

Decizion Reporting

Decizion is a reporting and automation platform purpose-built for field service businesses.

It turns your ServiceTrade, CRM, ERP, and other data into actionable insights automatically so you can:

- Understand profitability and efficiency
- Spot operational bottlenecks
- Identify trends



YOUR PARTNER THOUGH IT ALL

info@decizion.io



Benefits:

1. **Real-Time Reporting**
2. Filter by tech, customer, time, region
3. Merge with CRM, ERP, spreadsheets, ServiceTrade, InspectPoint, and others

Designed for Scale:

- Serves companies from \$3M to \$1B+
- Handles millions of records and any complexity
- No IT team required

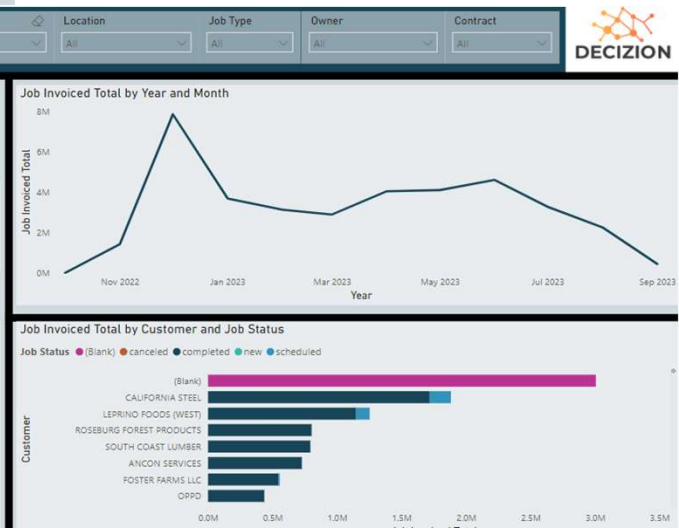
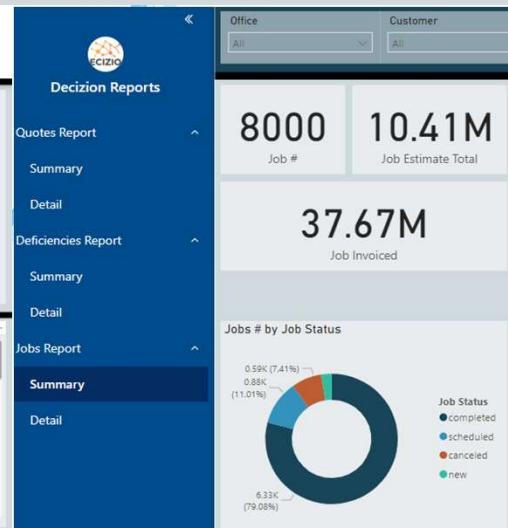
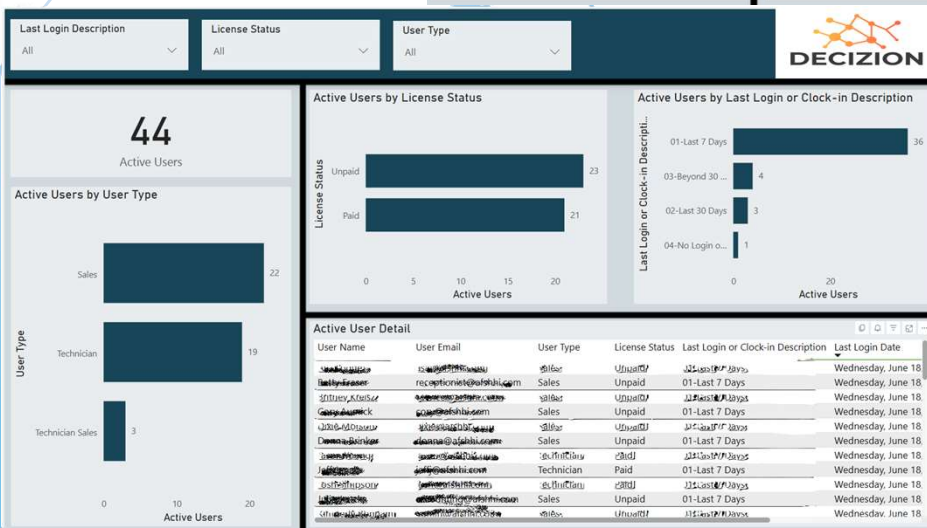
Packages That Grow With You

