



## 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.

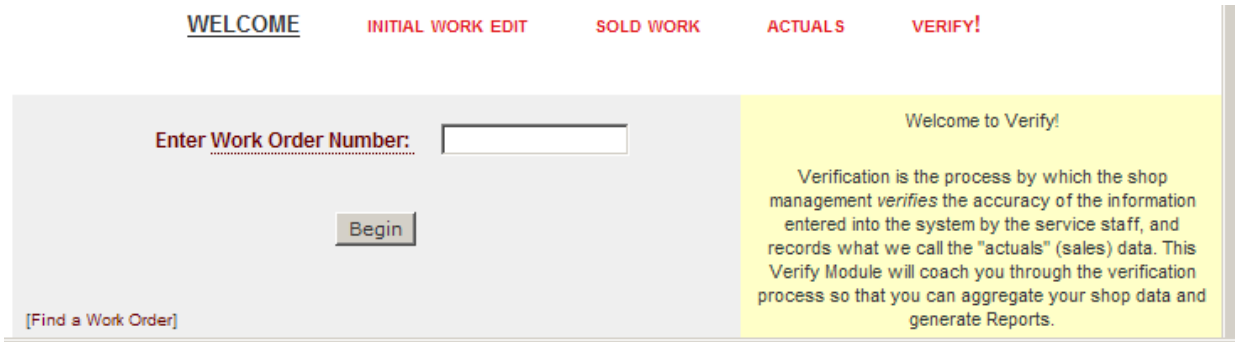
**Note:** Only verified work appears in Analytics. You are not required to enter actuals to verify a work order but it is highly recommended. Without actuals a comparison of projected to actual cannot be done in the Analytics. This comparison is an important key number in determining the health of the 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.

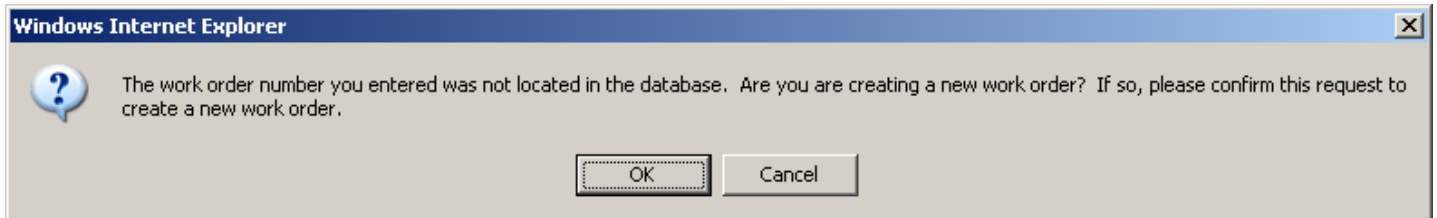
# Verify

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 are navigation tabs: 'WELCOME' (underlined), 'INITIAL WORK EDIT', 'SOLD WORK', 'ACTUALS', and 'VERIFY!'. Below the tabs, on the left, is a form with the label 'Enter Work Order Number:' followed by a text input field and a 'Begin' button. A link '[Find a Work Order]' is located at the bottom left. 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.'

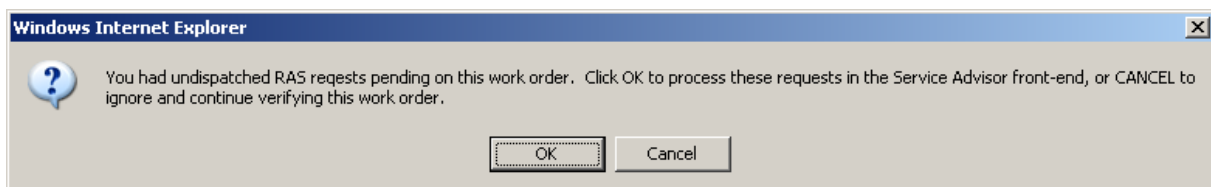
If the work order is a new work order number you will see a dialogue box that lets you know you are creating a new work order and to either confirm or cancel the request.



**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.

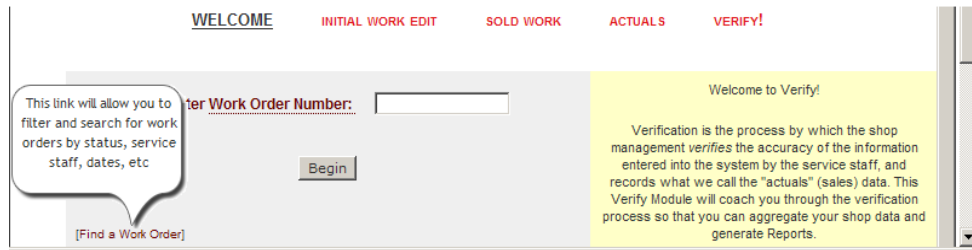
If you elect to process the pending RAS requests (by clicking the OK button), verification will take the user back to the service advisor page, to the RAS detail for that particular work order.

