



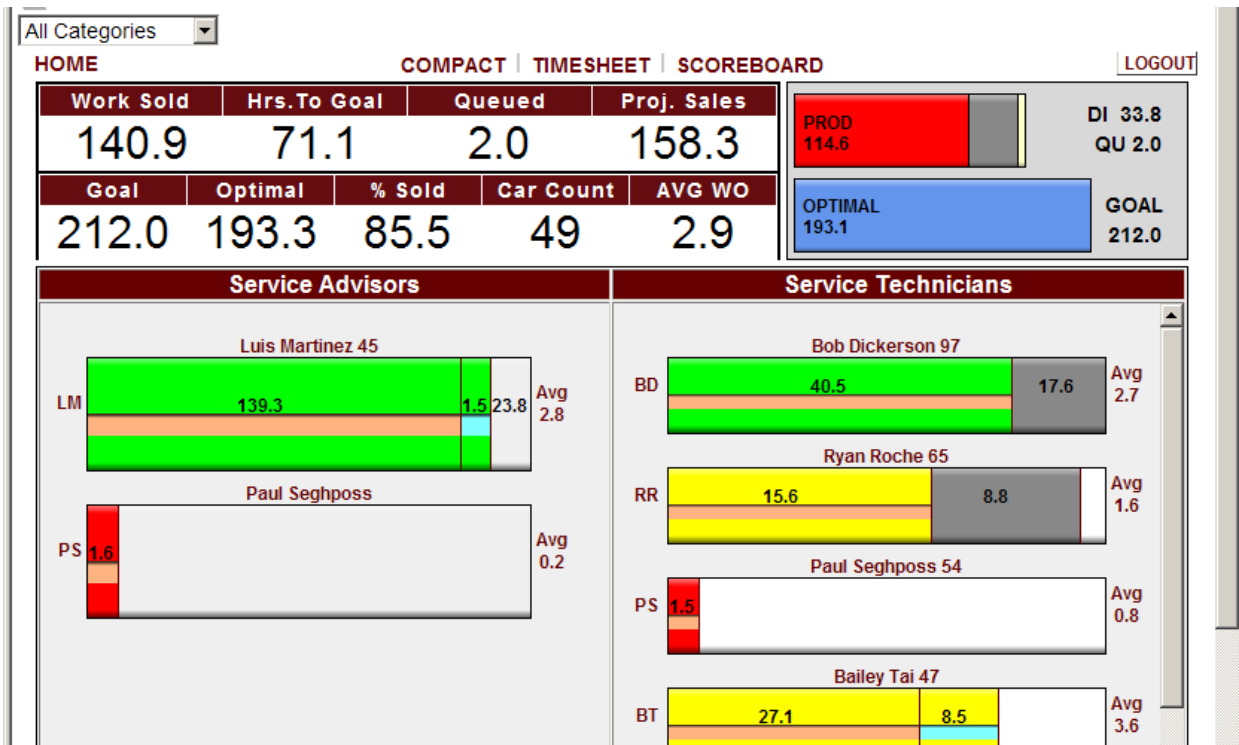
## Service Advisor Main Page

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.

