360 - the dashboard can only show what has been recorded
- Time entries outside the selected date range

Dashboard Filters

Filter	Behavior	Default
Department	Narrows to employees assigned to a specific department. Supports selecting multiple departments at once.	All departments
Start Date	Sets the beginning of the date range for time bills shown	Current fiscal quarter start
End Date	Sets the end of the date range for time bills shown	Last of month

Dashboard Widgets

This dashboard contains three widgets. The top of the screen shows a full-width bar chart of total hours by employee. The bottom half is split between a count of projects and calls on the left and a percentage breakdown of admin versus billable time on the right.

Widget: Total Hours by Employee

Description: A vertical bar chart spanning the full width of the dashboard. Each bar represents one employee, and the bar height shows their total hours billed during the selected period.

Data Source: The chart sums all time bill hours for each employee within the selected date range. Every time bill the employee entered - whether for a project, a service call, or internal administration - contributes to their bar.

Interpreting Widget: Taller bars indicate employees who logged more total hours. Use this chart to quickly compare workload across a team. If one employee's bar is significantly taller than their peers, they may be carrying a disproportionate share of the workload. If a bar is unusually short, the employee may have been on leave, recently hired, or not entering their time promptly.

Widget Filtering: Responds to all three filters (Department, Start Date, End Date).

Drilldown: No drilldown. Informational only.

Data Quality Note: If an employee is not entering time bills, they will not appear on this chart at all. A missing employee does not necessarily mean they were inactive - it may mean their time entries are overdue. Cross-reference with the Time Billing Summary dashboard's Entry Efficiency chart if you suspect late entries.

Projects and Calls per Employee

Description: A vertical bar chart on the lower-left portion of the dashboard. Each bar represents one employee, and the bar height shows the number of time bill entries they recorded during the selected period.

Data Source: The chart counts the number of individual time bill records for each employee. Each time bill entry counts once, so an employee who logged five separate time entries against the same project would show a count of five.

Interpreting Widget: Higher bars indicate employees who are spreading their time across many entries - which may reflect a diverse workload across multiple customers or projects. Lower bars may indicate employees who are focused on fewer, larger engagements. Compare this chart with the Total Hours chart above: an employee with many hours but few entries is likely focused on a small number of large projects, while an employee with many entries but fewer total hours may be handling a high volume of smaller tasks or service calls.

Widget Filtering: Responds to all three filters (Department, Start Date, End Date). This widget is also synchronized with the Admin vs. Billable Time chart - when you interact with that chart, this one updates to reflect the same context.

Drilldown: No drilldown. Informational only.

Widget: Admin vs. Billable Time (%)

Description: A horizontal stacked bar chart on the lower-right portion of the dashboard. Each bar represents one employee, and the bar is divided into two colored segments: a red segment showing the percentage of the employee's total time classified as Admin (internal) time, and a green segment showing the percentage classified as Billable (customer) time. The bars always total 100%, showing the proportional split for each employee.

Data Source: For each employee, the chart calculates Admin Time as a percentage of Total Time Billed, and Billable Time as a percentage of Total Time Billed. These two percentages together account for the employee's entire time allocation during the selected period.

Interpreting Widget: Employees with mostly green bars are spending the majority of their time on billable customer work - projects, service calls, or other external engagements. Employees with large red segments are spending more of their time on internal administration. Neither pattern is inherently good or bad - it depends on the employee's role:

- A field technician or project engineer with a large red (admin) segment may indicate an issue: too much time in meetings, training, or overhead activities instead of billable work.
- An office administrator, HR manager, or finance team member would naturally show a large red segment because their role is internal by definition.
- A team lead or department manager typically shows a mix - some billable project work and some administrative oversight.

Use this chart to identify employees whose admin-to-billable ratio looks unusual for their role, and investigate further if needed.

Widget Filtering: Responds to all three filters (Department, Start Date, End Date). This widget is the master widget on the lower portion of the dashboard - the Projects and Calls per Employee chart is synchronized to it.

Drilldown: No drilldown. Informational only.

Data Quality Note: If an employee has logged only admin time (and zero billable time), their bar will be entirely red. Conversely, if they logged only billable time, their bar will be entirely green. If an employee appears to have no billable time despite working on customer projects, verify that the time bills are being entered with the correct customer (not the employee's own company, which would classify the time as Admin).

Widgets Relationship

The three widgets on this dashboard provide complementary views of the same employee-level time data:

- **Total Hours by Employee** (top) gives you the volume picture - who logged the most hours overall.
- **Projects and Calls per Employee** (bottom left) gives you the activity picture - who is working across the most entries.
- **Admin vs. Billable Time** (bottom right) gives you the efficiency picture - what proportion of each employee's time is going to revenue-generating work.

Together, they let you quickly profile an employee's time allocation. For example, if you see an employee with high total hours, many project entries, but a large red (admin) segment, that employee is logging significant time but much of it is internal - which may warrant a conversation about rebalancing their workload toward billable activities.

The two bottom widgets are synchronized. When you interact with the Admin vs. Billable Time chart, the Projects and Calls chart updates to reflect the same grouping context.

Data Freshness

This dashboard pulls data each time it loads or is refreshed. It reflects the current state of time bill records in Q360. If an employee enters or corrects a time bill, those changes will appear on this dashboard the next time it is refreshed.

Frequently Asked Questions

Q: How is this dashboard different from the Time Billing Summary?

A: The Time Billing Summary shows time data organized by customer, job type, branch, department, and category - it answers "how is our organization's time being used?" The Time Bill By Employee Summary drills down to the individual employee level within a department - it answers "how is each person spending their time?" Use the Time Billing Summary for the big picture, then come here for the employee-level detail.

Q: Why does an employee show 100% admin time when I know they work on customer projects?

A: The most common cause is that the employee is entering time bills with their own company as the customer instead of the external customer. When the customer on the time bill matches the employee's own company, Q360 classifies that time as Admin. Review the employee's recent time entries and verify the customer field is set correctly.

Q: An employee I expected to see is missing from all three charts. Why?

A: The employee has no time bills recorded within the selected date range. This could mean they were on leave, recently hired and haven't started entering time, or they are behind on their time entries. Check with the employee or their manager, and review the Time Billing Summary's Entry Efficiency chart for signs of delayed time entry.

Q: Can I see the detailed time entries behind an employee's bar?

A: The charts on this dashboard are display-only visualizations - they do not drill down to individual time bill records. To see the underlying detail, use the Time Billing Summary dashboard's customer grid, which lists time by customer and job type, or run a detailed time bill report filtered to the specific employee.

Q: What does the "Count of Projects/Calls" actually count?

A: It counts the number of individual time bill entries for each employee, not the number of distinct projects. If an employee logged time against the same project on five different days, that counts as five entries. This gives you a measure of how active the employee was in recording time, not how many unique projects they worked on.

Q: Does the Department filter match the employee's department or the project's department?

A: The employee's department. If an engineer in the Network department logs time on a project managed by the Service department, that time appears under Network when you filter by department. This is consistent with how the Time Billing Summary and Employee Utilization dashboards handle department filtering.

Q: Can I compare departments side by side?

A: Yes. The Department filter supports selecting multiple departments at once. Select the departments you want to compare, and all three charts will show employees from those departments together, allowing you to compare across teams.

Related Dashboards

- **Time Billing Summary** - Shows the organization-wide view of time billing: hours by customer, job type, branch, department, and category. Start there for the big picture, then use Time Bill By Employee Summary for the employee-level breakdown within a department.
- **Employee Utilization** - Shows utilization rates (the percentage of available time that is billable) as ratios and trends. While this dashboard shows the raw percentage split between admin and billable time, Employee Utilization provides the efficiency metric that accounts for expected capacity.
- **Project Overview** - Shows project-level health, budgets, and cost status. Employee time billing feeds directly into project costs. If project costs are running high, use this dashboard to identify which employees are driving the labor hours.
- **Executive Dashboard** - Includes high-level workforce and operational summary metrics. Time billing discipline directly affects the accuracy of project and financial data shown there.

Sales Dashboards

These dashboards support sales representatives, sales managers, and leadership in tracking pipeline health, opportunity progress, booking trends, quota attainment, and funnel movement. Together, they cover the full lifecycle of a sale in Q360 - from the moment an opportunity enters the pipeline, through quoting and funnel progression, to the point where a quote converts into a booked order.

The Sales Overview workflow in Q360 ties these dashboards together into a unified sales management process. From the Sales Overview, managers can jump directly to the Sales Forecast, the Sales Funnel, current-month activities, current-month bookings, and the Sales Dashboard itself. The dashboards documented here provide the detailed views that support that workflow. If you are a sales manager establishing a weekly or monthly review cadence, start with the Sales Dashboard for individual rep performance, use Sales Opportunities for pipeline-wide analysis, review Sales Booking for conversion results, and use the Sales Score Card to benchmark reps against each other and their targets.

The executive operating rhythm depends on accurate, timely sales data. Pipeline value flows from these dashboards into the Executive Dashboard's sales summary and the One Dashboard's forward-looking projections. Bookings recorded here feed directly into backlog and revenue forecasts. When sales teams maintain their opportunities, update funnel positions, and convert quotes promptly, every downstream dashboard benefits.

Sales Dashboard

Path: Dashboards > SALES > Sales Dashboard

Roles: Individual Sales Representatives, Sales Managers, and anyone tracking a specific salesperson's tasks, opportunities, pipeline, and quota attainment.

Permission: Users must have SALESAUTO/View access. If this dashboard does not appear in your menu, contact your Q360 administrator to request the appropriate permission.

Purpose

The Sales Dashboard is the individual salesperson's home base in Q360. It brings together everything a sales rep needs to manage their day and track their performance on a single screen. It answers questions like:

- What tasks, appointments, and follow-ups do I need to handle today and in the coming weeks?
- What are my top upcoming opportunities, and when are they expected to close?
- How is my pipeline distributed across funnel stages?
- Am I on track to hit my monthly, quarterly, and yearly sales goals?
- How do my sales this year compare to prior years?

Unlike the Sales Opportunities dashboard (which shows pipeline across the entire organization), this dashboard is focused on one person at a time. A manager can switch between team members using the User dropdown to review each rep's performance individually.

Data Included

This dashboard combines data from five different areas of Q360:

- **Tasks:** Active project tasks, appointments, quotes, opportunities, activities, service calls, and funnel tasks assigned to the selected user, looking forward up to 30 days by default.
- **Top Opportunities:** The selected user's active (open) sales opportunities, bucketed into 30-day, 60-day, and 90-day close date windows. An opportunity is considered "active" if it has not been marked as won or lost. The full opportunity value is shown - values are not split if an opportunity is shared between multiple reps.
- **Opportunity Funnel:** The total dollar value of the selected user's active opportunities, grouped by funnel stage (as defined by your organization's funnel definition). This shows where in the sales process the rep's deals are concentrated.
- **Sales Goals:** The selected user's actual converted quote revenue compared against their commission quota for the current fiscal period. Three separate gauges show monthly, quarterly, and yearly attainment.
- **Monthly Sales History:** A multi-year bar chart showing the selected user's converted quote revenue by month, allowing year-over-year comparison for up to five years.

The following are **not** included:

- Opportunities where the selected user is not listed as a sales representative on the record
- Quotes that have not been converted to orders (unconverted quotes do not count toward sales goals)
- Cancelled orders - even if a quote was converted, if the resulting order was subsequently cancelled, it does not count toward sales goals
- Historical task data beyond the configured look-ahead window (default 30 days)

Dashboard Filters

The primary filter on this dashboard is the **User** dropdown at the top of the task list. This dropdown shows active users that you have permission to view - either because you have the "View All Tasks" permission, or because the user reports to you in the organizational hierarchy.

When you select a different user from this dropdown, every widget on the dashboard updates to show that person's data. This is the single control point for the entire screen.

Filter	Behavior	Default
User	Selects which salesperson's data appears across all widgets	Current User ID

Filters Sync

The User Tasks widget at the top of the dashboard is the driver. When you change the user selection, Q360 automatically passes that user's identity to every other widget - the Top Opportunities list, the Opportunity Funnel chart, the three sales goal gauges, and the Monthly Sales chart. You do not need to change the user on each widget separately.

Widgets

This dashboard contains seven widgets: a task list, an opportunity list, a funnel chart, three sales goal gauges, and a monthly sales history chart.

Widget: User Tasks

Description: A table listing the selected user's active tasks across all Q360 modules. Each row shows the task type, description, dates, status, site information, company, and assigned contact.

Data Source: This table pulls from multiple areas of Q360 simultaneously - project schedules, quote records, opportunity records, activity logs, and service calls among others. Only tasks that fall within the look-ahead window (default: today plus 30 days) and match the enabled task types are shown.

Interpreting Widget: Scan the list for upcoming due dates and prioritize accordingly.

Widget Filtering: The User dropdown at the top of this widget controls which user's tasks appear. By default, it shows your own tasks. Managers can select any direct report or (with the appropriate permission) any active user in the system. When you change the user selection here, all other widgets on the dashboard update automatically.

Drilldown: Click the item icon in the first column to open the full record for that task - whether it is a project task, appointment, quote, opportunity, or service call. This takes you directly to the relevant form in Q360.

Widget: Top Opportunities

Description: A table listing the selected user's active sales opportunities, sorted by value (highest first) and grouped into three time windows: opportunities expected to close within 30 days, within 60 days, and within 90 days.

Data Source: This table shows opportunities from the sales pipeline where the selected user is listed as a sales representative (primary, secondary, or tertiary). Only active opportunities are included - those that have not been marked as won or lost.

Interpreting Widget: The grouping by time window helps you focus on what is most urgent. Opportunities in the 30-day window are your most immediate priorities. The Company column shows the customer, the Title describes the deal, the Close Date shows the expected conversion date, and the Value shows the deal size.

Widget Filtering: This widget updates automatically when you change the user in the User Tasks dropdown. It shows only the selected user's opportunities.

Drilldown: Click a company name to open the customer record. Click an opportunity title to open the opportunity record directly. Both require the appropriate view permissions.

Data Quality Note: If an opportunity is assigned to multiple sales reps (using the secondary and tertiary rep fields), it will appear on each rep's dashboard at its full value. This is by design - each rep sees the deals they are involved in - but be aware that summing pipeline value across multiple reps may double-count shared opportunities.

Widget: Opportunity Value by Funnel Stage

Description: A horizontal bar chart showing the total dollar value of the selected user's active opportunities, grouped by funnel stage. Each bar represents one stage in your organization's sales funnel (for example, Qualification, Proposal, Negotiation), and the bar length represents the total opportunity value at that stage.

Data Source: This chart reads each opportunity's funnel position and maps it to the stage names defined in your organization's funnel definition. Only active opportunities assigned to the selected user are included. The values shown are the raw opportunity values in their original currency.

Interpreting Widget: Longer bars indicate more pipeline value concentrated at that stage. A healthy pipeline typically shows value distributed across multiple stages, with value flowing from earlier stages (top) to later stages (bottom). If most of your value is stuck in early stages with little in later stages, deals may not be progressing. If most value is in the final stage, you may have a near-term closing surge but a weak future pipeline.

Widget Filtering: Updates automatically when you change the user in the User Tasks dropdown. A funnel definition dropdown may appear if your organization has multiple funnel definitions configured.

Drilldown: The chart is primarily a visual summary.

Data Quality Note: If an opportunity has no funnel position assigned, or if its position exceeds the number of phases defined in the funnel definition, that opportunity's value will not appear in any bar. If the chart total seems lower than expected, check whether any opportunities are missing funnel assignments.

Widget: Monthly Sales Goal

Description: A radial gauge (dial) showing the selected user's actual converted sales revenue for the current fiscal month compared against their monthly commission quota. The gauge needle shows the current sales amount, and the scale represents the quota target.

Data Source: The sales amount is the sum of all converted quote amounts (the order total, not the gross profit) for the selected user within the current fiscal month. The quota comes from the user's commission quota record for the same period. "Converted" means the quote has been turned into an order and the order has not been cancelled.

Interpreting Widget: The gauge uses three color zones to indicate performance:

- **Red** (lower third of the scale) - significantly below target
- **Yellow** (middle third) - approaching target
- **Green** (upper third) - at or above target

The scale maximum is automatically set to 150% of the quota, so the gauge can show over-performance. If the needle is in the green zone, the rep is on track or ahead for the month.

Widget Filtering: Updates automatically when you change the user in the User Tasks dropdown. The time period is determined by the current fiscal calendar - it uses the fiscal month, not the calendar month, so organizations with non-standard fiscal periods will see the appropriate dates.

Drilldown: No drilldown. Informational only. It does not open a drill-down report.

Data Quality Note: If no commission quota has been set up for the selected user for the current period, the gauge will display with a zero or minimal scale, showing the rep's sales in the red zone. This does not necessarily mean poor performance - it may simply mean the quota record needs to be created. If you see this, ask your Q360 administrator to verify that commission quotas are configured for the current fiscal period.

Widget: Quarterly Sales Goal

Description: A radial gauge showing the selected user's actual converted sales revenue for the current fiscal quarter compared against their quarterly commission quota. The layout and color coding are identical to the Monthly Sales Goal gauge, but the time window covers the full quarter.

Data Source: Same data source as the Monthly Sales Goal, but the date range covers the entire current fiscal quarter. Commission quotas whose start and end dates fall entirely within the quarter are summed to produce the target.

Interpreting Widget: The same red/yellow/green color zones apply. Because the quarter covers a longer period, this gauge typically shows larger absolute numbers. Use it to assess whether the rep's monthly pace is sustainable across the quarter.

Widget Filtering: Updates automatically with the user selection. Uses the fiscal quarter from your organization's fiscal calendar.

Drilldown: No drilldown. Informational only.

Widget: Yearly Sales Goal

Description: A radial gauge showing the selected user's actual converted sales revenue for the current fiscal year compared against their yearly commission quota.

Data Source: Same data source as the other goal gauges, but the date range covers the full fiscal year. All commission quotas within the year are summed.

Interpreting Widget: This is the big-picture view of the rep's annual performance. The same red/yellow/green color zones apply. A rep in the green zone on the yearly gauge is tracking well overall, even if individual months may have varied.

Widget Filtering: Updates automatically with the user selection. Uses the fiscal year from your organization's fiscal calendar.

Drilldown: No drilldown. Informational only.

Data Quality Note (applies to all three goal gauges): Sales goals are measured on the gross order amount - the total dollar value of the converted quote - not on gross profit or net margin. If your organization's commission structure is based on margin rather than revenue, be aware that the gauge reflects revenue attainment, which may differ from margin-based targets.

Widget: Monthly Sales History

Description: A multi-year bar chart showing the selected user's converted sales revenue by month. Each year appears as a separate color series, so you can compare January this year to January last year, and so on, for up to five years of history.

Data Source: This chart sums the total amount from converted quotes (where the order is not cancelled) for the selected user, grouped by month and year. The date range defaults to five years back from the start of the current year through the current month.

Interpreting Widget: Each cluster of bars represents one calendar month, with one bar per year. Taller bars mean more revenue booked that month. Look for seasonal patterns (do certain months consistently outperform?), growth trends (are this year's bars generally taller than last year's?), and anomalies (a sudden spike or drop in a particular month).

Widget Filtering: Updates automatically when you change the user in the User Tasks dropdown.

Drilldown: No drilldown. Informational only.

Widgets Relationship

The Sales Dashboard uses a hub-and-spoke model. The User Tasks widget is the hub - it contains the User dropdown that controls everything else on the screen. When you select a user:

1. The **Task List** shows that user's upcoming tasks and follow-ups.
2. The **Top Opportunities** table shows their active deals, bucketed by time to close.
3. The **Opportunity Funnel** chart shows how their pipeline is distributed across sales stages.
4. The three **Sales Goal gauges** show their month, quarter, and year performance against quota.
5. The **Monthly Sales History** chart shows their multi-year sales trend.

A typical workflow for a sales manager: select a rep from the dropdown, scan their task list for overdue or upcoming items, review their top opportunities for the next 30 days, check the funnel chart for pipeline balance, glance at the goal gauges to see if they are on track, and then look at the monthly history to understand the broader pattern. Repeat for each team member.

Data Freshness

This dashboard pulls data each time it loads or is refreshed. Task updates, opportunity changes, quote conversions, and quota adjustments in Q360 will appear the next time you open or refresh the dashboard. Sales goal gauges reflect the current state of converted quotes and commission quota records - there is no delay beyond the page refresh.

Frequently Asked Questions

Q: Why are the sales goal gauges all showing red even though the rep has sales?

A: The most common cause is a missing commission quota record. If no quota has been set up for the rep for the current fiscal period, the gauge scale defaults to a minimal range and shows the rep's sales in the red zone. Ask your Q360 administrator to verify that commission quotas exist for the appropriate time periods.

Q: The Monthly Sales History chart shows zero for several months. Does that mean the rep had no sales?

A: It means no converted quotes with active (non-cancelled) orders were recorded for the selected user in those months. If the rep had sales but they were booked under a different user ID, or if the quotes were not yet converted, they would not appear. Verify that converted quotes have the correct salesperson assigned.

Q: Can an opportunity appear on more than one rep's dashboard?

A: Yes. If an opportunity has multiple sales reps assigned (primary, secondary, or tertiary), it will appear on each rep's Top Opportunities list and in each rep's Opportunity Funnel at its full value. This is intentional - it ensures every involved rep sees the deal - but be aware that it can lead to double-counting if you manually sum pipeline values across reps.

Q: Why does the Top Opportunities table show three groups (30, 60, 90 days)?

