



Work Codes

WORK CODES are accessed under the OPTIONS menu. Work Categories are completely shop-configurable and are assigned when work is sold in order to track the productivity for each category over time. There can be a maximum of twelve work CATEGORIES. The program allows up to two additional levels of sub-categories (SOURCE and BRAND) beneath the Category root level which are virtually unlimited in number. For example, in the CATEGORY “Customer Pay”, you may wish to add a SOURCE of “Tire” with the BRAND as “Goodyear” and “Michelin”.

The first level of default work codes is represented by the CATEGORY. New shops are given four base categories (*two of these categories are set to active for dealerships and inactive for independent shops.) Independent shops can activate these categories as necessary. An Inactive Category is displayed with a gray background. The following parent categories have the following default color assignments.

Customer Pay (Pastel Orange) – Active for individual shops & dealerships. Customer Pay is Work that will be paid for by the customer when work is completed.

Non-Billable (Teal) - Active for individual shops & dealerships. Non-Billable time is work that is performed but no money is collected from the customer. Any work performed that you pay your staff for that cannot be billed to the customer must show up in the program as non-billable time in order to quickly identify lost sources of revenue and expense trends. This is an important area for creating profitability that is often overlooked in businesses.

***Internal** (Blue) – Active for dealerships

***Mfg Warranty** (Purple) – Active for dealerships

Any categories seen highlighted in green is default for the specific work category and will be seen in the drop down boxes. Any category seen in grey is an inactive category.

The screenshot shows the QuickTrac software interface. At the top, there is a navigation menu with options: HOME, COMPACT, TOOLS, OPTIONS, VERIFY, ANALYTICS, SCOREBOARD, USERS, WORK CODES, ADCODES, SHOP, DISCOUNT, and SCHEDULING. The user is logged in as Sally Shop on 09/29/08. The main section is titled 'Work Categories' and contains three dropdown menus: Category, Source, and Brand. The 'Customer Pay' category is selected, and the 'Tires' source and 'Good Year' brand are highlighted in green. Below the dropdowns are 'New' and 'Edit' buttons for each. At the bottom, there is a section titled 'Active Categories & Colors:' showing color-coded bars for Customer Pay, Non-Billable Time, Internal, and Mfg Warranty.

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A color selection must be specified when creating a new category. When creating a new category, the colors that have already been specified to a category are not displayed. Only the colors that are available to choose from are displayed. Sub-categories Source and Brand will be represented with the same color code as their root category.

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

Edit Category Name:

Code: NBT Name: Non-Billable Time Counts to Goal: Counts to Goal Group Default: Yes Status: Active Inactive Deleted

Choose a Color:

Save Changes

Work Categories

Category: Customer Pay, Non-Billable Time, Internal, Mfg Warranty

Source: Shop Cleanup, Shop Vehicles, On-the-Job Training, Tech Error, Parts Warranty, Repair Equipment/Tools, Install Equipment/Machine, Customer Satisfaction, Marketing/Promotions, No work

Brand: None Selected

Active Categories & Colors:

Category	Source	Color
Customer Pay	Shop Cleanup	Orange
	Shop Vehicles	Orange
	On-the-Job Training	Orange
	Tech Error	Orange
	Parts Warranty	Orange
	Repair Equipment/Tools	Orange
	Install Equipment/Machine	Orange
	Customer Satisfaction	Orange
	Marketing/Promotions	Orange
	No work	Orange
Non-Billable Time	Shop Cleanup	Cyan
	Shop Vehicles	Cyan
	On-the-Job Training	Cyan
	Tech Error	Cyan
	Parts Warranty	Cyan
	Repair Equipment/Tools	Cyan
	Install Equipment/Machine	Cyan
	Customer Satisfaction	Cyan
	Marketing/Promotions	Cyan
	No work	Cyan
Internal	Shop Cleanup	Blue
	Shop Vehicles	Blue
	On-the-Job Training	Blue
	Tech Error	Blue
	Parts Warranty	Blue
	Repair Equipment/Tools	Blue
	Install Equipment/Machine	Blue
	Customer Satisfaction	Blue
	Marketing/Promotions	Blue
	No work	Blue
Mfg Warranty	Shop Cleanup	Pink
	Shop Vehicles	Pink
	On-the-Job Training	Pink
	Tech Error	Pink
	Parts Warranty	Pink
	Repair Equipment/Tools	Pink
	Install Equipment/Machine	Pink
	Customer Satisfaction	Pink
	Marketing/Promotions	Pink
	No work	Pink

The second level of default work codes is represented by the SOURCE. By default, all shops, including dealerships, receive the following Source items, which are linked to the parent category item: NON-BILLABLE time.

