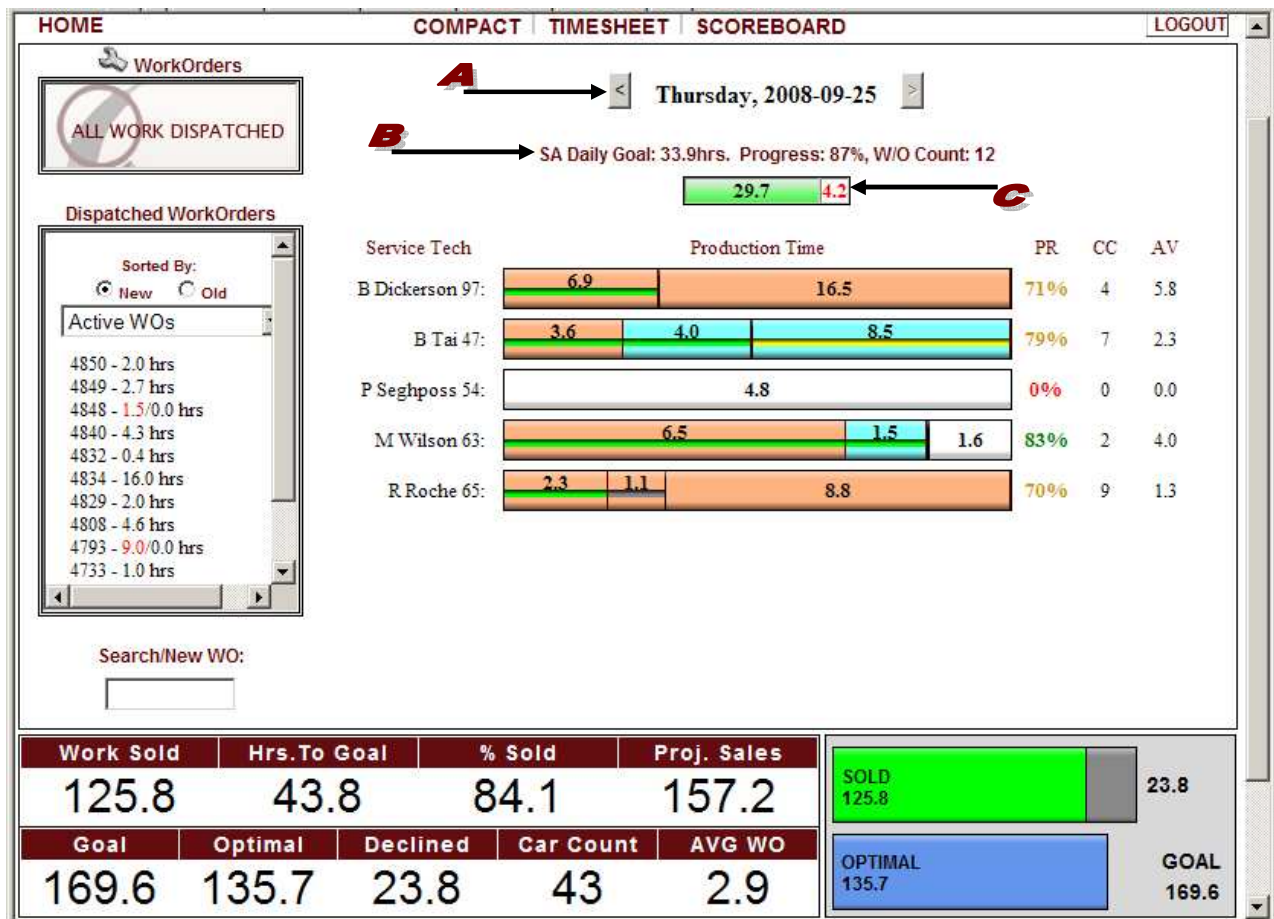


Service Advisor Personal Page

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 is the **B** SERVICE ADVISORS DAILY GOAL HOURS, PROGRESS PERCENTAGE, DAILY 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.

