



## Analytics

Welcome to QuickTrac the #1 automotive business improvement, team development, and reporting tool. ANALYTICS will supply you with a wealth of information to benefit your business. ANALYTICS helps you measure your profit-making performance. You can view trending and correlating data which will assist you in pinpointing any problem areas and will give you the ability to change things while it can still make a difference to your bottom line. ANALYTICS will show you where you have been which will help you map where you want to be.

**Note:** Only verified work appears in Analytics. You are not required to enter actuals to verify a work order but it is highly recommended. Without actuals a comparison of projected to actual cannot be done in the Analytics. This comparison is an important key number in determining the health of the business so it is strongly suggested that the actual be entered during the verify process.

ANALYTICS can be accessed from the main shop page by selecting ANALYTICS from the Menu.

The screenshot shows the QuickTrac web application interface. At the top left is the QuickTrac logo. Below it is a navigation menu with links: HOME, COMPACT, TOOLS, OPTIONS, VERIFY, ANALYTICS (highlighted with a red bar), and SCOREBOARD. To the right of the menu is the user information: Sallys Shop, 09/26/08, User: Sally, and a LOGOUT button. The main content area is titled 'Reports - Step 1 - Specify Date Range'. It is divided into two sections: 'Specific Date Range' and 'Pre-set Date Range'. The 'Specific Date Range' section has two input fields: 'Work Order Start Date' and 'Work Order End Date', each with a calendar icon to its right, and a 'Continue...' button below them. The 'Pre-set Date Range' section has a list of radio button options: 'Last 7 Days' (selected), 'Last 14 Days', 'Last 21 Days', 'Last 30 Days', 'Last 60 Days', 'Last 90 Days', 'Last 180 Days', and 'Last 365 Days'. To the right of these options are radio buttons for 'Shown as Days', 'Shown as Weeks', and 'Shown as Months'. A 'Continue...' button is at the bottom of this section. An arrow points from the 'ANALYTICS' menu item to the 'Pre-set Date Range' section.

To select the weeks of data to view in ANALYTICS, use either the specific date range box on the left hand side or the PRE-SET DATE RANGE box on the right hand side.

To use the SPECIFIC DATE RANGE BOX, select a START DATE and also select an END DATE from the calendar icons provided. Click on the CONTINUE button to confirm.

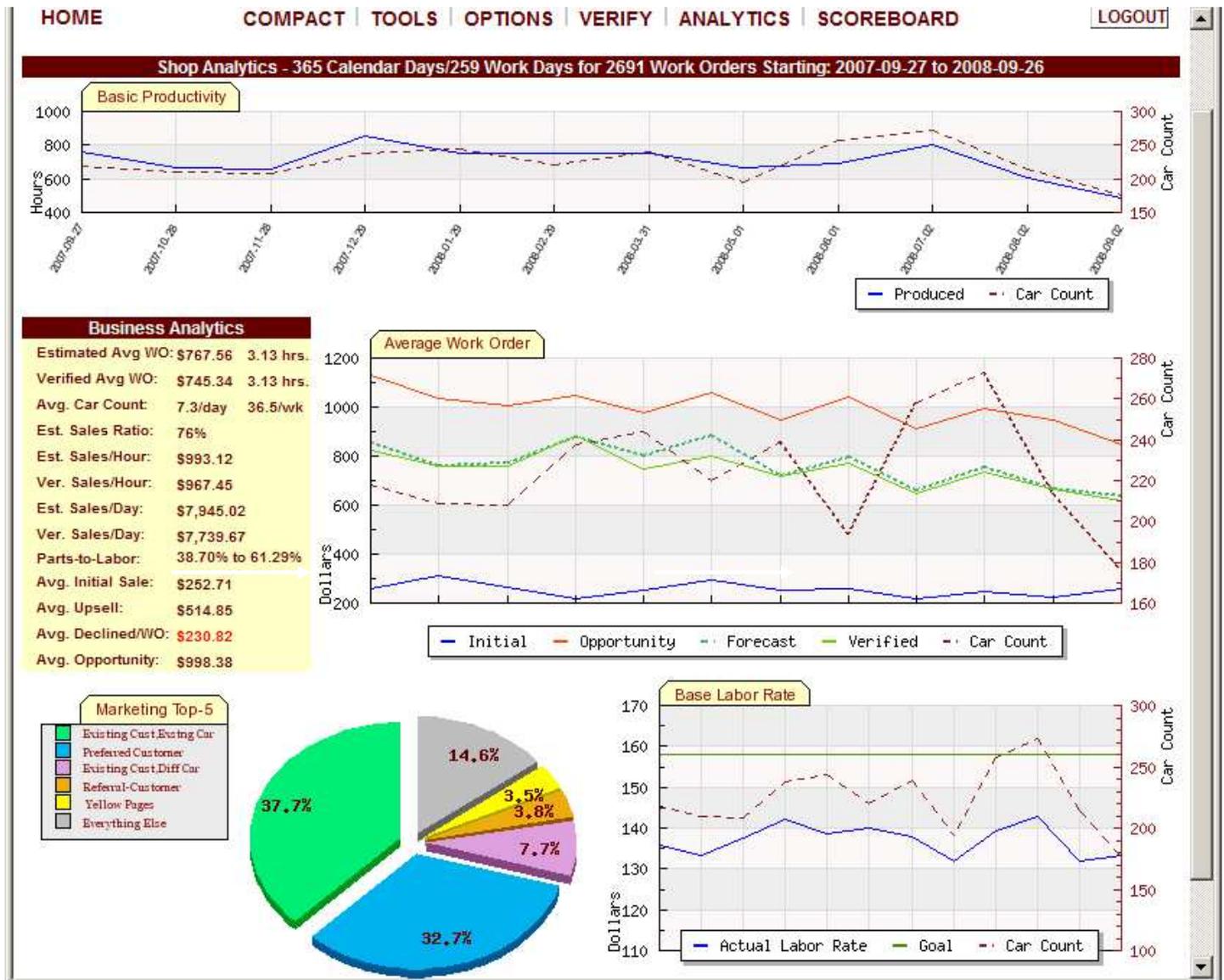
To use a PRE-SET DATE RANGE to view ANALYTICS, click on one of the preset date ranges. The PRE-SET DATE RANGES for the Last 14, 21, 30, and 180 days provides the option of showing either as days or weeks. Click on the CONTINUE button when you are ready to view ANALYTICS.

