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***PRINT IMMEDIATELY***

## Quick Start for Owners/Managers

VERY IMPORTANT INFORMATION ENCLOSED. PLEASE READ NOW.

**CONGRATULATIONS** and WELCOME to the QuickTrac family. We appreciate that you have taken such a positive step in moving your business forward. We believe QuickTrac will become a valuable tool in creating the success you desire.

**What to expect from QuickTrac -** We want to help you get the most from QuickTrac and your business. Your next step to success is simply to get the program in place and used immediately by everyone. After quickly reviewing the Quick Start Guides yourself, provide the Service Advisors, Service Technicians, and Bookkeeper a copy of the Quick Start Login and their specific Quick Start Guides. This is all they will need to do.

**Quick Start Guides** are listed below and described on the following pages. You can also find these documents and more at www.quicktracsw.com via the Clients link at the top right of the page. You will be asked to provide your shop login and password to gain access.

- QuickTrac Work Order Process Overview
- Initial Shop Set-Up
- Create a QuickTrac Desktop Shortcut
- Quick Start Login
- Quick Start Service Advisor Guide
- Quick Start Technician Guide
- Quick Start Bookkeeper/Manager

Occasionally you will receive a survey from us. Please take a few minutes to complete them. It is very important to us that we are responsive to our clients and that QuickTrac continues to improve. We value your opinions and ideas and hope to put many of them into the program. These surveys also help us gather industry statistics, trends and standards, which we will be including in your quarterly emails.

**Persistence over Resistance! -** Sometimes new QuickTrac clients experience resistance from their staff about entering the needed data; after all they have never had to do this before! This is not unexpected, any change can be difficult. Rest assured that the feedback from users is that it is well worth the effort to make sure this a routine habit for everyone.

Being unsure of exactly how to interface with the program can be stressful, however QuickTrac is extremely simple to use. Just provide the printed instructions that apply to each member of your staff and after the initial learning period they will see how quick and easy it is to enter data. Our clients have found that once the staff understands what they need to do and they do it for a few days, it becomes very routine. Within a few weeks the staff can't live without the real-time data that QuickTrac provides them. When they see how QuickTrac helps them to recognize what needs to be done to achieve their goals there is no stopping them!

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## QuickTrac Work Order Process Overview

Using QuickTrac is simple and easy for each of your employees. We know how valuable your employee's time is so we have made QuickTrac very efficient and user friendly. There are six basic steps to using the application.

1. Create a shortcut on every computer that will use the program.

2. Have the user log into the program via the shortcut and then leave it on the screen for the day in compact (minimize) mode.

3. The Service Advisor takes the Work Order number created by your Point-of-Sale system and enters it into QuickTrac to create the work order. Once the work order is created, it can then be dispatched to a Technician(s). This step takes approximately 5 to 15 seconds to do. This causes the WO in the program to show up on the Technician's Personal Page in their Available Work box (upper left corner).

4. As additional work is sold or presented to the customer, the Service Advisor repeats the above step. If the customer decides not to have some work done, those time and dollar amounts are entered under the Declined Work fields. This takes no more than 10 seconds. **Inputting declined work is critical for accurate reporting of results.**

5. When the Technician(s) completes the job they click on the appropriate work order number on their personal page and enter the amount of hours produced. This can be done when it is completed or when they have done all that they will be doing for the day. If the Technician is totally finished with their part of the job, they should click on the MARK AS COMPLETE box before clicking on the DONE button. This takes the Technician 3-5 seconds to do.

6. To use the Verify module (which we highly recommend to give you access to accurate and complete data in Analytics), the Verifier simply checks that all amounts entered by the Service Advisors and Service Technicians are correct. Then the Verifier enters the final dollar amounts collected from the customer. Verifying each work order requires no more than 10-20 seconds for each work order once you become familiar with the process. It must be done to create accurate data and charts in the Analytics module.

Once your staff is familiar with QuickTrac, each total work order processing time should be less than 1 minute to be entered and verified! If you had ten work orders a day that would mean that your staff would only spend a total of 10 minutes a day spread out between all of them and it gives everyone the indicators of success they really want.

**Note**: All documents explaining what you see in QuickTrac and how to use QuickTrac can also be accessed through the Clients link at the top of the page at www.quicktracsw.com. You will need to enter your Shop's Login and Password. Once logged in you will see all documents on the right hand side. They are filled with pointers on how to use QuickTrac to gain better control of your business, monitor daily operations, pinpoint and fix problems, set and reach goals, and become a more effective business person.

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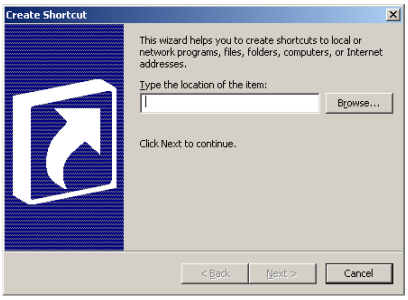
## Create a QuickTrac Shortcut

Create a QuickTrac Shortcut using Internet Explorer

1. Go to http://www.quicktracsw.com/shortcut.html
2. You should see the QuickTrac icon as shown below. Right click on the QuickTrac icon and choose SAVE TARGET AS. You can then see the shortcut on your desktop.

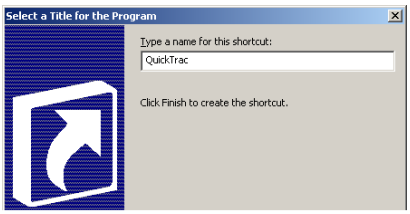
Create a QuickTrac Shortcut using Mozilla Firefox

1. Right click on your desktop
2. Select NEW > SHORTCUT
3. Type the location: https://www.quicktracsw.com/quicktrac/
4. Click on the next button.




5. Type in the name for the shortcut: QUICKTRAC

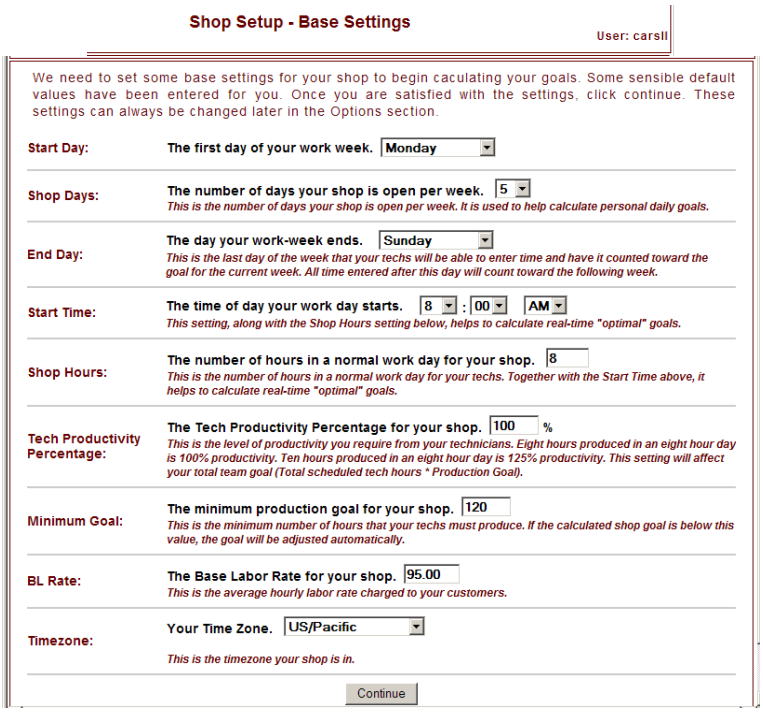
6. Click on the finish button



## Initial Shop Setup

After completing registration and payment you will be directed to go to www.quicktracsw.com to start using the program. Click on the LOGIN link at the top of QuickTrac's website and you will be asked to enter your SHOP'S LOGIN and PASSWORD that you created. These passwords were also sent to your email address for reference. You will then be asked to enter your ADMIN (owner) LOGIN and PASSWORD. You will only see the following steps during your initial shop's setup. However, changes to your shop's setup can easily be made later through OPTIONS.

