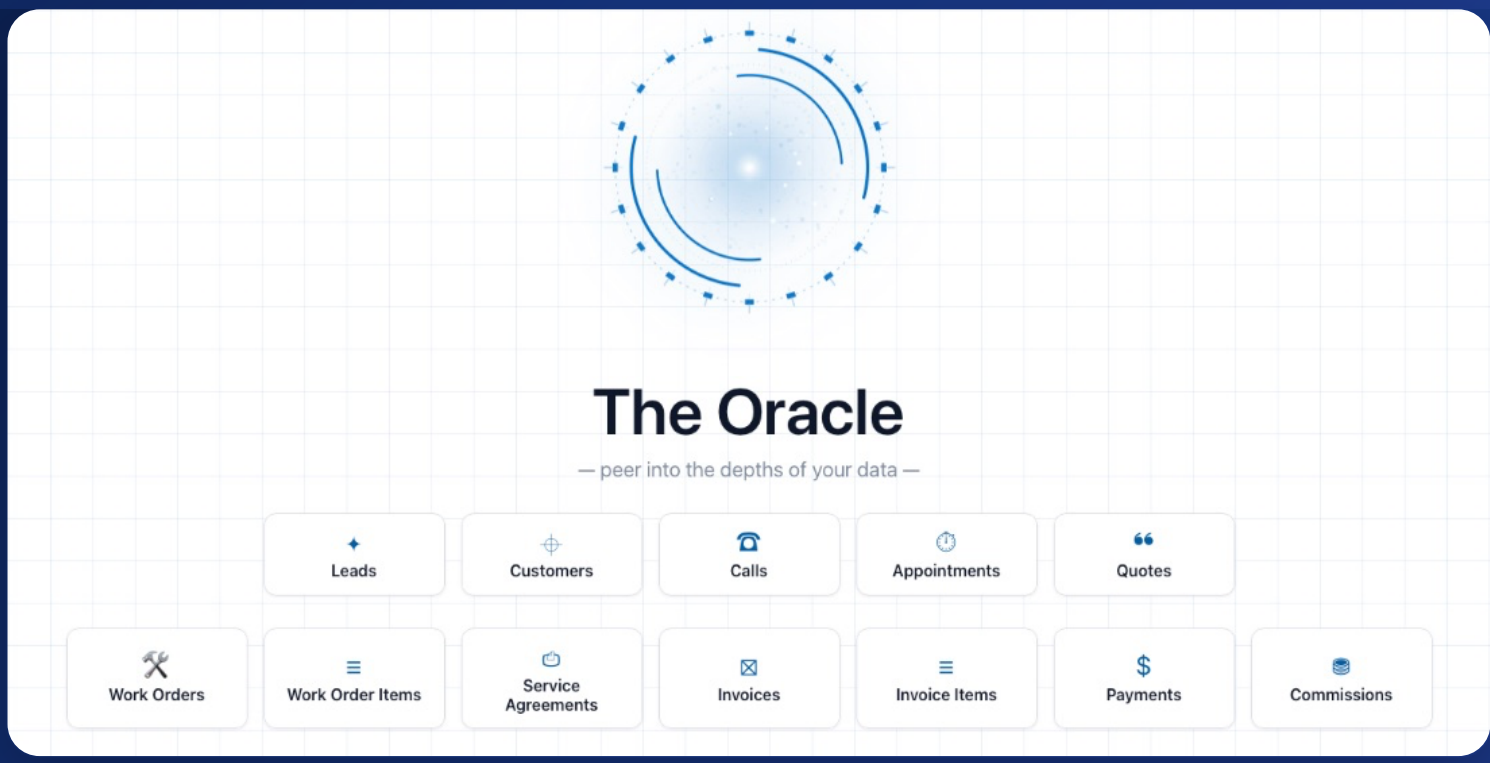


NEW IN SMART SERVICE

Meet The Oracle

— peer into the depths of your data —

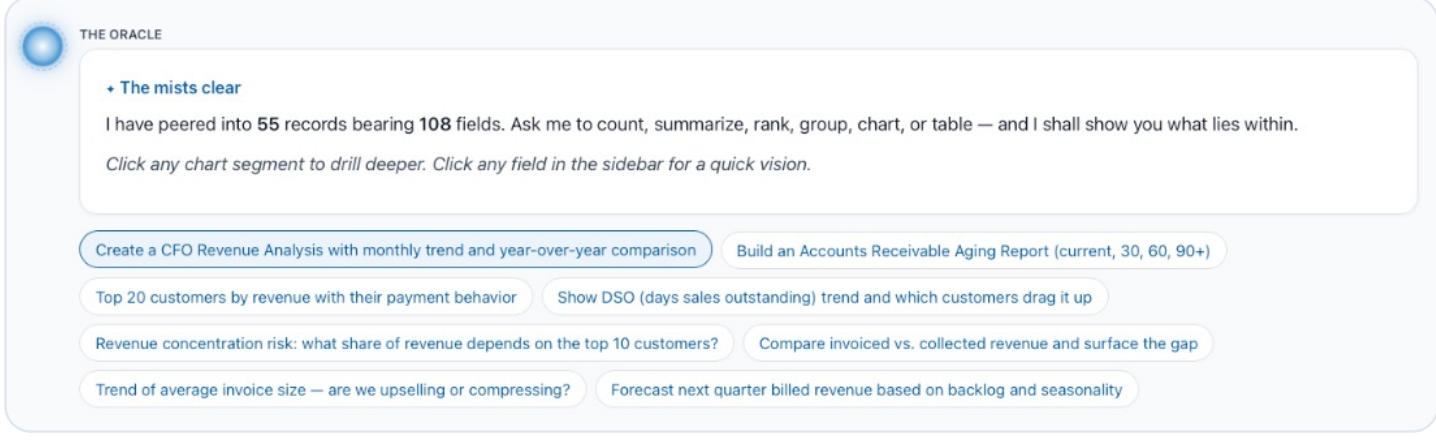


The Oracle is an AI data analyst built right into Smart Service. Ask a question in plain English — “Show me revenue by month,” “Build an AR aging report,” “Who are my top 10 customers?” — and watch it return interactive charts, sortable tables, pivots, and polished, print-ready documents in seconds.

STEP 1 · JUST ASK

Ask anything, in plain English

Pick a dataset and The Oracle greets you with smart, ready-to-run prompts tailored to it. No formulas, no report builder, no SQL — just type what you want to know.

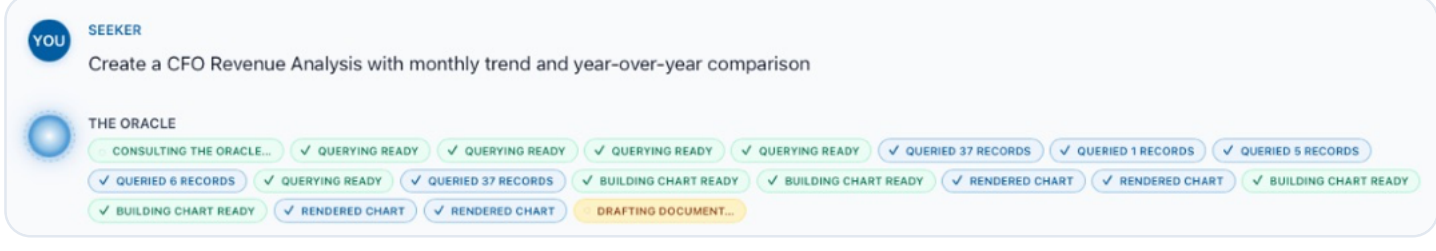


Every dataset opens with curated, one-tap prompts

STEP 2 · IT DOES THE WORK

Watch it think, step by step

Powered by Claude, The Oracle plans and runs the whole analysis for you — querying records, building charts, and drafting documents — with live status as each step completes.



Transparent, agentic tool use — right in the chat

STEP 3 · SEE IT CLEARLY

Beautiful, interactive charts

Bar, line, doughnut, or pie — switch types with a click, hover for exact values, and click any segment to drill deeper. Export as PNG or CSV, or copy straight into your spreadsheet.



Revenue vs. Cost vs. Profit — hover for precise figures



One click reshapes the same data into a trend line

STEP 4 · MAKE IT OFFICIAL

Boardroom-ready documents

Ask for a CFO Revenue Analysis, AR Aging Report, invoice, quote, or statement and The Oracle generates a fully formatted document — executive summary, trend tables, and rep breakdowns — ready to copy, download, or print to PDF.

CFO REVENUE ANALYSIS REPORT

REPORT

5 COPY

5 PRINT

5 PRINT PDF

CFO Revenue Analysis Report

Entity: Stringfield Industries, Inc. | Region: Midwest – Columbus | Company: Midstate Air Inc

Report Period: January 2026 – June 2026 | Generated: June 2026 | Total Invoices Analyzed: 55

1. Executive Summary

KPI	VALUE
Total Revenue (Invoiced)	\$31,326.08
Total Cost of Services	\$12,791.08
Gross Profit	\$17,367.10
Gross Margin %	55.4%
Total Payments Collected	\$9,054.29
Outstanding Balance (AR)	\$22,271.79
Collection Rate	28.9%

