

WORK SAMPLE · DATA, REPORTING AND DASHBOARDS

A KPI dashboard over 24 months of Jobber jobs and Xero invoices

A Melbourne heating and cooling business with six technicians wants one place to see revenue, margin, quotes, technician load and cash, with every number traceable to Xero or Jobber. This sample builds the Looker Studio data source, the dashboard and the checks that stop a sync failure from hiding in the numbers.

24

months, Oct 2024 to Sep 2026

6,047

Xero invoices

6,330

Jobber jobs

19/19

controls pass

Revenue up +6.3% year on year, with every figure tied back to Xero

- 24 months of Jobber jobs (6,330), visits, quotes (2,778) and Xero invoices (6,047) and payments are joined into four data source tabs for Looker Studio.
- Revenue is read from Xero, so the 35 invoices raised only in Xero (contracts and extras, 55,940.00) are counted, and the 26 Jobber invoices that never reached Xero (40,434.50) show as a data check instead of hiding.
- 12 months to Sep 2026 against the 12 months before: revenue 3,248,606 (+6.3%), jobs done 3,185 (+9.0%), gross margin 48.5% (+0.0 pts), quote approval 46.7% (-0.7 pts).
- 35 completed jobs have no invoice after 14 days (37,699.50 at Jobber prices); 37 technician-months run over contract hours in peak season.

\$3.25M

revenue ex GST, 12 months to Sep 2026

48.5%

gross margin

35

jobs not invoiced after 14 days

19/19

controls pass

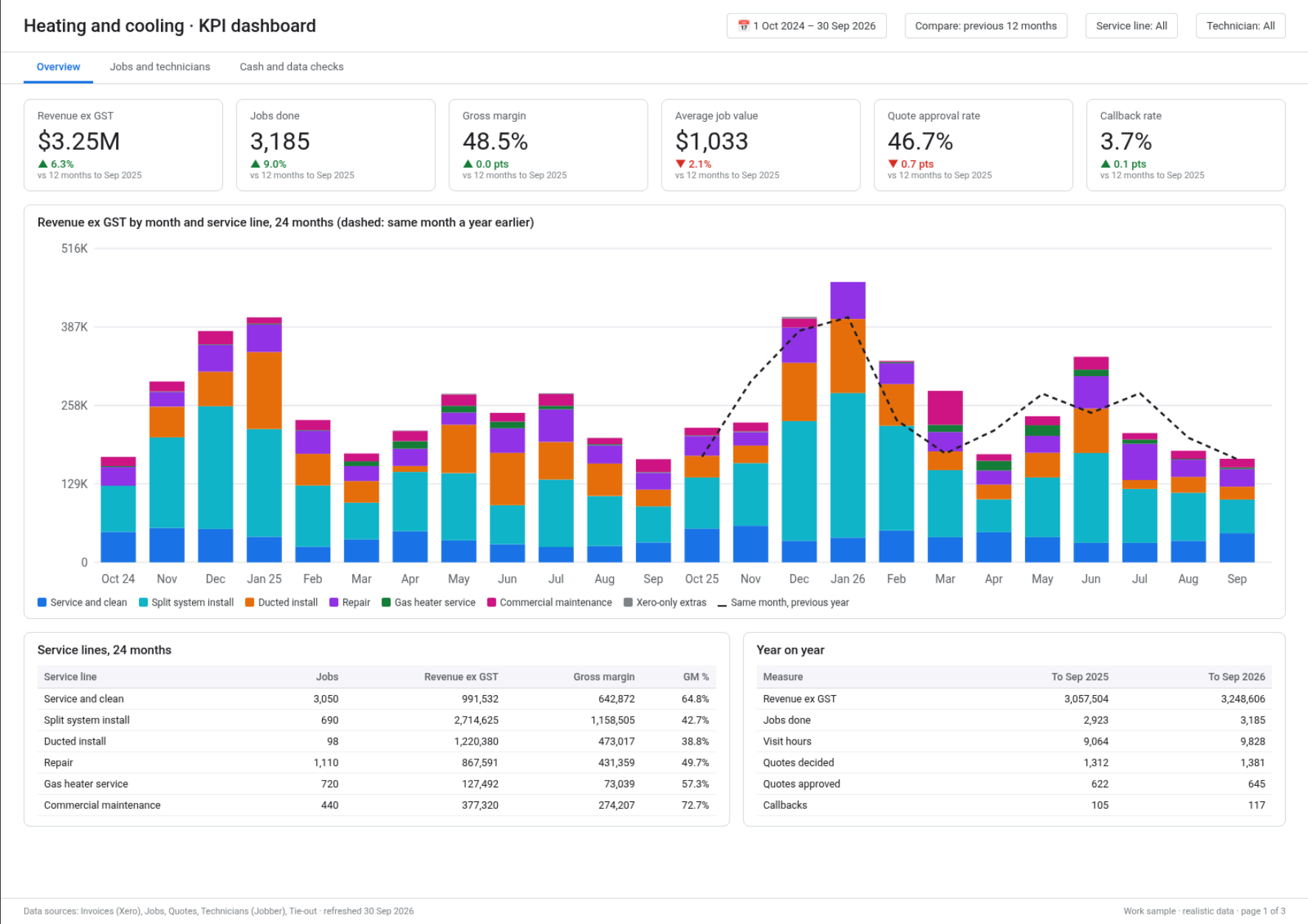
Six exports in, four data source tabs and a three-page dashboard out