Below is the **Shop Setup – Base Settings** screen that you will see after you enter your ADMIN (Owner) LOGIN and PASSWORD. Before using the program the first time it will be necessary for the Owner/Manager to do this initial Shop Setup. The Shop Setup – Base Settings allow you to customize your shop's days, times, and hours. This should only take about 10-20 minutes. Setting up your shop and goals accurately will allow you to monitor daily and weekly results in Real Time. In addition, it will help you predict and manage future results.




The first setting is the START DAY setting. This setting is where you assign the first day of your work week by selecting it from the START DAY drop down box. This determines the starting point of the program each week.

The second setting is the SHOP DAYS setting. This setting is where you assign the number of days that your shop is open for business per week. The SHOP DAYS setting is used to help calculate PERSONAL DAILY GOALS.

The third setting is the END DAY setting. This setting is the day your work week ends. It is the last day of the week that your Technicians will be able to enter time and have it counted toward the goal for the current work week. Any time entered after this day will count toward the following work week. For example, you can have a START DAY set to Monday; SHOP DAYS set to 5, and have an END DAY of Saturday. In other words, your shop can be a Monday through Friday shop but if time is entered on a Saturday then that time is credited on that for the current work week. This allows for jobs finished after the normal work week to be included for payroll purposes if desired.

The fourth setting is the START TIME setting. This setting is the time of day that your work day starts. This setting, as well as the SHOP HOURS setting, helps to calculate real-time "OPTIMAL" goals.

The fifth setting is the SHOP HOURS setting. This setting is the number of hours your shop is usually open for business. This setting, as well as the START TIME setting, helps to calculate real-time "OPTIMAL" goals.

The sixth setting, the TECH PRODUCTIVITY PERCENTAGE, is the setting that indicates the level of productivity you require from your technicians as a percentage. Eight hours produced in an eight hour day is 100% productivity. Ten hours produced in an eight hour day is 125% productivity (10 hrs ÷ 8 hour day = 1.25 or 125%). This number will be used to control the colors of the graphs – Red, Green, and Yellow and to set your TEAM GOAL.

**Note:** The TECH PRODUCTIVITY PERCENTAGE will affect your total team goal (Total Scheduled Tech hours **X** the Tech Productivity Percentage = Calculated Team Goal). The Technicians scheduled hours are set under SCHEDULING. See the SCHEDULING user document for more details.

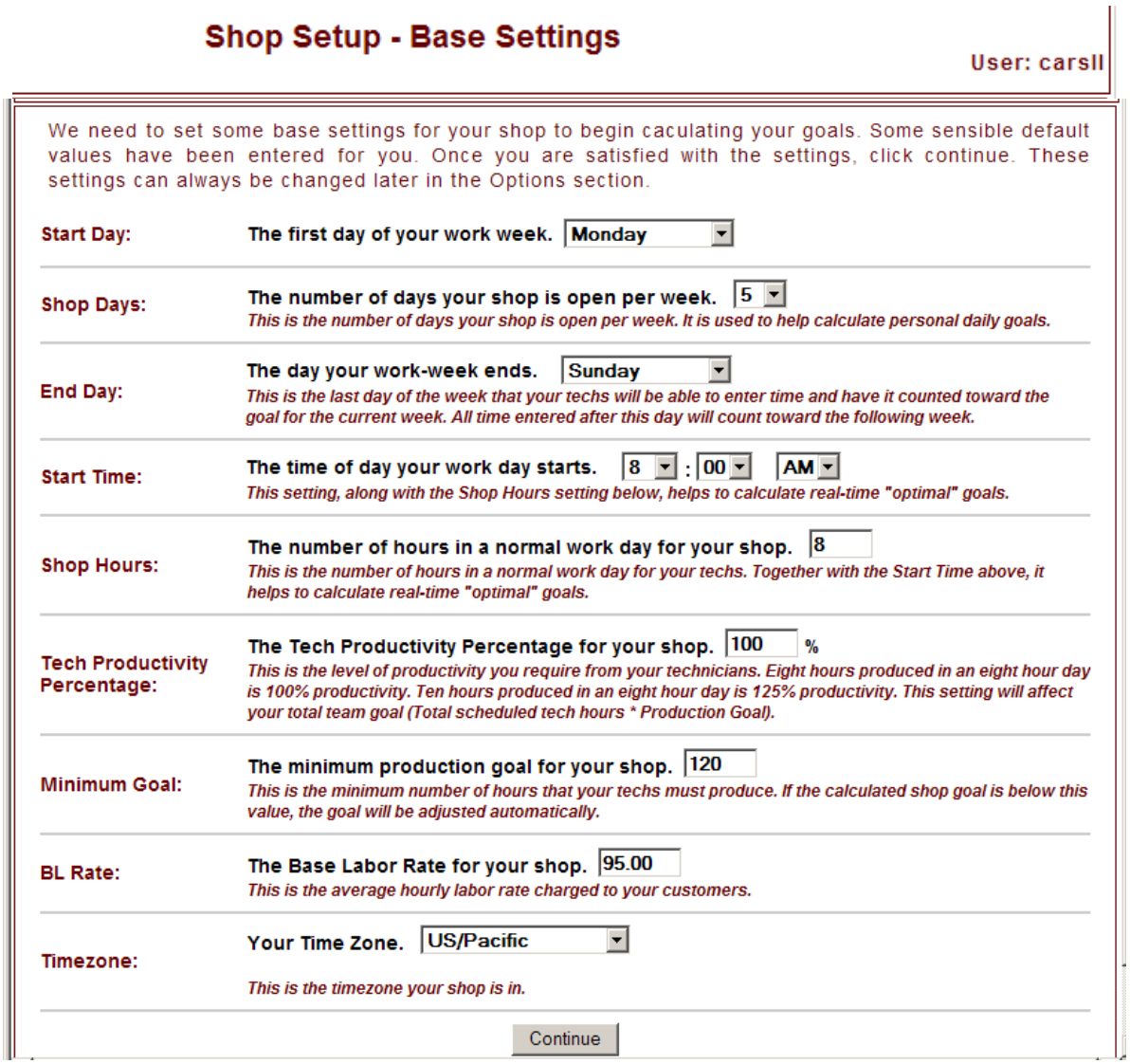
The seventh setting, the MINIMUM GOAL, is the minimum number of hours that your **Technician Team must produce** in a week. The CALCULATED TEAM GOAL will not be allowed to fall below the MINIMUM GOAL.

The eighth setting is the BASE LABOR RATE. The BL RATE is the average hourly labor rate that is charged to your customers. This number will be used for comparisons in the reporting section.

And the ninth setting, the TIME ZONE, provides you with a dropdown box to select your time zone.

Click the CONTINUE button to confirm and to continue setting up your shop.

