

# Chapter 10 Reports & Updates

The Service Reports/Updates menu is used to run service reports and to perform a monthly update of your service data. Almost all of the reports use the repair order closing date to generate the report information. The exceptions are the Writer and Technician Statistic reports, which use the repair order update date (the date the repair order was updated to Accounting using the Daily R/O Update). You can view the closing date that will be used for the repair order on the Review & Print screen when you are printing and closing the repair order.

The menu displays two dates. The “Last Monthly Update Was” date identifies the month and year used for the last monthly update run. The “Completed On” date identifies the date on which the last update was run.

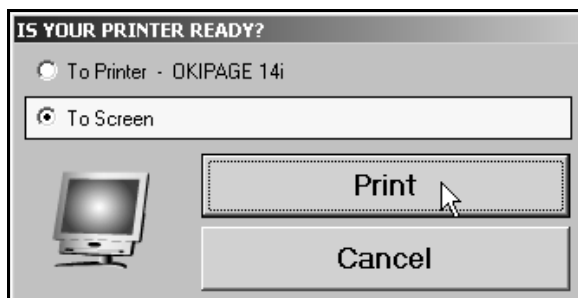
To use the menu, click the button that corresponds to the menu option you want to select. The appropriate submenu or prompt appears. When you are finished on the Service Reports/Updates menu, click **Exit** to return to the Service Writing menu.

| Service Reports/Updates (ABC Motors) |  |
|--------------------------------------|--|
| Service Time Summary Reports         | <div>Service Reports/Updates</div> <div>Report Generator</div> <div>Last Monthly Update Was May, 2008</div> <div>Completed On 05/31/2008</div> |
| Writer/Technician Statistics         |  |
| Miscellaneous Service Reports        |  |
| Payroll Time Flags                   |  |
| Monthly Summary Update               |  |
| R/O Archives                         |  |
| Daily Service DOC                    |  |
| Exit                                 |  |

**Important:** Different reports are designed to pull different information. Therefore, *the reports will not match*. For example, one writer report includes discounts while another writer report doesn't, so the reports will not be the same. Another reason reports will not match is because some reports use the date when the repair order was updated to Accounting and other reports use the close date for the repair order.

## Selecting Print Criteria

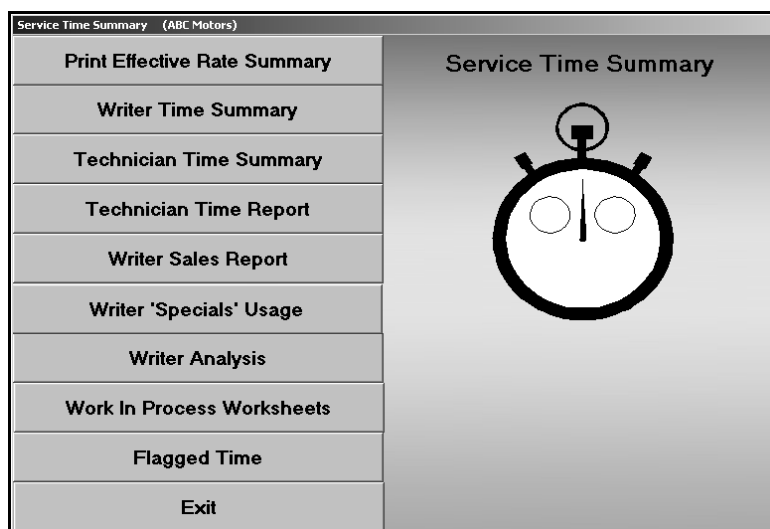
You have the option of viewing the generated reports on your screen or printing them to paper. When you select a report to print (and after you enter any criteria the system prompts you to specify), select **To Printer** to print the information or **To Screen** to view the information on your screen.



If you select to view the report, you can print the report from the viewing screen by clicking **File** and selecting **Print**. To exit the viewing screen, click **File**, and click **Exit**.

## Service Time Summary Reports

This button advances you to the Service Time Summary menu. This menu is used to print service-timing reports. These reports can help you determine your effective labor rate and can be used to determine the time and labor sold by advisors and technicians. Click the button that corresponds to the report you want to print. Follow the prompts on your screen. When you are finished, click **Exit** to return to the Service Reports/Updates menu.



## Print Effective Rate Summary

Use this button to print your effective rates. When prompted to verify your printer is ready, select the period you want to use to print the summary: Previous Month, Current Month, or Last 30 Days.

The report prints a page for combined rates, customer pay, internal, and warranty. Each page lists the daily and month-to-date flat hours, sales, and effective rate for each date listed.

| Effective Rate Summary - Combined |                   |         |           |                 |         |           |
|-----------------------------------|-------------------|---------|-----------|-----------------|---------|-----------|
| Date                              | ----- Daily ----- |         |           | ----- MTD ----- |         |           |
|                                   | Flat Hrs.         | Sales   | Eff. Rate | Flat Hrs.       | Sales   | Eff. Rate |
| 06/01                             | 77.6              | 3490.14 | 44.98     | 77.6            | 3490.14 | 44.98     |
| 06/02                             | 49.7              | 1859.74 | 37.42     | 127.3           | 5349.88 | 42.03     |

## Writer Time Summary

Use this button to print a time summary for each service writer. The report uses the repair order closing date. This report may take a long time to generate, so be patient while the system gathers the information.

The report prints one page for each writer in the system. The report displays the total repair orders, total time, labor, sales, time per repair order, average sale, and effective rate for each writer. The information is broken down per month. The information for the month is updated during the monthly summary update. Therefore, from January to the current month displays the time summary for the current year, and the next month to December displays the information from last year. The printout also displays the yearly totals. The figures on the report could be off due to the month-end update.

| Writer Time Summary: PAUL |             |            |             |              |           |           |
|---------------------------|-------------|------------|-------------|--------------|-----------|-----------|
| Mo.                       | Total R/O's | Total Time | Labor Sales | Time Per R/O | Avg. Sale | Eff. Rate |
| JAN:                      | 163         | 285.4      | 9278.38     | 1.8          | 56.92     | 32.51     |
| FEB:                      | 172         | 336.8      | 10990.83    | 2.0          | 63.90     | 32.63     |

## Technician Time Summary

Use this button to print a time summary for each service technician. Like the Writer Summary, this report also uses the repair order close date.

The report prints one page for each technician in the system. The report displays the total repair orders, total time, labor, sales, time per repair order, average sale, and effective rate for each technician. The information is broken down per month. The information for the month is updated during the monthly summary update. Therefore, from January to the current month displays the time summary for the current year, and from next month to December displays the information from last year. The printout also displays the yearly totals. The figures on the report could be off due to the month-end update.

| Technician Time Summary: (01) TOM |             |            |             |              |           |           |
|-----------------------------------|-------------|------------|-------------|--------------|-----------|-----------|
| Mo.                               | Total R/O's | Total Time | Labor Sales | Time Per R/O | Avg. Sale | Eff. Rate |
| JAN:                              | 178         | 119.1      | 4196.50     | .7           | 23.58     | 35.24     |
| FEB:                              | 185         | 128.3      | 4735.09     | .7           | 25.60     | 36.91     |

## Technician Time Report

Use this button to print a time report for all of the technicians based on a specific date range. The report uses the repair order close date. This is a good report to run to check your labor sales. When prompted, specify the beginning and ending dates you want to use for the report. Select to generate a simple or detailed report, and select your print criteria.