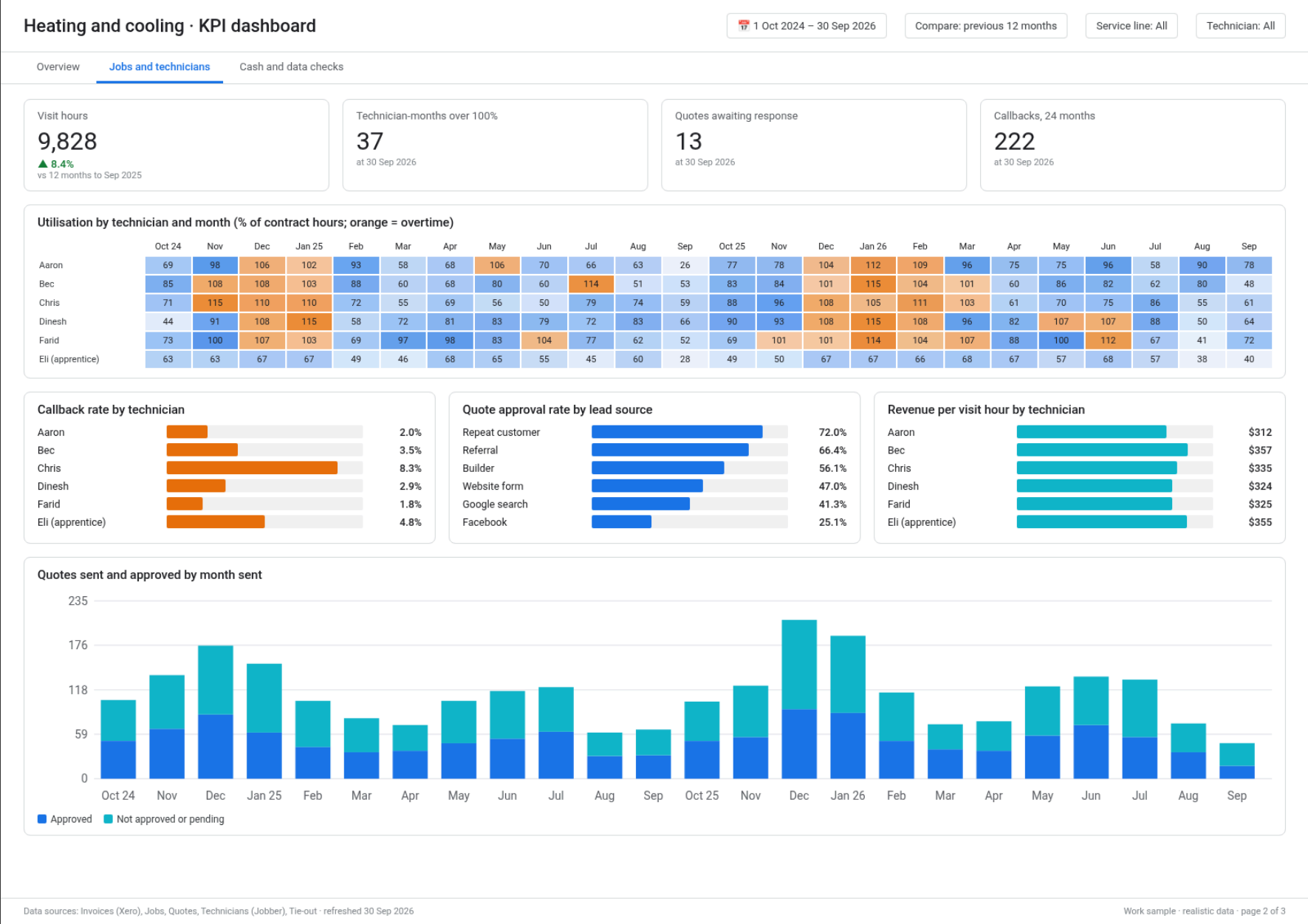
INPUT

	ROWS
Jobber clients	2,140
Jobber quotes	2,778
Jobber jobs (excl. upcoming)	6,330
Jobber visits (completed)	6,807
Xero invoices (voids excluded)	6,047
Technician-months	144