**Note:** Any other settings seen below are options and are not described here because they have been set with the default suggested settings by QuickTrac. If you would like to change these settings, you can via the Options > Shop menu in QuickTrac. We suggest that you work with the default settings in the beginning.



## Initial Shop Setup

The next screen you will see is the **Shop Setup – Add Users** screen. You need to add a minimum of one Service Advisor and one Service Technician. We recommend creating all users at this point. However, additional users can be created later in the Options section.

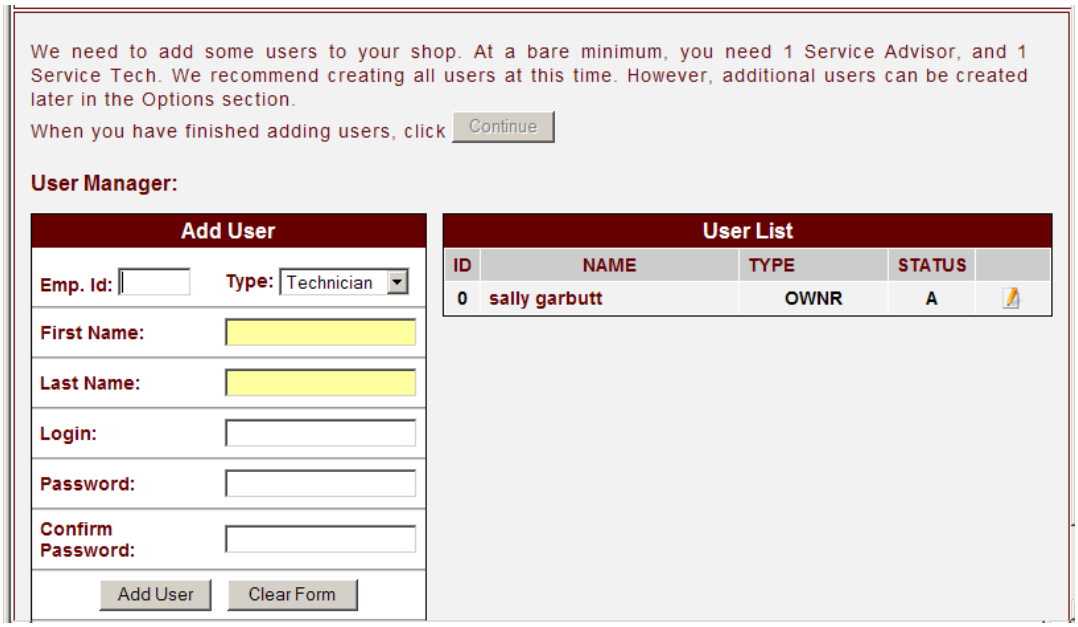
**Note:** The CONTINUE button will be grayed out until the minimum of one Service Advisor and one Service Technician are created.

To add a user, first enter the EMPLOYEE ID. This can be a number up to nine numerical digits (no alpha characters). Tab over and select the employee role TYPE from the drop down box. Tab over again and enter the FIRST NAME and then LAST NAME. Next, select a LOGIN and PASSWORD for the employee to use when logging in to their personal account. Keep these very simple and easy. **All employees require a personal login and password except Technicians**.

Lastly, click on the ADD USER button to add that employee to your shop's user list. The CLEAR FORM button clears all data from the form.

**Note:** Each job title is restricted to areas and information that is important to their position. The Owner is the only one allowed unrestricted access. To be able to perform tasks both as an Owner and Service Advisor, create a user account for each position but use a different login for each account. Keep them simple and easy.

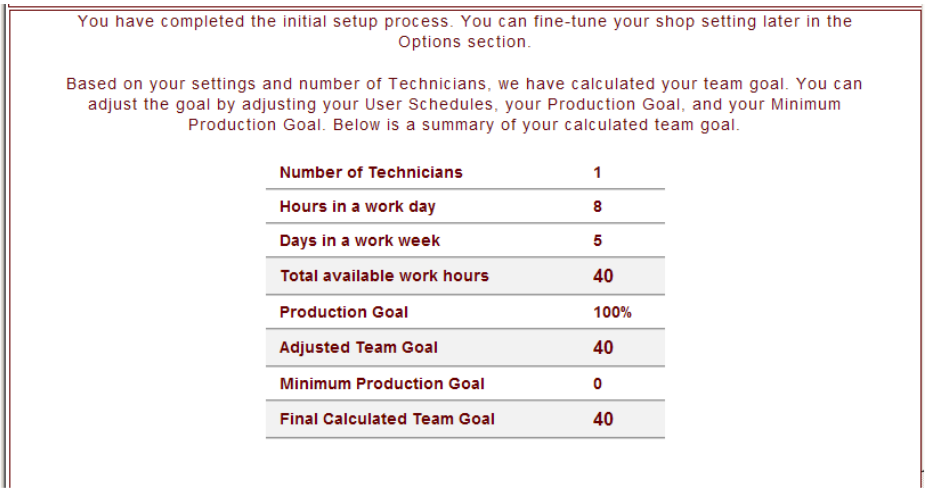
QuickTrac supports a maximum of 100 Service Technicians and 25 Service Advisors.




Click on the CONTINUE button when you are finished adding users.

## Initial Shop Setup

The next page you see when you are finished adding users is your **Shop Setup – Summary**. This is simply a summary of the settings you already entered. Click on the continue button at the bottom of the page after reviewing.

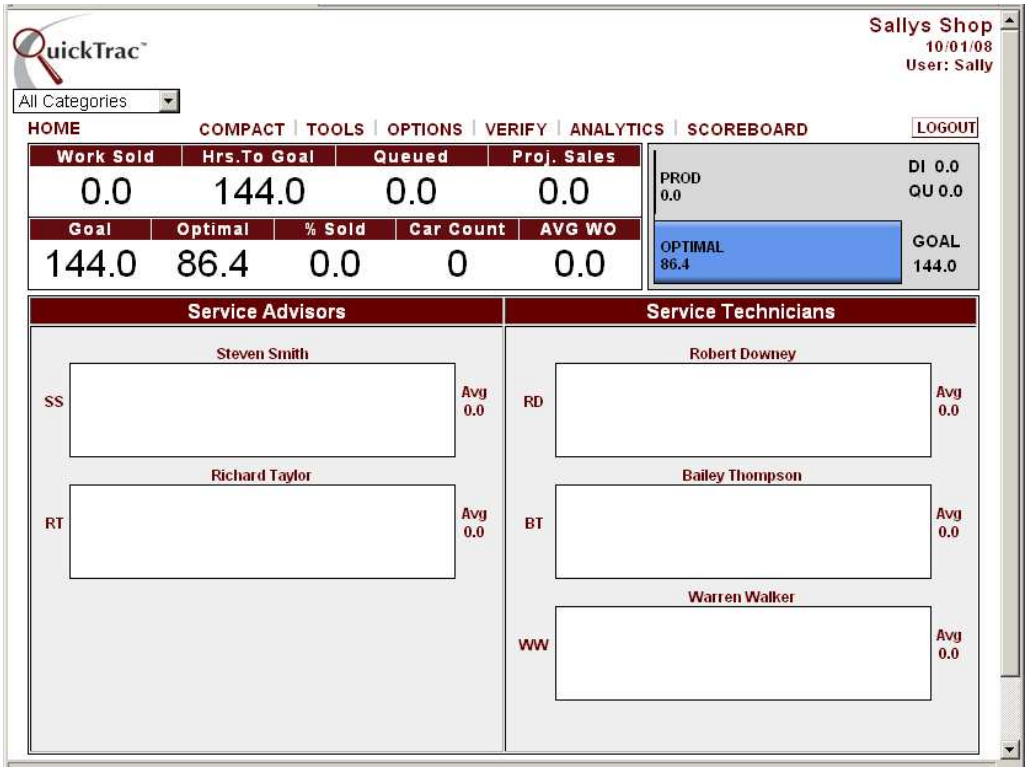


You have completed the initial setup process. You can fine-tune your shop setting later in the Options section.

