

## Service Advisor - Create a New Work Order

**Note:** Immediately upon creating a work order (when vehicle is in the shop and waiting to be dispatched) or completing a sale, it is important that it is entered into QuickTrac. This allows real time tracking.

- 1) To open QuickTrac, double click on the QuickTrac icon. Or type in [www.quicktracsw.com](http://www.quicktracsw.com) in the web address field in your browser.



- 2) Next, click on the LOGIN link from the menu.



"Discipline yourself to do the things you need to do when you need to do them, and the day will come when you will be able to do the things you want to do when you want to do them!" - Zig Ziglar

September 3, 2008

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**Why QuickTrac?**

*Make your business more successful and easier to manage*

QuickTrac is a field-proven business scanner currently being used by some of the most successful automotive repair companies to monitor and improve their business.

*Manage your business by the numbers and watch it thrive*

Your sales and production performance is available at a glance allowing owners, managers, and employees to constantly adjust their behavior to assure goals are met.

[View Details Here](#)

*Boost your team's productivity, sales, and morale*

QuickTrac lets your Service Advisors and Technicians see and manage their own performance. The result: enhanced sales and productivity, increased employee satisfaction and a winning spirit in your company.

**Customer Videos & Success Stories**

- Tony & Darcy Blazek Blazek Diagnostics
- Nate Smith Nate Smith's Optimal Auto
- Rami Derhy Signal Garage
- Maylon Newton Educational Seminars Institute

**See Webinar Broadcasts click here**

"QuickTrac is like a scan tool for my business. I couldn't do without it!"  
Nate Smith's Optimal Auto, Santa Cruz, CA

"I am really glad we got QuickTrac. We saw immediate improvements in Sales (20%) and Productivity (28%) after using it." Nikki Avers-Avers Automotive, Santa Cruz, CA

**CARS 2007 leading To The Next Level**

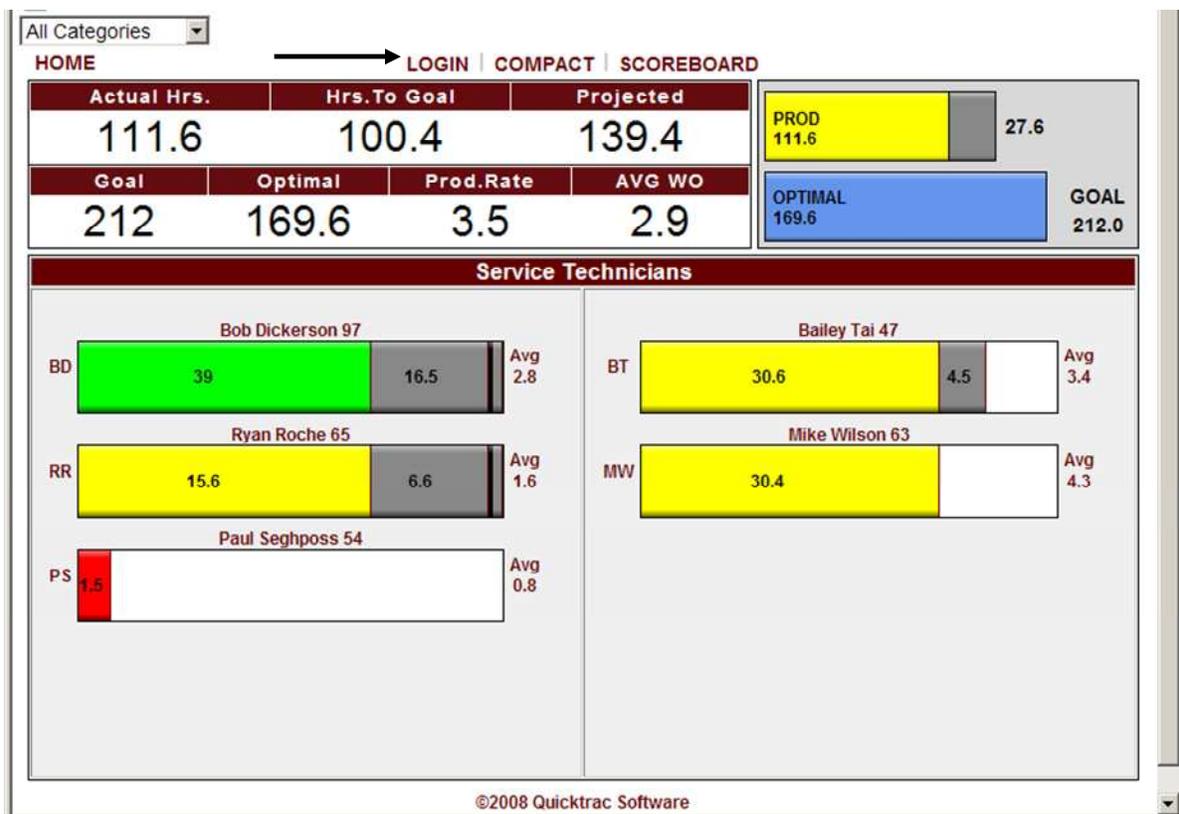
**Listen To Industry Experts**  
VICTORWATCH  
YOUR SOURCE FOR INSIDE AUTOMOTIVE INFORMATION

