

# **Advanced Service Writers Productivity (ADV)**

**User Guide**

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# Getting Started

This guide describes the use of your ADV software on the ADP Accounting System. Read and perform each step in this guide before using the ADV system.

## *Overview*

Your new **ADV** enhancement offers you:

- To pay writers off, based on either sales or gross, and for any General Ledger account numbers you like.
- The report shows base, commission percent, and commission for any period of time you desire.

## *Typing Conventions*

- When you read the instruction *<Enter>* hit the carriage return.
- The forward-slash key ("/") will get you out of any screen and will abort all updating.
- The period key (".") will move the cursor directly to the processing prompt.

## ***Start Here***

- Make sure that your ADV application is loaded onto your system.
- You can verify this by typing in "**ADV**" at the Function prompt while in the Service system.
- If the ADV Main Menu displays, then proceed. *If the message "Invalid Routine Name" or "Invalid Function" displays, then call your Customer Service Representative to correct the problem.*
- Setup your service writers with their appropriate commission plans. This only has to be done one time – see the instructions beginning on page 2 for instructions.
- After the setups are done, you are ready to use the system. Run the CAP function (Calculate Advisor Productivity) to calculate figures based on the setups you have specified. Each time you change setups, re-run CAP and new results will be calculated.

## Organization of This Manual

The figure below shows the Main Menu screen of the ADV application. Each chapter in this manual will demonstrate a Main Menu function of the ADV system and review prompts and responses for that operation. As illustrated in the example below, the bold item indicates a prompt for user input and the paragraphs beneath it are the user options and instructions for continuing the operation.

At the Function prompt, enter "**ADV**". The ADV System Main Menu is displayed.

```
(c) Copyright 1991 Car Ink, Inc.                305-461-0327        DDMMYY
          A D V A N C E D   S E R V I C E   W R I T E R ' S
                P R O D U C T I V I T Y

          SAD  SETUP ADVISORS
          SOB  SET OBJECTIVES
          CAP  CALCULATE ADVISOR PRODUCTIVITY
          RAP  PRINT ADVISOR PRODUCTIVITY
          MSU  MANAGEMENT SUMMARY OF OBJECTIVES
          ROD  REPAIR ORDER DETAIL
          APE  AUDIT PID ERRORS
          PAF  PURGE ADVISORS FILES

ENTER (ADV) MENU FUNCTION ?
```

**Figure 1 ADV Main Menu**

### **ENTER (ADV) MENU FUNCTION?**

At this prompt, type in the menu selection you want to access and hit the *<Enter>* key to continue.

# SAD - Setup Advisors

The first thing you must do is setup your service writers. This only has to be done one time. However, you can later change setups and retroactively calculate the reports. For example, you might set your advisors up to be paid on percent of sales. After you print the report, you change them to percent of gross and see how the figures come out.

### ENTER (ADV) MENU FUNCTION ?

At this prompt, enter **SAD**. The Service Writer Setup Screen, shown in the figure below, is displayed.