# Analytics

ANALYTICS will display the amount of work orders and the specified dates being analyzed at the top of the page. Key information in both graphical and text form will be displayed.

A BASIC PRODUCTIVITY LINE CHART, BUSINESS ANALYTICS, AVERAGE WORK ORDER LINE CHART, MARKETING TOP-5 legend, AD CODES (marketing) PIE CHART, & BASE LABOR RATE LINE CHART are provided.

The BASIC PRODUCTIVITY LINE CHART at the top shows PRODUCED HOURS as a solid blue line and CAR COUNT as a dotted red line. The X axis shows units in HOURS and the Y axis shows units as CAR COUNT.



# Analytics

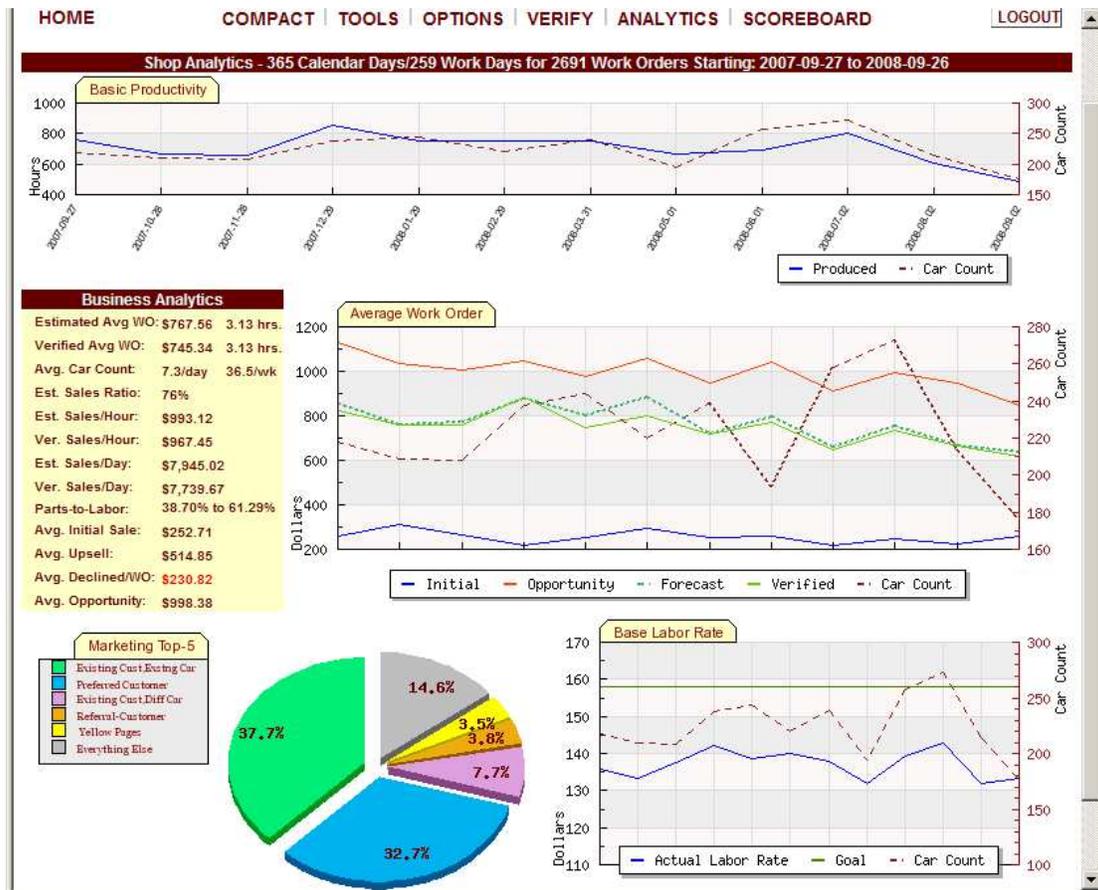
BUSINESS ANALYTICS compiles the information entered by all your employees to supply you with historical information you can use to analyze the health of your business within the time frame selected. If work orders are not verified, then the MARKETING TOP-5 and BASE LABOR RATE chart reports will be unavailable. Details of the information provided in Business Analytics are provided below:

ESTIMATED AVG WO is shown in dollars and hours. The estimated average work order is the average dollar amount sold per work order. It is also shown as an average amount of hours sold per work order.

VERIFIED AVERAGE WO is also shown in dollars and hours. The verified average work order shows the average dollar amount sold per work order only from work orders that have been verified by your shop. It is also shown as an average amount of hours sold per work order. **Note:** If work orders are not being verified consistently and accurately, then these values will be zero or inaccurate.

Average car count is the average number of work orders that came through your shop. It is shown as a daily and weekly amount.

Estimated Sales Ratio: The rate of work sold of the total opportunity (sold + unsold) found by techs and presented to the customer.



# Analytics

ESTIMATED SALES/HOUR is the estimated dollars sold by sales team for each hour shop is open.

VERIFIED SALES/HOUR is the actual number of dollars that your shop brings in for each hour shop is open. **Note:** If work orders are not being verified consistently and accurately, then these values will be zero or inaccurate.

ESTIMATED SALES/DAY is the estimated dollars sold by sales team for the day.

VERIFIED SALES/DAY is the actual number of dollars that your shop brings in for the day. **Note:** If work orders are not being verified consistently and accurately, then these values will be zero or inaccurate. **Note:** If work orders are not being verified consistently and accurately, then these values will be zero or inaccurate.

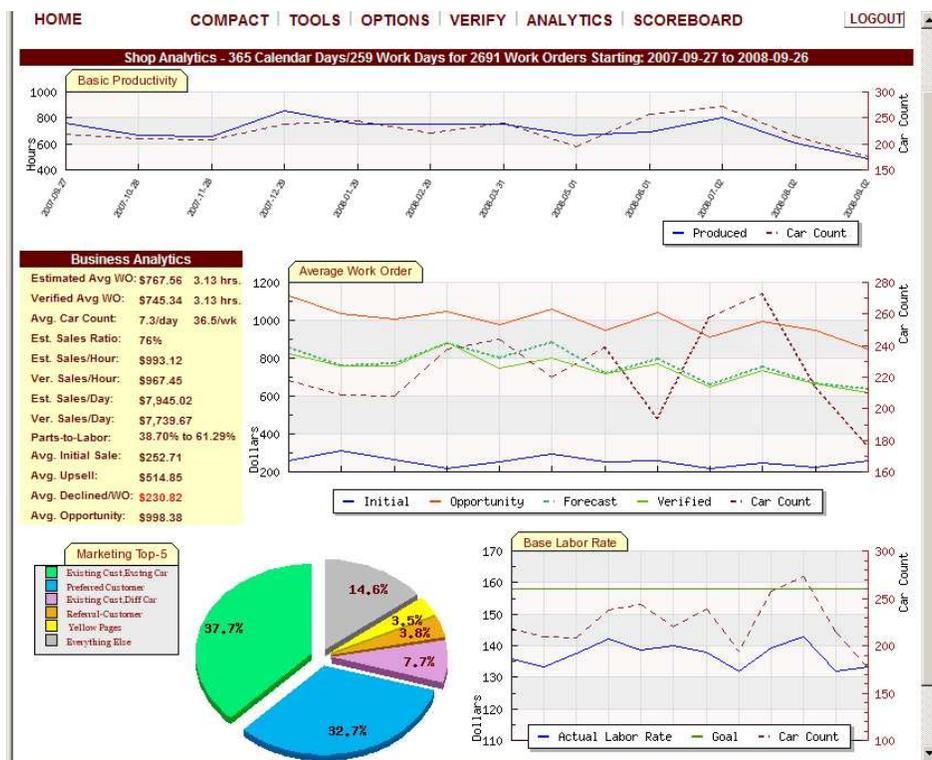
PARTS-TO-LABOR shows for every \$1 spent what percentage are parts and what percentage is labor.