- Shop Cleanup
- Shop Vehicles
- On-the-Job Training
- Labor Warranty
- Parts Warranty
- Repair Equipment/Tools
- Install Equipment/Machine
- Customer Satisfaction
- Marketing/Promotions
- No Work

We recommend that you have sources for any and all NON-BILLABLE time. NON-BILLABLE time is an expense that can easily get out of hand.

Tracking and monitoring NON-BILLABLE time will help you control those expenses as well as monitor the quality of your parts suppliers, your customer service staff, and your technicians. You will also know what those loss leaders and giveaways are really costing you. And you will know right now while you can still do something about it. Below are the default NON-BILLABLE SOURCES provided. NON-BILLABLE sources can only be modified while logged in as a Manager or Owner.

Work Codes

Some other examples of Non-Billable Sources that you may want to create for your shop are shown below.

Coupon or promotion: Any coupons or promotions given to the customer

Shop vehicle: Paying technicians to work on shop vehicles

On the job training: Paying a tech a little more because the book time was actually too low

Tech error: Paying technician to repair another technician's work (maybe after firing a tech and his work comes back and has to be fixed by another Technician!)

Parts warranty: Paying technician to redo a job because the part is defective

Install equipment/machinery: Paying technicians to install/repair shop equipment

Customer satisfaction: Paying a technician to do something to make a customer happy

Marketing/promotions: Paying a technician to perform work for free due to a loss leader or giveaway program

Edit Category Name:

Code: Name: Counts to Goal: Counts to Goal Group Default: Yes Status: Active Inactive Deleted

Choose a Color:

Save Changes

Work Categories

Category:	Source:	Brand:
Customer Pay	None Selected	
Non-Billable Time	Customer Satisfaction	
Internal	Coupon Special	
Mfg Warranty	Shop Error	
	Valued Customer	
	Employee	
	Preferred Customer Program	
	Because I said so	

New Edit New Edit New Edit

Active Categories & Colors:

- Customer Pay: [Color swatches]
- Non-Billable Time: [Color swatches]
- Internal: [Color swatches]
- Mfg Warranty: [Color swatches]

Work Codes

The third and final level of work codes is the BRAND. Brands are created to further track the sales of the specified product. For each work code classified at the Brand level, there exists a work code at the Source level. Likewise, for each work code at the Source level, there exists a work code at the Category level.

The Category, Source, and Brand Work Categories are created using the NEW button and can be edited using the EDIT button below each Work Category's box.

The screenshot shows a software interface for editing work categories. At the top is a red header bar labeled "Edit Category Name:". Below it is a form with several fields: "Code:" with the value "NBT", "Name:" with "Non-Billable Time", "Counts to Goal:" with a checkbox labeled "Counts to Goal", "Group Default:" with a checkbox labeled "Yes", and "Status:" with radio buttons for "Active", "Inactive", and "Deleted". Below these fields is a "Choose a Color:" section with a palette of 12 colored swatches. A "Save Changes" button is located below the color palette.

Below the edit form is a section titled "Work Categories" with three columns: "Category:", "Source:", and "Brand:".

- Category:** A list box containing "Customer Pay", "Non-Billable Time", "Internal", and "Mfg Warranty". Below it are "New" and "Edit" buttons.
- Source:** A list box containing "None Selected", "Customer Satisfaction", "Coupon Special", "Shop Error", "Valued Customer", "Employee", "Preferred Customer Program", and "Because I said so". Below it are "New" and "Edit" buttons.
- Brand:** An empty list box. Below it are "New" and "Edit" buttons.

