

# TruMethods Smart Numbers

The TruMethods Smart Numbers app is a business management tool that provides a centralized, visual representation of your company's data and performance indicators. Business owners, service managers, and other stakeholders can refer to the TruMethods dashboards and widgets to gain real-time insights for informed decision-making, a thorough evaluation of performance, and timely action-taking.

The TruMethods Smart Numbers app is designed for TruMethods users and works on Professional Services Automation (PSA) software like ConnectWise, Autotask, and Kaseya BMS.

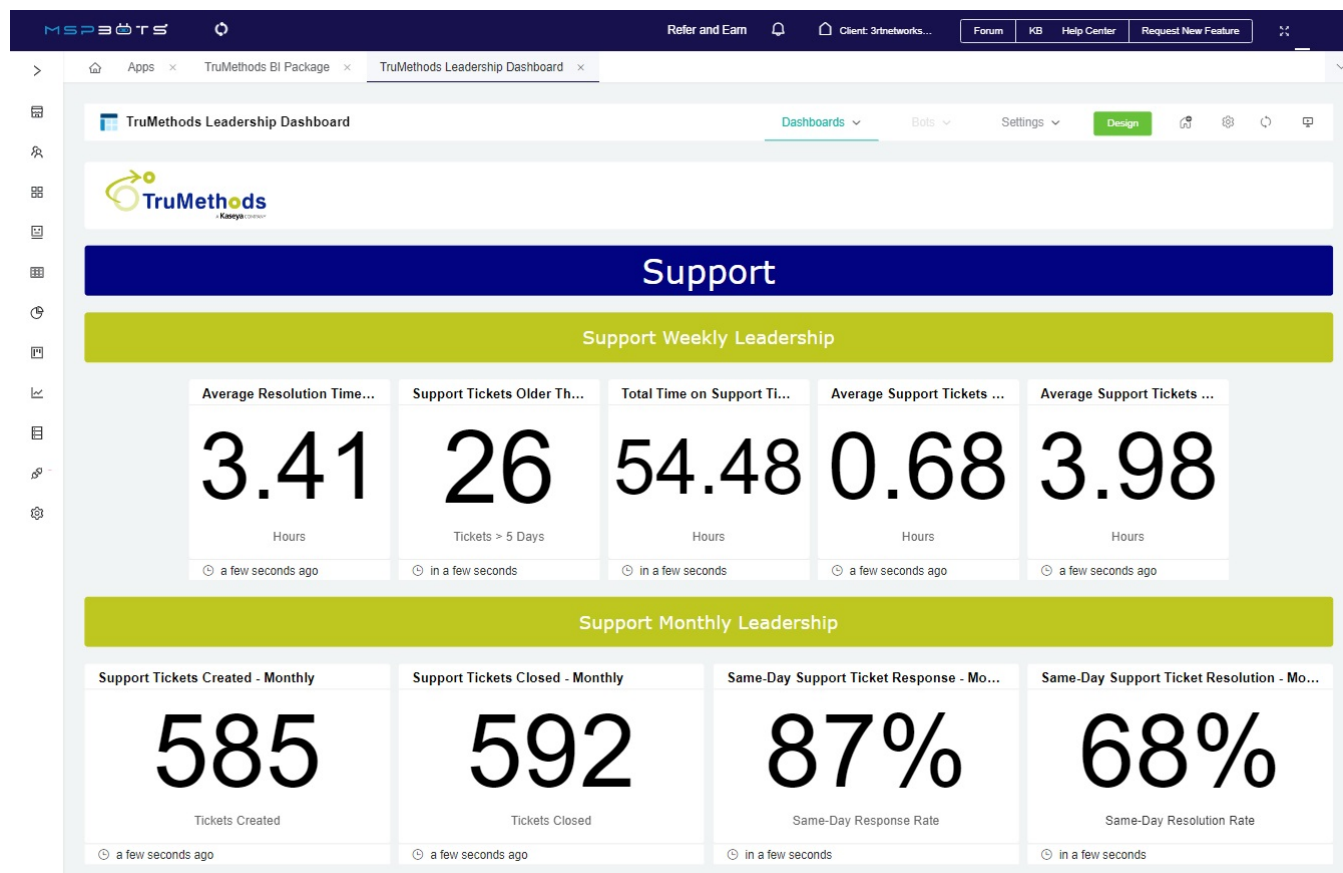
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What are the dashboards available in the TruMethods Smart Numbers app?