The simple report prints one page for each technician. Each page lists the repair orders the technician worked on and displays the time units and labor amount for each repair order. The information is broken down into three columns: customer pay, internal, and warranty. A plus sign (+) after a labor amount indicates the amount was adjusted to more than the regular labor rate per unit, and a minus sign (-) after a labor amount indicates the amount was adjusted to less than the regular labor rate per unit (for services such as a lube-oil-filter). The bottom of each technician's section displays the totals for the date range.

| Technician Time Report |          |               |              |              |                                 |               |       |  |  |
|------------------------|----------|---------------|--------------|--------------|---------------------------------|---------------|-------|--|--|
| Technician: (01) TOM   |          |               |              |              | From: 06/01/2008 To: 06/30/2008 |               |       |  |  |
|                        |          | ---- C/P ---- |              | --- Int. --- |                                 | ---- W/C ---- |       |  |  |
|                        |          | Unit          | Labor        | Unit         | Labor                           | Unit          | Labor |  |  |
| 47486                  | 06/09/08 | INTERNAL -    | 8098 ( 0 .00 | 8            | 18.00+                          | 9             | 47.79 |  |  |
| 47498                  | 06/09/08 | INTERNAL -    | 8086 ( 0 .00 | 8            | 18.00+                          | 9             | 47.79 |  |  |

The end of the report provides a time summary for all of the technicians. It displays the total labor units and cost for customer pay, internal, and warranty. Next, It lists the total time units, sales, number of repair orders, and average total per repair order. Finally, it lists the number of technicians reporting for the period and lists the average labor units, sales, and repair orders per technician.

| Technician Time Report            |                 |                  |                 |                |  |  |
|-----------------------------------|-----------------|------------------|-----------------|----------------|--|--|
| Summary All Technicians           |                 | From: 06/01/2008 |                 | To: 06/30/2008 |  |  |
|                                   | ----- C/P ----- | ----- Int. ----- | ----- W/C ----- |                |  |  |
|                                   | Unit Labor      | Unit Labor       | Unit Labor      |                |  |  |
| Total All Techs .....             | 4430 18546.82   | 1499 4174.90     | 788 3993.80     |                |  |  |
|                                   | =====           | =====            | =====           |                |  |  |
|                                   |                 |                  |                 |                |  |  |
| Total Units .....                 | 6717            |                  |                 |                |  |  |
| Sales .....                       | \$ 26715.52     |                  |                 |                |  |  |
| Repair Orders .....               | 415             |                  |                 |                |  |  |
| Per Repair Order .....            | \$ 64.37        |                  |                 |                |  |  |
| Total Technicians Reporting ..... | 10              |                  |                 |                |  |  |
| Average Units Per Tech .....      | \$ 671.7        |                  |                 |                |  |  |
| Average Sales Per Tech .....      | 2671.55         |                  |                 |                |  |  |
| Average R/O's Per Tech .....      | \$ 41.5         |                  |                 |                |  |  |

The detailed report lists the same information as the simple report, but it lists the individual repairs for each repair order separately and identifies the pay type, labor level, charged units, actual units, and cost for each repair.

| Technician Time Report |          |                   |                                 |       |              |        |               |       |       |                      |                 |     |     |     |     |       |
|------------------------|----------|-------------------|---------------------------------|-------|--------------|--------|---------------|-------|-------|----------------------|-----------------|-----|-----|-----|-----|-------|
| Technician: (01) TCM   |          |                   | From: 06/01/2008 To: 06/30/2008 |       |              |        |               |       |       |                      |                 |     |     |     |     |       |
|                        |          |                   | ---- C/P ----                   |       | --- Int. --- |        | ---- W/C ---- |       |       |                      |                 |     |     |     |     |       |
|                        |          |                   | Unit                            | Labor | Unit         | Labor  | Unit          | Labor |       |                      |                 |     | T/L | C/U | A/U | Cost  |
| 47298                  | 06/03/08 | KATHERINE WILLS   | 5                               | 3.35- | 0            | .00    | 0             | .00   | Rep:1 | 2688                 | LUBE OIL FILTER | C/A | 5   | 4   |     | 6.80  |
| 47311                  | 06/04/08 | INTERNAL - 8039 ( | 0                               | .00   | 8            | 18.00+ | 10            | 53.10 | Rep:1 | 9099                 | STATE INSPECTIO | I/A | 8   | 2   |     | 3.40  |
|                        |          |                   |                                 |       |              |        |               |       | Rep:2 | NEW VEHICLE MAKE REA | N/A             | 10  | 8   |     |     | 13.60 |
| 47315                  | 06/04/08 | INTERNAL - 8105 ( | 0                               | .00   | 8            | 18.00+ | 11            | 56.41 | Rep:1 | 9099                 | STATE INSPECTIO | I/A | 8   | 3   |     | 5.10  |

## Writer Sales Report

Use this button to print a sales report for all of the service writers based on a specific date range. The information on this report reflects discounts applied to the service.

The report lists the repair orders for each writer and displays the time units and labor amount for each repair order. The information is broken down into three columns: customer pay, internal, and warranty. The total value of the parts sold on each repair order is also displayed. The end of each technician's section displays the totals for the date range.

| Writers Sales Report |          |                 |                  |       |                |       |               |       |       |  |
|----------------------|----------|-----------------|------------------|-------|----------------|-------|---------------|-------|-------|--|
| Writer: (02) BILL    |          |                 | From: 06/01/2008 |       | To: 06/30/2008 |       |               |       |       |  |
|                      |          |                 | -----C/P-----    |       | -----Int-----  |       | -----W/C----- |       |       |  |
|                      |          |                 | Unt              | Labor | Unt            | Labor | Unt           | Labor | Parts |  |
| 47402                | 06/08/08 | INTERNAL - 8079 | 0                | .00   | 8              | 18.00 | 9             | 47.79 | 4.90  |  |
| 47415                | 06/08/08 | INTERNAL - 8063 | 0                | .00   | 8              | 18.00 | 10            | 53.10 | 4.90  |  |

The end of the report lists the totals for the entire Service Department. It also breaks the totals down according to customer pay, internal, and warranty sales.

| Writers Sales Report                             |          |               |         |                           |         |          |  |
|--|----------|---------------|---------|---------------------------|---------|----------|--|
| Total Department From: 06/01/2008 To: 06/30/2008 |          |               |         |                           |         |          |  |
| -----C/P-----                                    |          | -----Int----- |         | -----W/C-----             |         |          |  |
| Unit   | Labor    | Unit          | Labor   | Unit                      | Labor   | Parts    |  |
| 4430   | 18312.66 | 1499          | 4174.90 | 788                       | 3993.80 | 22815.57 |  |
| =====  | =====    | =====         | =====   | =====                     | =====   | =====    |  |
| Total Units .....                                |          | 6717          |         | Total Labor Sales .....   |         | 26481.36 |  |
| Repair Orders .....                              |          | 442           |         | Parts Sales .....         |         | 22815.57 |  |
| Labor Units Per R/O .....                        |          | 15            |         | Labor Sales Per R/O ..... |         | 59.91    |  |

## Writer 'Specials' Usage

Use this button to print a trouble code/fail code usage report for a specified date range. It can help with your dealership's upsales. The report is based on the service menu codes added to repair orders. In order for the report to work, the menu/trouble code needs to have commission amounts set.

