



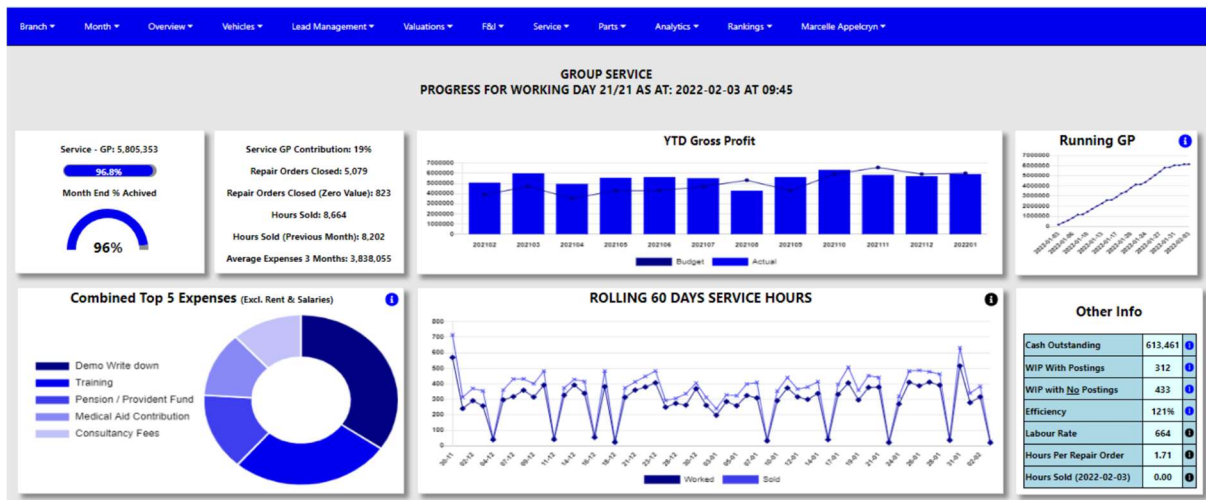
# SERVICE - SNAPSHOT

# Update Context

- 1.View.
- 2.Gross Profits / Units.
- 3.Info Widget.
- 4.YTD.
- 5.Running GP.
- 6.Expenses.
- 7.Rolling 60 days hours.
- 8.Other Info

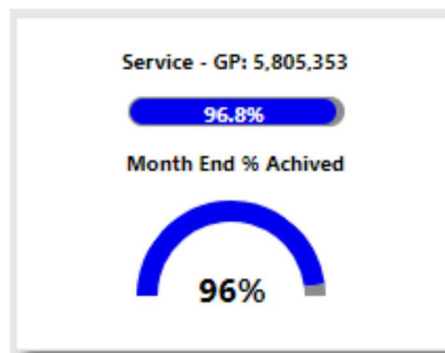
# 1. View.

The view consists service department information.



# 2. Gross Profit.

The system will calculate the gross profits month to date by the account type from the DMS system. There is 2 ways the system calculates this gross profit. It can include or exclude the Miscellanies Income accounts depending on group decision.



The progress bar will compare the actual to a month to date budget, the month to date budget is calculated by the full month budget and then it then calculates the working days for the budget. This will be the target month to date target.

The halfmoon compares the Month to date actual to the progress towards full month budget.

### 3. Info Widget.

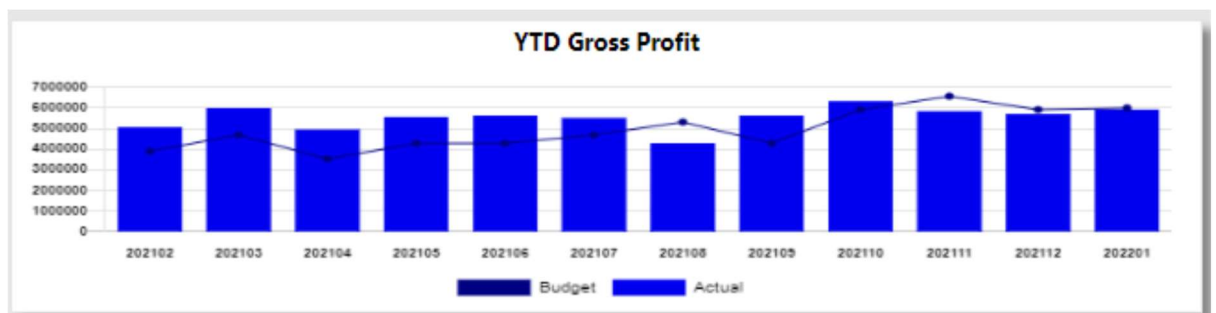
Depending on selection as above.



- Service GP Contribution → This display a calculation of what the department is contributing towards the total Gross profit for all departments.
- Repair Orders Closed → The Total of Repair Orders Closed for the selected month.
- Repair Orders Closed (Zero Value) → The total of Repair Orders Closed with no Costing.
- Hours Sold → Hours Sold for the selected month.
- Hours Sold (Previous Month) → Hours Sold for the previous month selected.
- Average Expenses 3 Months → Calculates the department average expenses for the last 3 months.

### 4.12 Month Gross Profit vs Budget.

This will display a 12-month progress against the budget.