Deliverables

- Data source tabs: Invoices, Jobs, Quotes, Technicians (CSV or Google Sheets for Looker Studio).
- 24-month KPI series and a year-on-year view, all formulas.
- Three dashboard pages: Overview, Jobs and technicians, Cash and data checks.
- Twelve calculated field definitions, so the dashboard and the workbook agree.
- Jobber-Xero tie-out (6,084 rows) and the not-invoiced list.
- 19 controls, 10 engine tests, this report.

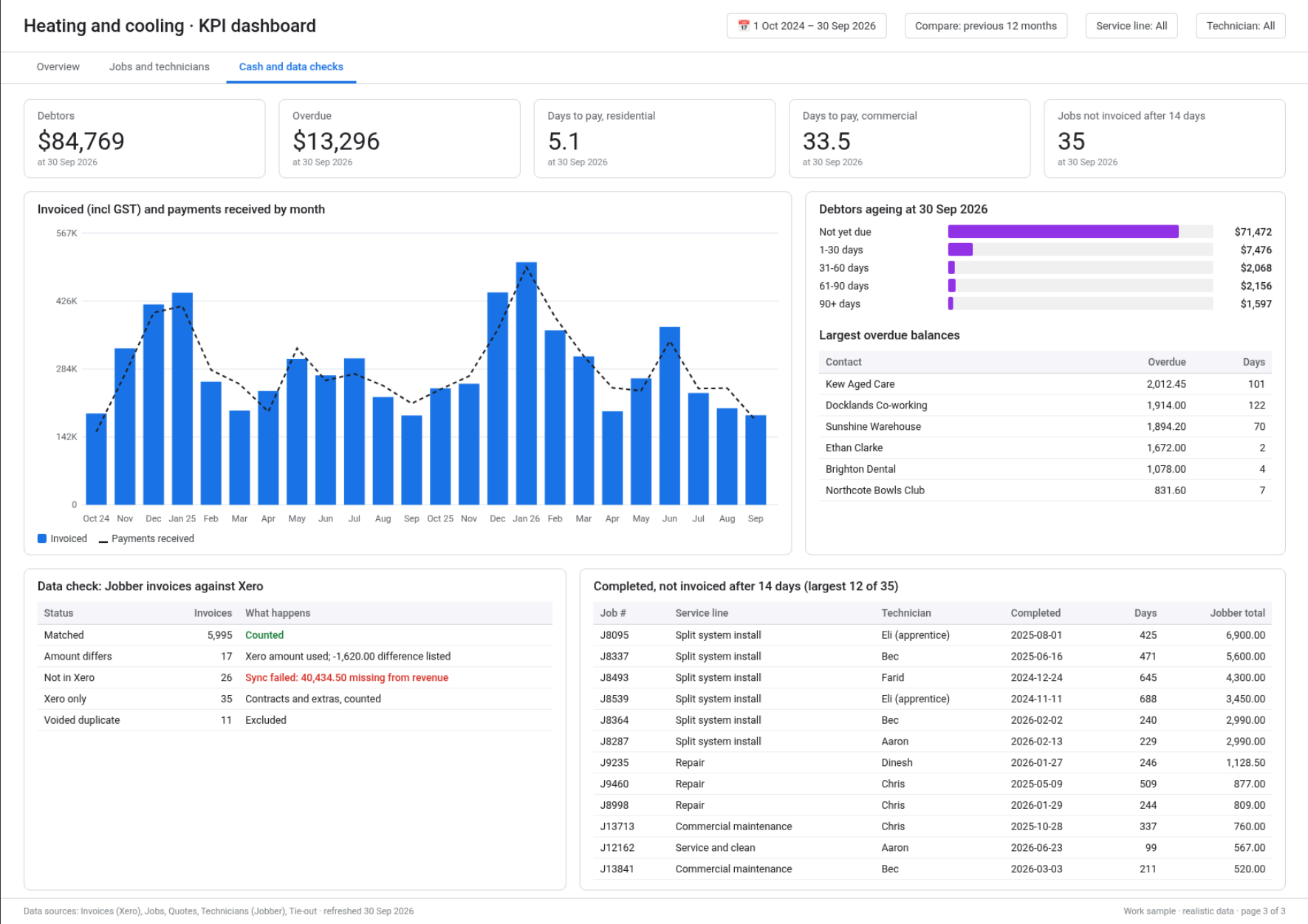




Quotes sent and approved by month sent

Data sources: Invoices (Xero), Jobs, Quotes, Technicians (Jobber), Tie-out · refreshed 30 Sep 2026