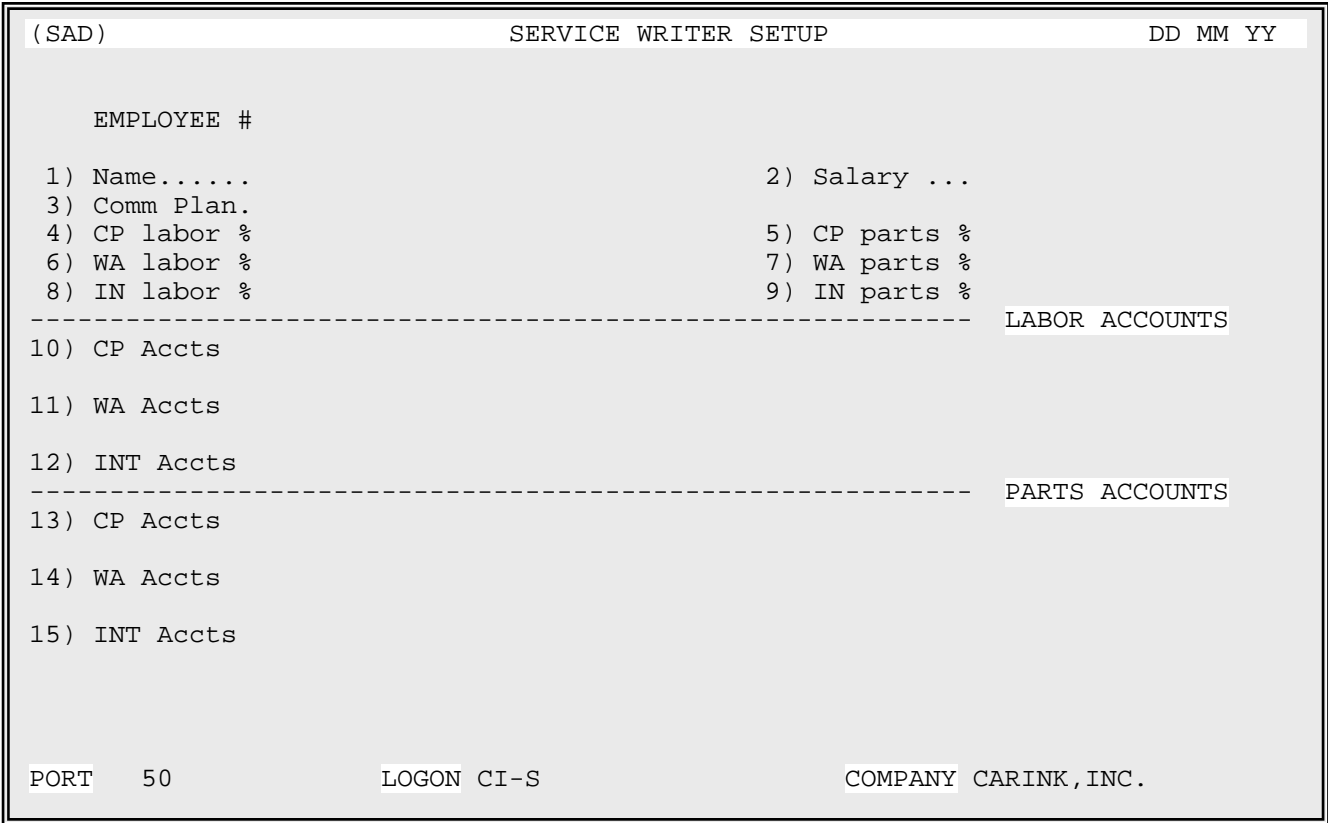


Figure 2 Setup Advisors Screen

## Setting up a New Service Writer

### **EMPLOYEE #:**

At this prompt, enter a valid service writer number. The number must be setup in your ROI system first. If the number is not a valid writer number, the application lets you know.

The following prompt will appear:

### **New item (Y/N) or (C)opy setup from another advisor**

If this is the first advisor you are setting up you must answer "Y".

If you have already setup one advisor, you can answer "C" and copy the setups from another advisor number.

### **NAME:**

The advisor's name will automatically be pulled from your service system setup. You can change it now if you like.

### **COMM PLAN**

Enter a valid commission plan:

- 0 Do not calculate commission
  - 1 Percent of Sales
  - 2 Percent of Gross
  - 3 Dollars per/hours sold
- You can have different plans for different advisors if you wish.
  - You can also change plans and recalculate to see what effect different pay plans would have.

### **PERCENTAGES**

You can setup 6 different percentages. Enter percentages to 3 decimal places. For example, to enter 5% type in 5000. To enter 8.5% type in 8500. If you do not pay off this item, enter in 0.

### **GL ACCOUNTS**

You can enter any valid sale or cost of sale account numbers. You can be as selective as you wish. For example, you might want to pay off of internal labor, but not on PDI internals. In this case, enter the internal labor accounts but not the PDI

labor account. If you have questions concerning accounts, your controller can help you.