The report lists every repair order with a menu code on it. In addition, the report lists the service writer for the repair order, the service date, customer's name, number of labor units sold, sale amount, rate, and the advisor's commission percentage or flat commission for the repair order. The end of the report lists the totals repair orders on the report and the totals for all of the repair orders.

| Writer Special Usage |          |                     |                  |     |                |      |         |         |
|----------------------|----------|---------------------|------------------|-----|----------------|------|---------|---------|
| Advisor: (02) BILL   |          |                     | From: 06/01/2008 |     | To: 06/30/2008 |      |         |         |
| R/O                  | Date     | Cust.               | T/C              | Unt | Sale           | Rate | % Comm. | \$ Flat |
| 47117                | 06/01/08 | INTERNAL - 8019 LOF |                  | 5   | 4.50           | %    | .00     | 2.00    |
| 47117                | 06/01/08 | INTERNAL - 8019 SI  |                  | 8   | 18.00          | %    | .00     | 1.00    |

## Writer Analysis

Use this button to print an analysis for each service writer for a specified date range. This report does not include voided repair orders. Type the beginning and ending dates you want to use for the report.

The report provides two summaries for each writer. First, the report lists the total number of repair orders, the total time units, and labor for customer pay, internal pay, and warranty pay, and the total parts and sublet for each date the writer was active. The customer pay gross profit per hour is calculated by dividing the number of customer pay repair orders by the customer pay gross profit. The customer pay gross profit percentage is calculated by dividing the customer pay labor by the customer pay gross profit.

| Writer Analysis    |      |               |                  |               |                |               |        |         |        |
|--------------------|------|---------------|------------------|---------------|----------------|---------------|--------|---------|--------|
| Advisor: (02) BILL |      |               | From: 06/01/2008 |               | To: 06/30/2008 |               |        |         |        |
| Date               | RO's | -----C/P----- |                  | -----Int----- |                | -----W/C----- |        | Parts   | Sublet |
|                    |      | Unt           | Labor            | Unt           | Labor          | Unt           | Labor  |         |        |
| 06/01/08           | 13   | 194           | 951.75           | 11            | 38.50          | 41            | 217.71 | 830.78  | .00    |
| 06/02/08           | 11   | 97            | 300.00           | 8             | 18.00          | 26            | 138.06 | 1114.87 | .00    |

The next part of each writer's analysis provides a comprehensive analysis of the writer's customer, internal, and warranty totals, as well as the overall totals. The end of the report provides the totals for the whole Service Department.

| Writer Analysis                             |            |                                 |
|---|------------|---------------------------------|
| Advisor Sales Analysis: (02) BILL           |            | From: 06/01/2008 To: 06/30/2008 |
| (Report Excludes Body Shop)                 |            |                                 |
| Customer Pay Repair Orders .....            | 119        |                                 |
| Customer Pay Hours .....                    | 193.1      |                                 |
| Average Customer Pay Hours Per R/O .....    | 1.6        |                                 |
| Customer Pay Labor .....                    | \$ 7736.57 |                                 |
| Average Customer Pay Labor Per R/O .....    | \$ 65.01   |                                 |
| Customer Pay Labor Gross Profit .....       | \$ 4916.97 |                                 |
| Customer Pay Labor Gross Profit % .....     | 63.55%     |                                 |
| Customer Pay Labor Gross Profit Per R/O ... | \$ 41.32   |                                 |
| Customer Pay Parts .....                    | \$ 7442.34 |                                 |
| Customer Pay Sublet .....                   | \$ 300.99  |                                 |
|   |            |                                 |
| Internal Repair Orders .....                | 31         |                                 |
| Internal Hours .....                        | 26.0       |                                 |
| Average Internal Hours Per R/O .....        | .8         |                                 |
| Internal Labor .....                        | \$ 727.90  |                                 |
| Average Internal Labor Per R/O .....        | \$ 23.48   |                                 |
| Internal Labor Gross Profit .....           | \$ 359.50  |                                 |
| Internal Labor Gross Profit % .....         | 49.39%     |                                 |
| Internal Labor Gross Profit Per R/O .....   | \$ 11.60   |                                 |
| Internal Parts .....                        | \$ 57.31   |                                 |
| Internal Sublet .....                       | \$ 128.00  |                                 |
|   |            |                                 |
| Warranty Claim Repairs Orders .....         | 25         |                                 |
| Warranty Claim Hours .....                  | 19.9       |                                 |
| Average Warranty Claim Hours Per R/O .....  | .8         |                                 |
| Warranty Claim Labor .....                  | \$ 995.04  |                                 |
| Average Warranty Claim Labor Per R/O .....  | \$ 39.80   |                                 |
| Warranty Labor Gross Profit .....           | \$ 586.04  |                                 |
| Warranty Labor Gross Profit % .....         | 58.90%     |                                 |
| Warranty Labor Gross Profit Per R/O .....   | \$ 23.44   |                                 |
| Warranty Claim Parts .....                  | \$ 2123.10 |                                 |
| Warranty Claim Sublet .....                 | \$ .00     |                                 |
|   |            |                                 |
| Parts Sales .....                           | \$ 9622.75 |                                 |
|   |            |                                 |
| Sublet Sales .....                          | \$ 428.99  |                                 |
|   |            |                                 |
| Total Hours .....                           | 239.0      |                                 |
| Total Labor Sales .....                     | \$ 9459.51 |                                 |
| Total Repair Orders .....                   | 164        |                                 |
| Labor Hours Per R/O .....                   | 1.5        |                                 |
| Total Labor Gross Profit .....              | \$ 5862.51 |                                 |
| Labor Gross Profit % .....                  | 61.97%     |                                 |
| Labor Gross Profit Per R/O ...              | \$ 35.75   |                                 |
| Labor Sales Per R/O .....                   | \$ 57.68   |                                 |
| Average R/O's Per Day .....                 | 15         |                                 |



## Work In Process Worksheet

Use this button to print a worksheet that lists all of the open repair orders. You use the printout to “pencil in” the technician costs so the amount can be added to the Service Time Flags and posted to payroll. The report groups the information by technician. For each open repair order, the printout lists the repair order number, service date, each repair on the repair order, and the repair type and labor level assigned to each repair.

| WIP Work Sheet For Tech:01 |          |                           |     |    |    |       |           |  |  |
|----------------------------|----------|---------------------------|-----|----|----|-------|-----------|--|--|
| ADA                        |          | Through 06/30/2008        |     |    |    |       |           |  |  |
| 47611                      | 06/14/08 | LILLY WILLIAMS            |     |    |    |       |           |  |  |
| Repair 1                   |          | CUSTOMER STATES PASS. REA | C/A | 10 | 10 | 17.00 | [ _____ ] |  |  |
| 47664                      | 06/21/08 | FRED SMITH                |     |    |    |       |           |  |  |
| Repair 1                   |          | SERVICE ENGINE SOON LIGHT | C/A | 10 | 10 | 10.00 | [ _____ ] |  |  |

## Flagged Time

Use this button to print a flag-time report for a specific date range. This report prints a real-time flag-time report. Every time you add time flag data to a repair order on the Close Service screen, whether you add to or subtract from the time, the system stores the information in the report database. The system calculates the technicians' actual time units every time you print the report. You can use this report to identify technicians' time units and use the information to post payroll.

This report does not pull information from the Payroll Time Pre-flag report. The Payroll Pre-flag report is a completely unrelated report.

