

## Tracking Report

### Overview

The purpose of the tracking report is to allow the customer to track all services being rendered to them, and the amount they are paying for these services. The rows of this report include service provider slots and blocks.

### Roles

Staff with the role of [Billing](#), and customers who are [Administrative Group Members](#), have the ability to run this report.

### Where

[Reports](#) → [Customers](#) → [Tracking Report](#)

### Filters

#### Group

Include only service requests for this group and all of its child groups.

#### Start Date

Include only assignments on or after this date.

#### End Date

Include only assignments on or before this date.

#### Collate By

This controls how the rows of this report are sorted. Rows can be sorted by [group](#), [service code](#), [service provider](#), or [date](#). For the [group](#), [service code](#), and [service provider](#) options, the rows are sorted by the selected option, and then by the date and time of the service.

#### Search Terms

uSked will display only rows where the search terms given is at least a partial match with either the service request ID, service provider name, or group name.

#### Built-In Filters

- Only service provider slots with a service provider assigned will be included.

- Service provider slots for service request with the status of **confirmed** will be included in this report, regardless of whether or not they are billable.
- Service provider slots for service requests with the status of **canceled** will be included in this report only if they are billable.

## Columns

### id

This will be the service request ID if the row is for a service request, or the block ID if the row is for a block. See [Service Request ID](#).

### service provider

This is the name of the service provider that has been assigned to this service provider slot or block.

### group

This is the customer that will be billed for the services performed.

### event name

This is the name of the event. This will be left blank for blocks.

### status

This is the current status of the service request. This will be left blank for blocks.

### client list

This is a list of the names of the clients to receive services. This will be left blank for blocks.

### location

This is the location at which the services are to be performed. This will be left blank for blocks.

### date

This is the date on which the client wants the services performed.

### start time

This is the time when this service provider is expected to begin providing the service.

### end time

This is the time when this service provider is expected to stop providing the service.

#### **docked time**

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This is the number of minutes to advance the start time of this service provider slot.

#### **additional time**

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This is the total number of additional minutes to be billed.

#### **total time**

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This is the total time to be billed, including any docked time and additional time. This is shown in human readable format such as 2h 30m.

#### **total minutes**

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This value is identical to the total time except it is displayed in minutes, which is not as human-readable but easier to deal with when brining this report into spreadsheet software.

#### **adjustment**

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Any surcharges or discounts to be applied, will be shown in this column.

#### **breakdown**

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This will be a human-readable breakdown of the amount to be billed, with details.

#### **grand total**

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The final amount to be billed to the customer.

#### **block %**

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For service provider slots that are connected to a block, this is the percentage of the block that this row takes up.

#### **block % minutes**

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This is the block percentage expressed in minutes.

#### **block % amount**

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This is the block percentage expressed in amount to be billed.

#### **verification form**

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This column contain a links to verification forms that have been uploaded, if any.