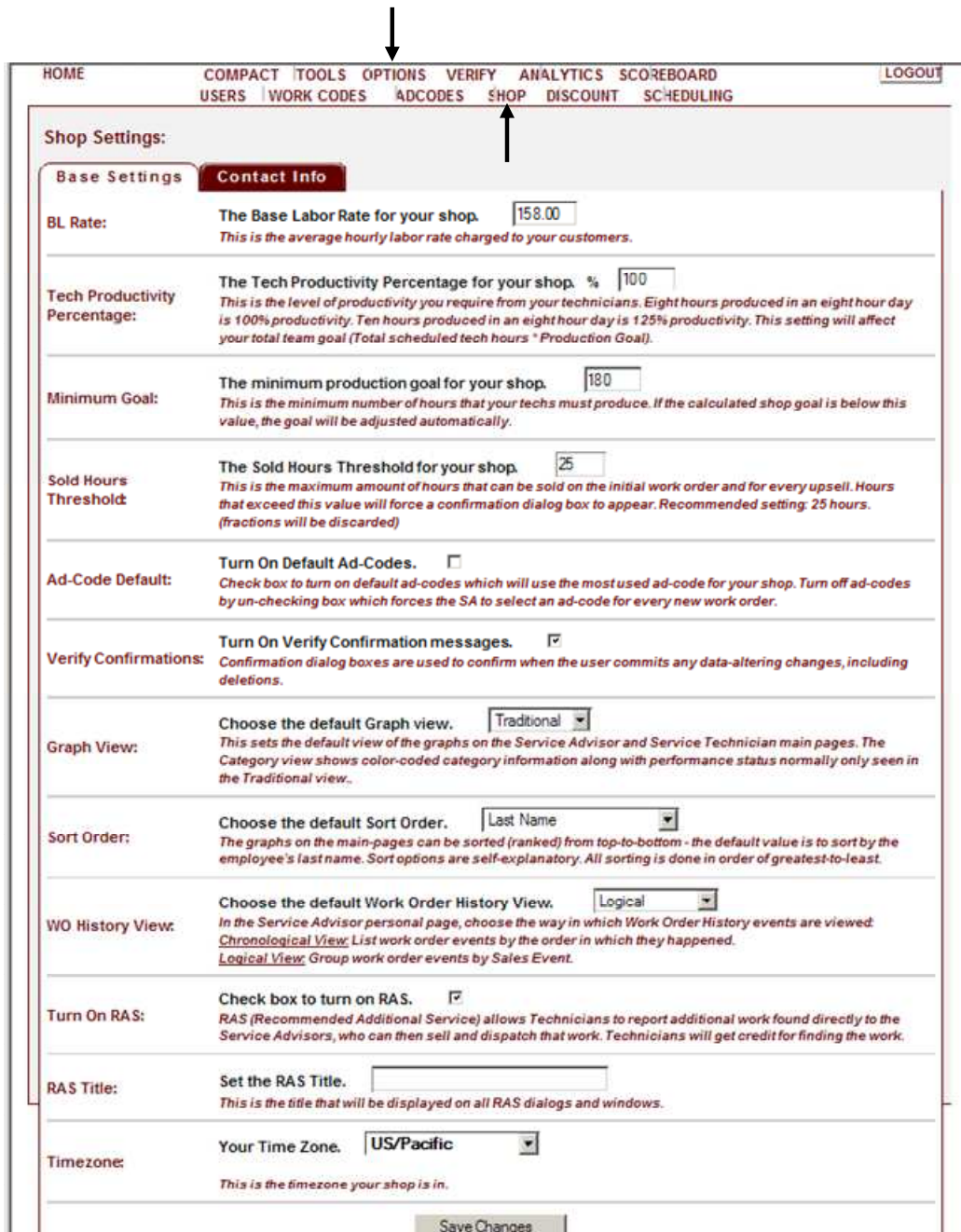


Shop Settings

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.



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

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.

Turn On RAS: Check box to turn on RAS.
RAS (Recommended Additional Service) allows Technicians to report additional work found directly to the Service Advisors, who can then sell and dispatch that work. Technicians will get credit for finding the work.

RAS Title: Set the RAS Title.
This is the title that will be displayed on all RAS dialogs and windows.

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

Save Changes

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.

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

Shop Settings:

Base Settings Contact Info

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. % 100
*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. 180
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.

Turn On RAS: Check box to turn on RAS.
RAS (Recommended Additional Service) allows Technicians to report additional work found directly to the Service Advisors, who can then sell and dispatch that work. Technicians will get credit for finding the work.

RAS Title: Set the RAS Title.
This is the title that will be displayed on all RAS dialogs and windows.

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

Save Changes

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).

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

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)

COMPACT TOOLS OPTIONS HOME VERIFY ANALYTICS SCOREBOARD LOGOUT

WorkOrders

Return to Bar Graph View

[Create Upsell]

W/O #: 4754

Ad Code: Preferred Customer

Sold By: Luis Martinez 45

Category: Customer Pay

Source:

Brand:

Tech Credited: Select Tech

Sold Hours:

Sold Dollars:

Declined Hours:

Declined Dollars:

Save Upsell

History:

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

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:

[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).

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

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.

COMPACT TIMESHEET HOME LOGOUT

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:

Return to Bar Graph View

W/O # 104 Ad Code: Select Ad-Code History: E D Date Event

New Work Order
Sold Work
Hours: Dollars: Sold By: Richard Taylor
Unsold Work
Hours: Dollars: Create WO
Dispatch Work To: NET 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	GOAL 60
OPTIMAL 21.1		

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.

Recommended Additional Services (RAS) is an option that allows the service technicians to record found work and present it to the service advisors. If RAS is an option the shop would like to use, simply check mark the box option "TURN ON RAS".

Note: see RAS document for complete description on how to use.

The RAS TITLE option allows the shop to customize the title "Recommended Additional Services" to something familiar to the shop.

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

The screenshot shows a web form titled "Shop Settings" with several sections. On the left side, seven black arrows point to the following fields:

- Verify Confirmations:** A checkbox labeled "Turn On Verify Confirmation messages." which is checked. Below it is a red italicized note: "Confirmation dialog boxes are used to confirm when the user commits any data-altering changes, including deletions."
- Graph View:** A dropdown menu currently set to "Traditional". Below it is a red italicized note: "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:** A dropdown menu currently set to "Last Name". Below it is a red italicized note: "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:** A dropdown menu currently set to "Logical". Below it is a red italicized note: "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."
- Turn On RAS:** A checkbox labeled "Check box to turn on RAS." which is checked. Below it is a red italicized note: "RAS (Recommended Additional Service) allows Technicians to report additional work found directly to the Service Advisors, who can then sell and dispatch that work. Technicians will get credit for finding the work."
- RAS Title:** A text input field with the placeholder text "Set the RAS Title." Below it is a red italicized note: "This is the title that will be displayed on all RAS dialogs and windows."
- Timezone:** A dropdown menu currently set to "US/Pacific". Below it is a red italicized note: "This is the timezone your shop is in."

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

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.

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

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"/>	<input type="button" value="Save Changes"/>
State: <input type="text" value="California"/>	
Zip Code: <input type="text" value="94043"/>	

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