If the commission plan is 2 for GROSS PROFIT, please input the cost of sale accounts that correspond to the sale accounts.

When you are finished entering the data, the bottom of the screen will prompt you for options:

**(A)cccept (S)ublet screen (D)elete (E)xit -or- #**

Type in **"A"** to accept your selections. This will file the record in the system.

### Copying a Service Writer Setup

This feature allows you to copy setups from advisor to advisor so that you only have to setup the details on one advisor.

**EMPLOYEE #:**

At this prompt, enter a valid service writer number. The number must be setup in you ROI system first. If the number is not a valid writer number, the application lets you know.

The following prompt will appear:

**New item (Y/N) or (C)opy setup from another advisor**

Answer **"C"** and copy the setups from another advisor number. The computer will ask you which advisor number to copy from. Enter a valid advisor number.

**NAME:**

The advisor's name will automatically be pulled from your service system setup. You can change it now if you like.

**COMM PLAN**

Enter a valid commission plan:

- 0 Do not calculate commission
- 1 Percent of Sales
- 2 Percent of Gross
- 3 Dollars per/hours sold

- You can have different plans for different advisors if you wish.
- You can also change plans and recalculate to see what effect different pay plans would have.

After changing a commission plan you must perform the CAP function to recalculate service writer plans in order for the new criterion to be reflected in any reports.

### **PERCENTAGES**

You can setup 6 different percentages. Enter percentages to 3 decimal places. For example, to enter 5% type in 5000. To enter 8.5% type in 8500. If you do not pay off this item, enter in 0.

### **GL ACCOUNTS**

You can enter any valid sale or cost of sale account numbers. You can be selective as you wish. For example, you might want to pay off of internal labor, but not on PDI internals. In this case, enter the internal labor accounts but not the PDI labor account. If you have questions concerning accounts, your controller can help you.

If the commission plan is 2 for GROSS PROFIT, please input the cost of sale accounts that correspond to the sale accounts.

The bottom of the screen will prompt you for options:

**(A)cccept (S)ublet screen (D)elete (E)xit -or- #**

Type in **"A"** to accept your selections. This will file the record in the system.

#### Modifying a Service Writer Record

**EMPLOYEE #:**

At this prompt, enter the number of the service writer record you wish to modify. The employee's record will appear on the screen, and the cursor will be at the bottom of the screen prompting you for the following options:

**(A)cccept (S)ublet screen (D)elete (E)xit -or- #**

Enter in the number of the field (1-14) you wish to modify to send the cursor up to the field. At the field prompt, enter in **."** to get back down to the options prompt. When you have finished, type in **"A"** to accept your selections. This will file the record in the system.

#### Deleting a Service Writer Record

**EMPLOYEE #:**

At this prompt, enter the number of the service writer record you wish to delete. The employee's record will appear on the screen, and the cursor will be at the bottom of the screen prompting you for the following options:

**(A)cccept (S)ublet screen (D)elete (E)xit -or- #**

Type in **"D"** to delete a record. Use this if you entered the wrong advisor number or wish to remove an advisor from the reports.

#### Canceling the Transaction

From any field prompt, enter in **."** to get back down to the options prompt.

**(A)cccept (S)ublet screen (D)elete (E)xit -or- #**

Type in **"E"** to exit and the application will not file any record or changes.