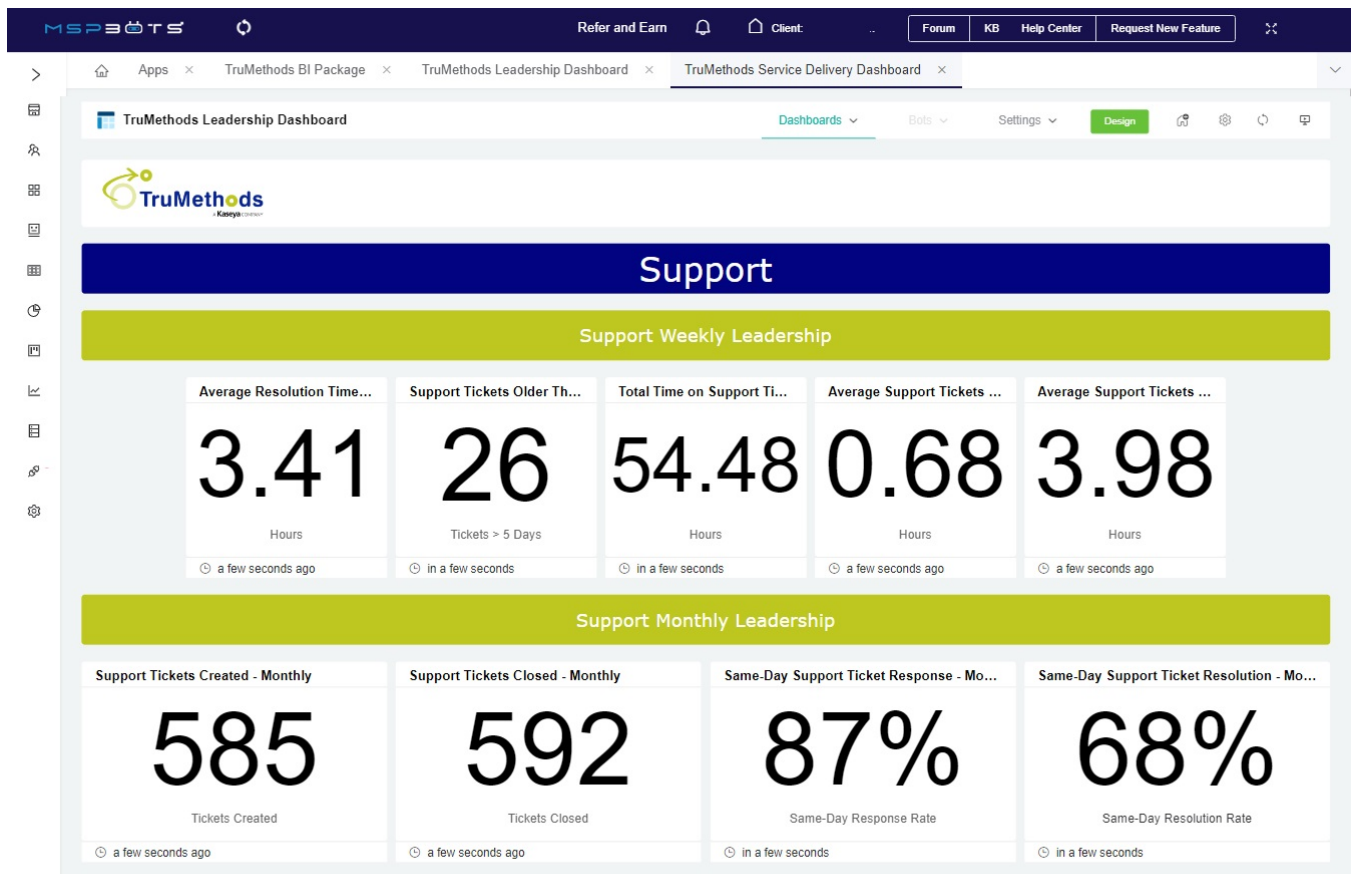
## Leadership Dashboard

The Leadership Dashboard contains data for Support Weekly and Monthly Leadership, Centralized Services, Projects, and Technical Alignment. This dashboard hosts widgets like Average Resolution Time, Average Support Tickets Response Time, and Support Tickets Created and Closed.



## Service Delivery Dashboard

The Service Delivery Dashboard contains widgets for Support, Centralized Services, and Technical Alignment. Some examples of the widgets are Same-Day Support Ticket Response, Centralized Services Ticket Created, and Managed Service Clients.