Based on your settings and number of Technicians, we have calculated your team goal. You can adjust the goal by adjusting your User Schedules, your Production Goal, and your Minimum Production Goal. Below is a summary of your calculated team goal.

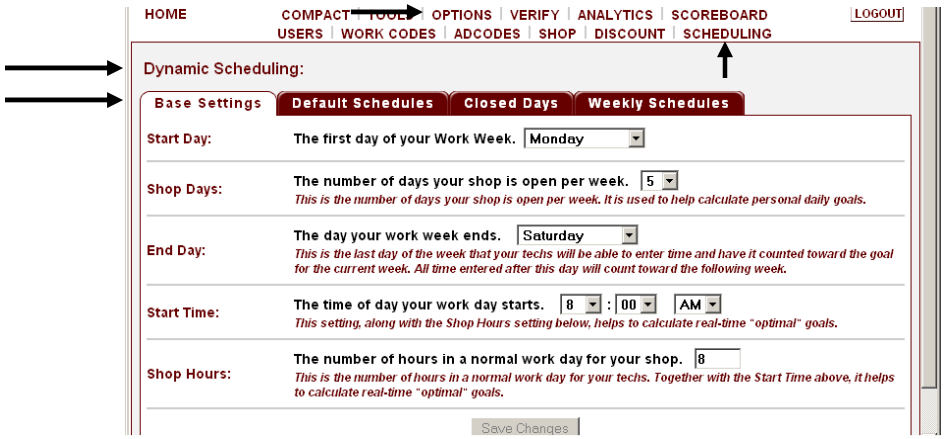
| | |
|---|---|
| Number of Technicians | 1 |
| Hours in a work day | 8 |
| Days in a work week | 5 |
| Total available work hours | 40 |
| Production Goal | 100% |
| Adjusted Team Goal | 40 |
| Minimum Production Goal | 0 |
| Final Calculated Team Goal | 40 |

Review your summary and then click on THE CONTINUE TO QUICKTRAC button to see your Service Advisor Main Screen appear. Changes to shop settings can easily be made through the OPTIONS > SHOP menu later if needed.



## Scheduling

Now go into OPTIONS > SCHEDULING to set up your employees schedules. DYNAMIC SCHEDULING allows you to customize your employee's, shop's days, times, and hours. You can define the days and hours that each of your employees work in a standard business week, schedule any days or part of a day the shop will be closed, and modify employees daily schedules which may include leave, vacations, sick days, etc.




The first tab is the BASE SETTINGS tab. The base settings were entered during your initial set up described on page 3 and 4. You can modify any settings here if needed.

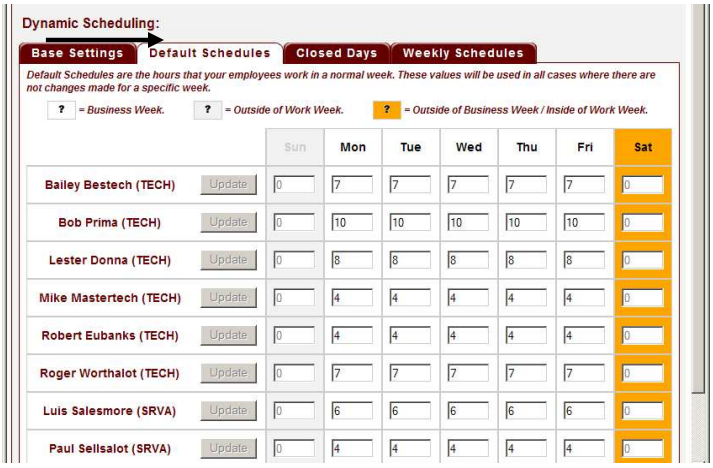
The second tab is the DEFAULT SCHEDULES tab. This tab is where you define the days and hours that each of your employee's work in a standard / normal work week. These values will be used unless there are changes made for a specific week under CLOSED DAYS or WEEKLY SCHEDULES.

The columns with a white background are days which fall within the shop's business week.

The columns with a grey background are days which are outside of the shop's business week and the shop's work week. Any time entered within a grey column day will be credited to the following week's goal.

The columns with an orange background are days which are outside of the shop's business days but fall within work week. Any time entered within an orange column day will be credited to the current work week's goal.

After editing an employee's default work week, click on the UPDATE button to confirm. To confirm more than one employee's default schedule, click on the SAVE CHANGES button at the bottom of page.



## Scheduling

The third tab is the CLOSED DAYS tab. This tab is where you schedule any CLOSED DAYS for all or part of the day. Any company holiday scheduled should also be entered here. CLOSED DAYS can only be scheduled for the current and the following three weeks. Check the date shown to be sure entries are for the correct week.

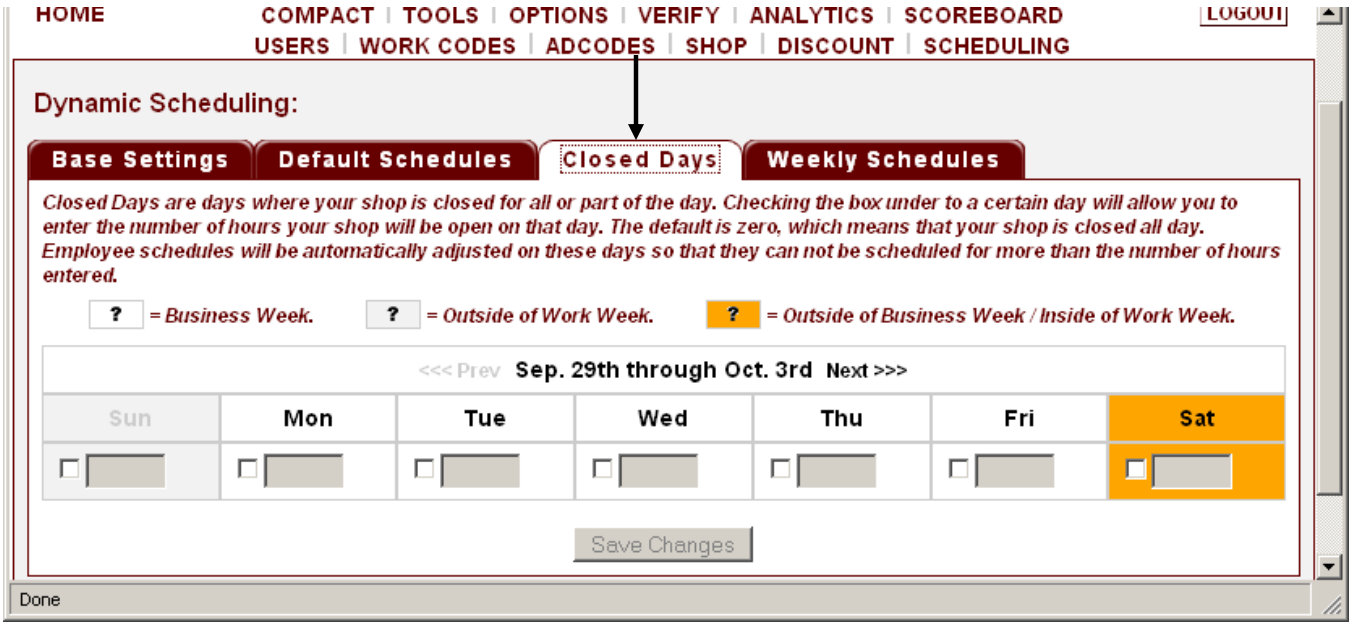
Check the SMALL BOX to the left of the WORK DAY that will be closed all or part of the day. Then tab over or click in the LARGE BOX and enter the number of hours your shop will be OPEN on that day. Once check marked, the default number assigned is zero, which means that your shop is closed all day. Employee schedules will be automatically adjusted on these days so that they can not be scheduled for more than the number of hours entered.