- **Foundation Package:** Quote Summary, Deficiency, Job Summary, User Adoption
- **Advanced Package:** All Foundation reports + many other reports including Profitability, Detailed Views, Efficiency
- **Optional Extensions (Advanced only):**
 - Commissions
 - Timesheets
 - Union Time
 - Profitability



Foundation Reports:

1. Quote summary
2. Deficiency summary
3. Jobs summary
4. User Adoption Report



Job Owner	Invoice Txn Date	Job Created Date	Job Type	Assigned Office
All	All	All	All	All

Job Service Line Profitability					
Job Service Line	Job Count	Invoice Count	Total Billing...	Total Cost	Margin Pct (Inv...
Anytime	115	94	\$175,117	\$110,774	36.7%
Commercial Con...	7	7	\$20,702	\$12,590	39.2%
Cooling	3	3	\$9,227	\$4,250	53.9%
Equipment Maint...	362	272	\$59,224	\$38,432	35.1%
Furnace	1	1	\$3,415	\$1,689	50.5%
General Resident...	1	1			
Glycol Unit Service	6	6	\$29,098	\$17,029	41.5%
HVAC	2,402	2,175	\$2,861,679	\$1,756,867	38.6%
Ice Machine	76	74	\$77,702	\$47,261	39.2%
Kitchen Exhaust ...	6	6	\$5,127	\$3,455	32.6%
Total	3,582	3,146	\$3,607,505	\$2,005,801	44.4%

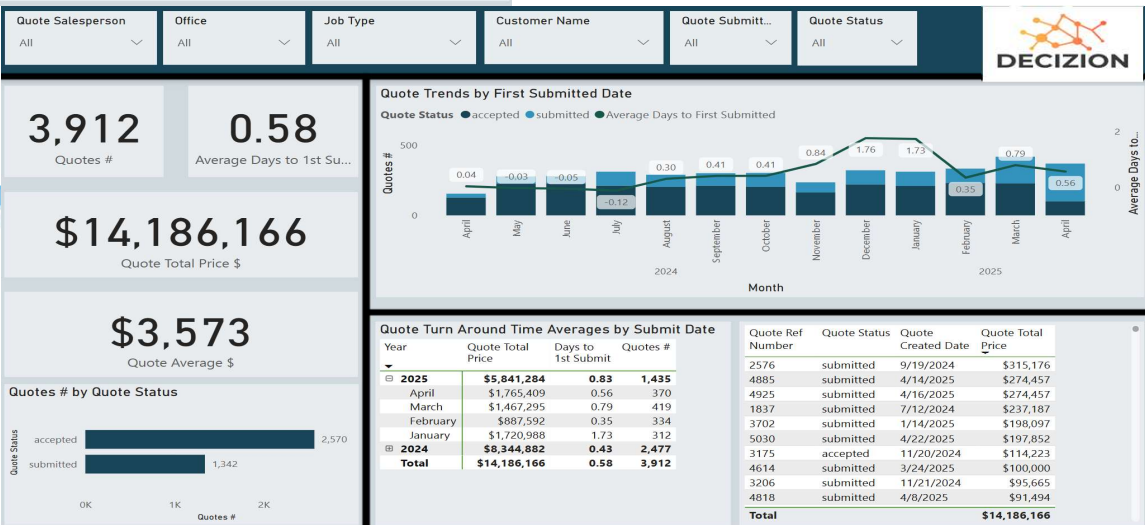
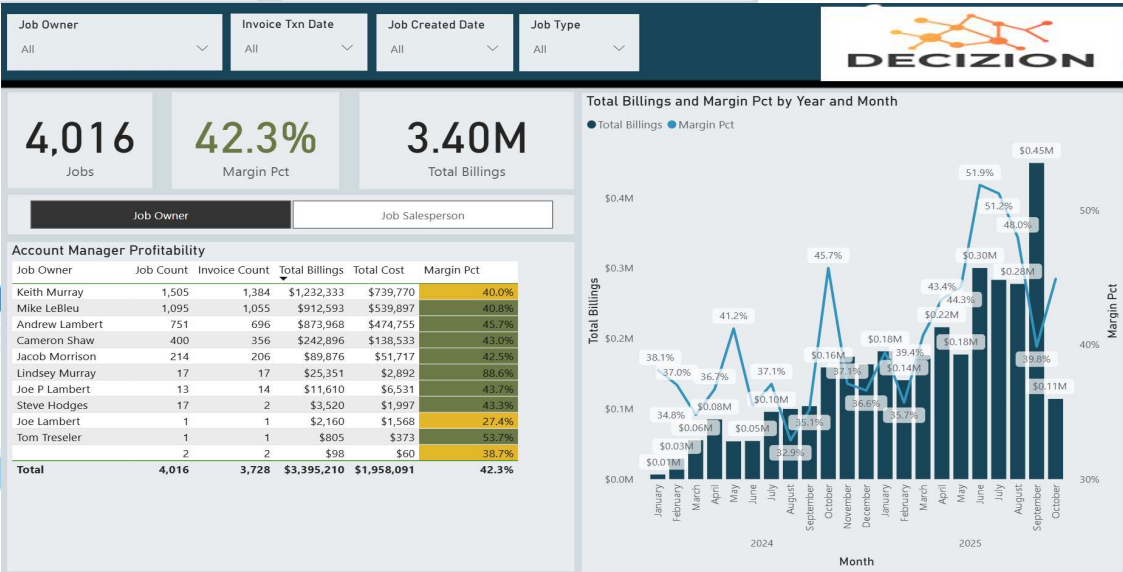
Job Type Profitability					
Job Type	Job Count	Invoice Count	Total Billin...	Total Cost	Margin Pct (Inv...
administrative	1	74	\$293,072		100.0%
emergency_servic...	197	182	\$183,263	\$96,520	47.3%
inspection	14	5	\$2,783	\$1,505	45.9%
installation	3	3	\$21,805	\$13,975	35.9%
pickup	3	3	\$1,837	\$1,410	23.2%
preventative_mainte...	1,318	1,058	\$397,532	\$226,432	43.0%
priority_service_call	184	168	\$205,373	\$106,122	48.3%
reinspection	1	1			
repair	267	237	\$706,304	\$438,512	37.9%
Total	3,582	3,146	\$3,607,505	\$2,005,801	44.4%