## Create a New Work Order

- 3) Enter your shop's USER NAME and PASSWORD and click on the OK button:  
The shop user name and password is created during shop setup and is also sent in email for reference to the person who signed up and registered for a QuickTrac account.



- 4) You will see a page with all the Technicians. This is the Technicians Main Page.  
To get to the SERVICE ADVISOR MAIN PAGE to create work orders, click on the LOGIN link at the top of the page.

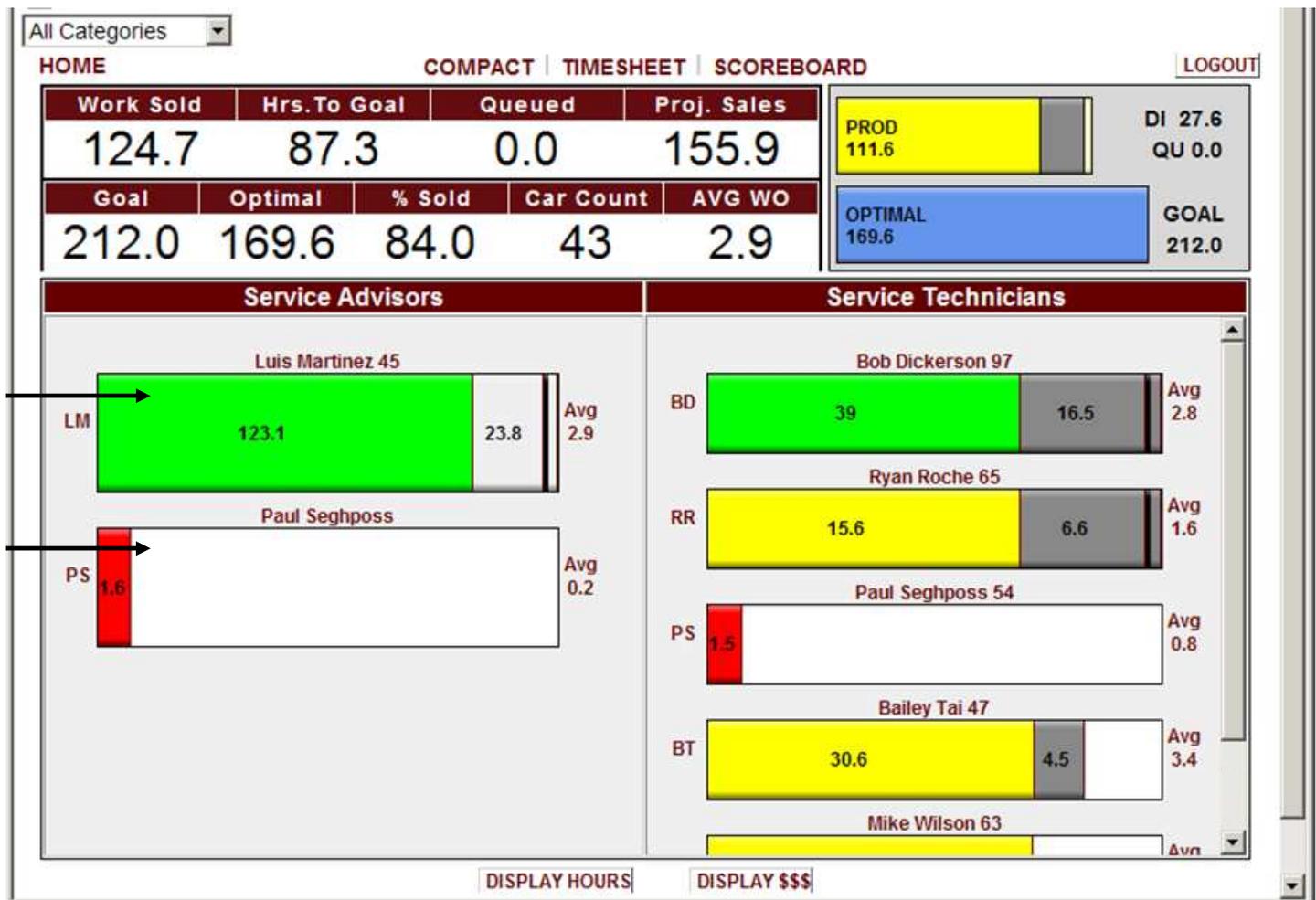


## Create a New Work Order

- 5) Enter your Service Advisor USER NAME and PASSWORD. (Technicians access is limited to the Technician Productivity Page seen on page 2.) Once on the Service Advisor Main page you can see all the Service Advisor and Technician bar graphs.

USERNAME:   
 PASSWORD:

- 6) Next, click in the SERVICE ADVISOR BAR GRAPH.



# Create a New Work Order

- 7) To CREATE A NEW WORK ORDER, enter a new work order number on the left hand side in the  SEARCH/NEW WO box. A work order can be 4 to 10 characters long.