A: Opportunities are bucketed by their expected close date relative to today. The 30-day group contains deals expected to close within the next month, the 60-day group contains deals closing in the second month, and the 90-day group contains deals closing in the third month. Each opportunity appears in exactly one group - there is no overlap.

Q: What counts as "sales" in the sales goal gauges?

A: Sales are measured as the total order amount from converted quotes. A quote must be converted to an order, and the order must not be cancelled. The metric is gross revenue (the order total), not gross profit or net margin. Cost and margin are calculated elsewhere but are not used in the goal gauge calculation.

Q: I changed a rep's user ID in Q360 but their old sales still show under the old ID. Why?

A: The sales goal gauges and monthly sales chart look at the salesperson field on converted quotes and orders. If historical records still reference the old user ID, those sales will not appear under the new ID. Historical records would need to be updated to reflect the new ID if you want a consolidated view.

Q: The Opportunity Funnel chart shows less total value than the Top Opportunities table. Why?

A: The two widgets use different grouping logic. The Top Opportunities table shows all active opportunities bucketed by close date. The Opportunity Funnel chart groups by funnel stage. If an opportunity has no funnel position assigned (or an invalid position that exceeds the number of defined phases), it will appear in the Top Opportunities table but not in the funnel chart. Check whether any opportunities are missing funnel stage assignments.

Related Dashboards

- **Sales Opportunities** - Provides an organization-wide view of the active pipeline with KPI summaries, aging analysis, and trend charts. Use the Sales Dashboard for individual rep performance, and Sales Opportunities for the full pipeline picture.
- **Sales Booking** - Shows converted orders (bookings) with revenue, GP, and labor breakdowns. The Sales Dashboard's goal gauges measure quota attainment; Sales Booking provides the detailed booking analysis by branch, sale type, and team.
- **Sales Score Card** - Compares all sales reps against each other on a composite score. Use the Sales Dashboard for deep-diving into one rep, and the Score Card for cross-rep benchmarking.
- **Executive Dashboard** - Includes a high-level sales pipeline summary. The data shown there originates from the same opportunity and booking records visible in these sales dashboards.

Sales Opportunities Dashboard

Path: Dashboards > SALES > Sales Opportunities

Roles: Sales Managers, VPs of Sales, and leadership who need a comprehensive, organization-wide view of the active sales pipeline - its size, composition, health, and trends.

Permission: Dashboards menu plus permission to this dashboard.

Purpose

The Sales Opportunities dashboard is the organization-wide pipeline command center. While the Sales Dashboard focuses on one rep at a time, this dashboard aggregates the entire active pipeline across all reps, branches, and departments. It answers questions like:

- What is the total value of our active sales pipeline right now?
- How much recurring monthly revenue (RMR) is in the pipeline?
- How much has been formally quoted, and what is the gross profit on those quotes?
- How old are our opportunities on average, and how large is the average deal?
- How many active opportunities do we have?
- Where is pipeline value concentrated - by branch, by interest type, by expected close date, by age?
- How many new opportunities have we been adding to the pipeline each month over the past year?

This dashboard is designed for pipeline reviews, sales meetings, and strategic planning sessions where leadership needs to assess overall pipeline health rather than individual rep performance.

Data Included

This dashboard shows **active opportunities only** - those whose status has not been set to Won, Lost, or any other closed-type of Won/Lost code. An opportunity is considered "active" based on its won/lost code in Q360. If no won/lost code has been assigned, the opportunity defaults to active.

For each active opportunity, the dashboard includes:

- The opportunity's total estimated value
- Its recurring monthly revenue (RMR), if applicable
- The total amount quoted against it (from non-closed quotes only - closed quotes are excluded from the quoted totals)
- The gross profit on those quotes
- The opportunity's age (days since it was entered)
- The number of days until its expected close date
- Its branch, department, interest type, and sales rep assignments

The **New Opportunity By Month** chart at the bottom of the dashboard uses a separate 12-month historical window. It shows opportunities entered during the last 12 months regardless of whether they are still active, providing a trailing view of pipeline generation activity.

The following are **not** included:

- Opportunities marked as won or lost (these are filtered out of the active pipeline view)
- Closed quotes - only open or in-progress quotes contribute to the quoted amount and quoted GP totals
- Opportunities without a valid customer record in Q360 (these are excluded from the underlying data)

Dashboard Filters

This dashboard provides a full set of filters for slicing the pipeline data:

Filter	Behavior	Default
Company No.	Narrows to one or more company (legal entity)	All companies
Branch	Narrows to one or more branches	All branches
Department	Narrows to one or more departments	All departments
Sales Group	Narrows to one or more sales groups	All groups
Sales Rep	Narrows to one or more sales representatives (only users with a Sales role appear in the list)	All reps
Interest	Narrows to one or more interest types (the product/service category of the opportunity)	All types

Note: *The Sales Rep filter only lists active users with the Sales job role. If a former rep's opportunities still exist in the pipeline, you would need to reassign those opportunities to an active rep or use the data grid to find them by company name.*

Filters Sync

The **Sales Opp By Company** summary grid is the driver widget on this dashboard. When you interact with any filter, the seven KPI gauges and five of the six charts update together because they all share the same underlying data. The one exception is the New Opportunity By Month chart at the bottom, which uses its own 12-month date window. However, the branch, company, department, sales group, interest type, and sales rep filters do cascade to the New Opportunity By Month chart, so when you filter the main view by (for example) a specific branch, the historical chart also narrows to that branch.

Widgets

This dashboard contains fourteen widgets: a summary grid, seven KPI gauges, and six charts.

Widget: Sales Opp By Company (Summary Grid)

Description: A summary table grouping all active opportunities by customer company name, with the total opportunity value shown for each company.

Data Source: Every active opportunity is grouped by its associated customer company, and the values are summed per company. This gives you a quick view of which customers represent the largest share of your pipeline.

Interpreting Widget: Companies at the top of the list (or with the largest values) represent your biggest pipeline concentrations. A heavily concentrated pipeline - where one or two companies dominate - may indicate risk if those deals fall through.

Widget Filtering: Responds to all dashboard filters (company, branch, department, sales group, sales rep, interest type, date range).

Drilldown: This grid drives the other widgets. When you interact with filters, all synced gauges and charts update.

Widget: Total Pipeline

Description: A single number showing the total dollar value of all active opportunities in the current filtered view.

Data Source: This is the sum of the Value field across all active opportunities that match the current filters.

Interpreting Widget: The number is color-coded: red below $100,000, yellow between $100,000 and $1,000,000, and green above $1,000,000. These thresholds are defaults and may be customized for your organization by your Q360 administrator.

Widget Filtering: Responds to all dashboard filters.

Drilldown: No drilldown. Informational only.

Widget: Total RMR

Description: A single number showing the total Recurring Monthly Revenue (RMR) across all active opportunities. RMR represents ongoing monthly billing for services such as maintenance contracts, hosting fees, and monitoring subscriptions.

Data Source: This is the sum of the RMR field from each active opportunity. Unlike the total pipeline value (which represents one-time deal value), RMR represents repeating monthly revenue that the organization would earn on an ongoing basis if these deals close.

Interpreting Widget: Color-coded red below $50,000, yellow between $50,000 and $500,000, and green above $500,000 (default thresholds). A growing RMR pipeline indicates increasing future recurring revenue potential.

Widget Filtering: Responds to all dashboard filters.

Drilldown: No drilldown. Informational only.

Widget: Total Quoted

Description: A single number showing the total dollar amount that has been formally quoted across all active opportunities. This represents the sum of all non-closed quote amounts.

Data Source: For each active opportunity, Q360 sums the total amount from all associated quotes that have not been closed. Closed quotes are excluded. If an opportunity has multiple open quotes (for example, a base quote and a change order quote), all are included in the total.

Interpreting Widget: Compare this to the Total Pipeline gauge. If Total Quoted is significantly lower than Total Pipeline, it means many opportunities have not yet reached the quoting stage. If Total Quoted is close to or exceeds Total Pipeline, your pipeline is well-progressed (or some opportunities may have been over-quoted relative to their estimated value).

Widget Filtering: Responds to all dashboard filters.

Drilldown: No drilldown. Informational only.

Widget: Total Quoted GP

Description: A single number showing the total gross profit across all non-closed quotes associated with active opportunities.

Data Source: This is the sum of the gross profit (GP) field from all non-closed quotes linked to active opportunities. Gross profit is the difference between the quoted selling price and the estimated cost.

Interpreting Widget: This number tells you the potential margin in your quoted pipeline. Compare it to Total Quoted to get a sense of the overall margin percentage. Color-coded red below $100,000, yellow between $100,000 and $600,000, and green above $600,000 (default thresholds).

Widget Filtering: Responds to all dashboard filters.

Drilldown: No drilldown. Informational only.

Widget: Average Age

Description: A single number showing the average age (in days) of all active opportunities - how long, on average, opportunities have been in the pipeline since they were entered.

Data Source: Each opportunity's age is calculated as the number of days between its entry date and today. The gauge shows the average across all active opportunities in the current filtered view.

Interpreting Widget: The color coding is inverted from other gauges - lower is better: green for 0–30 days, yellow for 30–60 days, and red above 60 days. A high average age indicates the pipeline contains stale opportunities that may need to be re-evaluated, advanced, or closed out. Regularly cleaning up aging opportunities keeps this metric healthy and your pipeline realistic.

Widget Filtering: Responds to all dashboard filters.

Drilldown: No drilldown. Informational only.

Widget: Average Value

Description: A single number showing the average dollar value per active opportunity.

Data Source: This is the arithmetic average of the Value field across all active opportunities in the current filtered view.

Interpreting Widget: Color-coded red below $20,000, yellow between $20,000 and $50,000, and green above $50,000 (default thresholds). Track this over time - a declining average value may indicate smaller deals entering the pipeline, while a rising average may signal a shift toward larger, more strategic opportunities.

Widget Filtering: Responds to all dashboard filters.

Drilldown: No drilldown. Informational only.

Data Quality Note: Opportunities with a zero or missing value are included in the average calculation. If some opportunities have not yet been valued, they will drag the average down. Ensure that sales reps enter estimated values on all opportunities for accurate pipeline metrics.

Widget: Opportunity Count

Description: A single number showing the total count of active opportunities in the current filtered view.

Data Source: This is a count of distinct opportunity records that match the current filters.

Interpreting Widget: Color-coded red below 10, yellow between 10 and 30, and green above 30 (default thresholds). The count, combined with the average value, gives you a quick sense of pipeline breadth. A high count with a low average value suggests many small deals; a low count with a high average value suggests fewer but larger strategic deals.

Widget Filtering: Responds to all dashboard filters.

Drilldown: No drilldown. Informational only.

Widget: Sales Opp By Branch

Description: A horizontal bar chart showing total opportunity value grouped by branch. Each bar represents one branch, and the bar length shows the total pipeline value at that location.

Data Source: Active opportunities are grouped by their assigned branch, and the values are summed per branch.

Interpreting Widget: Longer bars indicate branches with more pipeline value. Use this to compare pipeline distribution across your offices. If one branch has a disproportionately small pipeline relative to its staffing, it may need additional sales support or marketing effort.

Widget Filtering: Responds to all dashboard filters.

Drilldown: Clicking a bar filters the summary grid and other charts to show only opportunities from that branch.

Widget: Sales Opp By Interest

Description: A horizontal bar chart showing total opportunity value grouped by interest type - the product or service category assigned to each opportunity.

Data Source: Active opportunities are grouped by their interest type field, and the values are summed per type.

Interpreting Widget: This chart reveals which products or services are driving your pipeline. A healthy pipeline typically shows value across multiple interest types. If one type dominates, your revenue may be overly dependent on a single product line.

Widget Filtering: Responds to all dashboard filters.

Drilldown: Clicking a bar filters other widgets to show only opportunities of that interest type.

Widget: Opportunity Closing Group

Description: A vertical bar chart showing total opportunity value grouped by how soon the deals are expected to close: Overdue (close date has already passed), 0–30 days, 31–60 days, 61–90 days, or 91+ days.

Data Source: Each opportunity's expected close date is compared to today to calculate the number of days until close. Opportunities are then bucketed into the time groups and their values summed.

Interpreting Widget: The "Overdue" bar is especially important - it represents opportunities whose expected close dates have passed without the deal being closed, won, or lost. A large Overdue bar typically means close dates need to be updated or stale opportunities need to be resolved. The distribution across the other bars shows how much revenue is expected in the near term versus later.

Widget Filtering: Responds to all dashboard filters.

Drilldown: Clicking a bar filters other widgets to show only opportunities in that closing group.

Widget: Opportunity By Age Group

Description: A vertical bar chart showing total opportunity value grouped by how long the opportunities have been in the pipeline: 0–30 days, 31–60 days, 61–90 days, or 91+ days since entry.

Data Source: Each opportunity's age is calculated as the number of days since it was entered into Q360. Opportunities are then bucketed and their values summed.

Interpreting Widget: A pipeline dominated by the 91+ day bucket may contain stale deals that need attention. Ideally, you want a balanced distribution that shows new opportunities regularly entering the pipeline (value in the 0–30 day bucket) while older opportunities are being advanced or closed.

Widget Filtering: Responds to all dashboard filters.

Drilldown: Clicking a bar filters other widgets to show only opportunities in that age group.

Widget: Closing By Month

Description: A vertical bar chart showing total opportunity value grouped by the month in which deals are expected to close (displayed in year-month format).

Data Source: Each opportunity's expected close date is formatted into a year-month value, and opportunity values are summed by month.

Interpreting Widget: This chart serves as a simple pipeline forecast - it shows how much revenue is expected to close in each upcoming month. Months with tall bars represent peak expected closings. Compare this to your capacity and your bookings targets to assess whether the expected close pattern is realistic and achievable.

Widget Filtering: Responds to all dashboard filters.

Drilldown: Clicking a bar filters other widgets to show only opportunities expected to close in that month.

Widget: New Opportunity By Month (Last 12 Months)

Description: A vertical bar chart showing the total value of new opportunities entered into Q360 each month over the past 12 months.

Data Source: This chart uses a separate data query that looks at all opportunities entered within the last 12 months, regardless of whether they are still active. It groups them by the month they were entered and sums their values. This provides a historical view of pipeline generation - how much new business has been flowing into the pipeline over time.

Interpreting Widget: Rising bars over time indicate growing pipeline generation - your sales team is adding more value each month. Declining bars may signal a slowdown in business development activity. Note that this chart shows the current value of each opportunity, not the value at the time it was entered - if an opportunity's value has been updated since entry, the current value is reflected.

Widget Filtering: The branch, company, department, sales group, interest type, and sales rep filters from the main dashboard cascade to this chart. The date range, however, is fixed at the last 12 months and is not affected by the Date Range filter.

Drilldown: No drilldown. Informational only.

Widgets Relationship

The Sales Opp By Company summary grid is the central hub. The seven KPI gauges (Total Pipeline, Total RMR, Total Quoted, Total Quoted GP, Average Age, Average Value, and Opportunity Count) and five of the six charts (By Branch, By Interest, Closing Group, Age Group, and Closing By Month) are all synchronized to this grid. When you apply filters, all of these widgets update together to show the same filtered slice of the pipeline.

The New Opportunity By Month chart operates on its own 12-month data window, but it still inherits the organizational filters (branch, company, department, sales group, interest type, sales rep) from the main grid. This means if you filter the dashboard to a specific branch, the historical chart also narrows to that branch - but it always shows the last 12 months of data regardless of the date range you select for the main view.

A typical workflow for a weekly pipeline review: start by scanning the seven KPI gauges for any red indicators. Check the Average Age - if it is climbing, opportunities are getting stale. Review the Closing Group chart to see how much revenue is expected in the next 30 days. Look at the Age Group chart to assess pipeline freshness. Check the New Opportunity By Month trend to confirm that new business is still flowing in. Then filter by branch or sales group to drill into specific teams.

Data Freshness

This dashboard pulls data each time it loads or is refreshed. Changes to opportunity values, close dates, won/lost codes, and quote amounts in Q360 will appear the next time you refresh the dashboard. There is no scheduled delay - the data reflects the current state of records at the moment of refresh.

Frequently Asked Questions

Q: Why do the Total Pipeline and Total Quoted numbers differ significantly?

A: Total Pipeline represents the estimated value of all active opportunities. Total Quoted represents only the amounts that have been formally quoted (via non-closed quotes linked to those opportunities). Not every opportunity has a quote yet, and some opportunities may be valued higher or lower than their associated quotes. A large gap between the two typically means many deals are still in early stages before quoting.

Q: An opportunity was just closed as "Won" but it still appears on the dashboard. Why?

A: The dashboard shows active opportunities - those whose won/lost code resolves to "Active" or is blank. When an opportunity is marked as Won, its won/lost code should change to a value that the system treats as non-active. If it still appears, the won/lost code may not have been updated correctly, or the code configuration may need review. Ask your Q360 administrator to verify the won/lost code settings.

Q: Can I see lost opportunities on this dashboard?

A: No. This dashboard is designed exclusively for the active pipeline. Lost opportunities are filtered out. If you need to analyze lost deals, use the Sales Forecast report or ask your Q360 administrator about a custom report.

Q: Why is the Average Age showing red?

A: An average age above 60 days (the default red threshold) means your pipeline contains many opportunities that have been open for a long time without progressing. This is a signal to review aging deals: update close dates, advance deals through the funnel, or close out opportunities that are no longer viable. Regular pipeline hygiene keeps this metric healthy.

Q: The New Opportunity By Month chart does not match the main dashboard totals. Why?

A: The main dashboard gauges and charts show only currently active opportunities. The New Opportunity By Month chart shows all opportunities entered in the last 12 months, including those that have since been won or lost. The chart is measuring pipeline generation activity (how many new deals entered), while the main view measures the current state of the pipeline.

Q: Why does an opportunity with a $0 value show up in the Opportunity Count but not affect the Total Pipeline?

A: The Opportunity Count gauge counts all active opportunity records. The Total Pipeline gauge sums their values. An opportunity with a $0 value contributes 1 to the count but $0 to the total. If you have many zero-value opportunities, the count will appear high relative to the pipeline value. Ensure that sales reps enter estimated values on all opportunities.

Q: I filtered by a sales group but some opportunities are missing. Why?

A: Sales group assignment is determined by the primary sales representative's group membership. If an opportunity's primary sales rep is not assigned to a sales group, that opportunity is classified as "Other" and may not match your selected group filter. Ensure all active sales reps are assigned to the appropriate sales groups.

Related Dashboards

- **Sales Dashboard** - Provides a per-rep view of tasks, opportunities, funnel position, and goal attainment. Use Sales Opportunities for the organizational view, then drill into the Sales Dashboard for individual rep details.
- **Sales Booking** - Shows deals that have been converted from quotes to orders. Sales Opportunities shows what is in the pipeline; Sales Booking shows what has come out of the pipeline as booked revenue.
- **Sales Score Card** - Benchmarks rep performance on a composite score including activities, opportunities, quotes, orders, and invoices.
- **Executive Dashboard** - Includes a high-level pipeline summary drawn from the same opportunity data. Start there for a quick read, then come here for the full analysis.
- **One Dashboard** - Projects future profitability and cash flow. Pipeline values from this dashboard feed into the forward-looking projections on One Dashboard.

Sales Booking Dashboard

Path: Dashboards > SALES > Sales Booking

Roles: Sales Managers, VPs of Sales, Controllers, and anyone who needs to track how much revenue has been booked (converted from quotes to orders) over a given time period.

Permission: Dashboards menu plus permission to this dashboard.

Purpose

The Sales Booking dashboard shows the results of the sales process - deals that have crossed the finish line from quote to order. While the Sales Opportunities dashboard shows what is in the pipeline, this dashboard shows what has actually been won and booked. It answers questions like:

- How much total revenue has been booked this period?
- What is the gross profit on those bookings?
- How many labor hours have been booked?
- How much recurring monthly revenue (RMR) has been booked?
- How many individual orders were booked, and what is the average deal size?
- How quickly are deals closing - what is the average number of days from quote to order?
- How are bookings distributed across branches, sale types, and sales teams?

This dashboard is essential for the Sales & Operations Planning process described in the executive operating rhythm. Bookings feed directly into backlog, which drives project scheduling, resource planning, and revenue forecasts.

Data Included

A "booking" on this dashboard is defined as an order that originated from a quote that has been formally converted. Specifically:

- The quote must have a status of "Converted" (meaning it has been turned into an order)
- The resulting order must not be cancelled
- The order's date (not the original quote date) determines which time period the booking falls into

This means that only orders with an explicit quote-to-order conversion path appear here. Orders created directly without a parent quote are **not** included, even if they are active.

For each booking, the dashboard includes:

- The order total (revenue booked)
- Gross profit

- A cost category breakdown: Material Revenue and Cost, Labor Revenue, Cost, and Hours, Subcontractor Revenue and Cost, Miscellaneous Revenue and Cost, and Recurring Monthly Revenue (RMR) and its cost
- The number of days it took to convert the quote to an order (closing days)
- The gross margin percentage
- Branch, department, sale type, and sales group assignments

The following are **not** included:

- Orders without a parent quote (direct orders)
- Cancelled orders (filtered out at both the order level and the line item level)
- Closed or cancelled quote line items within otherwise active orders (these line items are excluded from the cost category breakdown, though the order header totals remain as recorded)

Important distinction - RMR: On this dashboard, RMR is identified as items of M-type with Def/Warranty flag. The RMR value shown is the total booked amount for the period, not a monthly run-rate. If a 12-month maintenance contract worth $12,000 total is booked, the full $12,000 appears as RMR. To estimate the monthly revenue, divide by the contract term.

