

Revenue Dashboard

User Guide

Track revenue metrics, outstanding invoices, and your estimate-to-payment pipeline from the Manager Portal.

Quick Reference

Access: Managers and admins only

Metrics: Monthly revenue, YTD, average job value

Pipeline: Draft → Sent → Approved → Invoiced → Paid

Location: Manager Portal > Revenue tab

Contents

1. Overview
2. Key Metrics
3. Estimate Pipeline
4. Using the Data
5. Quick Reference

1. Overview

The Revenue Dashboard gives managers real-time financial visibility without spreadsheets. It pulls data from completed jobs, invoices, and estimates to show where your revenue stands.

Access it from the Manager Portal's Revenue tab. Data updates in real time as jobs are completed and invoices are paid.

2. Key Metrics

The dashboard displays four headline metrics:

Revenue This Month	Total invoiced and paid amount for the current month
Outstanding Invoices	Unpaid invoices that are still open
Average Job Value	Mean value across all completed jobs
YTD Total	Year-to-date revenue from all paid invoices

3. Estimate Pipeline

The estimate funnel visualization tracks every estimate through its lifecycle:

- Draft — estimate created but not yet sent to client
- Sent — shared with client, awaiting response
- Approved — client accepted the estimate
- Invoiced — invoice generated from the estimate
- Paid — payment received

Tip: Look for bottlenecks — if many estimates are stuck at "Sent", follow up with those clients.

4. Using the Data

Use the revenue dashboard to make better business decisions:

- Identify which months are strongest and plan staffing accordingly
- Follow up on outstanding invoices before they become overdue
- Track your estimate conversion rate to improve proposals
- Compare average job value across time periods to spot trends

5. Quick Reference

Open dashboard	Manager Portal > Revenue
View pipeline	Revenue > Estimate Funnel
Check outstanding	Revenue > Outstanding Invoices
YTD total	Shown on main Revenue page