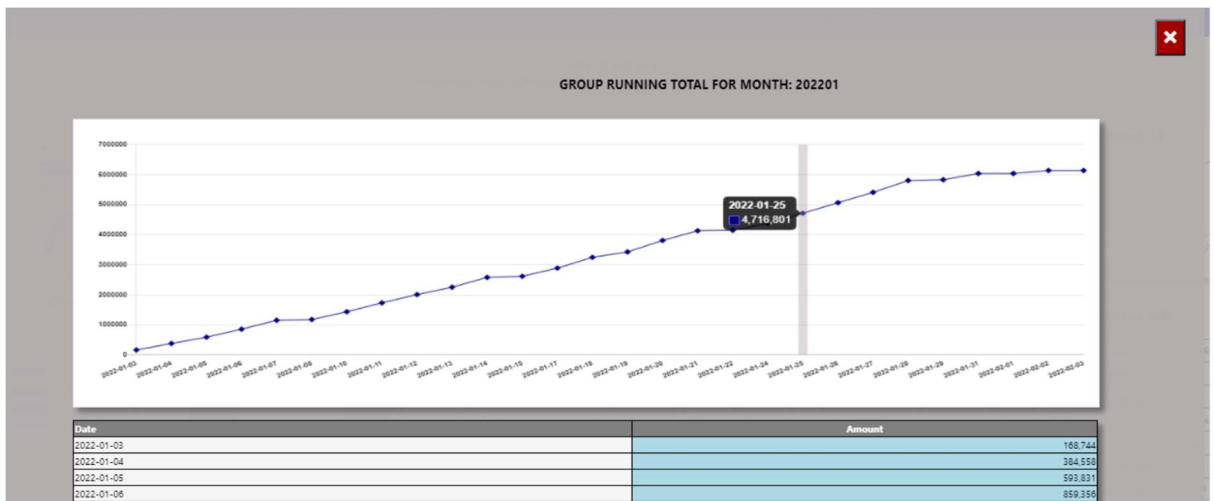


## 5. Running GP.

This is a running total for the gross profit in the service department.

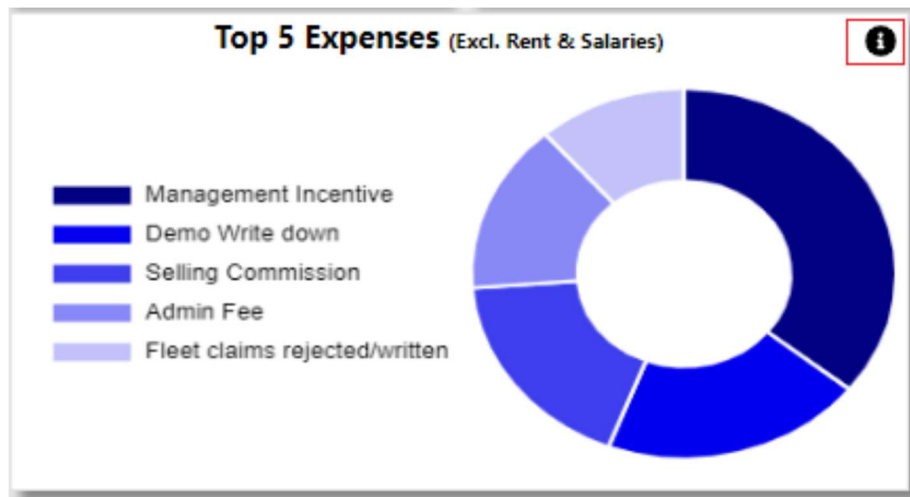


With the information Icon you can then drill down to the details.