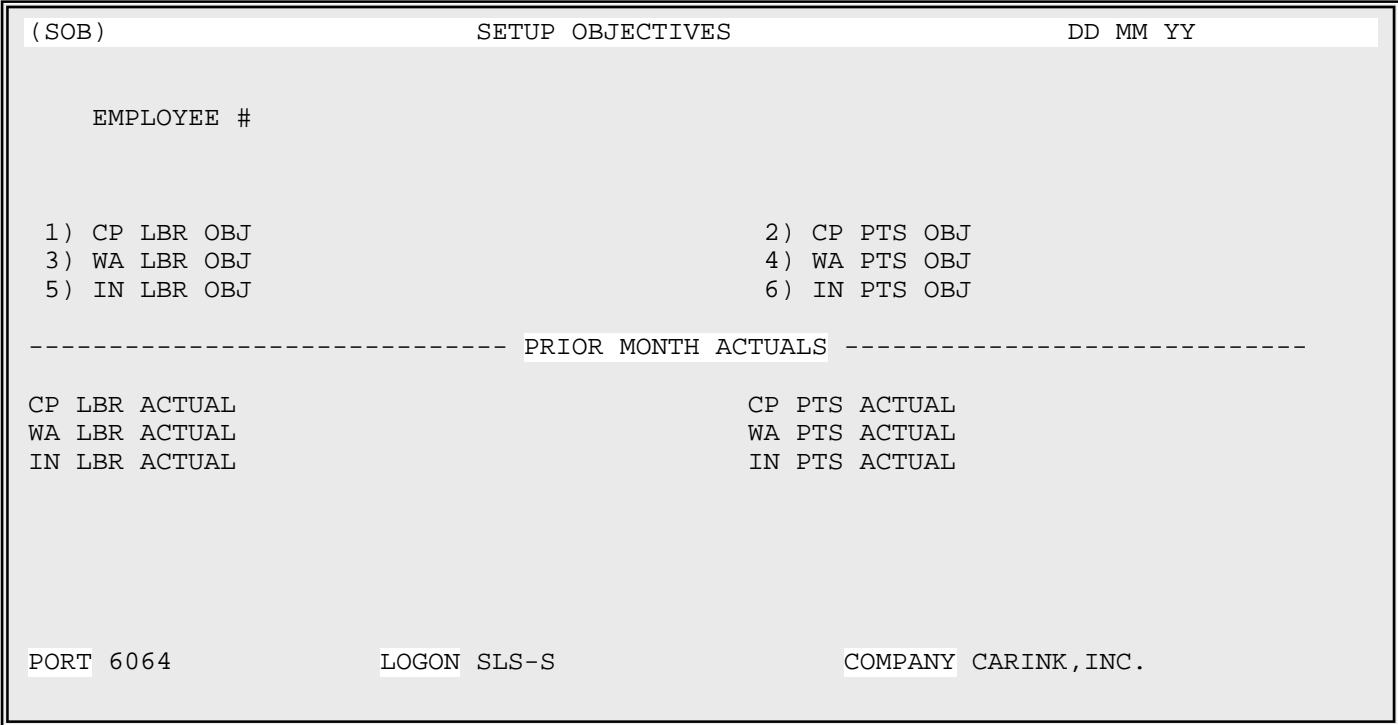
# SOB - Set Objectives

This setup screen is optional. You can setup objectives for your writers in each of the 6 categories.

- Customer Pay Labor
- Customer Pay Parts
- Warranty Labor
- Warranty Parts
- Internal Labor
- Internal Parts

### ENTER (ADV) MENU FUNCTION ?

At this prompt, enter **SOB**. The Service Writer Setup Screen, shown in the figure below, is displayed.



**Figure 3 Setup Objectives Screen**

The report MSU will give you the results of these objectives.

# CAP - Calculate Advisor Productivity

After the setups are done, you are ready to use the system. Run "**CAP**" to perform the productivity calculation based on your setups. If you go back and change setups, re-run CAP and new results will be calculated. This application verifies all calculations in Accounting if you have an accounting interface. You can put the application to sleep if you desire so that you can print your report (RAP) in the morning. If you put this application to sleep, you should make sure it runs after PID has run. However, this is not required. The CAP application is very independent! You can run it during the day or in the morning if you desire.

## **ENTER (ADV) MENU FUNCTION ?**

At this prompt, enter "**CAP**". The Service Writer Setup Screen, shown in the figure below, is displayed.