AVERAGE INITIAL SALE is the average initial dollar amount that your sales team sold for the time period you selected.

AVERAGE UPSELL is the average upsell dollar amount that your sales team sold for the time period you selected

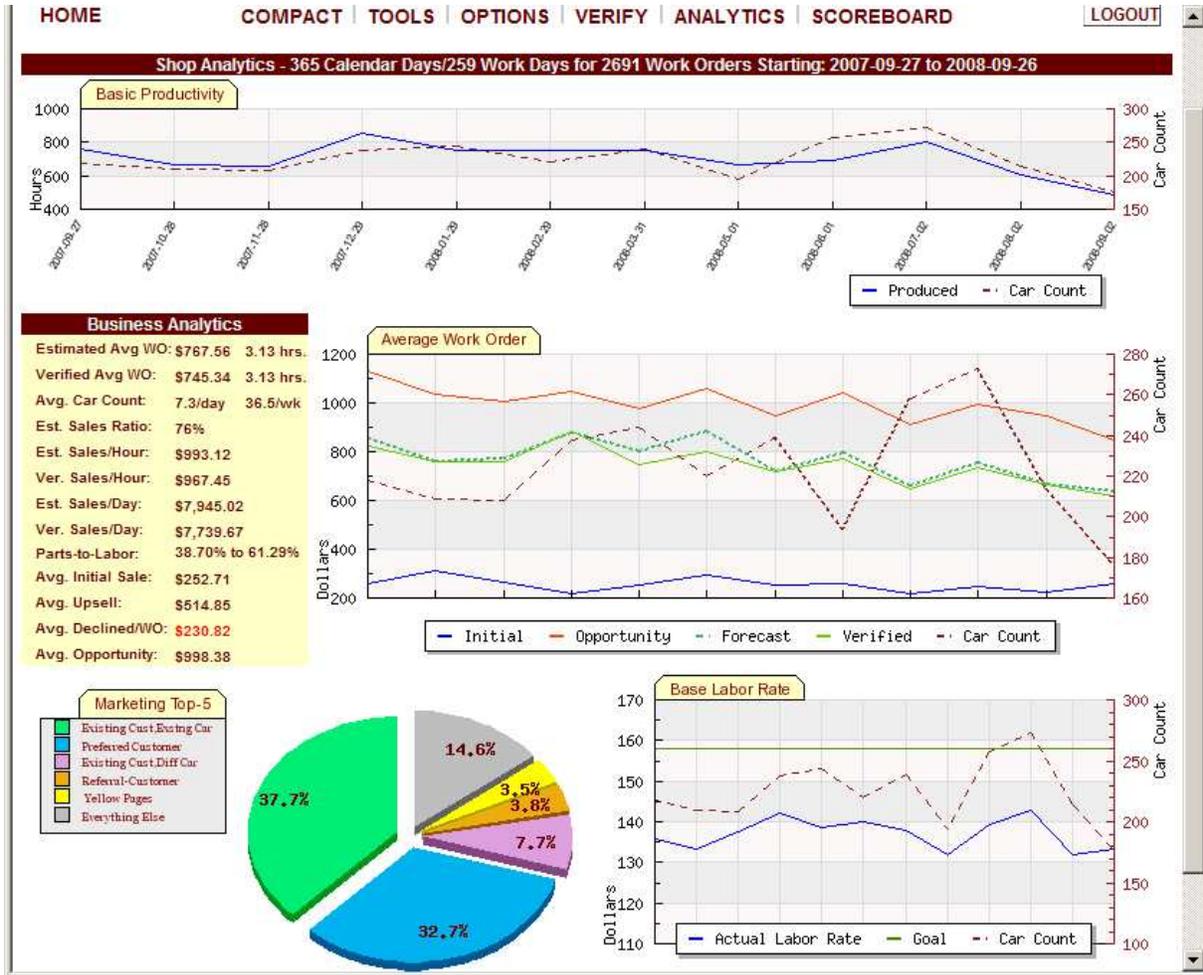
AVERAGE DECLINED WORK ORDER is the average declined dollar amount per work order. Declined dollars will provide you with areas to focus on in your business to capture that lost revenue.