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



# Verify

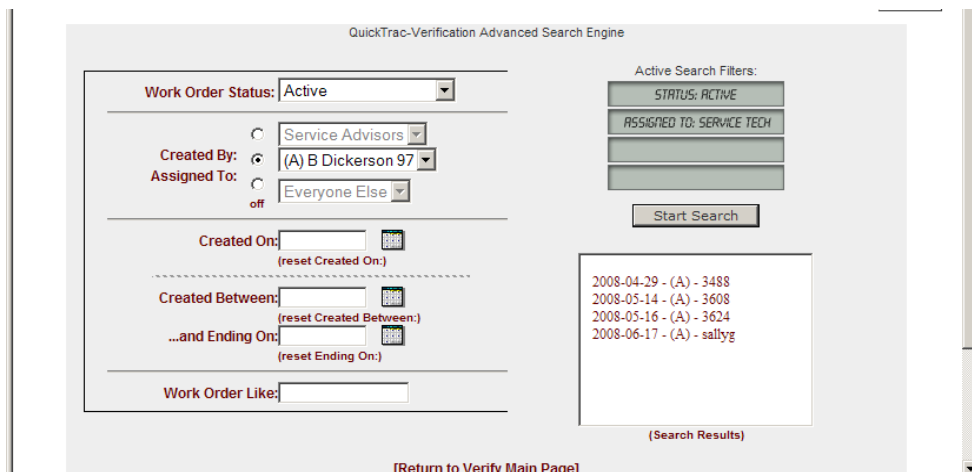
The FIND A WORK ORDER link allows you to find work orders using QuickTrac's search filters.



The 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.”



## 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.

Work Order Status: Active

Created By: (A) B Dickerson 97

Assigned To: Everyone Else

Created On: (reset Created On:)

Created Between: (reset Created Between:)

...and Ending On: (reset Ending On:)

Work Order Like:

STATUS: ACTIVE

ASSIGNED TO: SERVICE TECH

Start Search

2008-04-29 - (A) - 3488  
2008-05-14 - (A) - 3608  
2008-05-16 - (A) - 3624  
2008-06-17 - (A) - sallyg

(Search Results)

[Return to Verify Main Page]

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.

QuickTrac™

Sallys Shop  
03/27/09  
User: Sally  
LOGOUT

HOME COMPACT HISTORY OPTIONS VERIFY ANALYTICS SCOREBOARD

WELCOME → INITIAL WORK EDIT SOLD WORK ACTUALS VERIFY

Click on the Work Order number to edit it.

Work Order Number: sally3

Date Created: 2009-03-22

Ad-Code: Existing customer

Delete Work Order Continue...

Click on actual work order number (sally3) to edit WO#

Edit Header Help

allows you to update the work order header information.

- The work order number is a 4-16 digit alphanumeric 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.
- You may also adjust the ad-code which is used in reports to help you to determine effective advertising strategies.

## Verify

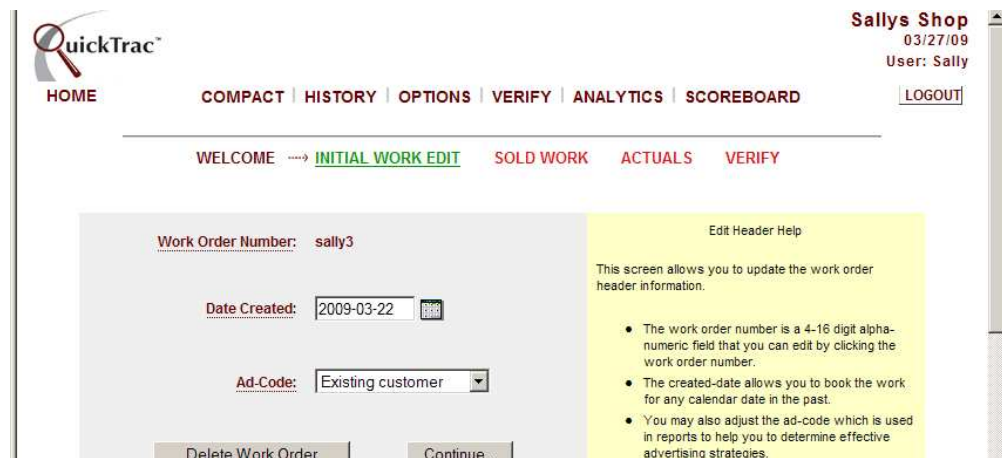
The edit work order number dialog box will appear as shown below. To confirm that you want to edit the old work order number to a new one, enter the new work order number and click on the SAVE CHANGES button. Or you can back out of the edit screen by clicking on the CANCEL EDIT button.



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.



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



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](#)

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

**Work Order:  
sally02**

 Note
  Add Sale

Sold: 5.00  
 HOURS: 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			

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

Sold: 5.00  
 HOURS: 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."

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			

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!

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

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

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.

The screenshot displays the 'VERIFY' screen in the Auto Geniuses software. At the top right, it shows the user 'Moore' and the date '09/25/08'. A navigation menu includes 'IMPACT', 'TOOLS', 'OPTIONS', 'VERIFY', 'ANALYTICS', and 'SCOREBOARD'. A breadcrumb trail shows 'HOME' -> 'INITIAL WORK EDIT' -> 'SOLD WORK' -> 'ACTUALS' -> 'VERIFY!'. A 'LOGOUT' button is also present.

A callout box titled 'SUMMARY:' provides the following data:

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

The main work order details are:

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

A list of charges is shown on the left:

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

A yellow highlighted box contains instructions for entering actual dollar amounts:

- 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.)

A 'Continue...' button is located at the bottom center of the screen.

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.