



Manual

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Welcome

CONGRATULATIONS and **WELCOME** to QuickTrac, the #1 Automotive Business Improvement Tool. 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. This manual is filled with ways 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 businessperson.

The Automotive Industry today is presented with challenging opportunities which calls for greater resource tools to monitor their business. QuickTrac makes responding to these challenges easier by providing a state of the art, micro-to-macro view, on how their business is performing. It provides customized settings for every shop since every shop is unique and it is tailored for each technician. In addition, it is a tool that helps predict and manage future results.

Accurate and current information assists users and their coaches in making important management decisions in a timely fashion and implement corrective actions while there is still time to positively affect the bottom line. Team members know exactly where they stand in relation to their goals, as well as where the team is headed. QuickTrac tracks production and efficiency, sales ratios, dispatching, warranty issues, and the effectiveness of advertising expenditures in real-time. Information is displayed on a top level dashboard as well as in detailed intuitive graphical reports.

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. Please send an email to sales@quicktracsw.com with any comments and suggestions.

The documents explaining what you see in QuickTrac can 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 to gain access. Once logged in you will see the documents you will need to get you started on the right hand side.

Getting Started

QuickTrac is a hosted web-based subscription service offered exclusively over the web. Your company will be provided a master access login name and password. The primary user can set access privileges for other users in the company, based on their roles in the business. There is no limitation on how many users from the same shop can log on concurrently. There is no software to install or maintain at the user site. Use requires a computer, a permanent Internet connection, and an Internet Browser. QuickTrac works well on most Internet browsers. We recommend IE 6+. If you use a tabbed browser, such as Firefox or Internet Explorer 7, we recommend that you run QuickTrac in its own window with no other tabs open in that window. Some features of the program may not work as designed with more than one tab open.

Pop-Up Blockers and QuickTrac

Certain Features of QuickTrac open in a new window or “Pop-Up” window. In some cases you may find that these features do not work. This is almost always due to a pop-up blocker of some sort installed in your browser.

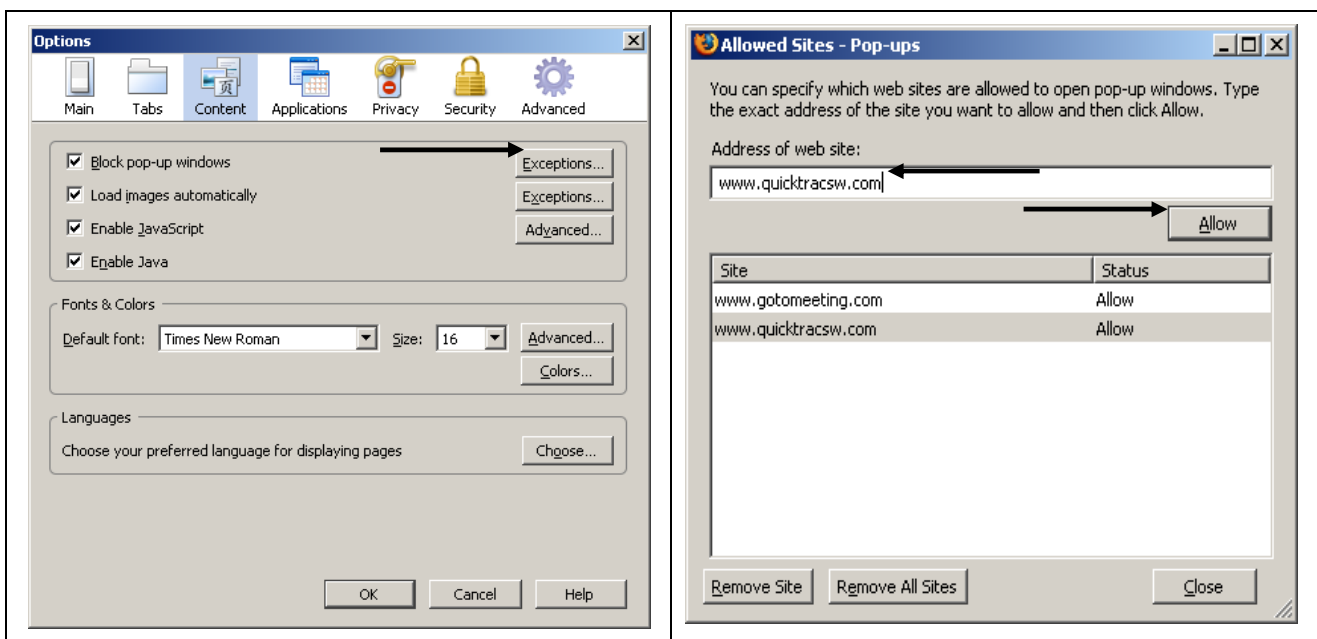
Firefox and newer versions of Internet Explorer on Windows XP also have a built in popup-blocker. This document will outline the steps to take to allow pop-ups from www.quicktracsw.com in Firefox and Internet Explorer. Instructions for disabling other pop-up blockers such as the Yahoo Toolbar and Google Toolbar are detailed in the documentation of those applications, and will not be provided in this document.

The online documentation for the Google Toolbar pop-up blocker can be found at:
<http://www.google.com/support/toolbar/bin/topic.py?topic=116>

The online documentation for the Yahoo Toolbar pop-up blocker can be found at:
<http://help.yahoo.com/help/toolbar/pub/>

Allowing Pop-Ups from www.quicktracsw.com in Firefox

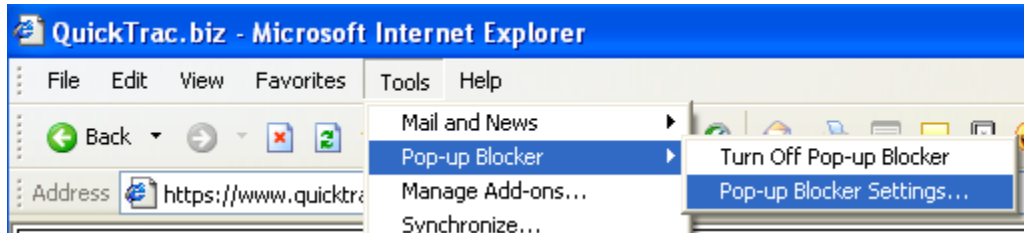
By default, Firefox blocks pop-up windows on web sites. Un-checking this option will disable pop-up blocking. Some sites make legitimate use of pop-up windows such as QuickTrac. Therefore, the pop-up blocking feature has a simple whitelist mechanism to allow certain sites to open pop-ups anyway. To add a site to the whitelist from within Firefox, select TOOLS > OPTIONS > CONTENT from the menu. Click on the ALLOWED SITES OR EXCEPTIONS button (depending on what version you have), enter www.quicktracsw.com, and then click on the ALLOW button.



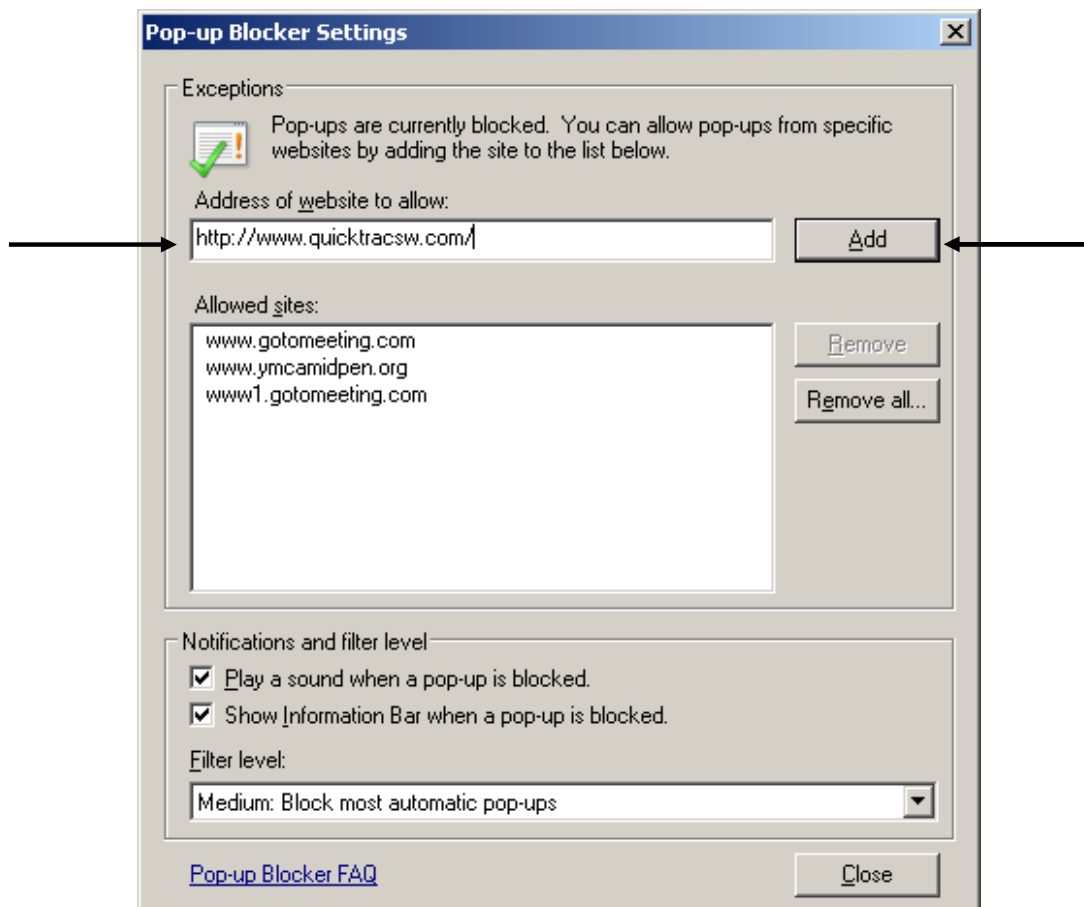
Pop-Up Blockers and QuickTrac

Allowing Pop-Ups from www.quicktracsw.com in Internet Explorer

From within IE, go to TOOLS > POP-UP BLOCKER > POP-UP BLOCKER SETTINGS



In the POP-UP BLOCKER SETTINGS dialog box, type www.quicktracsw.com into the ADDRESS OF WEBSITE TO ALLOW box, and then click on the ADD button.



Create a QuickTrac Shortcut

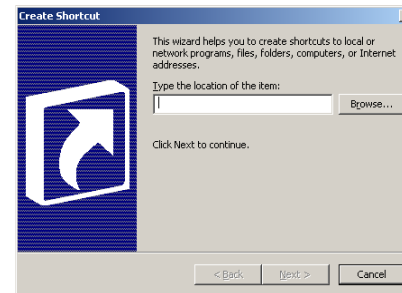
Using Internet Explorer

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.

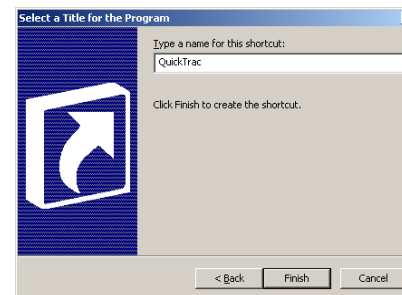


Using Mozilla Firefox

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.



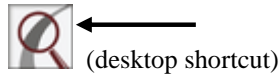
5. Type in the name for the shortcut: **QUICKTRAC**
6. Click on the finish button



User Set Up

The USERS option is a tool for Managers or Owners to add, modify, or delete employees and their account information. QuickTrac now supports up to 100 Service Technicians and 25 Service Advisors.

- 1) First login to your QuickTrac account by clicking on your desktop shortcut or via the QuickTrac website.



QuickTrac

"Learning is not compulsory...
neither is survival."
- W. Edwards Deming

August 28, 2008

[Login](#) | [Company](#) | [Knowledgebase](#) | [Clients](#)

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](#)

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

CARS
2007 leading To
The Next level

**See Webinar Broadcasts
click here**

Category	Value
82.7	158.3
88.4	280.3
241	70.9
10.8	35
2.4	16.9

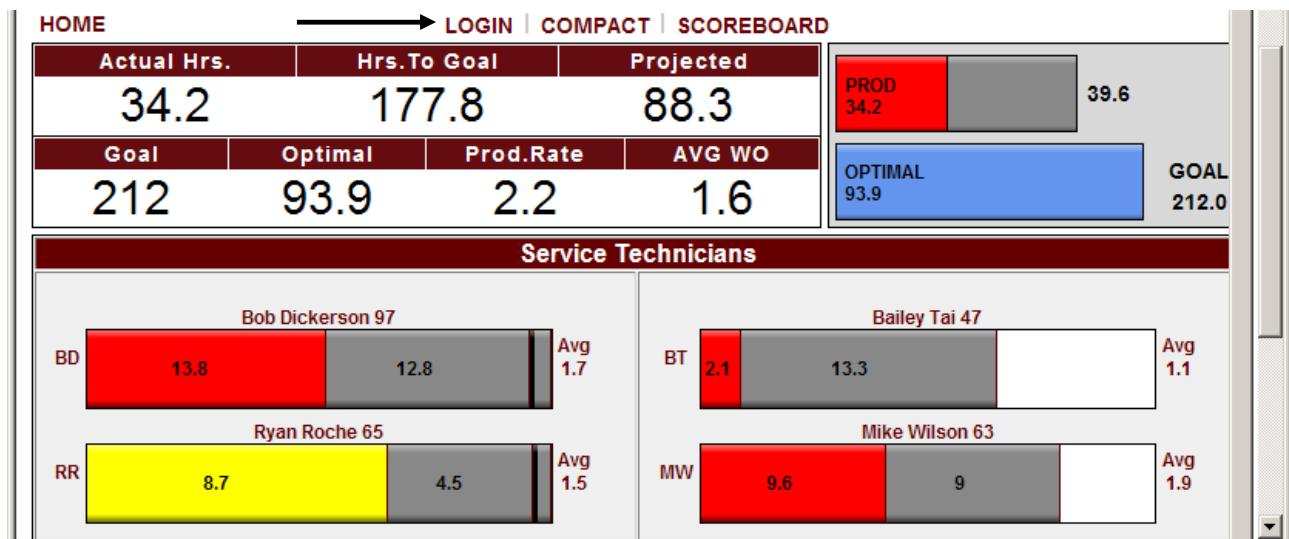
User Set Up

- 3) Enter your shop's USER NAME and PASSWORD and then click on the OK button:



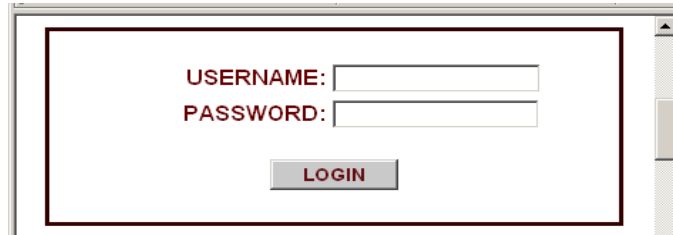
A Windows-style dialog box titled "Connect to www.quicktracsw.com". It features a blue header with a key icon. The main text states: "The server www.quicktracsw.com at QuickTrac.Biz requires a username and password." Below this are two input fields: "User name:" with a dropdown arrow and "Password:" with a text box. A checkbox labeled "Remember my password" is positioned below the password field. At the bottom are "OK" and "Cancel" buttons.

- 4) You will see the Technician Main Page. Next, click on the LOGIN link.



User Set Up

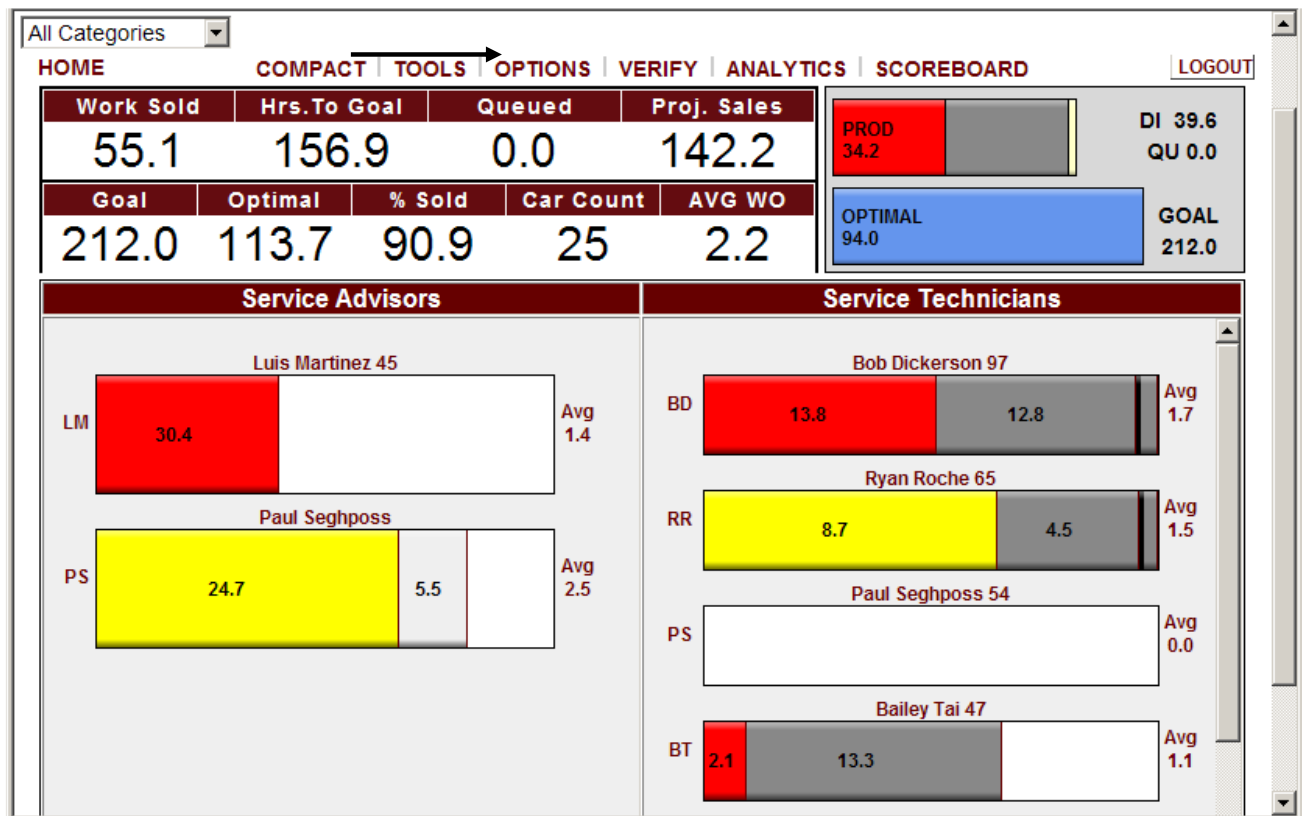
- 5) Enter your Manager/Owner USERNAME and PASSWORD. Only a Manager/Owner has access to the USERS page.



USERNAME:

PASSWORD:

- 6) You will see the Service Advisor Main Page. Next, click on OPTIONS from the menu.



User Set Up

7) Next, click on the USERS link from the menu.

ID	NAME	TYPE	STATUS
64	Barbara Walters	MGMT	A
0	Default Admin	MGMT	A
540	Peter Perfect	MGMT	A
332	Sally Garbutt	MGMT	A
2	Susan Stunning	MGMT	A
333	Cecil Bullard	OWNR	A
1	Larry Moore	OWNR	A
45	Dwayne Johnson	SRVA	A
541	Paulie Perfect	SRVA	A
97	Bill Bestech	TECH	A
63	Mike Mastertech	TECH	A
65	Neil Breschnicki	TECH	A

8a) To add a user, first enter the EMPLOYEE ID (employee id's can only be used once by one employee and cannot be re-used). 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.

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. All employees require a personal login and password except Technicians.

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

User Set Up

- 8b) To reset a forgotten password you will first have to click on the name of the person you want to modify and then click on “CLICK TO CHANGE PASSWORD”.

QuickTrac™ Auto Geniuses 09/25/08 User: Bullard

HOME COMPACT TOOLS OPTIONS VERIFY ANALYTICS SCOREBOARD
USERS WORK CODES ADCODES SHOP DISCOUNT SCHEDULING

User Manager:

Edit User

Emp. Id: 540 Type: Manager

Active: ☒ Inactive: ☐

First Name: Peter

Last Name: Perfect

Login: peterp

[Click to Change Password](#)

Update User Delete User Cancel

User List: All Users

ID	NAME	TYPE	STATUS
64	Barbara Walters	MGMT	A
0	Default Admin	MGMT	A
540	Peter Perfect	MGMT	A
332	Sally Garbutt	MGMT	A
2	Susan Stunning	MGMT	A
333	Cecil Bullard	OWNR	A
1	Larry Moore	OWNR	A
45	Dwayne Johnson	SRVA	A
541	Paulie Perfect	SRVA	A
97	Bill Bestech	TECH	A
63	Mike Mastertech	TECH	A
65	Neil Breschnicki	TECH	A

- 8c) After entering the new password and confirming it, click on the UPDATE USER button.

QuickTrac™ Auto Geniuses 09/25/08 User: Bullard

HOME COMPACT TOOLS OPTIONS VERIFY ANALYTICS SCOREBOARD
USERS WORK CODES ADCODES SHOP DISCOUNT SCHEDULING

User Manager:

Edit User

Emp. Id: 540 Type: Manager

Active: ☒ Inactive: ☐

First Name: Peter

Last Name: Perfect

Login: peterp

Password:

Confirm Password:

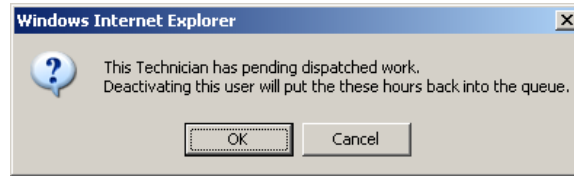
Update User Delete User Cancel

User List: All Users

ID	NAME	TYPE	STATUS
64	Barbara Walters	MGMT	A
0	Default Admin	MGMT	A
540	Peter Perfect	MGMT	A
332	Sally Garbutt	MGMT	A
2	Susan Stunning	MGMT	A
333	Cecil Bullard	OWNR	A
1	Larry Moore	OWNR	A
45	Dwayne Johnson	SRVA	A
541	Paulie Perfect	SRVA	A
97	Bill Bestech	TECH	A
63	Mike Mastertech	TECH	A
65	Neil Breschnicki	TECH	A

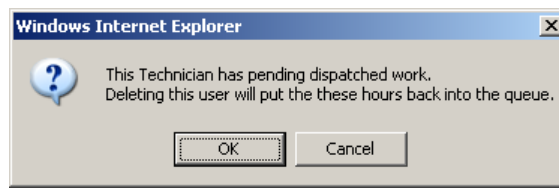
User Set Up

By default all employees are set as ACTIVE. INACTIVE status is used when an employee will not be active for a period of time or is terminated). If inactivating a technician and that technician has pending dispatched work, those hours will be put back into the queue to be dispatched to another technician. Click on the OK button to confirm inactivating the technician.



8d) To update an employee's first name, last name, or login, first click on the name of the person you want to update. Next, enter the modifications and then click on the UPDATE USER button for user to be updated. Employee ID's cannot be edited and cannot be re-used by another employee. Employee Type cannot be changed for a Service Advisor or Technician if work is already tied to that employee.

8e) To delete an employee, click on the name of the person you need to delete and then click on the DELETE USER button. If the technician has pending dispatched work orders assigned to him and the technician is deleted, those hours will be put back into the queue to be dispatched to another technician. Click on the OK button to confirm deletion of the technician. **Deleting a user cannot be undone.**



Note: Do not delete an employee and do not set him as inactive until the first day of the following business week. This way, the data will remain for the current week at a glance. You cannot re-use a terminated employee's Employee ID number because of Data Integrity purposes.

8f) Use the CANCEL button if you need to disregard any modifications you have started.

HOME COMPACT | TOOLS | OPTIONS | VERIFY | ANALYTICS | SCOREBOARD
USERS | WORK CODES | ADCODES | SHOP | DISCOUNT | SCHEDULING [LOGOUT](#)

User Manager:

Edit User

Emp. Id: Type:

Active: ☒ Inactive: ☐

First Name:

Last Name:

Login:

[Click to Change Password](#)

User List:

ID	NAME	TYPE	STATUS
64	Barbara Walters	MGMT	A
0	Default Admin	MGMT	A
540	Peter Perfect	MGMT	A
332	Sally Garbutt	MGMT	A
2	Susan Stunning	MGMT	A
333	Cecil Bullard	OWNR	A
1	Larry Moore	OWNR	A
45	Dwayne Johnson	SRVA	A
541	Paulie Perfect	SRVA	A
97	Bill Bestech	TECH	A
63	Mike Mastertech	TECH	A
65	Neil Breschnicki	TECH	A

Shop Settings

Setting up your shop and goals accurately will allow you to monitor daily and weekly results. In addition, it will help you predict and manage future results. QuickTrac allows you to customize each of your shop's settings under the **OPTIONS < SHOP** menu.

Shop Settings:

Base Settings **Contact Info**

BL Rate: The Base Labor Rate for your shop.
This is the average hourly labor rate charged to your customers.

Tech Productivity Percentage: The Tech Productivity Percentage for your shop. %
*This is the level of productivity you require from your technicians. Eight hours produced in an eight hour day is 100% productivity. Ten hours produced in an eight hour day is 125% productivity. This setting will affect your total team goal (Total scheduled tech hours * Production Goal).*

Minimum Goal: The minimum production goal for your shop.
This is the minimum number of hours that your techs must produce. If the calculated shop goal is below this value, the goal will be adjusted automatically.

Sold Hours Threshold: The Sold Hours Threshold for your shop.
This is the maximum amount of hours that can be sold on the initial work order and for every upsell. Hours that exceed this value will force a confirmation dialog box to appear. Recommended setting: 25 hours. (fractions will be discarded)

Ad-Code Default: Turn On Default Ad-Codes. ☐
Check box to turn on default ad-codes which will use the most used ad-code for your shop. Turn off ad-codes by un-checking box which forces the SA to select an ad-code for every new work order.

Verify Confirmations: Turn On Verify Confirmation messages. ☒
Confirmation dialog boxes are used to confirm when the user commits any data-altering changes, including deletions.

Graph View: Choose the default Graph view.
This sets the default view of the graphs on the Service Advisor and Service Technician main pages. The Category view shows color-coded category information along with performance status normally only seen in the Traditional view..

Sort Order: Choose the default Sort Order.
The graphs on the main-pages can be sorted (ranked) from top-to-bottom - the default value is to sort by the employee's last name. Sort options are self-explanatory. All sorting is done in order of greatest-to-least.

WO History View: Choose the default Work Order History View.
*In the Service Advisor personal page, choose the way in which Work Order History events are viewed:
Chronological View: List work order events by the order in which they happened.
Logical View: Group work order events by Sales Event.*

Timezone: Your Time Zone.
This is the timezone your shop is in.

Shop Settings

There are two tabs in SHOP SETTINGS. The BASE SETTINGS tab and the CONTACT INFO tab. The BASE SETTINGS tab is where you configure your shop's settings. The Contact Info tab is where you provide your shop's contact name, address, phone number, and email address.

The BASE SETTING'S tab contains eight rows. The BL RATE, TECH PRODUCTIVITY PERCENTAGE, MINIMUM GOAL, SOLD HOURS THRESHOLD, AD-CODE DEFAULT, VERIFY CONFIRMATIONS, TIMECLOCK, and TIMEZONE ROWS.

The BL RATE IS the average hourly labor rate that is charged to your customers.

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%).

Note: The TECH PRODUCTIVITY PERCENTAGE will affect your total team goal (total scheduled tech hours X the tech productivity percentage). The Technicians scheduled hours are set in scheduling. See the scheduling user document for more details.

The screenshot shows the 'Shop Settings' page with two tabs: 'Base Settings' and 'Contact Info'. The 'Base Settings' tab is active. The page has a navigation bar at the top with links: HOME, COMPACT, TOOLS, OPTIONS, VERIFY, ANALYTICS, SCOREBOARD, USERS, WORK CODES, ADCODES, SHOP, DISCOUNT, SCHEDULING, and a LOGOUT button. The 'Shop Settings' section contains the following fields:

- Base Settings** (tab) and **Contact Info** (tab)
- BL Rate:** The Base Labor Rate for your shop. [158.00] This is the average hourly labor rate charged to your customers.
- Tech Productivity Percentage:** The Tech Productivity Percentage for your shop. [120] % This is the level of productivity you require from your technicians. Eight hours produced in an eight hour day is 100% productivity. Ten hours produced in an eight hour day is 125% productivity. This setting will affect your total team goal (Total scheduled tech hours * Production Goal).
- Minimum Goal:** The minimum production goal for your shop. [212] This is the minimum number of hours that your techs must produce. If the calculated shop goal is below this value, the goal will be adjusted automatically.
- Sold Hours Threshold:** The Sold Hours Threshold for your shop. [25] This is the maximum amount of hours that can be sold on the initial work order and for every upsell. Hours that exceed this value will force a confirmation dialog box to appear. Recommended setting: 25 hours. (fractions will be discarded)
- Ad-Code Default:** Turn On Default Ad-Codes. ☐ Check box to turn on default ad-codes which will use the most used ad-code for your shop. Turn off ad-codes by un-checking box which forces the SA to select an ad-code for every new work order.
- Verify Confirmations:** Turn On Verify Confirmation messages. ☒ Confirmation dialog boxes are used to confirm when the user commits any data-altering changes, including deletions.
- Graph View:** Choose the default Graph view. [Traditional] This sets the default view of the graphs on the Service Advisor and Service Technician main pages. The Category view shows color-coded category information along with performance status normally only seen in the Traditional view..
- Sort Order:** Choose the default Sort Order. [Last Name] The graphs on the main-pages can be sorted (ranked) from top-to-bottom - the default value is to sort by the employee's last name. Sort options are self-explanatory. All sorting is done in order of greatest-to-least.
- WO History View:** Choose the default Work Order History View. [Logical] In the Service Advisor personal page, choose the way in which Work Order History events are viewed: Chronological View: List work order events by the order in which they happened. Logical View: Group work order events by Sales Event.
- Timezone:** Your Time Zone. [US/Pacific] This is the timezone your shop is in.

At the bottom of the form is a 'Save Changes' button.

Annotations (arrows) point to the following elements:

- Tab: Base Settings
- Tab: Contact Info
- Field: BL Rate
- Field: Tech Productivity Percentage

Shop Settings

The MINIMUM GOAL is the minimum number of hours that your Technician Team must produce. The CALCULATED TEAM GOAL will be overridden if it falls below the MINIMUM GOAL.

THE SOLD HOURS THRESHOLD allows you to set the maximum amount of hours that can be sold on the initial work order and for every upsell. This is to prevent accidental entry of large incorrect numbers in the HOURS box. Hours that exceed the sold hour's threshold will force a confirmation dialog box to appear. The recommended setting for this field is 25 hours (fractions will be discarded).

Shop Settings:

Base Settings | **Contact Info**

BL Rate: The Base Labor Rate for your shop.
This is the average hourly labor rate charged to your customers.

Tech Productivity Percentage: The Tech Productivity Percentage for your shop. %
*This is the level of productivity you require from your technicians. Eight hours produced in an eight hour day is 100% productivity. Ten hours produced in an eight hour day is 125% productivity. This setting will affect your total team goal (Total scheduled tech hours * Production Goal).*

Minimum Goal: The minimum production goal for your shop.
This is the minimum number of hours that your techs must produce. If the calculated shop goal is below this value, the goal will be adjusted automatically.