AVERAGE OPPORTUNITY is the average opportunity dollar amount per work order for the time period you selected.



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The AVERAGE WORK ORDER line graph displays information on INITIAL, OPPORTUNITY, FORECAST, VERIFIED, and CAR COUNT. INITIAL appears as a blue line and is the initial dollar amount that your Service Advisor Team sold. Opportunity appears as a red line and is the sum of your Actual Sale and your Declined Work. Forecast is the difference between the Service Advisor estimate and the actual dollar amount paid by customers and obtained through the verification process. Verified is the actual dollar amount recorded from verified work orders, and the car count is the amount of work orders that came through your shop.



The MARKETING TOP-5 legend displays the top five Ad Codes. Ad Codes are data regarding how well your marketing is working (who comes from where and what percentage of your business they are). The grayed colored slice represents all other ad codes. This report is cross-indexed with car count. Click anywhere within the ad code pie chart area to see ad code details.

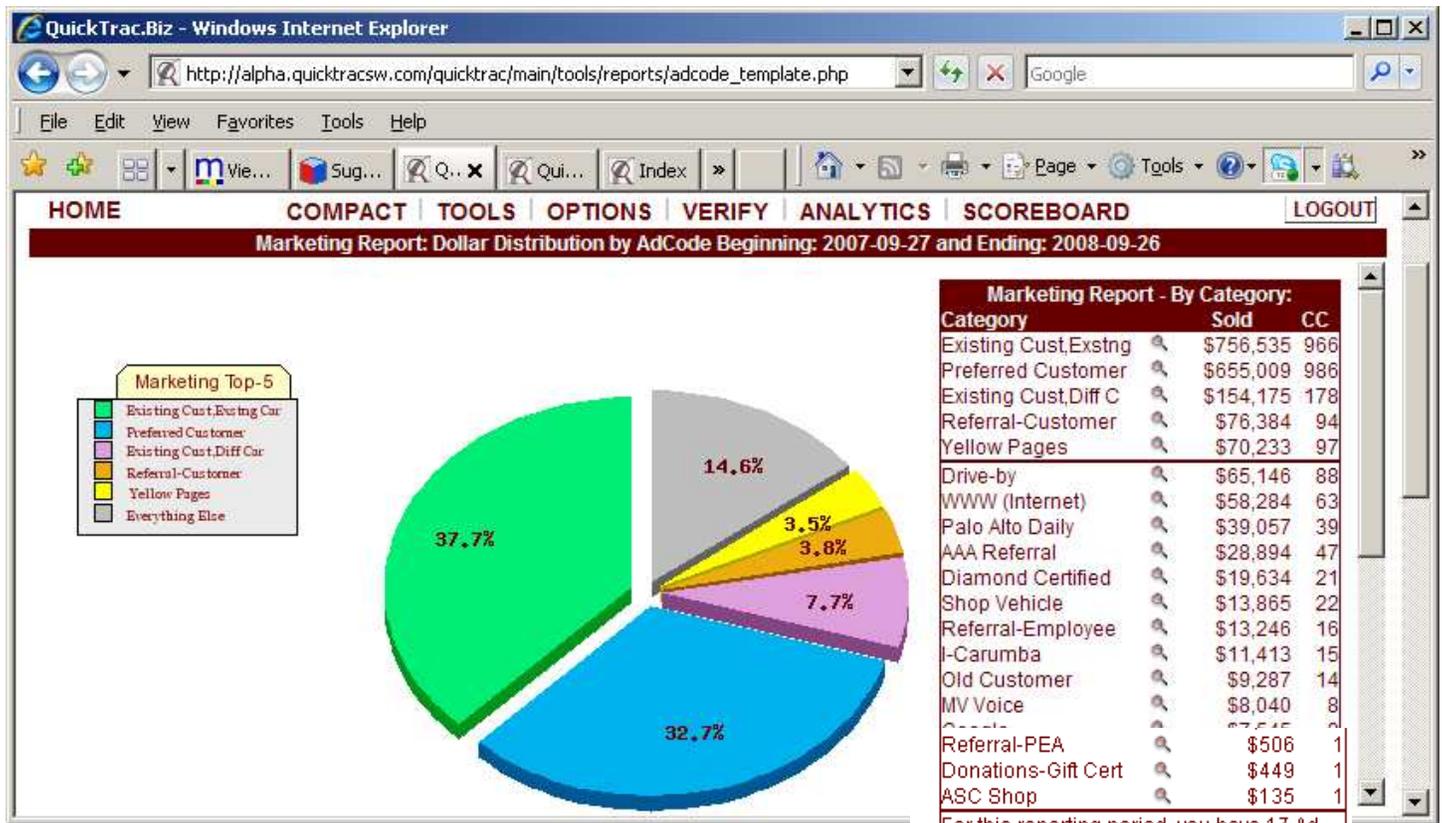
**Note:** If shop is not verifying, then the Marketing Top-5 pie chart and Base Labor Rate (last two on the bottom of the page) reports will be unavailable.