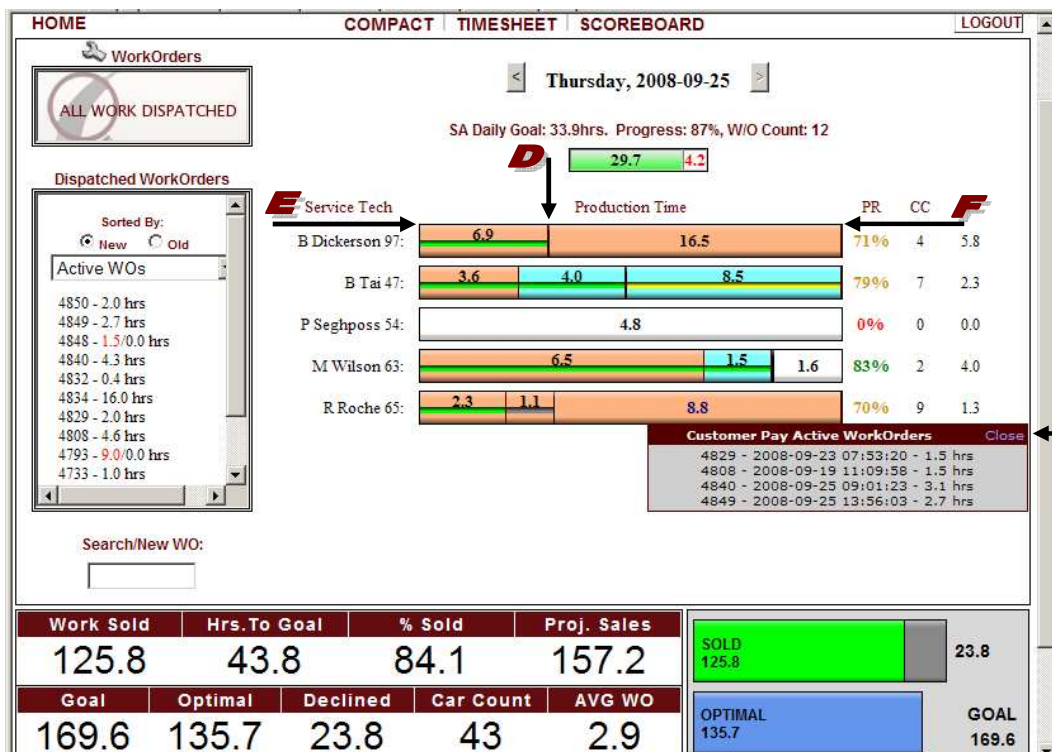
To the RIGHT of the SEPARATOR BAR is **F** TIME ASSIGNED AND NOT PRODUCED yet which is color coded as follows. WHITE represents available time for that day. YELLOW represents aged work orders that have been dispatched for more than two days but not completed. And GREY represents verified time.

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.

WorkOrders

- george1 - 6.0 hrs
- 805120 - 3.0 hrs
- Introl - 3.0 hrs

Dispatched WorkOrders

Sorted By: New Old

- Active WOs
- Completed WOs
- Verified WOs
- Deleted WOs
- Zero WOs
- Created By Me

lly3 - 6.0 hrs

lly2 - 12.0 hrs

lly - 10.0 hrs

5100 - 9.5 hrs

Search/New WO:

Monday, 2008-05-12

SA Daily Goal: 11hrs. Progress: 54%, W/O Count: 1

6.0 / 11

Service Tech	Production Time	PR	CC	AV
B Dickerson 97:	2.8 / 5.0 / 5.0	81%	4	3.2
V deValiant:	9.6	0%	0	0.0
S Man:	9.6	0%	0	0.0
S Man:	9.6	0%	0	0.0

Work Sold	Hrs. To Goal	% Sold	Proj. Sales
6.0	50.4	100.0	30.4
Goal	Optimal	Declined	Car Count
56.4	11.2	0.0	1

AVG WO	GOAL
6.0	56.4
OPTIMAL 11.2	

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.

