PestPac by WORKWAVE®

END OF YEAR
Reporting Checklist

Celebrate the end of the year and the work you have accomplished over the past 12 months by reviewing the metrics most important to your business. PestPac's robust reporting options will give you the data you need to wrap up your year successfully.

Use this reporting checklist to make sure you get the most out of your software this year:

Accounts Receivable Reports

☐ This report is an opportunity to take a closer look at the types of outstanding balances and credit you have accumulated over the year. Use the filters to see payments due over a certain time frame/dollar amount.

Payment Register

☐ Running this for the year will show you how many payments were collected from customers. You can use the filters to get more granular for payments per type of service, if needed.

Invoice Register

☐ Run this report to see how much you billed your customers over the past year. Use these metrics to set goals for next year.

Tax by Tax Code Report

☐ If applicable, you can use this report to view a summary by tax code broken down by products and services. The report includes Total Sales, Taxable Sales, and Tax Collected.

Sales Tax by Components Report

☐ If applicable, you can run this report to see sales by municipal levels such as state, county, city, etc. The report will summarize by tax code, the subtotal, taxable amount, and each municipality.

Invoice List

☐ Use this report to see how much potential revenue you lost in the year due to cancelled services. This data can help direct your cancellation policies for the upcoming year.

Service Setup List

☐ Run this report to see customers that canceled. When running the report, make sure to enter the Starting and Ending Cancel Dates.

Service Order List

☐ Dive into open service orders and close/reschedule any outstanding services that may have been missed this year.