Click anywhere within the ad code pie chart area to see ad code details.

# Analytics

Click on a “slice” from the Marketing Top-5 (Ad Codes) pie graph. This will allow you to view that ad code activity.

On the right hand side of the marketing top-5 pie chart you will see the marketing report–by category box. The top-5 ad codes are provided at the top. Each category shows the ad code’s total sales and car count for the time period you selected. Below the top-5 ad codes you will see the remainder of the ad code categories that reported activity in order of the top selling ad code.



[Return to Reports Page](#)

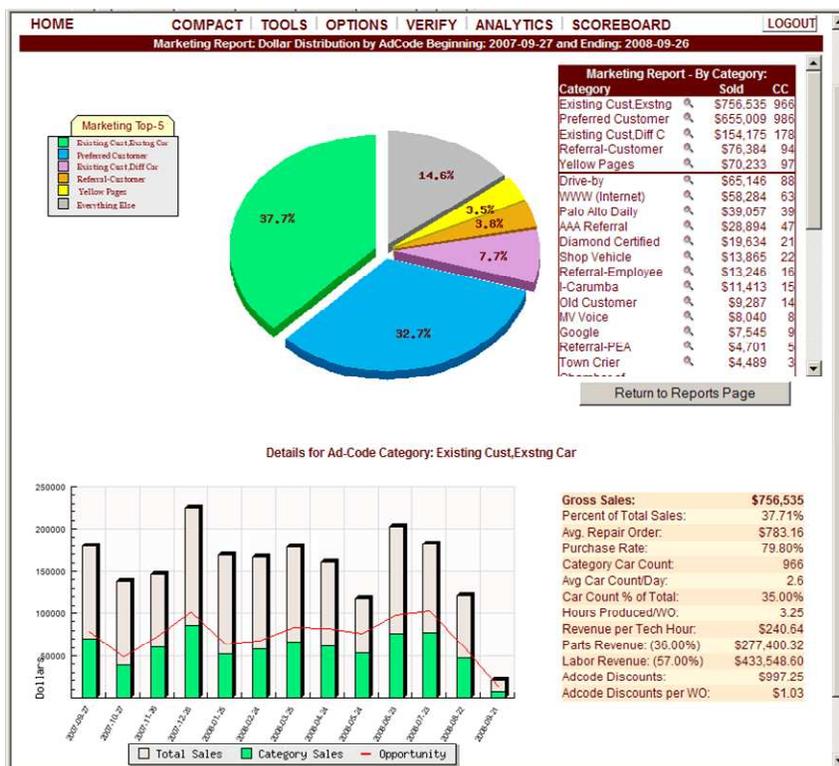
# Analytics

Click on a slice from the pie chart to see that marketing's sales activity and opportunity across the time period you selected. You will also see the GROSS SALES amounts on the bottom right hand side.

The bar graph on the bottom left hand side will help you see trends and correlations for the MARKETING-CODE you select. The colored area in each bar graph represents the total amount of sales for that week. The red line represents opportunity, which is the sum of your Actual Sales and your Declined Work.

**Note:** Each whole bar represents a week's total sales.

The GROSS SALES on the bottom right hand side displays the total dollars sold only for the marketing category selected. All amounts below the gross sales also only show for the marketing category selected. The PERCENT OF TOTAL SALES shows the percentage sold of the total sales. The AVG. REPAIR ORDER shows the average dollar amount sold for each work order. The purchase rate shows a percentage of work sold of the total opportunity. The CATEGORY CAR COUNT shows the total amount of cars coming through your shop. The AVG. CAR COUNT/DAY shows the average amount of cars coming through your shop per day. The HOURS PRODUCED / WO shows the amount of hours produced for each work order. The REVENUE PER TECH HOUR shows the dollar amount of revenue brought in for each technician for every hour of your business week. The parts revenue represents the total percentage of parts on work orders and includes the dollar amount collected for parts. The labor revenue represents the total percentage of labor on work orders and includes the dollar amounts collected for labor. The ADCODE DISCOUNTS shows the total dollar loss from discounts given for that specific category and also shows the ADCODE DISCOUNTS PER WO which averages the loss for each work order by discounts given for that specific category.