Sold Hours Threshold: The Sold Hours Threshold for your shop.
This is the maximum amount of hours that can be sold on the initial work order and for every upsell. Hours that exceed this value will force a confirmation dialog box to appear. Recommended setting: 25 hours. (fractions will be discarded)

WorkOrders

ALL WORK DISPATCHED

Dispatched WorkOrders

Sorted By: ☒ New ☐ Old

Active WOs

- 4754 - 3.3 hrs
- 4750 - 3.3 hrs
- 4752 - 1.3 hrs
- 4749 - 1.8 hrs
- 4741 - 1.0 hrs
- 4747 - 1.0 hrs
- 4746 - 2.0 hrs
- 4736 - 2.0 hrs
- 4730 - 1.4 hrs
- 4735 - 0.5 hrs

Search/New WO:

[Create Upsell]

W/O #: 4754

Ad Code: Preferred Customer

Sold By:

Category:

Source:

Brand:

Tech Credited:

Sold Hours:

Sold Dollars:

Declined Hours:

Declined Dollars:

Save Upsell

History:

Date	Event
2008-09-12	WO Created
2008-09-12	Initial Sale for 3.3 hrs
2008-09-12	Dispatched 3.3 hrs

[Dispatch Work - 0.00 hours available]

Work Sold	Hrs. To Goal	% Sold	Proj. Sales
113.7	85.8	77.1	120.3
Goal	Optimal	Declined	Car Count
199.5	188.5	33.7	60
	AVG WO		
	1.9		

SOLD 113.7 **33.7**

OPTIMAL 188.5 **GOAL** 199.5

Shop Settings

The AD-CODE DEFAULT option is toggled to an OFF state (unchecked box).

Shop Settings:

Base Settings **Contact Info**

BL Rate: The Base Labor Rate for your shop.
This is the average hourly labor rate charged to your customers.

Tech Productivity Percentage: The Tech Productivity Percentage for your shop. %
This is the level of productivity you require from your technicians. Eight hours produced in an eight hour day is 100% productivity. Ten hours produced in an eight hour day is 125% productivity. This setting will affect your total team goal (Total scheduled tech hours * Production Goal).

Minimum Goal: The minimum production goal for your shop.
This is the minimum number of hours that your techs must produce. If the calculated shop goal is below this value, the goal will be adjusted automatically.

Sold Hours Threshold: The Sold Hours Threshold for your shop.
This is the maximum amount of hours that can be sold on the initial work order and for every upsell. Hours that exceed this value will force a confirmation dialog box to appear. Recommended setting: 25 hours. (fractions will be discarded)

Ad-Code Default: Turn On Default Ad-Codes. ☐
Check box to turn on default ad-codes which will use the most used ad-code for your shop. Turn off ad-codes by un-checking box which forces the SA to select an ad-code for every new work order.

Having the AD-CODE DEFAULT option in an OFF state forces the AD CODE list box (as shown below) on the Service Advisor Personal Page to display the default message of "SELECT AD CODE" in the list box. This is the suggested setting since this promotes accurate data entry and prevents the Service Advisor from skipping over this field and not selecting the appropriate Ad-Code.

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

If the Owner, Manager, and Service Advisor are confident about having accurate ad-codes by checking it each time they create a work order then creating a work order can be even faster by choosing the AD-CODE DEFAULT to be on an ON state (checked box). The ad code will then display the most-frequently-used ad code for that shop and will only have to be changed when the ad-code differs.

WorkOrders

ALL WORK DISPATCHED

Dispatched WorkOrders

Active WOs

101 - 6.0 hrs sold
100 - 3.0 hrs sold
99 - 6.0 hrs sold
83 - 5.0 hrs sold
77 - 3.0 hrs sold
74 - 5.0 hrs sold
66 - 3.0 hrs sold

Search New WO:

COMPACT **TIMESHEET** **HOME** **LOGOUT**

Return to Bar Graph View

W/O # Ad Code:

New Work Order

Sold Work

Hours: Dollars:

Sold By:

Unsold Work

Hours: Dollars:

Create W/O

Dispatch Work To:

NBT Code:

Work Sold	Hrs.To Goal	% Sold	Proj. Sales
14.0	46	73.7	39.7
Goal	Optimal	Unsold	Car Count
60.0	21.1	5	4

SOLD 14.0 5.0

OPTIMAL 21.1 GOAL 60

Shop Settings

The VERIFY CONFIRMATION, if turned on (check marked), confirmation dialog boxes will be displayed confirming any operation by the user which changes existing data (data deletes, data edits, and data replacements) in the Verify module. If the verify confirmation dialog boxes are not desired, uncheck this option.

GRAPH VIEW sets the default view of the bar graphs located on the Service Advisor and Service Technician Main pages. The CATEGORY VIEW shows color-coded category information along with performance status. The TRADITIONAL VIEW shows the performance status only.

The SORT ORDER allows you to choose how to sort the graphs on the main-pages. The default value is to sort by the employee's last name. You can also sort by completed and pending, completed work only, or unsold and pending work. All sorting is done in order of greatest-to-least.

The WO HISTORY view allows you to choose how HISTORY displays on the Service Advisor page. The default is to show the "CHRONOLOGICAL" order which displays the work order history items in the order in which they were created. As an option, you can also select "LOGICAL" from the drop down box which groups the work order events under their respective sales event. So, under each color-coded sales event, you would see the dispatch event(s) indented graphically. And under the dispatch event(s) you would see the indented work produced events.

The TIME ZONE provides you with a dropdown box to select the time zone your shop is in.

The screenshot shows the 'Shop Settings' page with a navigation bar at the top containing links: HOME, COMPACT, TOOLS, OPTIONS, VERIFY, ANALYTICS, SCOREBOARD, LOGOUT, USERS, WORK CODES, ADCODES, SHOP, DISCOUNT, and SCHEDULING. The 'Shop Settings' section has two tabs: 'Base Settings' (selected) and 'Contact Info'. The 'Base Settings' section contains several fields with labels and descriptions:

- BL Rate:** The Base Labor Rate for your shop. [158.00] This is the average hourly labor rate charged to your customers.
- Tech Productivity Percentage:** The Tech Productivity Percentage for your shop. [120] % This is the level of productivity you require from your technicians. Eight hours produced in an eight hour day is 100% productivity. Ten hours produced in an eight hour day is 125% productivity. This setting will affect your total team goal (Total scheduled tech hours * Production Goal).
- Minimum Goal:** The minimum production goal for your shop. [212] This is the minimum number of hours that your techs must produce. If the calculated shop goal is below this value, the goal will be adjusted automatically.
- Sold Hours Threshold:** The Sold Hours Threshold for your shop. [25] This is the maximum amount of hours that can be sold on the initial work order and for every upsell. Hours that exceed this value will force a confirmation dialog box to appear. Recommended setting: 25 hours. (fractions will be discarded)
- Ad-Code Default:** Turn On Default Ad-Codes. ☐ Check box to turn on default ad-codes which will use the most used ad-code for your shop. Turn off ad-codes by un-checking box which forces the SA to select an ad-code for every new work order.
- Verify Confirmations:** Turn On Verify Confirmation messages. ☒ Confirmation dialog boxes are used to confirm when the user commits any data-altering changes, including deletions.
- Graph View:** Choose the default Graph view. [Traditional] This sets the default view of the graphs on the Service Advisor and Service Technician main pages. The Category view shows color-coded category information along with performance status normally only seen in the Traditional view.
- Sort Order:** Choose the default Sort Order. [Last Name] The graphs on the main-pages can be sorted (ranked) from top-to-bottom - the default value is to sort by the employee's last name. Sort options are self-explanatory. All sorting is done in order of greatest-to-least.
- WO History View:** Choose the default Work Order History View. [Logical] In the Service Advisor personal page, choose the way in which Work Order History events are viewed: Chronological View: List work order events by the order in which they happened. Logical View: Group work order events by Sales Event.
- Timezone:** Your Time Zone. [US/Pacific] This is the timezone your shop is in.

At the bottom of the form is a 'Save Changes' button. On the left side of the screenshot, there are five horizontal arrows pointing to the 'Verify Confirmations', 'Graph View', 'Sort Order', 'WO History View', and 'Timezone' sections.

Click on the SAVE CHANGES button to confirm any and all changes to your shop's BASE SETTINGS.

Shop Settings

Within the CONTACT INFO tab, type in your shop name, address, contact name, phone number, and email address.

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Shop Settings:

Base Settings

Contact Info

Shop Name:	<input type="text" value="Larrys AutoWorks"/>	Contact Name:	<input type="text" value="Larry Moore"/>
Address 1:	<input type="text" value="2526 Leghorn Street"/>	Phone:	<input type="text" value="650-968-5202"/>
Address 2:	<input type="text"/>	Email:	<input type="text" value="larry@autoworks.com"/>
City:	<input type="text" value="Mountain View"/>	<div>Save Changes</div>	
State:	<input type="text" value="California"/>		
Zip Code:	<input type="text" value="94043"/>		

Click on the SAVE CHANGES button to confirm your contact information.

Scheduling

DYNAMIC SCHEDULING allows you to customize your employee’s and shop’s days, times, and hours. In addition, you can customize your shop’s work week. 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.

DYNAMIC SCHEDULING is located under the OPTIONS < SCHEDULING menu.

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Dynamic Scheduling:

Base Settings

Default Schedules

Closed Days

Weekly Schedules

Start Day:

The first day of your Work Week. Monday

Shop Days:

The number of days your shop is open per week. 5

This is the number of days your shop is open per week. It is used to help calculate personal daily goals.

End Day:

The day your work week ends. Saturday

This is the last day of the week that your techs will be able to enter time and have it counted toward the goal for the current week. All time entered after this day will count toward the following week.

Start Time:

The time of day your work day starts. 8 : 00 AM

This setting, along with the Shop Hours setting below, helps to calculate real-time "optimal" goals.

Shop Hours:

The number of hours in a normal work day for your shop. 8

This is the number of hours in a normal work day for your techs. Together with the Start Time above, it helps to calculate real-time "optimal" goals.

Save Changes

Scheduling

Once you are in DYNAMIC SCHEDULING you see four tabs. The BASE SETTINGS tab, the DEFAULT SCHEDULES tabs, the CLOSED DAYS tab, and WEEKLY SCHEDULES tab.

The first tab is the BASE SETTINGS tab. Here is where you assign your shop's START DAY, SHOP DAYS, END DAY, START TIME and SHOP HOURS.

The first setting is 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.

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. **Note:** If the SHOP DAYS setting is changed, SCHEDULING data will be cleared and will need to be edited as well.

The third setting is the END DAY setting. This setting is where you assign 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, from the example just mentioned, your shop can be a Monday through Friday shop but if time is entered on a Saturday then that time is credited on that day for the current work week.

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. It is also the number of hours in a standard work day for your Technicians. This setting, as well as the START TIME setting, helps to calculate real-time "OPTIMAL" goals.

The screenshot shows the 'Dynamic Scheduling: Base Settings' tab. At the top, there is a navigation bar with links: HOME, COMPACT, TOOLS, OPTIONS, VERIFY, ANALYTICS, SCOREBOARD, LOGOUT, USERS, WORK CODES, ADCODES, SHOP, DISCOUNT, and SCHEDULING. The 'SCHEDULING' link is highlighted. Below the navigation bar, the 'Dynamic Scheduling:' section has four tabs: 'Base Settings' (selected), 'Default Schedules', 'Closed Days', and 'Weekly Schedules'. The 'Base Settings' tab contains the following settings:

- Start Day:** The first day of your Work Week.
- Shop Days:** The number of days your shop is open per week.
This is the number of days your shop is open per week. It is used to help calculate personal daily goals.
- End Day:** The day your work week ends.
This is the last day of the week that your techs will be able to enter time and have it counted toward the goal for the current week. All time entered after this day will count toward the following week.
- Start Time:** The time of day your work day starts. :
This setting, along with the Shop Hours setting below, helps to calculate real-time "optimal" goals.
- Shop Hours:** The number of hours in a normal work day for your shop.
This is the number of hours in a normal work day for your techs. Together with the Start Time above, it helps to calculate real-time "optimal" goals.

At the bottom of the settings section is a 'Save Changes' button.

Scheduling

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 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 the 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 standard work week, click on the UPDATE button to confirm. If there is more than one employee's standard schedule to make changes to, click on the SAVE CHANGES button at the bottom of the page to confirm all employees' changes.

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Dynamic Scheduling:

Base Settings
Default Schedules
Closed Days
Weekly Schedules

Default Schedules are the hours that your employees work in a normal week. These values will be used in all cases where there are not changes made for a specific week.

? = Business Week.
? = Outside of Work Week.
? = Outside of Business Week / Inside of Work Week.

		Sun	Mon	Tue	Wed	Thu	Fri	Sat
Bailey Tai 47 (TECH)	Update	<input type="text" value="0"/>	<input type="text" value="8"/>	<input type="text" value="8"/>	<input type="text" value="8"/>	<input type="text" value="8"/>	<input type="text" value="8"/>	<input type="text" value="0"/>
Bob Dickerson 97 (TECH)	Update	<input type="text" value="0"/>	<input type="text" value="8"/>	<input type="text" value="8"/>	<input type="text" value="8"/>	<input type="text" value="8"/>	<input type="text" value="8"/>	<input type="text" value="0"/>
Mike Wilson 63 (TECH)	Update	<input type="text" value="0"/>	<input type="text" value="8"/>	<input type="text" value="8"/>	<input type="text" value="8"/>	<input type="text" value="8"/>	<input type="text" value="8"/>	<input type="text" value="0"/>
Paul Seghposs 54 (TECH)	Update	<input type="text" value="0"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="0"/>
Ryan Roche 65 (TECH)	Update	<input type="text" value="0"/>	<input type="text" value="4"/>	<input type="text" value="4"/>	<input type="text" value="4"/>	<input type="text" value="4"/>	<input type="text" value="4"/>	<input type="text" value="0"/>
Luis Martinez 45 (SRVA)	Update	<input type="text" value="0"/>	<input type="text" value="8"/>	<input type="text" value="8"/>	<input type="text" value="8"/>	<input type="text" value="8"/>	<input type="text" value="8"/>	<input type="text" value="0"/>
Paul Seghposs (SRVA)	Update	<input type="text" value="0"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="0"/>

Save Changes

Scheduling

The third tab is the CLOSED DAYS tab. This tab is where you schedule any CLOSED DAYS when the shop will be closed 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 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. If your shop will be open part of that day enter the number of hours your shop will be open. 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.

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[USERS](#) | [WORK CODES](#) | [ADCODES](#) | [SHOP](#) | [DISCOUNT](#) | [SCHEDULING](#)

Dynamic Scheduling:

Base Settings

Default Schedules

Closed Days

Weekly Schedules

Closed Days are days where your shop is closed for all or part of the day. Checking the box under to a certain day will allow you to enter the number of hours your shop will be open on that day. The default 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.

☐ = Business Week. ☐ = Outside of Work Week. ☐ = Outside of Business Week / Inside of Work Week.






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Sun	Mon	Tue	Wed	Thu	Fri	Sat
<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>

Save Changes

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. 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.

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Dynamic Scheduling:

Base Settings
Default Schedules
Closed Days
Weekly Schedules

Weekly schedules are for specifying an employee schedule for a specific week. You can set schedules up to three weeks in the future. The default schedules are pre-filled here for your convenience. If there was an off-day scheduled in the given week, you cannot enter more hours for that day than was allowed.

? = Business Week.
? = Outside of Work Week.
? = Outside of Business Week / Inside of Work Week.

? = Closed Day / Zero Hours.
? = Closed Day / Restricted Hours.

<<< Prev
Sep. 29th through Oct. 3rd
Next >>>

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Bailey Tai 47 (TECH) Update	0	8	8	8	8	8	0
Bob Dickerson 97 (TECH) Update	0	8	8	8	8	8	0
Mike Wilson 63 (TECH) Update	0	8	8	8	8	8	0
Paul Seghposs 54 (TECH) Update	0	0	0	0	0	0	0
Ryan Roche 65 (TECH) Update	0	4	4	4	4	4	0
Luis Martinez 45 (SRVA) Update	0	8	8	8	8	8	0
Paul Seghposs (SRVA) Update	0	0	0	1	1	1	0

Save Changes

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 a source!**

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 the following AD CODE defaults in the program. You can add to or change them on the SERVICE ADVISOR MAIN PAGE under the OPTIONS menu. Only Manager/Owners can add or change AD CODES. AD CODES can be up to 4-digits (see below for examples).

For instance; YP is the default AD CODE for Yellow Pages, however, we know that many businesses have ads in more than one book so more specific AD CODES might be YPV = Yellow Pages Verizon and YPW = Yellow Pages West. NP is the default AD CODE for Newspaper, however ads are often placed in different papers so more specific AD CODES might be NPLA = LA Times, NPSF = San Francisco Chronicle, NPLD = Local Daily Newspaper. WEB is the default AD CODE for the World Wide Web, additional AD CODES in this category might include; WEBY for Yahoo, WEBG for Google, WEBI for Icarumba. This same logic applies for any specific category that brings customers to your door, the more specific and detailed you are the more valuable information you will gain in the long run.

AAA	- Triple AAA referral
CI	- Community Involvement
CP	- Customer Programs
DB	- Drive-by (saw us and dropped in)
DM	- Direct Mail
EC	- Existing Customer
NP	- Newspaper
REF	- Referrals
SV	- Shop Vehicle
WEB	- World Wide Web
YP	- Yellow Pages
LPF	- License Plate Frames

Ad Codes

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.

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Sallys Shop
09/29/08
User: Sally
LOGOUT

AdCode: Item Name:

NEW ITEM

AdCode	Item Name
AAA	AAA referral
CI	Community Involvement
CP	Customer Programs
DM	Direct Mail
DB	Drive-by
EC	Existing customer
LPF	License Plate Frames
NP	Newspaper
REF	Referrals
SV	Shop Vehicle
WEB	WWW (Internet)
YP	Yellow Pages

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Ad Codes

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.

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HOME COMPACT | TOOLS | OPTIONS | VERIFY | ANALYTICS | SCOREBOARD
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Sallys Shop
09/29/08
User: Sally
LOGOUT

AdCode: CI Item Name: Community Involvement

UPDATE DELETE CANCEL

AdCode	Item Name
AAA	AAA referral
CI	Community Involvement
CP	Customer Programs
DM	Direct Mail
DB	Drive-by
EC	Existing customer
LPF	License Plate Frames
NP	Newspaper
REF	Referrals
SV	Shop Vehicle
WEB	WWW (Internet)
YP	Yellow Pages

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Ad Codes

In the SHOP SETTINGS, the AD-CODE DEFAULT option is toggled to an OFF state (unchecked box).

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Shop Settings:

Base Settings Contact Info

BL Rate: The Base Labor Rate for your shop. 75.00
This is the average hourly labor rate charged to your customers.

Tech Productivity Percentage: The Tech Productivity Percentage for your shop. 120 %
*This is the level of productivity you require from your technicians. Eight hours produced in an eight hour day is 100% productivity. Ten hours produced in an eight hour day is 125% productivity. This setting will affect your total team goal (Total scheduled tech hours * Production Goal).*

Minimum Goal: The minimum production goal for your shop. 0
This is the minimum number of hours that your techs must produce. If the calculated shop goal is below this value, the goal will be adjusted automatically.

Sold Hours Threshold: The Sold Hours Threshold for your shop. 25
This is the maximum amount of hours that can be sold on the initial work order and for every upsell. Hours that exceed this value will force a confirmation dialog box to appear. Recommended setting: 25 hours. (fractions will be discarded)

Ad-Code Default: Turn On Default Ad-Codes. ☐
Check box to turn on default ad-codes which will use the most used ad-code for your shop. Turn off ad-codes by un-checking box which forces the SA to select an ad-code for every new work order.

Having the AD-CODE DEFAULT option on an OFF state forces the AD CODE list box (as shown below) on the Service Advisor Personal Page to display the default message of "SELECT AD CODE" in the list box. This is the suggested setting since this promotes accurate data entry and prevents the Service Advisor from skipping over this field and not selecting the appropriate Ad-Code.

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

If the Owner, Manager, and Service Advisor are confident about having accurate ad-codes by checking it each time they create a work order then creating a work order can be even faster by choosing the AD-CODE DEFAULT to be on an ON state (checked box). The ad code will then display the most-frequently-used ad code for that shop and will only have to be changed when the ad-code differs.

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WorkOrders

Return to Bar Graph View

Work Order Number: newwo

[Create New Work Order] History:

W/O #: newwo F D Date Event

Ad Code: Select Ad-Code

Sold By: Luis Martinez 45

Category: Customer Pay

Source: None Selected

Brand:

Tech Credited: Select Tech

Sold Hours:

Sold Dollars:

Declined Hours:

Declined Dollars:

Create WO

[Dispatch Work - 0.00 hours available]

Search/New WO:

Work Sold	Hrs.To Goal	% Sold	Proj. Sales	
8.9	188.3	100.0	44.5	
Goal	Optimal	Declined	Car Count	AVG WO
197.2	39.4	0.0	9	1.0

SOLD 8.9 0.0

OPTIMAL 39.4

GOAL 197.2

Work Codes

WORK CODES are accessed under the OPTIONS menu. Work Categories are completely shop-configurable and are assigned when work is sold in order 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.

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.

***Internal** (Blue) – Active for dealerships

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

Any categories seen highlighted in green is default for the specific work category and will be seen in the drop down boxes. Any category seen in grey is an inactive category.

QuickTrac™

Sallys Shop
09/29/08
User: Sally
[LOGOUT]

HOME COMPACT TOOLS OPTIONS VERIFY ANALYTICS SCOREBOARD
USERS WORK CODES ADCODES SHOP DISCOUNT SCHEDULING

Work Categories

Category:

- Customer Pay
- Non-Billable Time
- Internal
- Mfg Warranty

Source:

- Tires
- Oil Change
- Fluids Flush
- Select Source

Brand:

- None Selected
- Good Year
- Mitchellin

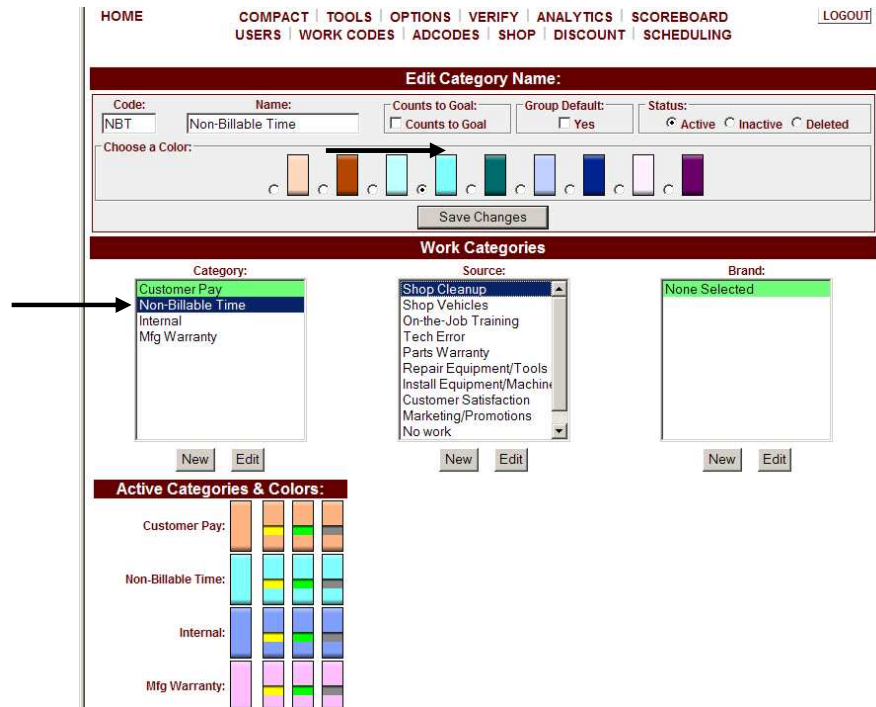
[New] [Edit] [New] [Edit] [New] [Edit]

Active Categories & Colors:

Category	Color 1	Color 2	Color 3	Color 4
Customer Pay:	Orange	Orange	Orange	Orange
Non-Billable Time:	Teal	Teal	Teal	Teal
Internal:	Blue	Blue	Blue	Blue
Mfg Warranty:	Purple	Purple	Purple	Purple

Work Codes

A color selection must be specified when creating a new category. When creating a new category, the colors that have already been specified to a category are not displayed. Only the colors that are available to choose from are displayed. Sub-categories Source and Brand will be represented with the same color code as their root category.



The second level of default work codes is represented by the SOURCE. By default, all shops, including dealerships, receive the following Source items, which are linked to the parent category item: NON-BILLABLE time.

- Shop Cleanup
- Shop Vehicles
- On-the-Job Training
- Labor Warranty
- Parts Warranty
- Repair Equipment/Tools
- Install Equipment/Machine
- Customer Satisfaction
- Marketing/Promotions
- No Work

We recommend that you have sources for any and all NON-BILLABLE time. NON-BILLABLE time is an expense that can easily get out of hand.

Tracking and monitoring NON-BILLABLE time will help you control those expenses as well as monitor the quality of your parts suppliers, your customer service staff, and your technicians. You will also know what those loss leaders and giveaways are really costing you. And you will know right now while you can still do something about it. Below are the default NON-BILLABLE SOURCES provided. NON-BILLABLE sources can only be modified while logged in as a Manager or Owner.

Work Codes

Some other examples of Non-Billable Sources that you may want to create for your shop are shown below.

Coupon or promotion: Any coupons or promotions given to the customer

Shop vehicle: Paying technicians to work on shop vehicles

On the job training: Paying a tech a little more because the book time was actually too low

Tech error: Paying technician to repair another technician's work (maybe after firing a tech and his work comes back and has to be fixed by another Technician!)

Parts warranty: Paying technician to redo a job because the part is defective

Install equipment/machinery: Paying technicians to install/repair shop equipment

Customer satisfaction: Paying a technician to do something to make a customer happy

Marketing/promotions: Paying a technician to perform work for free due to a loss leader or giveaway program

The screenshot displays the 'Edit Category Name' window in QuickTrac Software. At the top, the title bar reads 'Edit Category Name:'. Below it, there are input fields for 'Code:' (containing 'NBT') and 'Name:' (containing 'Non-Billable Time'). To the right of these fields are checkboxes for 'Counts to Goal:' (unchecked) and 'Group Default:' (unchecked). Further right is a 'Status:' section with three radio buttons: 'Active' (selected), 'Inactive', and 'Deleted'. Below these fields is a 'Choose a Color:' section with a row of ten color swatches. A 'Save Changes' button is located at the bottom of this section.

Below the 'Edit Category Name' window is the 'Work Categories' section. It contains three main panels: 'Category:', 'Source:', and 'Brand:'. The 'Category:' panel has a list box with four items: 'Customer Pay' (highlighted in green), 'Non-Billable Time' (highlighted in blue), 'Internal', and 'Mfg Warranty'. Below this list are 'New' and 'Edit' buttons. The 'Source:' panel has a list box with 'None Selected' at the top, followed by a list of sources: 'Customer Satisfaction', 'Coupon Special', 'Shop Error', 'Valued Customer', 'Employee', 'Preferred Customer Program', and 'Because I said so'. Below this list are 'New' and 'Edit' buttons. The 'Brand:' panel is currently empty and has 'New' and 'Edit' buttons below it.

At the bottom of the screenshot is the 'Active Categories & Colors:' section. It shows a grid of color swatches for each category. The categories listed are 'Customer Pay', 'Non-Billable Time', 'Internal', and 'Mfg Warranty'. Each category has four color swatches displayed next to it, showing different color combinations.

Work Codes

The third and final level of work codes is the BRAND. Brands are created to further track the sales of the specified product. For each work code classified at the Brand level, there exists a work code at the Source level. Likewise, for each work code at the Source level, there exists a work code at the Category level.

The Category, Source, and Brand Work Categories are created using the NEW button and can be edited using the EDIT button below each Work Category's box.

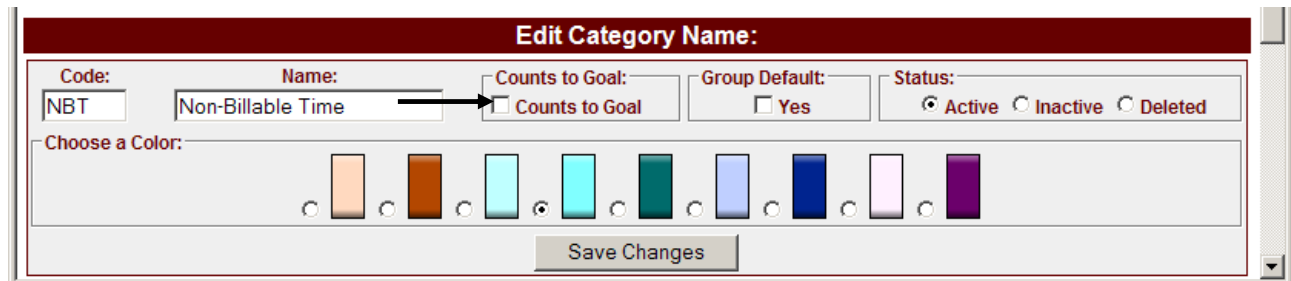
The screenshot displays the 'Edit Category Name' form and the 'Work Categories' section. The 'Edit Category Name' form includes fields for Code (NBT), Name (Non-Billable Time), Counts to Goal (unchecked), Group Default (unchecked), and Status (Active selected). Below these fields is a 'Choose a Color' palette with 12 color swatches. A 'Save Changes' button is at the bottom of the form. The 'Work Categories' section contains three columns: Category, Source, and Brand. The Category column lists Customer Pay, Non-Billable Time, Internal, and Mfg Warranty. The Source column lists None Selected, Customer Satisfaction, Coupon Special, Shop Error, Valued Customer, Employee, Preferred Customer Program, and Because I said so. The Brand column is empty. Each column has 'New' and 'Edit' buttons. Below the 'Work Categories' section is the 'Active Categories & Colors' section, which shows a grid of color swatches for each category, with labels for Customer Pay, Non-Billable Time, Internal, and Mfg Warranty.

The color for each parent level category can be defined through the edit button. Any color that has already been chosen for a category will disappear from the available palette. A total of twelve colors are available to choose from.

Mousing over each active CATEGORY/COLOR swatch at the bottom of the screen will show its text description. Each of those categories also shows what the category view will look like with aged work (yellow), produced work (green), or verified work (grey).

Work Codes

To update a category, click on the category name and then click on the EDIT button. You will then be able to edit the NBT CODE, NAME, whether the code “COUNTS TO GOAL”, GROUP DEFAULT, or the category’s STATUS.



The screenshot shows a dialog box titled "Edit Category Name:". It contains several input fields and a "Save Changes" button. The "Code:" field contains "NBT". The "Name:" field contains "Non-Billable Time". The "Counts to Goal:" field has a checkbox labeled "Counts to Goal" which is currently unchecked. The "Group Default:" field has a checkbox labeled "Yes" which is unchecked. The "Status:" field has three radio buttons: "Active" (selected), "Inactive", and "Deleted". Below these fields is a "Choose a Color:" section with a row of ten color swatches. The "Save Changes" button is at the bottom right.

The CODE is used by QuickTrac Software to identify the work code. The Code is required and the maximum amount of characters that can be used for the Code is five.

