

Autosoft DMS
**Preparing for
NADA Academy**
Fixed Ops: Service

Copyright

© 2017 Autosoft, Inc. All rights reserved.

The information in this document is subject to change without notice. No part of this document may be reproduced, stored in a retrieval system, or transmitted in any form or by any means electronic or mechanically, including photocopying, for any purpose other than the purchaser's personal use without written permission from Autosoft, Inc.

The software described in this document is provided under a license agreement or nondisclosure agreement between Autosoft, Inc. and the purchaser. The software may only be used and copied in accordance with the terms of that agreement.

Autosoft, Inc.
61 Executive Court
West Middlesex, PA 16159
www.autosoftdms.com

Trademarks

Autosoft is either a registered trademark or trademark of Autosoft, Inc. in the United States and/or other countries. Microsoft is either a registered trademark or trademark of Microsoft Corporation in the United States and/or other countries. Any vehicle makes and models used in this document are either registered trademarks or trademarks of their respective manufacturer. Any other products mentioned in this document are registered trademarks or trademarks of their respective holders and should be noted as such.

Table of Contents

Introduction.....	1
Accessing Customer-Pay Repair Orders	2
Obtaining the Total Number of New Vehicles Sold in the Last Five Years.....	3
Running an Open Repair Order Report and Exception/Deviation Report	4
Open Repair Order Report	4
Exception/Deviation Report.....	4
Running a Payroll Report for the Service Technicians	5
Reporting Labor Cost and the Weighted Average Tech Cost.....	6
Conclusion.....	7

Introduction

As you're preparing for the NADA Academy, you may need to gather some materials from your Autosoft DMS. This manual will walk you through the generation of the reports about which we're most frequently asked when our dealerships are about to enter the NADA Academy fixed ops service training.

Tip: As part of the Service portion of the NADA Academy Fixed Ops training, you will be asked to provide copies of the customer-facing service menus you use to demonstrate transparency and build customer confidence upon each customer's arrival for service. This is not something you can obtain from your Autosoft DMS, as the menus within the DMS are meant for shop use only.

If you do not have such customer-facing service menus, Autosoft advises that you bring any customer-facing items you use in your Service Department to aid you in the development of said menus.

Accessing Customer-Pay Repair Orders

In preparation for NADA Academy, your dealership's Service Department may be asked to provide 50 customer-pay repair orders, in sequence, and from a recent period. While quick lube repair orders can be included, repair orders with only warranty and internal repairs must be excluded.

The Autosoft DMS Service Writing module's Archived Repair Orders feature will provide the information you need. Each archived repair order will include the labor price for each operation, the flat rate time used to calculate the labor price, and the total labor cost for the repair order.

1. From the Service Writing main menu, select **Reports & Updates**.
2. The Service Reports/Updates menu will open. Click **R/O Archives**.
3. Select **Archive Repair Orders** on the R/O Archives menu.
4. In the **From** and **To** fields, type the repair order numbers at which you would like to start and end the archive. All of the repair orders within the range will be archived. For the purpose of NADA Academy preparation, choose a recent set of closed repair order numbers. Select more than 50 repair orders so you are left with at least 50 customer-pay repair orders after excluding any warranty and internal repair orders that are included in the archive.
5. Click **OK** when prompted to verify you want to archive the records. If any repair orders are missing within the sequence you selected, the system will prompt you with a message indicating the number of repair orders that are missing. Click **OK** to acknowledge the message.

Once you've archived the repair orders, you can view the archived report and highlight the repair orders that meet the requirements. To do this, follow these steps.

1. While still on the R/O Archives menu, select **View Archived Repair Orders**.
2. The Archive List pop-up will open. Select an archived PDF file by clicking on its file name. The PDF archive report will open.

Use this report to select five hard copy customer-pay repair orders that show the customer signature, actual time paid, the technician, time punches, and technician notes and make physical copies, front and back, of the repair orders.

Obtaining the Total Number of New Vehicles Sold in the Last Five Years

When preparing for NADA Academy, you may be asked to tally the number of new vehicles sold by your dealership in the last five years, excluding fleet vehicles. You can easily find this information using Autosoft DMS.

Important: You may not have access to the Autosoft DMS Dealership Accounting module and its Reports & DOCs feature. If this is the case, you must ask one of your Accounting Department users to run the report for you.

1. From the Dealership Accounting main menu, select **Reports & DOCs**.
2. The Reports menu will open. Select **Vehicle Sales**. The Vehicle Sales Reports menu will open.
3. Click **Vehicle Sales**.
4. The Vehicle Sales pop-up will open. Enter **00** or select **All Salesmen** from the drop-down list to print the sales for all your dealership's salespeople. Enter the five-year date range using the **From** and **To** fields. The **To** field will auto-populate with the current date (MM/DD/YYYY). Change that if necessary.
5. When the system prompts you to verify that your printer is ready, select **To Printer** to send the report to your printer, or **To Screen** to view the report as a PDF on screen (you can print or save the report from your PDF viewer).
6. Click **Print**. The system may take some time to pull the data for the report.

The report lists the sales by sales type (new vehicles, used vehicles, wholesale, etc.) Review the report and collect the number of new, non-fleet vehicles sold.

Running an Open Repair Order Report and Exception/Deviation Report

Open Repair Order Report

When preparing for NADA Academy, it will be necessary to run an open repair order report and exception/deviation report for a single day.

