

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

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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.

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Item	Value	Item	Value	Item	Value
82.7	158.3	88.4	280.3		
241	70.9	10.8	35	2.4	

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- Nate Smith Nate Smith's Optimal Auto
- Rami Derhy Signal Garage
- Maylon Newton Educational Seminars Institute

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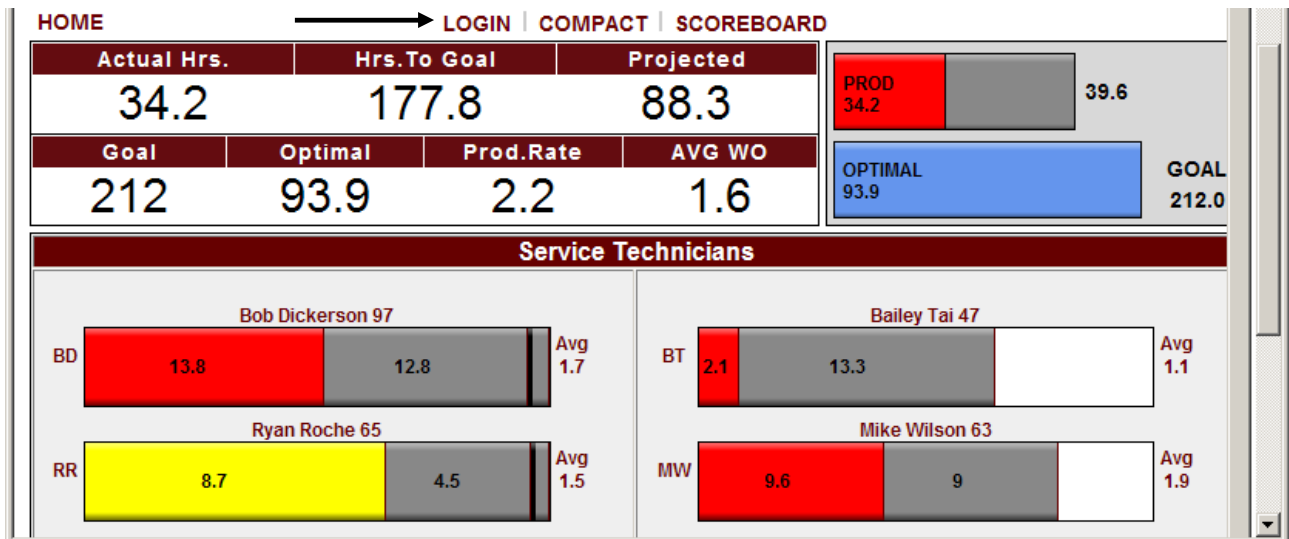
CARS
2007 leading To
The Next level

User Set Up

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



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



User Set Up

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

USERNAME:
 PASSWORD:

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

All Categories ▾

HOME COMPACT TOOLS **OPTIONS** VERIFY ANALYTICS SCOREBOARD LOGOUT

Work Sold	Hrs.To Goal	Queued	Proj. Sales	
55.1	156.9	0.0	142.2	
Goal	Optimal	% Sold	Car Count	AVG WO
212.0	113.7	90.9	25	2.2

PROD 34.2

DI 39.6

QU 0.0

OPTIMAL 94.0

GOAL 212.0

Service Advisors

Luis Martinez 45

LM	<div style="background-color: red; width: 30.4%; height: 20px;"></div> 30.4	Avg 1.4
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Paul Seghposs

PS	<div style="background-color: yellow; width: 24.7%; height: 20px;"></div> 24.7	5.5 Avg 2.5
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Service Technicians

Bob Dickerson 97

BD	<div style="background-color: red; width: 13.8%; height: 20px;"></div> 13.8	<div style="background-color: gray; width: 12.8%; height: 20px;"></div> 12.8 Avg 1.7
----	-----------------------------------------------------------------------------	--------------------------------------------------------------------------------------

Ryan Roche 65

RR	<div style="background-color: yellow; width: 8.7%; height: 20px;"></div> 8.7	<div style="background-color: gray; width: 4.5%; height: 20px;"></div> 4.5 Avg 1.5
----	------------------------------------------------------------------------------	------------------------------------------------------------------------------------

Paul Seghposs 54

PS	<div style="background-color: white; width: 0%; height: 20px;"></div>	Avg 0.0
----	-----------------------------------------------------------------------	---------

Bailey Tai 47

BT	<div style="background-color: red; width: 2.1%; height: 20px;"></div> 2.1	<div style="background-color: gray; width: 13.3%; height: 20px;"></div> 13.3 Avg 1.1
----	---------------------------------------------------------------------------	--------------------------------------------------------------------------------------

User Set Up

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

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

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

User Manager:

Add User

Emp. Id: Type:

First Name:

Last Name:

Login:

Password:

Confirm 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

7a) 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.

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7b) 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”.