Financial Dashboard

The Financial Dashboard is a comprehensive tool that provides data and insights into your company's key financial metrics, including metrics for Profit, Revenue, Leverage, and Sales.

## TruMethods Smart Numbers - Financial Dashboard



Date | 2023-04-01 - 2023-06-30

Profit		Revenue	
Net Profit %	Net Profit % - Before Owners Comp	% of Revenue from Services	% of Services from MRR + ORR
43.06%	49.27%	60.52%	79.38%
<small>a few seconds ago</small>	<small>a few seconds ago</small>	<small>a few seconds ago</small>	<small>a few seconds ago</small>
Leverage			
Service Revenue / Associate - Annualized	Service Revenue / Tech - Annualized	All In Seat Price	
97,328	145,992	45.71	
<small>Amount</small>	<small>Amount</small>	<small>AISP</small>	
<small>a few seconds ago</small>	<small>a few seconds ago</small>	<small>a few seconds ago</small>	<small>a few seconds ago</small>
Average MRR Per Agreement	Average ORR Per Agreement	MRR All In Seat Price	
2,927	1,665	36.17	
<small>Amount</small>	<small>Amount</small>	<small>MRR AISP</small>	
<small>a few seconds ago</small>	<small>a few seconds ago</small>	<small>a few seconds ago</small>	<small>a few seconds ago</small>
Sales			
New MRR + ORR	Lost MRR + ORR   Churn	Net MRR Gain	
5,384	-4,975	409	
<small>Amount</small>	<small>Amount</small>	<small>Amount</small>	
<small>a minute ago</small>	<small>a minute ago</small>	<small>a minute ago</small>	
Dials / Appointments	First Appointments	Sales Call Close %	
273.92	12	25.00%	
<small>Ratio</small>	<small>Count</small>	<small>Sales Call Close</small>	
<small>a minute ago</small>	<small>a minute ago</small>	<small>a minute ago</small>	

Below are the widgets for the metrics and the computations for each.

### • PROFIT

- **Net Profit %** - This card widget shows the percentage of Net Profit to Total Revenue for the selected date range.

Computation:

$$\frac{\text{Net Profit}}{\text{Total Revenue}} \times 100$$

- **Net Profit % Before Owner's Comp** - This card widget is calculated as the percentage of Revenue less Expenses plus Drawdowns divided by the Total Revenue for the selected date range.

Computation:

$$\frac{\text{Revenue} - \text{Expenses} + \text{Drawdowns}}{\text{Total Revenue}} \times 100$$

### • REVENUE

- **% of Revenue from Services** - This card widget shows the percentage of the sum of the Revenue from Services over the Total Revenue for the selected date range.

Computation:

$$\frac{\text{NRR} + \text{MRR} + \text{ORR}}{\text{Total Revenue}} \times 100$$

- **% of Services from MRR + ORR** - This card widget shows the percentage of the sum of the Services from MRR and ORR over the Total Revenue for the selected date range.

Computation:

$$\frac{\text{MRR} + \text{ORR}}{\text{Total Revenue}} \times 100$$

- **LEVERAGE**

- **Service Revenue / Associate - Annualized** - This card widget shows the average Service Revenue per Associate for the selected date range.

Computation:

$$\frac{\text{NRR} + \text{MRR} + \text{ORR}}{\text{\# of Associates}}$$

- **Service Revenue / Tech - Annualized** - This card widget shows the average Service Revenue per Tech Associate for the selected date range.

Computation:

$$\frac{\text{NRR} + \text{MRR} + \text{ORR}}{\text{\# of Tech Associates}}$$

- **All-In Seat Price** - This widget displays the average MRR and NRR per seat for the selected date range.

Computation:

$$\frac{\text{MRR} + \text{NRR}}{\text{\# of Seats}}$$

- **Average MRR per Agreement** - This widget displays the average Monthly Recurring Revenue per Agreement for the selected date range.

Computation:

$$\frac{\text{Total MRR}}{\text{\# of Agreements}}$$

- **Average ORR Per Agreement** - This widget displays the average of Other Recurring Revenue per Agreement for the selected date range.

Computation:

$$\frac{\text{Total ORR}}{\text{\# of Agreements}}$$

- **MRR All-In Seat Price** - This widget displays the average Monthly Recurring Revenue per Seat for the selected date range.

Computation:

$$\frac{\text{Total MRR}}{\text{\# of Seats}}$$

- **SALES**

- **New MRR + ORR** - This card widget shows the total Monthly Recurring Revenue (MRR) and Other Recurring Revenue (ORR) during the selected date range.