Click on the RETURN TO REPORTS PAGE button

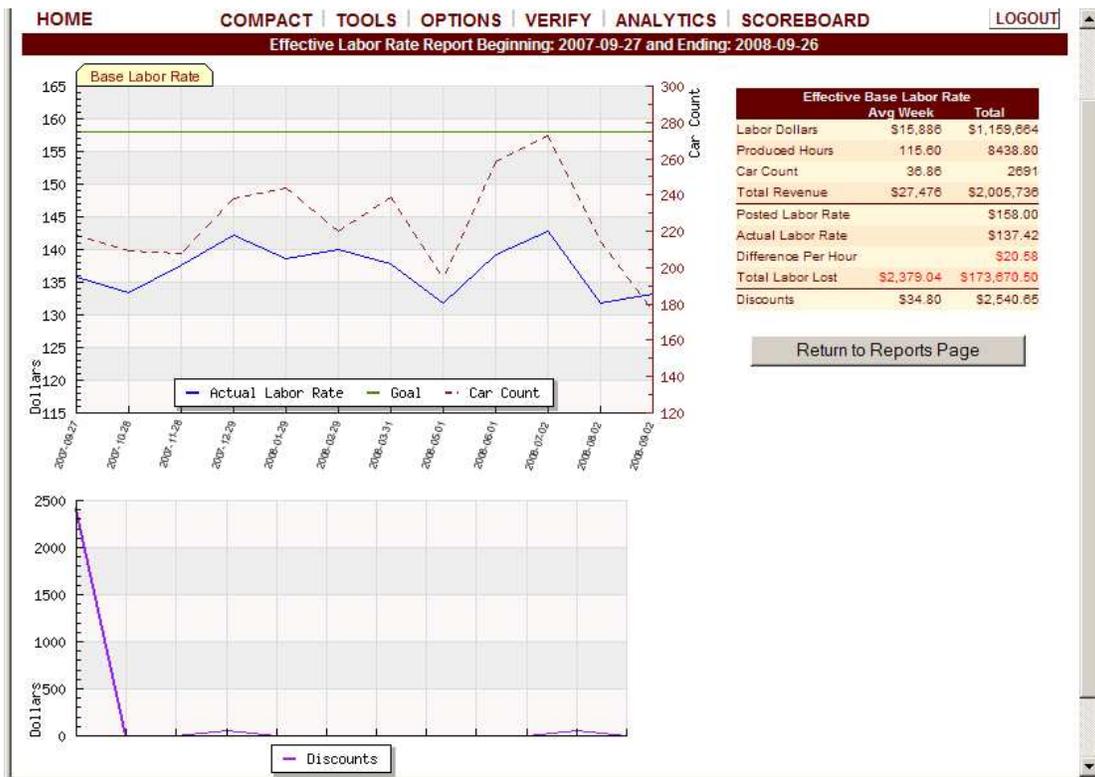
# Analytics

Click on the BASE LABOR RATE report.

To obtain the BASE LABOR RATE REPORT details you must enter ACTUALS in VERIFY. The BASE LABOR RATE line chart shows the ACTUAL LABOR RATE, GOAL, and CAR COUNT. The ACTUAL LABOR RATE is represented by the blue line and is the actual and verified amount of dollars per hour that you collected each week during the time period selected. The GOAL represented by the green line is the labor rate that you entered in QuickTrac as your base labor rate under the OPTIONS > SHOP setup menu. And the CAR COUNT represented by a dotted red line is the amount of work orders that came through the shop for the time period selected.