HOME
COMPACT | TIMESHEET | SCOREBOARD
LOGOUT

WorkOrders

 ALL WORK DISPATCHED

Dispatched WorkOrders

Sorted By:

New  Old

Active WOs

- 4850 - 2.0 hrs
- 4848 - 1.5/0.0 hrs
- 4840 - 4.3 hrs
- 4832 - 0.4 hrs
- 4834 - 16.0 hrs
- 4829 - 2.0 hrs
- 4808 - 4.6 hrs
- 4793 - 9.0/0.0 hrs
- 4733 - 1.0 hrs
- 4681 - 2.0 hrs

Thursday, 2008-09-25

SA Daily Goal: 33.9hrs. Progress: 79%, W/O Count: 12

27.0

6.9

Service Tech	Production Time			PR	CC	AV
B Dickerson 97:	6.9	16.5		71%	4	5.8
B Tai 47:	3.6	4.0	8.5	79%	7	2.3
P Seghposs 54:	4.8			0%	0	0.0
M Wilson 63:	6.5	1.5	1.6	83%	2	4.0
R Roche 65:	2.3	1.1	6.1	70%	8	1.1

Search/New WO:



Work Sold	Hrs. To Goal	% Sold	Proj. Sales
123.1	46.5	83.8	153.9

SOLD  
123.1

23.8

Goal	Optimal	Declined	Car Count	AVG WO
169.6	135.7	23.8	43	2.9

OPTIMAL  
135.7

GOAL  
169.6

## Create a New Work Order

**Note:** QuickTrac Version 2.4 now has the ability to add “Notes” relevant to a particular work order. Simply click on the folder icon next to the work order number at the top center of the page.