This report includes all open repair orders and closed repair orders that have been updated to Accounting during the date range you specify. The report prints the information by technician. The top part of the report lists all of the repair orders for the technician for the date range you selected. It lists the repair order number, customer's name, each repair on the repair order, the repair type, labor level, customer complaint for the repair, charge time units, actual time units, and the status of the repair order. The bottom of the report lists the total repairs the technician worked on, the total charged time units, and the total actual time units.

| Flagged Time 06/21/2008 To 06/22/2008 |              |          |     |   |                           |     |     |        |  |
|---------------------------------------|--------------|----------|-----|---|---------------------------|-----|-----|--------|--|
| Tech 03                               |              |          |     |   |                           | C/T | A/T | Status |  |
| 47667                                 | ROBERT JONES | Repair 1 | (C) | A | HEATER/AIR BLOWER DOESN'T | 12  | 10  | Open   |  |
| Total Repairs                         |              | 1        |     |   |                           |     |     |        |  |
| Total Charge Units                    |              | 12       |     |   |                           |     |     |        |  |
| Total Actual Units                    |              | 10       |     |   |                           |     |     |        |  |

## Writer/Technician Statistics

This button advances you to the Advisor/Writer/Technician Stats menu. This menu is used to view and print statistics for service writers and technicians. Click the button that corresponds to the menu option you want to select. The appropriate prompt or screen appears. When you are finished, click **Exit** to return to the Service Reports/Updates menu.

| Advisor/Writer/Technician Stats (ABC Motors) |                                 |
|--|---------------------------------|
| Technician Labor Stats                       | Advisor/Writer/Technician Stats |
| Tech/Advisor Stats                           |                                 |
| View Advisor/Writer Stats                    |                                 |
| View Technician Stats                        |                                 |
| Exit   |                                 |

### Technician Labor Stats

Use this button to print technician labor statistics for a specific month. Type the two-digit month (01 for January, 02 for February, etc.). When prompted to verify your printer is ready, select your print criteria.

For each technician, the report displays the hourly cost, actual time, cost, chargeable time, labor sale, and time ratio percentage for the selected month and year-to-date.

| Technician Labor Stats For Month: 06 |         |             |                         |               |                                  |               |
|--------------------------------------|---------|-------------|-------------------------|---------------|----------------------------------|---------------|
| No.                                  | Name    | Hr.<br>Cost | -----<br>Actual<br>Time | -----<br>Cost | --- Chargeable ---<br>Time Sales | Time<br>Ratio |
| 01                                   | TOM     | 17.00 (H)   | 68.9                    | 1171.30       | 90.5 3125.8                      | 131.3%        |
| 02                                   | STEPHEN | 17.00 (H)   | 81.8                    | 1390.60       | 107.8 4965.29                    | 131.8%        |
| 03                                   | DAVID   | 17.00 (H)   | 68.2                    | 688.30        | 68.6 2333.95                     | 100.6%        |
| 04                                   | FRANCIS | 17.00 (H)   | 63.2                    | 1074.40       | 64.9 2891.7                      | 102.7%        |
| 05                                   | FRED    | 17.00 (H)   | 62.8                    | 1067.60       | 65.1 3058.85                     | 103.7%        |
| 06                                   | JOHN    | 17.00 (H)   | 58.4                    | 992.80        | 62.7 2370.78                     | 107.4%        |
| 07                                   | STEVE   | 17.00 (H)   | 79.4                    | 1349.80       | 73.7 3471.58                     | 92.8%         |
| 08                                   | RALPH   | 17.50 (H)   | 71.8                    | 1256.50       | 73.9 3143.79                     | 102.9%        |
| 09                                   | DARRELL | 17.50 (H)   | 62.3                    | 1090.25       | 88.6 2596.48                     | 142.2%        |
| Profitability                        |         | 63.9%       | 616.8                   | 10081.55      | 695.8 27958.22                   | 112.8%        |

## Tech/Advisor Stats

Use this button to print the statistics for the current period or pay period. This report uses the date when the repair order was updated to Accounting and not the close date for the repair order. Use the drop-down calendar to select the date range you want to use for the report, and click Go. When prompted to verify your printer is ready, select your print criteria.

The report is broken down into two parts. The first part of the report is the technician time report. For each technician, the report displays the actual time and cost, chargeable time and cost, time ratio percentage, and effective rate for the current period or pay. The bottom of this section displays the totals for all of the technicians.

| Technician Time From:06/01 To:06/30 |         |                                 |                                  |               |              |  |
|-------------------------------------|---------|---------------------------------|----------------------------------|---------------|--------------|--|
| No.                                 | Name    | ----- Actual -----<br>Time Cost | --- Chargeable ---<br>Time Sales | Time<br>Ratio | Eff.<br>Rate |  |
| 01                                  | TOM     | 70.9 1205.30                    | 90.8 3121.95                     | 128.1%        | 34.38        |  |
| 02                                  | STEPHEN | 81.7 1388.90                    | 107.0 4860.31                    | 131.0%        | 45.42        |  |
| 03                                  | DAVID   | 75.8 823.40                     | 80.0 2893.79                     | 105.5%        | 36.17        |  |
| 04                                  | FRANCIS | 66.1 1123.70                    | 67.6 2984.36                     | 102.3%        | 44.15        |  |
| 05                                  | FRED    | 58.6 996.20                     | 63.7 2991.95                     | 108.7%        | 46.97        |  |
| 06                                  | JOHN    | 53.8 914.60                     | 59.1 2187.78                     | 109.9%        | 37.02        |  |
| 07                                  | STEVE   | 72.5 1232.50                    | 74.7 3533.81                     | 103.0%        | 47.31        |  |
| 08                                  | RALPH   | 70.0 1225.00                    | 74.1 3154.41                     | 105.9%        | 42.57        |  |
| 09                                  | DARRELL | 61.9 1083.25                    | 89.0 2618.05                     | 143.8%        | 29.42        |  |
|                                     |         | 63.4 634.60                     | 66.6 2230.55                     | 105.0%        | 33.49        |  |
| Prof.                               | 64.75%  | 611.3 9992.85                   | 706.0 28346.41                   | 115.5%        | 40.15        |  |

The second part of the report is the advisor time report. For each advisor, the report displays the total repair orders, total time, total labor sales, average time per repair order, average sales, and effective rate broken down by customer pay, internal, and warranty, as well as displaying the overall totals.

| Advisor Time From:06/01 To:06/30 |                  |               |                |                    |              |              |
|----------------------------------|------------------|---------------|----------------|--------------------|--------------|--------------|
|                                  | Total<br>Repairs | Total<br>Time | Labor<br>Sales | Time Per<br>Repair | Avg.<br>Sale | Eff.<br>Rate |
| 01-TOM                           |                  |               |                |                    |              |              |
| C/P:                             | 248              | 196.6         | 7859.57        | .8                 | 31.69        | 39.98        |
| WAR:                             | 37               | 31.6          | 1553.49        | .9                 | 41.99        | 49.16        |
| INT:                             | 56               | 26.2          | 727.90         | .5                 | 13.00        | 27.78        |
|                                  | -----            | -----         | -----          | -----              | -----        | -----        |
| TOT:                             | 341              | 254.4         | 10140.96       | .7                 | 29.74        | 39.86        |

## View Advisor/Writer Stats

Use this button to open the Advisor/Writer Information screen. This screen is used to view and edit service advisor and service writer statistics. The screen will display the statistics for each month. The information for the month is updated during the monthly summary update. Therefore, from January to the current month displays the statistics for the current year, and from next month to December displays the information from last year. The repair order units displayed are per condition. When you are finished, click **Exit** to return to the Advisor/Writer/Technician Stats menu.