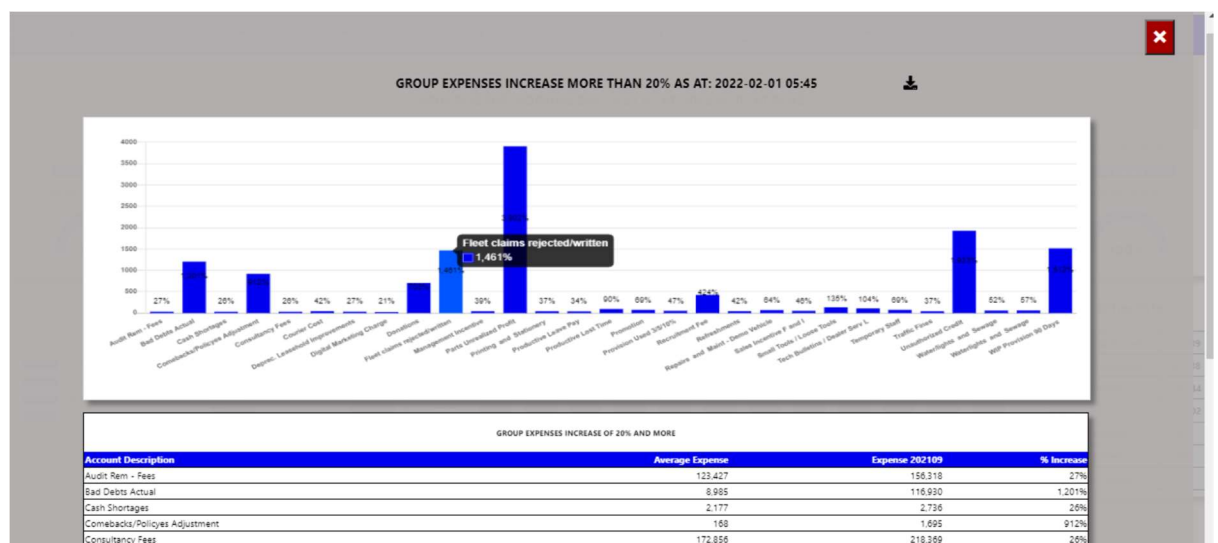


## 6. Top 5 Expenses.

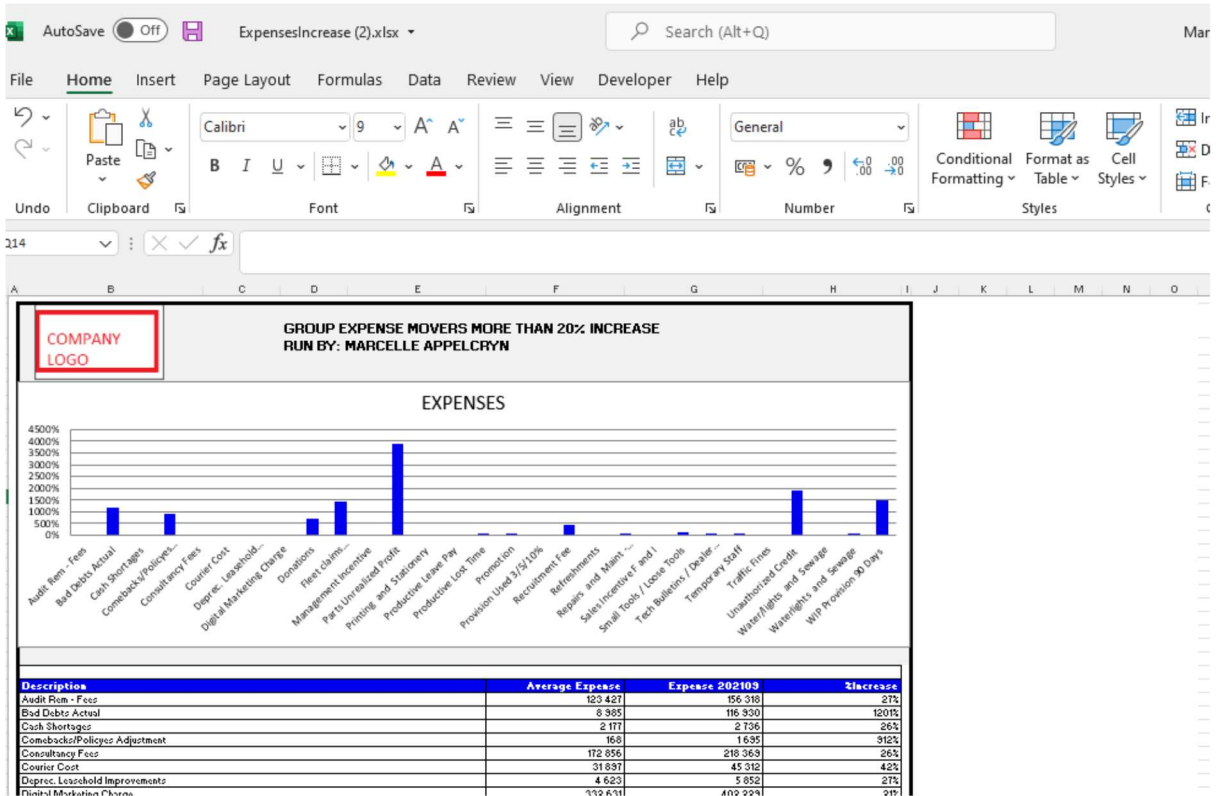
The top 5 expenses that is processed in the month that was selected will display in this graph excluding the rent and salaries expenses.



With the information icon you can then drill down to the expenses for the selected month where there was an increase more than 20%.

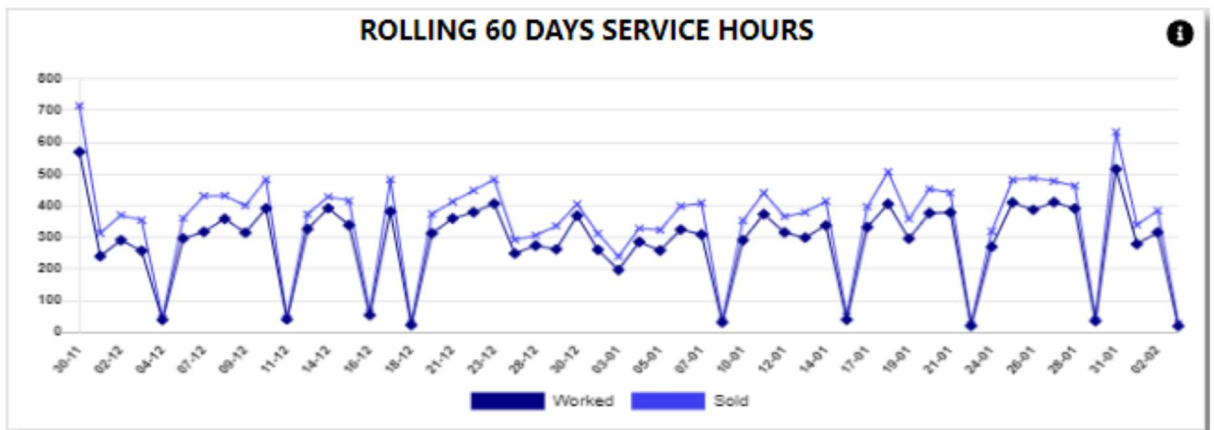


You can export the above view to excel including the graph and individual expense line that has increased more than 20%.