The columns with a white background are days which fall within the shop's business week.

The columns with a grey background are days which are outside of the shop's business week and the shop's work week. Any time entered within a grey column day will be assigned to the following week's CLOSED DAY schedule.

The columns with an orange background are days which are outside of the shop's business week but fall within the current work week. Any time entered within an orange column day will be assigned to the current business week CLOSED DAYS.

After scheduling any CLOSED DAYS click on the SAVE CHANGES button at the bottom of the page to confirm your shop's CLOSED DAY schedule.



## Scheduling

The last tab is the WEEKLY SCHEDULES tab. This tab allows you to modify employee's daily schedules which may include leave, vacations, sick days, etc. You can specify what an employee's schedule will be for a specific week and are able to set schedules for the current and up to three weeks in the future. Check the date shown to be sure your entries are for the current time period. The default schedules are pre-filled for your convenience. If there is a CLOSED-DAY scheduled, you cannot enter more hours for that day than was scheduled for the CLOSED-DAY.

The columns with a white background are days which fall within the shop business week.

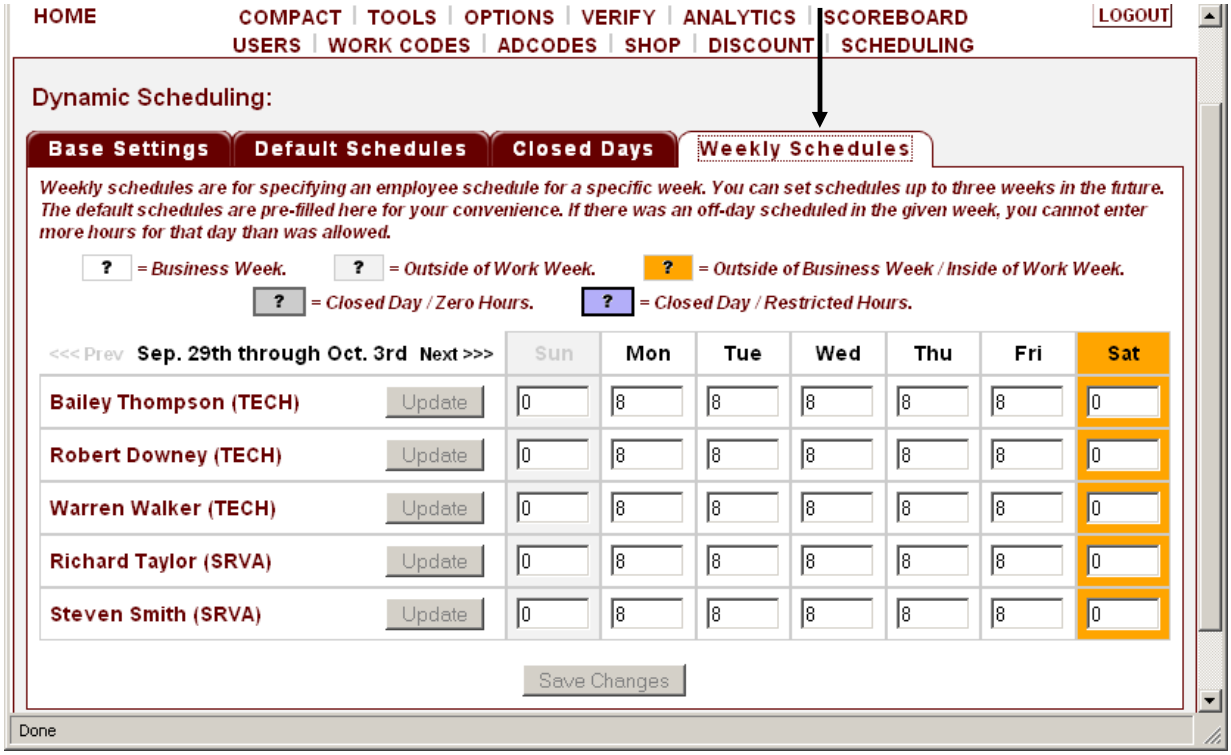
The columns with a light grey background are days which are outside of the shop business week and work week. Any time entered within a light grey column day will be assigned to the following work week schedule.

The columns with an orange background are days which are outside of the shop's business week but fall within the current work week. Any time entered within an orange column day will be assigned to the current work week goals.

Fields with a dark grey background are zero-hour closed days and cannot be changed. In other words, the shop is closed and no hours can be produced that day.

Fields with a purple background are restricted hour closed days. The values are pre-set to be no more than the allowed number for that day. You cannot set these fields to more than the allowed value for that day. In other words, the shop is only open for the assigned hours (set in CLOSED DAYS) and no more than those hours can be produced for that day. However, scheduling fewer hours for these fields, if needed, is allowed.

After modifying an employee's temporary weekly schedule, click on the SAVE CHANGES button at the bottom of the page to confirm.



## Ad Codes

We recommend that you create separate AD CODES for each category that brings customers to your business, the more specific you can be, the better the data, and the more useful the reports. We suggest that every Work Order show an accurate AD CODE for that customer. A very simple way to determine what AD CODE applies is to simply ask how they heard about your company. By asking this one simple question very valuable information will be gained in a short time. Remember - **Every W.O. must show an Ad source for reporting to occur**!