8a) The work order number entered appears at the top center of the page. Now, select the appropriate AD CODE for your new work order by selecting it from the **A** AD CODE drop down box (see below). AD CODES can be added or changed only when logged in as a Manager or Owner under OPTIONS and then in AD CODES. Second, select the **B** SOLD BY name to select who sold this work order so that they can get credit for that sale. Third, select the appropriate **C** CATEGORY, SOURCE, and BRAND which may fall under either customer pay, non-billable, \*internal, or \*mfg warranty. (See the Work Codes user guide for more information on Categories, Sources, and Brands.) Fourth, specify which technician should receive credit for the work being recorded in the **D** TECH CREDITED drop down box (credit for the customer pay or the non-billable work). Fifth, enter the estimated initial sold hours in the **E** SOLD HOURS box. And sixth, enter the estimated initial sold dollars in the **F** SOLD DOLLARS box (non-discounted dollar amount which includes parts, labor, tax, everything!). Click on the CREATE WO button to confirm the creation of the work order. (Once you click on the CREATE WO button you can dispatch that time to the technician/s. Dispatching Time explained on page 7)

**Note:** The AD CODE box by default displays "SELECT AD-CODE". This forces the SA to manually select the AD CODE for each work order created. If the shop Manager/Owner prefers the default AD CODE to be set to the most-frequently-used AD CODE then the Manager/Owner will need to change this through via OPTIONS > SHOP > AD CODE DEFAULT. It is recommended to have the default AD CODE menu set to “OFF” (unchecked).

Work Sold	Hrs. To Goal	% Sold	Proj. Sales
8.9	188.3	100.0	44.5
Goal	Optimal	Declined	Car Count
197.2	39.4	0.0	10