## 7. Rolling 60 days hours worked.

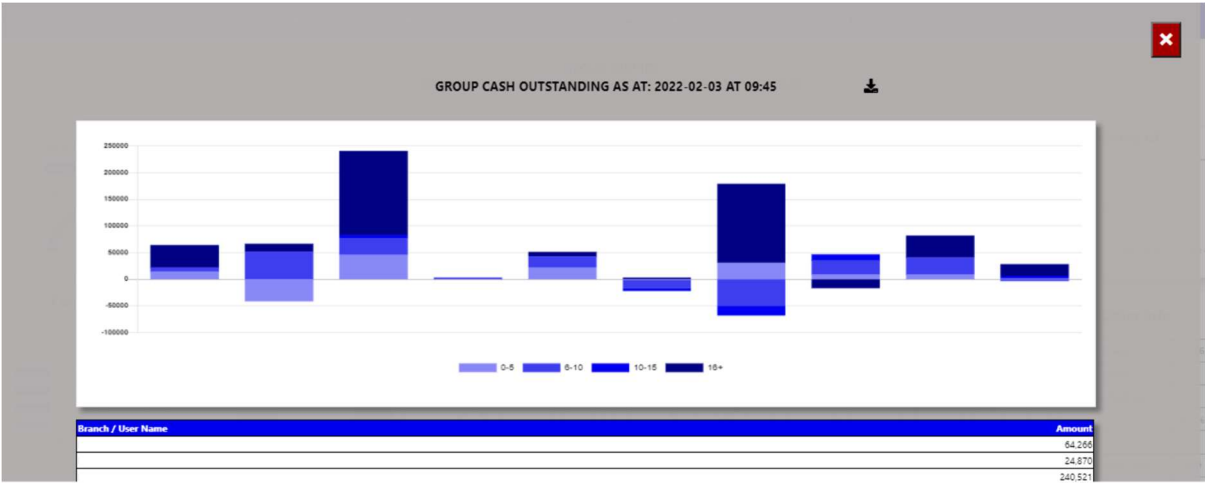
Display daily the hours worked vs hours sold for the previous 60 days.



# 8. Other Info.

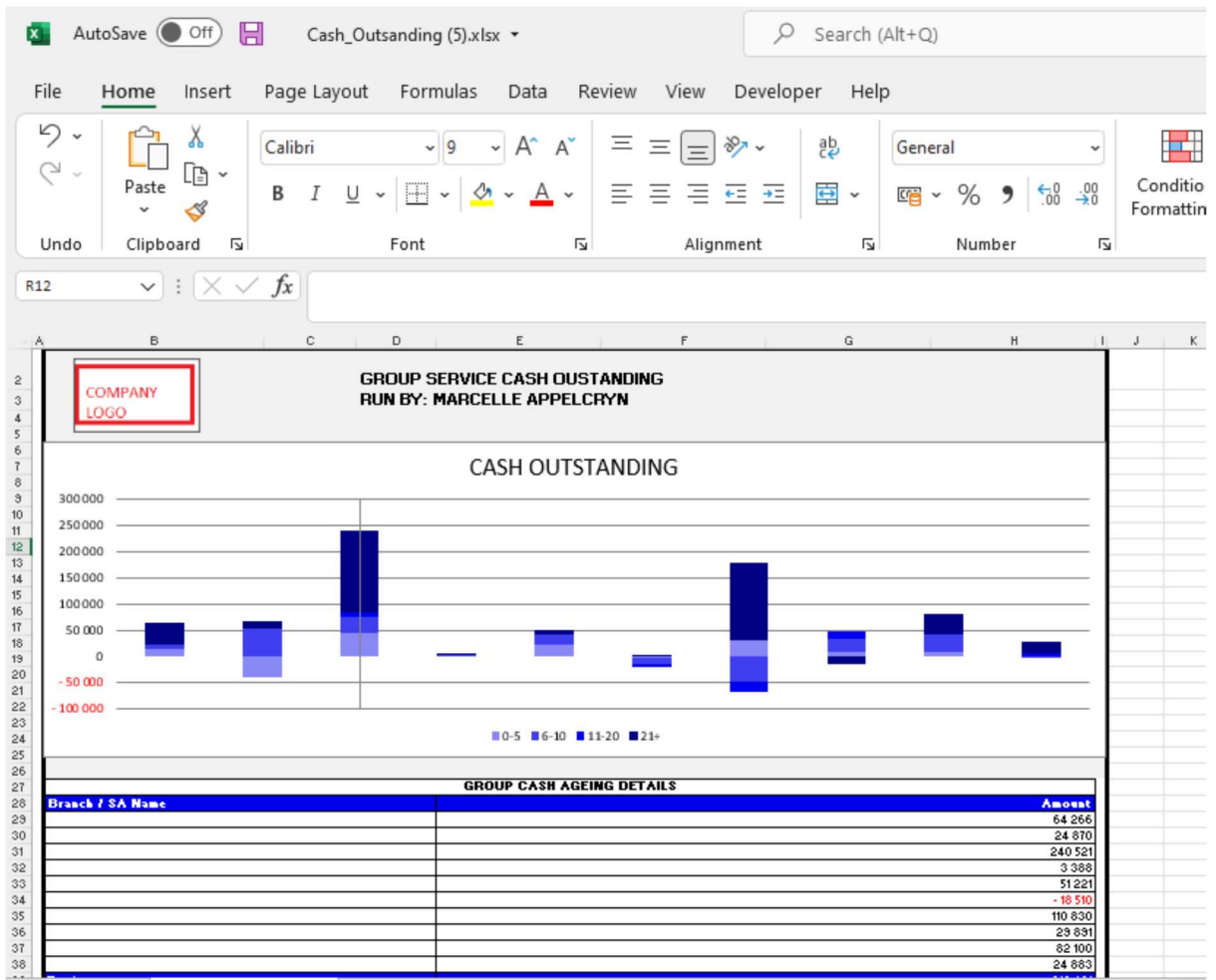
Other Info		
Cash Outstanding	613,461	<a href="#">i</a>
WIP With Postings	312	<a href="#">i</a>
WIP with <u>No</u> Postings	433	<a href="#">i</a>
Efficiency	122%	<a href="#">i</a>
Labour Rate	657	<a href="#">i</a>
Hours Per Repair Order	1.69	<a href="#">i</a>
Hours Sold (2022-02-03)	27.85	<a href="#">i</a>