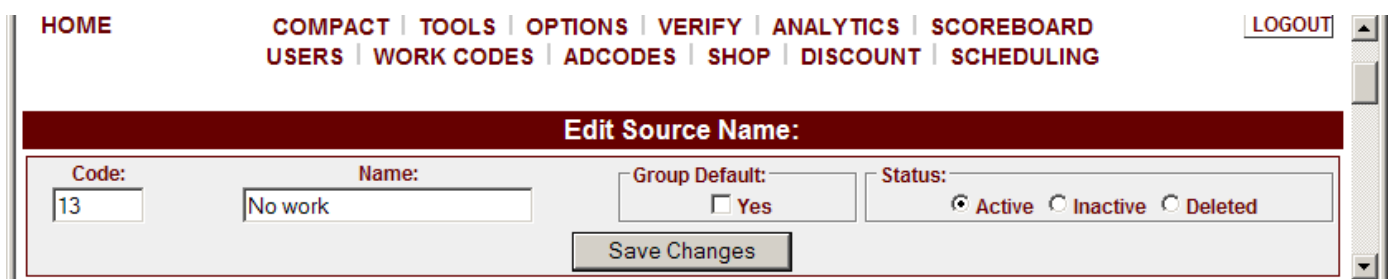
The NAME of the category you enter will appear in the category drop down list on the Service Advisor page that must be selected when a new work order is created.

Work entered that count towards sales goals “COUNTS TO GOAL” are transactions that represent actual revenue for the shop. Categories that would not be marked as “COUNTS TO GOAL” are transactions that would not represent actual revenue for the shop, e.g. Non-Billable time.

When creating a new category, select the ACTIVE radio button. Use the INACTIVE selection when a category will no longer be used. Inactive codes will appear in the list boxes with a dark gray background and may be edited at a later time by the shop user.

If editing a SOURCE category, you will see the GROUP DEFAULT box. The Group default box marks the selected work code as the default code that appears in the Category’s drop-down list box on the Service Advisor page.

To delete a code, in the STATUS box, select the DELETE radio button. You will be presented with a confirmation dialogue. When a category or a source item is deleted, all sub-categories will also be deleted. Deletion is permanent and cannot be un-done. WORK CATEGORIES marked as deleted will no longer appear in the selection box.



The screenshot shows a web application interface with a navigation bar at the top containing links: HOME, COMPACT, TOOLS, OPTIONS, VERIFY, ANALYTICS, SCOREBOARD, USERS, WORK CODES, ADCODES, SHOP, DISCOUNT, SCHEDULING, and a LOGOUT button. Below the navigation bar is a dialog box titled "Edit Source Name:". It contains several input fields and a "Save Changes" button. The "Code:" field contains "13". The "Name:" field contains "No work". The "Group Default:" field has a checkbox labeled "Yes" which is unchecked. The "Status:" field has three radio buttons: "Active" (selected), "Inactive", and "Deleted". The "Save Changes" button is at the bottom right.

Work Codes

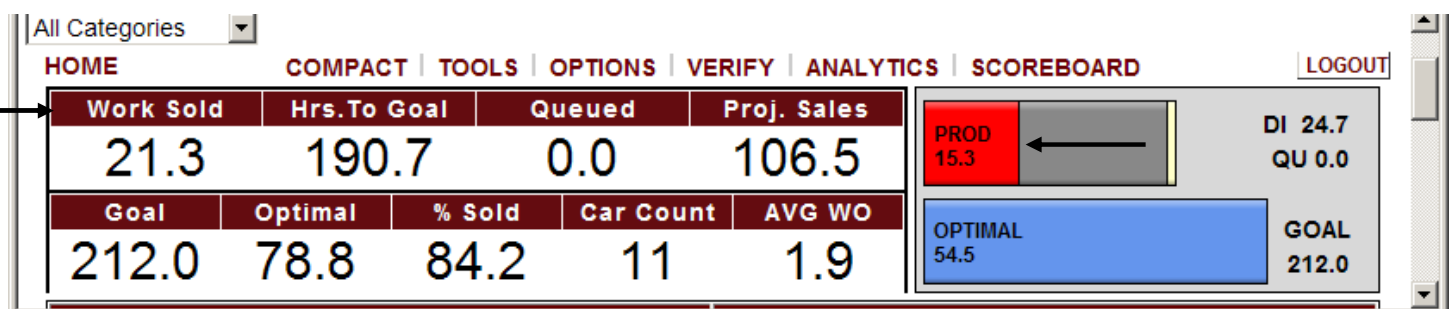
Categories will only be included in the Work Sold box and on the Produced Bar Graph on the Service Advisor page ONLY IF the “Counts to Goal” option is check marked as shown below. If you do not want the category to count toward work sold such as non-billable work (work that is performed but no money is collected from the customer), then leave unchecked.

Edit Category Name:			
Code: <input type="text" value="OK"/>	Name: <input type="text" value="Customer Pay"/>	Counts to Goal: <input checked="" type="checkbox"/> Counts to Goal	Group Default: <input checked="" type="checkbox"/> Yes
		Status: <input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Deleted	
Choose a Color: <div style="display: flex; justify-content: space-around; align-items: center;"> <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> </div>			
<input type="button" value="Save Changes"/>			

Work Categories		
Category: <div style="border: 1px solid black; padding: 5px; min-height: 150px;"> Customer Pay Non-Billable Time Internal Mfg Warranty </div> <div style="margin-top: 10px; display: flex; justify-content: space-between;"> <input type="button" value="New"/> <input type="button" value="Edit"/> </div>	Source: <div style="border: 1px solid black; padding: 5px; min-height: 150px;"> None Selected Tires Batteries Brakes Engine Oil Change Flush Computer Diagnostic Smog Check </div> <div style="margin-top: 10px; display: flex; justify-content: space-between;"> <input type="button" value="New"/> <input type="button" value="Edit"/> </div>	Brand: <div style="border: 1px solid black; height: 150px;"></div> <div style="margin-top: 10px; display: flex; justify-content: space-between;"> <input type="button" value="New"/> <input type="button" value="Edit"/> </div>

Active Categories & Colors:				
Customer Pay:				
Non-Billable Time:				
Internal:				
Mfg Warranty:				

Work Sold box and Produced Bar Graph on the Service Advisor page shown below.



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 in the web address field in your browser.



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



QuickTrac
"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

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

MOTORWATCH
Listen To Industry Experts
YOUR SOURCE FOR INSIDE AUTOMOTIVE INFORMATION

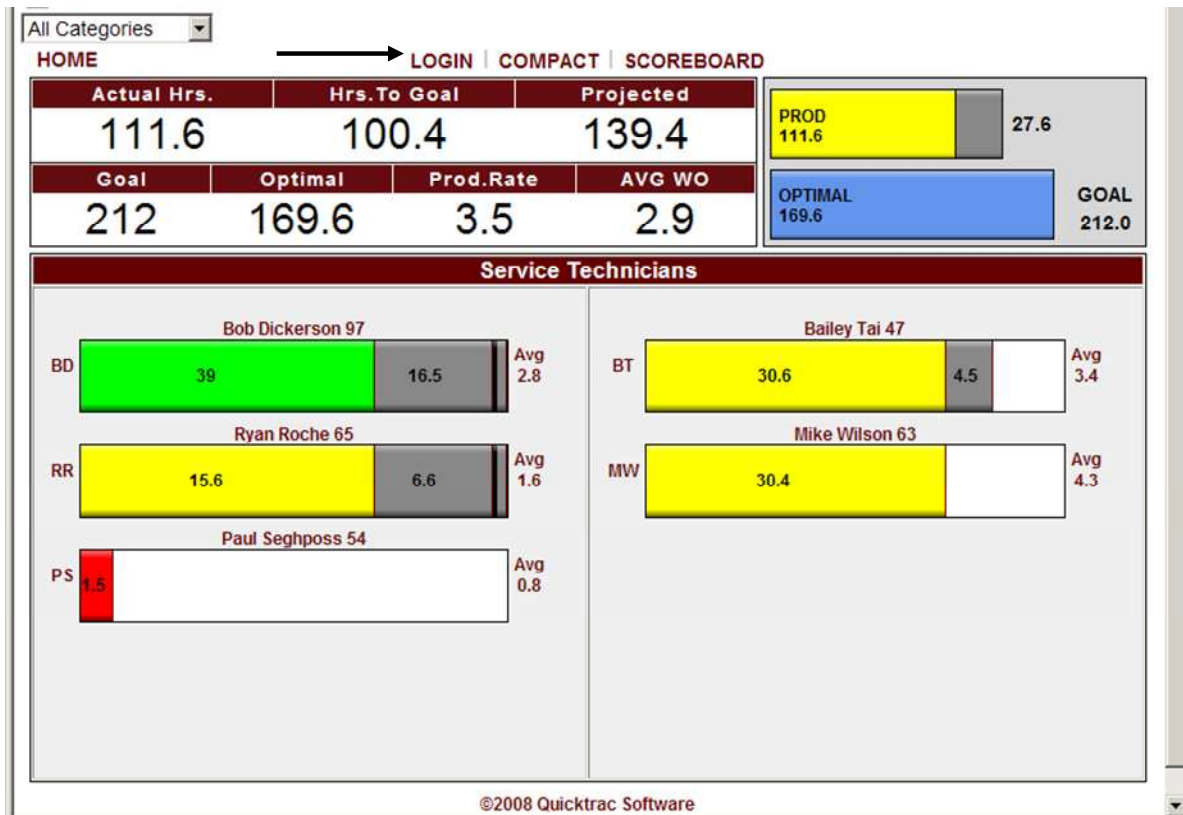
Create a New Work Order

- 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.



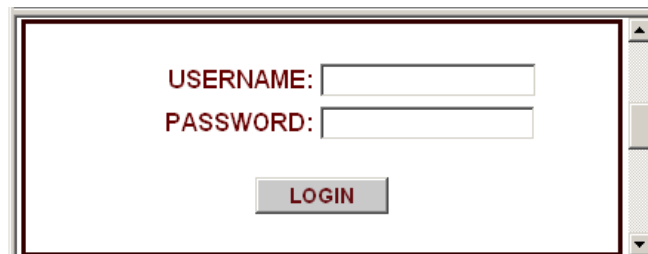
A Windows-style dialog box titled "Connect to www.quicktracsw.com". It features a blue header bar with a key icon. The main text states: "The server www.quicktracsw.com at QuickTrac.Biz requires a username and password." Below this, there are two input fields: "User name:" with a dropdown arrow and "Password:" with a standard text box. A checkbox labeled "Remember my password" is positioned below the password field. At the bottom, there are "OK" and "Cancel" buttons.

- 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.



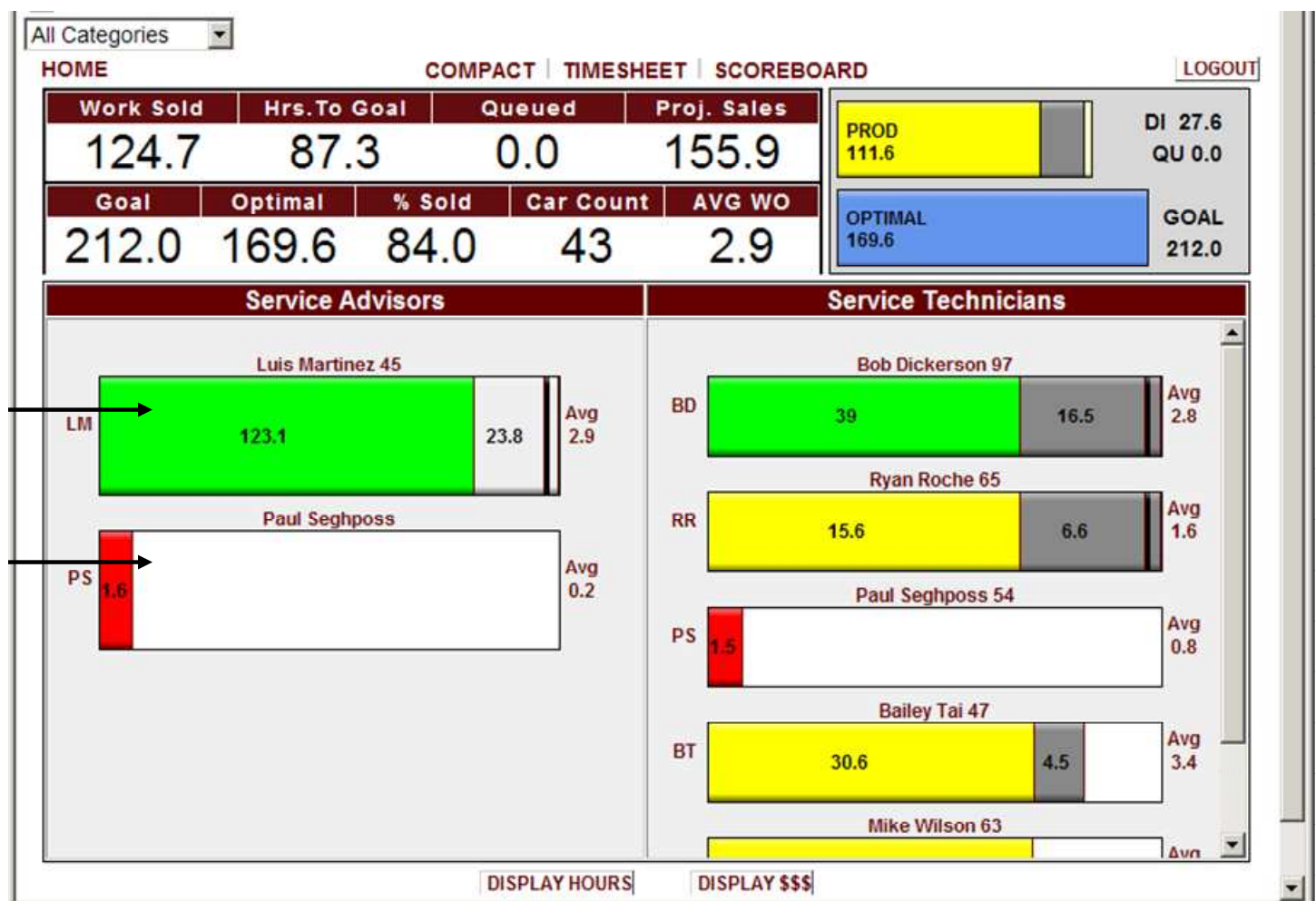
Create a New Work Order

- 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.




A login form with a white background and a dark border. It contains two input fields: 'USERNAME:' and 'PASSWORD:'. Below the fields is a 'LOGIN' button.


- 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

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:	<div> <div>6.9</div> <div>16.5</div> </div>	71%	4	5.8
B Tai 47:	<div> <div>3.6</div> <div>4.0</div> <div>8.5</div> </div>	79%	7	2.3
P Seghposs 54:	<div> <div>4.8</div> </div>	0%	0	0.0
M Wilson 63:	<div> <div>6.5</div> <div>1.5</div> <div>1.6</div> </div>	83%	2	4.0
R Roche 65:	<div> <div>2.3</div> <div>1.1</div> <div>6.1</div> </div>	70%	8	1.1

Search/New WO:



Work Sold	Hrs.To Goal	% Sold	Proj. Sales
123.1	46.5	83.8	153.9
Goal	Optimal	Declined	Car Count
169.6	135.7	23.8	43
AVG WO	2.9		

SOLD

123.1

23.8

OPTIMAL

135.7

GOAL

169.6

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Page 37 of 88

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).

HOME COMPACT TIMESHEET SCOREBOARD LOGOUT

WorkOrders

ALL WORK DISPATCHED

Dispatched WorkOrders

Sorted By: New Old

Active WOs

3788 - 2.0/0.0 hrs
4867 - 8.0 hrs
4870 - 1.0 hrs
4862 - 1.3 hrs
4865 - 3.0 hrs
4857 - 2.7 hrs
4848 - 1.5/0.0 hrs
4834 - 16.0 hrs
4793 - 11.0/0.0 hrs
4733 - 1.0 hrs

Search/New WO:

Work Order Number: newwo

[Create New Work Order] History:

W/O #: newwo E D Date A Event

Ad Code: Select Ad-Code ← A

Sold By: Luis Martinez 45 ← B

Category: Customer Pay ← C

Source: None Selected

Brand:

Tech Credited: Select Tech ← D

Sold Hours: ← E

Sold Dollars: ← F

Declined Hours:

Declined Dollars:

Create WO

[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

GOAL 197.2


SOLD 8.9 0.0

OPTIMAL 39.4

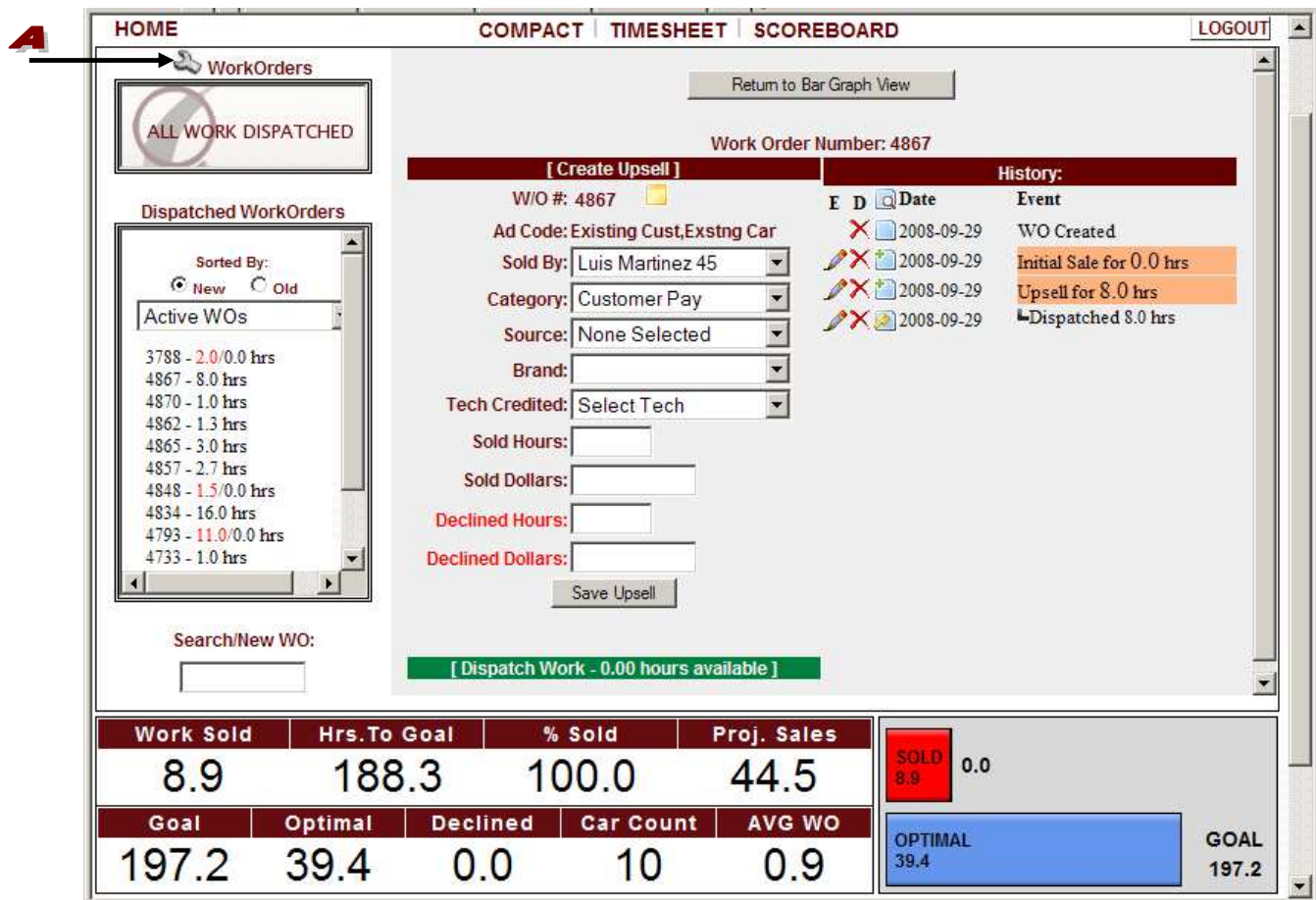
AVG WO 0.9

* 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]

W/O #: 4867

Ad Code: Existing Cust, Exstng Car

Sold By: Luis Martinez 45

Category: Customer Pay

Source: None Selected

Brand:

Tech Credited: Select Tech

Sold Hours:

Sold Dollars:

Declined Hours:

Declined Dollars:

Save Upsell

History:

Date	Event
2008-09-29	WO Created
2008-09-29	Initial Sale for 0.0 hrs
2008-09-29	Upsell for 8.0 hrs
2008-09-29	Dispatched 8.0 hrs

[Dispatch Work - 0.00 hours available]

Dispatched WorkOrders

Sorted By: New Old

Active WOs

- 3788 - 2.0/0.0 hrs
- 4867 - 8.0 hrs
- 4870 - 1.0 hrs
- 4862 - 1.3 hrs
- 4865 - 3.0 hrs
- 4857 - 2.7 hrs
- 4848 - 1.5/0.0 hrs
- 4834 - 16.0 hrs
- 4793 - 11.0/0.0 hrs
- 4733 - 1.0 hrs

Search/New WO:

Work Sold	Hrs. To Goal	% Sold	Proj. Sales
8.9	188.3	100.0	44.5

Goal	Optimal	Declined	Car Count	AVG WO
197.2	39.4	0.0	10	0.9

SOLD 8.9 0.0

OPTIMAL 39.4

GOAL 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.

WorkOrders

spg100 - 3.0 hrs
CATT01 - 2.0 hrs
si71 - 0.3 hrs

Dispatched WorkOrders

Sorted By:
☒ New ☐ Old

Active WOs

- 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
- bla3 - 3.0 hrs

Search/New WO:

[Create Upsell]

[Dispatch Work - 3.00 hours available]

Category	Technician	Hours
3.0 hrs Customer Pay	Select Tech	3.00

Dispatch Work

History:

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

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

SOLD 31.9 10.0

OPTIMAL 140.3

GOAL 144.0

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.

The screenshot displays the 'WorkOrders' interface. On the left, there are three sections: 'WorkOrders' (labeled **A**) showing a list of work orders like 'CATT01 - 2.0 hrs', 'Dispatched WorkOrders' (labeled **B**) showing a list of work orders sorted by 'New' or 'Old', and 'Search/New WO:' (labeled **C**) with a text input field. The main area is the 'Create Upsell' form, which includes fields for 'W/O #', 'Ad Code', 'Sold By' (dropdown), 'Category' (dropdown), 'Source' (dropdown), 'Brand' (dropdown), 'Tech Credited' (dropdown), 'Sold Hours' (input), 'Sold Dollars' (input), 'Declined Hours' (input), and 'Declined Dollars' (input). A 'History' table on the right shows events like 'WO Created' and 'Initial Sale for 3.0 hrs'. At the bottom, there are two summary tables and a bar chart.

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

Bar chart data: SOLD 31.9, 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 shows the 'WorkOrders' application interface. On the left, there's a 'WorkOrders' list with 'CATT01 - 2.0 hrs' selected. Below it is a 'Dispatched WorkOrders' list. The main area is the 'Create Upsell' form for W/O #: cj88. It includes fields for Ad Code, Sold By, Category, Source, Brand, Tech Credited, Sold Hours, Sold Dollars, Declined Hours, and Declined Dollars. A 'History' box on the right lists events from 2008-07-09 to 2008-07-14. A 'Service Information' box shows details for the 2008-07-14 event. At the bottom, a summary table displays sales and goal data.

Annotations:

- A**: Points to the 'Brand' dropdown menu.
- B**: Points to the 'History' box header.
- C**: Points to the 'Service Information' box.
- D**: Points to the 'Initial Sale for 2.0 hrs' event in the history list.

Summary Table:

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

Service Information:

Worked On: 2008-07-14 10:55:39
 Service Tech: Worthalot, Roger
 Produced Hours: 4.0 hrs.
 Non-Billable:

- 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.

Service Technician - Enter and Complete a Work Order

Note: It is important that immediately after completing a job, the technician enters it into the QuickTrac system to allow real time tracking of numbers.

- 1) To open QuickTrac double click on the QuickTrac icon. Or type www.quicktracsw.com in the web address field in your browser.



- 2) Next, click on the LOGIN link at the top of the page.



September 3, 2008

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CARS
2007 leading To
The next level

Listen To Industry Experts
YOUR SOURCE FOR INSIDE
AUTOMOTIVE INFORMATION

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](#)

Lenny Autoworks		
PRODUCED	PROJECTED	OPTIMAL
143.2	144.3	238.0
SALES	GOAL	Achieved
163.7	240	2.6
HOME		

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.

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Tony & Darcy Blazek Blazek Diagnostics

Nate Smith Nate Smith's Optimal Auto

Rami Derhy Signal Garage

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"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

Enter and Complete a Work Order

- 3) Enter your Shop's USER NAME and PASSWORD:



Connect to www.quicktracsw.com


The server www.quicktracsw.com at QuickTrac.Biz requires a username and password.

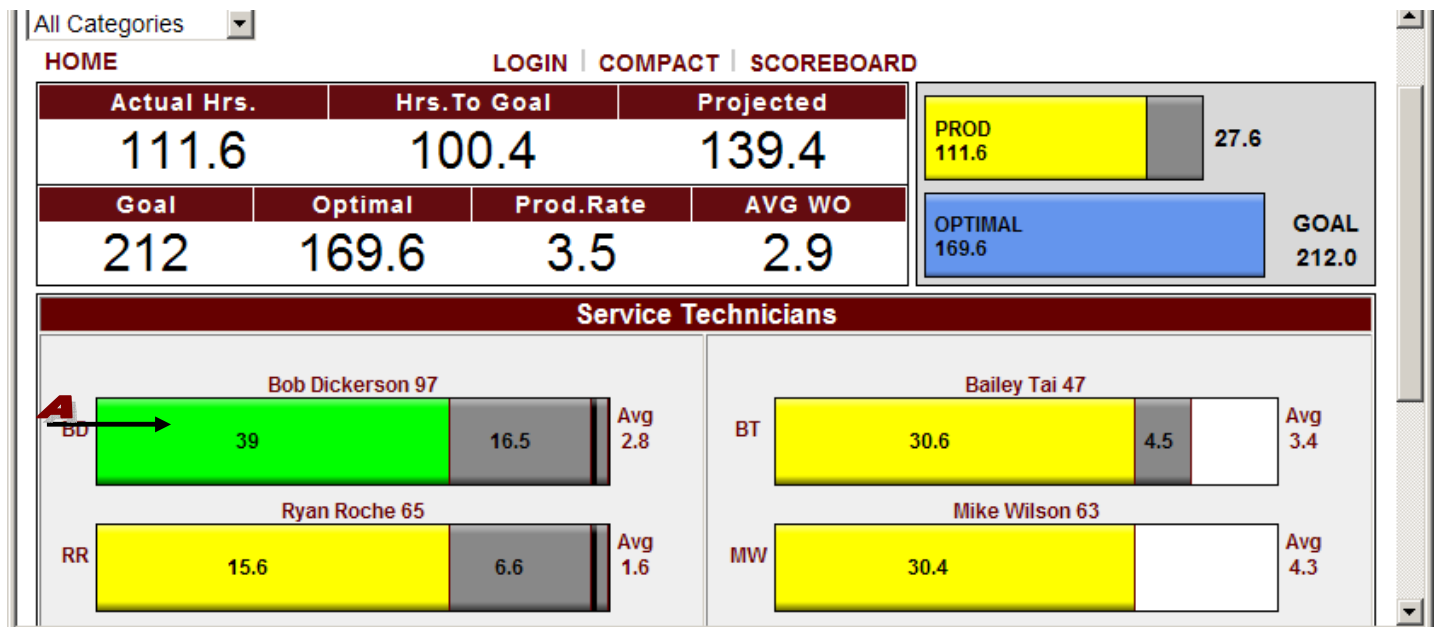
User name:

Password:

☐ Remember my password

OK Cancel

- 4) Click on the  TECHNICIAN BAR GRAPH for the specific Service Technician that will be entering produced time or completing a work order.



Enter and Complete a Work Order

- 5) To enter produced time or to complete a work order, click on the work order you want from the **A** AVAILABLE WORK BOX on the left hand side or enter the **B** WO NUMBER in the SEARCH box and click on the **C** SEARCH button. Each dispatch time will show the category color code (mouse over colored dispatch time box for category display). For each dispatch, enter the time produced and then click on the DONE button. If all work is completed for that work order, make sure time produced is entered and then click in the MARK WO COMPLETE checkbox. Finally, click on the DONE button to confirm entries.

The first **D** CHECK ALL BOX at the top enters and logs all time as being produced for all dispatches. The CHECK box for each dispatch marks all time produced for each individual dispatch.

AVAILABLE WORK

- 3.0 Hrs. - cj340
- 3.0 Hrs. - blabla
- 3.0 Hrs. - blabla2
- 2.0 Hrs. - bla3
- 5.0 Hrs. - 252608

SEARCH

WO NUMBER

SEARCH

EDIT WO

WO NUM: 252608

Dispatched: 5.0 Produced: 0.0

Disp: Available: Check All ☐

3.0 3.0 / 3.0 ☐

2.0 2.0 / 2.0 ☐

Mark WO Complete ☐

CANCEL DONE

WORK WEEK HISTORY

HRS	Sunday	%
0.0	10.0	0%
0.0	10.0	0%
0.0	10.0	0%
0.0	10.0	0%
0.0	10.0	0%
0.0	10.0	0%
0.0	10.0	0%

Summary Table

Actual Hrs.	Hrs. to Goal	Projected
0.0	50.0	0.0
Goal	Optimal	Prod. Rate
50.0	29.5	0.0

PROD 0.0 16.0

OPTIMAL 29.5 **GOAL 50.0**

- 6) Click the **E** triangle to see work history against the dispatch record. The work history allows you to EDIT or DELETE the hours you entered, if necessary. Technician's daily production time is color-coded on the right under the WORK WEEK HISTORY BOX.