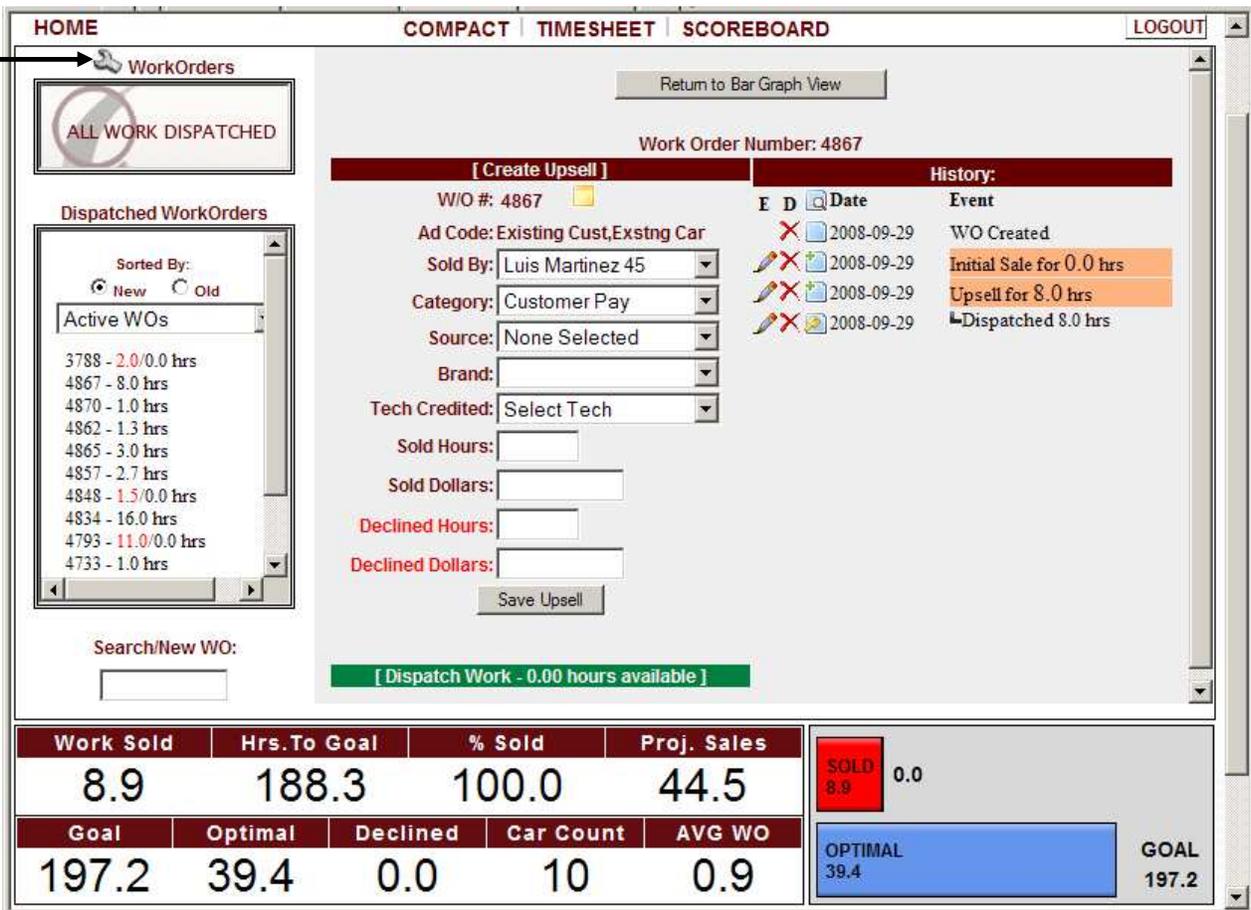
AVG WO	GOAL
0.9	197.2

\* New shops are given four base categories: customer pay, non-billable, \*internal, or \*mfg warranty. (\*two of these categories are set to active for dealerships and inactive for independent shops.) Independent shops can activate these categories as necessary. (See the Work Codes user guide for more information on Categories, Sources, and Brands.)

## Create a New Work Order

- 8b) If you do not dispatch the work order to a technician, the work order will display in the top  WORK ORDERS box under the wrench icon to remind the service advisor to dispatch work to a technician when appropriate.

**Note:** The original work order entry cannot be edited by a Service Advisor. It is important to know how many work orders start out at one price and later downsized or increased. This promotes accuracy for REPORTS. Only a Manager/Owner login account has access to edit the original entry in case of an error.



**HOME** COMPACT | TIMESHEET | SCOREBOARD LOGOUT

**WorkOrders**

Return to Bar Graph View

Work Order Number: 4867

[ Create Upsell ]		History:	
W/O #:	4867	E D @ Date	Event
Ad Code:	Existing Cust,Exstng Car	X 2008-09-29	WO Created
Sold By:	Luis Martinez 45	X 2008-09-29	Initial Sale for 0.0 hrs
Category:	Customer Pay	X 2008-09-29	Upsell for 8.0 hrs
Source:	None Selected	X 2008-09-29	Dispatched 8.0 hrs
Brand:			
Tech Credited:	Select Tech		
Sold Hours:			
Sold Dollars:			
Declined Hours:			
Declined Dollars:			

Save Upsell

[ Dispatch Work - 0.00 hours available ]

Work Sold	Hrs. To Goal	% Sold	Proj. Sales
8.9	188.3	100.0	44.5
Goal	Optimal	Declined	Car Count
197.2	39.4	0.0	10

SOLD	0.0
8.9	
OPTIMAL	GOAL
39.4	197.2

## Create a New Work Order

- 8c) When you are ready to dispatch the work order to a technician, click on the **A** green collapsible DISPATCH WORK BAR and then select a technician from the **B** SERVICE TECHNICIAN drop down box. Then enter the dispatch work HOURS the technician will be spending on this work order. Click on the **C** Dispatch Work button to confirm. If there are hours left to dispatch and you want to dispatch work to another technician on the same work order, select the other technician from the drop down menu and enter the dispatch hours for the other technician. Click on the DISPATCH WORK button. Repeat this step until all sold hours have been dispatched.

The screenshot shows the 'WorkOrders' section of the software. A green bar labeled 'A' is highlighted, and a dropdown menu labeled 'B' is open. A button labeled 'C' is also visible. The interface includes a 'WorkOrders' list, a 'Dispatched WorkOrders' list, and a summary table at the bottom.