a) Cash Outstanding – this calculates the cash outstanding for the department. The Info icon will then display a graph of the cash outstanding ageing for branch / service advisor.



You can then export this to an excel document with graph and the line items.





You can click a ageing bracket, and it will drill down to the transaction and its details. With an option to query this Repair Order from the BI tool.

- CASH OUTSTANDING FOR ALL

Home Branch	Account Number	Date	Amount	User	Reference	Narrative	Control	Age	Comments	Update	Action
	8085468	2020-10-02	-1 587.99	Gugu Nkomonye	60R/RAAB1546	60sisaab0675 04	DN003794	489		<input type="radio"/>	Query
	8085465	2020-11-18	-100.00	Gugu Nkomonye	60R/RAAB1972	Svl-warranty Solutions Pty Ltd	RO004376	442		<input type="radio"/>	Query

**Create Mail**

Invoice Narrative:

Reference:

User:

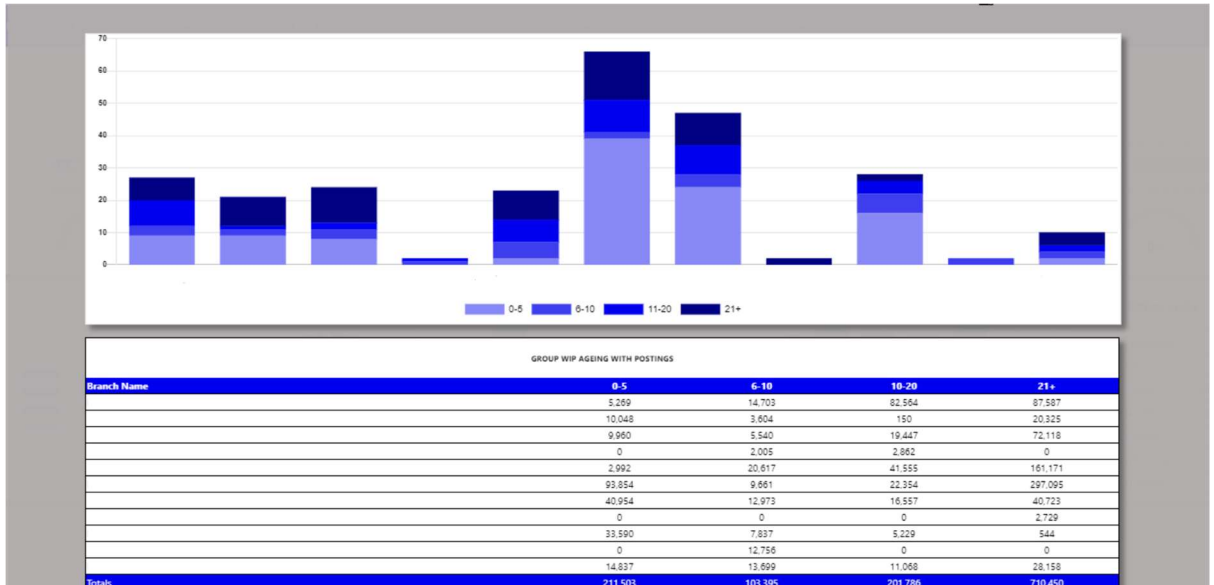
Comments:

Amount:

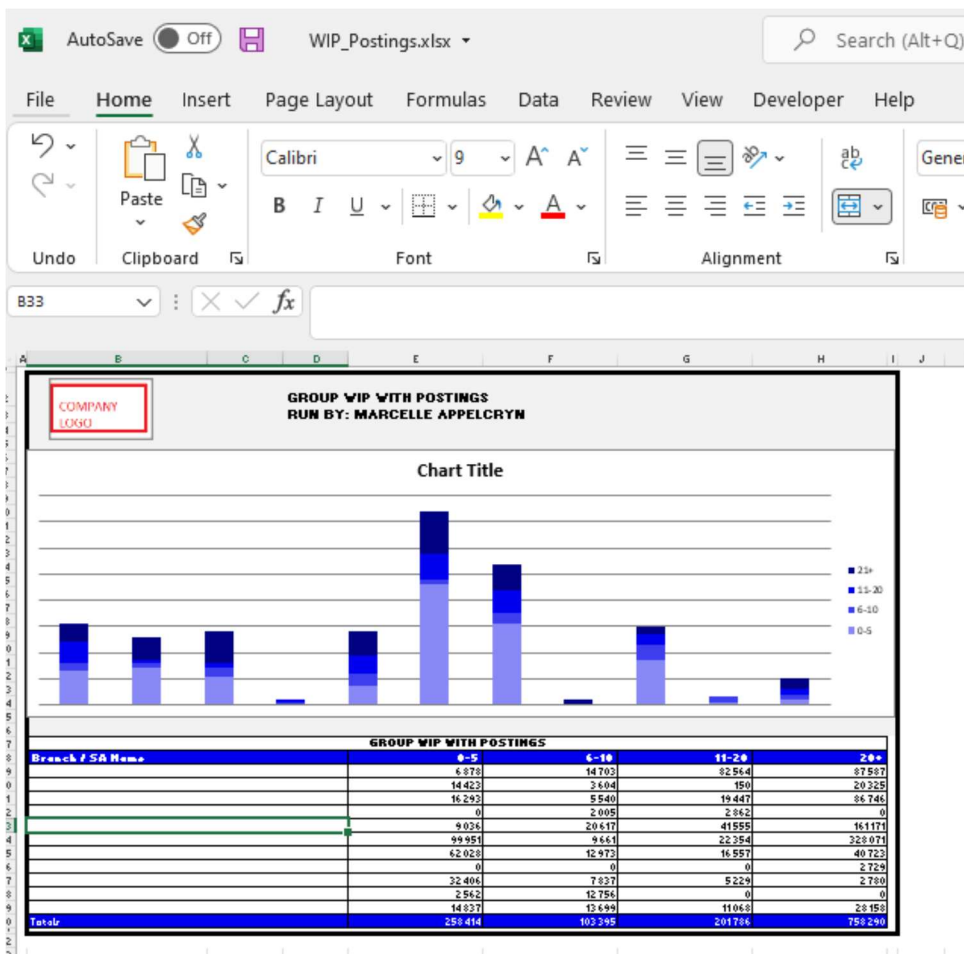
Complete By:

- b) WIP With Postings – this calculates the total Repair Orders where postings has been completed to the Repair Orders.

The Info icon will then display a graph ageing of each branch / Service Advisor depending on the user set up.



You can then export this to an excel document with graph and the line items.



You can click on an ageing bracket, and it will drill down to Repair Orders that is still in WIP Status and see comments. With an option to query this Repair Order from the BI tool.

WIP BETWEEN 21 AND 9999

Branch Name	Company	Service ID	Workshop	Customer	Date Created	Days Open	Service Advisor	Parts Sales	Labour Sales	WIP Created	Comments	Update Action
	4000-01	CR000538-1		William Dibetso	2019-02-09	1091	Hermanus Du Plessis	95,166.43	0.00	4000-01	31/1/22-VOP-KEY TO BE PROGRAMMED AND PARTS TO	Query
	4000-04	40000000-1		Volunteer Garage	2021-10-04	120	Rudolf Nel	95,996.47	0.00	4000-04	31-01-22 WOP CLUTCH ACTUATOR ON 2/0 1/0	Query