Dashboard Filters

Filter	Behavior	Default
Company No.	Narrows to one or more company (legal entity)	All companies
Branch	Narrows to one or more branches	All branches
Department	Narrows to one or more departments	All departments
Sales Group	Narrows to one or more sales groups	All groups
Sales Rep	Narrows to one or more sales representatives (only users with a Sales role appear in the list)	All reps
Sale Type	Narrows to one or more sale types (for example, Project or Service)	All types
Time Period	Sets the date range for the bookings shown	Current month

All organizational filters support multi-select. The Time Period filter sets the date window based on the order date (not the quote date).

Note: *The Sales Rep filter matches against the primary, secondary, and tertiary salesperson fields on each order. If an order has multiple reps assigned, selecting any one of them will show the full order. Revenue is not split between reps - the full order amount is attributed to each rep involved.*

Filters Sync

The Sales Booking data grid is the driver widget. All 8 KPI gauges and all 3 charts are synchronized to it. When you apply filters to the dashboard, every widget updates together because they all share the same underlying data.

Widgets

This dashboard contains twelve widgets: a data grid, eight KPI gauges, and three charts.

Widget: Sales Booking (Data Grid)

Description: A detailed table listing every booked order that matches the current filters. Each row represents one converted order, showing the sales rep, order amount, gross profit, company, branch, department, sale type, order number, quote date, order date, closing days, gross margin, and a full cost category breakdown (material, labor, subcontractor, miscellaneous, and RMR - both revenue and cost for each).

Data Source: Each row represents an order that was converted from a quote during the selected time period. The data grid is grouped by sales rep by default, so you see each rep's orders together with subtotals.

Interpreting Widget: Scan the list for the key financial columns: Amount (total order revenue), GP (gross profit), and GM (gross margin percentage, shown with a "%" indicator). The cost category columns let you see the composition of each deal - how much is material, how much is labor, how much is subcontractor work, and how much is recurring service revenue.

Widget Filtering: Responds to all dashboard filters.

Drilldown: Click any order number to open the full order record in Q360. This requires Order View permission.

Widget: Revenue Booked

Description: A single number showing the total revenue booked (the sum of all order totals) for the selected period.

Data Source: This is the sum of the order total amount across all bookings in the current filtered view.

Interpreting Widget: Displayed with a dollar sign prefix. The gauge uses green for all threshold ranges by default - it is an informational display rather than a performance indicator with red/yellow/green zones. Compare this number to your period target to assess booking performance.

Widget Filtering: Responds to all dashboard filters.

Drilldown: No drilldown. Informational only.

Widget: GP Booked

Description: A single number showing the total gross profit booked for the selected period.

Data Source: This is the sum of the gross profit field from each booked order's header.

Interpreting Widget: Compare to Revenue Booked to get a quick sense of overall margin. If GP Booked is a small fraction of Revenue Booked, your deals are low-margin. The gauge is informational (green thresholds by default).

Widget Filtering: Responds to all dashboard filters.

Drilldown: No drilldown. Informational only.

Data Quality Note: Gross profit can be negative on individual orders (loss-making deals). Negative GP on one order will reduce the overall GP Booked total.

Widget: Hours Booked

Description: A single number showing the total labor hours booked across all orders in the current filtered view.

Data Source: This is the sum of labor quantities from order line items classified as Labor type. It counts the number of hours (the quantity field), not the dollar value.

Interpreting Widget: This metric is especially useful for resource planning. If your team booked 500 labor hours this month, those hours will need to be delivered by your workforce. Compare to available capacity to assess whether your delivery team can handle the incoming workload. Color-coded red below 1,000 hours, yellow between 1,000 and 2,500, and green above 2,500 (default thresholds).

Widget Filtering: Responds to all dashboard filters.

Drilldown: No drilldown. Informational only.

Widget: RMR Booked

Description: A single number showing the total Recurring Monthly Revenue booked for the selected period.

Data Source: This is the sum of revenue from order line items classified as RMR - specifically, items with a Miscellaneous item type and a warranty flag. This typically includes maintenance contracts, support agreements, and monitoring services.

Interpreting Widget: RMR represents future recurring revenue. A growing RMR booking trend indicates increasing annuity-style revenue. Color-coded red below $300, yellow between $300 and $600, and green above $600 (default thresholds - these are typically customized for your organization).

Widget Filtering: Responds to all dashboard filters.

Drilldown: No drilldown. Informational only.

Data Quality Note: The RMR value shown is the total booked amount, not a monthly rate. If a contract is for $12,000 over 12 months, $12,000 appears here. Divide by the contract term to estimate the monthly revenue contribution.

Widget: Orders Booked

Description: A single number showing the total count of distinct orders booked in the current period.

Data Source: This is a count of unique order numbers in the current filtered view.

Interpreting Widget: Combined with Revenue Booked and Average Amount, this gives you a sense of deal volume. A high count with low average amount suggests many small deals; a low count with high average amount suggests fewer but larger deals. Color-coded red below 50, yellow between 50 and 150, and green above 150 (default thresholds).

Widget Filtering: Responds to all dashboard filters.

Drilldown: No drilldown. Informational only.

Widget: Average Amount

Description: A single number showing the average order total across all bookings in the current period.

Data Source: This is the arithmetic average of the order total amount across all booked orders in the filtered view.

Interpreting Widget: Track this over time to monitor deal size trends. Color-coded red below $30,000, yellow between $30,000 and $60,000, and green above $60,000 (default thresholds).

Widget Filtering: Responds to all dashboard filters.

Drilldown: No drilldown. Informational only.

Data Quality Note: Orders with a zero total are included in the average calculation. A free order or a fully credited order will pull the average down.

Widget: Average GP

Description: A single number showing the average gross profit per order across all bookings in the current period.

Data Source: This is the arithmetic average of the gross profit field across all booked orders.

Interpreting Widget: Compare to Average Amount to get a sense of the typical margin per deal. Color-coded red below $20,000, yellow between $20,000 and $40,000, and green above $40,000 (default thresholds).

Widget Filtering: Responds to all dashboard filters.

Drilldown: No drilldown. Informational only.

Widget: Average Closing Days

Description: A single number showing the average number of calendar days between quote creation and order conversion across all bookings in the current period.

Data Source: For each booked order, the system calculates the number of days between the original quote date and the order date. This gauge shows the average across all orders in the filtered view.

Interpreting Widget: The color coding is inverted - lower is better: green for 0–30 days (fast closing), yellow for 30–60 days, and red above 60 days (slow closing). A rising average closing time may indicate that deals are becoming more complex, that the approval process is slowing down, or that quotes are sitting without follow-up. A decreasing average suggests improved sales efficiency.

Widget Filtering: Responds to all dashboard filters.

Drilldown: No drilldown. Informational only.

Data Quality Note: Closing days are counted in calendar days, not business days. A quote created on Friday and converted to an order on Monday shows 3 closing days. In rare cases, the order date may be earlier than the quote date (a data entry issue), which would produce a negative closing days value and skew the average downward.

Widget: Booking By Branch

Description: A horizontal bar chart comparing total revenue booked and gross profit by branch. Each branch has two bars: one for the order amount (revenue) and one for gross profit.

Data Source: Booked orders are grouped by their branch assignment. For each branch, the total order amount and total gross profit are summed.

Interpreting Widget: The gap between the revenue bar and the GP bar represents cost. A branch with a large revenue bar but a small GP bar is generating high revenue at low margins. Compare branches side by side to identify which offices are booking the most profitable business.

Widget Filtering: Responds to all dashboard filters.

Drilldown: Clicking a branch bar filters the data grid and other widgets to show only bookings from that branch.

Widget: Booking By Sale Type

Description: A horizontal bar chart comparing total revenue booked and gross profit by sale type (for example, Project, Service, or other categories defined in your system). Each sale type has two bars: one for revenue and one for gross profit.

Data Source: Booked orders are grouped by their sale type. Revenue and GP are summed per type.

Interpreting Widget: This chart reveals the mix of business you are winning. If most bookings are Project-type, your revenue will be heavily project-driven. A healthy mix of sale types diversifies your revenue streams. Compare the margin (gap between revenue and GP bars) across types - some sale types may be inherently more profitable than others.

Widget Filtering: Responds to all dashboard filters.

Drilldown: Clicking a bar filters other widgets to show only bookings of that sale type.

Widget: Revenue Booked By Team (Top 8)

Description: A vertical bar chart showing revenue booked and gross profit by sales group, limited to the top 8 groups by revenue. Each group has two bars: revenue and gross profit.

Data Source: Booked orders are grouped by their sales group assignment (based on the primary salesperson's group membership). Revenue and GP are summed per group. Only the top 8 groups by total revenue are displayed.

Interpreting Widget: This chart ranks your sales teams by booking performance. The tallest bars represent your highest-producing teams. Compare the GP bars to the revenue bars to see which teams are booking the most profitable business.

Widget Filtering: Responds to all dashboard filters.

Drilldown: Clicking a bar filters other widgets to show only bookings from that sales group.

Data Quality Note: Sales group assignment is based on the primary salesperson's group membership only. If the secondary or tertiary salesperson belongs to a different group, their group is not reflected. If a salesperson has no group assignment, their orders appear under a group labeled "Other." Only the top 8 groups are shown - if you have more than 8 sales groups, groups 9 and beyond are not displayed in this chart. Use the data grid to see the complete breakdown.

Widgets Relationship

All eleven visualization widgets (eight gauges and three charts) are synchronized to the Sales Booking data grid. They all share the same underlying dataset and respond to the same filters. When you apply a filter (for example, selecting a specific branch or time period), every gauge and chart updates in unison.

This single-data-source design means the numbers are always consistent across widgets. The Revenue Booked gauge will always match the sum of the Amount column in the data grid, the GP Booked gauge will match the sum of the GP column, and so on.

Data Freshness

This dashboard pulls data each time it loads or is refreshed. New bookings (quote-to-order conversions) in Q360 will appear the next time you refresh the dashboard. If an order is converted mid-day, it will be visible on the next page load.

Frequently Asked Questions

Q: I see an order in Q360 but it does not appear on this dashboard. Why?

A: This dashboard only shows orders that were converted from quotes. If the order was created directly (without a parent quote), it will not appear here. Additionally, cancelled orders are excluded. Verify that the order has a parent quote with a "CONVERTED" status and that the order itself is not cancelled.

Q: Why does the revenue on this dashboard not match our accounting reports?

A: The booking amount shown here is the order total at the time of conversion - it is not adjusted for subsequent changes, returns, or credit memos. Additionally, this dashboard uses the order date (not the invoice date or the revenue recognition date) to determine which period a booking falls into. Accounting reports may use different date bases and may include adjustments not reflected here.

Q: The RMR number seems very high. Is that the monthly revenue?

A: No. RMR on this dashboard shows the total booked amount for recurring service items, not the monthly rate. If a 12-month contract for $12,000 is booked, the full $12,000 appears here. To estimate the monthly revenue contribution, divide by the contract term (in this example, $12,000 ÷ 12 = $1,000/month).

Q: Why does Average Closing Days show a negative number?

A: A negative closing days value means an order date is earlier than its parent quote date. This is typically a data entry error - for example, if someone backdated the order. Review the affected orders and correct the dates if necessary.

Q: A booking shows under "Other" in the Revenue by Team chart. What does that mean?

A: "Other" is used for orders where the primary salesperson is not assigned to any sales group. To correct this, ensure all active salespeople have a group assignment in the Sales Group configuration (Sales > Admin > Sales Group).

Q: Can I see the cost breakdown for a specific order?

A: Yes. The data grid includes columns for Material Revenue, Material Cost, Labor Revenue, Labor Cost, Labor Hours, Subcontractor Revenue, Subcontractor Cost, Misc Revenue, Misc Cost, RMR, and RMR Cost. Scroll right in the grid or click the order number to open the full order record.

Q: Why does the order total not match the sum of the cost category revenues?

A: The order total (Amount column) comes from the order header and is set at the time of conversion. The cost category breakdown comes from the individual line items, excluding cancelled items. If line items were cancelled after conversion, the header total remains unchanged but the category breakdown will be smaller. This is a known characteristic - the header total is a snapshot, while the category breakdown reflects current line item status.

Related Dashboards

- **Sales Opportunities** - Shows the active pipeline (deals still in progress). Sales Booking shows the deals that have come out of that pipeline as converted orders.
- **Sales Dashboard** - Includes sales goal gauges that measure quota attainment using the same converted-quote data shown on this dashboard. The Sales Dashboard measures individual rep goals; Sales Booking provides the organization-wide booking breakdown.
- **Sales Score Card** - Awards score points for orders booked. The order data that feeds the Score Card's order score comes from the same records shown here.
- **Revenue Dashboard** - Shows recognized revenue. Bookings create the backlog that eventually converts into recognized revenue. A booking appears here first, then later appears on the Revenue Dashboard as revenue is recognized.
- **Cash Forecast** - Uses booking and backlog data as inputs for cash flow projections. Strong bookings today drive future cash inflows.
- **Executive Dashboard** - Includes a high-level bookings summary drawn from the same underlying data.

Sales Score Card Dashboard

Path: Dashboards > SALES > Sales Score Card

Roles: Sales Managers, VPs of Sales, and anyone who needs to compare sales representative performance across multiple dimensions and benchmark reps against each other and against their targets.

Permission: Dashboards menu plus permission to this dashboard.

Purpose

The Sales Score Card dashboard provides a composite performance score for each sales representative, combining activity, opportunity, quote, order, invoice, and funnel metrics into a single number that can be compared against a configurable target. It answers questions like:

- How does each sales rep's overall score compare to their target?
- Which reps are the top performers this period?
- What types of activities are driving each rep's activity score?
- Are reps earning points from a balanced mix of sales activities, or are they concentrated in one area?
- How do prospect-facing activities compare to existing-customer activities across the team?

This dashboard is designed for sales performance reviews, team meetings, and coaching sessions. It provides an objective, quantifiable comparison across the sales team based on configurable scoring rules.

Data Included

The Score Card includes **active users with the Sales job role and a non-zero sales target**. If a user does not have the Sales role assigned, or if their sales score target has not been configured, they will not appear on this dashboard - even if they have sales activity.

For each qualifying rep, the dashboard calculates scores across six categories:

- **Activity Score:** Based on sales activities (calls, emails, meetings, etc.) logged during the period. Each activity type has a configurable weight - more valuable activity types earn more points. Activities involving prospects can be weighted differently from those involving existing customers using a configurable prospect multiplier.
- **Opportunity Score:** Based on the count and value of new opportunities entered during the period. Points are awarded both for creating opportunities (count score) and for their dollar value (value score, scaled by a configurable multiplier).
- **Funnel Score:** Based on funnel stage completions during the period. Similar to the opportunity score, points are awarded for progressing opportunities through funnel stages.
- **Quote Score:** Based on quotes created during the period (excluding quick-list quotes). Points are awarded for quote count and quoted value.

- **Order Score:** Based on orders booked during the period. Points are awarded for order count and order value.
- **Invoice Score:** Based on posted invoices during the period. Points are awarded for invoice count and invoice value.

Each category's scoring formula uses configurable parameters (count score, value score, and value multiplier) that your Q360 administrator sets based on your organization's priorities. The prospect multiplier allows activities and transactions involving prospective customers to be weighted higher or lower than those involving existing customers.

The **composite score** is the sum of all six category scores. This composite is compared against the rep's target to determine whether they are on track.

The following are **not** included:

- Users without the Sales job role
- Users whose accounts are inactive
- Users with no sales score target configured (or a target of zero)
- Draft invoices (only posted invoices count toward the invoice score)
- Quick-list quotes (these are excluded from the quote score, though they may still contribute indirectly through linked opportunities)

Dashboard Filters

Filter	Behavior	Default
Company No.	Narrows to reps in a specific company (legal entity)	All companies
Branch	Narrows to reps in a specific branch	All branches
Department	Narrows to reps in a specific department	All departments
Time Period	Sets the reporting time period (for example, Calendar Year-to-Date, Month-to-Date, Last Quarter)	Calendar YTD

Note: *The Time Period filter affects which activities, opportunities, quotes, orders, and invoices are counted. Only items dated within the selected period contribute to the scores. The target is adjusted proportionally based on the period length - for example, if the period covers 6 months of a 12-month year, the target is scaled to half the annual target.*

Filters Sync

The Score Card data grid is the driver widget. Both charts are synchronized to it. When you apply filters, all three widgets update together.

Widgets

This dashboard contains three widgets: a data grid and two charts.

Widget: Sales Score Card (Data Grid)

Description: A table listing every qualifying sales rep with their individual scores. The columns include User ID, Target, Activity Type, Activity Score, Opportunity Score, Quote Score, Order Score, Invoice Score, and Funnel Score. The grid is grouped by User ID, with one row per activity type per rep (since different activity types earn different scores).

Data Source: The scoring procedure queries activities, opportunities, funnel completions, quotes, orders, and invoices for each rep within the selected time period, applies the scoring formulas and prospect multiplier, and returns a row per activity type per rep.

Interpreting Widget: Within each rep's group, the Activity Score column shows how many points they earned from each type of sales activity (calls, emails, meetings, etc.). The Opportunity, Quote, Order, Invoice, and Funnel scores are the same across all rows for a given rep (they appear on each row but represent the rep's total for that category). The Target column shows the rep's adjusted target for the selected period.

Widget Filtering: Responds to all dashboard filters (Company, Branch, Department, Time Period).

Drilldown: The data grid supports standard grid interactions. Clicking on a rep filters the charts below to highlight that individual.

Widget: Score Card Target Achievement

Description: A vertical bar chart comparing each sales rep's composite score against their target. Each rep has two side-by-side bars: one for their total score (in teal/blue) and one for their target (in green).

Data Source: The score bar represents the sum of all six score categories for the rep. The target bar represents the rep's configured sales score target, adjusted proportionally for the selected time period.

Interpreting Widget: If the score bar is taller than the target bar, the rep is exceeding their target. If the score bar is shorter, they are falling behind. Reps with dramatically different bar heights may need coaching (if behind) or recognition (if ahead). All reps are shown - there is no limit on the number of reps displayed.

Widget Filtering: Responds to all dashboard filters. Clicking a bar filters the data grid to show only that rep's details.

Drilldown: Click a bar to filter the data grid to that rep.

Widget: Activity Score By Rep (Top 10)

Description: A horizontal stacked bar chart showing the top 10 sales reps ranked by total activity score. Each bar is broken into colored segments, with each segment representing a different activity type (for example, calls in one color, emails in another, meetings in a third).

Data Source: Activity scores are calculated per rep per activity type. The chart stacks these scores to show both the total activity score and its composition. Only the top 10 reps by total activity score are displayed.

Interpreting Widget: Longer bars indicate more active reps. The color segments reveal the types of activities driving each rep's score. A rep whose bar is entirely one color is focused on a single activity type - this may or may not be desirable depending on your sales process. A rep with a diverse mix of colors is engaging in multiple types of sales activities. Compare the top performer's activity mix to understand what differentiates high scorers.

Widget Filtering: Responds to all dashboard filters. Clicking a bar filters the data grid to show that rep's details.

Drilldown: Click a bar to filter the data grid to that rep.

Data Quality Note: If fewer than 10 qualifying reps exist in the filtered view, the chart displays only those reps. The chart title says "Top 10" but it will show fewer if the data warrants it.

Widgets Relationship

The data grid, the Score Card Target Achievement chart, and the Activity Score By Rep chart are all synchronized. They share the same underlying data and respond to the same filters. When you click on a bar in either chart, the data grid filters to show only that rep's detailed rows, making it easy to drill into an individual's score composition.

A typical workflow for a monthly sales review: start by looking at the Score Card Target Achievement chart to see which reps are above or below target. Click on a rep who is below target to see their detailed score breakdown in the data grid. Check which score categories are low - if their activity score is strong but their order score is zero, they may be busy but not converting. Then look at the Activity Score By Rep chart to see how the top performers are spending their time and whether coaching opportunities exist.

Data Freshness

This dashboard pulls data each time it loads or is refreshed. New activities, opportunities, quotes, orders, and invoices entered in Q360 will be reflected in the scores the next time the dashboard is refreshed. Scoring configuration changes (activity type weights, score targets, prospect multiplier) also take effect immediately on the next refresh.

Frequently Asked Questions

Q: A sales rep does not appear on the Score Card at all. Why?

A: Three conditions must be met for a rep to appear: (1) they must have the Sales job role assigned in Q360, (2) their user account must be active, and (3) they must have a non-zero sales score target configured. If any of these is missing, the rep is excluded entirely. Ask your Q360 administrator to verify the rep's job role, active status, and sales score target.

Q: What determines the weight of each activity type?

A: Each activity type in Q360 has a configurable weight value. Your Q360 administrator sets these weights based on which activities the organization values most - for example, face-to-face meetings might be weighted higher than emails. The weight is multiplied by the prospect multiplier if the activity involves a prospective customer (rather than an existing customer). Contact your Q360 administrator to review or adjust the activity type weights.

Q: How does the prospect multiplier work?

A: Your Q360 administrator configures a prospect multiplier value in the system settings. When a scored activity, opportunity, quote, order, or invoice involves a prospective customer (one not classified as an existing customer), the score for that item is multiplied by this factor. If the multiplier is 1.5, prospect-facing work earns 50% more points. If it is 0.8, prospect-facing work earns fewer points. The multiplier encourages (or discourages) new business development relative to existing account management, depending on organizational priorities.

Q: Why does a rep's score seem low even though they have strong sales numbers?

A: The composite score includes six categories, and strong performance in one area does not guarantee a high overall score. A rep with excellent order and invoice scores but zero activity, opportunity, or funnel scores may still fall below target. The Score Card is designed to measure the full breadth of sales behavior, not just booking results. Review the individual score columns in the data grid to see where the gap is.