Customer Profitability					
Customer Name	Job Count	Invoice Count	Total Billing...	Total Cost	Margin Pct (Inv...
10 Federal	509	1			
4Ward Land Surveying	4	4	\$6,823	\$4,034	40.9%
AAFES	7	9	\$5,963	\$2,242	62.4%
Action Behavior Centers	1	1	\$889	\$395	55.6%
Application Support C...	1,016	1,018	\$1,248,123	\$572,870	54.1%
Aspen Oak Industrial	1	1	\$900	\$724	19.0%
Associated Restaurant ...	1	1			
Atlas Coffee Club	5	5	\$10,854	\$5,622	48.2%
Banner Industries	1	1	\$533	\$313	41.3%
Total	3,582	3,146	\$3,607,505	\$2,005,801	44.4%

Job Profitability					
Job Ref Number	Job Count	Invoice Count	Total Billings (...)	Total Cost	Margin Pct (Inv...
33587753	1	74	\$293,072		100.0%
33652428	1	1	\$1,692	\$728	57.0%
33652430	1	1			
33652433	1	1			
33680386	1	1	\$930	\$240	74.2%
33776708	1	1	\$805	\$261	67.5%
33830818	1	1	\$1,159	\$565	51.3%
33858770	1	1	\$1,335	\$586	56.1%
33858902	1	1			
Total	3,582	3,146	\$3,607,505	\$2,005,801	44.4%

Advanced Reports:

- 1. Job Projections
- 2. Job Profitability
- 3. Job by Account Manager
- 4. Jobs Detail
- 5. Invoice Detail
- 6. Quote Detail
- 7. Quote close efficiency
- 8. Quote submitted efficiency
- 9. ST invoice aging



Job Owner

All

Invoice Txn Date

All

Job Completed D...