**Create Mail**

Service Advisor:  
Hermanus Du Plessis

Repair Order:  
CR000538-1

Customer:  
William Dibetso

Days Open:  
1091

Parts Sales:  
95,166.43

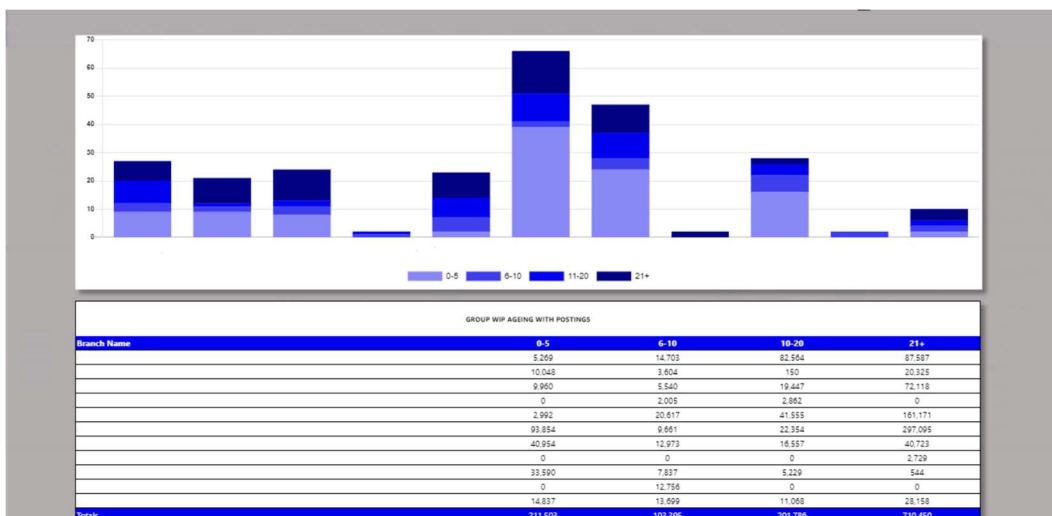
Labour Sales:  
0.00

Comments:  
31/1/22-VOP-KEY TO BE PROGRAMMED AND PARTS TO BE FITTED

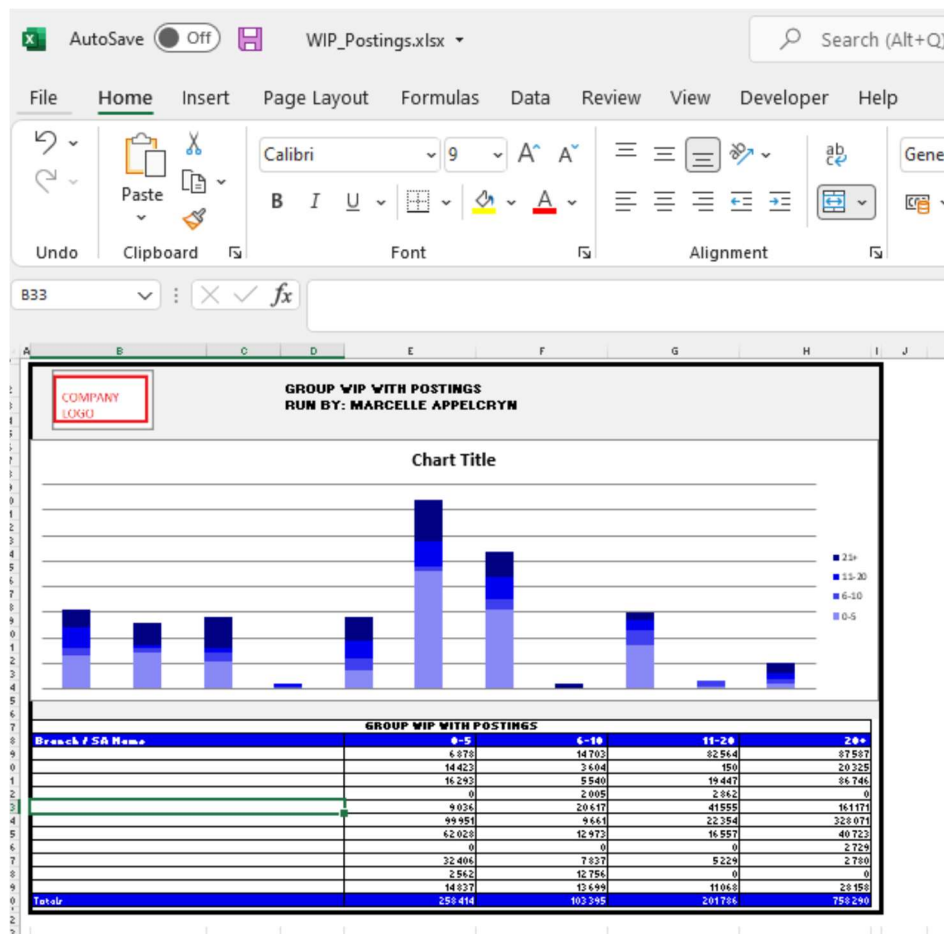
Complete By:  
2022/02/01

c) WIP No with Postings – this calculates the total Repair Orders where postings has been completed to the Repair Orders.

The Info icon will then display a graph ageing of each branch / Service Advisor depending on the user set up.



You can then export this to an excel document with graph and the line items.



You can click on an aging bracket, and it will drill down to Repair Orders that is still in WIP Status and see comments. With an option to query this Repair Order from the BI tool.

WIP BETWEEN 21 AND 9999

Branch Station	Company	Service ID	Branch	Customer	Date Created	Days Open	Service Advisor	Parts Labor	Labour Value	Shop Forecast	Comments	Update Action
	4020-11	CR000000-1		William Debas	2019-02-01	1591	Hermanus De Pass	85,186.40	0.00	4020	31/1/22 WIP KEY TO BE PROGRAMMED AND PARTS TO	More
	4020-04	48210000-1		Tobias van Lange	2021-10-04	120	Ruud van	65,966.00	0.00	4020	31-05-22 WIP CLUTCH ACTUATOR ON S/D PE	More