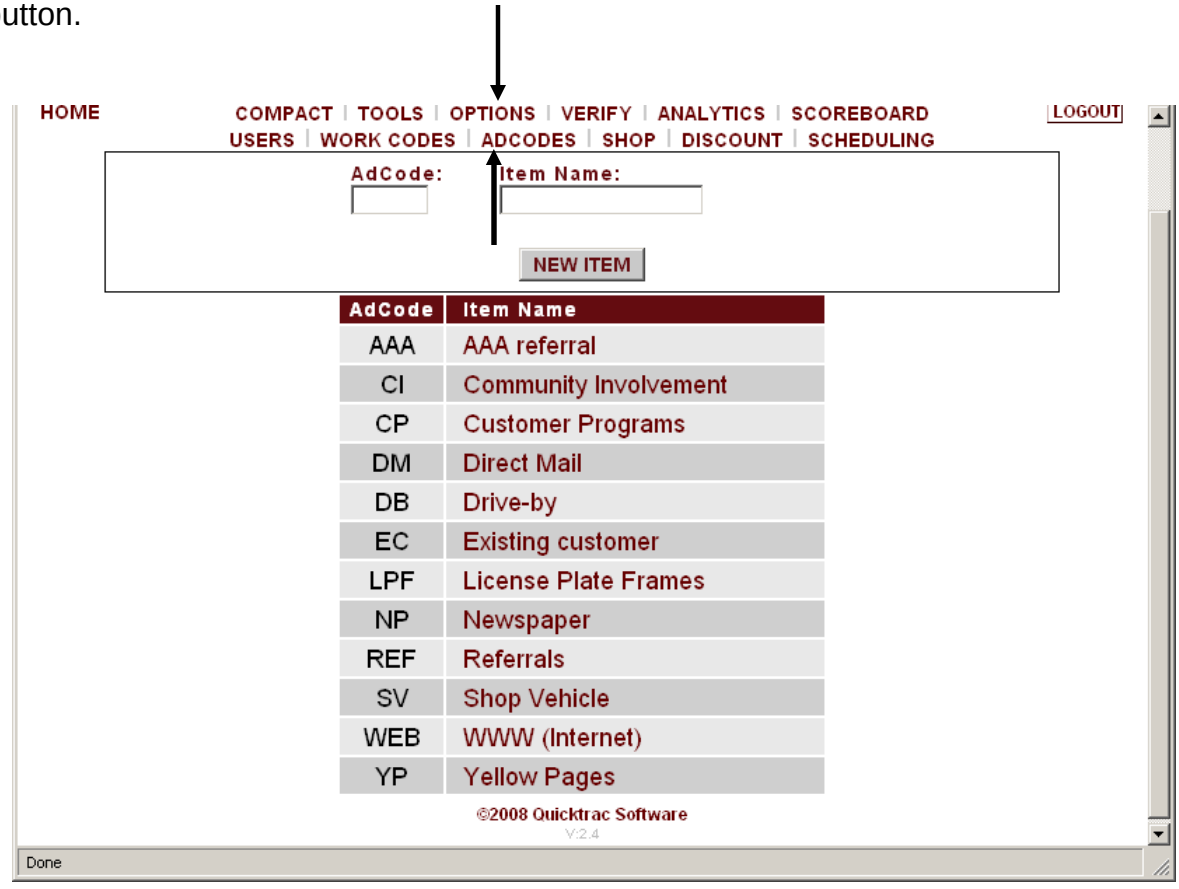
Having accurate information on AD CODES will allow you to determine whether your current time/money put into advertising is well spent and how you might want to spend your advertising dollars in the future to get even better results.

We have included AD CODE defaults in the program and are meant as samples only. You can add to or change them under the OPTIONS menu.

To create an AD CODE, you must be logged in as an Owner or Manager. First, click on the AD CODES link under the OPTIONS menu. Second, enter the new AD CODE in the CODE box and then tab over and enter the item name in the ITEM NAME box. Third, click on the NEW ITEM button.

To delete an ad code, click on the Code Name under the item name column. Then, click on the delete button.

To update an ad code, click on the CODE NAME under the ITEM NAME column. Then, click on the UPDATE button.



**Work-Codes Codes**

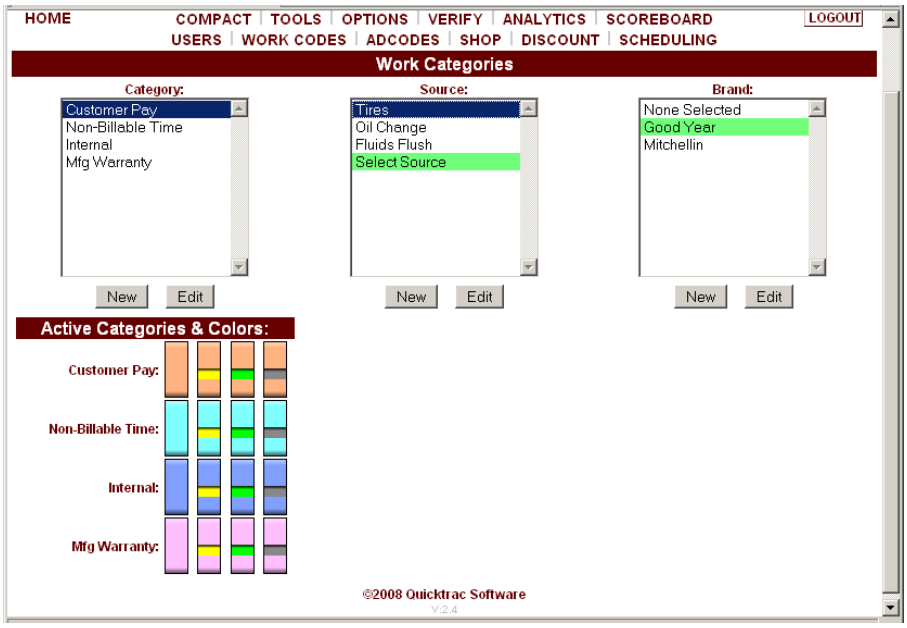
WORK CODES are accessed under the OPTIONS menu. Work Categories are defined as tracking categories from which work originates and against which, work is produced. Work Categories are assigned when work is sold and is used to track the productivity for each category over time. There can be a maximum of twelve work CATEGORIES. The program allows up to two additional levels of sub-categories (SOURCE and BRAND) beneath the Category root level which are virtually unlimited in number. For example, in the **Category** "Customer Pay", you may wish to add a **Source** of "Tire" with the **Brand** as "Goodyear" and "Michelin.

The first level of default work codes is represented by the CATEGORY. New shops are given four base categories (*two of these categories are set to active for dealerships and inactive for independent shops.) Independent shops can activate these categories as necessary. An Inactive Category is displayed with a gray background. The following parent categories have the following default color assignments.

**Customer Pay** (Pastel Orange) – Active for individual shops & dealerships. Customer Pay is Work that will be paid for by the customer when work is completed. Create any Sources and/or Brands that may fall under Customer Pay so that your sales team can start creating work orders for this category.

**Non-Billable** (Teal) - Active for individual shops & dealerships. Non-Billable time is work that is performed but no money is collected from the customer. Any work performed that you pay your staff for that cannot be billed to the customer must show up in the program as non-billable time in order to quickly identify lost sources of revenue and expense trends. This is an important area for creating profitability that is often overlooked in businesses. Create any Sources and/or Brands that may fall under Non-Billable time to that your sales team can start creating work orders and assign them as non-billable as necessary.

***Internal** (Blue) – Active for dealerships
***Mfg Warranty** (Purple) – Active for dealerships




Complete details on Work Codes can be found on the Work Codes documentation.

***Important Please Read Twice***

Please make sure that your staff is familiar with how to add or finish a Work Order in QuickTrac.

**It is very important that each and every work order be entered when it is taken in and entered as soon it is done, and <u>that the staff does the data entry!</u> As a Manager/Owner it is just as important to Verify a work order as soon as possible (day work order is completed or the next day) to ensure accurate data and reports.**

Part of the reason QuickTrac works so well is that it applies the principles of Scorekeeping. For Scorekeeping to work properly individuals must see that the input they make immediately affects their score.

When individuals are given the opportunity to keep score, given the tools, and the knowledge of what is expected of them, they will perform. This is one of the benefits of QuickTrac. Your employees will be able to see where they stand and what they need to do to increase their score. This alone has been shown to have a positive effect on productivity!