All

Job Type

All

JO Commission = 35-40% @ 2% | >=40% @ 2.5%

FM Commission = 35-40% @ 1% | >=40% @ 1.5%

Job Commissions (Processed Invoices)

Job Owner

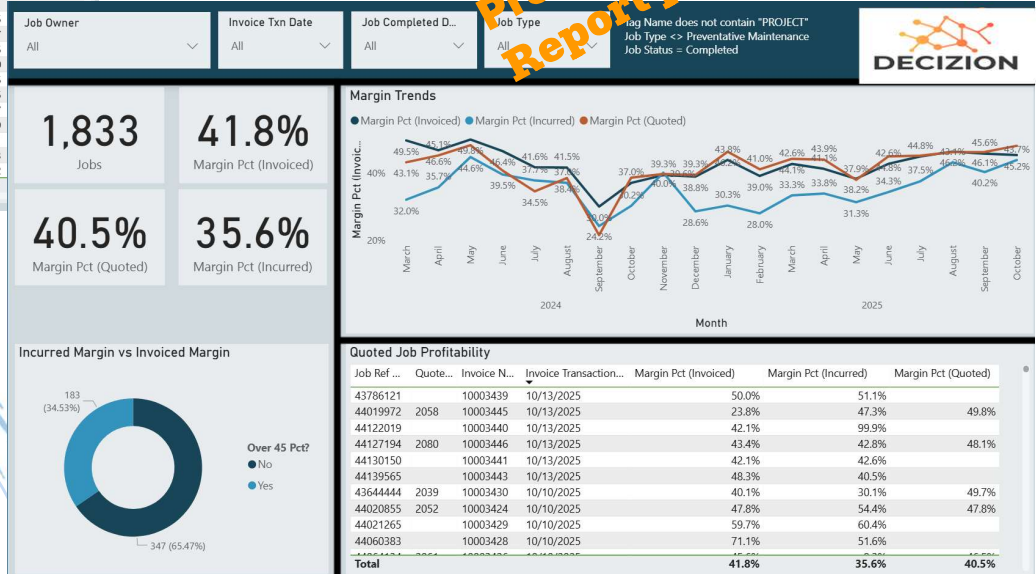
All

Invoice Number	Invoice Transaction Date	Job Ref Number	Completed Date	Job Status	Total Billings (Subtotal)	Total Cost	Margin (Invoiced)	Margin Pct (Invoiced)	JO Commission	FM Commission	Customer Name
10000629	9/26/2024			no job assigned	\$1,063		\$1,063	100.0%	\$28.75	\$17.25	
10000654	10/1/2024			no job assigned	\$1,063		\$1,063	100.0%	\$28.75	\$17.25	
10000683	10/8/2024			no job assigned	\$2,813		\$2,813	100.0%	\$76.11	\$45.67	
10000685	10/8/2024			no job assigned	\$1,155		\$1,155	100.0%	\$31.25	\$18.75	
10000686	10/8/2024			no job assigned	\$1,384		\$1,384	100.0%	\$37.46	\$22.47	
10000687	10/8/2024			no job assigned	\$1,165		\$1,165	100.0%	\$31.53	\$18.92	
10000688	10/8/2024			no job assigned	\$221		\$221	100.0%	\$5.99	\$3.59	
10000689	10/8/2024			no job assigned	\$1,220		\$1,220	100.0%	\$33.01	\$19.81	
10000793	11/1/2024			no job assigned	\$1,063		\$1,063	100.0%	\$28.75	\$17.25	
10000795	11/1/2024			no job assigned	\$275		\$275	100.0%	\$7.44	\$4.47	
10000916	11/26/2024			no job assigned	\$237		\$237	100.0%	\$6.42	\$3.85	
10000917	11/26/2024			no job assigned	\$1,688		\$1,688	100.0%	\$45.67	\$27.40	
10000942	12/3/2024			no job assigned	\$1,063		\$1,063	100.0%	\$28.75	\$17.25	
10001016	1/1/2025			no job assigned	\$1,063		\$1,063	100.0%	\$28.75	\$17.25	
10001017	1/1/2025			no job assigned	\$1,384		\$1,384	100.0%	\$37.46	\$22.47	
10001018	1/7/2025			no job assigned	\$221		\$221	100.0%	\$5.99	\$3.59	
10001019	1/7/2025			no job assigned	\$1,220		\$1,220	100.0%	\$33.01	\$19.81	
10001020	1/7/2025			no job assigned	\$531		\$531	100.0%	\$14.38	\$8.63	
10001021	1/7/2025			no job assigned	\$1,165		\$1,165	100.0%	\$31.53	\$18.92	
Total					\$3,594,478	\$2,000,570	\$1,593,908	44.3%	\$45,552.68	\$27,331.61	

