COMPARISON · FIELD SERVICE REPORTING

Custom dashboard vs. built-in reports: the three-question test

Write the three questions you want answered every month. Give each one ten minutes in your job software's built-in reports. If two come back yes, don't build.

SHOP 1 · MARISOL'S THREE QUESTIONS

Six-van electrical contractor, Fishers, IN · on Jobber (Grow plan)

THE QUESTION	BUILT-IN?	WHAT THE BUILT-IN REPORTS GAVE HER	WHAT A CUSTOM DASHBOARD ADDS
QUESTION 1 **Which job type had the best margin this year, drive time included?**	PARTLY	Profit and margin per job in the One-off jobs report. Rolling up by type took an export and a pivot table. Labor comes from time entries on the job, so drives and the inspection trip were missing.	Margin and profit per hour by job type, refreshed nightly, with drive time and return trips attached to the original job.
QUESTION 2 **What did each paid job cost in ads, by source?**	NO	Ad spend lives in Google. Calls live in the phone system. Jobs and invoices live in Jobber. No single report holds all three.	Spend from Google Ads and LSA, call log, and paid invoices joined into cost per paid job by source.
QUESTION 3 **How many generator plans lapsed this year, and who's due in Q1?**	NO	Plans run as recurring jobs. Jobber's help docs: "Reporting is not available for job costs on recurring jobs." No lapse view.	Every plan sorted into renewed, lapsed, and due in the next 90 days, with what each customer paid.

Score: half of one question out of three — BUILD

THE DASHBOARD THAT FILLS THE GAPS

Marisol's numbers, January through mid-November

Margin by job type

Dashed outline = what the Jobber export showed before drive time and inspection trips were added

Service calls · 610 jobs — **41%**

Panel upgrades · 96 jobs — **34%**

Generator installs · 38 jobs — **27%**

EV charger installs · 118 jobs — **14%** (export: 22%)

Second trip to meet the inspector + both drives, at $58/hr loaded labor

2027: raise the EV install price and quote the inspection trip as its own line.

Cost per paid job, by source

Ad spend + call log + paid invoices

SOURCE	SPEND	PAID JOBS	PER JOB
Local Services Ads	$31,900	171	**$187**
Google Ads	$19,800	64	**$309**
Repeat + referral	$0	627	**$0**

$79 diagnostic calls that never turned into a second invoice are counted as booked, not paid.

Generator maintenance plans

$289/yr plan · started 2026 with 140

140 Active Jan 1	86 Renewed so far
23 Lapsed in 2026	31 Due Jan-Mar 2027

Lapsed revenue, 2026	**$6,647**
Due in January	**12 plans**
Due Feb-Mar	**19 plans**

Shop 2 · Ray's three questions

Three-truck pest control company · on Jobber

What's coming in over the next 30 days? Projected income report	YES
Who's more than 30 days late? Aged receivables report	YES
How many hours did each tech log last month? Timesheets report	YES

Score: three out of three — DON'T BUILD

THE RULE

If the built-in reports answer two of your three questions, don't build a dashboard.

1. Write three questions with a number for an answer.
2. Give each one ten minutes in your job software. Built-in reports only.
3. Score yes, partly (export + spreadsheet), or no.
4. Before any build: start the job timer at departure, log return trips to the original job, and merge duplicate job types.

Illustrative shops and numbers. Report details per Jobber, Housecall Pro, and ServiceTitan help docs, checked November 24, 2026.