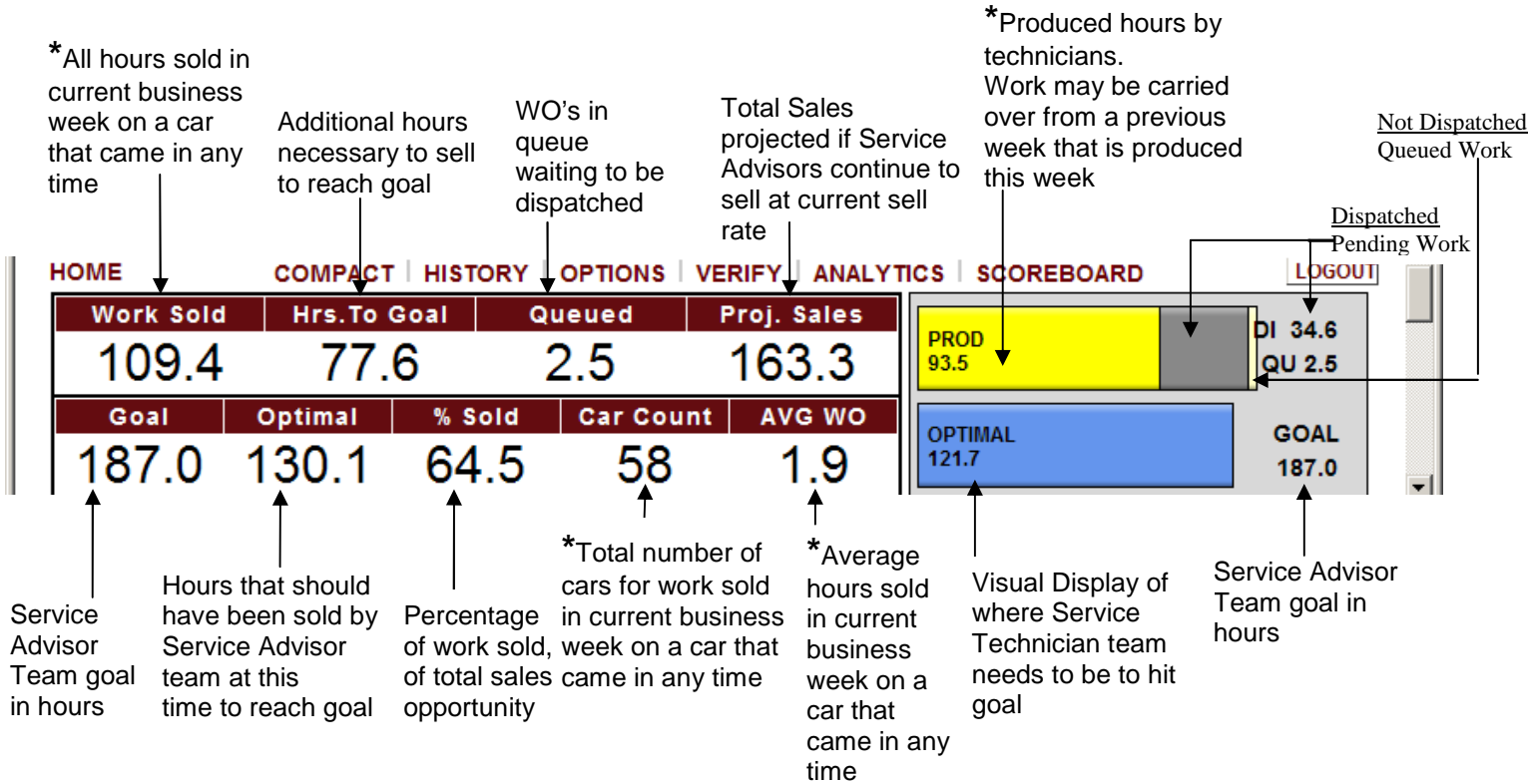
At the bottom of the page there are two links, the DISPLAY HOURS and DISPLAY \$\$\$ links at the bottom of the page. DISPLAY HOURS will display all data in hours. To switch the display and show the data in dollars, click on DISPLAY \$\$\$.



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**\* 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.

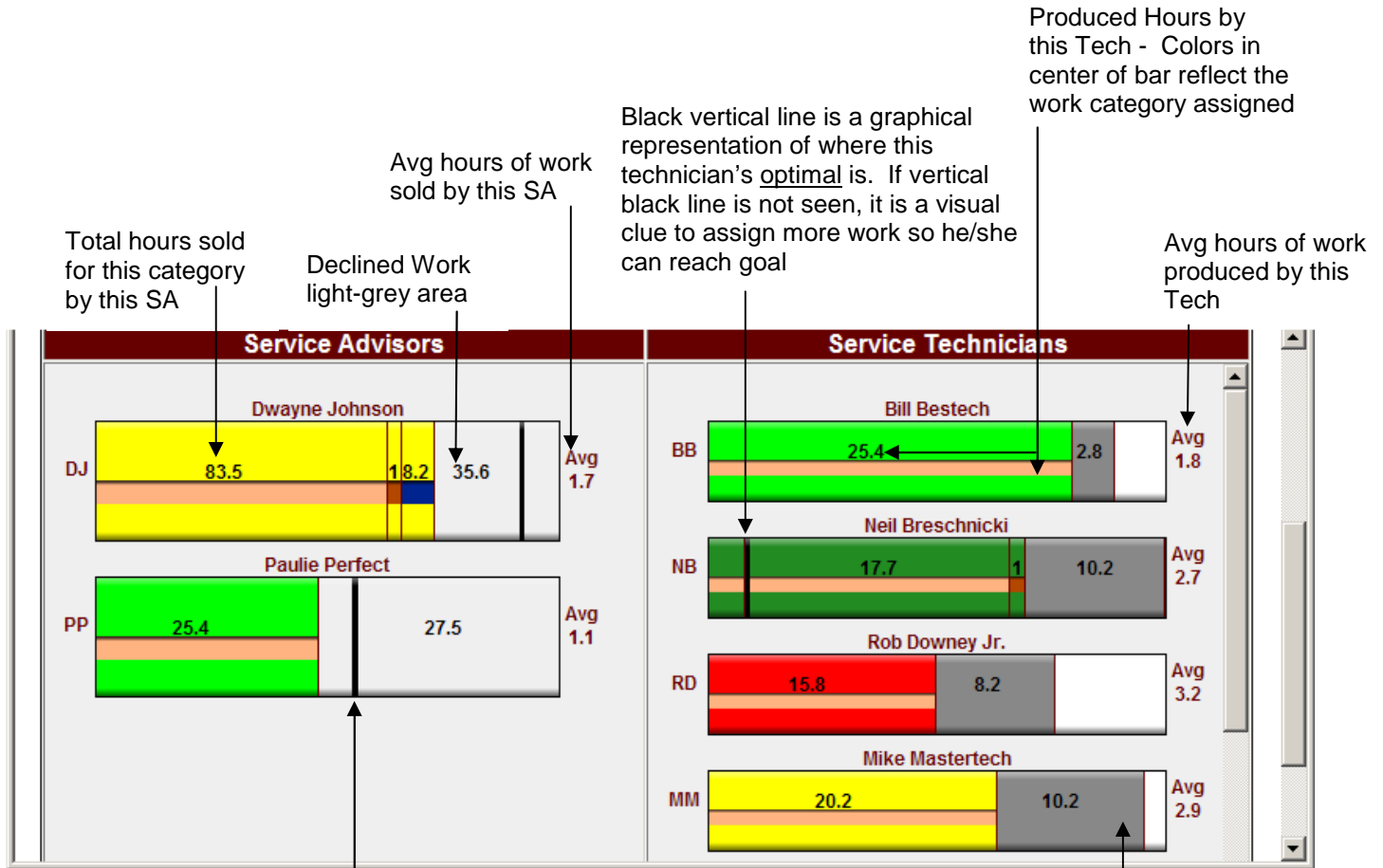
**Note:** If you do not want to see an additional car count added in a current business week for a car count that was used for a previous business week (for work sold in a current business week & previous business week), you will need to mouse over the Car Count box.