Advisor/Writer Information (ABC Motors)

### Advisor/Writer Information

Advisor/Writer Number:   
 Name:   
 Advisor/Writer:

| Mo  | R/O's | Hours | Sales    | Mo  | R/O's | Hours | Sales    |
|-----|-------|-------|----------|-----|-------|-------|----------|
| JAN | 163   | 285.4 | 9278.38  | JUL | 181   | 292.3 | 9308.25  |
| FEB | 172   | 336.8 | 10990.83 | AUG | 209   | 372.8 | 12233.03 |
| MAR | 181   | 344.2 | 12435.89 | SEP | 175   | 305.4 | 10660.40 |
| APR | 121   | 262.8 | 9401.41  | OCT | 202   | 349.5 | 12406.01 |
| MAY | 143   | 278.1 | 10118.28 | NOV | 127   | 256.3 | 8613.64  |
| JUN | 84    | 163.7 | 5724.14  | DEC | 117   | 199.6 | 6958.15  |

01 PAUL W  
 02 BILL W  
 03 JOHN W  
 04 ANDREW W  
 05 RAY W  
 06 ADAM W  
 07 BRIAN W  
 08 MIKE W  
 09 RICH W  
 10 TONY W

Exit Print Refresh Data Clear Screen Save

## Viewing Statistics

First, you must click **Refresh Data** to recompile the statistics to ensure they are up to date. Click **OK** when prompted to verify you want to refresh the data. Since the system scans the repair order history file, the process may take several minutes. The system will display a "Did That " message when it is finished refreshing the data. Click **OK** to acknowledge the message.

Once you refresh the data, type the advisor's or writer's code, or click the individual in the list displayed on the right side of the screen. The statistics fill in on the left side of the screen.

Click **Print** to print the selected advisor's or writer's statistics. When prompted, select your print criteria. The report lists the number of repair orders the individual worked on each month.

If you need to edit statistics, click in a field, and edit the information as needed. Click **Save** to save the changes. The information will be updated.

**Tip:** Because the statistics displayed on this screen are generated during the monthly update, the information may not be accurate depending on the day of the month you performed your monthly update (for example, the 5<sup>th</sup> day of the month rather than the 1<sup>st</sup> day of the month). Therefore, Autosoft recommends that you use the Writer Analysis or Writer Sales report when you want a comprehensive summary of a writer's activity for the month. Both of these reports use the repair order close date.

## View Technician Stats

Use this button to open the Technician Information screen. This screen is used to view and edit technician statistics. The screen will display the technician statistics for each month. The information for the month is updated during the monthly summary update. Therefore, from January to the current month displays the statistics for the current year, and from next month to December displays the information from last year. The repair order units displayed are per condition. When you are finished, click **Exit** to return to the Advisor/Writer/Technician Stats menu.

**Technician Information (ABC Motors)**

**Technician Information**

Technician Number: **08**  
Name: **RALPH**

| Mo. | R/O's | Charge Hours | Actual Hours | Labor Sales | Time R/O | Time Ratio |
|-----|-------|--------------|--------------|-------------|----------|------------|
| JAN | 88    | 113.7        | 129.8        | 5500.78     | 1.3      | 87.6       |
| FEB | 79    | 125.3        | 124.2        | 5548.81     | 1.6      | 100.9      |
| MAR | 100   | 130.7        | 130.7        | 5854.85     | 1.3      | 100.0      |
| APR | 80    | 147.9        | 134.1        | 6770.61     | 1.8      | 110.3      |
| MAY | 118   | 148.7        | 138.4        | 6761.89     | 1.3      | 107.4      |
| JUN | 55    | 63.0         | 58.1         | 2955.95     | 1.1      | 108.4      |
| JUL | 86    | 93.4         | 89.6         | 4095.10     | 1.1      | 104.2      |
| AUG | 106   | 127.3        | 126.7        | 5967.82     | 1.2      | 100.5      |
| SEP | 109   | 123.2        | 132.0        | 5351.35     | 1.1      | 93.3       |
| OCT | 99    | 146.2        | 154.5        | 6829.01     | 1.5      | 94.6       |
| NOV | 117   | 134.7        | 115.6        | 6121.24     | 1.2      | 116.5      |
| DEC | 91    | 117.6        | 117.1        | 5901.04     | 1.3      | 100.4      |

01 TOM  
02 STEPHEN  
03 DAVID  
04 FRANCIS  
05 FRED  
06 JOHN  
07 STEVE  
08 **RALPH**  
09 DARRELL

Exit Print Refresh Data Clear Screen Save

## Viewing Statistics

First, you must click **Refresh Data** to recompile the statistics to ensure they are up to date. Click **OK** when prompted to verify you want to refresh the data. Since the system scans the repair order history file, the process may take several minutes. The system will display a "Did That " message when it is finished refreshing the data. Click **OK** to acknowledge the message.

Once you refresh the data, type the technician's code, or click the technician in the list displayed on the right side of the screen. The statistics fill in on the left side of the screen.

Click **Print** to print the selected technician's statistics. When prompted, select your print criteria. The report lists the number of repair orders the individual worked on each month.

If you need to edit statistics, click in a field, and edit the information as needed. Click **Save** to save the changes you made. The information will be updated.

**Tip:** Because the statistics displayed on this screen are generated during the monthly update, the information may not be accurate depending on the day of the month you performed your monthly update (for example, the 5<sup>th</sup> day of the month rather than the 1<sup>st</sup> day of the month). Therefore, Autosoft recommends that you use the Technician Time report when you want a comprehensive summary of a technician's activity for the month. The Technician Time report uses the repair order close date.

## Miscellaneous Service Reports

This button advances you to the Miscellaneous Service Reports menu. This menu is used to print trouble code and menu usage reports, warranty labor operation reports, and “come back” reports.

To generate a report, click the button that corresponds to the report you want to print. Follow the prompts that appear on your screen. When you are finished, click **Exit** to return to the Service Reports/Updates menu.

It is important to note that you cannot directly compare reports on this menu. The OP Code Detail report considers all types of repair orders and reports by Menu code, Trouble/Fail code, and Labor Op Code (respectively). As a result, you cannot generate the Trouble/Condition Code & Menu Usage or the Warranty Labor Op Usage report and directly compare the data to the OP Code Detail report.

For example, if a Menu item has been set up to perform a warranty operation, and the warranty manufacturer's Labor Op Code is part of the Menu item, the Warranty Labor Op Usage report would provide data based on the labor op, but the OP Code Detail report would provide data based on the Menu code.

| Miscellaneous Service Reports (ABC Motors) |                               |
|--|-------------------------------|
| Trouble Code & Menu Usage                  | Miscellaneous Service Reports |
| Warranty Labor Op Usage                    |                               |
| Print 'Come Back' Report                   |                               |
| Service Discounts                          |                               |
| GM Input Sheet                             |                               |
| Op Code Detail                             |                               |
| Exit                                       |                               |

## Trouble/Condition Code & Menu Usage

Use this button to print a usage report for all of the trouble/condition codes and menu codes in the system. The information for this report is updated each month during the monthly update.