The application will display the Calculate Advisor's Prod screen, prompting to run the calculation now or later.

```
(c) Copyright 1991 Car Ink, Inc.          305-461-0327      DDMMYY
                                     C A L C U L A T E   A D V I S O R ' S   P R O D
Run this function (N)ow -or- (L)ater ....
```

**Figure 4 Calculate Advisor Productivity Screen**

### Running the Calculation Later

#### **Run this function (N)ow -or- (L)ater...**

If you choose to put the application to sleep, type "L" at the prompt and hit the <Enter> key. The application will display a new prompt asking you to schedule the wakeup time.

#### **Wakeup Time ....**

When the application prompts for wake-up time, enter the time in military format.

Example:

18:00 -is- 6:00p.m

01:00 -is- 1:00a.m

Hit the <Enter> key to save your selection.

### Running the Calculation Now

#### **Run this function (N)ow -or- (L)ater...**

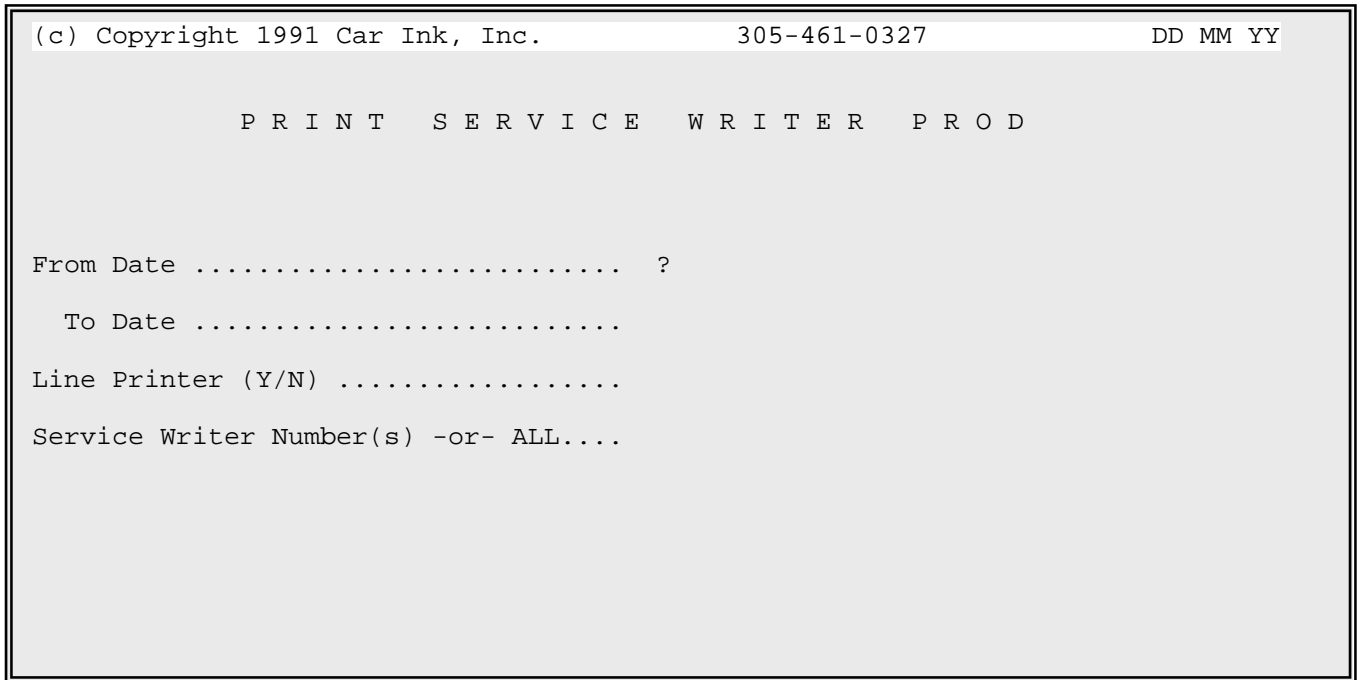
Type "N" at the prompt and hit the <Enter> key.

