URTRAVELPRO

TRIPS

Reports overview

A tour of every report at /reports — Sales summary, Sales detail, Commission report, Aging + forecast, Booking funnel, Top suppliers + countries, Agent leaderboard, Per-client LTV, and the Passport access log. What each one answers, who it is for, and how the shared period picker works.

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On this page

The Reports landing page (at `/reports`) is where every cross-trip number lives — what you sold, what you earned in commission, who is winning the leaderboard, and who looked at a passport scan yesterday. Nine reports, grouped into five sections, all driven by one shared date-range picker.

> ADVISOR TIP
>
> **Start with Sales summary and Commission report.** Those two answer 80% of the questions an agency owner walks in with. The other seven exist for when you need a sharper lens.

The shared period picker

Every report carries the same date-range control at the top — preset buckets (This month, Last month, This quarter, Last quarter, This year, Last year, Year to date, Last 12 months) plus a custom from/to. Whatever you pick, the report compares the current window against the immediately-prior window of the same length: pick This quarter and you also see last quarter's totals as a delta percentage on each KPI.

> ADVISOR TIP
>
> **"This year" means calendar year.** We do not honor an agency fiscal year. If yours runs July-to-June, use Custom and pin the dates.

Sales — what you billed

Sales summary

KPIs at the top — Invoiced, Paid, Outstanding, Invoice count — each with a delta vs the prior period. Monthly trend chart with the prior period overlaid. Breakdowns by agent and by trip type. The 5-second answer to

"how is the agency doing this quarter?"

Sales detail

Per-invoice transactional table. Filter by agent, trip type, invoice status, supplier; sort any column; totals row at the bottom. Click a row to drill into the invoice. The follow-up answer to

"why did Sarah's number jump in May?"

The Sales summary page has a CSV export — **Download CSV** top right. The export honors your current filters and date range exactly. Sales detail is read on-screen; drill into individual invoices for the row-level math.

Commission — what you earn

Commission report

Every line item with received commission, joined to its supplier + agent + invoice. Monthly trend, top-10 supplier bar chart, supplier + agent filters, CSV export. Numbers are gross / agency net / host net, so the math is auditable. See the dedicated **Commission reports** article for a deeper walk-through.

Aging + forecast

Forward-looking. Four KPI buckets — Received YTD, Expected next 90 days, Expected (current year), Overdue — plus a 6-month forecast chart that splits Received vs Expected by month and a table of every overdue line ordered by days-late.

Pipeline & sources

- **Booking funnel + Time to booked** — Inquiries → Proposals sent → Proposals accepted → Trips traveled, with pairwise conversion rates. Below that, every trip in the period bucketed by how many days it took to convert from created to first accepted-proposal or first invoice.
- **Top suppliers + countries** — Two rankings on one page. Suppliers ordered by commission; countries ordered by trips. Doughnut chart of the top 8 + Other. Click any row to drill into the source line items or trips.

People

- **Agent leaderboard** — Per-agent Invoiced / Paid / Net commission / Invoice count, ranked by Invoiced. Trophy + silver + bronze for the top three. Renders one row for a solo-agent agency — still useful as a KPI strip.
- **Per-client lifetime value** — Top clients by Paid revenue. Top-10 bar chart + sortable table. Attribution is to the trip's primary traveler only so multi-traveler trips do not double-count.

Security

The **Passport access log** shows every upload, view, download, and delete of a passport scan across your agency, with the agent, IP address, and timestamp. Owners + admins only — passport-access history is itself sensitive. See the dedicated article for filtering and retention.

Per-agent filters and solo agencies

The reports that surface per-agent data (Commission report, Sales summary, Sales detail, Agent leaderboard) all let you scope to one agent via the **Agent** dropdown. The dropdown is tenant-scoped — it lists only people who have Trips access in your org. A solo-agent agency sees a single name in the dropdown and a single row on the leaderboard; the rest of the surface is identical.

ADVISOR TIP

Cancelled and draft invoices are excluded. Every sales-side total filters out `draft` and `canceled` invoices. If a number looks low, check whether the invoices you expected to see are still in draft.

Related

- Commission reports
- Agent leaderboard
- Passport access log
- The Commission Manager