Computation: **Total New MRR + ORR**

- **Lost MRR + ORR | Churn** - This card widget displays the total Monthly Recurring Revenue (MRR) and Other Recurring Revenue (ORR) lost during the selected date range.

Computation: **Total Lost MRR + ORR**

- **Net MRR Gain** - This card widget calculates the net difference in the sum of the Monthly Recurring Revenue (MRR) and Other Recurring Revenue (ORR) from the sum of revenue during the selected date range.

Computation:

$$\frac{(\text{New MRR + ORR}) - (\text{Lost MRR + ORR})}{\text{Churn}}$$

- **Dials / Appointments** - This card widget shows the ratio of the total dials to the total appointments made during the selected date range.

Computation: **Total Dials / Total Appointments**

- **First Appointments** - This card widget displays the total count of initial appointments scheduled during the selected date range.

- **Sales Call Close %** - This card widget calculates the percentage of new agreements closed successfully in relation to the total count of first appointments made during the selected date range.

Computation:

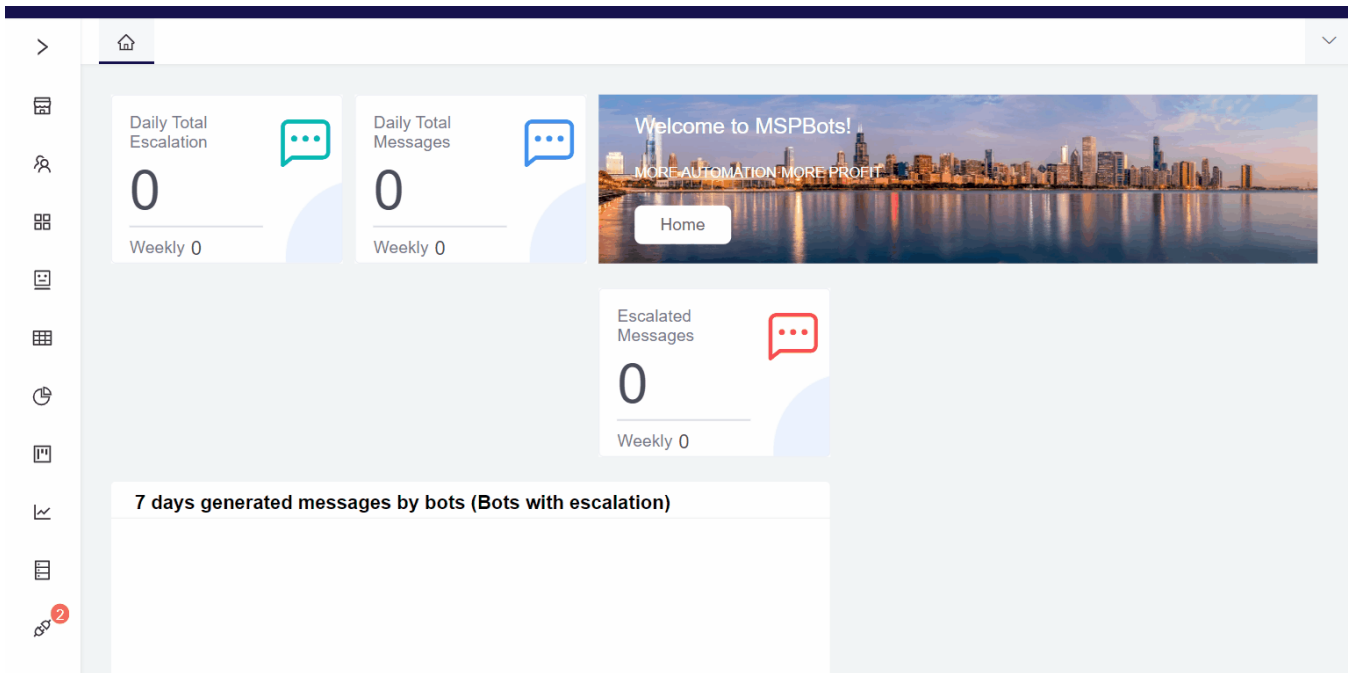
$$\frac{\text{Total Count of New Agreements}}{\text{Total Count of First Appointments}} \times 100$$

The data shown in the dashboards are based on the data you enter in the TruMethods Smart Numbers Settings form. Please see [Configure TruMethods Settings](#) for more information about this form.

## How can I access TruMethods Smart Numbers?

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You can open TruMethods on the MSPbots app by going to **Apps** on the menu and clicking **TruMethods BI Package** on the Apps tab.