2. Monthly Revenue Trend (Jan – Jun 2026)

MONTH	INVOICES	REVENUE	COST	GROSS PROFIT	MARGIN %	PAYMENTS	BALANCE
January 2026	7	\$6,172.72	\$3,643.11	\$2,529.61	41.0%	\$0.00	\$6,172.72
February 2026	7	\$3,725.88	\$1,448.47	\$2,174.25	58.4%	\$1,782.87	\$1,943.01
March 2026	12	\$5,688.15	\$2,430.67	\$3,208.71	56.3%	\$4,431.69	\$-733.57
April 2026	9	\$5,823.72	\$1,481.88	\$4,068.05	69.9%	\$97.00	\$5,726.72
May 2026	14	\$3,004.75	\$1,364.03	\$1,637.04	54.5%	\$2,576.60	\$426.15
June 2026	10	\$6,900.86	\$2,422.92	\$4,076.40	59.1%	\$164.13	\$6,736.73
YTD Total	55	\$31,326.08	\$12,791.08	\$17,367.10	55.4%	\$9,054.29	\$22,271.79

5. Revenue & Profitability by Sales Representative

SALES REP	INVOICES	REVENUE	REVENUE SHARE	GROSS PROFIT	MARGIN %
Adrián Account	42	\$27,040.99	86.3%	\$15,309.05	56.6%
Carmen Mills-Gladney	6	\$3,208.99	10.2%	\$1,613.58	50.3%
Henry Lau	3	\$797.60	2.5%	\$630.45	79.0%
Jackson Cremer	1	\$142.50	0.5%	\$15.00	10.5%
Chris Alaimo	2	\$136.00	0.4%	-\$200.98	-147.8%
James Martin	1	\$0.00	0%	\$0.00	—
Total	55	\$31,326.08	100%	\$17,367.10	55.4%

A complete, formatted CFO report — generated from one prompt

STEP 5 · KNOW WHAT TO DO NEXT

Insights & actions, surfaced for you

The Oracle doesn't just report numbers — it flags risks like AR collection crises, unprofitable reps, and classification gaps, then recommends clear next steps and offers follow-up questions and a one-tap “Email it to me.”

7. Key CFO Observations & Recommendations	
1. Revenue Volatility:	Monthly revenue swings between \$3,004 (May) and \$6,900 (June) — a 130% spread. Consider pipeline reporting and backlog tracking to smooth forecasting.
2. Strong Margin Business:	Gross margin of 55.4% is healthy. Service Calls lead at 64.8% margin — prioritize growth in this category.
3. AR Collection Crisis:	Only 28.9% of invoiced revenue has been collected. \$22,271 remains outstanding with 42.4% aged 90+ days. A formal collections process needs to be enforced immediately.
4. Unclassified Invoices:	17 invoices (31.8% of revenue) lack an InvoiceType. This creates blind spots in segment reporting. Enforce classification at time of invoice creation.
5. Unprofitable Rep Activity:	Chris Alaimo's jobs are currently loss-making (-\$200.98). Review job costing and pricing authority.
6. June Strong Close:	June 2026 is trending as the highest-revenue month YTD at \$6,900.86 with a 59.1% margin — a positive momentum signal for Q3.
### 📌 Top CFO Action Items	
• AR Collections Emergency — \$8,155 (37%) is 120+ days past due; 42% of all AR is 90+ days old	
• Invoice Classification Gap — 17 invoices worth ~\$10K have no Invoice Type assigned, limiting segment visibility	
• Unprofitable Reps — Chris Alaimo's jobs are generating negative margin (-\$200.98); pricing review needed	
• Revenue Volatility — May was the weakest month (\$3K); June is the strongest (\$6.9K) — Q3 pipeline visibility is key	
The Service Call category is your most profitable segment at 64.8% margin — a clear signal for where to focus sales and capacity planning.	
[EMAIL IT TO ME] [SUGGEST QUESTIONS]	
Drill into 120+ days past due Review Chris Alaimo's pricing Assign missing invoice types Compare this year to last year	

Risks, recommendations, and next-step prompts — automatically

EVERYTHING IN THE BOX

A complete analyst's toolkit

12 connected datasets

Leads, Customers, Calls, Appointments, Quotes, Work Orders, Service Agreements, Invoices, Payments, Commissions & more.

Pivots & cross-tabs

Two-dimensional summaries with row and column totals and a built-in heat map — from one question.

Saved prompts

Save your go-to questions once; reuse them across every vision for that dataset.

Visions history

Every conversation is saved, searchable, and starrable — refresh any vision to pull fresh data.

Export anywhere

Download CSV, JSON, or PNG — or copy straight into Excel and Google Sheets.

Email it to me

Turn any answer, chart, or report into a formatted email with a single tap.

Your data stays put

The full dataset never leaves your browser — only the schema and a few sample rows are shared.

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