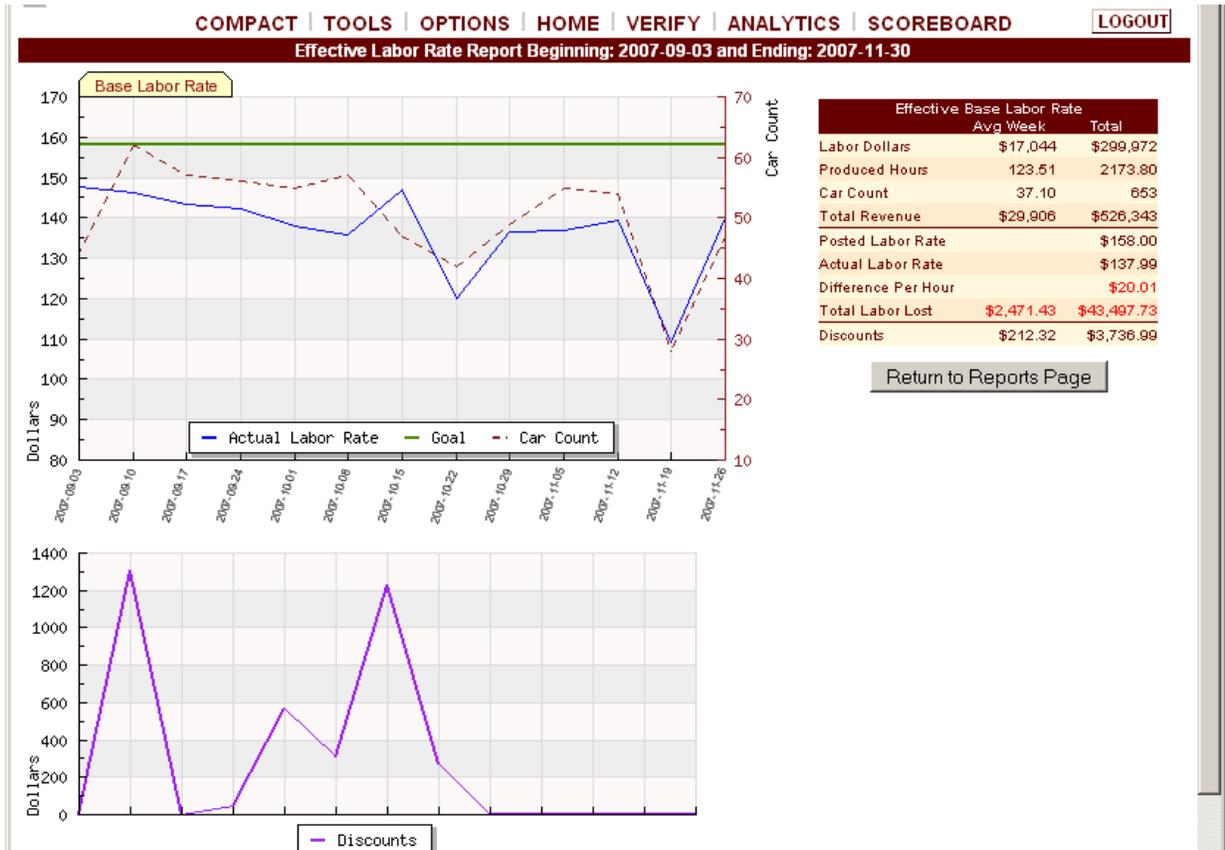
On the right hand side table are the ACTUAL/BASE LABOR RATE details. The first row shows LABOR DOLLARS, PRODUCED HOURS, CAR COUNT, and TOTAL REVENUE. LABOR DOLLARS are the AVERAGE WEEKLY LABOR dollar amount collected and the TOTAL LABOR dollars collected for the time period selected. PRODUCED HOURS are the AVERAGE WEEKLY PRODUCED hours and the TOTAL PRODUCED hours for the time period you selected. CAR COUNT is the AVERAGE WEEKLY amount of work orders that came through the shop and the TOTAL amount of work orders that came through your shop for the time period you selected. And lastly, TOTAL REVENUE is the AVERAGE WEEKLY TOTAL REVENUE collected and the TOTAL REVENUE collected for the time period you selected.

The second row shows the POSTED LABOR RATE, ACTUAL LABOR RATE, DIFFERENCE, and TOTAL LABOR LOST. The POSTED LABOR RATE is the shops BASE LABOR RATE (Goal). Your shop's BASE LABOR RATE was manually entered during the initial shop setup in SHOP SETTINGS (and can be reset in options). The ACTUAL LABOR RATE is what you actually collected from the customer for the time period you selected. The DIFFERENCE shows the difference between your POSTED LABOR RATE and your ACTUAL LABOR RATE. And TOTAL LABOR LOST shows your AVERAGE WEEKLY TOTAL LABOR LOST/GAINED and TOTAL LABOR LOST/GAINED for the time period you selected.



# Analytics

The third row shows DISCOUNTS for the selected time period. DISCOUNTS shows the AVERAGE WEEKLY DISCOUNTS given to customers and TOTAL DISCOUNTS given to customers for the time period you selected.



The DISCOUNTS line chart shows discount dollar amounts given to customers (represented by a purple line in the discount graph). Discounts may have been given for coupons or promotions, customer satisfaction, valued customers, shop error, or other reasons. Discounts must show up in the program in order to quickly identify lost sources of revenue and expense trends and is also an important area for creating profitability that is often overlooked in business.

Click on the RETURN TO REPORTS PAGE button when you are ready to view other reports.