The screenshot shows the QuickTrac User Manager interface. At the top right, it says "Auto Geniuses 09/25/08 User: Bullard" with a "LOGOUT" button. A navigation menu includes "HOME", "COMPACT", "TOOLS", "OPTIONS", "VERIFY", "ANALYTICS", "SCOREBOARD", "USERS", "WORK CODES", "ADCODES", "SHOP", "DISCOUNT", and "SCHEDULING". The "User Manager" section is divided into two panes. The left pane, titled "Edit User", contains fields for "Emp. Id:" (540), "Type:" (Manager), "Active:" (checked), "Inactive:" (unchecked), "First Name:" (Peter), "Last Name:" (Perfect), and "Login:" (peterp). Below these fields is a link "Click to Change Password" with an arrow pointing to it, and buttons for "Update User", "Delete User", and "Cancel". The right pane, titled "User List", shows a table with columns "ID", "NAME", "TYPE", and "STATUS". The table lists several users, including Peter Perfect (ID 540, MGMT, A).

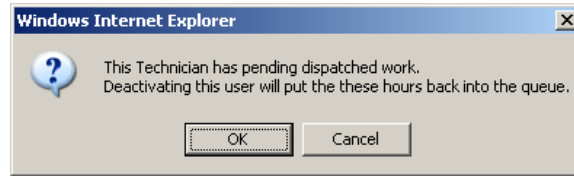
ID	NAME	TYPE	STATUS
64	Barbara Walters	MGMT	A
0	Default Admin	MGMT	A
540	Peter Perfect	MGMT	A
332	Sally Garbutt	MGMT	A
2	Susan Stunning	MGMT	A
333	Cecil Bullard	OWNR	A
1	Larry Moore	OWNR	A
45	Dwayne Johnson	SRVA	A
541	Paulie Perfect	SRVA	A
97	Bill Bestech	TECH	A
63	Mike Mastertech	TECH	A
65	Neil Breschnicki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

7c) After entering the new password and confirming it, click on the UPDATE USER button.

This screenshot is identical to the previous one but shows the "Edit User" form with additional fields for "Password:" and "Confirm Password:". Three arrows point to these fields: one to the "Password:" field, one to the "Confirm Password:" field, and one to the "Update User" button.

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.



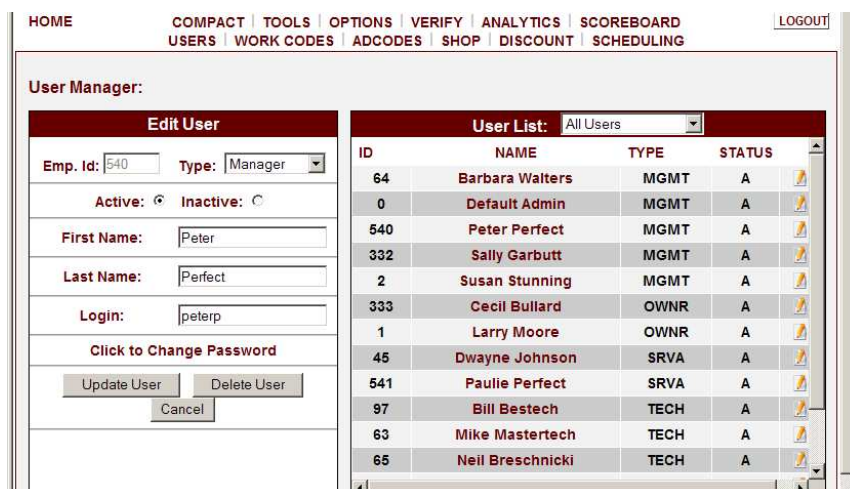
7d) To update an employee's first name, last name, or login, first click on the name of the person you want to update. Next, enter the modifications and then click on the UPDATE USER button for user to be updated. Employee ID's cannot be edited and cannot be re-used by another employee. Employee Type cannot be changed for a Service Advisor or Technician if work is already tied to that employee.

7e) 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.

7f) Use the CANCEL button if you need to disregard any modifications you have started.



The screenshot shows a web application interface for "User Manager". At the top, there are navigation links: HOME, COMPACT, TOOLS, OPTIONS, VERIFY, ANALYTICS, SCOREBOARD, USERS, WORK CODES, ADCODES, SHOP, DISCOUNT, SCHEDULING, and a LOGOUT button. The main content area is divided into two sections. On the left is the "Edit User" form, and on the right is the "User List" table.

Edit User Form:

- Emp. Id: 540
- Type: Manager
- Active: Inactive:
- First Name: Peter
- Last Name: Perfect
- Login: peterp
- Buttons: Update User, Delete User, Cancel

User List Table:

ID	NAME	TYPE	STATUS
64	Barbara Walters	MGMT	A
0	Default Admin	MGMT	A
540	Peter Perfect	MGMT	A
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