Commissions Report package

1.8 Job

40.5 Margin Pct



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Customer Name: All Job Refs: All Clock-in Date: 6/2/2025 thru 6/30/2025 Job Tech: All Job Ref Number: All

Summary by Job

Job Ref Number	First Clock-in Date	Techs	Clock Events	Hours Clock
39768134	6/30/2025	1	3	11.65
41133384	6/30/2025	1	5	11.11
41133884	6/30/2025	1	3	10.27
41134366	6/30/2025	1	2	4.42
41371055	6/30/2025	1	2	6.51
41711870	6/30/2025	1	1	0.01
41839861	6/30/2025	1	2	2.74
41867944	6/30/2025	1	1	2.23
41876326	6/30/2025	1	2	2.09
41876935	6/30/2025	1	2	2.64
41880153	6/30/2025	1	3	6.55
40242297	6/27/2025	1	3	11.79
41132343	6/27/2025	1	3	10.54
41133689	6/27/2025	1	3	5.13
41737056	6/27/2025	1	2	2.69
41794541	6/27/2025	1	2	4.48
41813907	6/27/2025	1	2	2.62
41825760	6/27/2025	1	5	11.34
41827192	6/27/2025	1	1	2.99
41827993	6/27/2025	1	2	1.54
41835882	6/27/2025	1	7	9.47
41839777	6/27/2025	1	4	3.01
41842100	6/27/2025	1	3	61.48
41133953	6/26/2025	1	1	2.59
Total	6/2/2025	14	1,261	2,491.47

Job Clock Events

Job Ref Number	Clock-in Time	Clock-out Time	Job Tech	Clock Type	Clock Source	Hours Clock
41430825	6/10/2025 1:04:29 PM	6/10/2025 2:49:58 PM		enroute	mobile	1.76
41460982	6/10/2025 1:08:35 PM	6/10/2025 1:22:09 PM		enroute	mobile	0.23
41460982	6/10/2025 1:22:13 PM	6/10/2025 5:20:14 PM		onsite	mobile	3.97
41459805	6/10/2025 1:22:28 PM	6/10/2025 3:01:23 PM		onsite	mobile	1.65
41470863	6/10/2025 1:24:27 PM	6/10/2025 1:43:04 PM		onsite	mobile	0.31
41133559	6/10/2025 1:43:12 PM	6/10/2025 11:05:24 PM		onsite	mobile	9.37
41467353	6/10/2025 1:44:53 PM	6/10/2025 4:05:02 PM		onsite	mobile	2.34
41276731	6/10/2025 1:51:14 PM	6/10/2025 2:36:32 PM		enroute	mobile	0.76
41203058	6/10/2025 1:56:04 PM	6/10/2025 2:39:08 PM		enroute	mobile	0.72
41490478	6/10/2025 10:11:21 PM	6/10/2025 10:50:49 PM		enroute	mobile	0.66
41470863	6/10/2025 11:05:29 PM	6/10/2025 11:05:45 PM		onsite	mobile	0.00
41098642	6/10/2025 11:10:05 PM	6/10/2025 11:36:07 PM		enroute	mobile	0.43
41450905	6/10/2025 11:43:41 AM	6/10/2025 12:34:23 PM		enroute	mobile	0.85
41430825	6/10/2025 11:46:26 PM	6/11/2025 12:29:59 AM		enroute	mobile	0.73
41470863	6/10/2025 12:02:24 PM	6/10/2025 12:42:24 PM		enroute	mobile	1.37
41459805	6/10/2025 12:09:37 PM	6/10/2025 12:22:26 PM		enroute	mobile	1.21
41463119	6/10/2025 12:13:18 PM	6/10/2025 12:51:48 PM		enroute	mobile	0.64
41467353	6/10/2025 12:20:20 PM	6/10/2025 1:44:52 PM		enroute	mobile	1.41
41203058	6/10/2025 12:30:52 PM	6/10/2025 3:13:31 PM		enroute	mobile	2.71
41450905	6/10/2025 12:34:25 PM	6/10/2025 2:57:08 PM		onsite	mobile	2.38
41463119	6/10/2025 12:51:50 PM	6/10/2025 3:22:29 PM		onsite	mobile	2.51
41203058	6/10/2025 2:39:10 PM	6/10/2025 3:49:09 PM		onsite	mobile	1.17
40754142	6/10/2025 2:42:48 PM	6/10/2025 3:31:17 PM		enroute	mobile	0.81
41430825	6/10/2025 2:50:01 PM	6/10/2025 11:46:21 PM		onsite	mobile	8.94
41099078	6/10/2025 2:57:16 PM	6/10/2025 7:59:14 PM		onsite	mobile	5.03
Total						2,491.47