**Create Mail** ✖

Service Advisor:  
Hermanus Du Plessis

Repair Order:  
CR000538-1

Customer:  
William Dibetso

Days Open:  
1091

Parts Sales:  
95,166.43

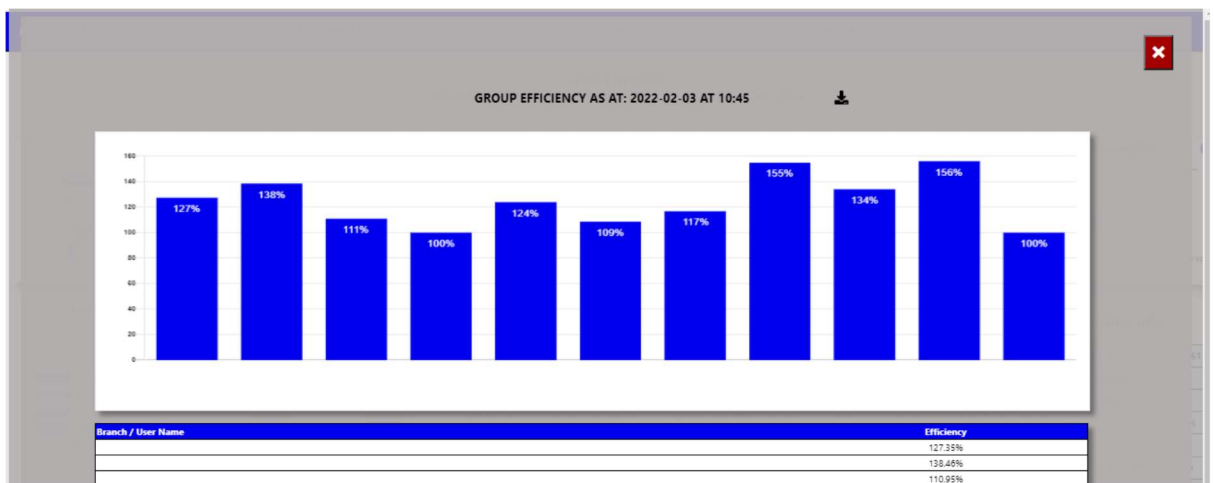
Labour Sales:  
0.00

Comments:  
31/1/22-VOP-KEY TO BE PROGRAMMED AND PARTS TO BE FITTED

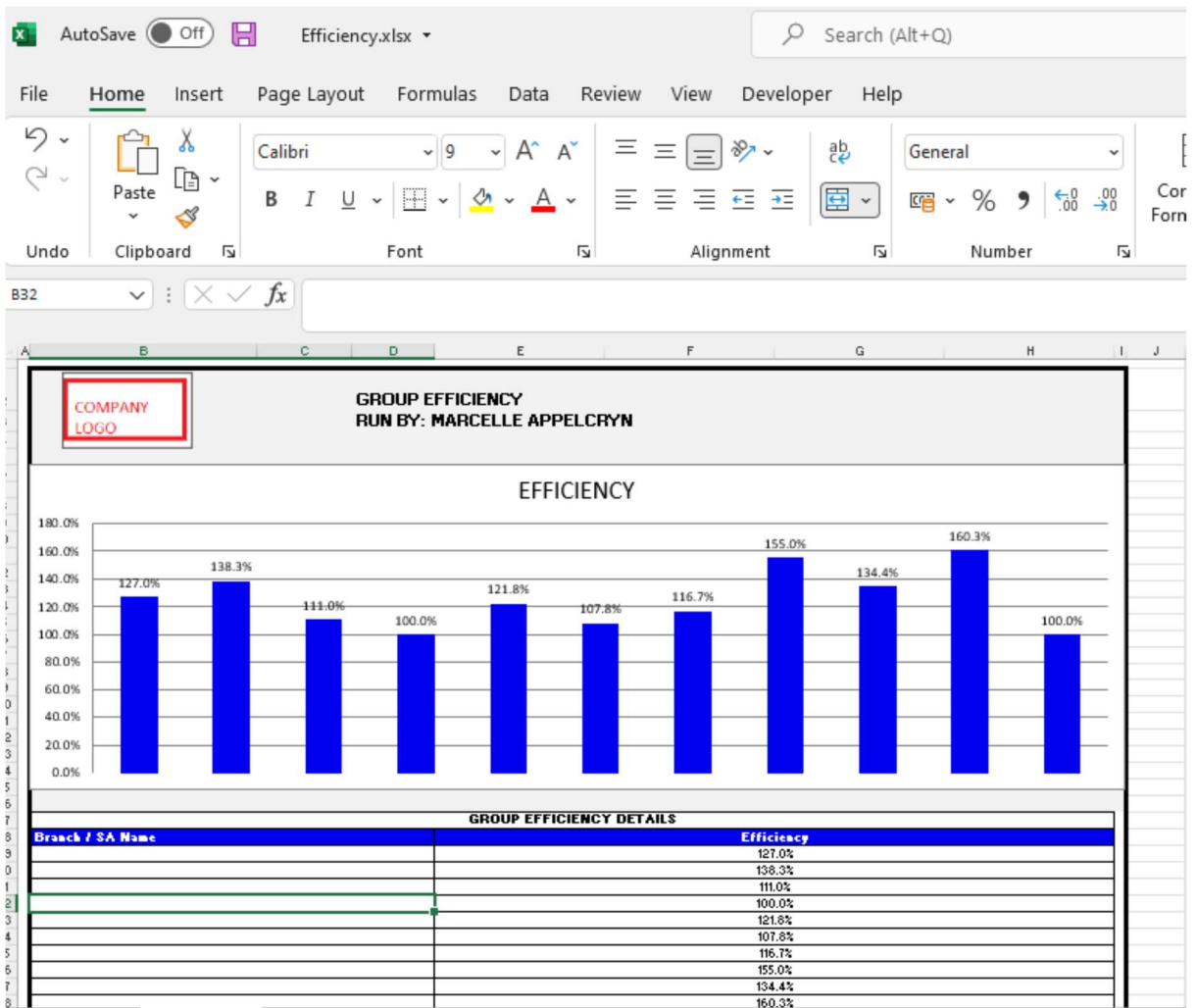
Complete By:  
2022/02/01 📅

d) Efficiency – this calculates the hours efficiency for group or dealer.

The Info icon will then display a graph efficiency of each branch / Technician depending on the user set up.



You can then export this to an excel document with graph and the line items.



- e) Labour Rate – this calculates the average labour rate per repair order.
- f) Hours per repair order – this calculates the average hours sold per repair order.
- g) Hours Sold (current date) – this displays the hours sold for the computer date.