AVAILABLE WORK

- 3.0 Hrs. - cj340
- 3.0 Hrs. - blabla
- 3.0 Hrs. - blabla2
- 2.0 Hrs. - bla3
- 2.0 Hrs. - 252608

SEARCH

WO NUMBER

SEARCH

EDIT WO

WO NUM: 252608

Dispatched: 5.0 Produced: 3.0

Disp: Available: Check All ☐

2.0 2.0 / 2.0 ☐

3.0 0.0 / 0.0 ☐

9/3/08 3.0

Mark WO Complete ☐

CANCEL DONE

WORK WEEK HISTORY

HRS	Sunday	%
0.0	10.0	0%
0.0	10.0	0%
0.0	10.0	0%
3.0	7.0	30%
0.0	10.0	0%
0.0	10.0	0%
0.0	10.0	0%

Summary Table

Actual Hrs.	Hrs. to Goal	Projected
0.0	50.0	0.0
Goal	Optimal	Prod. Rate
50.0	29.5	0.0

PROD 0.0 16.0

OPTIMAL 29.5 **GOAL 50.0**

Service Advisor Main Page

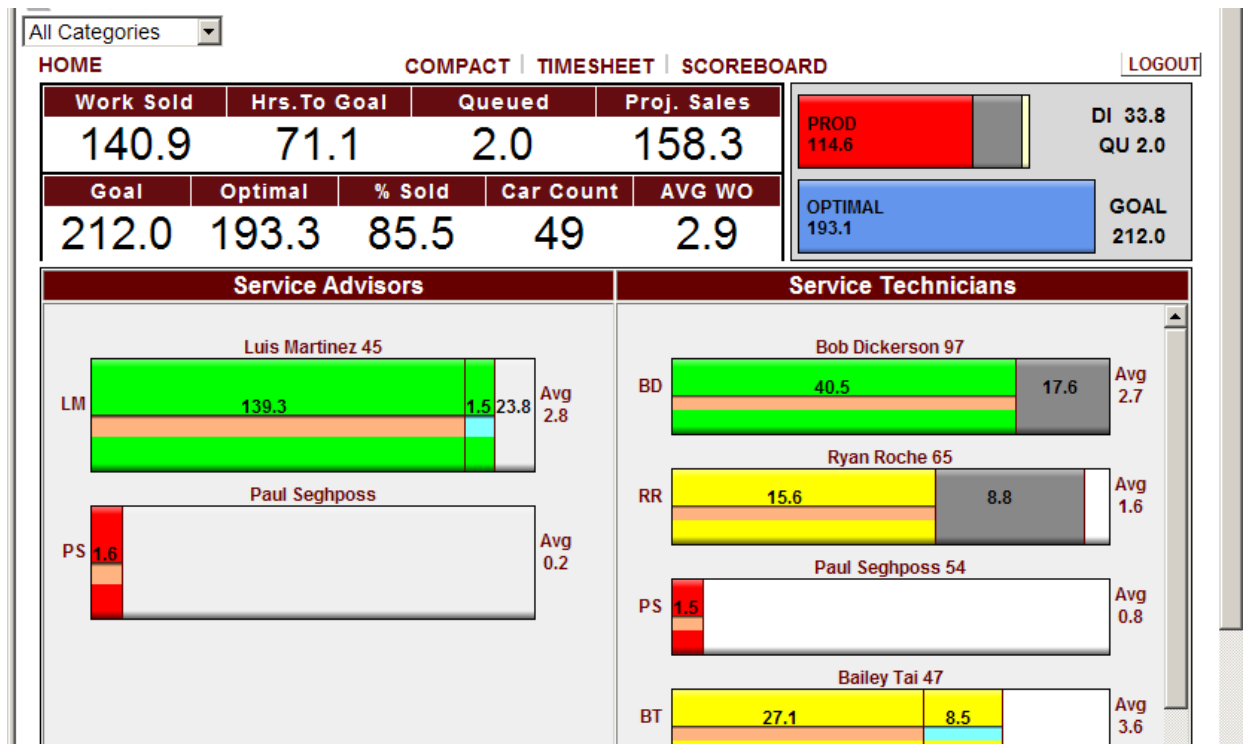
All figures shown are for a business week

First log into your shop's account and then log in as a Service Advisor to view the Service Advisor Main Page. The Service Advisor Main Page shows Shop, Service Technicians, and Service Advisors, performance all at a glance. **Note:** The Service Advisor screen displays the Traditional View by default. For purposes of describing the Category View, the Category View is shown below. The view option is available via the OPTIONS menu.

On the menu, you will see the following links. The HOME link on the left hand side is the Service Advisor Main Page which you are currently viewing. The COMPACT link compresses the display and moves it to the upper right hand corner of your monitor for fast reopening and entry of future work orders. It continuously displays the company's progress towards goals. While in compact view you will see Actual, Projected, Optimal, Sold, Goal, and AVG/WO (average hours produced per WO) hours. And the SCOREBOARD link displays the team's performance that automatically changes based on the scores of the individuals.

At the bottom of the page there are two links, the DISPLAY HOURS and DISPLAY \$\$\$ links at the bottom of the page. DISPLAY HOURS will display all data in hours. To switch the display and show the data in dollars, click on DISPLAY \$\$\$.

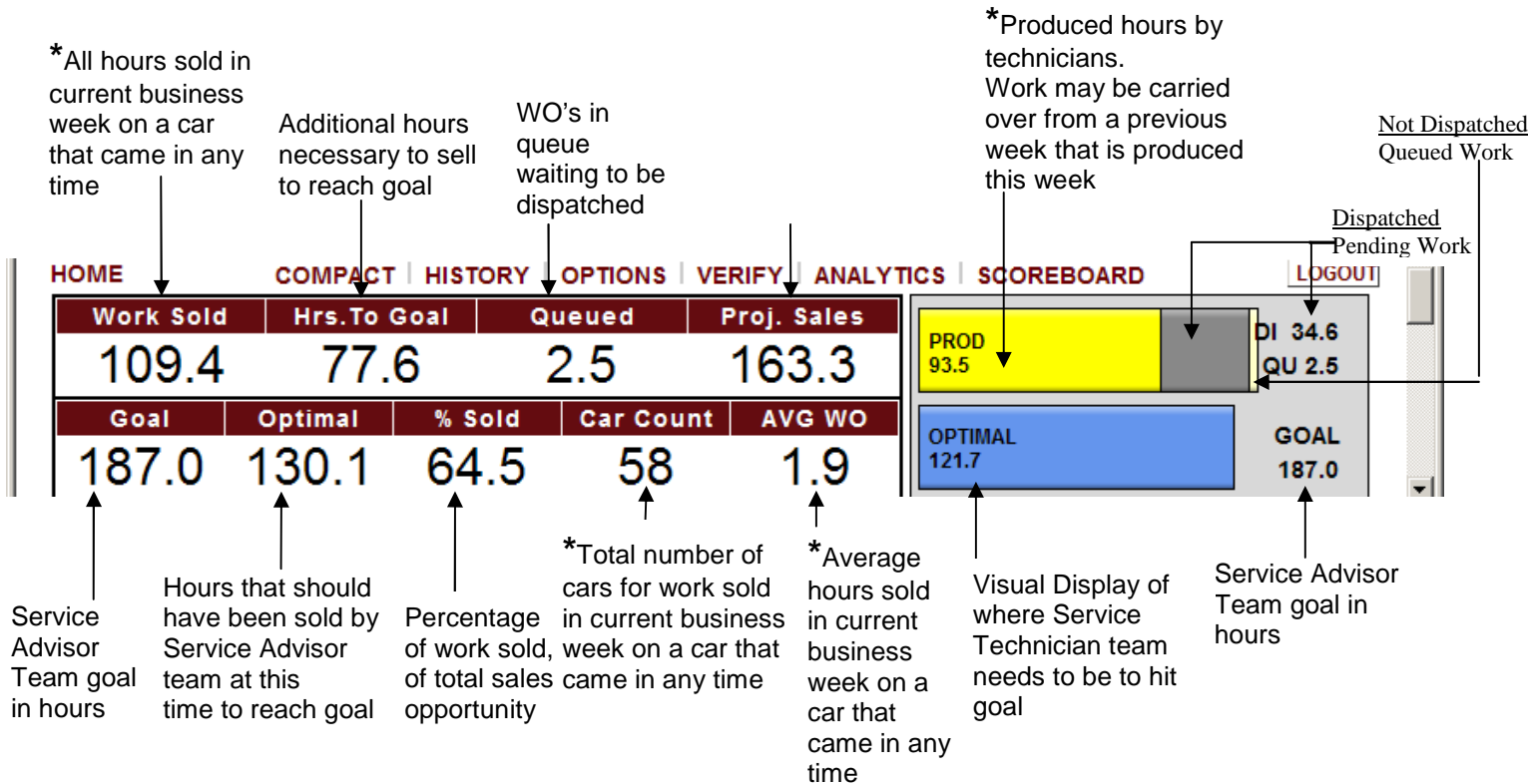
QuickTrac default is to display the traditional view and hours.



Service Advisor Main Page

All figures shown are for a business week

*** Note:** Categories will only be included in the Work Sold box and the Produced Bar Graph ONLY IF the “Counts to Goal” option is check marked in the Edit Source Name field under the Work Codes link in OPTIONS.



*The “Car Count” box shows the number of cars for work sold in current business week on a car that came in any time. Mousing-over shows the count of cars that have had work sold in the current business week for cars that came in this week only.

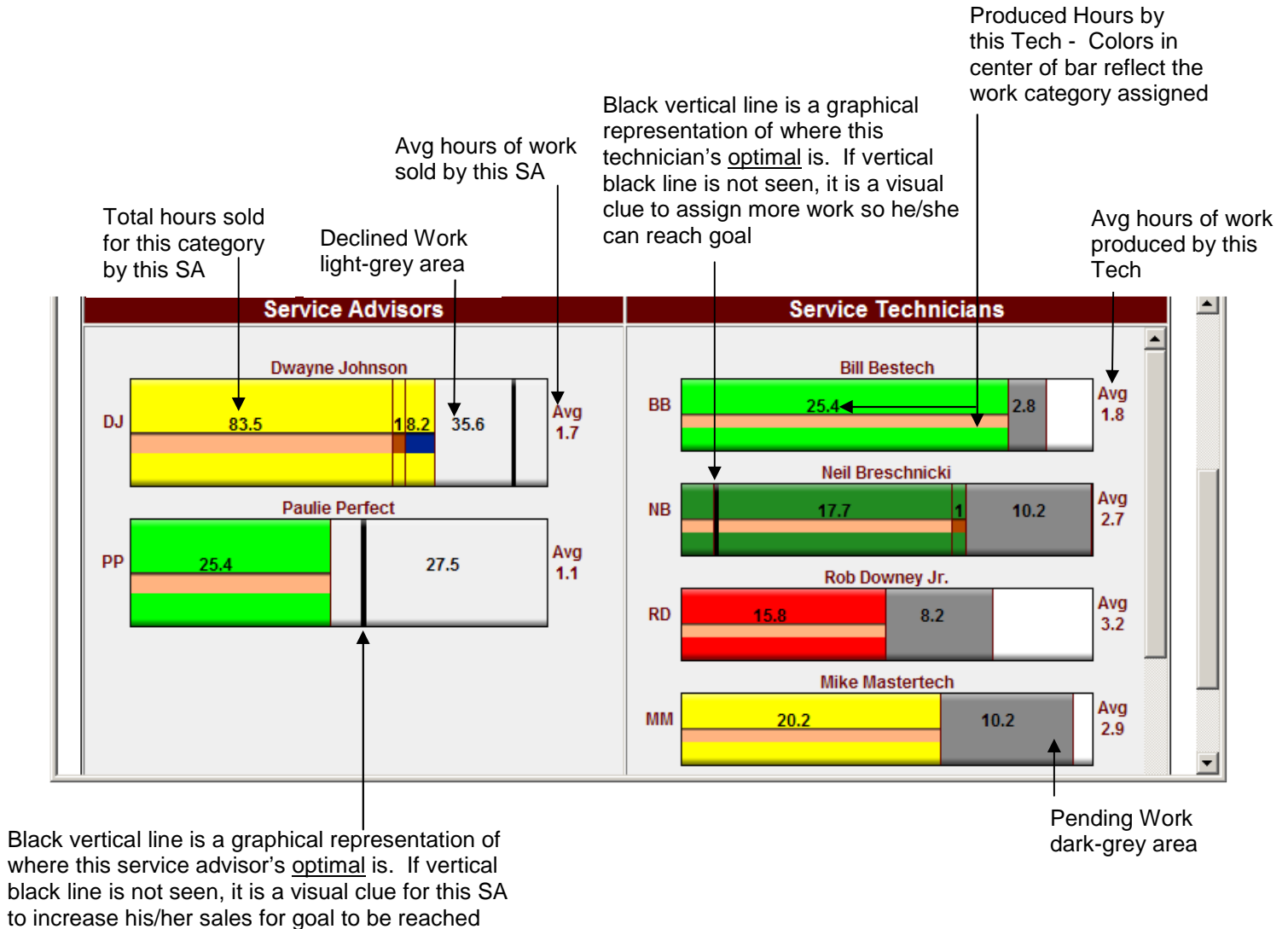
Note: If you do not want to see an additional car count added in a current business week for a car count that was used for a previous business week (for work sold in a current business week & previous business week), you will need to mouse over the Car Count box.

*The “AVG/WO” box shows the average work sold in current business week on a car that came in any time. Mousing-over shows the average work order with work sold in the current business week for cars that came in current business week only.

*The “Work Sold” box shows the total hours sold in current business week on a car that came in any time. Mousing-over shows the hours sold on cars which came in the current business week only.

Service Advisor Main Page

All figures shown are for a business week



Note: Mousing over any of the numbers shown on bar graph will display a pop up box with details

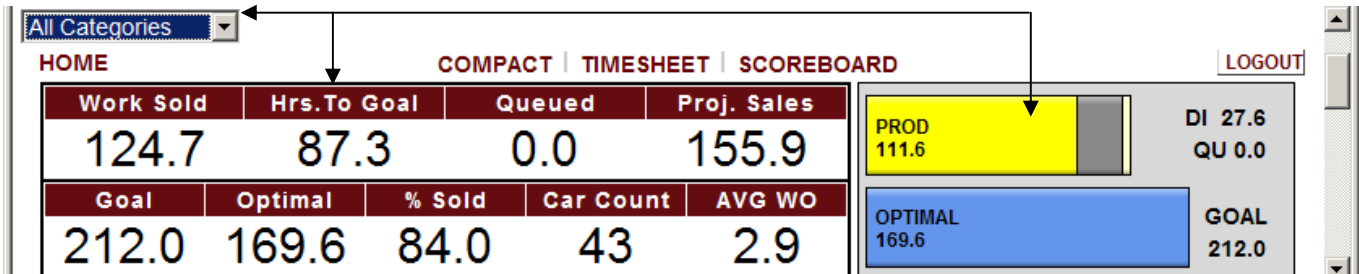
Note: Employees that do not show a vertical black line is because their optimal goal has not been met yet. Once employee reaches their optimal goal, their vertical black line will appear at the right hand side and move to the left as he increases past his optimal goal.

Note: Each of your employee's bar graph is not relative to each other.

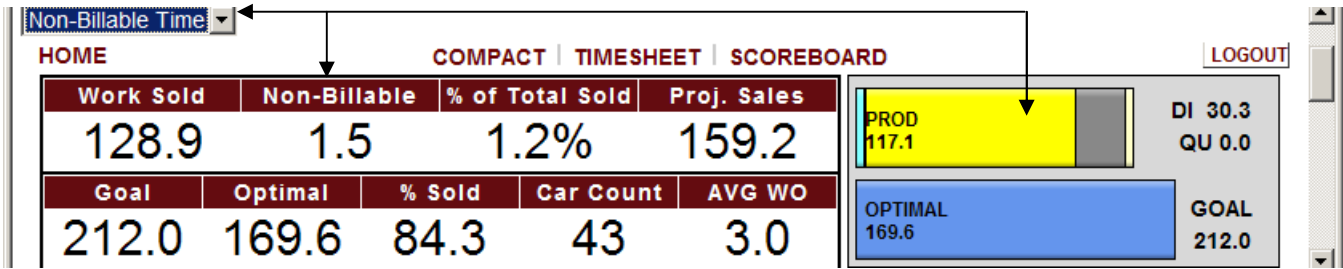
Service Advisor Main Page

All figures shown are for a business week

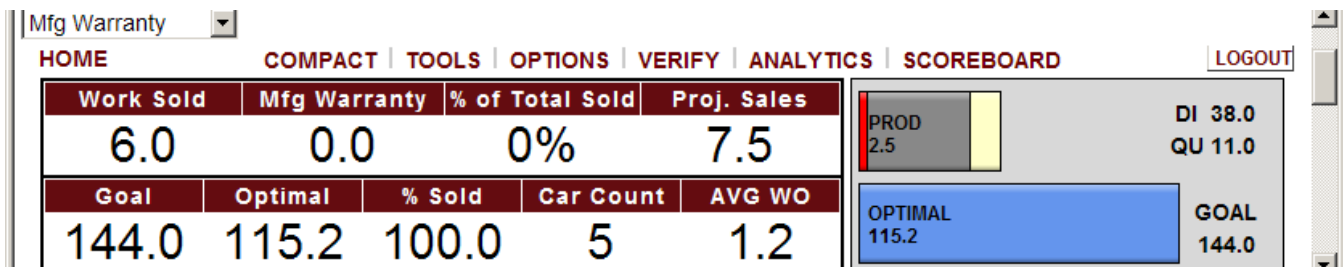
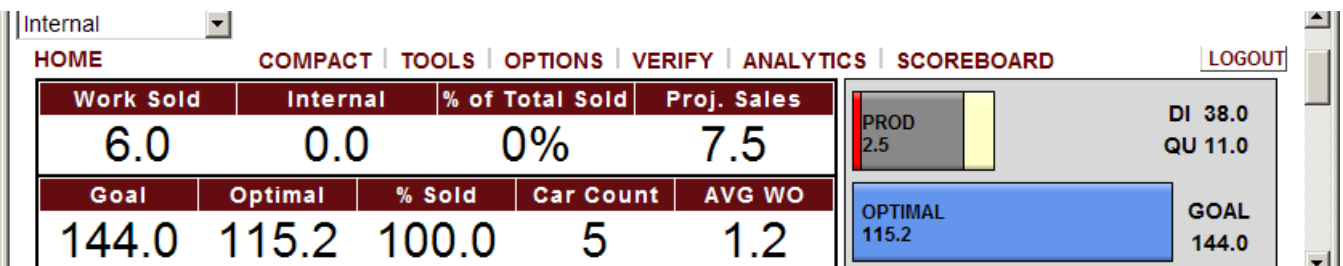
Note: Categories will only be included in the Work Sold box and the Produced Bar Graph if the “Counts to Goal” option is check marked in the Edit Source Name field under the Work Codes link in OPTIONS.



When a different category is selected from the drop-down box, the category amount is displayed and the color coded category is reflected in the bar graph (See Work Codes document for color category codes.)



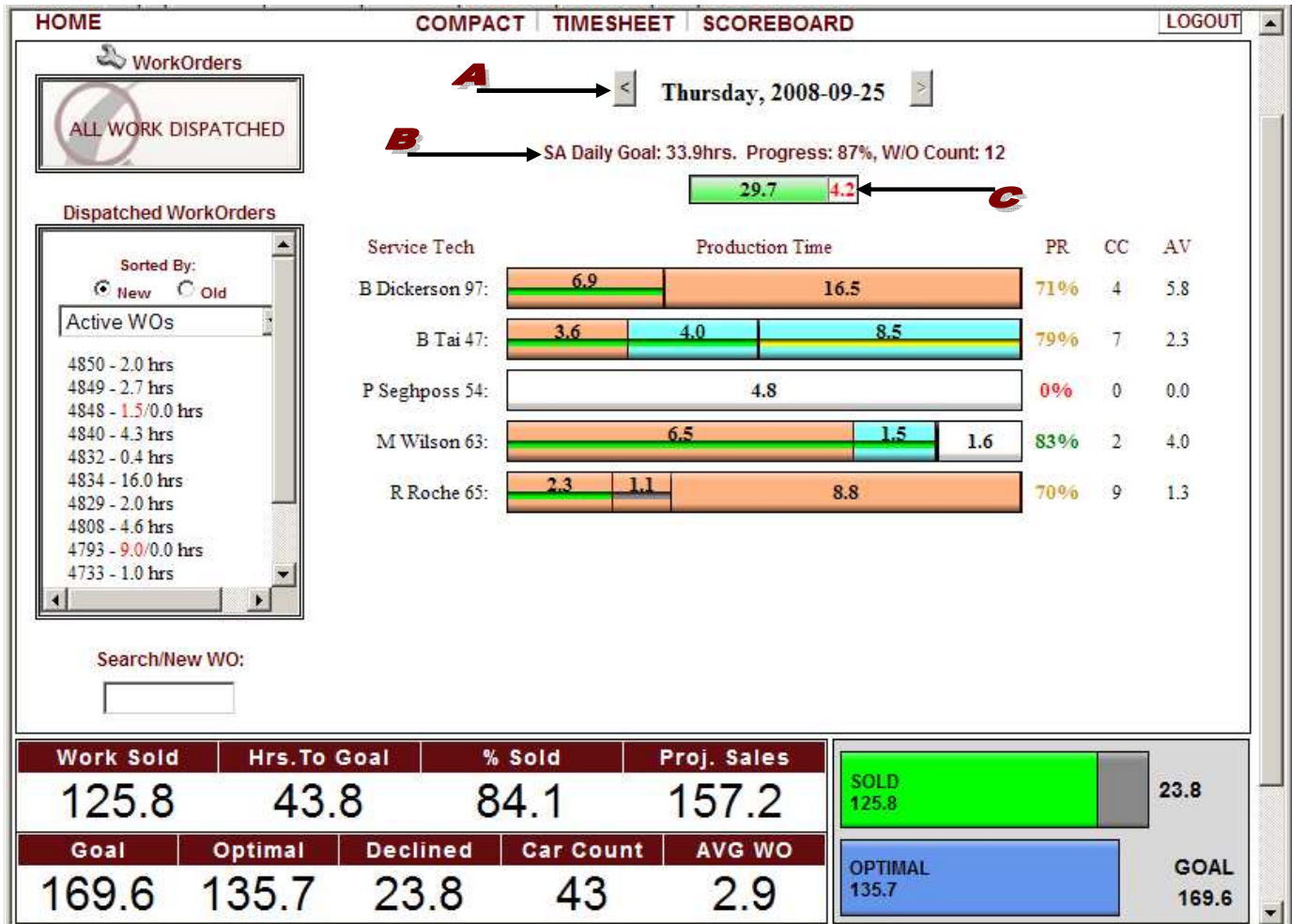
The Internal and Mfg Warranty Categories shown below are created for all shops. However, they are only active for Dealerships. Categories can be activated or inactivated in the Work Codes link. A maximum of twelve Work Categories can be created. Two unlimited sub-categories are allowed under Work Categories.



Service Advisor Personal Page

All figures shown are for a business week

The following is seen at a glance once logged in the Service Advisor's Personal Page.



A The arrows to the left and right of the date allow you to scroll to view completed work on any day of that work week. The current work day will display in bold.

Displayed below the date are the **B** SERVICE ADVISORS DAILY GOAL HOURS, PROGRESS PERCENTAGE, WORK ORDER COUNT, and a **C** GRAPHICAL COLOR CODED BAR GRAPH. The left side of this bar graph shows how many hours the Service Advisor has sold. The right side of the bar graph shows the hours the Service Advisor has left to sell to meet their goal. RED is a warning sign and shows if sales are below 60% relative to their goal. YELLOW represents that sales is questionable and shows if sales is at 60% to 80% relative to goal. GREEN shows if sales are at 80% to 100% to goal. And DARK GREEN shows if sales are over 100%.

Service Advisor Personal Page

All figures shown are for a business week

QuickTrac provides a daily view (SIMPLE VIEW OR CATEGORY VIEW - SEE SHOP OPTIONS) of all service technicians at a glance. The simple view displays by default. For purposes of this document the category view is shown.

The daily bar graph for each service technician contains a **D** SEPARATOR BAR. To the LEFT of the SEPARATOR BAR is the **E** SERVICE TECHNICIAN'S PRODUCTION TIME which is color coded as follows. GREEN represents production time and GREY represents verified time.

To the RIGHT of the SEPARATOR BAR is **F** TIME ASSIGNED AND NOT PRODUCED yet which is color coded as follows. WHITE represents available time for that day. YELLOW represents aged work orders that have been dispatched for more than two days but not completed. And GREY represents verified time.

New shops are given four base categories (two of these categories are set to an inactive status for shops but are active for dealerships) and have the following default color assignments. Note that the medium value is chosen for each color:

Customer Pay (Pastel Orange)

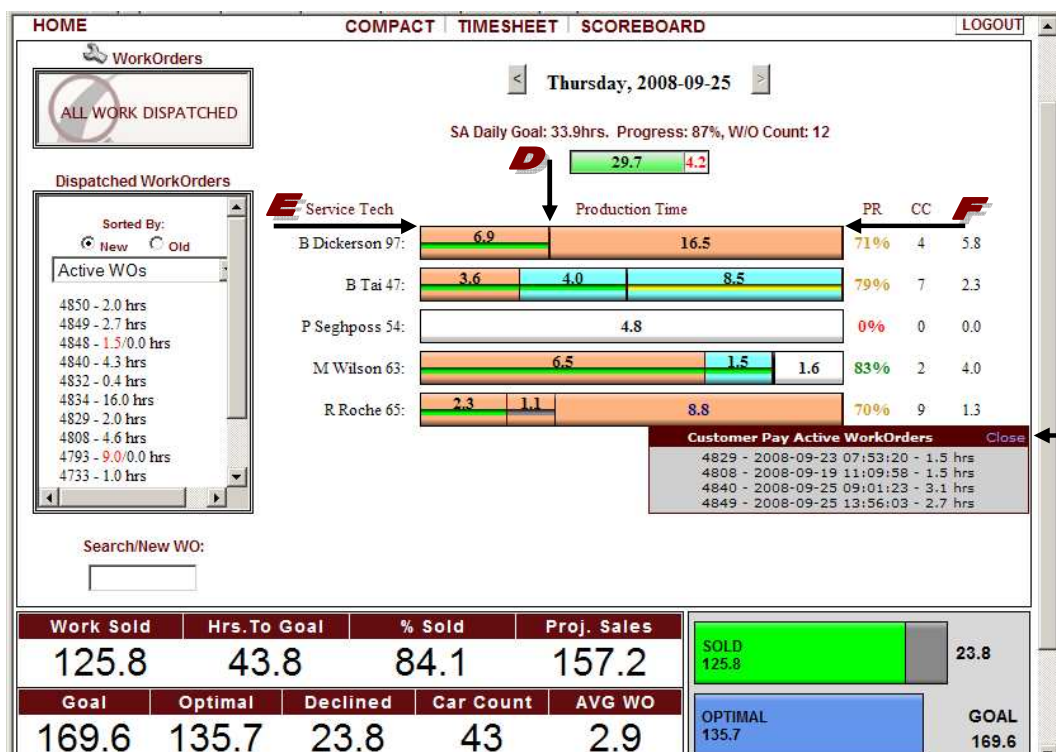
Non-Billable (Teal)

Internal (Blue) – active for dealerships

Mfg Warranty (Purple) – active for dealerships

Shops, Dealership Owners, and Managers are, of course, free to activate or inactivate categories or to re-assign colors under the WORK CODES link. The maximum categories that can be created are 12.

Scroll over any area of the service technician bar with your mouse to view the **C** WORK ORDERS CATEGORY dialogue box. The work order numbers for each category will display.



Service Advisor Personal Page

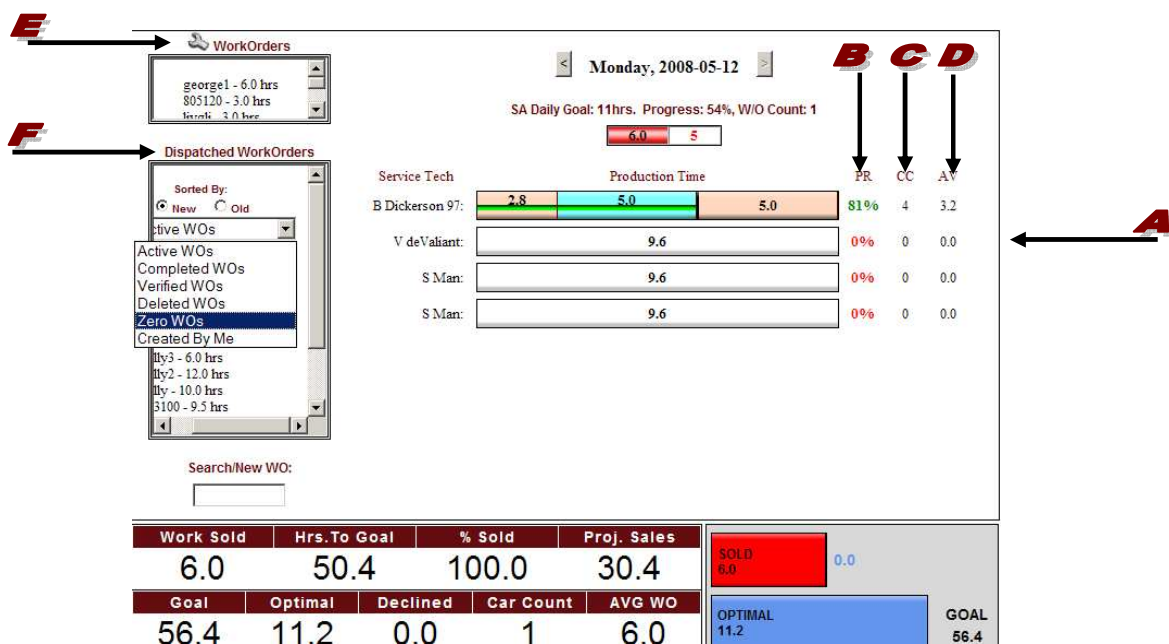
All figures shown are for a business week

To the right of the Production Time Graph there is the **A** PR/CC/AV column. This column provides the productivity rate, car count, and average hours per work order. The **B** productivity rate will provide a percentage of how much work each service technician has completed at that point in time to meet their goal for the day. The color code for the productivity rate is as follows: RED is a warning sign and shows if productivity is below 60% relative to their goal. YELLOW is questionable and shows if productivity is at 60% to 80% relative to goal. GREEN SHOWS if productivity is at 80% to 100% to goal. And DARK GREEN shows if productivity is over 100%. The **C** CAR COUNT shows how many cars have come through the shop that day. The **D** AVERAGE shows the average hours they are producing per work order.

To the left of the page there are three boxes. Starting from the top is the **E** WORK ORDERS box. This box is to remind the service advisor that a technician needs to be assigned to these work orders. Any work order time highlighted in Red is work that contains non-billable time.

Below the WORK ORDERS box, there is the **F** DISPATCHED WORK ORDERS box. The work orders that appear in this box are sorted by their creation date. They can be sorted by either "New" or "Old". When "New" is selected, the most recently created work orders appear at the top of the box, the oldest at the bottom. When "Old" is selected the oldest created work orders appear at the top of the box, and the newest at the bottom. Any work order time highlighted in RED is work that contains non-billable time.

In the dispatched work orders drop down box, you can select ACTIVE, COMPLETED, VERIFIED, DELETED ZERO OR CREATED BY ME WORK ORDERS. ACTIVE WO's display all work orders that still need to be worked on. COMPLETED WO's displays all work orders that have been completed for the current week. VERIFIED WO's displays work orders that have been verified for the current week. DELETED displays current week work orders that have been deleted for the current week. Zero WO's displays work order that were created with Zero hours for the current week. And lastly, CREATED BY ME, displays all work orders created by the Service Advisor who is logged in on his/her own personal page.