Work Sold	Hrs.To Goal	% Sold	Proj. Sales	
31.9	112.1	76.1	32.7	
Goal	Optimal	Declined	Car Count	AVG WO
144.0	140.3	10.0	15	2.1

## Create a New Work Order

8d) If you want to enter new sold work on the same work order number after the Technician inspects the vehicle, you will perform an UPSSELL. Bring up the work order by selecting it from either the **A** WORK ORDERS box, **B** DISPATCHED WORK ORDERS box, or by typing it in the **C** SEARCH/NEW WO: box on the left hand side. Once the work order appears in the center area, select the person that sold the new work in the **D** SOLD BY drop down box. Then select **E** the CATEGORY, SOURCE, and BRAND if any. Specify which technician should receive credit for the work being recorded in the **F** TECH CREDITED drop down box (credit for the customer pay or the non-billable work). Enter the amount of **G** SOLD HOURS and **H** SOLD DOLLARS (non-discounted price) for the new sold work (include parts, labor, tax, everything!). Finally, enter any **I** DECLINED HOURS and **J** DECLINED DOLLAR amount for all estimated work that was presented to the customer but they chose not to have done that same day. Now, click on the SAVE UPSSELL box to confirm upsell. Follow the steps described in 8c to dispatch.

**WorkOrders**

- CATT01 - 2.0 hrs
- cj71 - 0.3 hrs
- matt - 1.0 hrs

**Dispatched WorkOrders**

Sorted By:  New  Old

Active WOs

- spg100 - 3.0 hrs
- 28806 - 4.0 hrs
- cj70 - 1.5 hrs
- cj60 - 5.5 hrs
- cj59 - 0.3 hrs
- cj52 - 2.9 hrs
- cj51 - 1.0 hrs
- larry - 6.0 hrs
- 34257 - 13.0 hrs
- 24854 - 9.0 hrs

Search/New WO:

**[ Create Upsell ]**

W/O #: spg100

Ad Code: Yahoo

Sold By: Luis Salesmore

Category: Customer Pay

Source: None Selected

Brand: None Selected

Tech Credited: Select Tech

Sold Hours:

Sold Dollars:

Declined Hours:

Declined Dollars:

Save Upsell

**History:**

Date	Event
2008-09-12	WO Created
2008-09-12	Initial Sale for 3.0 hrs
2008-09-12	Dispatched 3.0 hrs

**[ Dispatch Work - 0.00 hours available ]**

Work Sold	Hrs.To Goal	% Sold	Proj. Sales
31.9	112.1	76.1	32.6

Goal	Optimal	Declined	Car Count	AVG WO
144.0	140.7	10.0	15	2.1

SOLD 31.9 10.0

OPTIMAL 140.7 GOAL 144.0

**Note:** Work orders that appear in the **A** DISPATCHED WORK ORDERS list box are listed in order by their creation date. The most recently created work orders appear at the top of the box (NEW). To see the oldest created work orders at the top of the box select (OLD).

## Create a New Work Order

- 9) Place your mouse over the **A** DETAIL ICON in the **B** HISTORY BOX to view a **C** detailed information dialogue box for the event of each **D** entry.

The screenshot displays the 'WorkOrders' application interface. On the left, there are lists for 'WorkOrders' and 'Dispatched WorkOrders'. The main area is the 'Create Upsell' form, which includes fields for W/O #, Ad Code, Sold By, Category, Source, Brand, Tech Credited, Sold Hours, Sold Dollars, Declined Hours, and Declined Dollars. A 'History' table is located on the right side of the form, listing events with their dates and descriptions. A 'Service Information' popup is visible, showing details for a specific event. At the bottom, there is a summary table and a bar graph area.

Work Sold	Hrs.To Goal	% Sold	Proj. Sales
31.9	112.1	76.1	32.6

Goal	Optimal	Declined	Car Count	AVG WO
144.0	140.7	10.0	15	2.1

SOLD	10.0
31.9	
OPTIMAL	GOAL
140.7	144.0

- 10) The **E** RETURN TO BAR GRAPH VIEW button at the top center of the page returns you to the Technician bar graph display (See the Service Advisor Personal Page guide for more details on the bar graph view.)

- 11) Repeat Step 7 to create a new work order.

Note: To enter a missed work order for a previous day, in case it was missed in the front-end process by the Service Advisor, simply add it through the Verify module. Only a manager, owner, or accountant has access to the Verify module. Please read the Verify document for more details.