Q: If an activity type's weight is changed mid-period, does it affect already-recorded activities?

A: Yes. The scoring uses the current weight configuration at query time, not the weight that was in place when the activity was recorded. If a weight is changed from 5 to 10 mid-month, all activities of that type for the entire period are scored at 10. There is no historical snapshot of weights. Similarly, if an activity type is deactivated, all activities of that type for the period will no longer be scored, even those recorded before the deactivation.

Q: Can a rep's score be negative?

A: In most cases, scores are positive because they are based on counts and values of activities and transactions. However, the value-based components (opportunity score, order score, invoice score) use the dollar value in their calculation. If a transaction has a negative value (for example, a credit memo invoice), the value component of the score for that item will be negative, which could reduce the overall score. The count component always adds a positive amount. In practice, negative scores are rare and typically indicate data anomalies that should be investigated.

Q: The Score Card Target Achievement chart shows a rep above target, but their manager says they are behind on quota. Why the discrepancy?

A: The Score Card target is a composite score target that includes activities, opportunities, quotes, orders, invoices, and funnel completions - it is not the same as a sales quota or commission target. A rep can earn a high composite score through strong activity and opportunity creation even if their actual booked revenue (which is only one component of the score) is below their sales quota. The Score Card measures breadth of sales behavior; the Sales Dashboard goal gauges measure revenue against quota. Both are useful but they measure different things.

Q: How is the target adjusted for the time period?

A: The target is scaled by the number of periods in the selected time range. The system configuration specifies whether the target is expressed per day, per week, per month, per quarter, or per year. If the target is monthly and the selected time period is Calendar Year-to-Date covering 6 months, the displayed target is 6 times the monthly target. If the time period covers zero days (an edge case), the target defaults to the base target without scaling.

Related Dashboards

- **Sales Dashboard** - Provides a per-rep view of tasks, opportunities, funnel, and quota attainment. The Score Card compares all reps; the Sales Dashboard deep-dives into one rep at a time.
- **Sales Opportunities** - Shows the active pipeline. Opportunity scores on the Score Card reward reps for creating pipeline; the Sales Opportunities dashboard shows the result of that pipeline creation.
- **Sales Booking** - Shows converted orders. Order scores on the Score Card reward reps for converting quotes to orders; Sales Booking provides the detailed booking analysis.
- **Executive Dashboard** - Provides a high-level view of organizational performance. The Score Card feeds into the executive understanding of which reps are driving results and where coaching is needed.

Projects & Operations Dashboards

These dashboards provide project managers, operations leaders, and purchasing teams with visibility into project health, resource allocation, pre-sales effort, procurement activity, and employee utilization. Together, they help you understand how your organization's delivery engine is performing - from the time an opportunity enters the pre-sales engineering phase through project execution, resource management, and procurement.

The four dashboards in this section serve distinct but connected purposes. The Project Overview gives you a financial snapshot of your entire project portfolio - revenue, backlog, billing status, and gross profit. Pre-Sales Engineering tracks how much time your technical team invests in opportunities before they become projects, segmented by outcome. Purchasing monitors procurement spending patterns across vendors, buyers, and departments. Employee Utilization shows how well your workforce's time is being allocated between billable and non-billable work.

Used together during weekly or monthly operational reviews, these dashboards help leadership answer the questions that drive healthy project delivery: Are we billing what we have earned? Is our backlog growing or shrinking? Are we investing pre-sales time in opportunities that close? Where is our purchasing spend concentrated? And are our people being utilized effectively?

Project Overview Dashboard

Path: Dashboards > Project Overview

Roles: Project Managers, Operations Directors, Finance Teams, and Executives who need a consolidated financial view of all active projects.

Permission: Dashboards menu plus permission to this dashboard.

Purpose

The Project Overview dashboard provides a comprehensive financial and operational snapshot of your organization's entire project portfolio. It brings together projected revenue, earned revenue, hours, backlog, and billing status into one screen, answering questions like:

- What is the total projected revenue across all our active projects?
- How much of that projected revenue have we earned, invoiced, and collected?
- How many hours have we used versus how many remain?
- What is our total backlog, and how has it trended over the past twelve months?
- How does gross profit compare across branches?
- Which project leaders are managing the most revenue?

This is a point-in-time view - it reflects today's project data. The backlog trend chart at the bottom shows twelve months of history, giving you context for whether the portfolio is growing or contracting.

Data Included

This dashboard shows all projects that have a current-day BI data snapshot in. This includes projects in all states - pre-active, active, and completed - unless you apply a filter to narrow the view.

The following are **not** included:

- Historical snapshots from previous days (only today's figures are shown in the main project list and gauges)
- Projects that do not have a snapshot recorded for today's date (this could happen if the nightly data process has not yet run)

The backlog trend chart operates slightly differently: it shows month-end snapshots for the past twelve months, but only for projects that use the deferred revenue accounting method. Projects using other revenue recognition methods appear in the Total Backlog gauge but not in the trend chart.

Dashboard Filters

The Project Overview dashboard offers the following filters, which appear when you interact with the data:

Filter	Behavior	Default
Company	Narrows to a specific company (legal entity)	All companies
Branch	Narrows to a specific branch	All branches
Department	Narrows to a specific department	All departments
Type	Narrows to one or more project (sale) types	All types
PM (Project Manager)	Narrows to projects managed by a specific person	All project managers
Project State	Narrows to a project lifecycle stage: Pre-Active, Active, or Post-Active (Completed)	All states

Note: *The Project Manager dropdown shows only users who have the Project Manager role in Q360. If a project leader does not appear in the list, check whether they have been assigned the Project Manager role in the system.*

Filters Sync

The Project List grid on the right side of the screen drives the rest of the dashboard. When you apply a filter to the Project List, the gauges, percentage bars, and gross profit chart all update to reflect the same filtered set of projects. The Backlog Burn Rate trend chart at the bottom also receives the same Company, Branch, Department, Type, and Project Manager filters, ensuring that the trend view aligns with the project list above it.

Widgets

This dashboard contains multiple widgets organized across three visual areas: a column of gauges and percentage indicators on the left, a gross profit comparison chart and project list on the right, and a backlog trend chart along the bottom.

Widget: Projects By Project Leader

Description: A summary table on the right side of the screen listing each project leader with their total projected revenue, invoiced amount, and paid amount. Each project leader appears as a row, with their financial totals summed across all their projects.

Data Source: This table pulls from Q360's project work-in-progress data as of today. It groups all projects by the assigned project leader and sums three key financial figures: projected revenue (the total contract value), invoiced amount (what has been billed to the customer), and paid amount (what the customer has actually paid).

Interpreting Widget: The project leader with the largest projected revenue is managing the most contract value. Compare the invoiced and paid columns against projected revenue to spot leaders who may have large amounts of work that has not yet been billed or collected.

Widget Filtering: This table responds to all dashboard filters (Company, Branch, Department, Type, Project Manager, and Project State). It acts as the master widget - when you click on a project leader row, all other widgets on the dashboard update to show only that leader's projects.

Drilldown: Click on a project leader row to filter all other widgets to that leader's projects. Click on an individual project number (if visible in the detail) to open the full project record in Q360, where you can review tasks, materials, and financial details. You need project viewing permission to access the project record.

Widget: Total Projected Revenue

Description: A single dollar figure displayed as a gauge in the upper-left area, showing the sum of projected revenue across all projects in the current view.

Data Source: This is the sum of the projected revenue field for every project in today's snapshot that matches the current filters.

Interpreting Widget: This represents the total contract value of your project portfolio. The gauge uses color coding: green indicates the portfolio value is above $1 million, yellow indicates it is between $100,000 and $1 million, and red indicates it is below $100,000. These thresholds are general indicators - your organization's targets may differ.

Widget Filtering: Updates automatically when you change any dashboard filter or click on a project leader in the list.

Drilldown: This gauge is informational - clicking it does not open a separate view.

***Note:** Despite its label "Total Projects," this widget displays the total dollar value of projected revenue, not a count of projects. It represents the total financial value of your project portfolio.*

Widget: Total Hours

Description: A single number showing the total projected hours across all projects in the current view.

Data Source: This sums the projected hours from each project's work-in-progress data.

Interpreting Widget: This is the total labor hours that your projects are expected to require. Compare it to the Total Hours Used gauge below to understand how much of the planned work has been completed.

Widget Filtering: Updates with all dashboard filters and project leader selections.

Drilldown: No drilldown. Informational only.

Widget: Total Hours Used

Description: A single number showing the total earned (actual) hours consumed across all projects.

Data Source: This sums the earned hours field, which represents hours that have actually been worked and recorded against projects.

Interpreting Widget: Compare this to Total Hours to understand overall progress. If Total Hours Used is approaching Total Hours and many projects are not yet complete, you may be running over budget on labor.

Widget Filtering: Updates with all dashboard filters.

Drilldown: No drilldown. Informational only.

Widget: Hours Remaining

Description: A single number showing the difference between projected hours and earned hours - the hours of work still expected to complete the projects.

Data Source: Calculated as Total Hours minus Total Hours Used.

Interpreting Widget: A large number of remaining hours indicates significant work ahead. If this number is negative, it means you have used more hours than were originally projected, which may indicate scope changes, estimation errors, or efficiency issues that should be investigated.

Widget Filtering: Updates with all dashboard filters.

Drilldown: No drilldown. Informational only.

Widget: Uninvoiced

Description: A dollar figure showing the total amount of projected revenue that has not yet been invoiced.

Data Source: Calculated as projected revenue minus invoiced amount for each project, then summed.

Interpreting Widget: The color coding on this gauge is reversed from the others - a smaller uninvoiced amount is green (good), meaning you have billed most of what you are contracted for. A larger uninvoiced amount is red, indicating a significant billing gap. If this number is negative, it means you have invoiced more than the projected revenue (overbilling), which may indicate a change order that has not been reflected in the projected revenue, or a data entry issue.

Widget Filtering: Updates with all dashboard filters.

Drilldown: No drilldown. Informational only.

Widget: Total Backlog

Description: A dollar figure showing the total backlog - contracted revenue that has not yet been earned - across all projects.

Data Source: This is the sum of the backlog field from today's project snapshot for all projects matching the current filters.

Interpreting Widget: Backlog represents your future revenue pipeline from existing contracts. A healthy backlog gives confidence in future revenue, while a declining backlog may signal the need for more sales activity. The gauge displays green for backlog above $200,000, yellow between $50,000 and $200,000, and red below $50,000.

Widget Filtering: Updates with all dashboard filters.

Drilldown: No drilldown. Informational only.

Important: *The Total Backlog gauge includes all projects regardless of their revenue recognition method. The Backlog Burn Rate chart below shows only deferred-revenue projects. If your organization uses mixed accounting methods, these two figures will not match exactly - the gauge will be higher than the most recent month in the trend chart.*

Widget: Earned vs. Projected

Description: A horizontal percentage bar showing how much of the total projected revenue has been earned.

Data Source: Calculated as (total earned revenue ÷ total projected revenue) × 100.

Interpreting Widget: This percentage tells you how far along your project portfolio is in terms of revenue recognition. Green (75–100%) means most projected work is complete. Yellow (30–75%) means the portfolio is mid-flight. Red (below 30%) means most work is still ahead. If the projects are filtered to a single leader or branch, this shows that segment's completion rate.

Widget Filtering: Updates with all dashboard filters.

Drilldown: No drilldown. Informational only.

Note: *If all filtered projects have zero projected revenue, this bar cannot calculate a percentage and will appear blank.*

Widget: Invoiced vs. Projected

Description: A horizontal percentage bar showing how much of the total projected revenue has been invoiced.

Data Source: Calculated as (total invoiced amount ÷ total projected revenue) × 100.

Interpreting Widget: A high percentage means most of the contracted value has been billed to customers. A low percentage may indicate billing delays that should be addressed. Green starts at 70%, yellow at 30%, and red below 30%.

Widget Filtering: Updates with all dashboard filters.

Drilldown: No drilldown. Informational only.

Widget: Paid vs. Invoiced

Description: A horizontal percentage bar showing how much of the invoiced amount has been collected.

Data Source: Calculated as (total paid amount ÷ total invoiced amount) × 100.

Interpreting Widget: This is your collection effectiveness indicator. A high percentage means customers are paying their invoices. A low percentage may signal collection issues that need attention from your accounts receivable team. Review the Accounts Receivable dashboard for aging details.

Widget Filtering: Updates with all dashboard filters.

Drilldown: No drilldown. Informational only.

Widget: Cost vs. Actual (Percent Complete)

Description: A horizontal percentage bar showing how much of the projected cost has been incurred.

Data Source: Calculated as (total earned costs ÷ total projected costs) × 100, where earned costs include all materials, labor, subcontracting, and miscellaneous costs that have been recorded.

Interpreting Widget: This is effectively a percent-complete indicator based on cost progress. If you are using a cost-to-complete accounting method (where project completion is measured by the ratio of costs incurred to costs projected), this bar tells you how far through the work you are. Green starts at 75%, yellow at 30%, and red below 30%.

Widget Filtering: Updates with all dashboard filters.

Drilldown: No drilldown. Informational only.

Widget: Gross Profit By Branch

Description: A grouped bar chart in the center of the screen comparing projected gross profit, earned gross profit, and budgeted gross profit across branches.

Data Source: For each branch, the chart sums three values from today's project snapshot: projected gross profit (the expected profit based on current projections), earned gross profit (the profit realized so far based on actual costs), and budgeted gross profit (the original profit plan from when the project was set up).

Interpreting Widget: Each branch shows three bars side by side. If the earned bar is shorter than the projected bar, the branch has not yet realized its expected profit - which is normal for projects in progress. If the earned bar exceeds the budgeted bar, the branch is outperforming its original plan. If earned is significantly lower than both projected and budgeted, the branch may have cost overruns or underperforming projects.

Widget Filtering: Updates with all dashboard filters.

Drilldown: Clicking on a branch bar will filter the Project List to show only that branch's projects.

Widget: Backlog Burn Rate

Description: A bar chart along the bottom of the screen showing the total backlog amount at the end of each of the last twelve months.

Data Source: This chart uses month-end snapshots from Q360's project data. For each month-end over the past twelve months, it sums the backlog across all projects that use the deferred revenue accounting method and have a period-end snapshot recorded.

Interpreting Widget: An upward trend means your backlog is growing - you are adding more contracted revenue than you are earning through project delivery. A downward trend means your backlog is shrinking - you are delivering faster than new work is coming in. A steady line suggests balanced intake and delivery. Sudden drops may indicate large projects completing or contracts ending. Sudden spikes may indicate new project wins.

Widget Filtering: Receives the same Company, Branch, Department, Type, and Project Manager filters as the Project List. However, it always shows only deferred-revenue projects.

Drilldown: No drilldown. Informational only.

Note: *This chart and the Total Backlog gauge may show different totals because the chart includes only deferred-revenue projects, while the gauge includes all projects. If your organization uses only deferred revenue for project accounting, the two values should align closely (with the gauge showing today's figure and the chart showing the most recent month-end).*

Widgets Relationship

The Project List grid on the right is the master widget. When you click a project leader row, every gauge, percentage bar, and the gross profit chart update to show only that leader's projects. This lets you quickly evaluate any project leader's performance.

The dashboard filters (Company, Branch, Department, Type, Project Manager, Project State) affect both the main project data and the backlog trend chart, keeping the entire screen in sync. This means you can filter to a single branch and see that branch's financial health, billing status, backlog trend, and gross profit in one view.

The Backlog Burn Rate chart operates independently from direct click interactions - clicking it does not filter other widgets. It serves as a read-only historical reference.

Data Freshness

The main project data (all gauges, percentages, the gross profit chart, and the project list) reflects today's snapshot. If you update a project's financial information in Q360, those changes will appear on this dashboard the next time it loads or is refreshed.

The Backlog Burn Rate chart uses month-end snapshots. Changes to project data during the month will not affect historical data points - only the current month's data point updates when the next month-end snapshot is recorded.

Frequently Asked Questions

Q: Why does the Total Backlog gauge show a different number than the latest bar in the Backlog Burn Rate chart?

A: The Total Backlog gauge includes all projects, while the Backlog Burn Rate chart includes only projects that use the deferred revenue accounting method. If some of your projects use other accounting methods, their backlog will appear in the gauge but not in the chart.

Q: Why does the "Earned vs. Projected" bar show as blank or zero?

A: If the filtered projects have zero total projected revenue, the percentage cannot be calculated. This can happen if you filter to a project type or leader that has no projected revenue. Adjust your filters to include projects with financial data.

Q: I see a negative number in the Uninvoiced gauge. What does that mean?

A: A negative uninvoiced amount means you have invoiced more than the projected revenue for the filtered projects. This typically happens when a change order increased the scope of work but the projected revenue in Q360 has not been updated to match. Review the affected projects and update their projected revenue if needed.

Q: Why does a project leader not appear in the PM filter dropdown?

A: The PM filter only shows users who have been assigned the "Project Manager" job role in Q360. If a person manages projects but has not been given this role, they will not appear in the dropdown. Ask your Q360 administrator to assign the role.

Q: The Backlog Burn Rate chart shows a sudden drop in a specific month. What happened?

A: A sudden drop usually indicates that one or more large projects completed (or were closed) during that month, removing their backlog from the total. Check project close dates around that period. It can also indicate a project that changed its accounting method or was reclassified.

Q: How is "percent complete" determined on this dashboard?

A: The "Cost vs. Actual" gauge shows the percentage of projected costs that have been incurred. For organizations that measure project progress by cost completion, this is equivalent to percent complete. For organizations that use other methods (such as milestones or units of delivery), this gauge may not align with your project management definition of percent complete.

Related Dashboards

- **Executive Dashboard** - Includes high-level project gauges (total backlog, project gross profit) as part of its cross-functional summary. Start there for a quick check, then come here for the full project portfolio view.
- **Employee Utilization** - Shows how employee time is allocated across projects, service calls, and administration. Use Project Overview to understand project financials, then Employee Utilization to understand how your people are spending their time on those projects.
- **One Dashboard** - Provides a forward-looking view of profitability that incorporates project backlog into the revenue forecast. Use the One Dashboard for forward projections and Project Overview for the current snapshot.
- **Cash Forecast** - Includes project billing in its cash flow projections. If the Uninvoiced gauge here is high, the Cash Forecast can help you understand the cash impact of delayed billing.

Pre-Sales Engineering - Time (Hrs) Dashboard

Path: Dashboards > SALES > Pre-Sales Engineering - Time (Hrs)

Roles: Sales Managers, Pre-Sales Engineers, Engineering Managers, and Executives who want to understand how much technical effort is being invested in the sales pipeline and whether that investment is paying off.

Permission: Dashboards menu plus permission to this dashboard.

Purpose

The Pre-Sales Engineering dashboard shows how your technical team's time is being spent on sales opportunities - before those opportunities become projects. It answers questions like:

- How many hours of engineering time are we investing in the sales pipeline each month?
- Is that time being spent on opportunities we ultimately win, or are we investing heavily in deals we lose?
- Which sales reps are consuming the most pre-sales engineering time?
- Which product lines or service categories require the most technical support during the sales process?
- Which individual engineers are carrying the heaviest pre-sales workload?

By breaking hours into three categories - Active (opportunity still in progress), Won (opportunity closed successfully), and Lost (opportunity was not won) - this dashboard helps leadership evaluate whether pre-sales engineering effort is being directed toward the right opportunities.

Data Included

This dashboard includes all time logged against sales opportunities within the selected time period (the default is the last twelve months). Any time an engineer or other team member records time against an opportunity in Q360, those hours appear on this dashboard.

The following are **not** included:

- Time logged against projects (that appears on Employee Utilization)
- Time logged against service calls (that appears on Employee Utilization)
- Time not linked to any opportunity
- Opportunities with no time logged against them (they simply will not appear because there are no hours to report)

Dashboard Filters

The filters on this dashboard are pre-configured and not directly visible on the screen. The dashboard uses the following default settings:

Filter	Behavior	Default
Company	Narrows to a specific company (legal entity)	All companies
Branch	Narrows to a specific branch	All branches
Department	Narrows to a specific department	All departments
Interest	Narrows to a specific opportunity interest	All types
Time Period	Controls the date range of time bills shown.	Calendar year to date

Filters Sync

The four charts on this dashboard share the same Company, Branch, Department, and Interest filter values. When these values change, all four charts update together. This ensures that the monthly trend, the rep breakdown, the interest breakdown, and the engineer breakdown all reflect the same data scope.

Widgets

This dashboard contains four charts arranged in a two-by-two grid. The top-left shows the monthly trend, the top-right breaks down hours by opportunity type (Interest), the bottom-left shows hours by sales rep, and the bottom-right shows hours by engineer. All four charts use the same color coding: teal for Active opportunities, dark gray for Won opportunities, and red for Lost opportunities.

Widget: Pre-Sales Time - Trailing 12 Months

Description: A stacked bar chart showing total pre-sales hours by month, with each month's bar divided into three colored segments: teal (Active), dark gray (Won), and red (Lost).

Data Source: Each bar represents one calendar month within the selected time period. The height of each segment reflects the total hours logged against opportunities in that status category for that month.

Interpreting Widget: Look for trends over time. Are total pre-sales hours increasing or decreasing? What proportion of effort is going to opportunities that are ultimately won versus lost? A healthy pattern typically shows a growing proportion of Won hours over time, indicating that engineering effort is being directed toward winnable deals. If the red (Lost) segment is consistently large, it may suggest that technical resources are being engaged too early or on unqualified opportunities.

Widget Filtering: Responds to all shared dashboard filters (Company, Branch, Department, Interest, Time Period).

Drilldown: No drilldown. Informational only.