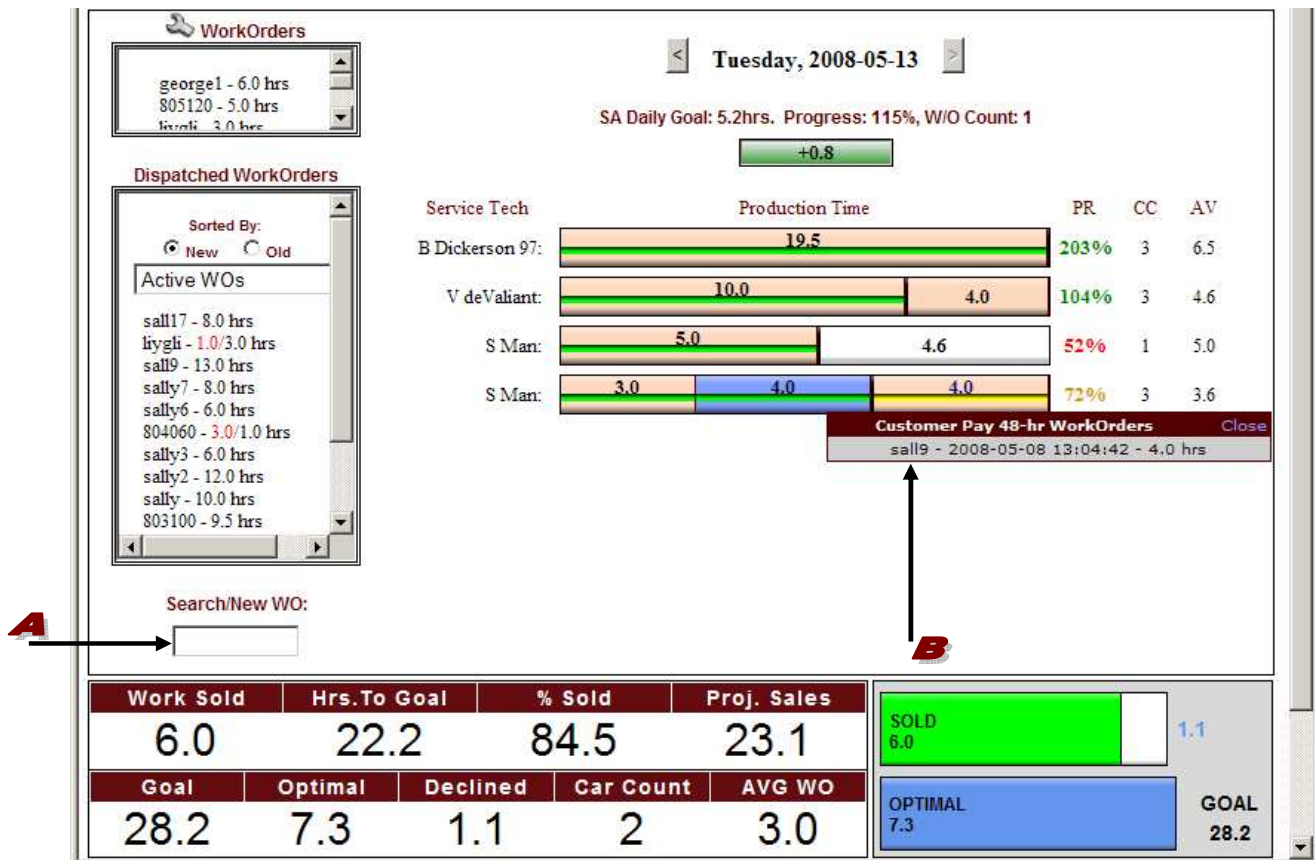


Service Advisor Personal Page

All figures shown are for a business week

The third box on the left hand side is the **A** SEARCH/NEW WO box. Work orders can be searched for or created in this field by typing in the work order number and hitting the enter button on your keyboard.

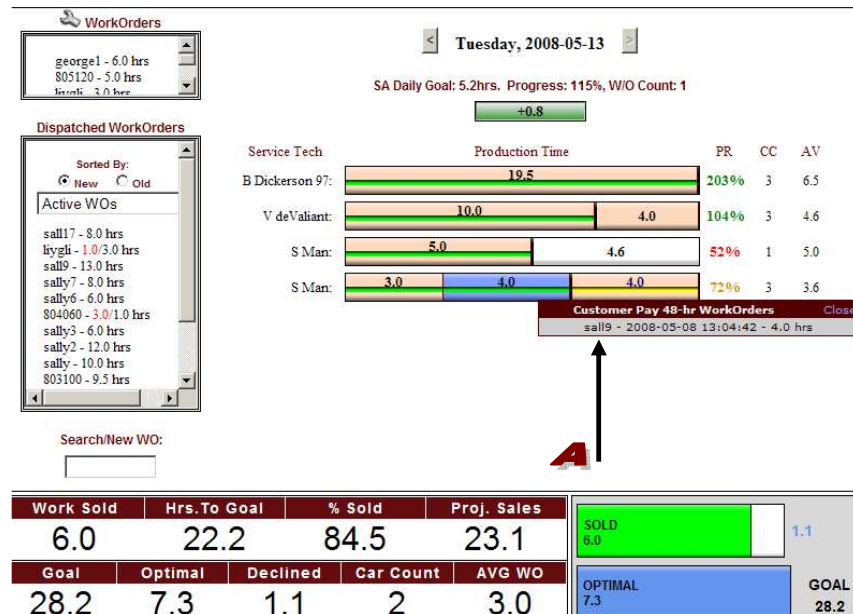
Scroll over any area of the service technician bar with your mouse to view the **B** CATEGORY WORK ORDERS LIST dialogue box. It will show work order details for that technician. Each color code on the left and right of the bar graph has its own work orders list dialogue box. The date and hours assigned are included. A line through the work order number represents that the work order has been completed. Click on a work order number to EDIT or scroll over "CLOSE" to close the dialog box.



Service Advisor Personal Page

All figures shown are for a business week

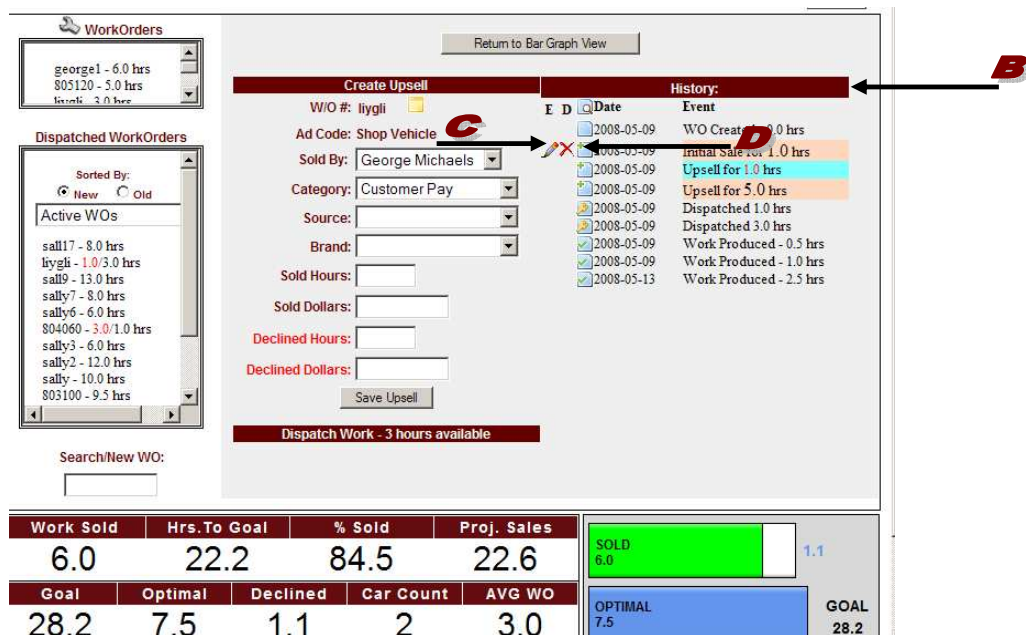
If you click on a **A** work order number you will be able to view or edit it.



The **B** HISTORY box shown below displays all entries and contains the EDIT, DELETE, KEY, DATE, and EVENT columns. A **C** PEN in the E column allows you to edit an event. A **D** RED X in the D column allows you to delete an entry.


Note: You cannot edit or delete any upsell if work has been dispatched. In addition, you cannot edit or delete any dispatch if work has been produced. Work produced will need to be deleted by the technician in order for the upsell or dispatch record to be edited.

In addition, the initial work order entry cannot be edited by the Service Advisor. It is important to know how many work orders start out at one price and are later downsized. Only a Manager/Owner login account has access to edit the original entry.



Service Advisor Personal Page

All figures shown are for a business week

If you scroll over the  MAGNIFYING GLASS icon you will see the ICON KEY dialogue box. Scroll over any icon in this column. Each icon has its own dialogue box with detailed information about that particular event.

WorkOrders

george1 - 6.0 hrs
805120 - 5.0 hrs
lucy1 - 2.0 hrs

Dispatched WorkOrders

Sorted By:
☒ New ☐ Old

Active WOs

sall17 - 8.0 hrs
liygli - 1.0/3.0 hrs
sall9 - 13.0 hrs
sally7 - 8.0 hrs
sally6 - 6.0 hrs
804060 - 3.0/1.0 hrs
sally3 - 6.0 hrs
sally2 - 12.0 hrs
sally - 10.0 hrs
803100 - 9.5 hrs

Search/New WO:

Return to Bar Graph View

Create Upsell

W/O #: liygli

Ad Code: Shop Vehicle

Sold By: George Michaels

Category: Customer Pay

Source:

Brand:

Sold Hours:

Sold Dollars:

Declined Hours:

Declined Dollars:

Save Upsell

Dispatch Work - 3 hours available

Icon and Color Key

- New Work Order

- Edited Work Order

- Upsell Record Created

- Assigned Work to Tech

- Tech Recorded Work

- Tech Work Completed

- All Work Completed

- Work Order Verified

2008-05-13 Work Produced - 2.5 hrs

Work Sold	Hrs.To Goal	% Sold	Proj. Sales
6.0	22.2	84.5	22.6
Goal	Optimal	Declined	Car Count
28.2	7.5	1.1	2
AVG WO 3.0			

SOLD 6.0

1.1

OPTIMAL 7.5

GOAL 28.2

The  EVENT column will inform you of the type and time of each entry for that work order.

WorkOrders

george1 - 6.0 hrs
805120 - 5.0 hrs
lucy1 - 2.0 hrs

Dispatched WorkOrders

Sorted By:
☒ New ☐ Old

Active WOs

sall17 - 8.0 hrs
liygli - 1.0/3.0 hrs
sall9 - 13.0 hrs
sally7 - 8.0 hrs
sally6 - 6.0 hrs
804060 - 3.0/1.0 hrs
sally3 - 6.0 hrs
sally2 - 12.0 hrs
sally - 10.0 hrs
803100 - 9.5 hrs

Search/New WO:

Return to Bar Graph View

Create Upsell

W/O #: liygli

Ad Code: Shop Vehicle

Sold By: George Michaels

Category: Customer Pay

Source:

Brand:

Sold Hours:

Sold Dollars:

Declined Hours:

Declined Dollars:

Save Upsell

Dispatch Work - 3 hours available

History:

E D Q Date

2008-05-09 WO Created - 0.0 hrs

2008-05-09 Initial Sale for 1.0 hrs

2008-05-09 Upsell for 1.0 hrs

2008-05-09 Upsell for 5.0 hrs

2008-05-09 Dispatched 1.0 hrs

2008-05-09 Dispatched 3.0 hrs

2008-05-09 Work Produced - 0.5 hrs

2008-05-09 Work Produced - 1.0 hrs

2008-05-13 Work Produced - 2.5 hrs

Work Sold	Hrs.To Goal	% Sold	Proj. Sales
6.0	22.2	84.5	22.6
Goal	Optimal	Declined	Car Count
28.2	7.5	1.1	2
AVG WO 3.0			

SOLD 6.0

1.1

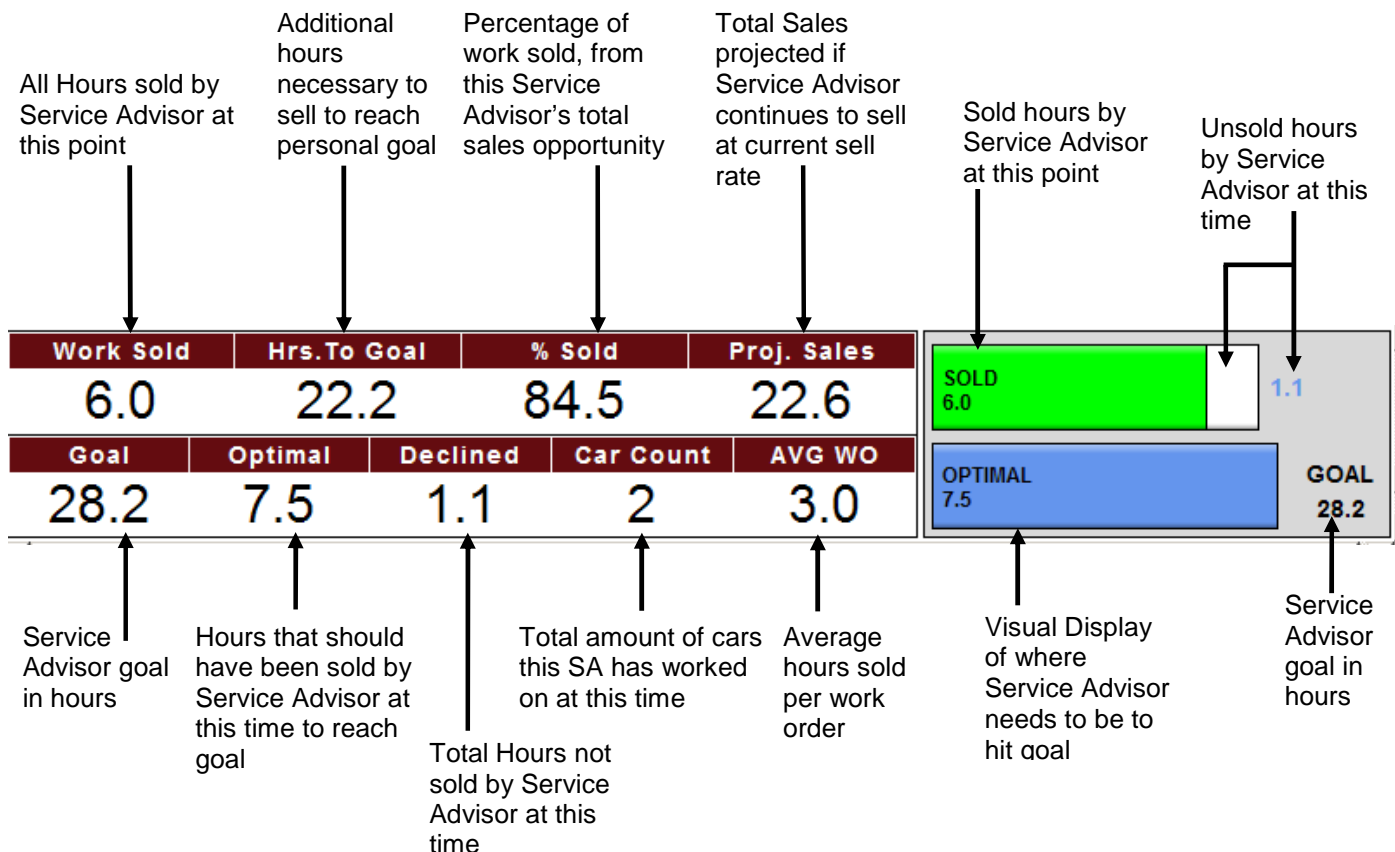
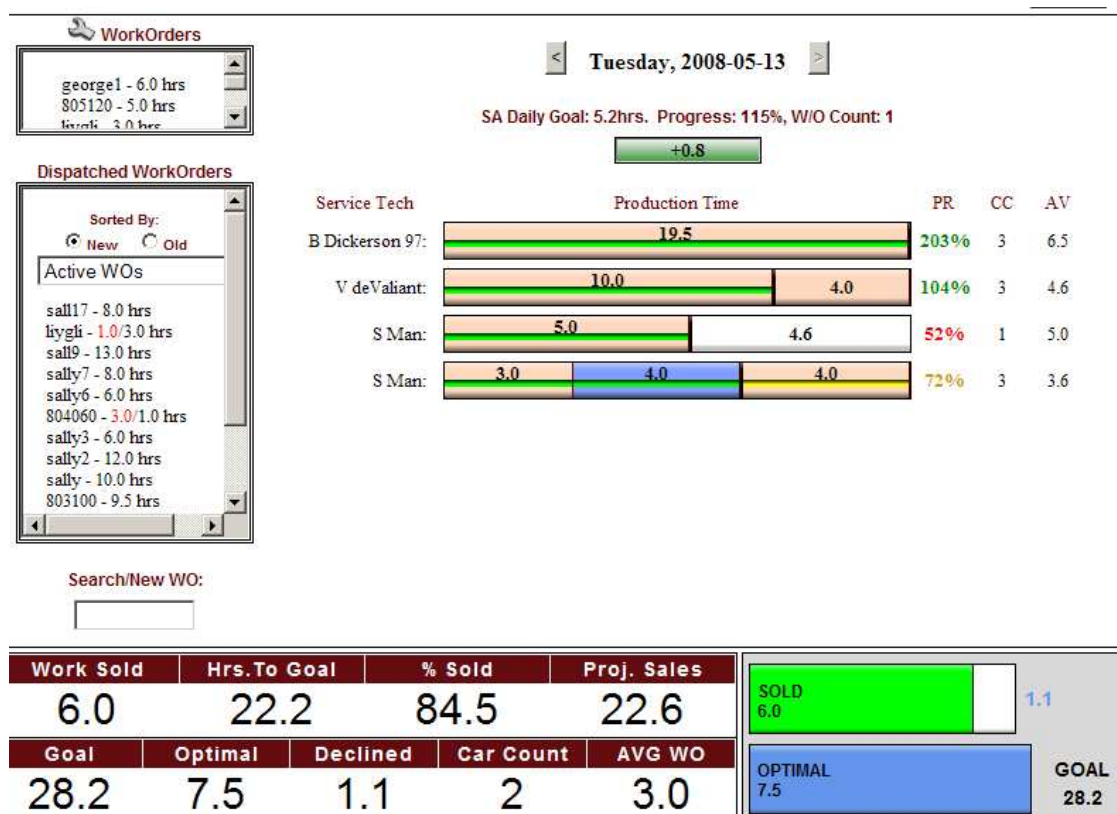
OPTIMAL 7.5

GOAL 28.2

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.

Service Advisor Personal Page

All figures shown are for a business week

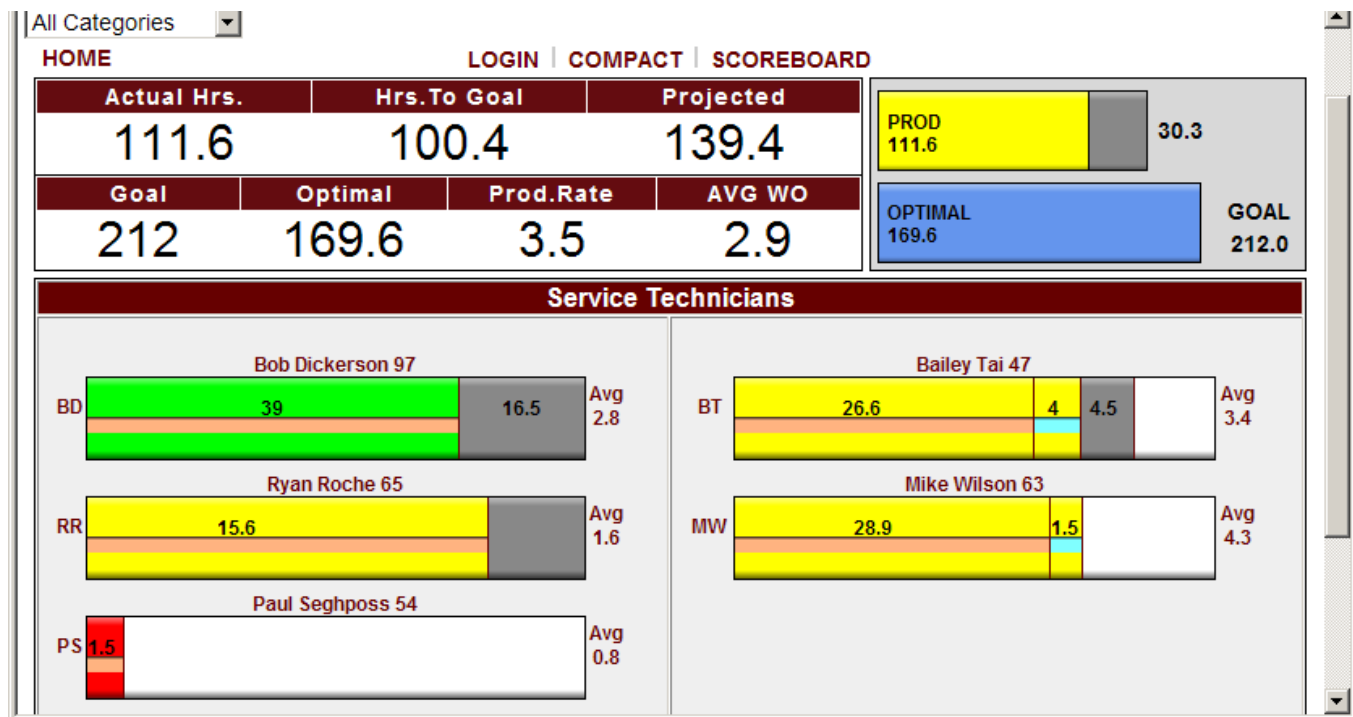


Service Technician Main Page

All figures shown are for a business week

Once you log into your shop's account you will see the Service Technician's Main Page. This page includes information on how the technicians are performing towards the team goal as well as how each technician is performing towards their own goals. This page also shows the display with the color-coded Category View turned on via the **OPTIONS > SHOP** menu. By default, it is turned off.

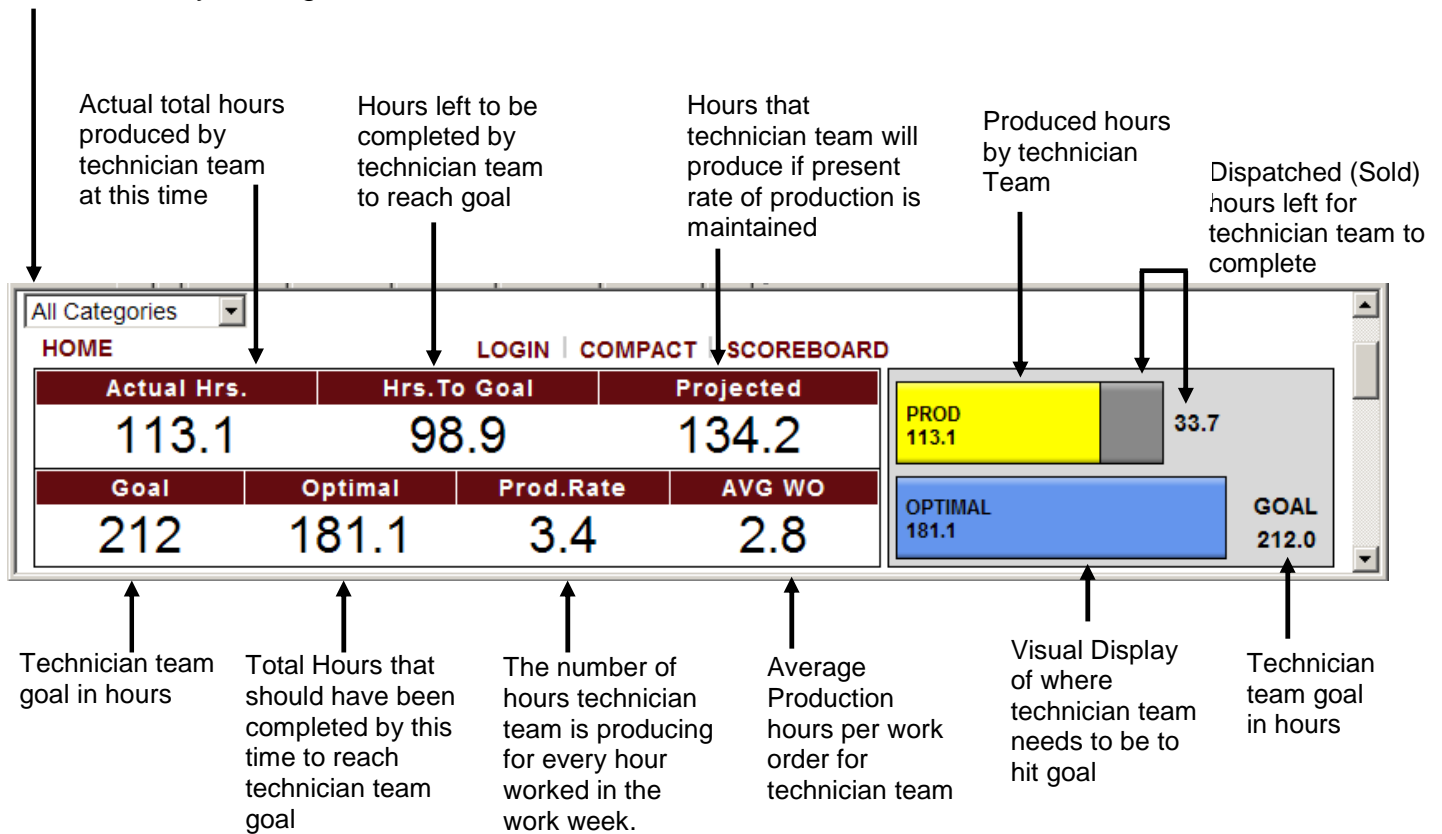
On the menu, you will see the following links. The **HOME** link on the left hand side is the Technician's main page which you are currently viewing. The **LOGIN** link allows a Service Advisor, Owner, or Manager, to log in with their personal login and password to view the Service Advisor main page. The **COMPACT** link compresses the display and moves it to the upper right corner of your monitor for fast reopening and entry of future work orders. It continuously displays the company's progress towards Shop's goals. The **COMPACT VIEW** provides the actual, projected, optimal, sold, goal, and avg/wo hours (average production hours). And the **SCOREBOARD** link displays the team's performance that automatically changes based on the scores of the individuals.



Service Technicians Main Page

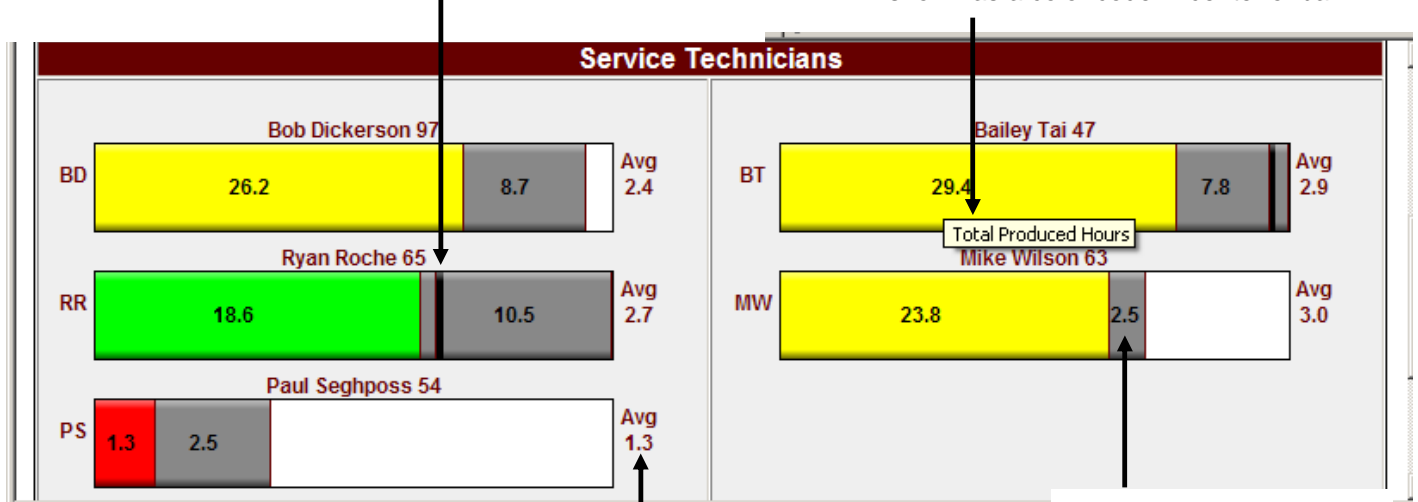
All figures shown are for a business week

*** Note:** Categories will be included in the Actual Hrs. box and the Produced Bar Graph ONLY IF the "Counts to Goal" option is check marked in the Edit Source Name field under the Work Codes link in OPTIONS. Only Managers and Owners have access to the Work Codes link.



Black vertical line is a graphical representation of where this technician's optimal is. If vertical black line is not seen, it is a visual clue to assign more work so technician can reach goal

Mouse over a technician's bar graph to see the work code dialogue box of time produced or dispatched. Work Codes are shown as a color code in center of bar.



Average hours by this technician
Note: One work order can be worked on by two different technicians. Individual averages are calculated differently than the team AVG/WO

Dark Grey Area - Dispatched hours left for this technician to work on

Service Technician Personal Page

All figures shown are for a business week

The Service Technician's Personal Page contains the menu. The HOME link on the left hand side is the Technician's main page. The LOGIN link allows a Service Advisor, Owner, or Manager, to log in and view the Service Advisor main page. The COMPACT link compresses the display and moves it to the upper right corner of your monitor for fast reopening and entry of future work orders. It continuously displays the company's progress towards shop's goals. The COMPACT VIEW provides the actual, projected, optimal, sold, goal, and avg/wo hours (average production hours). The Service Technician's personal page also contains a TIMESHEET LINK which provides a weekly timesheet to view or print for that technician. And finally the scoreboard which is a display of the technician team that automatically changes based on the scores of the individuals.

On the left hand side of the Service Technician page is the **A** AVAILABLE WORK BOX. This box contains current week work orders assigned to the Service Technician. It also shows hours dispatched for each work order.

Below the AVAILABLE WORK BOX you will see the **B** SEARCH BOX. This box allows you to perform a search for work orders. Simply enter the work order number and hit the enter key on your keyboard.

Located in the center of the Service Technician page is the **C** EDIT WO BOX. This box allows you to enter the amount of HOURS WORKED on that work order after selecting in from the Available Work box.

Actual Hrs.	Hrs. to Goal	Projected	
40.5	12.5	45.8	
Goal	Optimal	Prod. Rate	AVG/WO
53.0	46.8	1.1	2.7

HRS	Sunday	%
9.2	1.4	86.8%
11.6		109.4%
11.3		106.6%
6.9	3.7	65.1%
1.5	9.1	14.2%

PROD	GOAL
40.5	53.0
OPTIMAL	
46.8	

Service Technician Personal Page

All figures shown are for a business week

Select a work order with work history by either searching for a work order number via the **A** SEARCH box or selecting it from the **B** WO LIST in the **WORK WEEK HISTORY** box by mousing over a day and clicking the work order number with time produced on it.

An **C** arrowhead icon in the **EDIT WO** box under the DISPATCH column indicates that there is work history to be viewed or edited. The color displayed for the dispatched hours under the DISPATCH COLUMN represents the work category. Mousing over the colored dispatched hours will display the category. Clicking on the arrowhead expands the work history for this dispatch record so work records can be **D** edited or **E** deleted. The **F** hours available for each dispatch appear under the AVAILABLE column. And the **G** CHECK ALL box, if checked, toggles all work done.

The screenshot shows the 'Service Technician Personal Page' interface. At the top, there are tabs for 'HOME', 'COMPACT', 'TIMESHEET', and 'SCOREBOARD', along with a 'LOGOUT' link. The main area is divided into three sections: 'AVAILABLE WORK', 'EDIT WO', and 'WORK WEEK HISTORY'.

AVAILABLE WORK: Lists work orders with hours: 14.5 Hrs. - 4834, 2.1 Hrs. - 4850, 1.0 Hrs. - 4857.

EDIT WO: Shows 'WO NUM: 4834' with a folder icon. Below it, 'Dispatched: 16.0' and 'Produced: 1.5'. There are input fields for 'Disp:' (2.0), 'Available:' (0.5 / 0.5), and a 'Check All' checkbox. A date '9/24/08' is shown. At the bottom, there are 'CANCEL' and 'DONE' buttons. Annotations: **A** points to the 'SEARCH' box; **C** points to the arrowhead icon; **D** points to the edit icon; **E** points to the delete icon; **F** points to the 'Available' field; **G** points to the 'Check All' checkbox.

WORK WEEK HISTORY: Shows a bar chart for hours produced over the week. Days and percentages are listed: Sunday (0%), Monday (9.2% / 1.4 / 86.8%), Tuesday (11.6% / 109.4%), Wednesday (11.3% / 106.6%), Thursday (6.9% / 3.7 / 65.1%), Friday (1.5% / 2%). A 'WO LIST - Thursday' popup shows work orders: 4832 - 0.4 Hours and 4843 - 6.5 Hours.