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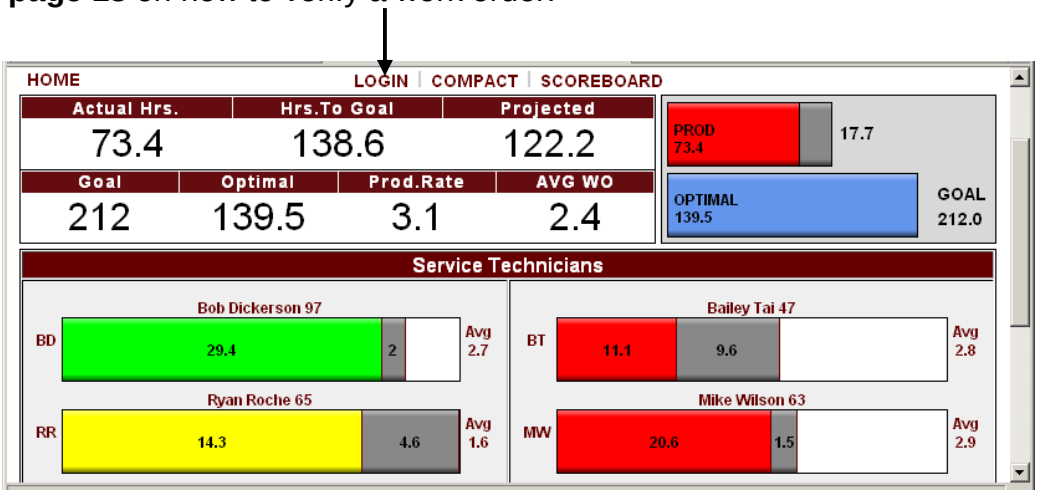
# Quick Start Log In

## How to Log into QuickTrac

1. Click on the QT icon on your desktop If you do not see a QT icon on your desktop, follow the steps on Creating a Shortcut described on page three.
2. In the dialog box that appears type in your Shop's Username and Password. Refer back to your "Welcome to QuickTrac" email message which provides your Shop Login and Password. After entering your shop login you will be taken to the Technician's Main Page. Technicians will follow the steps on page 17 on how to enter time produced, how to complete a work order, and how to understand their personal page.

3. To log on as an Owner, Manager, Service Advisor, or Accountant, click on the **Login** link (top left on Technician Main Page menu) and type your personal username and password into the dialog box that appears. An Owner can refer to the "Welcome to QuickTrac" email message which provides the Owner Login and Password. Users will need to have Owner or Manager reset any forgotten passwords in the OPTIONS menu. **Service Advisors, refer to page 16** on how to create, dispatch, and upsell a work order. **Service Technicians, refer to page 17** on how to enter time produced and close a work order. **Owner, Manager, and Accountant, refer to page 18** on how to verify a work order.



# QUICK START GUIDE FOR SERVICE ADVISOR
## How to create, dispatch and upsell a work order

Complete info in the *How to Create a Work Order* document via the Clients link at www.quicktracsw.com

**Note: Immediately** upon **creating** a Work Order (vehicle has a POS WO and waiting to be dispatched) or **completing** a new sale, it is important that it is entered into QuickTrac! (This allows real time viewing of the Work Orders you have processed)

1. From the **Service Advisor Main Page** click on your Service Advisor bar graph.
2. To create a ***New WO*** entry, enter the order number from your point of sale on the left hand side in the **SEARCH/NEW WO** box. This will create a data entry location in the center box on the page.
3. Select the appropriate **AD CODE** for your WO by selecting it from the **AD CODE** drop down box. You must enter an ad code to continue or the entries will not be accepted. (see Manager to add **AD CODES**)
4. Select the **SOLD BY** name to select who sold this work order so that they can get credit for that sale
5. Select the appropriate **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, Source, and Brand.)
6. Select technician from the "**Tech Credited**" drop down box when an upsell is made to credit a technician with finding work (when applicable – selecting a tech is not mandatory). When the customer is using a non-billable category, select "Tech Credited" to indicate which technician was responsible for the non-billable work.
7. Enter the estimated initial total hours in the **SOLD HOURS** box.
8. Enter the estimated total non-discounted dollars sold in the **SOLD DOLLARS** box (includes part, labor, tax, everything!).
9. Hit the **ENTER** button on your keyboard to confirm entries. This new entry will now appear in the upper left box marked **WorkOrders** which contains all WO's that have hours left to be dispatched.
10. When you are ready to ***dispatch*** the WO to a technician click on the collapsible **DISPATCH WORK GREEN BAR** (if it isn't already collapsed) and select a technician from the **SERVICE TECHNICIAN** drop down box. Tab over and enter the dispatch work **HOURS** for this technician. The WO will now appear in the **ACTIVE WO'S** box on the left hand side and on the technician's personal page as a dispatched job.
11. To enter ***additional sold work*** after the Technician inspects the vehicle select the correct WO from either the **WORK ORDERS** box or by typing it in the **SEARCH/NEW WO** box on the left hand bottom of the page. Enter the amount of **HOURS** and **DOLLARS** *only for the additional* sold work and then enter the **DECLINED WORK HOURS** and **DOLLARS** amount for all estimated work that was presented to the customer but they chose not to have done. Click on the **ENTER** button on your keyboard to save entries. The WO will appear in the **Work Orders** box for dispatching.
12. Dispatch the new work hours as explained in Step 10.

**Note:** If you have both CUSTOMER PAY and NON-BILLABLE time to dispatch, create each entry separately on the same work order.

# QUICK START GUIDE FOR SERVICE TECHNICIAN
## How to Enter and Complete a Work Order

Complete info in the *Entering and Completing a Work Order* document via the Clients link at www.quicktracsw.com

**Note:** It is important that **immediately** after completing a job you enter it into the QuickTrac system to allow real time viewing of your numbers.

1. Once logged into ***Technician Main page***, click on your technician bar graph. You will be taken to your ***Personal Technician page***.
2. Click on the Work Order Number from the **AVAILABLE WORK** box on the upper left hand side which displays Work Orders which you have been assigned. That WO will disappear from the Available Work box when all hours are completed.
3. If you have not completed a WO but want to update the system to show what you have completed up to this point, click on the Work Order Number and enter your hours produced in the **HOURS PRODUCED** box in the center of the page, then click on the **DONE** button. Do not click the **MARK AS COMPLETE** checkbox since you still have work remaining to complete. The WO order will return to the **AVAILABLE WORK** box with the remaining hours adjusted by what you have already completed.
4. When you have completed **ALL** of the work assigned to you and the time shown in the **WORK PRODUCED** box is correct, click on the **MARK AS COMPLETE** checkbox, then click on the **DONE** button.
5. Click on the Home menu to return to the ***Technician Main page.***

**What you see on the rest of the page: On the right panel -**The ***WORK WEEK HISTORY*** box on the right side of the page has a horizontal column for each day and the daily goal hours remaining to be done on that day will display in the center of the bar. A colored bar will appear as you enter completed work. A red bar graph means that 60% or less of your daily goal has been met. A yellow bar graph means that 60% to 80% of your daily goal has been met. A green bar graph means 80% to 100% of your daily goal has been met. And, work produced above 100% of your daily goal will be dark green.