Note: *Months with no time logged will not appear on the chart (there will be a gap, not a zero-height bar). Hours are rounded to whole numbers on the chart, so small fractional differences between the chart and detailed reports are normal.*

Widget: Pre-Sales Time By Rep

Description: A horizontal stacked bar chart showing total pre-sales hours per sales representative, with each bar divided into Active, Won, and Lost segments.

Data Source: Hours are grouped by the sales rep assigned to each opportunity. The stacked segments show how each rep's consumed engineering time breaks down by opportunity outcome.

Interpreting Widget: Longer bars indicate reps who are consuming more pre-sales engineering time. Compare the Won (dark gray) segment to the Lost (red) segment for each rep. A rep with a high proportion of Won hours is effectively converting their engineering investment into wins. A rep with mostly Lost hours may need coaching on opportunity qualification before engaging technical resources.

Widget Filtering: Responds to all shared dashboard filters. When you click a bar in this chart, the By Interest and By Engineer charts update to show only data for the selected sales rep.

Drilldown: Click a sales rep's bar to filter the By Interest and By Engineer charts to that rep's opportunities. This lets you see which product lines a specific rep is pursuing and which engineers are supporting them.

Widget: Pre-Sales Time By Interest

Description: A horizontal stacked bar chart showing total pre-sales hours per interest (opportunity type or product line), with each bar divided into Active, Won, and Lost segments.

Data Source: Hours are grouped by the interest code on each opportunity, which typically represents the product line, service category, or business area.

Interpreting Widget: This chart reveals which areas of your business require the most pre-sales engineering investment. A product line with high total hours and a strong Won proportion is a healthy investment area. A product line with high hours but mostly Lost outcomes may warrant a review of the sales approach or competitive positioning for that offering.

Widget Filtering: Responds to all shared dashboard filters. Also updates when you click a sales rep in the By Rep chart.

Drilldown: Informational only - the By Rep chart drives the By Interest and By Engineer charts, not the other way around.

Widget: Pre-Sales Time By Engineer

Description: A horizontal stacked bar chart showing total pre-sales hours per engineer (the person who logged the time), with each bar divided into Active, Won, and Lost segments.

Data Source: Hours are grouped by the individual who recorded the time bill. Each engineer's bar shows how their pre-sales hours break down by opportunity outcome.

Interpreting Widget: Longer bars indicate engineers carrying more pre-sales load. If one engineer has disproportionately more hours than others, they may be at risk of burnout or may be the only resource with a specific skill set. Compare the Won proportion across engineers - an engineer consistently supporting winning deals may be a key differentiator in the sales process.

Widget Filtering: Responds to all shared dashboard filters. Also updates when you click a sales rep in the By Rep chart.

Drilldown: No drilldown. Informational only.

Widgets Relationship

The By Rep chart is the interactive hub. When you click a sales rep's bar, the By Interest and By Engineer charts filter to show only that rep's data. This lets you answer questions like "What product lines is this rep pursuing?" and "Which engineers are supporting this rep?" in one click.

The Trailing 12 Months chart operates independently - clicking it does not filter other charts, and clicking other charts does not filter it. It serves as a read-only trend reference.

All four charts share the same underlying data and filter context, so they always show consistent information when no interactive selection is applied.

Data Freshness

This dashboard pulls data each time it loads or is refreshed. Time bills recorded in Q360 will appear on this dashboard the next time you refresh the page. Changes to an opportunity's Won/Lost status will retroactively reclassify all time logged against that opportunity, which may cause historical chart segments to shift.

Frequently Asked Questions

Q: Why did hours I saw last month in the "Active" category now appear under "Won" or "Lost"?

A: The Active, Won, and Lost classifications are based on each opportunity's current Won/Lost code, not its code when back when hours were logged. When an opportunity's outcome changes, all historical hours retroactively move to the new category. This is by design - the dashboard shows the investment-to-outcome picture as it stands today.

Q: Does this dashboard track only "pre-sales engineering" specifically, or all time logged against opportunities?

A: It includes all time logged against opportunities, regardless of the time bill category. The name "Pre-Sales Engineering" reflects its primary use case, but if someone logs administrative, travel, or other non-engineering time against an opportunity, those hours will also appear. If your organization uses time bill categories (such as "Engineering" or "Admin"), you may be able to apply a category filter through the underlying report to isolate specific types of effort.

Q: Why does a sales rep not appear on the By Rep chart?

A: The chart shows only reps who have opportunities with time logged against them during the selected period. If a rep has opportunities but no one has logged time against them, that rep will not appear.

Q: Why are the chart totals slightly different from a detailed time report I ran separately?

A: Hours on the charts are rounded to whole numbers for display. Small differences between chart totals and detailed reports are due to this rounding. The underlying data is precise to two decimal places.

Related Dashboards

- **Sales Opportunities** - Shows the pipeline of active sales opportunities. Use Pre-Sales Engineering to understand the time investment, then Sales Opportunities to see the financial value and progression of those same opportunities.
- **Sales Dashboard** - Provides a per-rep view of sales activity including tasks and opportunities. The Pre-Sales Engineering dashboard adds the engineering dimension - how much technical support each rep is consuming.
- **Employee Utilization** - Shows how total employee time is allocated across projects, service calls, and administration. Pre-sales hours are a component of overall utilization. Use Pre-Sales Engineering for opportunity-specific detail, then Employee Utilization for the broader time allocation picture.
- **Sales Score Card** - Evaluates overall sales rep performance using a composite score. Pre-Sales Engineering adds context to score card results: a rep with high scores may or may not be efficiently using engineering resources.

Purchasing Dashboard

Path: Dashboards > Purchasing

Roles: Purchasing Managers, Finance Teams, Operations Leaders, and Executives who need visibility into procurement spending patterns, vendor concentration, and purchasing volume trends.

Permission: Dashboards menu plus permission to this dashboard.

Purpose

The Purchasing dashboard provides a comprehensive view of purchase order activity across the organization. It answers questions like:

- How much are we spending on purchasing this month, and how does it break down by buyer, department, and branch?
- Which vendors are receiving the most spend?
- Which manufacturers account for the largest purchasing volume?
- What are the top individual purchase orders by dollar amount?
- How has total purchasing volume, average purchase size, and number of purchase orders trended over the past twelve months?

The dashboard is organized into two data perspectives: a current-period detail view (showing line-item level spending by buyer, department, branch, vendor, manufacturer, and vendor type) and a twelve-month trend view (showing monthly purchase order volume, average order size, and total count).

Data Included

The detail view includes all non-cancelled purchase order line items within the selected date range (the default is the current month). Amounts are based on the original ordered quantity and price, not the quantity received - so a line item ordering 100 units at $10 each will always show $1,000, even if only 50 units have been received.

The twelve-month trend charts include purchase order headers (not individual line items) for the past twelve months, excluding cancelled orders. DATAENTRY-status orders are included in the trend charts when viewed on this dashboard.

The following are **not** included:

- Return merchandise authorization (RMA) type of purchase orders
- Cancelled purchase line items (in the detail view) or cancelled purchase orders (in the trend view)

Note: *The detail views and twelve-month trend charts use slightly different data sources. The detail views sum amounts at the line-item level, while the trend charts use the purchase order header subtotal. For the same time* *period, these two views may produce slightly different totals due to the different aggregation levels and the inclusion of DATAENTRY-status POs in the trend charts.*

Dashboard Filters

The main filters appear when you interact with the dashboard data:

Filter	Behavior	Default
Company	Narrows to a specific company (legal entity)	All companies
Branch	Narrows to a specific branch	All branches
Department	Narrows to a specific department	All departments
Date Range	Controls the time period for the detail views	Current month

The twelve-month trend charts always show the trailing twelve months and are not directly adjustable by the user.

Filters Sync

The Purchases By Vendor table is the primary filter driver. When you change Company, Branch, or Department on this widget, all six detail charts and tables update to reflect the same filters. These filter selections also cascade to the twelve-month trend charts, ensuring that organizational filters apply consistently across the entire dashboard.

Widgets

This dashboard is organized into three rows. The top row shows purchasing distribution charts (by buyer, department, and branch). The middle row shows twelve-month trends (total spend, average purchase size, and purchase order count). The bottom row shows detail tables (by vendor, by manufacturer, by vendor type, and top 20 purchases).

Widget: Purchasing By Buyer

Description: A horizontal bar chart showing total purchasing amounts per buyer.

Data Source: Each bar represents one buyer (the person who created the purchase orders) and shows the sum of all their purchase line-item amounts within the selected date range.

Interpreting Widget: Longer bars indicate buyers who have placed larger total orders. This helps identify who is responsible for the most procurement spend and whether purchasing authority is concentrated or distributed.

Widget Filtering: Updates when you change dashboard filters. Syncs with the Purchases By Vendor table.

Drilldown: Clicking a bar filters the other detail widgets to show only that buyer's purchases.

Widget: Purchasing By Department

Description: A vertical bar chart showing total purchasing amounts per department.

Data Source: Each bar sums the line-item amounts for purchase orders assigned to that department.

Interpreting Widget: Taller bars mean higher spend in that department. This helps identify which departments are driving procurement costs and can support budget-to-actual comparisons.

Widget Filtering: Updates with all dashboard filters.

Drilldown: Clicking a bar filters other detail widgets to that department.

Widget: Purchasing By Branch

Description: A horizontal bar chart showing total purchasing amounts per branch.

Data Source: Each bar sums the line-item amounts for purchase orders assigned to that branch.

Interpreting Widget: Compare bars across locations to identify which branches are spending the most on procurement. Combined with the By Department view, this helps pinpoint where organizational spending is concentrated.

Widget Filtering: Updates with all dashboard filters.

Drilldown: Clicking a bar filters other detail widgets to that branch.

Widget: Total Purchases - Last 12 Months

Description: A vertical bar chart showing total purchase order subtotals by month for the past twelve months.

Data Source: Each bar represents one calendar month and sums the purchase order header subtotals for all non-cancelled orders placed during that month.

Interpreting Widget: Rising bars indicate increasing procurement spend over time; declining bars indicate decreasing spend. Look for seasonal patterns (such as year-end purchasing spikes) and anomalies that may warrant investigation.

Widget Filtering: Receives Company, Branch, and Department filters from the detail view. Always shows twelve months.

Drilldown: Clicking on a month bar filters the Average Purchases and Total POs charts to that month.

Widget: Average Purchases - Last 12 Months

Description: A vertical bar chart showing the average purchase order subtotal per month for the past twelve months.

Data Source: For each month, this calculates the average subtotal across all non-cancelled purchase order headers.

Interpreting Widget: Rising average order size may indicate consolidation of purchases into fewer, larger orders. Declining averages may indicate smaller, more frequent purchases. Compare this alongside Total POs to distinguish between volume changes and size changes.

Widget Filtering: Syncs with the Total Purchases trend chart and receives organizational filters from the detail view.

Drilldown: No drilldown. Informational only.

Widget: Total POs - Last 12 Months

Description: A vertical bar chart showing the count of purchase orders per month for the past twelve months.

Data Source: Each bar counts the number of non-cancelled purchase order headers placed during that month.

Interpreting Widget: This shows purchasing transaction volume, independent of dollar amount. A spike in PO count without a corresponding spike in total spend suggests many small orders. A decrease in PO count with stable total spend suggests fewer, larger orders - often a sign of vendor consolidation.

Widget Filtering: Syncs with the Total Purchases trend chart and receives organizational filters from the detail view.

Drilldown: No drilldown. Informational only.

Widget: Purchases By Vendor

Description: A summary table showing total line-item amounts grouped by vendor name.

Data Source: This sums purchase line-item amounts (ordered quantity × unit price) for each vendor within the selected date range.

Interpreting Widget: The vendors at the top of the list have the highest total spend. This view is useful for vendor consolidation analysis, contract negotiation prioritization, and identifying spending concentration risks.

Widget Filtering: This is the master widget - changing filters here updates all other detail widgets.

Drilldown: Click a vendor row to filter all other detail widgets to that vendor's purchase orders.

Widget: Purchases By Manufacturer

Description: A summary table showing total line-item amounts grouped by manufacturer.

Data Source: Each purchase line item may have a manufacturer associated with it. This table sums amounts across all line items for each manufacturer.

Interpreting Widget: This shows which manufacturers (not necessarily the direct vendor) account for the most spend. Useful for understanding brand-level procurement patterns.

Widget Filtering: Updates with all dashboard filters. Syncs with the Purchases By Vendor table.

Drilldown: Click a manufacturer row to filter other widgets to orders involving that manufacturer.

Widget: Purchases By Vendor Type

Description: A summary table showing total line-item amounts grouped by vendor sub-type classification.

Data Source: Vendors in Q360 can be classified by type (such as distributor, manufacturer-direct, subcontractor, etc.). This table sums amounts for each type.

Interpreting Widget: This helps you understand the composition of your supply chain - for example, what percentage of spend goes to distributors versus direct manufacturers versus subcontractors.

Widget Filtering: Updates with all dashboard filters.

Drilldown: Click a type row to filter other widgets to that vendor classification.

Widget: Top 20 Purchases

Description: A summary table listing the twenty largest purchase orders by total line-item amount.

Data Source: This ranks individual purchase orders by their summed line-item amounts and displays only the top twenty.

Interpreting Widget: This highlights your largest individual procurement transactions. Use it to verify that major purchases are expected and approved, and to identify any unusually large orders that may need review.

Widget Filtering: Updates with all dashboard filters.

Drilldown: Click a purchase order number to open the full purchase order record in Q360 (you need purchase order viewing permission).

Widgets Relationship

The dashboard operates in two synchronized groups. The detail widgets (top row charts and bottom row tables) all share the same data and respond to the Purchases By Vendor table as the master filter. Click a vendor, buyer, department, or branch to filter the entire detail view.

The twelve-month trend charts form a second group. The Total Purchases chart drives the Average Purchases and Total POs charts. Organizational filters (Company, Branch, Department) cascade from the detail view to the trend view, keeping both perspectives aligned.

Data Freshness

The dashboard pulls data each time it loads or is refreshed. New purchase orders and line items will appear after they are entered in Q360 and the dashboard is refreshed. Amounts reflect the ordered quantity and price at the time of PO creation - subsequent receiving or invoicing activity does not change the amounts shown in the detail view.

Frequently Asked Questions

Q: Why do the "Total Purchases" numbers in the top detail view not match the "Total Purchases - Last 12 Months" trend chart?

A: The detail view sums line-item amounts (ordered quantity × unit price), while the trend chart sums purchase order header subtotals. These are calculated at different levels and may include different items. The detail view also defaults to the current month, while the trend chart shows twelve months. Even for overlapping periods, the two may differ slightly.

Q: Are DATAENTRY purchase orders included?

A: In the detail charts and tables (top and bottom rows), DATAENTRY-status POs appear as long as they have non-cancelled line items. In the twelve-month trend charts, DATAENTRY-status POs are included because the dashboard only excludes cancelled orders from the trend data.

Q: Does "Amount" represent what we received or what we ordered?

A: The amounts in the detail view represent what was ordered (ordered quantity × unit price), not what was received or invoiced. If a purchase order is partially received, the full ordered amount still appears. This means spend figures may overstate actual procurement costs for partially fulfilled orders.

Q: I see drop-ship orders in the data. Are they included?

A: Yes, drop-ship orders are included. A "Drop Ship" indicator is tracked in the underlying data, but the dashboard does not separate drop-ship from standard orders in its charts. All non-cancelled, non-RMA orders within the selected filters are shown.

Q: Can I drill into a specific purchase order from this dashboard?

A: Yes. In the detail view, click a purchase order number to open the full PO record in Q360. You can also click customer numbers, project numbers, and site numbers in the underlying data to navigate to those records.

Related Dashboards

- **Executive Dashboard** - Includes a high-level purchasing gauge showing total spend as part of the cross-functional summary.
- **Project Overview -** When purchase orders are linked to projects, the Project Overview shows the resulting costs at the project level. Use Purchasing to understand vendor-level spend, then Project Overview to see how that spend affects project profitability.
- **Cash Position** - Purchasing activity affects accounts payable and ultimately cash flow. Use the Cash Position dashboard to see the cash impact of procurement commitments.
- **Cash Forecast** - Purchase commitments flow into the cash forecast. Review both dashboards together for a complete picture of how purchasing decisions affect future cash availability.

Employee Utilization Dashboard

Path: Dashboards > BI Data > Employee Utilization

Roles: Operations Managers, Department Heads, Branch Managers, Executives, and anyone responsible for workforce planning and resource allocation.

Permission: Dashboards menu plus permission to this dashboard.

Purpose

The Employee Utilization dashboard shows how your workforce's time is being allocated - and whether your people are being effectively utilized. It answers questions like:

- What is our overall utilization rate this month?
- How does current utilization compare to last month?
- How have available hours versus booked hours trended over the past twelve months?
- How is booked time split between service call work, project work, and administrative tasks?
- Which branches and departments have the highest and lowest utilization rates?

The dashboard presents utilization data at two time horizons: the current month and the last twelve months. This lets you see both the immediate state and the broader trend, making it useful for both operational check-ins and strategic workforce planning.

Data Included

This dashboard draws from Q360's pre-aggregated employee utilization data, which tracks daily snapshots of each employee's available hours, booked hours, and how those booked hours break down by type (service call, project, and administration). The data includes all employees whose labor type is tracked in the utilization system.

The following are **not** included:

- Contractors, temporary workers, or other non-employee resources (unless they are classified under a labor type in the utilization system - check your organization's configuration)
- Pre-aggregated monthly summary records (the dashboard uses daily snapshot data and re-aggregates it, ensuring no double-counting)

Dashboard Filters

The following filters are configured at the dashboard level:

Filter	Behavior	Default
Company	Narrows to a specific company (legal entity)	All companies
Branch	Narrows to a specific branch	All branches
Department	Narrows to a specific department	All departments
Labor Type	Narrows to a specific employee labor type	All labor types

Each widget group has its own fixed default time period:

- The Current Month gauge uses the current calendar month
- The twelve-month trend charts use the last twelve months
- The Last Month detail charts use the previous calendar month

Filters Sync

The Current Month utilization gauge on the upper left acts as the filter source. When you change Company, Branch, Department, or Labor Type on this gauge, those selections propagate to the twelve-month trend charts and the last-month detail charts. This keeps all three time horizons aligned on the same organizational scope.

The time period for each widget group is independent - the current-month gauge always shows the current month, the trend charts always show twelve months, and the detail charts always show last month. This is intentional: it gives you a current reading, a historical trend, and a recent-period comparison all on one screen.

Widgets

The dashboard is organized into two rows. The top row shows the current-month utilization gauge, a twelve-month trend of available versus booked hours, and a last-month utilization comparison by branch. The bottom row shows the last-month utilization gauge, a twelve-month trend of how booked hours break down by type, and a last-month utilization comparison by department.

Widget: Utilization Gauge - Current Month

Description: A linear gauge on the left showing the overall utilization percentage for the current month.

Data Source: Calculated as (total booked hours ÷ total available hours) × 100 for all employees matching the current filters during the current month.

Interpreting Widget: The gauge ranges from 0% to 100% with three color zones: red (0–33%) indicates low utilization - your workforce has significant idle capacity. Yellow (33–66%) indicates moderate utilization. Green (66–100%) indicates strong utilization - most available time is being productively used.

Widget Filtering: Responds to Company, Branch, Department, and Labor Type filters. This widget acts as the filter source for other widgets.

Drilldown: No drilldown. Informational only.

***Note:** If employees work overtime, booked hours can exceed available hours, potentially producing a utilization rate above 100%. The gauge is designed for the 0–100% range, so values above 100% may display differently depending on your Q360 version.*

Widget: Available vs. Booked - Last 12 Months

Description: A grouped bar chart showing two bars per month - one for available hours (teal) and one for booked hours (dark gray) - for each of the last twelve months.

Data Source: For each month, the chart sums all employees' available hours and booked hours from the daily utilization snapshots.

Interpreting Widget: When the dark (booked) bars closely approach the teal (available) bars, utilization is high. A persistent gap between the two indicates unused capacity. Look for seasonal patterns - many organizations see dips around holidays or fiscal year transitions and peaks during busy project seasons.

Widget Filtering: Receives Company, Branch, Department, and Labor Type filters from the current-month gauge.

Drilldown: Clicking a month in this chart filters the Call vs. Project vs. Admin chart below to the same data context.

Widget: Utilization Rate By Branch - Last Month

Description: A horizontal bar chart showing the utilization percentage for each branch during the previous month.

Data Source: For each branch, calculated as (total booked hours ÷ total available hours) × 100 for last month.

Interpreting Widget: Longer bars mean higher utilization at that branch. Compare branches to identify locations that may be overstaffed (low utilization) or overworked (very high utilization). Branches with no utilization data for the period will not appear on the chart, so an absent branch does not necessarily mean zero utilization - it may mean the data has not been recorded for that location.

Widget Filtering: Receives Company, Branch, Department, and Labor Type filters from the current-month gauge.

Drilldown: Clicking a branch bar filters the last-month utilization gauge and the department chart below to that branch's data.

Widget: Utilization Gauge - Last Month

Description: A linear gauge showing the overall utilization percentage for the previous month. Same design and color thresholds as the current-month gauge.

Data Source: Same calculation as the current-month gauge, but using last month's data.

Interpreting Widget: Compare this to the current-month gauge above to see whether utilization is trending up or down. If last month was green and the current month is yellow, investigate what changed - did available hours increase (new hires), or did booked hours decrease (project completions, slow period)?

Widget Filtering: Syncs with the Branch utilization chart - when you click a branch, this gauge updates to show that branch's utilization.