Summary Table:

Actual Hrs.	Hrs. to Goal	Projected
40.5	12.5	45.1
Goal	Optimal	Prod. Rate
53.0	47.3	1.1

PROD: 40.5 (green bar), 17.6 (grey bar). **GOAL:** 53.0 (blue bar), 47.3 (blue bar).

At the bottom of the **EDIT WO** box, the **DONE** button logs the time entered in any and all hour boxes.

The **MARK AS COMPLETE** checkbox, if checked, flags the WO complete for technician even if all dispatched hours haven't been done.

Note: QuickTrac Version 2.4 allows the technician 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.

Service Technician Personal Page

All figures shown are for a business week

To the right hand side of the Service Technician's personal page is the **A** **WORK WEEK HISTORY** box. The **WORK WEEK HISTORY** box contains the **B** **HOURS**, **C** **DAILY GOAL** (OR TIME LEFT TO MEET THEIR GOAL), and the **D** **%** amounts columns. The **HOURS** column contains the amount of hours worked for each day. Before any work is produced on a day, the **DAILY GOAL** bar graph shows the number of hours the Service Technician should produce daily. The **DAILY GOAL** column also displays a daily production time color coded bar graph. To the **LEFT** of the **E** **LINE SEPARATOR**, the bar graph shows work completed for that day. **RED** is work that is under 60% relative to Technician's goal. **YELLOW** is work that is at 60% to 80% relative to their goal. **GREEN** is work that is at 80% to 100% relative to their goal. **DARK GREEN** is work that is at 100% or above their goal. To the **RIGHT** of the **E** **LINE SEPARATOR** in the bar graph, shows time left to meet their goal in **WHITE**. The **D** **%** column shows the percentage of work orders completed towards the Technician's goal for that day.

You can scroll over any **DAY** in the **WORK WEEK HISTORY** box to see a dialogue box with a **F** **WORK ORDER LIST** assigned to the Service Technician for the day. It also informs you how many hours were assigned for the work order. If there is a **LINE** through the work order, this means the work order has been completed. A work order with a **GREY** background means it has been verified. You can also click on any one of the work orders for editing. Scroll over "CLOSE" to close the dialogue box.

The screenshot shows the Service Technician Personal Page interface. The top navigation bar includes **HOME**, **COMPACT**, **TIMESHEET**, **SCOREBOARD**, and **LOGOUT**. The main content area is divided into three sections: **AVAILABLE WORK**, **EDIT WO**, and **WORK WEEK HISTORY**.

AVAILABLE WORK section shows a list of work orders with their hours and IDs: 14.5 Hrs. - 4834, 2.1 Hrs. - 4850, and 1.0 Hrs. - 4857. Below this is a **SEARCH** section with a **WO NUMBER** input field and a **SEARCH** button.

EDIT WO section displays details for work order **WO NUM: 4834**. It shows **Dispatched: 16.0** and **Produced: 1.5**. There are input fields for **Disp:** (2.0), **Available:** (0.5 / 0.5), and a date field (9/24/08). A **Mark WO Complete** checkbox is present, along with **CANCEL** and **DONE** buttons.

WORK WEEK HISTORY section shows a table of daily work data:

Day	Hrs	Goal	%
Sunday			
Monday	9.2	1.4	86.8%
Tuesday	11.6		109.4%
Wednesday	11.3		106.6%
Thursday	6.9	3.7	65.1%
Friday	1.5		2%

Annotations on the screenshot:

- A** points to the **WORK WEEK HISTORY** section header.
- B** points to the **WO NUM: 4834** label.
- C** points to the **1.4** value in the **Goal** column for Monday.
- D** points to the **86.8%** value in the **%** column for Monday.
- E** points to the **6.9** value in the **Hrs** column for Thursday.
- F** points to the **Close** button in the **WO LIST - Thursday** dialog box.

At the bottom, there is a **SCOREBOARD** section with a table of performance metrics:

Actual Hrs.	Hrs. to Goal	Projected
40.5	12.5	45.1

Below the scoreboard is another table with goals and averages:

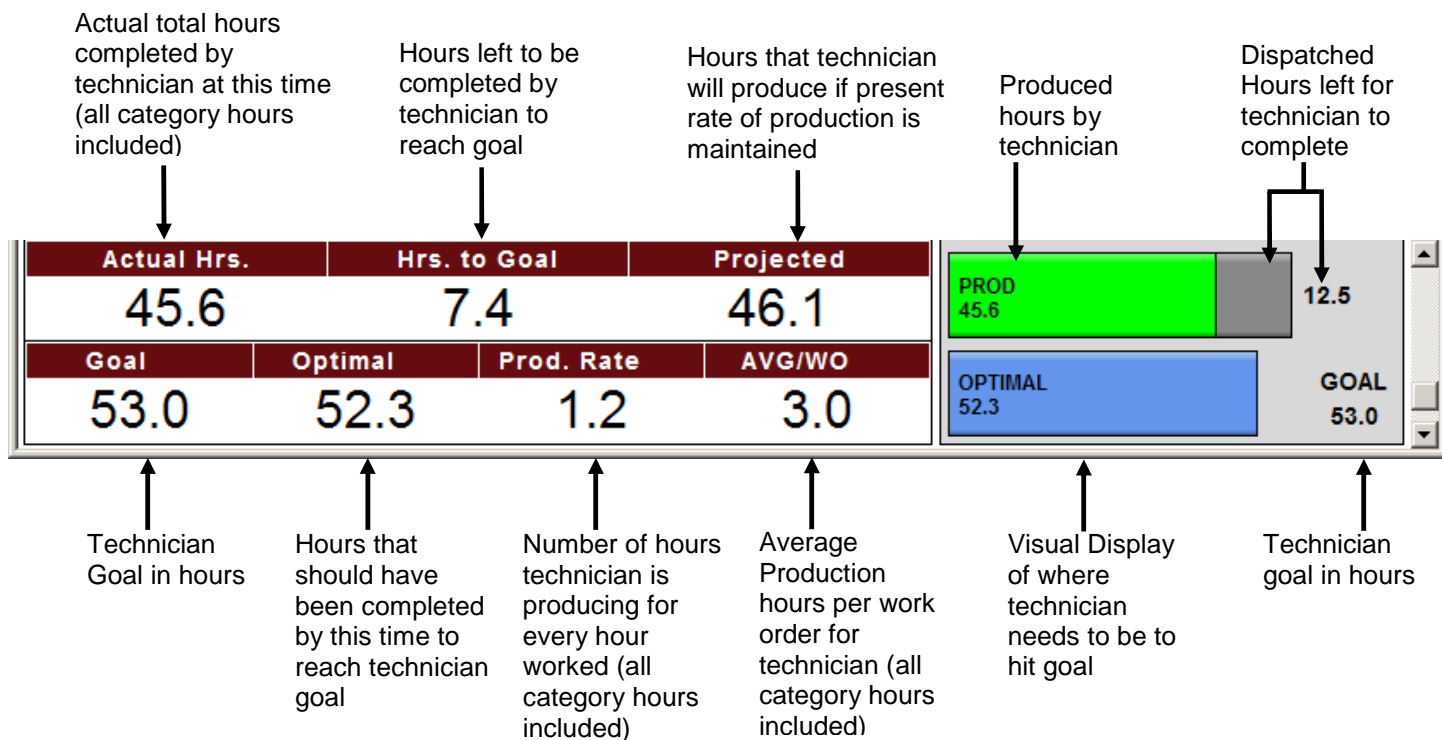
Goal	Optimal	Prod. Rate	AVG/WO
53.0	47.3	1.1	2.7

On the right side of the scoreboard, there are two bar graphs: **PROD 40.5** (green bar) and **GOAL 53.0** (blue bar).

Service Technician Personal Page

All figures shown are for a business week

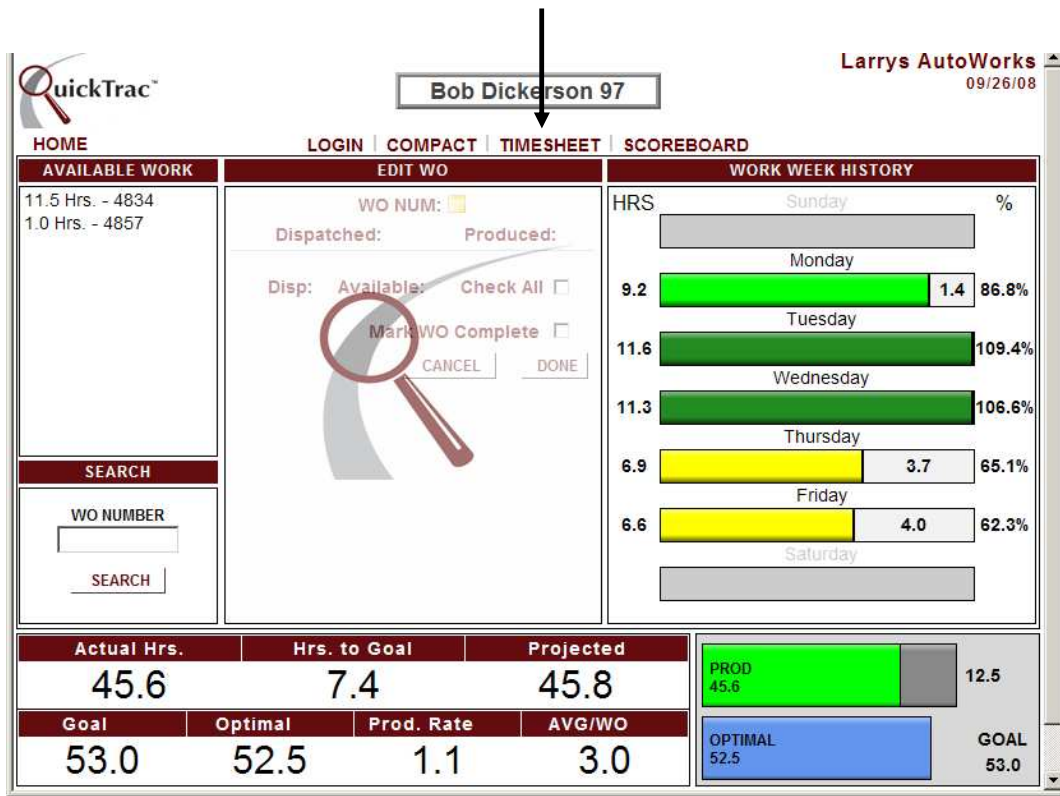
AVAILABLE WORK	EDIT WO	WORK WEEK HISTORY																
11.5 Hrs. - 4834 1.0 Hrs. - 4857	WO NUM: <input type="text"/> Dispatched: Produced: Disp: Available: Check All <input type="checkbox"/> Mark WO Complete <input type="checkbox"/> CANCEL DONE	HRS Sunday % Monday 9.2 1.4 86.8% Tuesday 11.6 109.4% Wednesday 11.3 106.6% Thursday 6.9 3.7 65.1% Friday 6.6 4.0 62.3% Saturday																
SEARCH WO NUMBER <input type="text"/> SEARCH																		
<table border="1"> <thead> <tr> <th>Actual Hrs.</th> <th>Hrs. to Goal</th> <th>Projected</th> </tr> </thead> <tbody> <tr> <td>45.6</td> <td>7.4</td> <td>46.1</td> </tr> <tr> <th>Goal</th> <th>Optimal</th> <th>Prod. Rate</th> </tr> <tr> <td>53.0</td> <td>52.3</td> <td>1.2</td> </tr> </tbody> </table>		Actual Hrs.	Hrs. to Goal	Projected	45.6	7.4	46.1	Goal	Optimal	Prod. Rate	53.0	52.3	1.2	<table border="1"> <tbody> <tr> <td>PROD 45.6</td> <td>12.5</td> </tr> <tr> <td>OPTIMAL 52.3</td> <td>GOAL 53.0</td> </tr> </tbody> </table>	PROD 45.6	12.5	OPTIMAL 52.3	GOAL 53.0
Actual Hrs.	Hrs. to Goal	Projected																
45.6	7.4	46.1																
Goal	Optimal	Prod. Rate																
53.0	52.3	1.2																
PROD 45.6	12.5																	
OPTIMAL 52.3	GOAL 53.0																	



Week at a Glance and Timesheets

WEEK AT A GLANCE is a tool that allows users to view the last three weeks of shop's data. Users can view employee's graphs and numbers as well as view and print timesheets for Service Technicians.

To access TIMESHEETS while logged in as a Technician or Service Advisor, click on a Technician name or bar graph and then click on the TIMESHEET link on the menu. Currently, only Technician's have Timesheets.



Next, select the current or one of three previous ending work weeks to view / print a Technician's Timesheet.

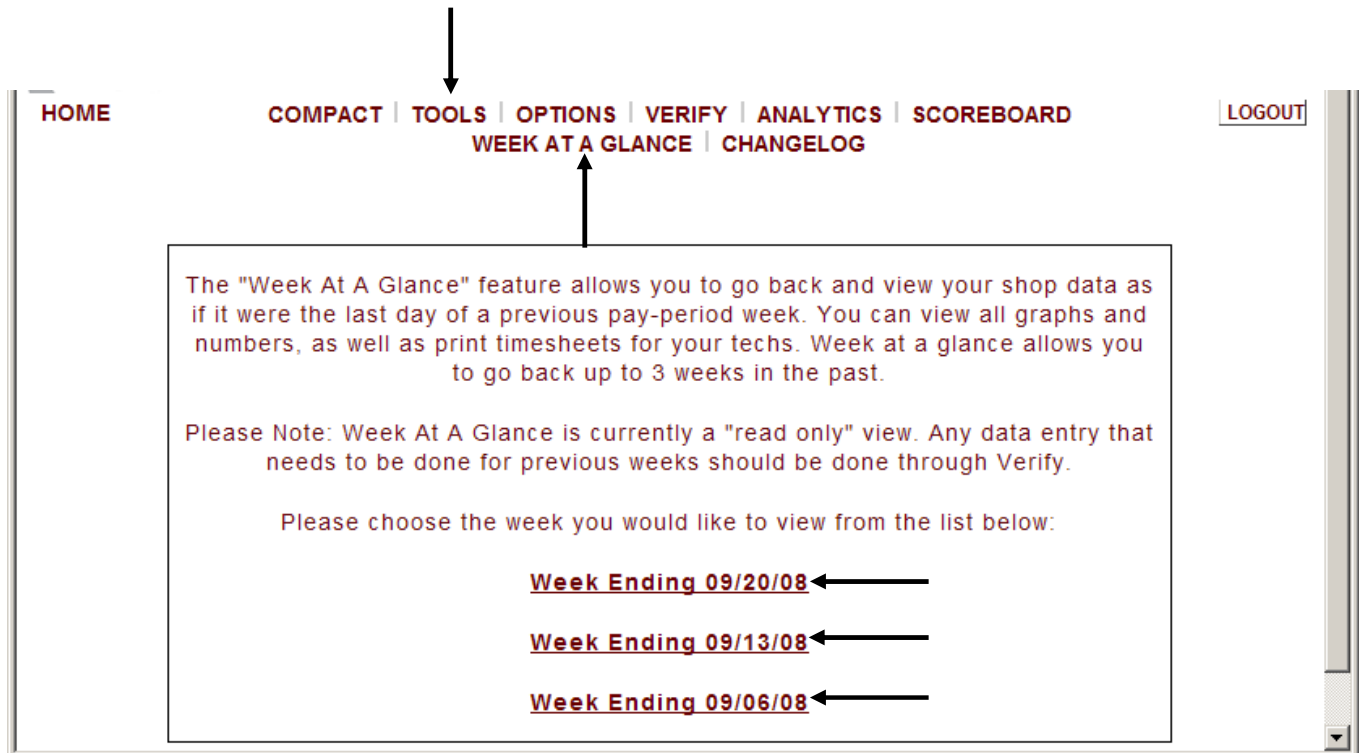
Please choose the week you would like a timesheet for:

Current Week

Current Week
Week Ending 8/23/08
Week Ending 8/16/08
Week Ending 8/9/08

Week at a Glance and Timesheets

To access WEEK AT A GLANCE while logged in as a Manager/Owner. Click on the TOOLS link on the menu. Then, click on the WEEK AT A GLANCE link.



The last three ending work weeks of your shop will display. Select one of the three weeks to view that week's data.

Note: If anyone is marked as INACTIVE they will not appear in WEEK AT A GLANCE. Any data that needs to be modified for previous weeks needs to be done through VERIFY. Currently, WEEK AT A GLANCE is a "read only" view.

The week you select displays the Service Advisor's Main Page.

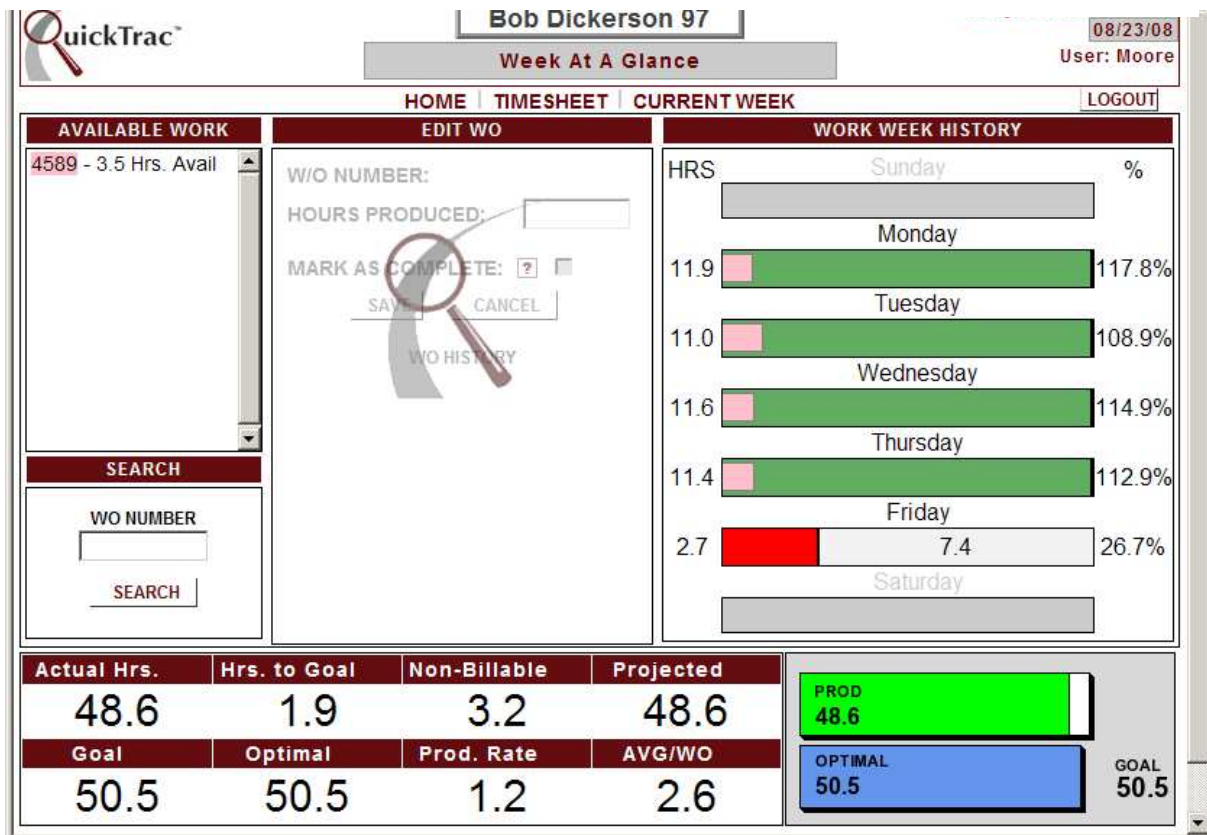
Each employee's personal page is available for viewing by simply clicking on their name or bar graph. The HOME link is the Service Advisor Main Page as shown below. The CURRENT WEEK link will display the current day of your current work week.

Note: The shop's data displays as if it were the last work day of the selected week.

Click on any Technician's bar graph and then click on the TIMESHEET link to access Timesheets.

Week at a Glance and Timesheets

Clicking on a Service Technician's bar graph takes you to that Service Technician's Personal Page. The HOME link takes you to the Service Technician's Main Page (The LOGOUT button at the top right also takes you to the Service Technician's Main Page). The TIMESHEET link provides a timesheet to view or print for that technician. And, the CURRENT WEEK link allows you to view the current day of your shop's current work week.



Click on the HOME link on the menu to go back to the Service Advisor's Main Page.

Next, click on the WEEK AT A GLANCE link at the top center of the page.



Week at a Glance and Timesheets

The WEEK AT A GLANCE link takes you back to select the current or last three work weeks for you to select from.

The "week at a glance" feature allows you to go back and view your shop data as if it were the last day of a previous shop week. You can view all graphs and numbers, as well as print timesheets for your techs. Week at a glance allows you to go back up to 3 weeks in the past.

Please Note: Week at a glance is currently a "read only" view. Any data entry that needs to be done for previous weeks should be done through Verify.

Please choose the week you would like to view from the list below:

[Current Week - Today](#)

[Week 42 - Ending on 10/20/06](#)

[Week 41 - Ending on 10/13/06](#)

[Week 40 - Ending on 10/06/06](#)

Select another week to view or use any of the other links on the main menu. If you want to view the current day of your current work week, click on the CURRENT WEEK – TODAY link.



Verify

Once a work order has been completed, your back-office staff will verify the work order: comparing the *projected* (forecast) values entered against the *actual* numbers entered on the physical work order. It requires the verifier to check the accuracy of work hours (sold, unsold, dispatched, and produced) and the actual sales figures (parts, labor, tax, sublet, etc) for each work order. Verification is done via the VERIFY link on the menu.

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 actuals be entered during the verify process. **Analytics is only as accurate as your Verified work order data.** It is in a shop's self-interest to ensure that all information entered on a work order is accurate.

To verify a work order, your QuickTrac profile has to have the permissions (Owner, Manager or an Accountant) that grants you access to the VERIFY menu.

When you click on the VERIFY menu, you will be presented with the verification WELCOME entry screen. The welcome entry screen provides a box for the work order number to be entered for verification.

WELCOME INITIAL WORK EDIT SOLD WORK ACTUALS VERIFY!

Enter Work Order Number:

Begin

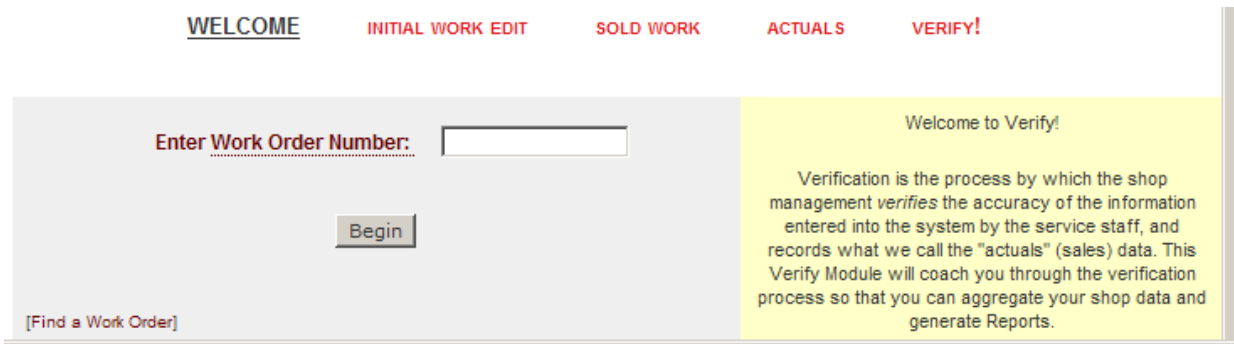
[Find a Work Order]

Welcome to Verify!

Verification is the process by which the shop management *verifies* the accuracy of the information entered into the system by the service staff, and records what we call the "actuals" (sales) data. This Verify Module will coach you through the verification process so that you can aggregate your shop data and generate Reports.

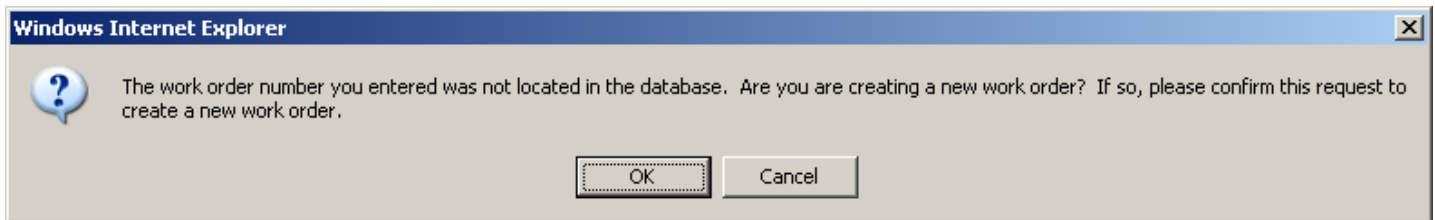
Verify

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



The screenshot shows the 'Verify' module interface. At the top, there is a navigation bar with five tabs: 'WELCOME' (underlined), 'INITIAL WORK EDIT', 'SOLD WORK', 'ACTUALS', and 'VERIFY!'. Below the navigation bar, the main area is split into two sections. The left section has a label 'Enter Work Order Number:' followed by a text input field and a 'Begin' button. Below the input field is a link '[Find a Work Order]'. The right section has a yellow background and contains the text 'Welcome to Verify!' followed by a paragraph explaining the verification process: 'Verification is the process by which the shop management verifies the accuracy of the information entered into the system by the service staff, and records what we call the "actuals" (sales) data. This Verify Module will coach you through the verification process so that you can aggregate your shop data and generate Reports.'

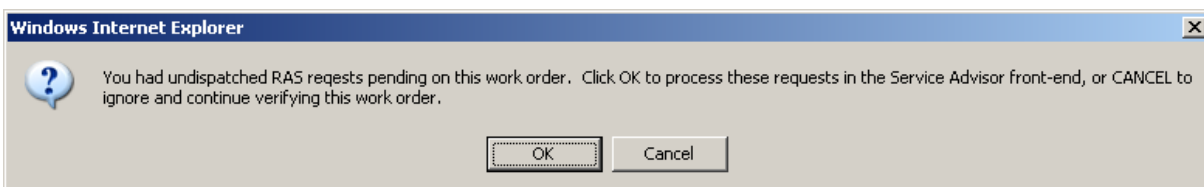
If the work order is a new work order number you will see a dialogue box that lets you know you are creating a new work order and to either confirm or cancel the request.



Note: If a shop has the RECOMMENDED ADDITIONAL SERVICES option turned on and in use; should a work order have pending RAS requests (found work that was not sold), the Verify module will show an alert that there are pending RAS events for the form and asks if you would like to process the RAS events or cancel to continue verification without presenting and selling the found work to the customer. Please read the RECOMMENDED ADDITIONAL SERVICES document for details on how to use RAS.

If you elect to process the pending RAS requests (by clicking the OK button), verification will take the user back to the service advisor page, to the RAS detail for that particular work order.

If the user elects not to process the RAS requests (by clicking the CANCEL button), the verification process will continue as usual.



Verify

The FIND A WORK ORDER link allows you to find work orders using QuickTrac's search filters.

The screenshot shows the 'Verify' module interface. At the top, there are navigation links: WELCOME, INITIAL WORK EDIT, SOLD WORK, ACTUALS, and VERIFY! (highlighted in red). Below these, there's a section for finding work orders. On the left, a speech bubble says: 'This link will allow you to filter and search for work orders by status, service staff, dates, etc'. In the center, there's a text input field labeled 'Enter Work Order Number:' with a 'Begin' button below it. On the right, a yellow box contains the text: 'Welcome to Verify! Verification is the process by which the shop management verifies the accuracy of the information entered into the system by the service staff, and records what we call the "actuals" (sales) data. This Verify Module will coach you through the verification process so that you can aggregate your shop data and generate Reports.'

The WORK ORDER STATUS drop down box allows you to narrow down a list of work orders by the following criteria:

- Work Order Status
 - Active – not marked as completed by the tech
 - Completed – all work marked as completed by the tech
 - Verified – work orders previously verified
 - Deleted – work orders marked deleted
 - All including deleted
 - All not including deleted
 - All that are not verified
- Created By (click “**off**” to turn off the created by search filter)
 - Service Advisor
- Assigned To (click “**off**” to turn off the assigned to search filter)
 - Service Technician
 - Everyone else - Manager, Owner, or Accountant
- Created On (click “**reset created on**” to reset created on date)
 - Work orders created on a specific date
- Created Between (click “**reset created between**” to reset created between date)
 - Work orders created between specific dates (click “**reset ending on**” to reset end date)
- Work Order Like
 - Work orders containing the characters entered

Several filters can be combined to further restrict your search. For example, you could set search filters that read “show me Active work orders assigned to, Robert, created on July 30, 2008.”

The screenshot shows the 'QuickTrac-Verification Advanced Search Engine' interface. It features several search filters: 'Work Order Status' (dropdown menu set to 'Active'), 'Created By' (radio buttons for 'Service Advisors' and '(A) B Dickerson 97'), 'Assigned To' (radio buttons for 'Everyone Else' and 'off'), 'Created On' (text input with a calendar icon and a '(reset Created On:)' link), 'Created Between' (text input with a calendar icon and a '(reset Created Between:)' link), '...and Ending On' (text input with a calendar icon and a '(reset Ending On:)' link), and 'Work Order Like' (text input). On the right, there's a section for 'Active Search Filters' showing 'STATUS: ACTIVE' and 'ASSIGNED TO: SERVICE TECH'. Below this is a 'Start Search' button. At the bottom right, there's a box for 'Search Results' showing a list of work orders: '2008-04-29 - (A) - 3488', '2008-05-14 - (A) - 3608', '2008-05-16 - (A) - 3624', and '2008-06-17 - (A) - sallyg'. At the bottom center, there's a link: '[Return to Verify Main Page]'.

Verify

After you have entered the filter of choice, click on the START SEARCH button on the right hand side. QuickTrac will present a list of work orders that meet the criteria in the list box in the SEARCH RESULTS BOX. The work orders that appear in the box are presented in a three-column format: the date the work order was created, the work order status, and the work order number. The work order number is a link. Clicking on this link will pull it up into the INITIAL WORK EDIT SCREEN.

Note: The work orders listed in the search results box are sorted by their creation date.

The screenshot shows the 'Verify' search interface. On the left, there are filters: 'Work Order Status' set to 'Active', 'Created By' set to '(A) B Dickerson 97', and 'Assigned To' set to 'Everyone Else'. There are also date pickers for 'Created On', 'Created Between', and '...and Ending On'. A 'Work Order Like' field is at the bottom. On the right, there are buttons for 'STATUS: ACTIVE', 'ASSIGNED TO: SERVICE TECH', and a 'Start Search' button. Below these is a 'Search Results' box containing a list of work orders: '2008-04-29 - (A) - 3488', '2008-05-14 - (A) - 3608', '2008-05-16 - (A) - 3624', and '2008-06-17 - (A) - sallyg'. At the bottom, there is a '[Return to Verify Main Page]' link.

The INITIAL WORK EDIT screen will appear. The work order number, date created and/or ad code fields can be edited here. You can delete the work order if it is in an unverified state. If a work order has already been verified, you may un-verify it, removing the information from the reporting tables. The button at the bottom of the page next to the left of the continue button will let you know the action you can take with that particular work order.

To edit a work order number on the initial work edit screen click on the work order number itself.