The first part of the report displays trouble code statistics. The report lists the total charge time/units and the total sale amount for the code this month and past 12 months.

| Trouble Code Stats             |                           |                   |        |                  |        |
|--------------------------------|---------------------------|-------------------|--------|------------------|--------|
| For Period From 06/04 To 06/30 |                           |                   |        |                  |        |
| No.                            | Desc.                     | ----- Month ----- |        | ----- Year ----- |        |
|                                |                           | Units             | Volume | Units            | Volume |
| 1C                             | COMPRESSION               | .0                | .00    | .0               | .00    |
| 1D                             | BROKEN                    | .6                | 33.00  | .6               | 33.00  |
| 1E                             | BURNED                    | .0                | .00    | .0               | .00    |
| 1F                             | CARBON DEPOSIT            | .0                | .00    | .0               | .00    |
| 1G                             | CHIPPED                   | .0                | .00    | .0               | .00    |
| 1H                             | CLOGGED/RESTRICTED/BLOCKE | .0                | .00    | .0               | .00    |
| LOF                            | LUBE-OIL-FILTER           | 2.8               | 101.25 | 2.8              | 101.25 |
| REC                            | RECALL                    | .7                | 37.80  | .7               | 37.80  |
|                                |                           | -----             | -----  | -----            | -----  |
|                                |                           | 4.1               | 172.05 | 4.1              | 172.05 |

The next part of the report displays menu code usage. The report lists the total charge time/units, the number of times the code was used, and the sale amount for each code for this month and past 12 months.

| Service FasQuote Usage |   |      |        |      |            |         |
|------------------------|---|------|--------|------|------------|---------|
| Code                   | Desc.                                   |      |        |      |            |         |
| LOF                    | 2688 LUBE OIL FILTER                    |      |        |      |            |         |
|                        | Current Month ... Units:                | 2030 | Freq.: | 410  | Volume \$: | 1638.14 |
|                        | Year-To-Date .... Units:                | 7347 | Freq.: | 1473 | Volume \$: | 6214.75 |
| ROT                    | 2299 ROTATE TIRES & CHECK AIR PRESSURE. |      |        |      |            |         |
|                        | Current Month ... Units:                | 547  | Freq.: | 143  | Volume \$: | 1758.65 |
|                        | Year-To-Date .... Units:                | 1845 | Freq.: | 487  | Volume \$: | 5947.25 |

## Warranty Labor Op Usage

Use this button to print a usage report for the warranty labor operation codes for a specific date range. When prompted, type the beginning and ending dates you want to use for the report. The report lists each labor operation used during the specific date range. The Total columns display the total number of times the code was used, the number of units sold, and the total sale amount for each code. The Average columns display the average number of units sold and the average sale amount for each code.

| Warranty Labor Op Usage                  |                   |       |        |                   |       |
|--|-------------------|-------|--------|-------------------|-------|
| For Period From 06/01/2008 To 06/30/2008 |                   |       |        |                   |       |
| OP Code                                  | ----- Total ----- |       |        | ---- Average ---- |       |
|  | Usage             | Units | Sales  | Units             | Sale  |
| 26860303                                 | 9                 | 48    | 64.40  | 5                 | 7.16  |
| 85410000                                 | 5                 | 40    | 212.40 | 8                 | 42.48 |
| 85333333                                 | 2                 | 6     | 31.86  | 3                 | 15.93 |

## Print 'Come Back' Report

Use this button to print a list of customers who returned for a duplicate repair for a specific date range. This report is generated based on the **Comeback** field on the Close Service screen when the repair order is being generated. When prompted, type the beginning and ending dates you want to use for the report.

The report lists the original repair order number and the comeback repair order number. For each repair order, the printout lists the customer's name, service performed, writer, technician, and sale amount.

| Service Come-Back's                       |            |                                     |    |    |       |
|---|------------|-------------------------------------|----|----|-------|
| For Period From: 06/01/2008 To:06/30/2008 |            |                                     |    |    |       |
|   |            |                                     | SR | TN | Sale  |
| Original: 20001                           | 06/01/2008 | SIENNA METZ<br>BRAKE PEDAL VIBRATES | 02 | 05 | 27.50 |
| Comeback: 20020                           | 06/22/2008 | SIENNA METZ<br>BRAKE PEDAL VIBRATES | 01 | 05 | 27.50 |



## Service Discounts

Use this button to print a report of the discounts applied repair orders for a specified period. The printout separates discounts for customer pay, internal, and warranty. For each repair order, the printout lists the R/O number, service date, service writer, customer name, sale amount and discount amount for service and parts, tax discount, and total discount.

| ABC Motors                                |          |         |              |        |      |       |      |      |       |       |
|---|----------|---------|--------------|--------|------|-------|------|------|-------|-------|
| Service Discounts - Customer Pay          |          |         |              |        |      |       |      |      |       |       |
| For Period From: 06/01/2008 To:06/30/2008 |          |         |              |        |      |       |      |      |       |       |
| R/O                                       | Date     | Writer  | Name         | Labor  |      | Parts |      | Tax  | Total |       |
|   |          |         |              | Sale   | Disc | Sale  | Disc | Disc | Disc. |       |
| 41318                                     | 06/09/08 | 01-Bill | LARRY MILLER | 75.00  | 7.50 | .00   | .00  | .00  | 7.50  | 10.0% |
| 41331                                     | 06/14/08 | 06-Adam | MICHELE KATT | 65.00  | .00  | 6.80  | .48  | .00  | .48   | .7%   |
|   |          |         |              | 140.00 | 7.50 | 6.80  | .48  | .00  | 7.98  | 5.4%  |
| Writer 01                                 |          |         |              | 75.00  | 7.50 |       |      |      | 10.0% |       |
| Writer 06                                 |          |         |              | 71.80  | .48  |       |      |      | .7%   |       |

## GM Input Sheet

GM dealers use this button to generate a report that identifies the Service and Body Shop units that were sold for the month and year to date. The printout lists the units for customer pay, service contract, and quick service, warranty, internal, and new vehicle inspection. Dealers use the printout to assist them as they prepare their financial statement for the month. When prompted, type the month for the report, and select your print criteria.

| GM Input Sheet                         |         |        |           |       |
|--|---------|--------|-----------|-------|
| For Month: 06                          |         |        |           |       |
|  | SERVICE |        | BODY SHOP |       |
|  | MONTH   | Y-T-D  | MONTH     | Y-T-D |
| CUSTOMER + SERV CONTRACT + QUICK SERV: | 443.0   | 3949.2 | 0.0       | 3.9   |
| WARRANTY:                              | 48.7    | 1067.3 | 0.0       | 66.8  |
| INTERNAL:                              | 149.9   | 1666.4 | 0.0       | 18.9  |
| NEW VEHICLE INSPECTION:                | 30.1    | 191.2  |           |       |

## Op Code Detail

This button advances you to the Op Code Detail menu. Use this menu to generate an operation code detail report. This helps you identify the Op code used for each repair order. This list provides important information about the Op code usage for your analysis. You use the first menu option to generate the detail for a specific date range. You can then view all the detail or use the remaining menu options to view the information using a specific filter.



### Generate Op Code Detail

First, use this button to generate the operation code detail for a specific date range. The generated detail you can view using this option includes information for all repair orders in the selected date range.