Drilldown: No drilldown. Informational only.

Widget: Call vs. Project vs. Admin - Last 12 Months

Description: A stacked bar chart showing how booked hours break down each month across three categories: admin hours (red), call hours (dark gray), and project hours (teal).

Data Source: For each month, the chart sums three separate hour types from the daily utilization snapshots: time spent on administrative tasks, time spent on service calls, and time spent on projects.

Interpreting Widget: The total height of each stacked bar represents the total booked hours for that month (similar to the booked bar in the Available vs. Booked chart). The segments show where that time went. A healthy balance depends on your organization's business model. A project-focused company should see project hours dominating. A service-focused company should see call hours dominating. A large admin component may indicate opportunities to redirect time toward revenue-generating work.

Widget Filtering: Syncs with the Available vs. Booked chart and receives organizational filters from the current-month gauge.

Drilldown: No drilldown. Informational only.

Important: *The sum of admin, call, and project hours may not exactly equal the total booked hours shown in the Available vs. Booked chart. Other hour categories (such as pre-sales time or unclassified time) may be included in total booked hours but not represented in the three visible segments. If you notice a gap, it indicates booked time that does not fall into the admin, call, or project buckets.*

Widget: Utilization Rate By Department - Last Month

Description: A horizontal bar chart showing the utilization percentage for each department during the previous month.

Data Source: For each department, calculated as (total booked hours ÷ total available hours) × 100 for last month.

Interpreting Widget: Compare departments side by side to identify utilization imbalances. Departments with very low utilization may have excess capacity that could be redirected to busier departments. Departments with very high utilization may need additional resources.

Widget Filtering: Syncs with the Branch utilization chart - when you click a branch in the Branch chart, this department chart updates to show only departments within that branch.

Drilldown: No drilldown. Informational only.

Widgets Relationship

The dashboard is organized into two paired rows:

Top row: The Current Month gauge sets the organizational filters. The Available vs. Booked trend provides twelve-month context. The Branch utilization chart shows last month's comparison across locations.

Bottom row: The Last Month gauge provides a single-number summary for the prior month. The Call vs. Project vs. Admin chart shows how booked time is composed over twelve months. The Department utilization chart shows last month's comparison across functional areas.

Clicking a branch in the top-right chart filters both the bottom-left gauge and the bottom-right department chart to that branch. This lets you quickly drill from "which branches are under-utilized?" to "which departments within that branch are contributing to the gap?"

Clicking a month in the Available vs. Booked chart filters the Call vs. Project vs. Admin chart to that month's data context.

Data Freshness

This dashboard draws from pre-aggregated daily utilization snapshots. These snapshots are generated by a nightly data process. When you view the dashboard, you are seeing data as of the most recent completed data process run, which is typically the previous business day. Real-time time entries made today will not appear until the next nightly process completes.

There is no indicator on the dashboard showing when the data was last refreshed. If you suspect the data is stale (for example, a recent time entry is not reflected), check with your Q360 administrator to confirm the data process is running on schedule.

Frequently Asked Questions

Q: What does "utilization" actually measure?

A: Utilization is calculated as booked hours divided by available hours, expressed as a percentage. Booked hours are the total hours employees have recorded (working on projects, service calls, or administrative tasks). Available hours represent the time employees were scheduled to work. The ratio tells you what percentage of available time was productively used.

Q: A branch that I know has employees is missing from the Branch utilization chart. Why?

A: If a branch has no utilization data recorded for the selected period, it will not appear on the chart. This could mean the data process has not captured data for that branch, or all employees at that branch were on leave during the period. The chart only shows branches with recorded data.

Q: The admin, call, and project hours do not add up to the total booked hours. Where are the missing hours?

A: The three visible categories (admin, call, project) may not account for all booked time. Other categories, such as pre-sales time, training, or unclassified hours, may exist in your data but are not shown as separate segments on this chart. The gap represents booked time that falls outside the three displayed categories.

Q: Can I see utilization for individual employees?

A: This dashboard shows utilization at the organizational level (by branch and department), not at the individual employee level. For individual-level detail, you would need to run a report from Q360's reporting tools or check with your Q360 administrator about available employee-level reports. For a per-employee view of admin versus billable time by department, see the Time Bill By Employee Summary dashboard.

Q: What is a good utilization target?

A: This varies by industry, business model, and role. Many professional services organizations target 65–80% utilization for billable staff, leaving room for administrative tasks, training, and PTO. The dashboard's color thresholds (red below 33%, yellow 33–66%, green above 66%) provide a general guideline, but your organization's targets should be set by leadership based on your specific business context.

Related Dashboards

- **Executive Dashboard** - Includes a high-level employee headcount gauge. Start there for a quick check on workforce size, then come to Employee Utilization for the detailed time allocation view.
- **HR Overview** - Shows who is on the team - headcount, demographics, and organizational distribution. Use HR Overview to understand workforce composition, then Employee Utilization to understand how that workforce is spending its time.
- **Project Overview** - Shows the financial health of the project portfolio. Employee Utilization's project hours are the labor component of the costs that appear on the Project Overview. If project costs are running high, check Employee Utilization to see whether project hours are driving the overrun.

- **Pre-Sales Engineering** - Shows time invested in sales opportunities specifically. Pre-sales hours may be a subset of the total booked hours shown on Employee Utilization. Use Pre-Sales Engineering for opportunity-level detail.
- **Time Bill By Employee Summary** - Shows the raw admin-versus-billable percentage split for each employee. While Employee Utilization shows utilization as an efficiency ratio, Time Bill By Employee Summary provides a direct visual of how each person's total hours break down between internal and customer work.

Service Dashboards

These dashboards help service managers, dispatch teams, and leadership monitor open and closed service calls, track resolution patterns, and review call activity across the organization. Together, they provide a complete view of service operations - from the moment a call is opened through dispatch, resolution, closure, and trend analysis.

The three dashboards in this section serve distinct purposes. Service Call Open is your real-time workload monitor: it shows every active call and how they are distributed across technicians, priorities, age groups, and geographies. Service Call Closed is your retrospective analysis tool: it shows recently closed calls and their distribution, plus a twelve-month trend of average response times. Call Activity is designed for your customers: it gives external users (accessing Q360 through the Customer Portal) a self-service view of their own active calls, recent events, and monthly trends.

Used together in weekly service meetings, the Open and Closed dashboards help you answer the questions that drive service excellence: How many calls are we juggling right now? Are any aging beyond acceptable limits? Who is closing the most calls? Is our response time improving or declining? The Call Activity dashboard extends that visibility to your customers, reducing inbound status inquiries.

Service Call Open Dashboard

Path: Dashboards > Service > Service Call Open

Roles: Service Managers, Dispatchers, Support Team Leads, and anyone responsible for monitoring active service call workload and distribution.

Permission: Dashboards menu plus permission to this dashboard. To click through to individual service call records, you need call viewing permission.

Purpose

The Service Call Open dashboard provides a real-time snapshot of all open (active) service calls across the organization. It answers questions like:

- How many service calls are currently open?
- How are open calls distributed by age - how many are new versus aging?
- Which technicians are carrying the heaviest workload?
- How are calls distributed by priority, call type, CSR, zone, branch, problem code, and status?
- Which specific calls need attention?

Data Included

This dashboard shows all service calls that are currently in an active status. In Q360, a call's status (such as OPEN, DISPATCHED, SCHEDULED, or TOSCHEDULE) determines whether it is considered active. Any call whose status is classified as active by your organization's Q360 general codes configuration will appear on this dashboard.

The following are **not** included:

- CLOSED or COMPLETED calls (these appear on the Service Call Closed dashboard)
- Calls whose status has been explicitly classified as POST in call status general code

Important: *The default view shows all active calls with no date filter applied. The date range filters visible on the screen have no effect when the Data Type is set to "Active" (which is the default). This is intentional - active calls should be visible regardless of their age. If you want to view calls by date range, you would need to change the Data Type setting to view closed or all calls.*

Dashboard Filters

Filter	Behavior	Default
Company	Narrows to a specific company (legal entity)	All companies
Branch	Narrows to a specific branch	All branches
Department	Narrows to a specific department	All departments
Call Type	Controls which call (sale) types are shown	All types

Filters Sync

The Service Calls data grid is the central hub. All ten chart and gauge widgets are synchronized to this grid. When you click on any chart element - a bar, a pie slice, or a gauge - the data grid immediately filters to show only the matching calls. The gauge updates its count, and all other charts adjust to reflect the same filtered data.

This means the dashboard supports interactive exploration: click an age group to see old calls, then click a technician to narrow further, building up a multi-dimensional filter to find exactly the calls you need.

Widgets

This dashboard contains eleven widgets: a gauge showing the total count of open calls, a data grid listing every active call, and nine charts breaking down call distribution across different dimensions.

Widget: Open Calls (Gauge)

Description: A radial gauge displaying the total count of currently open service calls.

Data Source: This counts every active service call returned by the data source.

Interpreting Widget: The number in the center tells you how many calls are active right now. The gauge scale runs from 0 to 1,000. The gauge uses a single teal color across all ranges - it is purely informational and does not use warning colors. If your organization frequently exceeds 1,000 open calls, the number will still display correctly but the visual scale will be maxed out.

Widget Filtering: Updates automatically when you click on any chart element to filter the dashboard. Shows the count of calls matching the current interactive selection.

Drilldown: No drilldown. Informational only.

Widget: Calls By Age Group

Description: A vertical bar chart showing how many open calls fall into each age bracket: 0–30 days, 31–60 days, 61–90 days, and 91+ days.

Data Source: Each call's age is calculated from the day it was opened to today. The system recalculates ages every time the dashboard loads, so calls naturally move between brackets over time.

Interpreting Widget: A large bar in the 91+ bracket signals a backlog of aging calls that may need escalation or management attention. A large bar in 0–30 days is normal and indicates recent intake. If you see a bar labeled "Other," it represents calls with unusual dates (such as a future open date from a data entry error).

Widget Filtering: Syncs with the data grid. Click a bar to filter the grid and all other charts to calls in that age group.

Drilldown: Click any age bracket bar to filter the entire dashboard to calls in that bracket.

Widget: Calls By CSR (Top 5)

Description: A pie chart showing the top five CSRs by number of assigned open calls.

Data Source: Groups calls by their assigned CSR and counts how many each person has.

Interpreting Widget: Larger slices indicate CSRs handling more open calls. If one CSR has a disproportionately large slice, they may be overloaded.

Widget Filtering: Click a slice to filter the grid and other charts to that CSR's calls.

Drilldown: Click any slice to filter the dashboard to that CSR.

Widget: Calls By Call Type (Top 5)

Description: A pie chart showing the top five call types by number of open calls.

Data Source: Groups calls by their call type and counts each.

Interpreting Widget: The dominant call types tell you what kinds of issues your team is handling most. This can inform staffing, training, and knowledge base priorities.

Widget Filtering: Click a slice to filter the dashboard to that call type.

Drilldown: Click any slice to filter.

Widget: Calls By Priority

Description: A pie chart showing the distribution of open calls across priority levels.

Data Source: Groups calls by their assigned priority value.

Interpreting Widget: A concentration of calls at high priority may signal a systemic issue or an outage affecting multiple customers. Priority distribution helps dispatchers allocate technician time appropriately.

Widget Filtering: Click a slice to filter the dashboard to that priority.

Drilldown: Click any slice to filter.

Widget: Calls By Zone

Description: A pie chart showing how open calls are distributed across geographic zones.

Data Source: Groups calls by the zone of the customer site where the call originated.

Interpreting Widget: Zones with more calls may need additional technician coverage or regional support.

Widget Filtering: Click a slice to filter.

Drilldown: Click any slice to filter.

Widget: Calls By Branch

Description: A vertical bar chart showing the number of open calls per branch.

Data Source: Groups calls by the branch responsible for the call.

Interpreting Widget: Taller bars mean more open calls at that branch. Compare branches to assess relative workload and staffing needs.

Widget Filtering: Click a bar to filter.

Drilldown: Click any bar to filter the dashboard to that branch.

Widget: Calls By Tech

Description: A horizontal bar chart showing the number of open calls assigned to each technician.

Data Source: Groups calls by the assigned technician. If no technician is assigned, the call is attributed to the CSR.

Interpreting Widget: Longer bars indicate technicians carrying more calls. This is essential for workload balancing - if one technician has twenty open calls while another has five, dispatchers should consider redistributing.

Widget Filtering: Click a bar to filter.

Drilldown: Click any bar to filter the dashboard to that technician's calls.

Widget: Calls By Problem Code

Description: A horizontal bar chart showing the number of open calls per problem code.

Data Source: Groups calls by their assigned problem code.

Interpreting Widget: Problem codes with tall bars indicate recurring issues. This chart is valuable for root-cause analysis - if one problem code dominates, there may be a systemic product or service issue that needs a proactive fix rather than reactive call resolution.

Widget Filtering: Click a bar to filter.

Drilldown: Click any bar to filter.

Widget: Calls By Status

Description: A horizontal bar chart showing the number of open calls in each status (such as OPEN, DISPATCHED, SCHEDULED, TOSCHEDULE).

Data Source: Groups calls by their current status code.

Interpreting Widget: Calls in "OPEN" or "TO SCHEDULE" status have not yet been dispatched and may need dispatch attention. Calls in "DISPATCHED" or "SCHEDULED" status are actively being worked. A large number of calls stuck in a pre-dispatch status may indicate a bottleneck in the dispatch process.

Widget Filtering: Click a bar to filter.

Drilldown: Click any bar to filter.

Widget: Service Calls (Data Grid)

Description: A detailed table listing every active service call, showing columns such as Call Number, Date, Priority, Status, Customer, Site, Technician, CSR, Branch, Problem Code, Zone, and various date and time metrics.

Data Source: This is the complete list of active service calls matching the current filters.

Interpreting Widget: Scan the list for calls that need attention - old calls, high-priority calls, or calls with no technician assigned. Click column headers to sort by any dimension.

Widget Filtering: This is the master widget. All chart clicks filter this grid, and this grid's data drives all charts and the gauge.

Drilldown: Click a Call Number to open the full dispatch record in Q360, where you can view complete call details, transaction history, and take action on the call.

Widgets Relationship

All charts and the gauge are synchronized to the data grid. This creates a powerful interactive analysis tool:

1. **Click any chart element** (a bar, a pie slice, or the gauge) to filter the data grid and all other charts to matching calls.
2. **Stack multiple filters** by clicking elements on different charts sequentially. For example, click "91Plus" in the Age Group chart, then click a specific technician - the grid now shows only aging calls assigned to that person.
3. **Reset filters** by refreshing the dashboard or navigating away and back.

This interactive model lets dispatchers and service managers drill from high-level distribution down to the specific calls that need attention, all without leaving the dashboard.

Data Freshness

This dashboard pulls data each time it loads or is refreshed. It reflects the current state of all active service calls - status changes, reassignments, and new calls all appear immediately upon refresh. Call ages recalculate automatically based on today's date each time the dashboard loads.

Frequently Asked Questions

Q: A call was closed this morning but still appears on the dashboard. Why?

A: The call's status in Q360 may not have been updated yet. Once the status is changed to a CLOSED state and the dashboard is refreshed, the call will disappear from this view and appear on the Service Call Closed dashboard instead.

Q: Why does the same call sometimes appear in a different age bracket when I check the next day?

A: Call ages are recalculated every time the dashboard loads based on today's date. A call that was 30 days old yesterday (in the 0–30 bracket) will be 31 days old today (in the 31–60 bracket). This is normal and expected.

Q: The gauge shows a count but several charts seem to have different totals. Why?

A: If you have clicked on a chart element to apply a filter, the gauge and all charts will show the filtered count, not the total. Refresh the dashboard to clear all interactive filters and see the complete count.

Q: Can I filter by branch or department from this dashboard?

A: Branch and department filters are not exposed on this dashboard by default, although the underlying report supports them. Ask your Q360 administrator to add these filters or access the Service Calls report directly for branch-level or department-level filtering.

Q: What does it mean when a technician's bar shows a blank name?

A: A blank name means no technician has been assigned to those calls (and no CSR is assigned either). These calls may need dispatch attention to assign an appropriate resource.

Related Dashboards

- **Service Call Closed** - Shows recently closed calls and resolution patterns. Use Service Call Open to monitor current workload, then Service Call Closed to analyze what has been completed and how response times are trending.
- **Call Activity** - Provides a customer-facing view of call status through the Customer Portal. While Service Call Open is for internal teams, Call Activity gives your customers self-service visibility.
- **Executive Dashboard** - Includes a high-level open call count and priority distribution. Start there for a quick service health check, then come to Service Call Open for full operational detail.
- **Employee Utilization** - Shows how technician and CSR time is being spent. If technicians are showing high utilization on Employee Utilization but open calls are growing here, you may need additional service staff.

Service Call Closed Dashboard

Path: Dashboards > Service > Service Call Closed

Roles: Service Managers, Service Directors, and operations leaders responsible for reviewing completed work, analyzing resolution patterns, and tracking dispatch response time performance.

Permission: Dashboards menu plus permission to this dashboard. If you click through to an individual service call record from the summary table, you will need Service Call View permission.

Purpose

The Service Call Closed dashboard provides a visual summary of service calls that have been completed (closed) within a selected time period. It answers questions like:

- How many calls were closed last month, and what types of calls were they?
- How is response time trending over the past 12 months?
- Which technicians are closing the most calls?
- How does closed-call volume compare across branches and zones?
- Which customers generated the most closed calls, and what types of issues did they have?

This dashboard is designed for retrospective analysis - reviewing what has been completed and how efficiently the service team is operating. For monitoring currently open calls, use the Service Call Open dashboard instead.

Data Included

This dashboard shows **closed service calls only**. A call is considered "closed" based on its current status in Q360 - specifically, calls whose status code is classified as a post-completion status (such as Closed, Completed, or Invoiced). The exact statuses that qualify as closed depend on your organization's configuration of service call status codes.

The following are **not** included:

- Active or open service calls, regardless of their age
- Calls that were closed but have since been reopened - if a call's status is changed back to an active status, it will no longer appear on this dashboard
- Calls with a close date outside the selected date range

Important: The dashboard has two distinct time windows operating simultaneously:

- The **pie chart and detail charts** (call type, technician, branch, zone, and customer summary) default to **Last Month**, showing calls closed within the most recent calendar month.

- The **response time trend chart** defaults to **Last 12 Months**, showing average response time by month over a full year.

This means some widgets may show different volumes of data at any given time, which is by design - one view provides a focused snapshot of recent closures, while the other provides a broader performance trend.

Dashboard Filters

Filter	Behavior	Default
Company	Narrows to a specific company (legal entity)	All companies
Branch	Narrows to a specific branch	All branches
Department	Narrows to a specific department	All departments
Call Type	Controls which call (sale) types are shown	All types
Time Period	Controls which closed calls are included in the pie chart and its linked detail charts. You can select a preset period or enter custom dates.	Last Month

The response time trend chart operates on its own fixed 12-month window and does not have a separate user-selectable filter. However, if your Q360 administrator changes the branch, company, department, or call type filters on the pie chart, those changes automatically carry over to the response time chart as well, keeping both views aligned on the same organizational scope.

Filters Sync

The **Calls Closed By Call Type** pie chart is the primary control widget on this dashboard. When you click a slice on the pie chart (for example, a specific call type), the following widgets automatically filter to show only calls matching that call type:

- Calls Closed By Tech
- Calls Closed By Branch
- Calls Closed By Zone
- Call Count by Customer (summary table)

The **Avg. Response Time** bar chart is not directly synchronized to the pie chart's click interactions, but its organizational filters (branch, company, department, and call type) are linked to the pie chart's filter settings. This means if an administrator adjusts those filter parameters, both views stay aligned.

Widgets

This dashboard contains six widgets arranged in three rows. The top row contains the response time trend chart (left) and the call type pie chart (right). The middle row shows three horizontal bar charts comparing technicians, branches, and zones. The bottom row presents a summary table of call counts by customer.

Widget: Calls Closed By Call Type (Top 5)

Description: A pie chart showing the five most common call types among closed service calls for the selected period (default: Last Month). Each slice represents a different call type, and the size of each slice shows how many calls of that type were closed relative to the total.

Data Source: The chart groups all closed calls by their call type and counts how many fall into each group. Only the top five call types by volume are displayed. If your organization has more than five call types, the remaining types are not shown individually - the chart focuses on the highest-volume categories.

Interpreting Widget: The largest slice represents the call type with the most closures during the period. This helps you quickly identify which types of service issues are being resolved most frequently, which can inform staffing, training, and process improvement decisions.

Widget Filtering: This widget uses the Date Range filter (default: Last Month). It shows only calls with a close date falling within the selected period.

Drilldown: Click any slice to filter the technician, branch, zone, and customer summary widgets below to show only calls of that call type. This lets you drill into a specific type of issue and see who handled it, where it was handled, and which customers were affected.

Widget: Avg. Response Time (Business Hrs) - Last 12 Months

Description: A vertical bar chart showing the average response time in business hours for closed service calls, grouped by the month in which they were closed. Each bar represents one month, and the bar height shows the average response time for calls closed during that month.

Data Source: For each closed call, Q360 records how long it took from when the call was opened to when a technician was first dispatched, measured in business hours. This chart averages that value across all calls closed in each month.

Interpreting Widget: Taller bars indicate months where it took longer, on average, to dispatch a response after a call was opened. Shorter bars indicate faster response. Look for trends: a gradually increasing bar height may signal growing workload or staffing constraints, while a decreasing trend suggests operational improvements.

