

We know where good reporting can take your business.

We're going to help get you there.

### Daily

#### **Parts Allocation Report:**

Review the value of parts that are allocated to open repair orders. This dollar figure will need to be added back into your physical inventory valuation if you are reconciling physical inventory to the General Ledger.

#### **Non-Billed Labor Analysis\GL Journal Entry for Non-Billable Labor:**

Any time a tech is pulled away from turning a wrench is time you are losing the ability to bill a customer. Monitor non-billable labor and how the time is being spent to improve technician productivity and efficiency.

#### **Voided Repair Order Invoices:**

Review voided repair order invoices for audit logging, accountability, and managing discrepancies.

#### **Time Entry Search:**

Review technician open time for accuracy.

#### **Technician Time Search:**

Review technician time to ensure correct hours for the day. Also review when technician(s) have punched out for the day.

#### **Technician Daily Productivity Summary:**

Review technician productivity to measure efficiencies and benchmarks.

#### **Technician Time Report/Bar Code Time Log:**

Review technician time for accuracy.

#### **Repair Order Summary:**

Analyze invoiced orders to determine repair trends and profitability by branch, repair type, and technicians.

#### **Detail Transferred from Repair Order:**

Track and monitor parts, labor, accountability, managing discrepancies, and misc. charges moved from one repair order to another for audit logging.

#### **Customer Backorders Filled:**

Review parts that have been filled to repair orders to ensure installation is completed in a timely manner.

#### **Customer Backorder Filling:**

Review parts with customer backorder quantities greater than zero, as well as the details of the backorders that make up the quantity.

#### **Backorder Pick List:**

Review outstanding backorders for repairs to improve repair stages and proactively communicate with customers about estimated delivery.

#### **Repair Order Deletions:**

Review repair order deletions for audit logging, accountability, and managing discrepancies.

### Weekly

#### **Technician Performance Report:**

Analyze technician performance to determine if you are on track with maximizing your potential billable hours.

#### **Technician Time Report:**

Review technician time report for accuracy to reduce errors for payroll.

#### **Technician Monthly Productivity Summary:**

Review technician productivity to measure efficiencies and benchmarks.

#### **Repair Shop Sales by Repair Group/Repair Type:**

Analyze repair type performance and benchmarks by Branch, Group, Parts, Labor, Misc, Customer Pay/Internal/Warranty to improve job costing and help you complete accurate repairs on time.

#### **Revenue Lost from Non-Billed Time:**

Monitor applied labor revenue to improve technician productivity and increase revenue.

#### **Technician Efficiency Detail:**

Measure, track, and review technician efficiency to improve performance and allow you to service more trucks in less time.

#### **Open Repair Order Listing:**

Review open repair orders to prevent Turbo Close and minimize audit issues and missing revenue.

#### **Credit Limit Excess - Customers Exceeding Credit Limit:**

Review customer repairs in the service shop with credit limit issues to improve the invoicing process.

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## Monthly

### **Comeback Analysis:**

Review and manage comebacks for each technician to identify training opportunities and maximize production.

### **Technician Accrued Wage Report:**

Analyze compensation levels and benefits to assist with performance reviews.

### **Repair Order Analysis:**

Analyze repair shop work mix, effective labor rates, and shop efficiencies indicators to see how you stack up to your competitors.

### **Service Work In Process:**

Review the value of parts that are allocated to open repair orders. Identify orders that require attention to minimize write-offs, assist with customer follow up accountability, to effectively manage a profitable service department.

### **Technician Efficiency by Repair Group:**

Review monthly/semiannually to determine technician strengths and weakness with specific repair types/jobs.

### **Preventive Maintenance Due for Service Listing:**

Review Preventive Maintenance Due for shop scheduling.

## 2019 Yearly

### **Repair Type Maintenance:**

Review and update velocity pricing codes.

### **Miscellaneous Purchase Order Reconciliation:**

Identify any outstanding MPOs that have not been posted thru Accounts Payable OR where posted thru Accounts Payable in error. This report is also used as part of the month end inventory reconciliation process.

### **Labor Rates:**

Audit current labor rates for accuracy i.e. Customer, Internal, Warranty, and Customer Special rates.

### **Repair Order Summary:**

Review a list of open repair orders to prevent Turbo Close at the end of the year and minimize audit issues and missing revenue.