The screenshot shows the 'INITIAL WORK EDIT' screen. At the top, there is a navigation bar with links: HOME, COMPACT, HISTORY, OPTIONS, VERIFY, ANALYTICS, SCOREBOARD, and a LOGOUT button. The main content area has a header with 'WELCOME' and a list of tabs: INITIAL WORK EDIT, SOLD WORK, ACTUALS, and VERIFY. A callout box points to the 'Work Order Number' field, which contains 'sally3'. Another callout box points to the 'Work Order Number' field, stating 'Click on actual work order number (sally3) to edit WO#'. Below the 'Work Order Number' field are fields for 'Date Created' (2009-03-22) and 'Ad-Code' (Existing customer). At the bottom, there are buttons for 'Delete Work Order' and 'Continue...'. On the right, there is a yellow box titled 'Edit Header Help' with the text 's you to update the work order header information.' and a list of bullet points: 'The work order number is a 4-16 digit alpha-numeric field that you can edit by clicking the work order number.', 'The created-date allows you to book the work for any calendar date in the past.', and 'You may also adjust the ad-code which is used in reports to help you to determine effective advertising strategies.'


Verify

The edit work order number dialogue box will appear as shown below. To confirm that you want to edit the old work order number to a new one, enter the new work order number and click on the SAVE CHANGES button. Or you can back out of the edit screen by clicking on the CANCEL EDIT button.



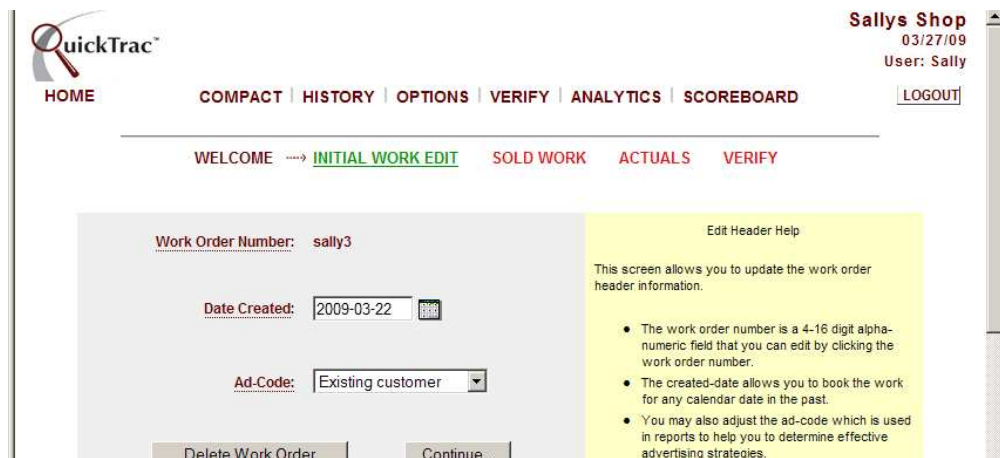
A dialog box titled "Edit Work Order Number" with a close button (X) in the top right corner. The text inside reads: "You are changing the Work Order number. You are not fetching a new work order to edit. Edit the Work Order number below." Below this text, there are two labels: "Old Work Order Number:" followed by the text "ddddd", and "New Work Order Number:" followed by a text input field containing "ddddd". At the bottom, there are two buttons: "Cancel Edit" and "Save Changes".

If the work order number being edited to is already in use, then a message will appear as shown below in that the work order number is already in use. You will simply need to select an available work order number that has not already been used to proceed and save changes.



A dialog box titled "Edit Work Order Number" with a close button (X) in the top right corner. The text inside reads: "You are changing the Work Order number. You are not fetching a new work order to edit. Edit the Work Order number below." Below this text, there is a red error message: "This Work Order number is already in use." Below the error message, there are two labels: "Old Work Order Number:" followed by the text "newwob", and "New Work Order Number:" followed by a text input field containing "newwob". At the bottom, there are two buttons: "Cancel Edit" and "Save Changes".

Click on the SAVE CHANGES to confirm or back out of the edit screen by clicking on the CANCEL EDIT button.



A screenshot of the "Initial Work Edit" screen in the QuickTrac software. The top navigation bar includes the QuickTrac logo, a "HOME" link, and a series of links: "COMPACT", "HISTORY", "OPTIONS", "VERIFY", "ANALYTICS", and "SCOREBOARD". On the right side, there is a "Logout" button. Below the navigation bar, there is a breadcrumb trail: "WELCOME" followed by a right-pointing arrow and "INITIAL WORK EDIT", then "SOLD WORK", "ACTUALS", and "VERIFY". The main content area is divided into two sections. The left section contains the following fields: "Work Order Number:" with the value "sally3", "Date Created:" with the value "2009-03-22" and a calendar icon, and "Ad-Code:" with a dropdown menu showing "Existing customer". At the bottom of this section are two buttons: "Delete Work Order" and "Continue...". The right section is titled "Edit Header Help" and contains a paragraph: "This screen allows you to update the work order header information." Below this paragraph is a bulleted list: "• The work order number is a 4-16 digit alpha-numeric field that you can edit by clicking the work order number.", "• The created-date allows you to book the work for any calendar date in the past.", and "• You may also adjust the ad-code which is used in reports to help you to determine effective advertising strategies."

Click on the CONTINUE button to save and confirm data entries on the INITIAL WORK EDIT screen.

Note: If at any point you need to go back to a previous screen such as the WELCOME, INITIAL WORK EDIT, SOLD WORK, or ACTUALS screen, click back on the link where you need to be and continue through the steps.

Verify



The next screen is the SOLD WORK screen.


[HOME](#)
[COMPACT](#)
[HISTORY](#)
[OPTIONS](#)
[VERIFY](#)
[ANALYTICS](#)
[SCOREBOARD](#)
















[LOGOUT](#)

WELCOME
 → INITIAL WORK EDIT
 → **SOLD WORK**
 ACTUALS
 VERIFY!

Work Order:
sally02

 Note
  Add Sale

 HOURS:
 Sold: 5.00
 Dispatched: 5.00
 Produced: 4.00

Event	Date	Category	Svc Advsr	Technician	Dollars		Hours		Edit	Del	Ack
					Declined	Sold	Declined	Sold			
Initial Sale	2008-12-15	None Selected	Seghpos, Paul		\$0.00	\$75.00	0.00	1.00			
Work Dispatched	2008-12-15		Seghpos, Paul	Dickerson 97, Bob				1.00			
Work Produced	2008-12-15			Dickerson 97, Bob				1.00			
Upsell	2008-12-15	Mitchellin	Seghpos, Paul		\$2.00	\$200.00	2.00	4.00			
Work Dispatched	2008-12-15		Seghpos, Paul	Tai 47, Bailey				4.00			
Work Produced	2008-12-15			Tai 47, Bailey				2.00			
Work Produced	2008-12-15			Tai 47, Bailey				1.00			

The top section of the SOLD WORK screen in Verify shows the color-coded state of your work order, along with three icons.

The left-most box is color-coded and displays the work order number of the work order being verified. The color-coding is as follows:

Work Order:
sally02

 Note
  Add Sale

 HOURS:

Sold: 5.00
Dispatched: 5.00
Produced: 4.00

RED	= STOP --> Your work order is out of balance and must be corrected.
YELLOW	= CAUTION --> Your work order is out of balance but may be verified. Note: If display is shown in yellow, check the add column (last column on the right hand side) and check to see if there is any add icons that need completion.
GREEN	= GO --> Your work order is in-balance and you may proceed to screen 4.

 **Note**

The icon allows you to add or edit existing notes about the work order. If the note icon is green, then notes about the work order already exist and you may click the icon to view them. If the note icon is yellow (as shown), then no notes about the work order exist, but you may click the icon to add one.

Add Sale

Clicking on the Add-Sale icon is used to add a new Sales Event to the work order.



Information Icon - You will only see this icon on a work order in a Yellow state - the hover-text of the icon will contain a message from QuickTrac informing you of what QuickTrac believes needs to be done with the work order to move it into a green status.



Happy-face is seen only on a work order in a green status - this icon confirms that the work order is in perfect balance and you may continue processing your work order.

Note: As with all QuickTrac icons, when you place your mouse cursor over the icon, helpful text will pop-up explaining the purpose of the icon.

Verify

Each event will show the SALES, the WORK DISPATCH data, and the WORK PRODUCED data. All data can be edited. Keep in mind that dispatched time can only be entered less than or equal to the amount of sold work. And, produced time can only be entered less than or equal to the amount that was dispatched. Otherwise, an error message will appear: “You may not produce more hours than has been dispatched” or “You may not dispatch more hours than has been sold.”

[HOME](#) [COMPACT](#) | [HISTORY](#) | [OPTIONS](#) | [VERIFY](#) | [ANALYTICS](#) | [SCOREBOARD](#) [LOGOUT](#)

[WELCOME](#) [INITIAL WORK EDIT](#) [SOLD WORK](#) [ACTUALS](#) [VERIFY!](#)

Work Order:
sally02

Note Add Sale

HOURS: Sold: 5.00
Dispatched: 5.00
Produced: 4.00

Event	Date	Category	Svc Advsr	Technician	Dollars		Hours		Edit	Del	Add
					Declined	Sold	Declined	Sold			
Initial Sale	2008-12-15	None Selected	Seghposs, Paul		\$0.00	\$75.00	0.00	1.00			
Work Dispatched	2008-12-15		Seghposs, Paul	Dickerson 97, Bob				1.00			
Work Produced	2008-12-15			Dickerson 97, Bob				1.00			
Upsell	2008-12-15	Mitchellin	Seghposs, Paul		\$2.00	\$200.00	2.00	4.00			
Work Dispatched	2008-12-15		Seghposs, Paul	Tai 47, Bailey				4.00			
Work Produced	2008-12-15			Tai 47, Bailey				2.00			
Work Produced	2008-12-15			Tai 47, Bailey				1.00			

Continue...

Under the initial sale and upsell entries, work order details will display. The SALE line entry shows the dispatched date, the category, service advisor that dispatched the work, dollars declined and sold, and hours declined and sold. The WORK DISPATCH line entry will show the date the work was dispatched, service advisor that dispatched the work, the technician the service advisor dispatched the work to, and the hours dispatched. The WORK PRODUCED line entry will provide the date the technician produced the work, the technician that produced the work, and the hours produced will be seen. If any of these items were not entered in the front end by the Service Advisor or Technician, an Add icon will be provided on the last column to the right to enter any missing data.

To the right of each event's row you can either EDIT or DELETE an entry. The last column on the right, the ADD column, will provide an icon if any event is out of balance. To edit an entry click on the edit icon on the right hand side of an entry. To delete an entry, click on the delete icon on the right hand side. All records beneath the record you delete will also be deleted.

Verify

The ACTUALS screen is a simple tab that is divided into two sections. The right section contains an explanation of the purpose of the actuals tab and why it's important to complete this section.

The left section provides a section to enter actual data from the physical work order. The term "actuals" represents the *actual values*, in dollars, as collected from the customer.

The Actuals tab will display the work order number you are working on. Below the work order number there is a Closing Date box. Click on the date the customer paid for the work that was produced. Next, enter the actuals data from the physical work order on the left section of the table

The actuals are divided into the following categories:

- LABOR – dollars charged to the customer for the time produced by the technician,
- PARTS – dollars charged to the customer for parts used to complete the WO.
- SUBLET – dollars charged to the customer for sub-leased work not performed by your shop.
- OTHER – a category defined internally by your shop for your own use. This allows you to create a new category. (Example: tires, batteries, diagnostic labor, etc.)
- TAX – the amount of money charged as tax to the customer.
- DISCOUNT CODE – The discount codes allow the verifiers to enter discounts against the value of the final work order (actuals) in order to accurately capture relevant discounts against the WO. If you enter a discount amount, you must enter a discount code.

There are, by default, seven DISCOUNT codes pre-populated for every shop.

Customer Satisfaction
Coupon or Promotion
Shop Error
Valued Customer
Employee
Preferred Customer
AAA Discount

Discount Codes are managed through the OPTIONS menu, sub-menu item DISCOUNT. As with all other shop options, management of the discount codes is identical to any other options-based management process with respect to additions, modification and deletions. Once a discount code is deleted, the codes are permanently removed from the table.

Auto Geniuses
09/25/08
User: Moore
[LOGOUT](#)

IMPACT | TOOLS | OPTIONS | VERIFY | ANALYTICS | SCOREBOARD

HOME → INITIAL WORK EDIT → SOLD WORK → **ACTUALS** | VERIFY!

SUMMARY:
Work Sold: 7.00 hrs.
Work Dispatched: 7.00 hrs.
Work Produced: 7.0 hrs.
Dollars Forecast: \$1650
Actual Revenue: \$1646.37

Work Order: 4825
Closing Date: 2008-09-23

Labor:	\$1,094.00
Parts:	\$503.88
Sublet:	\$0.00
Other:	\$6.92
Tax:	\$41.57
Discount:	\$0.00
TOTAL:	\$1,646.37

Please enter the actual dollar amounts from the work order:
Labor - the shop rate charges for the work order.
Parts - the amount charged on parts.
Sublet - work sub-contracted out.
Other - miscellaneous charges.
Tax - amount collected in state and local taxes.
Discount - amount, in dollars, discounted from the work order.
(Notes:
- If you enter a discount amount, you must enter a discount code.
- All amounts are in dollars and cents.
- All amounts are positive (greater than zero) values.
- The TOTAL amount is auto-calculated as you exit a field.
- The TOTAL amount is safe-guarded against casual edit.)

[Continue...](#)

The TOTAL amount is auto-calculated as you exit a field and is safe-guarded against casual edit. Click on the Continue button to confirm entries.

Verify

The last screen is the VERIFY screen. The Verify screen will show the work order number, the total hours produced, total dollars estimated (initial, upsell, and declined sold dollars), the total amount collected (actuals) from the customer, the date it was created on, and the date the technician closed the wo.

Mousing over the work order number will allow you to see summary details.

Auto Geniuses
09/25/08
User: Moore
[LOGOUT]

SUMMARY:
Work Sold: 7.00 hrs.
Work Dispatched: 7.00 hrs.
Work Produced: 7.0 hrs.
Dollars Forecast: \$1650
Actual Revenue: \$1646.37

IMPACT | TOOLS | OPTIONS | VERIFY | ANALYTICS | SCOREBOARD

HOME → INITIAL WORK EDIT → SOLD WORK → **ACTUALS** **VERIFY!**

Work Order: 4825
Closing Date: 2008-09-23

Labor: \$1,094.00
Parts: \$503.88
Sublet: \$0.00
Other: \$6.92
Tax: \$41.57
Discount: \$0.00
TOTAL: \$1,646.37

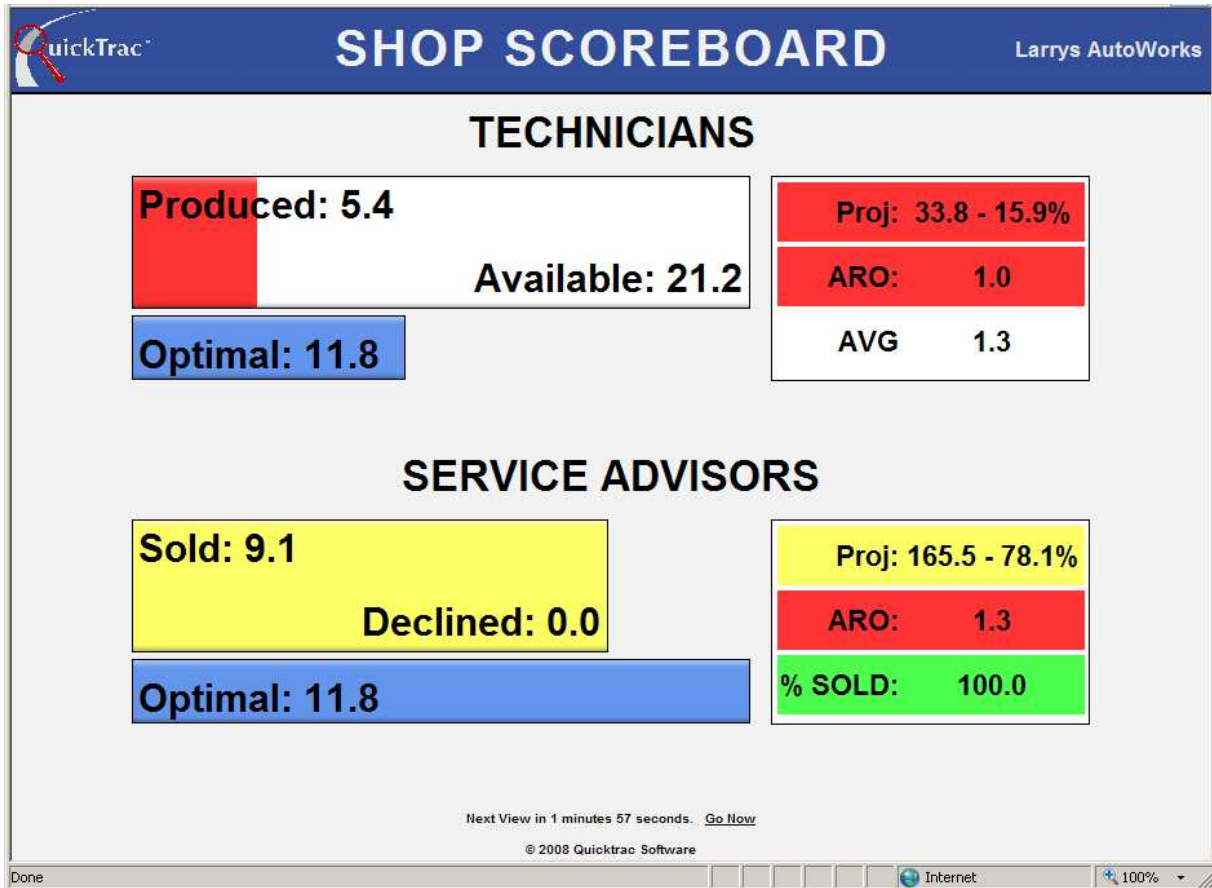
Please enter the actual dollar amounts from the work order:
Labor - the shop rate charges for the work order.
Parts - the amount charged on parts.
Sublet - work sub-contracted out.
Other - miscellaneous charges.
Tax - amount collected in state and local taxes.
Discount - amount, in dollars, discounted from the work order.
(Notes:
- If you enter a discount amount, you must enter a discount code,
- All amounts are in dollars and cents,
- All amounts are positive (greater than zero) values.
- The TOTAL amount is auto-calculated as you exit a field.
- The TOTAL amount is safe-guarded against casual edit.)

Continue...

The final step is verifying the work order. Verifying a work order means that you have changed the status of the work order from a “completed”, or “active”, state to a “verified” state. When you change the work order state to verified, you are marking that work order as ready-for-processing by the Analytics module.

Scoreboard

The SHOP SCOREBOARD view is derived in real-time from the information available in the main program. It was developed for shops to view a large screen display of their team that automatically changes based on the scores of the individuals.

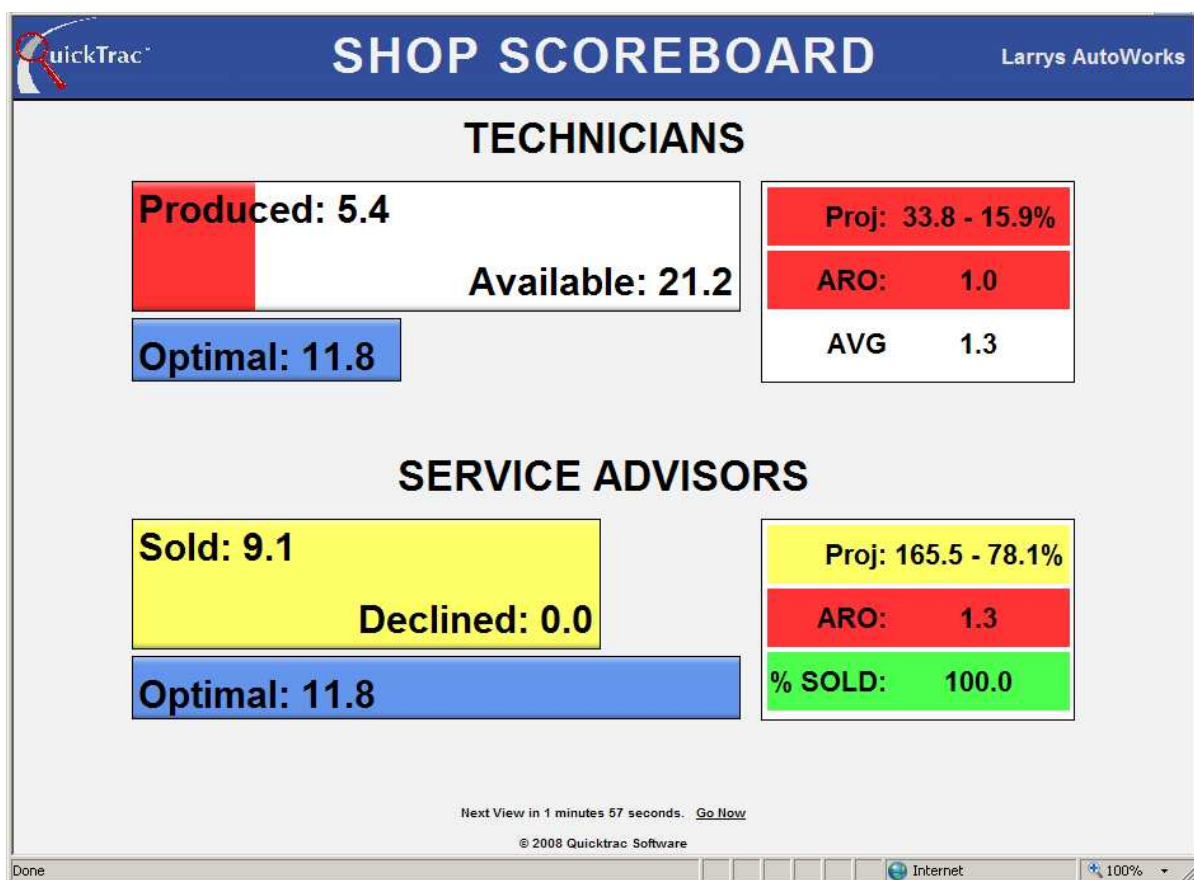


When you view the shop scoreboard you will be able to see real-time information on how the technician team is producing towards their weekly goal and how the Service Advisor Team is performing on their sales towards their weekly goal.

Scoreboard

The TECHNICIAN team's graph will show real-time information of:

- Produced: total hours produced and marked completed by technician team
- Available: total hours of available work to produce
- Optimal: ideal hours to be completed at current time to reach technician team goal by end of work week
- Projected (Proj): projected production if current rate of production is maintained (projected hours and percentage of technician team goal)
- hours and percentage of goal that technician team will produce if current rate of production is maintained
- Average Work Order (AWO): average production hours per work order for technician team
- Average: Average hours of work found by technician team

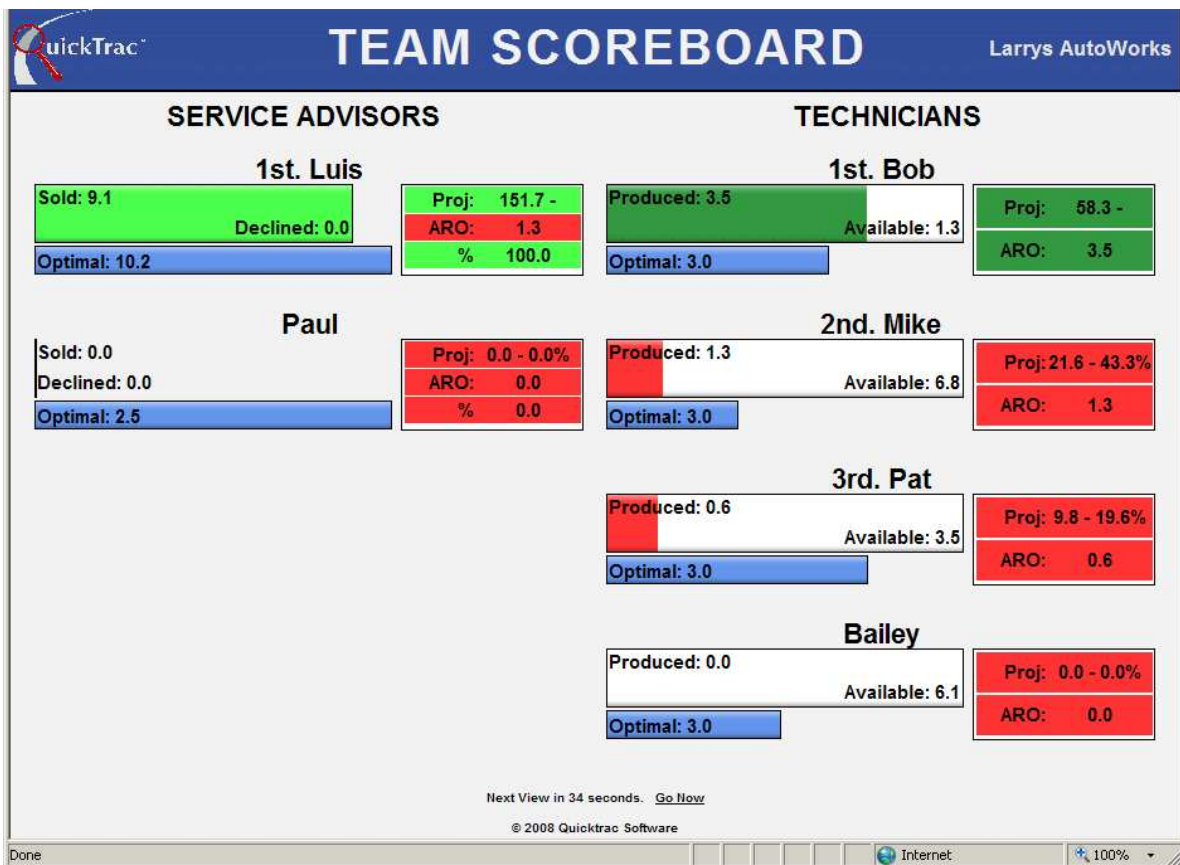


The SERVICE ADVISOR team's graph will show real-time information of:

- Sold: total hours sold by service advisor team
- Declined: total unsold hours by service advisor team at this time
- Optimal: ideal hours to be sold at current time to reach service advisor team goal by end of work week
- Projected (Proj): projected sales if service advisors continue to sell at current sell rate (projected hours and percentage of service advisor team goal)
- Average Work Order (AWO): average hours sold per work order
- % Sold: percentage of work sold, of total sales opportunity (sold and declined work)

Scoreboard

The scoreboard updates the display, putting the highest ranked individuals on top, based on the latest information entered.



For each Service Advisor, you will see the following:

- Sold: total hours sold by Service Advisor
- Declined: total hours unsold by Service Advisor
- Optimal: ideal hours to be sold at current time for service advisor to hit goal by end of work week
- Projected (Proj): total sales projected if service advisor continues to sell at current sell rate
- Average Work Order (AWO): Average hours sold per work order by service advisor
- % Sold: Percentage of work sold, of total sales opportunity (sold & declined work)

And for each Technician, you will see the following:

- Produced: total hours produced and marked completed by technician
- Available: available hours left for technician to work on
- Optimal: ideal hours to be produced at current time to reach technician goal by end of week
- Projected (Proj): hours that technician will produce if current rate of production is maintained
- Average Work Order (AWO): Average hours produced per work order by technician

The display window will count down every 2 minutes to show the “NEXT VIEW” or click on “Go now” to view the next screen on demand.

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.

QuickTrac™

Sallys Shop
09/26/08
User: Sally

HOME COMPACT TOOLS OPTIONS VERIFY ANALYTICS SCOREBOARD

Reports - Step 1 - Specify Date Range

Specific Date Range:

Work Order Start Date: [] []

Work Order End Date: [] []

Continue...

...or...

Pre-set Date Range:

☒ Last 7 Days Shown as Days

☐ Last 14 Days ☐ Show as Days

☐ Last 21 Days ☐ Show as Weeks

☐ Last 30 Days

☐ Last 60 Days Shown as Weeks

☐ Last 90 Days Shown as Weeks

☐ Last 180 Days ☐ Show as Weeks

☐ Last 365 Days ☐ Show as Months

Continue...

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.

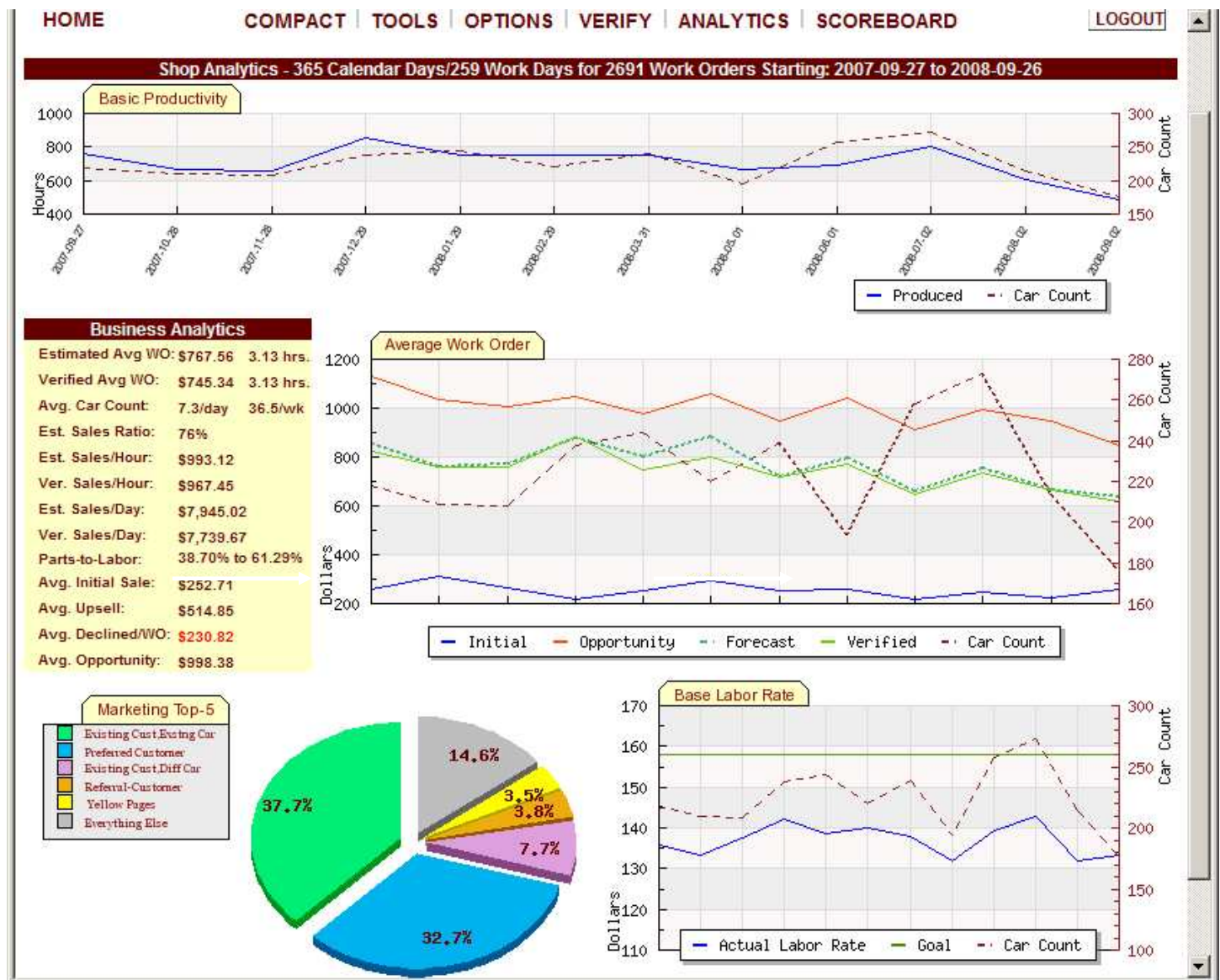
To use a PRE-SET DATE RANGE to view ANALYTICS, click on one of the preset date ranges. The PRE-SET DATE RANGES for the Last 14, 21, 30, and 180 days provides the option of showing either as days or weeks. Click on the CONTINUE button when you are ready to view ANALYTICS.