# RAP - Print Advisor Productivity

Function RAP prints your productivity report. The prompts are self-explanatory. Enter dates in standard format.

## ENTER (ADV) MENU FUNCTION ?

At this prompt, type “RAP” and hit the <Enter> screen. The Multi Server Production Screen is displayed, prompting you for the beginning date of the reporting period.



**Figure 5 RAP Screen**

### Viewing the Report On-Screen

#### **From Date** .....

This prompt is asking you for the beginning date of the reporting period. It uses a DDMMYY format, for example, “31AUG99”. Type it in and hit the <Enter> key to display the next prompt.

**To Date .....**

This prompt is asking you for the ending date of the reporting period. It uses a DDMMYY format, for example, "31AUG99". Type it in and hit the <Enter> key to display the next prompt.

**Line Printer (Y/N)**

Enter 'N' to view the information on your screen.

**Service Writer Number(s) -or- ALL**

Enter a specific service writer number or 'ALL' to run the report on all of your service writers.

Printing the Report

**From Date .....**

This prompt is asking you for the beginning date of the reporting period. It uses a DDMMYY format, for example, "31AUG99". Type it in and hit the <Enter> key to display the next prompt.

**To Date .....**

This prompt is asking you for the ending date of the reporting period. It uses a DDMMYY format, for example, "31AUG99". Type it in and hit the <Enter> key to display the next prompt.

**Line Printer (Y/N)**

Enter 'Y' to print to your local line printer.

**Service Writer Number(s) -or- ALL**

Enter a specific service writer number or 'ALL' to run the report on all of your service writers.

## RAP – Print Advisor Productivity

REPORT: BRAP		CARINK, INC. #AK 113489				RUN DATE: DD MON YYYY					
PAGE: 1		SERVICE DEPARTMENT				RUN TIME: HH:MM:SS					
S E R V I C E W R I T E R ' S P R O D U C T I V I T Y R E P O R T											
=====											
SWR#	DATE	CP LABOR	WARR LABOR	INT LABOR	TOTAL CP LABOR	WARR PARTS	INT PARTS	TOTAL PARTSPARTS	TOTAL PARTS	COMM COMMISS	BASE
-----											
109	04/15/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
109	04/17/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
109	04/18/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
109	04/19/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
109	04/20/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
109	04/21/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
109	04/22/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
109	04/24/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
109	04/25/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
109	04/26/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
109	04/27/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
109	04/28/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
109	04/29/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
109	05/01/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES

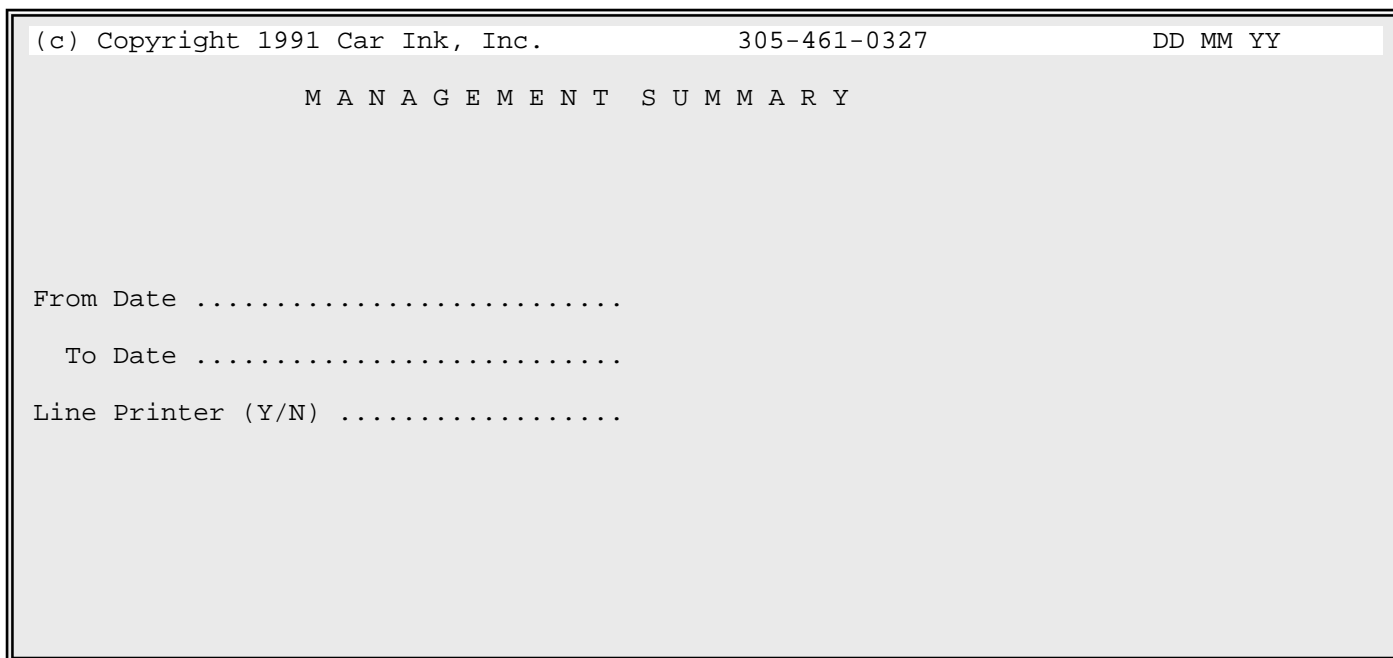
**Figure 6 Sample of Print Advisor Productivity Report**

# MSU - Management Summary of Objectives

Function MSU gives you a report based on the objectives you entered into function SOB. The prompts are self-explanatory. Enter dates in standard format.

## **ENTER (ADV) MENU FUNCTION ?**

At this prompt, enter "MSU". The Management Summary of Objectives is displayed, prompting you for the beginning date of the reporting period.



**Figure 7 MSU Screen**

### Viewing the Report On-Screen

#### **From Date .....**

This prompt is asking you for the beginning date of the reporting period. It uses a DDMMYY format, for example, "31AUG99". Type it in and hit the *<Enter>* key to display the next prompt.

**To Date .....**

This prompt is asking you for the ending date of the reporting period. It uses a DDMMYY format for example, "31AUG99". Type it in and hit the <Enter> key to display the next prompt.

**Line Printer (Y/N)**

Enter 'N' to view the information on your screen.

**Service Writer Number(s) -or- ALL**

Enter a specific service writer number or 'ALL' to run the report on all of your service writers.

Printing the Report

**From Date .....**

This prompt is asking you for the beginning date of the reporting period. It uses a DDMMYY format, for example, "31AUG99". Type it in and hit the <Enter> key to display the next prompt.

**To Date .....**

This prompt is asking you for the ending date of the reporting period. It uses a DDMMYY format, for example, "31AUG99". Type it in and hit the <Enter> key to display the next prompt.

**Line Printer (Y/N)**

Enter 'Y' to print to your local line printer.

**Service Writer Number(s) -or- ALL**

Enter a specific service writer number or 'ALL' to run the report on all of your service writers.

# ROD - Repair Order Detail

Function ROD gives you the details of the commission calculation. If you would like to know how commission was calculated, this report will give you each RO and the calculation method. The prompts are self-explanatory. Enter dates in standard format. A sample of the report is shown in the figure below.

## ENTER (ADV) MENU FUNCTION ?

At this prompt, enter "ROD". The Repair Order Detail Screen is displayed, prompting you for the beginning date of the reporting period.

```

(c) Copyright 1996 ADP Dealer Services                                DDMMYY
                                R E P A I R   O R D E R   D E T A I L

From Date .....
  To Date .....
Line Printer (Y/N) .....
Service Writer Number(s) -or- ALL....