Important - Response Time vs. Resolution Time: *The response time shown here measures the time from call creation to first dispatch - it is* ***not*** *the total time to resolve and close the call.*

Widget Filtering: This widget always shows the last 12 months of data. It does not change when you adjust the Date Range filter or click the pie chart. However, its organizational filters (branch, company, department, and call type) are linked to the pie chart's filter settings, so both views stay aligned on the same scope.

Drilldown: No drilldown. Informational only.

Widget: Calls Closed By Tech

Description: A horizontal bar chart showing how many service calls each technician closed during the selected period. Each bar represents one technician, and the bar length shows their number of closed calls.

Data Source: Each closed call is attributed to the technician currently assigned to it. If no technician is assigned, the system uses the CSR who handled the call instead. The chart counts calls per person.

Interpreting Widget: Longer bars indicate technicians who closed more calls during the period. This view helps managers assess workload distribution, identify top performers, and spot potential imbalances in call assignment.

Important - Final Assignment Only: *If a call was reassigned from one technician to another during its lifecycle, only the* ***final*** *technician (the one assigned when the call was closed) receives credit. Previous technicians who worked on the call are not reflected here.*

Widget Filtering: This widget is synced to the Calls Closed By Call Type pie chart. It uses the same date range (default: Last Month) and updates when you click a call type slice on the pie chart.

Drilldown: No drilldown. Informational only.

Data Quality Note: If you see a bar with a blank name, it represents calls where neither a technician nor a CSR was assigned. These records may need attention to ensure proper assignment tracking.

Widget: Calls Closed By Branch

Description: A horizontal bar chart showing how many service calls were closed by each branch (office location) during the selected period. Each bar represents one branch, and the bar length shows the number of calls closed.

Data Source: Each closed call is associated with the branch responsible for handling it. The chart counts calls per branch.

Interpreting Widget: Longer bars indicate branches that closed more calls. This view helps management compare service activity across locations and identify branches that may need additional resources or are underperforming relative to their call volume.

Widget Filtering: This widget is synced to the Calls Closed By Call Type pie chart. It uses the same date range (default: Last Month) and updates when you click a call type slice on the pie chart.

Drilldown: No drilldown. Informational only.

Widget: Calls Closed By Zone

Description: A horizontal bar chart showing how many service calls were closed in each geographic zone during the selected period. Each bar represents one zone, and the bar length shows the number of calls closed.

Data Source: Each closed call is linked to the zone of the customer site where the service was performed. The chart counts calls per zone.

Interpreting Widget: Longer bars indicate zones with higher closure volumes. This view helps identify geographic patterns - for example, zones with disproportionately high or low closure rates relative to their customer base, which may warrant staffing adjustments or service delivery review.

Widget Filtering: This widget is synced to the Calls Closed By Call Type pie chart. It uses the same date range (default: Last Month) and updates when you click a call type slice on the pie chart.

Drilldown: No drilldown. Informational only.

Widget: Call Count by Customer

Description: A summary table showing the number of closed service calls grouped by customer (company name), with columns breaking down the count by call type. Each row is a customer, and each column is a call type. The cells show how many calls of each type were closed for that customer.

Data Source: The table uses the same closed-call data as the other widgets, grouped by customer company name and sub-grouped by call type.

Interpreting Widget: Use this table to identify which customers generated the most closed calls and what types of issues they experienced. A customer with a high volume of a specific call type may benefit from proactive outreach, training, or a review of their service agreement.

Widget Filtering: This widget is synced to the Calls Closed By Call Type pie chart. It uses the same date range (default: Last Month) and updates when you click a call type slice on the pie chart.

Drilldown: No drilldown. Informational only.

Widgets Relationship

The six widgets on this dashboard form two groups:

1. **The pie chart group** (five widgets): The Calls Closed By Call Type pie chart controls the technician, branch, zone, and customer summary widgets. Click any slice on the pie chart to filter all four of those widgets to show only calls of the selected type. This lets you start with a high-level view of what types of calls were closed and then drill into the details of who handled them, where, and for which customers.
2. **The response time chart** (one widget): The Avg. Response Time chart operates on its own 12-month window and is not affected by clicking the pie chart. However, its organizational scope (branch, company, department, and call type) stays aligned with the pie chart's filter settings.

A typical workflow: You notice the "Break/Fix" slice is unusually large in the pie chart. You click it, and the technician chart instantly filters to show which technicians closed the most break/fix calls. The branch chart shows where those calls were concentrated. The customer summary shows which customers had the most break/fix issues. Meanwhile, the response time chart continues to show the 12-month trend, giving you context on whether dispatch efficiency has been improving or declining.

Data Freshness

This dashboard loads data each time it opens or is refreshed. It does not update in real time as call statuses change.

If a call was just closed in Q360, it will appear on this dashboard the next time you refresh the page. There is no delay beyond the time it takes to reload.

Frequently Asked Questions

Q: Why does the pie chart show different data than the bar charts below it?

A: The pie chart defaults to "Last Month," and the detail charts (technician, branch, zone, customer) are synced to it, so they should show the same data. If they appear different, you may have clicked a pie chart slice to apply a filter. Refresh the dashboard to reset all filters.

Q: What is the difference between response time and resolution time?

A: Response time (shown on this dashboard) measures how long it took to dispatch a technician after a call was opened, counted in business hours. Resolution time would measure the total time from call opening to call closure - that metric is not displayed on this dashboard.

Q: A call was reopened after it was closed. Will it still appear here?

A: No. If a call's status is changed back to an active status, it will no longer appear on this dashboard because it is no longer considered closed. If the call is later re-closed with a new close date, it will reappear in the period corresponding to the new close date.

Q: Why does the response time chart show 12 months of data while the other charts show only one month?

A: This is by design. The response time chart provides a longer-term trend view for performance analysis, while the other charts focus on the most recent month for operational review. The two time windows complement.

Q: I see a technician's name I don't recognize. What does that mean?

A: The technician name comes from the call's assignment field. If no technician was assigned, the system uses the CSR who handled the call. If the name is unfamiliar, it may be a CSR or a technician who has since left the organization but was the last person assigned when the call was closed.

Q: Can I see calls closed more than one month ago?

A: Yes. Change the Date Range filter above the pie chart to a different period (such as "Last Quarter" or a custom date range). The pie chart and all synced widgets will update to reflect the new time period.

Q: Why does the customer summary table show a customer with zero calls for some call types?

A: The table only shows call types that have at least one closure across all customers. If a customer had no calls of a particular type during the period, their cell for that column will be empty or zero. This is expected.

Q: Some calls show a very high response time. Is that an error?

A: Not necessarily. Response time is measured in business hours from call creation to first dispatch. If a call sat in a queue for several days before being dispatched, the response time will be high. Investigate those calls individually to determine whether the delay was operational (backlog, staffing) or a data entry issue.

Related Dashboards

- **Service Call Open** - Shows currently open and active service calls. Use Service Call Open to monitor what needs attention now, then Service Call Closed to review what has been completed and how the team performed.
- **Call Activity** - Provides a customer-facing view of service call status through the Customer Portal. Service Call Closed is for internal analysis; Call Activity gives your customers self-service visibility.
- **Executive Dashboard** - Includes a high-level summary of service metrics. Start there for a quick health check, then come to Service Call Closed for detailed resolution analysis.
- **Employee Utilization** - Shows how technician time is being allocated. Compare with Service Call Closed to understand whether high closure volumes correlate with high utilization.

Call Activity Dashboard

Path: Dashboards > Call Activity (Customer Portal)

Roles: External users (customers) who access Q360 through the Customer Portal. This dashboard is designed for customers to self-monitor their service call activity without needing to contact the service desk directly.

Permission: This dashboard is available to external (Customer Portal) users who have been granted access by your Q360 administrator. If you are an external user and do not see this dashboard, ask your Q360 administrator to grant your account access to the Call Activity dashboard and to ensure it's set as your homepage.

Note for internal users: *This dashboard is specifically designed for the customer-facing portal experience. Internal service teams should use the Service Call Open and Service Call Closed dashboards for operational management. If you are an internal user viewing this dashboard, you will see the same layout your customers see.*

Purpose

The Call Activity dashboard gives customers a self-service window into their service relationship with your organization. It answers questions like:

- What service calls do I currently have open?
- What has happened recently on my calls - any new notes, status changes, or emails?
- How has my call volume trended over the past year - are we opening more calls than we are closing?

This dashboard is intentionally simple, with three independent widgets that each address a different aspect of a customer's service experience. It reduces the need for customers to call or email for status updates by putting the information directly in front of them.

Data Included

Each widget on this dashboard shows only data that belongs to the logged-in customer. The system automatically identifies the customer based on the portal login credentials - no manual filtering is needed.

- **Active Calls**: Shows all currently open service calls for the customer, regardless of when they were opened.
- **Recent Events**: Shows dispatch activity notes and related emails from the **last 7 days** only. Only notes that have been marked as public (visible to customers) are shown - internal notes are not included.
- **Monthly Call Activity**: Shows call opening and closing trends over the **last 12 months**.

The following are **not** included:

- Calls belonging to other customers - each customer sees only their own data
- Internal technician notes that have not been marked as public
- Events older than 7 days in the Recent Events widget

- Call activity older than 12 months in the Monthly Call Activity chart

Access Level Note: *If your portal account is set to site-level access (meaning you are associated with a specific location), you will only see calls for your site. If your account has customer-level access, you will see calls across all of your organization's sites.*

Dashboard Filters

The time windows for each date-bound widget are selectable:

Widget	Default Time Window
Recent Events	Last 7 days
Monthly Call Activity	Last 12 months

Filters Sync

Each widget on this dashboard operates independently. There is no synchronization between them - clicking on one widget does not filter or change the others. Each widget pulls its own data for its own time window.

Widgets

This dashboard contains three widgets. The top half of the screen is split between the Active Calls table (left) and the Recent Events table (right). The bottom half displays the Monthly Call Activity trend chart spanning the full width.

Widget: Active Calls

Description: A table listing all service calls currently open for your account. Each row is one open call, showing its call number, date opened, problem description, current status, the person who reported it, the CSR handling it, and the assigned technician.

Columns Displayed:

Column	Description
Call No	The unique call number. Click to open the full call details.
Date	The date the call was created
Problem	A brief description of the reported issue
Status	The current status of the call (such as OPEN, DISPATCHED, or SCHEDULED)
Caller	The name of the person who reported the issue
CSR	The CSR managing the call
Tech	The technician assigned to work on the call

Data Source: This table shows all calls currently in an active (non-closed) status for your customer account. Calls are sorted with the most recent first and highest priority at the top.

Interpreting Widget: Each row represents one open issue. The Status column tells you where the call is in its lifecycle - for example, "Open" means it has been logged but not yet assigned, "Dispatched" means a technician has been sent, and "Scheduled" means a visit is planned. Check this table regularly to see the current state of all your outstanding service requests.

Widget Filtering: This widget automatically shows all open calls for your account. There are no additional filters to set.

Drilldown: Click any Call No to open the full details for that call, where you can see the complete history, notes, and status timeline.

Data Quality Note: If a call was just closed by your service team, it will no longer appear in this table. Check the Recent Events widget to see the closure activity, or the Monthly Call Activity chart to see it counted as a closed call for the month.

Widget: Recent Events

Description: A table showing recent activity on your service calls from the last 7 days. Each row is one event - a technician note, a status change, or an email related to one of your calls. Events are sorted with the most recent first.

Columns Displayed:

Column	Description
Call No	The service call the event relates to. Click to open the full call details.
Date	The date and time the event occurred
User ID	The person who created the event (such as a technician or CSR)
Comment	The text of the note, status update, or email body
Type	The kind of event (such as Note, Status, or Email)
Status	The current status of the related service call

Data Source: This table pulls two types of events from the last 7 days: (1) dispatch transaction notes and status updates that have been marked as public (visible to customers), and (2) emails related to your calls where your organization's email address appears in the message.

Interpreting Widget: Scan this table to see the latest activity across all your open calls. If a technician added a note or changed a call's status, it will appear here. If an email was sent or received related to one of your calls, it will also appear. This gives you a running feed of what is happening without needing to open each call individually.

Widget Filtering: This widget automatically shows events from the last 7 days for your account. Only public notes are shown - internal notes between service team members are not visible.

Drilldown: Click any Call No to open the full details for that call.

Important - Why Some Activity May Not Appear:

- If a technician added a note but it was not marked as public, it will not appear here. This is intentional - some notes are for internal coordination only.
- If you are looking for activity older than 7 days, it will not appear in this widget. Contact your service representative for historical information.
- If you expected an email to appear but it does not, the email may not have been linked to a call in the system, or it may not have included your registered email domain. Verify with your service representative.

Widget: Monthly Call Activity

Description: A line chart showing two trend lines over the last 12 months: one for calls **opened** (new issues reported) and one for calls **closed** (issues resolved). Each data point represents one month, and the data labels show the count for that month. The area under each line is filled with color to make the trends easier to compare visually.

Data Source: For each of your service calls in the last 12 months, the system records when it was opened and (if applicable) when it was closed. The chart counts how many calls were opened and how many were closed in each month, then plots both as separate lines.

Interpreting Widget: When the "Closed" line is above or equal to the "Opened" line, your service team is resolving issues at least as fast as they are coming in. When the "Opened" line is consistently above the "Closed" line, it means new calls are being created faster than they are being resolved - a growing backlog. Look for trends over several months rather than individual spikes, which may reflect seasonal patterns or one-time events.

Color Coding: The chart uses two colors to distinguish the lines - one for Opened and one for Closed. Check the legend on the chart to confirm which color represents which. The curved, filled lines make it easy to visually compare the two trends.

Widget Filtering: This widget automatically shows the last 12 months of data for your account. There are no additional filters to set.

Drilldown: This chart is for viewing only. Clicking on a data point does not filter or open any other information.

What If a Month Shows No Activity: If there were no calls opened or closed in a particular month, that month may not appear on the chart. The chart will skip to the next month with activity. This is normal for customers with low call volumes.

Widgets Relationship

The three widgets on this dashboard are **independent** - they do not filter or affect each other. Each one pulls its own data for its own time window.

However, they are designed to complement each other:

- **Active Calls** tells you what is open right now.
- **Recent Events** tells you what has happened in the last 7 days.
- **Monthly Call Activity** tells you how your call volume has trended over the past year.

A typical workflow: You check Active Calls to see your open issues. You notice a call has changed status, so you look at Recent Events to see the technician's note about it. Then you glance at Monthly Call Activity to see whether your overall call volume is increasing or decreasing.

Because the widgets are independent, you do not need to click anything to see the full picture - all three views load simultaneously when the dashboard opens.

Data Freshness

This dashboard loads data each time it opens or is refreshed. It does not update in real time.

- **Active Calls** reflects the current state of your open calls at the time of the most recent page load.
- **Recent Events** shows activity from the last 7 days as of the most recent refresh.
- **Monthly Call Activity** shows the trailing 12 months of data as of the most recent refresh.

If you are waiting for an update on a call, refresh the page to see the latest information.

Frequently Asked Questions

Q: Why don't I see any data on this dashboard?

A: Your Customer Portal account may not have been granted access to this dashboard. Contact your service provider's Q360 administrator to request access. If you have access but still see no data, it may mean you have no active calls and no recent events within the displayed time windows.

Q: A call was just closed but it still appears in Active Calls. Why?

A: Refresh the dashboard page. The dashboard loads data when the page opens and does not update in real time. After refreshing, the call should disappear from Active Calls if its status has been changed to a closed status.

Q: Why don't I see a technician's note that I know was added?

A: Only notes marked as public are visible on this dashboard. Internal notes (used for team coordination) are not shown to Customer Portal users. If you need to see a specific update, contact your service representative and ask them to ensure the note is marked as public.

Q: The Monthly Call Activity chart shows more calls opened than closed. Is that a problem?

A: Not necessarily for a single month - it may reflect seasonal patterns or a temporary increase in reported issues. However, if the "Opened" line is consistently above the "Closed" line over several months, it may indicate a growing backlog. Discuss with your service provider if you are concerned.

Q: I only see calls for one of my sites, but I have multiple locations. Why?

A: Your portal account may be set to site-level access, which limits your view to calls at your assigned site only. If you need visibility across all your sites, ask your service provider to upgrade your portal access to customer-level.

Q: Can I see events older than 7 days in the Recent Events widget?

A: No. The Recent Events widget is fixed to a 7-day window. For older activity, open individual calls directly using the Call No link in the Active Calls table, or contact your service representative for a detailed history.

Q: Can I see call activity from more than 12 months ago?

A: No. The Monthly Call Activity chart covers the trailing 12 months. For longer historical data, contact your service provider - they may be able to generate a custom report.

Q: Why does the chart skip a month?

A: If there were no calls opened or closed during a particular month, that month may not appear on the chart. This is normal and indicates no call activity was recorded for that period.

Related Dashboards

- **Service Call Open** (Internal) - The internal team's dashboard for monitoring active service calls. Customers see Active Calls on this portal dashboard; internal teams use Service Call Open for full operational management.
- **Service Call Closed** (Internal) - The internal team's dashboard for reviewing completed calls and response time performance. Customers see their own closure trends on the Monthly Call Activity chart here; internal teams use Service Call Closed for cross-customer analysis.

Human Resources Dashboards

The Human Resources section of Q360 provides visibility into your organization's workforce. The dashboard in this section gives HR teams and leadership a real-time view of who is on the team, where they are, and how the workforce is composed - without having to pull separate reports or export data to spreadsheets.

HR Overview Dashboard

Path: Dashboards > HR Overview

Roles: HR Managers, Department Heads, Executives, and anyone involved in workforce planning, staffing decisions, or organizational reporting.

Permission: Dashboards menu plus permission to this dashboard. Additionally, users must have HR Employee View access to see this dashboard.

Purpose

The HR Overview dashboard provides a visual snapshot of your organization's current workforce. It answers questions like:

- How many active employees do we have right now?
- How are employees distributed across branches and departments?
- What does our workforce look like in terms of age and gender?
- Who reports to whom?

This is a point-in-time view - it reflects the current state of employee records, not historical trends. If an employee transferred from Engineering to Sales last week, this dashboard shows them in Sales. For historical workforce movement, separate reporting would be needed.

Data Included

This dashboard shows **active employees only**. Whether an employee is considered "active" is determined by their employment status in Q360. Typical active statuses include Active, On Leave, and Probation, though the exact list depends on how your organization has configured its employee status codes.

The following are **not** included:

- Terminated or inactive employees (unless your organization has specifically configured a terminated status to be treated as active - which would be unusual)
- Contractors, consultants, or other non-employee records, even if they are stored in the same area of Q360
- Historical records - if an employee was terminated and later rehired into the same record, only their current information is shown

Dashboard Filters

Filter	Behavior	Default
Company	Narrows to a specific company (legal entity)	User's company
Branch	Narrows to a specific branch	User's branch
Department	Narrows to a specific department	User's department
Type	Narrows to specific employee labor type	All labor types
Status	Narrows to specific employee status	All statuses

Widgets

This dashboard contains seven widgets arranged across the screen. The top row provides high-level summary visuals, while the bottom half combines location-based charts with a detailed employee list.

Widget: Employee Count

Description: A single number displayed inside a gauge, showing the total headcount of active employees across the organization.

Data Source: This number is a simple count of all employee records that meet the "active" criteria described above. Every active employee is counted once, regardless of their role, labor type, or hours worked.

Widget Filtering: This widget reflects the entire active workforce with no additional filters. It updates automatically when you click on other charts (for example, clicking a specific department in the Department chart will update this count to show only that department's headcount).

Drilldown: No drilldown. Informational only.

Widget: Employees By Status

Description: A pie chart where each slice represents a different employment status (such as Active, On Leave, or Probation). The size of each slice shows how many employees are in that status relative to the total.

Data Source: Each employee in Q360 has an assigned status code. This chart groups all active employees by their status and counts how many fall into each group.

Interpreting Widget: If the majority of your workforce is in "Active" status, that slice will dominate the chart. Smaller slices for statuses like "On Leave" or "Probation" help you quickly see what proportion of your workforce is in a non-standard but still active state.

What Statuses Appear: Only statuses that your organization has configured as "active for reporting" will appear. This means you will not see Terminated or Inactive employees as slices in this chart. The exact statuses shown depend on your organization's Q360 general code configuration.

Widget Filtering: No additional filters. Shows all active employees organization-wide.

Drilldown: Click any slice to filter the Employee List (the table on the right side of the dashboard) to show only employees in that status.

Widget: Gender Mix

Description: A donut chart showing the gender distribution of the active workforce. Each segment represents a distinct gender value recorded in employee records.

Data Source: The chart reads the gender field from each active employee record and groups them by distinct values.

Interpreting Widget: Each colored segment represents one gender category and its proportion of the total workforce. Three colors are pre-assigned (red, green, yellow), supporting up to three distinct values.

Data Quality Note: If some employee records have no gender value entered, those employees will appear as a separate segment (which may display as blank or unlabeled). A noticeable blank segment suggests that employee records need updating.

Widget Filtering: No additional filters. Shows all active employees organization-wide.

Drilldown: Click any segment to filter the Employee List to show only employees of that gender.

Widget: Employees By Age Bracket

Description: A horizontal bar chart showing how many active employees fall into each age range. Age ranges are grouped into brackets: Under 20, 20–25, 25–30, 30–35, 35–40, 40–45, 45–50, 50–55, 55–60, and Over 60.

Data Source: Each employee's age is calculated from their date of birth as recorded in Q360. The system calculates age based on the number of full months between the birth date and today's date, then divides by 12. This means an employee's age on this dashboard increments when the calendar month passes their birth month, not necessarily on their exact birthday.

Interpreting Widget: Longer bars indicate age brackets with more employees. This chart is useful for succession planning (identifying how many employees are nearing retirement age), understanding generational composition, and planning for workforce development.