WorkOrders

- george1 - 6.0 hrs
- 805120 - 5.0 hrs
- lizali - 3.0 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:

Tuesday, 2008-05-13

SA Daily Goal: 5.2hrs. Progress: 115%, W/O Count: 1

+0.8

Service Tech	Production Time	PR	CC	AV
B Dickerson 97:	19.5	203%	3	6.5
V deValiant:	10.0 / 4.0	104%	3	4.6
S Man:	5.0 / 4.6	52%	1	5.0
S Man:	3.0 / 4.0 / 4.0	72%	3	3.6

Customer Pay 48-hr WorkOrders [Close](#)

sall9 - 2008-05-08 13:04:42 - 4.0 hrs

Work Sold	Hrs.To Goal	% Sold	Proj. Sales
6.0	22.2	84.5	23.1
Goal	Optimal	Declined	Car Count
28.2	7.3	1.1	2

SOLD 6.0	1.1
OPTIMAL 7.3	GOAL 28.2

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.

WorkOrders Tuesday, 2008-05-13

SA Daily Goal: 5.2hrs. Progress: 115%, W/O Count: 1
+0.8

Service Tech	Production Time	PR	CC	AV
B Dickerson 97:	19.5	203%	3	6.5
V deValiant:	10.0	104%	3	4.6
S Man:	5.0	52%	1	5.0
S Man:	3.0	72%	3	3.6

Customer Pay 48-hr WorkOrders
sally9 - 2008-05-08 13:04:42 - 4.0 hrs

Work Sold	Hrs.To Goal	% Sold	Proj. Sales
6.0	22.2	84.5	23.1
Goal	Optimal	Declined	Car Count
28.2	7.3	1.1	2

AVG WO	GOAL
3.0	28.2

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.

WorkOrders Return to Bar Graph View

Create Upsell

W/O #: llygli **C** E D Q Date Event

Ad Code: Shop Vehicle **D**

Sold By: George Michaels

Category: Customer Pay

Source:

Brand:

Sold Hours:

Sold Dollars:

Declined Hours:

Declined Dollars:

Save Upsell

Dispatch Work - 3 hours available


W/O #	Date	Event
2008-05-09	2008-05-09	WO Create for 5.0 hrs
2008-05-09	2008-05-09	Initial Sale for 1.0 hrs
2008-05-09	2008-05-09	Upsell for 1.0 hrs
2008-05-09	2008-05-09	Upsell for 5.0 hrs
2008-05-09	2008-05-09	Dispatched 1.0 hrs
2008-05-09	2008-05-09	Dispatched 3.0 hrs
2008-05-09	2008-05-09	Work Produced - 0.5 hrs
2008-05-09	2008-05-09	Work Produced - 1.0 hrs
2008-05-13	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	GOAL
3.0	28.2

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.

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

Summary Table:

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

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

History:

Date	Event
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

Summary Table:

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

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

WorkOrders

- george1 - 6.0 hrs
- 805120 - 5.0 hrs
- liverki - 3.0 hrs

Tuesday, 2008-05-13

SA Daily Goal: 5.2hrs. Progress: 115%, W/O Count: 1

+0.8

Dispatched WorkOrders

Sorted By: New Old

Active WOs

- sall17 - 8.0 hrs
- lrygli - 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:

Service Tech	Production Time	PR	CC	AV
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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

SOLD 6.0	1.1
OPTIMAL 7.5	GOAL 28.2

The diagram illustrates the following relationships between dashboard metrics and their business interpretations:

- Work Sold (6.0):** All Hours sold by Service Advisor at this point.
- Hrs.To Goal (22.2):** Additional hours necessary to sell to reach personal goal.
- % Sold (84.5):** Percentage of work sold, from this Service Advisor's total sales opportunity.
- Proj. Sales (22.6):** Total Sales projected if Service Advisor continues to sell at current sell rate.
- Goal (28.2):** Service Advisor goal in hours.
- Optimal (7.5):** Hours that should have been sold by Service Advisor at this time to reach goal.
- Declined (1.1):** Total Hours not sold by Service Advisor at this time.
- Car Count (2):** Total amount of cars this SA has worked on at this time.
- AVG WO (3.0):** Average hours sold per work order.
- SOLD (6.0):** Sold hours by Service Advisor at this point.
- OPTIMAL (7.5):** Visual Display of where Service Technician needs to be to hit goal.
- GOAL (28.2):** Service Advisor goal in hours.
- 1.1:** Unsold hours by Service Advisor at this time.

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