Work sample · realistic data · page 2 of 3



The same twelve months, compared

MEASURE	TO SEP 2025	TO SEP 2026	CHANGE
Revenue ex GST (Xero)	3,057,504	3,248,606	+6.3%
Jobs done	2,923	3,185	+9.0%
Callbacks	105	117	+11.4%
Callback rate	3.6%	3.7%	+0.1 pts
Job revenue ex GST	3,052,866	3,246,074	+6.3%
Gross margin	1,479,643	1,573,356	+6.3%
Gross margin %	48.5%	48.5%	+0.0 pts
Quotes sent	1,289	1,394	+8.1%
Quotes approved (of those sent)	599	645	+7.7%
Approval rate	46.5%	46.3%	-0.2 pts
Visit hours	9,064	9,828	+8.4%
Utilisation	76.2%	82.6%	+6.4 pts
Invoiced incl GST	3,363,255	3,573,466	+6.3%
Payments received	3,290,524	3,561,429	+8.2%

Comparing 12 months with the same 12 months a year earlier keeps the summer install peak and the winter gas-heater season out of the change.

- Revenue is from Xero; jobs, hours and quotes are from Jobber.
- Rates (margin, approval, callbacks, utilisation) are compared in points, not percent.
- The two windows add up to the 24-month total (control).

Jobber and Xero disagree on 43 invoices; the dashboard shows them

STATUS	INVOICES	EFFECT ON THE DASHBOARD
Matched	5,995	Counted
Amount differs	17	Xero amount used; -1,620.00 listed
Not in Xero	26	40,434.50 missing from revenue until synced
Xero only	35	Counted (contracts and extras)
Voided duplicate	11	Excluded

Also checked

- 35 jobs completed more than 14 days ago with no invoice: 37,699.50 at Jobber prices.
- Every invoice: $\text{ex GST} + \text{GST} = \text{total}$, and $\text{amount due} = \text{total} - \text{paid}$.
- Debtors ageing adds up to debtors (84,768.75).
- Gross margin = revenue - labour - materials on every job.
- No technician-month above the 120% overtime ceiling.

19 of 19 controls pass

CONTROL	ACTUAL	CONTROL	ACTUAL
Months in the series	24 PASS	Tie-out statuses cover every row	6,084 PASS
Monthly revenue adds up to every Xero invoice	6,306,110 PASS	Amount differs: total difference = engine	-1,620 PASS
Revenue = engine (Looker Studio data source)	6,306,110 PASS	Not invoiced after 14 days = engine	35 PASS
Two 12-month windows add up to 24 months	6,306,110 PASS	Done jobs with revenue but no invoice number	0 PASS
Jobs done = engine	6,108 PASS	Approval rate = engine	0.47 PASS
Callbacks = engine	222 PASS	Technician-months above the 120% overtime ceiling	0 PASS
Every Xero invoice: ex GST + GST = total (rows that differ)	0 PASS	Visit hours: technicians tab = jobs tab	18,892.20 PASS
Every Xero invoice: amount due = total - paid (rows that differ)	0 PASS	Gross margin = revenue - labour - materials on every job (rows that differ)	0 PASS
Debtors ageing buckets add up to debtors	84,768.75 PASS	Engine regression: tests that disagree with the answer key	0 PASS
Debtors = engine	84,768.75 PASS		

10 of 10 engine tests pass

TEST	EXPECTED	FOUND
revenue	6,306,110.00	6,306,110.00
ar	84,768.75	84,768.75
invoices	6,047	6,047
jobs done	6,108	6,108
callbacks	222	222
quotes sent	2,706	2,706
approved	1,267	1,267
decided	2,693	2,693
sync issues	89	89
sync false	0	0
not invoiced	35	35
not invoiced false	0	0
not invoiced value	37,699.50	37,699.50
callbacks linked	222	222

Handover

- The workbook (13 tabs, 499 formulas) and the four data source tabs.
- Field definitions for every calculated field in Looker Studio.
- A monthly refresh routine: export from Jobber and Xero, rerun engine.py, check the Controls tab, then refresh the data source.
- The dashboard PDF and this report.

This is a work sample with realistic data. Every figure comes from the sample files.