Bracket Boundaries: When an employee's age falls exactly on a bracket boundary (for example, exactly 30 years old), they are placed in the lower bracket (25–30 in this case, not 30–35). This is a consistent system behavior, not an error.

The "X" Category: If you see a bar labeled "X," it represents employees whose date of birth is missing or invalid in Q360. This is a data quality indicator - a noticeable "X" bar means HR should update those employee records with correct birth dates. This is especially important if your organization relies on age data for retirement eligibility or workforce planning.

Widget Filtering: No additional filters. Shows all active employees organization-wide.

Drilldown: Click any bar to filter the Employee List to show only employees in that age bracket.

Widget: Employees By Branch

Description: A vertical bar chart showing headcount at each branch (office location). Each bar represents one branch, and the bar height shows the number of employees assigned to it.

Data Source: Each employee record in Q360 includes a branch assignment. This chart groups employees by their current branch and counts the total per branch.

Interpreting Widget: Taller bars mean more employees at that location. This view helps leadership quickly compare staffing levels across offices and identify branches that may be understaffed or overstaffed relative to business needs.

Data Quality Note: If you see a bar with a blank or empty label, it represents employees who have no branch assigned in Q360. Depending on your organization, this may be intentional (for example, remote employees not tied to a specific office) or it may indicate missing data that needs to be corrected.

Widget Filtering: No additional filters. Shows all active employees organization-wide.

Drilldown: Click any bar to filter the Employee List to show only employees at that branch.

Widget: Employees By Department

Description: A vertical bar chart showing headcount in each department. Each bar represents one department, and the bar height shows the number of employees assigned to it.

Data Source: Each employee record in Q360 includes a department assignment. This chart groups employees by their current department and counts the total per department.

Interpreting Widget: Use this chart to compare department sizes and identify potential resourcing imbalances. For example, if your Sales department has significantly fewer people than your Service department, this chart makes that visible at a glance.

Important: Each employee appears in only one department - their currently assigned department. If an employee has responsibilities across multiple departments, only their primary department assignment is reflected here. Q360 does not support dual department assignments on a single employee record.

Data Quality Note: As with the branch chart, a blank or unlabeled bar indicates employees with no department assigned. If this bar is unexpectedly large, HR should review those records.

Widget Filtering: No additional filters. Shows all active employees organization-wide.

Drilldown: Click any bar to filter the Employee List to show only employees in that department.

Widget: Employee List

Description: A detailed table listing every active employee, showing their key information in columns. This is the most detailed widget on the dashboard and serves as the companion to all the charts above.

Columns Displayed:

Column	Description
Employee No.	The unique employee ID. Click to open the full employee record in Q360.
First Name	Employee's first name
Last Name	Employee's last name
Company	The company or entity the employee belongs to (relevant for multi-entity organizations)
Branch	The office or branch the employee is assigned to
Department	The department the employee is assigned to
Labor Type	The employee's job classification (such as Technician, Engineer, or Administrative)
Status	The employee's current employment status (such as Active or On Leave)
Reports To	The name of the employee's direct manager (displayed as Last Name, First Name)
Start Date	The employee's hire or start date
City	Employee's city
State	Employee's state or province
Country	Employee's country
Gender	Employee's gender
Age	Employee's calculated age in years
Age Group	The age bracket the employee falls into (matches the Age Bracket chart)
Birth Date	Employee's date of birth

Data Source: This table pulls from the same active employee records as all the other widgets. Every row is one active employee.

Widget Filtering: By default, the list shows all active employees. When you click on any chart element elsewhere on the dashboard (a pie slice, a bar, a gauge), this list automatically filters to show only the matching employees. For example, clicking the "Engineering" bar in the Department chart filters this list to show only Engineering employees.

Drilldown: Click any Employee No. to open that employee's full record in Q360. This allows you to review or update their details directly from the dashboard. You need HR Employee View permission to access the employee record.

Reports To Column: If a manager's name appears blank for an employee, it means either the manager relationship hasn't been set up in Q360, or the manager's record no longer exists. If you notice multiple employees with blank managers, bring this to your Q360 administrator's attention so reporting relationships can be corrected.

Widgets Relationship

All charts on this dashboard are connected to the Employee List table. This means the dashboard is interactive:

1. **Click any chart element** (a pie slice, a bar, a donut segment, or the gauge) to filter the Employee List to show only the matching employees.
2. **The filter is visual -** the list updates immediately on screen without reloading the page.
3. **To reset the filter**, refresh the dashboard or click away from the selected chart element.

For example, a typical workflow might be: you notice the "Over 60" bar in the Age Bracket chart looks larger than expected. You click that bar, and the Employee List instantly filters to show only employees over 60, allowing you to review their names, departments, branches, and start dates for succession planning purposes.

Data Freshness

This dashboard pulls data each time it loads or is refreshed. It does not update in real time as changes are made to employee records.

If you update an employee's department, status, or any other field in Q360, those changes will appear on this dashboard the next time you refresh or revisit it. There is no delay beyond the time it takes to reload the page.

Frequently Asked Questions

Q: Why don't I see any data on this dashboard?

A: You likely do not have HR Employee View permission. Contact your Q360 administrator to request access.

Q: I see an "X" bar in the Age Bracket chart. What does that mean?

A: "X" represents employees with a missing or invalid date of birth in Q360. Update those employee records with the correct birth date to eliminate the "X" category.

Q: Why is a manager's name blank in the "Reports To" column?

A: The reporting relationship either hasn't been set up for that employee, or the referenced manager record no longer exists in Q360. Ask your Q360 administrator to review and correct these relationships.

Q: An employee recently left the company but still appears on the dashboard. Why?

A: Their employment status in Q360 may not have been updated to an inactive status yet. Once HR updates their status to Terminated (or another status not configured as "active for reporting"), they will no longer appear on this dashboard after the next refresh.

Q: Can I filter this dashboard to show only one branch or department?

A: The dashboard itself does not have dropdown filters. However, you can click on a specific branch or department bar in the charts to filter the Employee List interactively. If you need a permanently filtered version, your Q360 administrator can configure a customized dashboard.

Q: Does the headcount include part-time employees?

A: Yes. The Employee Count is a headcount of all active employee records, regardless of full-time or part-time status. It does not calculate Full-Time Equivalents (FTE).

Q: Why does the dashboard show an employee in the wrong department?

A: The dashboard reflects whatever is currently recorded in the employee's Q360 record. If the department assignment is incorrect, update it in the employee record and refresh the dashboard.

Q: Can the dashboard be customized to show additional fields or different charts?

A: Yes. Q360 supports custom versions of the underlying data source. Your Q360 administrator or Solutions360 consultant can create a customized version that adds fields, changes chart types, or applies permanent filters. Contact your Q360 administrator to discuss customization options.

Related Dashboards

- **Executive Dashboard -** Includes a high-level employee headcount gauge as part of its organization-wide summary. Start there for a quick number, then come to HR Overview for the full workforce breakdown.
- **Employee Utilization -** Shows how employee time is being allocated across billable and non-billable work. Use HR Overview to understand who is on the team, then Employee Utilization to understand how they are spending their time.

Dashboard Relationships Map

Q360 dashboards are not isolated tools. They are interconnected views into a single, unified Q360 system. The same data that is entered at the operational level-when your team logs a time entry, creates an invoice, submits a purchase order, or opens a service ticket-flows upward through departmental dashboards and eventually into executive summaries. Understanding these connections helps you navigate the dashboards more effectively and use them as an integrated system rather than as standalone reports.

Every operational transaction in Q360 has a downstream reflection on one or more dashboards. Here are some key relationships:

From Projects to Executive Summary

When a project manager updates a project estimate or logs costs, that data appears immediately on the Project Overview dashboard. The same project data flows into the Executive Dashboard's project backlog summary and into the One Dashboard's forward-looking profitability projection. If you see an unexpected change in the Executive Dashboard's Backlog Gauge, you can drill deeper on the Project Overview dashboard to identify which projects changed.

From AR to Collections and Forecasting

Every invoice created in Q360 feeds the Accounts Receivable dashboard, which shows collection health, aging patterns, and outstanding balances in real time. The same AR data rolls up into the Executive Dashboard's AR Balance summary. The One Dashboard uses current AR trends to project future cash flow on its Cash Flow Forecast widget. If your CFO asks about collection health, start on the Accounts Receivable dashboard; if they ask whether collections will support next quarter's cash needs, that answer lives on the One Dashboard.

From Sales Pipeline to Revenue and Forecasts

Sales Opportunities captures every pipeline opportunity and its probability-weighted value. The Sales Dashboard shows individual rep performance against those opportunities. When opportunities are won and converted to booked orders, they move to the Sales Booking dashboard, representing actual committed revenue. That booked revenue then feeds into the One Dashboard's forward-looking profitability and the Revenue Dashboard's earned revenue trends. The Executive Dashboard synthesizes all of this into a single "Sales Pipeline" summary so leadership can see pipeline health at a glance without navigating multiple dashboards.

From Time Entry to Utilization and Project Costs

When a technician or consultant logs billable hours on a time entry, Q360 records both the operational fact (time spent) and the financial impact (cost incurred and revenue earned). The Employee Utilization dashboard aggregates all time entries to show how the workforce's hours are distributed across billable projects, billable service contracts, and non-billable activities. The same time data feeds into the Project Overview dashboard as project costs and impacts the One Dashboard's profitability projection. The Time Billing Summary dashboard shows hours and revenue from the time entry perspective. Together, these dashboards tell a complete story: who is working on what (Employee Utilization), how each person is splitting their time between admin and billable work (Time Bill By Employee Summary), how much those projects are costing (Project Overview), and what revenue are we earning (Time Billing Summary).

From Service Calls to Operational and Customer Views

Service calls begin their life when an open ticket is logged. The Service Call Open dashboard shows real-time workload, aging calls, and dispatch status. As tickets are resolved and closed, their details move to the Service Call Closed dashboard, where you can analyze resolution patterns, response times, and recurring issues. The Call Activity dashboard shows the customer-facing side of the same service operations-what your customers see and how they perceive the service they are receiving. If your service manager is concerned about customer satisfaction, the Call Activity dashboard provides that angle; if they are focused on operational efficiency, Service Call Open and Service Call Closed provide the operational metrics.

From Staffing Levels to Utilization and Capacity

The HR Overview dashboard counts your total workforce and breaks it down by branch, department, status, and age. The Employee Utilization dashboard takes that same workforce and shows how their time is being allocated. During resource planning, you can use HR Overview to verify headcount and confirm organizational structure, then use Employee Utilization to understand whether your current staffing is being efficiently deployed. For a per-person view of how time splits between admin and billable work within each department, continue to Time Bill By Employee Summary.

From Today's Cash to Tomorrow's Forecast

The Cash Position dashboard shows your current cash balance and recent cash activity. The Cash Forecast dashboard projects that cash balance forward by modeling collections, expenses, and capital needs. Together, they answer two questions: Where are we today? (Cash Position) and Where are we heading? (Cash Forecast). The One Dashboard integrates this cash view with profitability projections to give leadership a complete forward-looking financial picture.

From Bookings to Backlog to Fulfillment

Sales Booking shows orders that have been won and committed. Those booked orders create project or service contract backlog, which appears on the Project Overview as a backlog gauge and on the Executive Dashboard's Backlog summary. As the backlog is fulfilled (projects completed, service delivered), utilization rates on the Employee Utilization dashboard show the effort being consumed to deliver that backlog.

Troubleshooting FAQ

This section addresses common questions and issues that users encounter when working with Q360 dashboards. The answers cover multi-dashboard scenarios because most operational questions involve understanding how data flows across related dashboards.

Q: Why don't I see a particular dashboard in my menu?

A: Q360 dashboard access is controlled by user permissions. A user would need the general permission to see Dashboards menu plus to be explicitly assigned to the dashboard or be a member of a permission group that is assigned to the dashboard's permission.

Additionally, some dashboards require some additional permissions to be granted to the user:

- **HR Overview** requires HR Employee View access.
- **Sales Dashboard** requires SALESAUTO View access.

If you believe you should have access to a specific dashboard and it does not appear in your menu, contact your Q360 administrator to request the necessary permission.

Q: Why is a chart or widget showing no data?

A: When a dashboard widget appears blank or shows zero results, the most common causes are:

1. **Filters are set too narrowly.** Some dashboards have filter dropdowns (such as Branch, Company, or Department). If a filter is set to a specific location or department and there is no data matching that filter, the widget will be empty. Try widening your filter to "All" or a broader category.
2. **Data has not yet been entered or posted in Q360.** Q360 does not display data for transactions that have been created but not yet finalized or posted. For example, if an invoice has been created but not yet posted, it will not appear on the Accounts Receivable dashboard. Check with the relevant department to confirm that transactions have been entered and finalized.
3. **The time period filter is excluding your data.** Many dashboards default to a specific month or quarter. If your data falls outside that time window, the widget will appear empty. Check the date range or time period filter and adjust it to include the period you are interested in.
4. **The dashboard is defaulting to a specific company or branch with no matching records.** Some dashboards are configured to show data for a specific company or branch by default. If your records are in a different company or location, change the company/branch filter to match your data.

Q: Why did changing a filter not update all widgets?

A: Not all widgets on a dashboard respond to every filter, and this is by design.

On each dashboard, one widget acts as the "master widget" or filter driver-it is the widget that all other widgets listen to. When you change a filter using the master widget, other connected widgets update. For example, on the Employee List on the HR Overview, all the charts above it (Employee Count, Gender Mix, Age Bracket, etc.) respond to filter changes in the Employee List's columns.

- Some widgets operate on a fixed time window. For example, a 12-month trend chart always shows the past 12 months and does not respond to month-selection filters.
- Some widgets are designed to ignore certain filters. For example, a gauge showing "total organization headcount" may not respond to a department filter because its purpose is to show the organization-wide total.
- Some widgets are connected to their own data source and do not share the master filter.

If a filter change is not updating the widgets you expected: First, check which widget is the designated master filter driver for that dashboard (this is documented in the dashboard's reference section). Second, try refreshing the page to clear any stuck filter states. Third, verify that the filter you changed is actually connected to the widgets you expect to affect.

If you believe a widget should be responding to a filter and it is not, contact your Q360 administrator-this may be a configuration issue or a dashboard design that needs clarification.

Q: Why do my numbers look different from a separate report?

A: Q360 dashboards and reports can show different numbers even though they pull from the same underlying data. The most common reasons are:

1. **Different date ranges.** A dashboard may show data for the current month, while a report defaults to the calendar year. Always verify that you are comparing the same time periods.
2. **Different filter defaults.** Some dashboards default to "All companies" while reports may default to your primary company. Accounts Receivable dashboards may show all branches, while reports may default to your branch. Set both the dashboard and the report to the same filter values before comparing.
3. **Real-time vs. snapshot data.** Some dashboard widgets pull live data from Q360 each time the page loads, while others use periodic snapshots. For example, a Current AR Balance gauge shows live data, but an AR Aging Trend chart uses month-end snapshots. A report may pull month-end data while the dashboard is showing today's live data, causing discrepancies. When making financial decisions, confirm which view (live or month-end snapshot) you should be using for that decision.
4. **Different aggregation levels.** A dashboard may aggregate data at the header level (invoice totals), while a report may aggregate at the line-item level. Or a dashboard may show department totals while a report shows cost code totals. Check the dashboard documentation to understand its aggregation method.
5. **Revenue recognition timing.** "Revenue earned," "revenue invoiced," and "revenue collected" are three different numbers. A dashboard may show revenue earned (based on project completion), while a report may

show revenue invoiced (when an invoice was issued) or revenue collected (when payment was received). During financial close, confirm which revenue recognition method applies to your organization's policies.

Before concluding that numbers are wrong, always check date ranges, filter settings, and the underlying data aggregation method. When in doubt, contact your finance team or Q360 administrator to clarify how each view calculates its numbers.

Q: Why does a chart show a blank or unlabeled bar or slice?

A: Blank or unlabeled bars and slices are typically data quality indicators, not errors in the dashboard. They appear when the underlying records are missing a value in a field that the chart uses for labeling or grouping.

Here are common examples:

- **Age Bracket chart shows an "X" bar:** This represents employees with a missing or invalid date of birth. Update those employee records with the correct birth date in Q360.
- **Employees By Branch chart shows a blank bar:** These are employees with no branch assigned. Either this is intentional (remote workers not tied to a branch) or it represents missing data that HR should correct.
- **Employees By Department chart shows a blank bar:** Same as above-employees with no department assigned.
- **Opportunity Funnel chart shows a bar labeled "Phase 1" unexpectedly large:** Opportunities without a funnel stage assignment default to Phase 1. Sales should assign the correct stage to opportunities.
- **Invoice aging chart shows "Other" category:** Invoices without proper branch or department coding appear in "Other." Check with your finance team to ensure proper coding on new invoices.

These blank or "X" or "Other" entries are not errors-they are signals that source data needs attention. Update the underlying records in Q360, and the dashboard will automatically reflect the corrected data on the next refresh.

Q: How do I export data from a dashboard?

A: Dashboard grids (tables) have a context menu export option. For other widgets or the dashboard as a whole, there is currently no way besides screenshotting the dashboard.

Q: Can dashboards be customized for my team?

A: Yes, Q360 dashboards can be customized.

Common customization options include:

- **Adjust filter defaults.** A dashboard can be configured to default to your team's branch, department, or company instead of showing all company data. This narrows the default view to what your team cares about most.
- **Change which widgets appear.** Administrators can remove widgets that are not relevant to your team and keep only those that matter for your role.

- **Modify gauge thresholds.** Color thresholds on gauges (red/yellow/green ranges) can be adjusted to match your organization's performance targets instead of system defaults.
- **Add or remove columns from grids.** Table columns can be customized to show the fields most relevant to your team.
- **Create role-specific or department-specific versions.** Your Q360 administrator can build a Sales version of the Executive Dashboard (sales-focused) and a Finance version (finance-focused) from the same underlying data.
- **Add or remove widgets.**

To request a customized dashboard, contact your Q360 administrator or Solutions360 customer support. Be specific about what changes you need and why-for example, "We need the Employee Utilization dashboard to default to the Engineering branch and add a column showing billing rate." The more specific your request, the easier it is to implement.

Q: How often does dashboard data refresh?

A: Dashboard data refresh behavior depends on the type of widget and how it is configured.

Live data (refreshes on page load): Most dashboard data is live. Every time you load or refresh the dashboard page, widgets pull the current data from Q360's records. Examples include:

- Current balance gauges (Cash Position, AR Balance, Project Backlog)
- Employee lists and employee count
- Current open tickets on Service Call Open
- Real-time headcount and utilization rates

Periodic snapshots (updated on a schedule): Some data uses periodic snapshots, typically taken at month-end or via a nightly aggregation:

- **AR Aging Trend chart** uses month-end snapshots, so it updates once per month.
- **Employee Utilization dashboard** uses nightly aggregated time entry data, so utilization percentages may lag by one day if time entries are submitted late.
- **Backlog Burn Rate chart** uses month-end snapshots to calculate month-over-month burn rates.
- **Cash In / Out chart** uses periodic snapshots, typically updated daily.

Why this matters: If you refresh the dashboard and a widget appears stale, the issue is likely that the snapshot data process has not yet run. For example, if you check Employee Utilization at 6 AM and yesterday's time entries have not been processed yet, the nightly aggregation may not be complete.

To ensure you are seeing current data:

1. Refresh the dashboard page. This forces live widgets to pull fresh data.
2. For snapshot-based widgets, verify that the nightly or periodic data process has run. Check with your Q360 administrator about the timing of BI data aggregation jobs.

3. If data seems stale, ask your Q360 administrator to confirm that automated data processes are running on schedule.

Q: What should I do if I think a number is wrong?

A: Q360 dashboards display exactly what has been entered into the system. If a number looks incorrect, the most common causes are (in order of likelihood):

1. **Unposted transactions.** Invoices, time bills, purchase orders, and journal entries often exist in "draft" or "pending" status before they are officially posted. Unposted transactions do not appear on most dashboards. Check with the relevant department to confirm that transactions have been finalized and posted.
2. **Missing or incomplete data.** Records without proper coding in key fields (branch, department, project assignment, cost codes, etc.) may not roll up to the dashboard in the expected way. They may appear in "Other" or "Unallocated" categories. Review the source records to ensure all required fields are filled in.
3. **Stale project estimates.** The One Dashboard and Project Overview use project manager estimates of costs and timeline. If a project manager has not updated their cost forecast in several weeks, the projection will be inaccurate. Ask project managers to review and update their current estimates if projections look wrong.
4. **Gauge thresholds do not match your performance ranges.** A gauge may show red (below target) but your team may consider the number acceptable. This is often because the gauge's color thresholds were set to system defaults rather than your organization's actual performance expectations. Ask your Q360 administrator to review gauge thresholds and adjust them to match your organizational targets.
5. **Filters are narrowing the view without your awareness.** A dashboard may have a filter set to a specific branch or department, and you may not have noticed. Check all visible filter dropdowns and verify they are set to what you expect.

If a discrepancy persists after checking the above:

- Verify the number on the underlying report (accessed from Q360's Reports menu). The report may provide more detail about what is included.
- Ask your finance or operations team to explain how the number is calculated. There may be an accounting principle or business rule you are not aware of.
- Contact your Q360 administrator with a specific description of the discrepancy ("Accounts Receivable shows $500K in aging, but my trial balance shows $600K") so they can investigate the root cause.

Most dashboard discrepancies resolve once unposted transactions are posted, missing data is filled in, or filter settings are clarified. Start with those before assuming the dashboard itself contains an error.