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

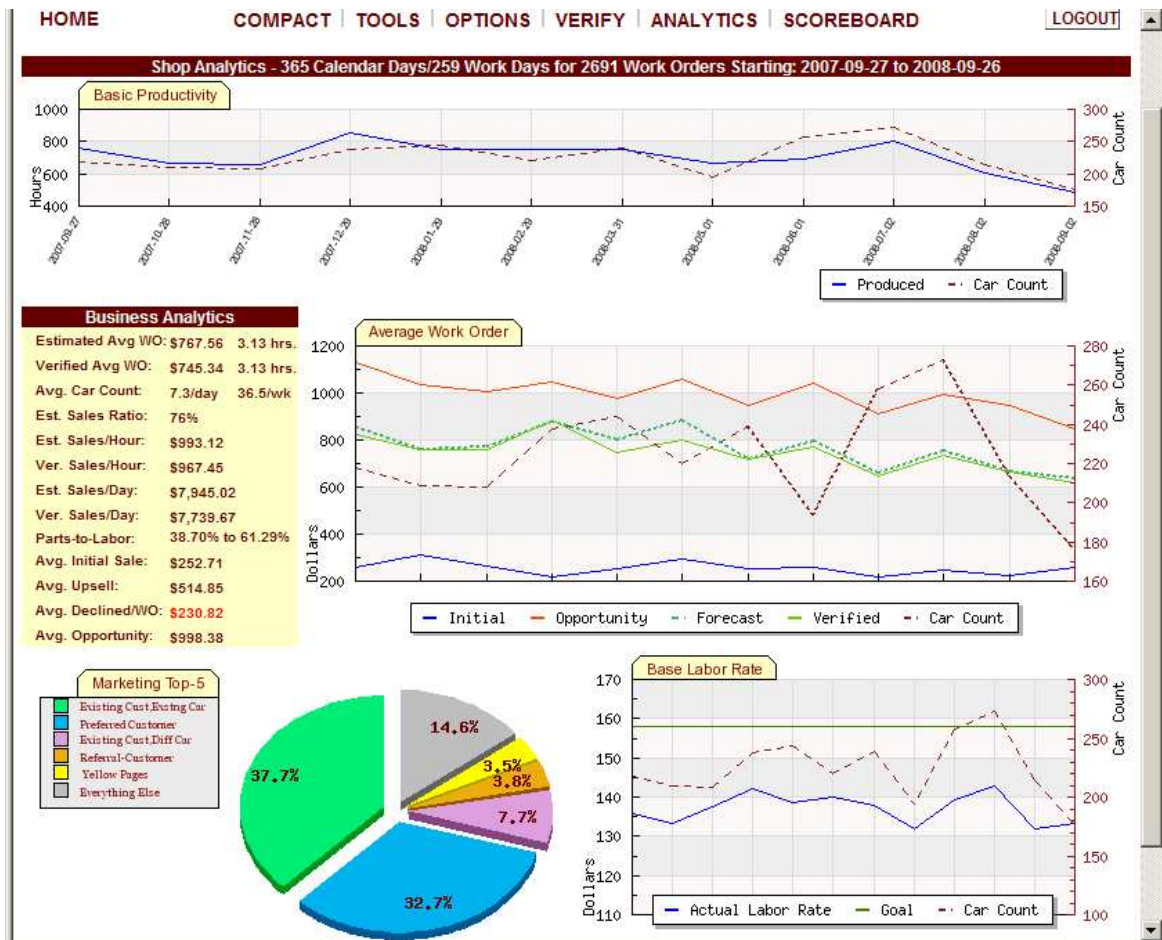
BUSINESS ANALYTICS compiles the information entered by all your employees to supply you with historical information you can use to analyze the health of your business within the time frame selected. If work orders are not verified, then the MARKETING TOP-5 and BASE LABOR RATE chart reports will be unavailable.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

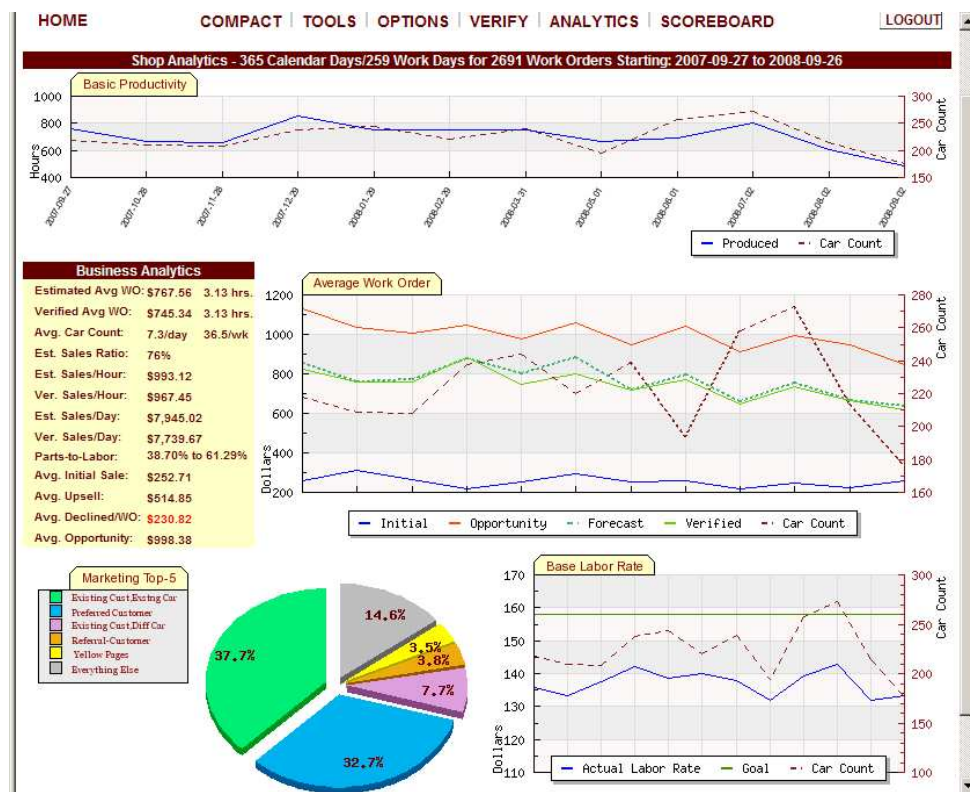
PARTS-TO-LABOR shows for every \$1 spent what percentage are parts and what percentage is labor.

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

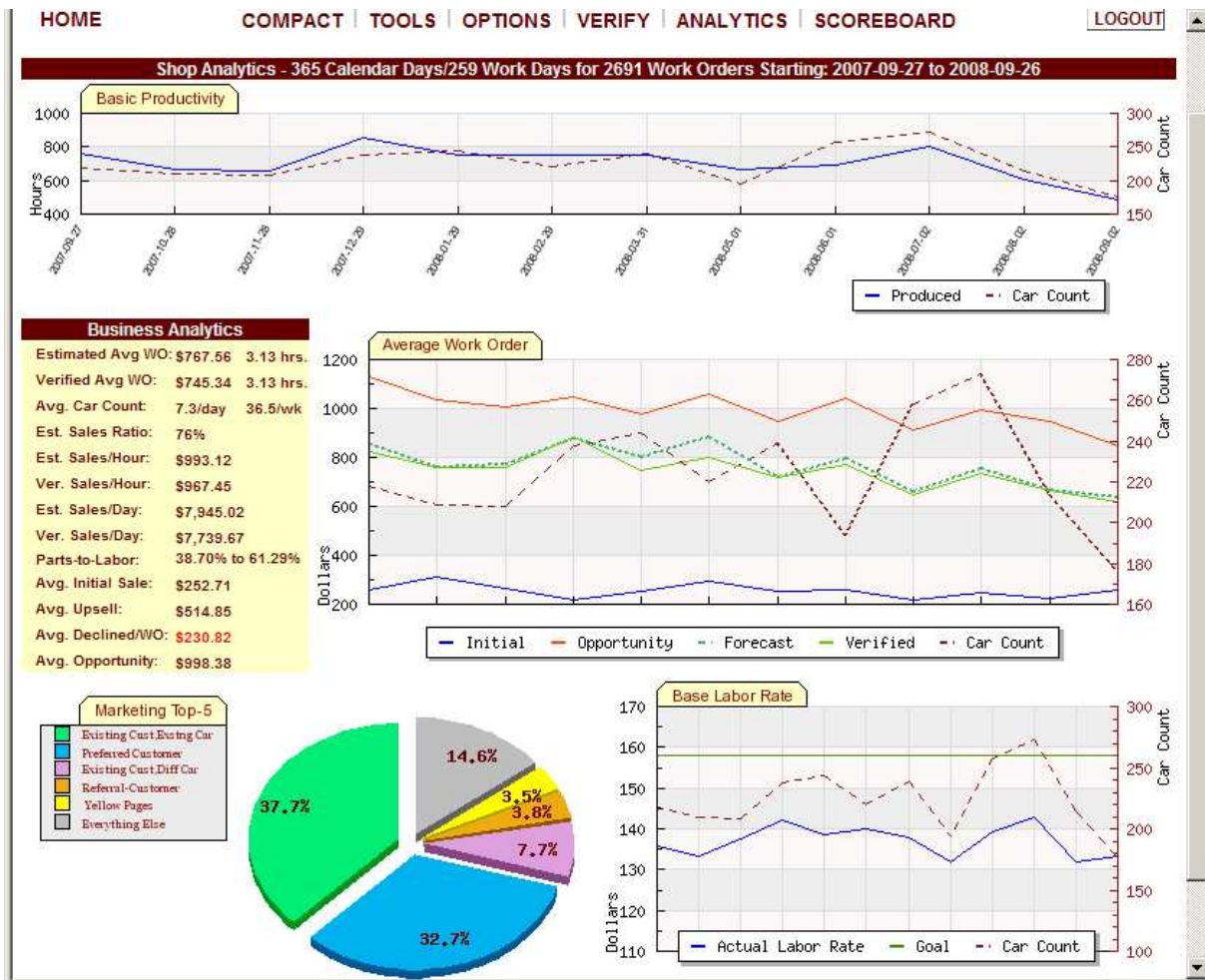
AVERAGE DECLINED WORK ORDER is the average declined dollar amount per work order. Declined dollars will provide you with areas to focus on in your business to capture that lost revenue.

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



Analytics

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.

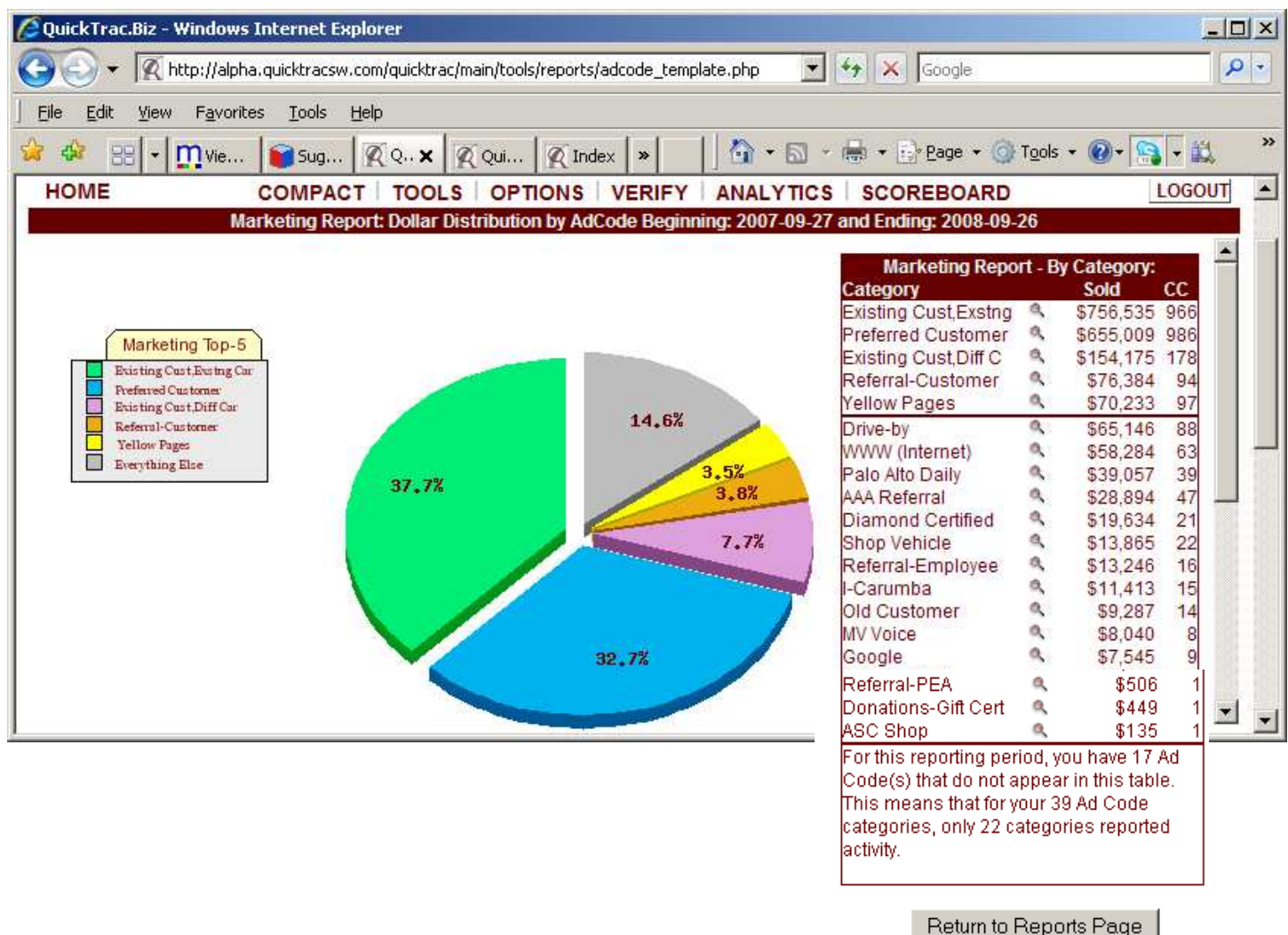
Note: If shop is not verifying, then the Marketing Top-5 pie chart and Base Labor Rate (last two on the bottom of the page) reports will be unavailable.

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.



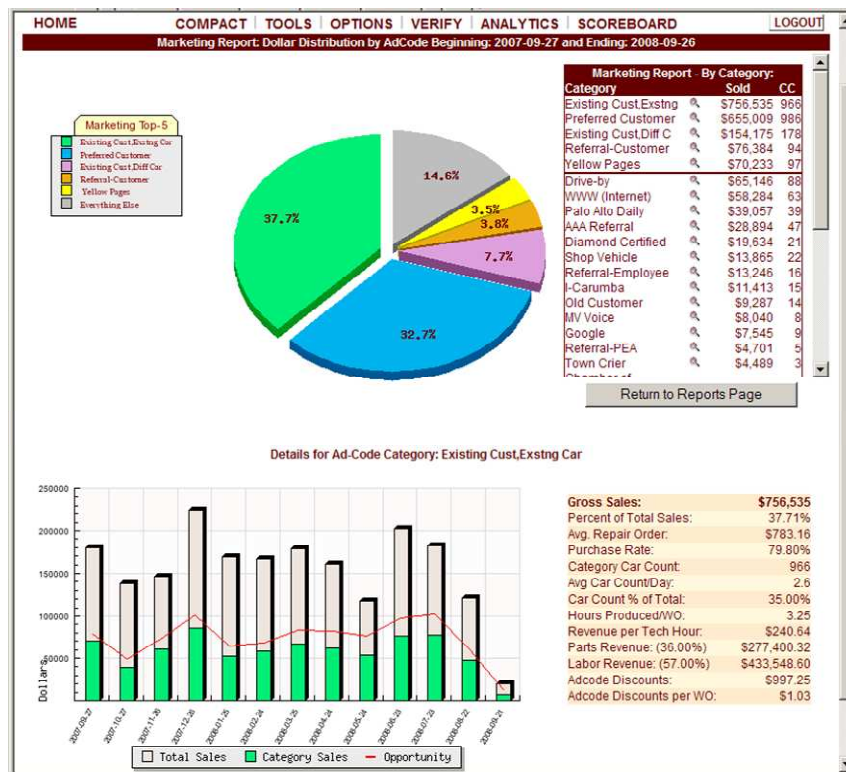
Analytics

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

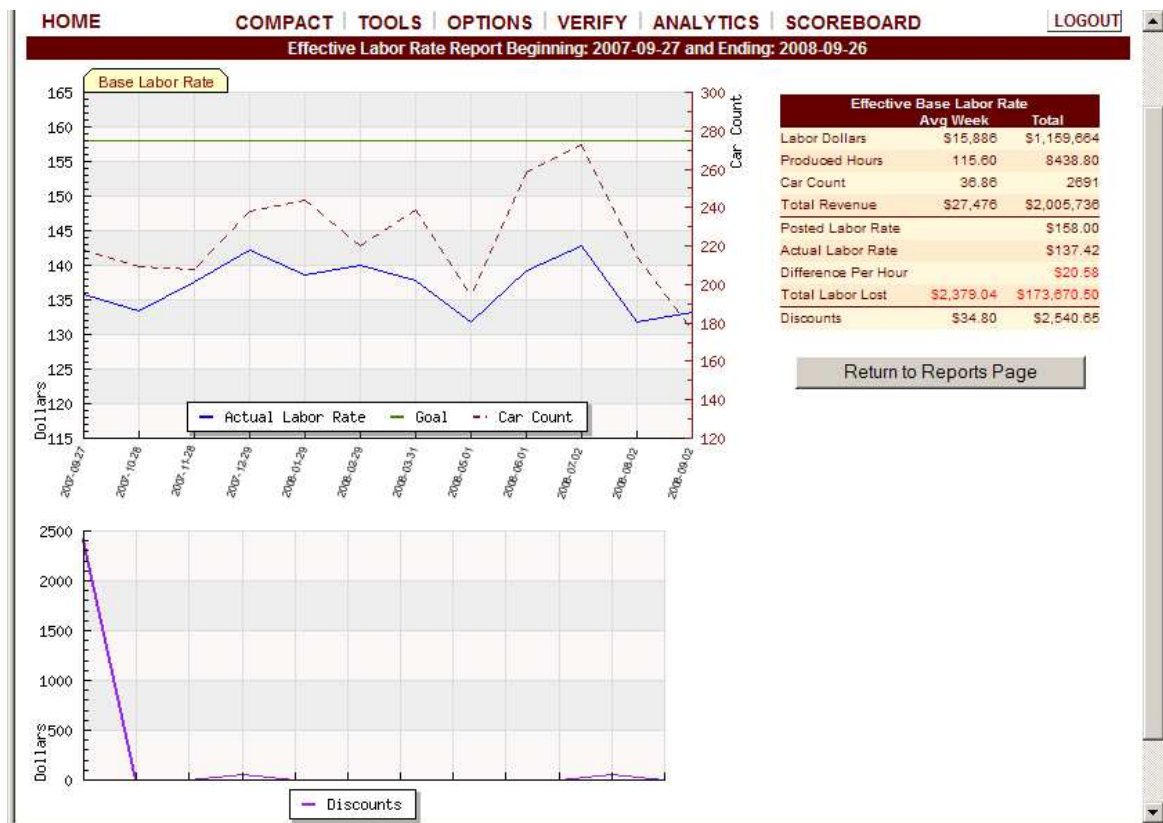
Analytics

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.

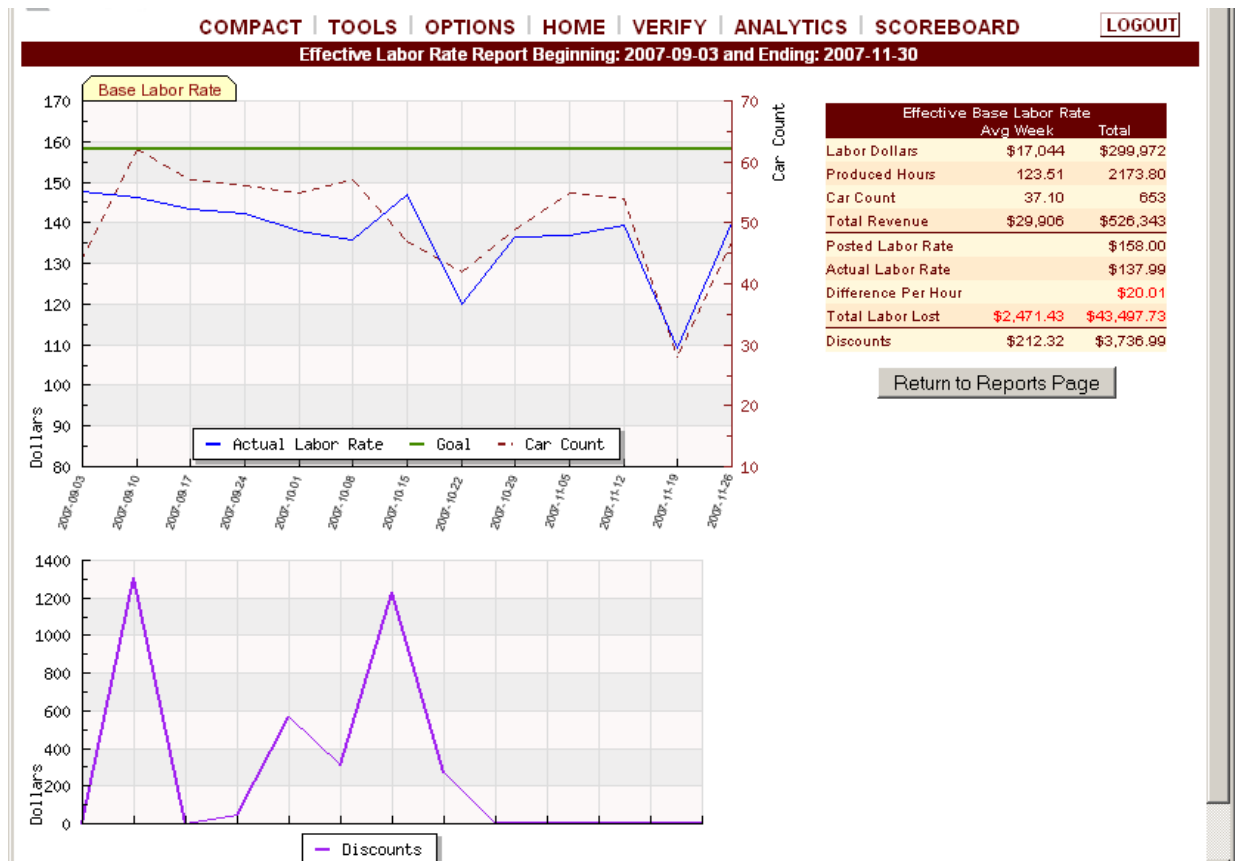
On the right hand side table are the ACTUAL/BASE LABOR RATE details. The first row shows LABOR DOLLARS, PRODUCED HOURS, CAR COUNT, and TOTAL REVENUE. LABOR DOLLARS are the AVERAGE WEEKLY LABOR dollar amount collected and the TOTAL LABOR dollars collected for the time period selected. PRODUCED HOURS are 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.

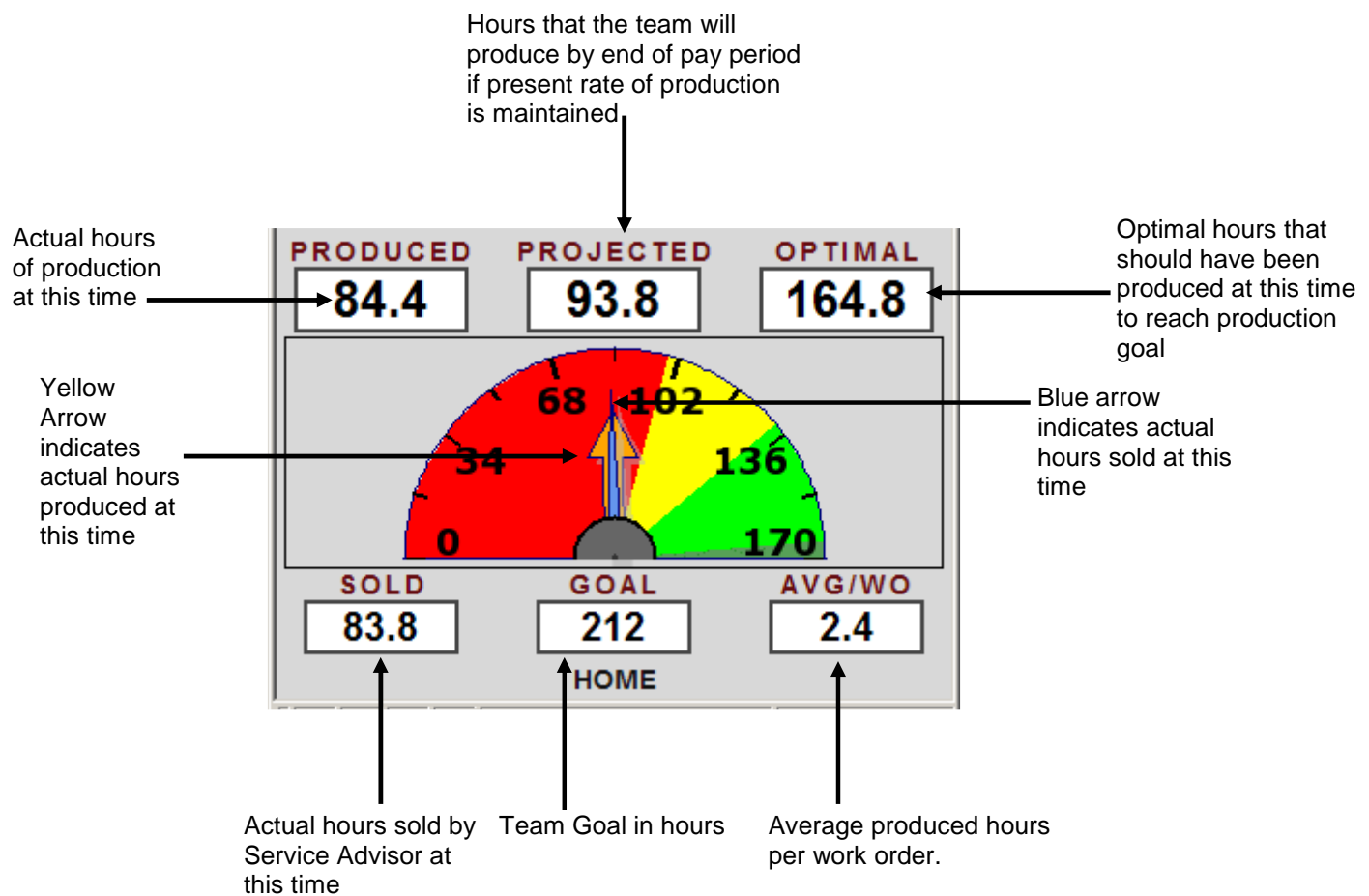
Click on the RETURN TO REPORTS PAGE button when you are ready to view other reports.

Compact View

All figures shown are for a business week

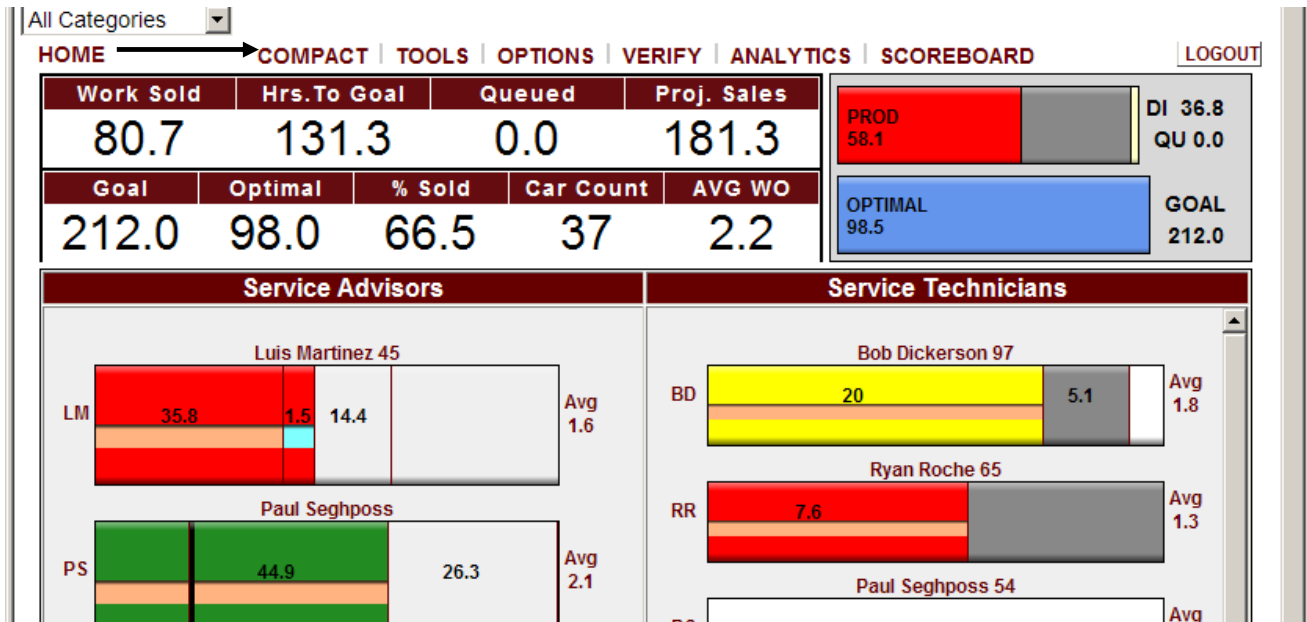
The COMPACT option was designed to give the Owner/Manager a macro view of the progress of the business towards shop's goals and allow for easy access to additional information. It is recommended that Owners/Managers leave the compact view up on their screen to monitor their progress. The Compact View refreshes itself every 5 minutes.

If both arrows are in the green, then things are on track. If they are not, then it is time to look further and solve the problem while you can still affect your bottom line.

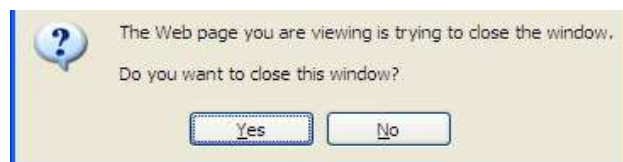


Compact View

While in QuickTrac, click on COMPACT from the menu.



You will see a small dialog box as shown below. Clicking yes will show the compact view only. Clicking no will show both the compact view and the window you currently have open. This dialog box will only appear the first time you use this feature each session.



COMPACT compresses the display and moves it to the upper right hand corner of your monitor for fast reopening and entry of future work orders, and continuously shows the shop's progress.

To reopen the previous window you were using while in QuickTrac; click on HOME at the bottom of the COMPACT VIEW.