1. Click **Generate Op Code Detail**.
2. Type the date range you want to use to compile the data.
3. When prompted to verify your printer is ready, select your print criteria.
4. The system prompts you to indicate if you want to include repairs that do use labor op codes. Click **Yes** or **No**.
5. The system prompts you that the information on the printed report is a partial representation of the compiled data. It also includes the location where the **OPDETAIL.TXT** file is located. Click **OK** to continue.
6. The system prompts you with the location where the **OPDETAIL.XLS** file is located. Click **OK** to continue.

The program generates three files when you select to generate the report:

- **REPORT.PDF:** This file displays on the screen when you select **To Screen** as your print option. The same information print when you select **To Printer** as you print option. Please note that size limitations allow this file to display only a partial representation of the generated data. The printout lists the following information: advisor/writer ID, RO number, repair number, Op code, pay type, closed date, vehicle's VIN, make, and model, technician ID, and the customer's name.
- **C:\ASIXL\OPDETAIL.XLS:** This is a Microsoft Excel file. You can only view and edit the file in Microsoft Excel. Once you edit the data, you can save it as an Excel file or comma delimited file (CSV) so you can attach the file to an e-mail message to send to third-party vendors as needed. The file includes the following information: advisor/writer ID, RO number, repair number, Op code ID, Op code description, repair labor amount, sold labor units, actual labor units, repair cost, total RO parts price, total RO parts cost, Vehicle model year, odometer, labor type, ZIP code, RO closed date, VIN, make, model, technician ID, and the customer's name, address, city, state, home phone number, work phone number, and e-mail address.
- **C:\ASITEXT\OPDETAIL.TXT:** This is a comma delimited text file. You can view and edit the file in any text editing program (WordPad, NotePad, Microsoft Word, etc.). This file can also be attached to an e-mail message to send to third-party vendors as needed. This file includes the same information included in the XLS file.

### Op Codes By Code

Use this button to view or print just the information from the generated data for a specific Op code.

1. Click **Op Codes By Code**.
2. The system identifies the dates for the generated data. Click **OK** to continue.
3. Type the Op code you want to use for the report.
4. When prompted to verify your printer is ready, select your print criteria.

### Op Codes By Advisor/Writer

Use this button to view or print just the information from the generated data for a specific advisor/writer.

1. Click **Op Codes By Advisor/Writer**.
2. The system identifies the dates for the generated data. Click **OK** to continue.
3. Type the advisor/writer ID you want to use for the report.
4. When prompted to verify your printer is ready, select your print criteria.

## Op Codes By Tech

Use this button to view or print just the information from the generated data for a specific technician.

1. Click **Op Codes By Tech**.
2. The system identifies the dates for the generated data. Click **OK** to continue.
3. Type the technician ID you want to use for the report.
4. When prompted to verify your printer is ready, select your print criteria.

## Payroll Time Flags

Service Managers use the Service Time Flags menu to pre-edit the payroll time flags. This allows a technician's pay to include times from open and closed repair orders. The information automatically updates to the Payroll Service Time Flags so Accounting can post the information to the current payroll.

| Technician Time Flags (ABC Motors) |                    |
|------------------------------------|--------------------|
| Enter Pre-Flag Times               | Service Time Flags |
| Compile Flag Data                  |                    |
| Edit Compiled Data                 |                    |
| Print Flag Data                    |                    |
| Exit                               |                    |

1. Use the **Enter Pre-Flag Times** button to add time for open repair orders.
2. Compile the flag data. This will compile the data for closed repair orders and any information added for open repair orders.
3. Use the **Edit Compiled Data** button to edit the compiled data.
4. Print the flag data for your records.

## Enter Pre-Flag Times

The Service Manager uses this feature to pre-edit the payroll time for open repair orders. This allows a technician's pay to include times from open repair orders. When the payroll clerk compiles the Service Time flags, the system will pull the open repair orders the Service Manager edited. The edited data will display when the repair order is selected on the Edit Compiled Data Screen on the Service Time Flags menu in Payroll and will update when the Payroll Clerk selects to update the flag times to the current pay.

1. Click **Enter Pre-Flag Times**. The Payroll Time Pre-Flags screen appears.
2. The right side of the screen displays the open repair orders. Click a repair order. The repair order number, customer's name, and vehicle make and model fill in the fields at the top of the screen.
3. Click the repair you want to select. Any previously paid flags on the repair fill in the **PPFU** field (Prior Pre-Flag Units).

| TN | PFU | PPFU | CT | AT |
|----|-----|------|----|----|
| 1  | 08  |      | 4  | 4  |
| 2  |     |      |    |    |
| 3  |     |      |    |    |
| 4  |     |      |    |    |
| 5  |     |      |    |    |
| 6  |     |      |    |    |
| 7  |     |      |    |    |
| 8  |     |      |    |    |
| 9  |     |      |    |    |
| 10 |     |      |    |    |
| 11 |     |      |    |    |
| 12 |     |      |    |    |
| 13 |     |      |    |    |
| 14 |     |      |    |    |
| 15 |     |      |    |    |

4. The **CT** field displays the charged time units for the repair, and the **AT** field displays the actual time units for the repair.
5. Type the total units for the repair in **PFU**. If the repair order is open and flagged over more than one payroll, the payroll program will do the calculation. This is only when a repair order is open and flagged over more than one payroll.

For example, the first week the technician puts 2 hours on a job. The Service Manager enters 20 units as the pre-flag time, and the technician's pay includes the 20 units. By the end of the second week, the job is still not finished, and now the technician has a total of 5 hours on the job. The Service Manager will now enter 50 units, the total time on the job. When the payroll program compiles the flags, the technician will be paid for 30 units for this pay because he was paid for 20 of the 50 units last pay.

6. Click **Save**. Continue to work your way through the list of repair orders.

## Compile Flag Data

Use this button to compile flag time data. This compiles information for closed repair orders and any information added for open repair orders.

1. Click **Compile Flag Data**.
2. Use the drop-down calendars to select the date range for the compiled data.
3. Click **Go**.
4. Click **OK** when prompted to verify you want to compile the data.

**Tip:** Click **Refresh Flag Data** on the Compile prompt to refresh the time flag data to ensure it is accurate. Click **Refresh** again when prompted to verify you want to refresh the data.

## Edit Compiled Data

Use this button to open the Edit Technician Time Flags screen to edit the compiled time flag data.

| R/O   | Date   | Units | Cost | Paid |                |
|-------|--------|-------|------|------|----------------|
| 06968 | (Open) | 3     | 4.50 | .00  | ROBERT L SMITH |
| 06971 | (Open) | 2     | 3.00 | .00  | CHARLES WILSON |
|       |        | 5     | 7.50 | .00  |                |

### Editing the Cost on a Repair Order

1. Click **Edit Compiled Data**.
2. Click the technician you want to select in the list window on the left side of the screen.
3. The window on the right side of the screen displays a list of repair orders pulled for the technician. Click a repair order to select it. (You can view a summary of the repair order by clicking **View R/O**.)
4. If the repair order has been updated to the schedule, the labor cost appears under the Labor Cost field. This allows you to see the amount that was entered into the schedule so you can correct the information if necessary.
5. The **Labor Units** field displays the time units for the repair, and the **Labor Cost** field displays the cost for this repair order. Edit these amounts as needed.
6. Click **Save** to save the information.

### Removing a Repair Order

Use the following instructions to remove a selected repair order from a technician's list.

1. Select the technician and repair order.
2. Click **Remove**.
3. Click **Gone** when prompted to verify you want to delete the record.

### Adding a New File

You should use the Work In Process Worksheets to add new files on this screen.