## How can I start using the TruMethods app?

TruMethods Smart Numbers comes with your MSPbots app. You don't need to install it to be able to start using the dashboards and widgets to improve and respond to your service delivery, projects, support, and leadership needs. After you connect your PSA and software, configure your TruMethods settings, and validate the dashboard data, you are ready to start your TruMethods experience!

### 1. Connect your PSAs and software to MSPbots

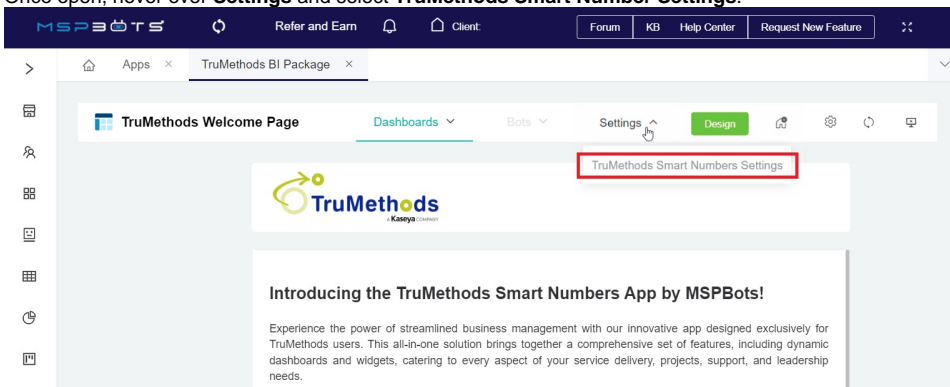
The TruMethods app work on the following PSAs and software. Click your PSAs and software on the table to view the guide on how to connect these to MSPbots.

PSA	RMM	
<a href="#">ConnectWise PSA</a>	<a href="#">Auvik</a>	<a href="#">Kaseya VSA</a>
<a href="#">Autotask</a>	<a href="#">ConnectWise Automate</a>	<a href="#">N-able N-Central</a>
<a href="#">Kaseya BMS</a>	<a href="#">Datto RMM</a>	<a href="#">NinjaOne</a>

### 2. Configure your TruMethods settings

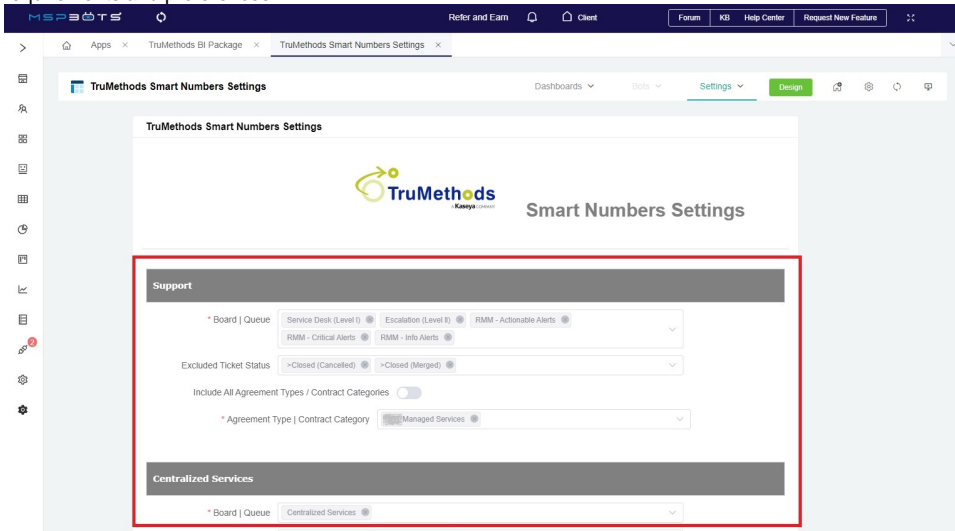
After successfully connecting your PSAs, you are now ready to configure your TruMethods settings. Do the following steps to configure the settings:

1. Open the TruMethods Smart Numbers app.
2. Once open, hover over **Settings** and select **TruMethods Smart Number Settings**.