```

**Figure 8 Repair Order Detail Screen**

### Viewing the Report On-Screen

#### **From Date** .....

This prompt is asking you for the beginning date of the reporting period. It uses a DDMMYY format, for example, "31AUG99". Type it in and hit the <Enter> key to display the next prompt.

**To Date .....**

This prompt is asking you for the ending date of the reporting period. It uses a DDMMYY format, for example, "31AUG99". Type it in and hit the <Enter> key to display the next prompt.

**Line Printer (Y/N)**

Enter 'N' to view the information on your screen.

**Service Writer Number(s) -or- ALL**

Enter a specific service writer number or 'ALL' to run the report on all of your service writers.

Printing the Report

**From Date .....**

This prompt is asking you for the beginning date of the reporting period. It uses a DDMMYY format, for example, "31AUG99". Type it in and hit the <Enter> key to display the next prompt.

**To Date .....**

This prompt is asking you for the ending date of the reporting period. It uses a DDMMYY format, for example, "31AUG99". Type it in and hit the <Enter> key to display the next prompt.

**Line Printer (Y/N)**

Enter 'Y' to print to your local line printer.

**Service Writer Number(s) -or- ALL**

Enter a specific service writer number or 'ALL' to run the report on all of your service writers.

## ROD – Repair Order Detail

REPORT: BROD	CARINK INC. #AK 113489				RUN DATE: DD MM YYYY						
PAGE: 1	SERVICE DEPARTMENT				RUN TIME: HH:MM:SSPM						
R E P A I R   O R D E R   &   C O M M I S S I O N   D E T A I L											
RO#	DATE	CP LABOR	WARR LABOR	INT LABOR	TOTAL LABOR	CP PARTS	WARR PARTS	INT PARTS	TOTAL PARTS	TOTAL COMMI	COMM BASE
268869	04/15/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
270055	04/15/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
270388	04/15/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
270876	04/15/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
270945	04/15/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
270109	04/17/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
*****	04/15/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
271037	04/17/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
271041	04/17/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
271042	04/17/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
271044	04/17/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
271047	04/17/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES
271050	04/17/00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	SALES

**Figure 9 Sample of Report Order Detail Report**

# APE - Audit PID Errors

Function APE is an extra feature of the ADV system that gives you a report of any Ro's which have not yet been posted into accounting. Run the routine after the 1<sup>st</sup> of the next month to get an accurate report of the previous month.

Every night the PID function runs, you or your parts manager gets a report of PID errors. These errors occur for various reasons. The significant point, however, is that many PID error tickets never make it into accounting. For example, if a stock number was missing on an RO, ADP might put a posted date on the document and tell accounting to manually post it in. But no one knows if it in fact gets posted. This application checks each RO in accounting. If it can't find it, it tells you about it. Present the report to your controller if you have any APE errors.

The prompts are self-explanatory. Enter dates in standard format.

## **ENTER (ADV) MENU FUNCTION ?**

At this prompt, enter "**APE**". The Repair Order Detail Screen is displayed, prompting you for the beginning date of the reporting period.

```
(c) Copyright 1996 ADP Dealer Services          13JUL00
          A U D I T P I D E R R O R S

From Date .....
  To Date .....
Line Printer (Y/N) .....
```

**Figure 10 Audit PID Errors Screen**

**From Date .....**

This prompt is asking you for the beginning date of the reporting period. It uses a DDMMYY format, for example, "31AUG99". Type it in and hit the *<Enter>* key to display the next prompt.

**To Date .....**

This prompt is asking you for the ending date of the reporting period. It uses a DDMMYY format, for example, "31AUG99". Type it in and hit the *<Enter>* key to display the next prompt.

**Line Printer (Y/N)**

Enter 'Y' to print to your local line printer or 'N' to view the information on your screen.

# PAF - Purge Advisors Files

This function allows you to purge advisors files.

## **ENTER (ADV) MENU FUNCTION ?**

At this prompt, enter "**PAF**". The purge advisors files will purge all advisors files.