Invoice Txn Date: 2025 (Year) + M... Billing System Compare: All Invoice N...: All QB (e.g. ERP) loaded through: 3/31/2025

by Year

Year	Total ST Billings	Total ERP Billings	Variance ERP to ST Billings
2025	\$711,234.32	\$882,767.65	\$171,533.33
Total	\$711,234.32	\$882,767.65	\$171,533.33

System Comparisons

Billing System Compare	Total ST Billings	Total ERP Billings	Variance ERP to ST Billings
In ERP Only		\$132,299.20	\$132,299.20
In Both	\$711,234.32	\$750,468.45	\$39,234.13
Total	\$711,234.32	\$882,767.65	\$171,533.33

by Invoice

Invoice Number	Total ST Billings	Total ERP Billings	Variance ERP to ST Billings
12477383		\$44,142.30	\$44,142.30
12477275	\$32,304.36	\$32,304.36	
12477388	\$20,533.20	\$20,533.20	
12477372	\$17,839.22	\$17,839.22	
12477376	\$16,632.30	\$16,632.30	
12477370	\$8,731.00	\$8,731.00	
12476990	\$6,525.00	\$6,525.00	
12477375	\$6,172.20	\$6,172.20	
12477012	\$5,688.00	\$5,688.00	
12477460	\$4,435.00	\$4,435.00	
12477371	\$4,279.50	\$4,279.50	
12477009	\$3,444.00	\$3,444.00	
12477429	\$2,884.23	\$2,884.23	
12477004	\$2,631.50	\$2,631.50	
12477141	\$2,146.80	\$2,146.80	
Total	\$711,234.32	\$882,767.65	\$171,533.33

Invoice Details (multiple rows)

Invoice Number	Invoice Status	Invoice Tr...	Job Ref Number	QB Name
12477481	paid	3/31/2025	40069611	
12477488	paid	3/31/2025	40074056	
12477488	posted in QB	3/31/2025		GW Services, Inc;Tre #40074056
12477497	posted in QB	3/31/2025		O. C. Welch Ford;O. C #40076717
12477497	processed	3/31/2025	40076717	
12477531	paid	3/31/2025	40000719	
12477531	posted in QB	3/31/2025	40000719	Up in Smoke BBQ;Up
12477532	paid	3/31/2025	39337858	
12477532	posted in QB	3/31/2025	39337858	Association Services, Apartments;3933785
12477533	paid	3/31/2025	39587000	
12477533	posted in QB	3/31/2025	39587000	Association Services,
Total				



Commitments:

1. Foundation Report package = \$2500/year
2. Advanced Report package = \$5000/year (includes Foundation)
3. \$150/hr for consulting (pm, reporting, automation, architecture, design, etc)
4. Integration package = (ability for client to modify their own reports – priced per client)
5. Free Trial!

Extensions

(requires Advanced Package)

(yearly-\$2500 each or \$7,500 for all extensions)

1. Commissions reports
2. Timesheets
3. Union time
4. Profitability
5. Quickbooks paid invoice update corresponding ST invoice



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Next Steps!

1. Email info@decizion.io
2. Visit us on LinkedIn