At the bottom of the interface is a section titled "Active Categories & Colors:". It displays four rows, each representing a category and its color swatch. Each swatch is a vertical bar divided into four segments, representing different work statuses: yellow (aged work), green (produced work), and grey (verified work). The categories and their colors are: Customer Pay (orange), Non-Billable Time (cyan), Internal (blue), and Mfg Warranty (pink).

The color for each parent level category can be defined through the edit button. Any color that has already been chosen for a category will disappear from the available palette. A total of twelve colors are available to choose from.

Mousing over each active CATEGORY/COLOR swatch at the bottom of the screen will show its text description. Each of those categories also shows what the category view will look like with aged work (yellow), produced work (green), or verified work (grey).

Work Codes

To update a category, click on the category name and then click on the EDIT button. You will then be able to edit the NBT CODE, NAME, whether the code “COUNTS TO GOAL”, GROUP DEFAULT, or the category’s STATUS.

Edit Category Name:

Code: NBT Name: Non-Billable Time Counts to Goal: Counts to Goal Group Default: Yes Status: Active Inactive Deleted

Choose a Color:

Save Changes

The CODE is used by QuickTrac Software to identify the work code. The Code is required and the maximum amount of characters that can be used for the Code is five.

The NAME of the category you enter will appear in the category drop down list on the Service Advisor page that must be selected when a new work order is created.

Work entered that count towards sales goals “COUNTS TO GOAL” are transactions that represent actual revenue for the shop. Categories that would not be marked as “COUNTS TO GOAL” are transactions that would not represent actual revenue for the shop, e.g. Non-Billable time.

When creating a new category, select the ACTIVE radio button. Use the INACTIVE selection when a category will no longer be used. Inactive codes will appear in the list boxes with a dark gray background and may be edited at a later time by the shop user.

If editing a SOURCE category, you will see the GROUP DEFAULT box. The Group default box marks the selected work code as the default code that appears in the Category’s drop-down list box on the Service Advisor page.

To delete a code, in the STATUS box, select the DELETE radio button. You will be presented with a confirmation dialogue. When a category or a source item is deleted, all sub-categories will also be deleted. Deletion is permanent and cannot be un-done. WORK CATEGORIES marked as deleted will no longer appear in the selection box.

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

USERS | WORK CODES | ADCODES | SHOP | DISCOUNT | SCHEDULING

Edit Source Name:

Code: 13 Name: No work Group Default: Yes Status: Active Inactive Deleted

Save Changes

Work Codes

Categories will only be included in the Work Sold box and on the Produced Bar Graph on the Service Advisor page ONLY IF the “Counts to Goal” option is check marked as shown below. If you do not want the category to count toward work sold such as non-billable work (work that is performed but no money is collected from the customer), then leave unchecked.

Edit Category Name:

Code: OK	Name: Customer Pay	Counts to Goal: <input checked="" type="checkbox"/> Counts to Goal	Group Default: <input checked="" type="checkbox"/> Yes	Status: <input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Deleted
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Choose a Color:

Work Categories

<p>Category:</p> <div style="border: 1px solid gray; padding: 2px;"> Customer Pay Non-Billable Time Internal Mfg Warranty </div> <p style="text-align: center; margin-top: 5px;"><input type="button" value="New"/> <input type="button" value="Edit"/></p>	<p>Source:</p> <div style="border: 1px solid gray; padding: 2px;"> None Selected Tires Batteries Brakes Engine Oil Change Flush Computer Diagnostic Smog Check </div> <p style="text-align: center; margin-top: 5px;"><input type="button" value="New"/> <input type="button" value="Edit"/></p>	<p>Brand:</p> <div style="border: 1px solid gray; height: 100px;"></div> <p style="text-align: center; margin-top: 5px;"><input type="button" value="New"/> <input type="button" value="Edit"/></p>
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Active Categories & Colors:

Customer Pay:				
Non-Billable Time:				
Internal:				
Mfg Warranty:				

Work Sold box and Produced Bar Graph on the Service Advisor page shown below.