\*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.

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Black vertical line is a graphical representation of where this service advisor's optimal is. If vertical black line is not seen, it is a visual clue for this SA to increase his/her sales for goal to be reached

Pending Work dark-grey area

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

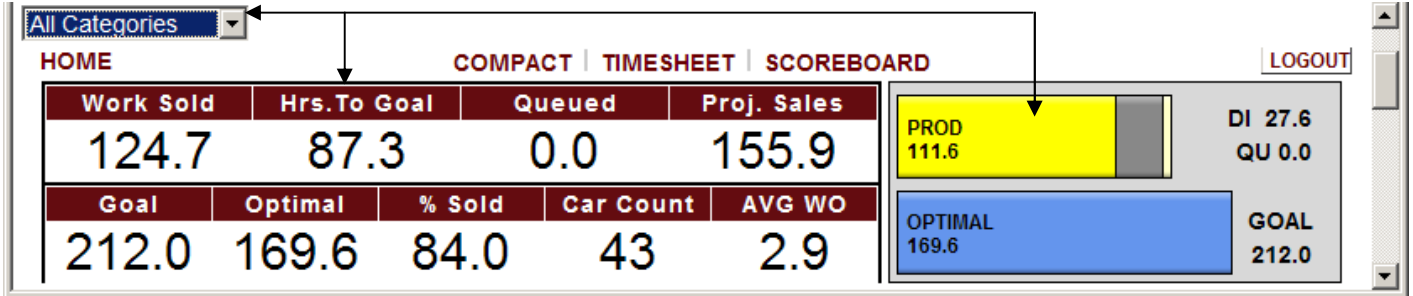
**Note:** Employees that do not show a vertical black line is because their optimal goal has not been met yet. Once employee reaches their optimal goal, their vertical black line will appear at the right hand side and move to the left as he increases past his optimal goal.

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

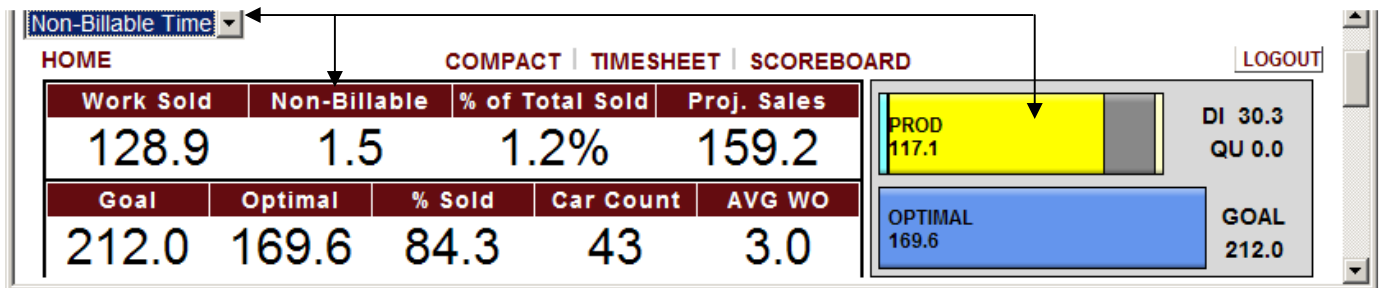
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When a different category is selected from the drop-down box, the category amount is displayed and the color coded category is reflected in the bar graph (See Work Codes document for color category codes.)



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.