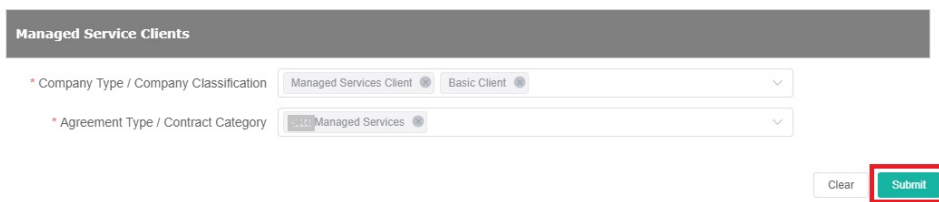


3. When the TruMethods Smart Number Settings tab opens, you will see sections or categories for KPI configurations. Each section has options to include or exclude specific filters or settings. Review the available options and select the filters you want to include or exclude based on your

requirements and preferences.



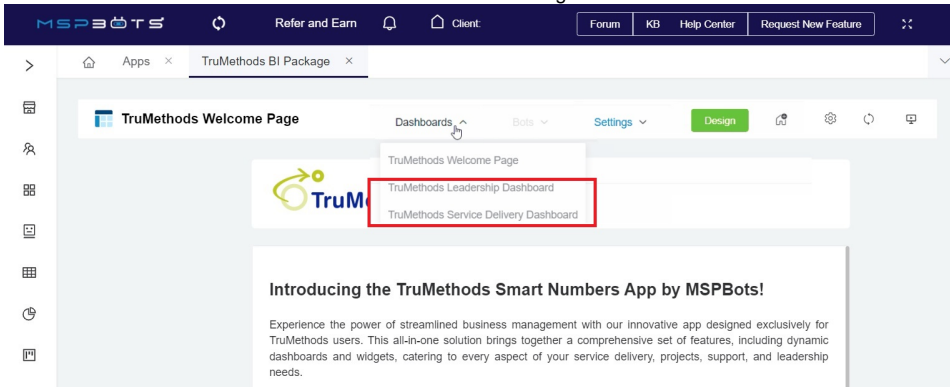
4. Click **Submit** to save.



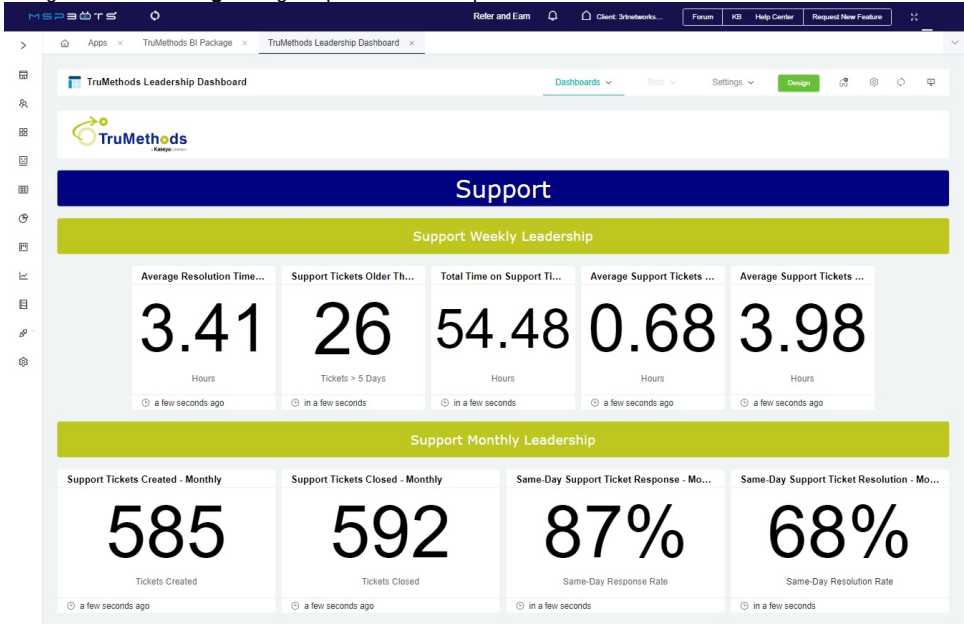
### 3. Validate your TruMethods data

You are ready to validate the data on your reports after configuring the settings. Do the following steps:

1. Open the TruMethods Smart Numbers app.
2. Hover over **Dashboards** and select the dashboard for checking.



3. Review the data on the report and verify if the values are correct and presented according to your needs. If it is not, adjust or review your configurations in **Settings** using the procedure in Step 2 above.



Do these steps for both the Leadership and Service Delivery dashboards.

For more information on MSPbots and how it has been a game changer for many MSP businesses, view the [MSPbots Demos, Trainings, and Webinars](#).  
For more information on TruMethods, read the [Who We Are - TruMethods](#) page or visit the [TruMethods website](#).