The **bottom of the page** contains the weekly totals both numerically (on the left) and graphically (on the right). Your goal for the week is displayed in the second box on the bottom and in the far right corner. Actual hours completed will appear in the first box and in the bar graph on the top right, using the same color system as above. The light green area of the PROD bar graph is work already assigned but not yet completed and is shown by the number to the right of the bar. Optimal is displayed in the fifth box numerically and as a blue bar graph on the right. Optimal is where you need to be at this time in the work week in order to hit your goal by the end of the day on the last work day. Average Work Order (AVG/WO) is the average of all WO's you have completed to this time.

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# QUICK START VERIFY FOR BOOKKEEPER/MANAGER

## How to verify a work order

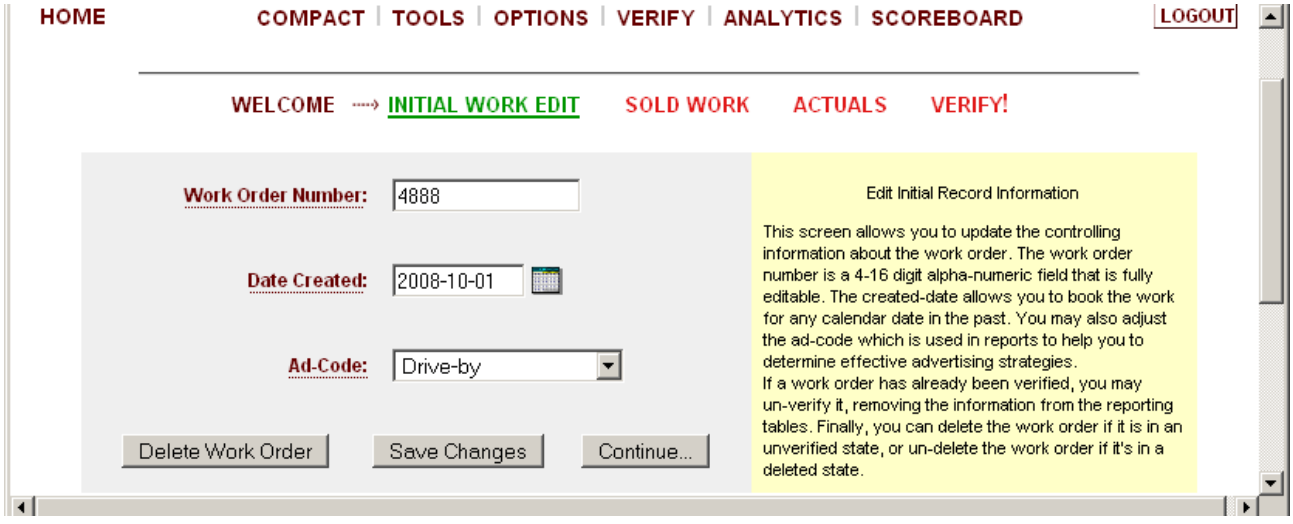
Complete info in the *Verify* document via the Clients link at www.quicktracsw.com

Once a work order has been paid for by the customer you will need to verify the work order. This process finalizes information for Analytics and compares the Service Advisor inputs and Technician production values against the actual numbers on the final Work Order. **It is recommended that you verify all paid work orders the next business day.**

1. Log into the program per Quick Start Log In Process.
2. Click on ***Verify*** on the top right of the menu.
3. Type the WO number you wish to verify, this will bring up the WO number. Confirm that all is correct in the **Initial Work Edit** screen or modify as necessary and click on the continue button.
4. Confirm that all of the sold work entered by your front end staff is correct in the **Sold Work Screen**. Each event will show the SALES, the DISPATCH data, and the PRODUCED data. All data can be edited as necessary.
5. After confirming sold work move on to the ***Actuals*** tab to enter the actual dollars collected on the final work order. First, select the **Closing Date** which is when the Work Order was paid for by the customer. Use the calendar icon to select the date. Under the closing date you will enter the amounts collected on labor, parts, sublet, other, tax, and discounts. Click on the "**Continue**" button, and then click on the "**Verify Work Order**" button. Once a work order is verified, it will be included in Analytics.
6. Repeat the above steps for each Work Order.

A missed work order can be created in the welcome screen. Simply enter the new (missed) work order number and click on the BEGIN button or press the enter button on your keyboard.

A dialogue box will appear informing you that a new work order will be created and to either cancel or confirm the request.



## Practice Walk-Through Page

1) Click on QuickTrac shortcut on your desktop and sign into your shop's account with your Shop Login and Password. You will be taken to the Technician's Main Page. Now, LOGIN (use menu at top) to the Service Advisor's Main Page with the Service Advisor Login and Password.

2) Now that you are in as a Service Advisor you can create a new work order. Click on a Service Advisor bar graph to go to the Service Advisor Personal Page. On the left hand side, in the third box that says "SEARCH/NEW WO". Create a test work order ("test" or "123" or any number) and then hit the ENTER key on your keyboard.

3) In the center area, at the top, you will see the test work order number you just entered. Below it is the AD CODE drop down box. Click on the AD CODe drop down box and select an ad code. You must select an ad code or you will not be able to create the work order.

4) Select the SOLD BY name to select who sold this work order so that they can get credit for that sale.

5) Select the appropriate 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.)

6) Specify which technician should receive credit for the work being recorded in the TECH CREDITED drop down box (credit for the customer pay or the non-billable work).

7) Enter the HOURS initially sold to the customer, and then tab over and enter the DOLLARS initially sold to the customer (labor, parts, tax, etc). Then, click on the Create WO button.
The work order is now waiting to be dispatched and has been placed on the left hand side, in the top WORK ORDERS box.

8) To dispatch that work order, first click on the test work order number from the WORK ORDERS box to open it. Second, click on the maroon collapsible DISPATCH WORK BAR and then select a technician from the SERVICE TECHNICIAN drop down box. Enter the dispatch work HOURS the technician will be spending on this work order. Click on the 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.

9) After the Technician thoroughly looks the vehicle over for any more work that may be needed he will present that to the Service Advisor. The Service Advisor will now present any additional work needed to the customer. Any additional sold work and any declined work must be entered on the same work order number. Simply click on the work order number from the Active WO box on the left hand side to open it. Enter any additional sold work under the SOLD WORK area. Enter any declined work under the DECLINED WORK area and then click on the SAVE UPSELL button. Dispatch any additional sold hours to Technician(s).

10) Now LOGOUT (top button at the right) to be walked through the Technician's steps. You will be taken back to the Technician's Main Page. Click on the Technician bar graph that you dispatched work to.

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## Practice Walk-Through Page
## (continued)

11) Click on the Work Order Number from the Available Work box on the upper left hand side which displays Work Orders assigned to that Technician. That WO will disappear from the Available Work box when all hours are produced and marked as completed.

12) If you want to update the system to show what you have produced up to this point but have **NOT** completed a WO, enter your hours produced in the **HOURS PRODUCED** box in the center of the page, then click on the DONE button. Do not click the **MARK AS COMPLETE** checkbox since you still have work remaining to complete. The WO order will return to the Available Work Box with the remaining hours adjusted by what you have already completed.

13) When you have completed all work assigned to you and the time shown in the **WORK PRODUCED BOX** is correct, click on the **MARK AS COMPLETE** checkbox, then click on the SAVE button. Or simply click in the **CHECK ALL** checkbox and click on the **DONE** button.

You have just learned how to create a work order as a Service Advisor and how to enter produced time and complete a work order as a Technician. The last step is for the bookkeeper to VERIFY the work order. Follow the steps on page 18 for the verification process. Delete the test work order through the **VERIFY** module when done.

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