1. From the Service Writing main menu, select **Daily R/O Update**.
2. Select **Daily Reports/Pre-Writes** from the Daily R/O Update menu.
3. Click **List All Open Repair Orders**.
4. The system will prompt you to verify your printer is ready. Select **To Printer** to print a hard copy of the report, **To Screen** to view a PDF version of the report on screen, or **Export to Excel** to save the report and open it in Microsoft Excel.
5. Click **Print**. The system will run the report of all open repair orders. The report lists the R/O number, customer's name, service date, and the cost and sale totals for parts and labor for each repair order. The bottom of the report lists the total cost and sale for parts and labor for all the repair orders on the report, the totals for the primary customer repair orders, and the number of open repair orders in the system.

Exception/Deviation Report

If you're attending NADA Academy, you will be asked to provide an exception/deviation report. While the FLEX DMS does not offer this report, per se, you can view any changes that have been made for a single-day period using the Previous Daily Summaries. To do this:

1. From the Daily R/O Update menu, select **Daily Reports/Pre-Writes**.
2. The Miscellaneous Daily Reports menu will open. Click **Previous Daily Summaries**.
3. The Previous Daily Summaries pop-up will open listing the available updates if you updated more than once a day.
4. Click the update you want to view from the pop-up list. The information will display on the screen.
5. Print the information from the viewing screen as needed.

Running a Payroll Report for the Service Technicians

When you attend NADA Academy, you may be expected to provide some Accounting information pertaining to the department. For example, you may be expected to provide a document reporting the total number of technicians, their hourly pay, and the average pay for the group.

To create this report, follow these steps:

Important: If you do not have access to the Dealership Accounting module and its Payroll feature, a member of your dealership's Accounting Department will have to run this report for you.

1. From the Dealership Accounting main menu, select **Payroll**.
2. The Dealership Payroll menu will open. Click **Reports**.
3. Select **Payroll & Department Totals**. This report provides payroll totals for each employee, as well as department totals. The Service Technician Department will be broken out at the end of the report.
4. The Print Payroll Totals pop-up will allow you to set the starting and stopping point for the data pull. In the **From** fields, type the starting month and day; enter the ending month and day in the **To** fields.
5. When the system prompts you to verify your printer is ready, select **To Printer** to print a hardcopy of the report, or **To Screen** to view a PDF version of the report on screen. Click **Print**.

The system will generate the report, which provides payroll totals for each employee, as well as department totals for the time period you specified when generating the report.

The Service Technician Department will be broken out at the end of the report. It will list each technician by Technician Number and include their hours worked and total pay. The report will then create department totals using those employee figures.

6. During your NADA Academy training, you'll use the Service Technician information from the Payroll report to create a list of each employee and his or her hourly rate. You'll also need to total the number of technicians and calculate the average pay for the group.

Reporting Labor Cost and the Weighted Average Tech Cost

Running the Daily Service DOC will help you calculate your labor cost and weighted average technician cost before you begin the NADA Academy.

To calculate your labor and weighted average technician costs, follow these steps:

Important: For this report to be current, your Accounting Department must first complete the report within the Accounting module's Standard Daily DOC application.

1. From the Service Writing main menu, select **Report & Updates**.
2. On the Service Reports/Updates menu, click **Daily Service DOC**.
3. The Daily Operating Control will open, listing year-to-date and month-to-date sales and gross totals for the Service Department by default. The sales, gross, units, and gross per unit are represented for the labor on customer-pay, service contract, quick service, warranty claims, internal, and other repair order types.

Daily Operating Control (Marks Motors)									
Marks Motors									
02/16/2017 Day 29 Of 31 Days		YTD				MTD			
	Sales	Gross	Unit	GPUS	Sales	Gross	Unit	GPUS	
003 CUST. LABOR CARS & L/D TR	184119	132904	1550	86	1694	1419	15	95	
005 SER/CONT LAB. CARS & LD T	24593	18605	82	227	150	116	1	116	
007 QUICK SER. LAB. CARS & LD	1188	1122	5	224					
009 CUST. LABOR COMM/FLT/HD T									
011 SER/CONT LAB. COMM/FLT/HD									
013 QUICK SER. LAB COMM/FLT/H									
020 WARR CLAIM LABOR-MECHANIC	76829	56252	1062	53	155	112	2	56	
022 INTERNAL LABOR-MECHANICAL	85845	61763	610	101	150	105	3	35	
024 NEW VEHICLE INSP. LABOR	7927	6023	96	63					
026 ADJ. C/OF LABOR SALES MEC		-98630							
030 SUBLET REPAIRS MECHANICAL	36238	708	98	7					
031 SHOP SUPPLIES SALES MECHA	22	19	6	3	3		1	0	
033 GROSS MECHANICAL DEPARTME	416761	178766	3509	51	2152	1752	22	80	
035 MINUS EXPENSES MECHANICAL		-5051				-5051			
037 NET PROFIT BEFORE TRANSFE	416761	173715	3509	50	2152	-3299	22	-150	

4. To print the report, click **Print**.
5. The system will prompt you to verify that your printer is ready. Select **To Printer** to send the report to the printer or **To Screen** to view a PDF of the report on screen. Click **Print**.
6. Add the labor figures to calculate a total sales and gross for Service labor.

7. Use the totals you calculated to calculate your shop's **labor cost**. Subtract the **total labor gross** from the **total labor sales** to obtain this figure.
8. To calculate the **weighted average tech cost**, divide the **labor cost** by the **total hours sold** (total units).

Conclusion

If you need further assistance collecting materials for NADA Academy, please feel free to contact Autosoft's Customer Success Center at 800.473.4630 or refer to the Autosoft Help Center accessible through the F1 screens in the DMS.