1. Select the technician.
2. Type the repair order number, or click **Open R/O's** to select the R/O from a list of the open repair orders for the selected technician.
3. Click **OK** when prompted that the system will create a new record.
4. Type the labor cost.
5. Click **Save**. The repair order is added to the list on the right side of the screen.

## Removing the Compiled Data

Use the **Remove Compiled List** button to remove all of the compiled information. If you decide you want to use the Service Time Flag data, you will have to recompile the information.

1. Click **Remove Compiled List**.
2. Click **Gone** when prompted to verify you want to delete the information.

## Viewing Previously Paid Time Flags

Use the View Previously Paid Flags button to view all of the previously compiled time flags that have been updated to payroll.

1. Click **View Previous Paid Flags**.
2. Click an R/O in the list to view the R/O on your screen.
3. Click **Back** to close the R/O or the View Previous Paid Flags screen.

## Print Flag Data

Use this button to print the compiled data. This lists all of the repair orders for each technician and the total labor cost. When prompted to verify your printer is ready, select your print criteria.

## Monthly Summary Update

Use this button to perform a monthly update of your service data. This compiles all the service data and makes it available for the reports that depend on the monthly update to bring the service information up to date. The accuracy of the reports that are updated during the monthly update depends on the day of the month you perform the update. For example, if you do not run your monthly update until the 5<sup>th</sup> day of the following month, your service data will be off by five days. If you run the monthly update at the end of business on the last day of the month, your service data will be up to date.

**Important:** All workstations must exit the Service Writing Module during the update. Similarly, no one can be in the Service R/O section or have a repair order open in the Parts Inventory module.

1. Click **Monthly Summary Update**.
2. Type the month and year you are updating. This is the *previous* month. For example, you update June's data in July. Never update the current month.
3. Click **OK** when prompted to verify you want to run the update.
4. The "Last Monthly Update Was" date on the menu changes to the month and year used for the update. The "Completed On" date displays the current date.



## R/O Archives

This button advances you to the R/O Archives menu. The R/O Archives menu is used to archive repair orders. When you archive a repair order, it is turned into a PDF file and stored on the local hard drive. Several years of records can be maintained on the local drive.

This menu also provides a method for viewing your archived repair orders and burning them to a CD for backup. Because the system backup does not include making a backup of the local drive, the records may be lost due to hardware failure or other unforeseen accidents. By “burning” the files to a CD, you ensure the records are safely backed up. Several copies should be made so a copy can be stored off-site in a safety deposit box (or other safe location).



### Archive Repair Orders

The first step is to archive the repair orders. This converts the files to a PDF document.

1. Click **Archive Repair Orders**.
2. In the **From** and **To** fields, type the start and end repair orders. All of the repair orders within the range will be archived. To archive a single repair order, type the repair order number in both the **From** and **To** fields.

A screenshot of a dialog box titled "Archive Repair Orders". It contains two input fields. The first field is labeled "From R/O:" and has the value "20000" entered. The second field is labeled "To R/O:" and has the value "29999" entered. There is a small rectangular area below these fields, likely for a message or confirmation.

3. Click **OK** when prompted to verify you want to archive the records.
4. If there are missing repair orders 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.

## View Archived Repair Orders

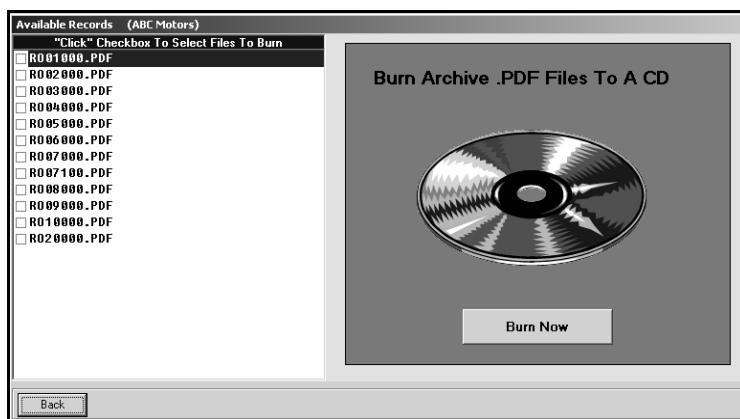
Click **View Archived Repair Orders** to view a list of the archived repair orders. The system displays a list of available PDF files. Each file will be named for the corresponding repair order or the first repair order entered in a sequence. For example, if you save repair orders from 10000 to 19999, the file will be named RO10000.

1. Click **View Archived Repair Orders**.
2. Click the file you want to view in the Archive List. The repair order will open for viewing and printing. If there is more than one repair order in the file, use the arrow keys on the toolbar or on your keyboard to scroll through the repair orders.
3. When you are finished viewing the repair order, click **File**, and click **Exit**.

## Burn Archives To CD

Use this button to burn the repair orders stored on your local drive to a CD. The computer you are working on must have a CD burner installed. Store the backup CD in a safe place (fireproof safe, safety deposit box, etc) preferably offsite to ensure your records are protected.

1. Click **Burn Archives To CD**. The Burn Archive screen appears.



2. The left side of the screen lists all of the PDF files available for backup. Click the box to the left of the file to select it. A check mark appears in the box.
3. Once you have selected the files you want to burn, click **Burn Now**. The files are burned to the CD.
4. Click **Back** to Return to the R/O Archives menu.

**Tip:** When you “burn” the repair orders to the CD, you will not be able to access any records previously burned to the CD. Therefore, Autosoft suggests you use a separate disk for each archive. When you use a new disk, you only need to select the PDF file for the repair orders you just archived. However, if you choose to use the same disk over again, you must select all of the archived records to ensure you will be able to access all of the files.

## Remove An Archive File

Use this button to remove an archived repair order.

1. Click **Remove An Archive File**.
2. In the Archive List, click the PDF file you want to remove.
3. Click **OK** when prompted to verify you want to delete the file.
4. The file is removed from the archive list, and the system closes the list.

## Daily Service DOC

The Daily Operating Control screen allows the Service Manager to view the Service and Body Shop daily DOC. These DOC's are created in the Accounting module. The DOC will show the Service Manager where the Service Department stands with the respect to the general ledger figures on each day the DOC is compiled. The DOC must be compiled in the Accounting module before you can view the DOC in the Service module.

1. Click **Daily Service DOC**.
2. The screen automatically displays the Service DOC. Click **Body Shop** at the bottom of the screen to display the Body Shop DOC.
3. Click **DOC History** to view a list of DOC's that have been previously compiled.
4. Click **Comparison DOC's** to compare the current Daily DOC with a DOC from the DOC history.
5. Click **Print** to print the DOC. When prompted to verify your printer is ready, select your print criteria.

**Tip:** Use the **Allow Parts To View My DOC's** box to determine if the Parts Department can view the Service DOC. If you select the box, the **Service** and **Body** buttons on the Parts Daily DOC screen will be available. If you leave the box empty, the **Service** and **Body** buttons on the Parts Daily DOC screen will be unavailable.

## Report Generator

The Report Generator is used to create user-defined reports. This allows you to pull the information you want from your Autosoft DMS system. Once you generate a report, you can save the settings and use the report to pull information in the future. Please refer to the *Autosoft Report Generator User Guide* that came with your Autosoft DMS software for complete instructions on how to use the Report Generator. You can access a PDF version of the manual from the help pages in the Report Generator.