

## CAR-Research Service Drive Control Manager



WINXRM is a  
program Listed  
under  
CAR-Research

Select XRM Icon  
Login Name  
Password  
Dealer Id.



Version: 1.0.0.89

**Questions or Problems ???**  
**Call Support at 800-847-5649 or Email at [support@car-research.com](mailto:support@car-research.com)**

# Service Drive Control Manager – Accessing the Route Sheet

Click on “Service Control Manager”

The screenshot shows the Spring Chrysler Dodge Jeep Ram Service Drive Control Manager dashboard. The dashboard includes a top navigation bar with tabs for 'Dashboard', 'Appt Recon Service', and 'Service Drive Control Manager'. Below the navigation bar, there are several widgets:

- Quick Start Enhanced:** A large blue widget containing several action items:
  - Clock In / Out:** Click here to Clock In and Out for the day or for lunch.
  - Get Trained:** Click here to register for an online training class.
  - Service Drive Control Manager:** Dynamic Route Sheet displaying open ROs. (This widget is circled in red in the image, and a red arrow points from the text box above to it.)
  - Log a Phone Call:** Click here to log a new incoming or outgoing phone call.
  - My Follow Up:** Click here to complete outstanding follow up.
  - Find a Customer:** Click here to search for an existing customer.
  - Vehicle Search:** Click here to search for a vehicle.
  - Check My E-Mail:** Click here to go to your e-mail inbox.
  - Print Letters:** Click here to print your unprinted letters.
  - Appt Recon Service:** Click here to view and confirm appointments.
- 8:56:47 AM:** A clock widget showing the current time.
- Communications for 8/1/...:** A bar chart showing the number of incoming and outgoing calls and emails. The data is as follows:

Category	Value
IC Calls	0
OB Calls	51
IC Email	118
OB Email	0

At the bottom left of the dashboard, the version and dealership ID are displayed: Version: 2.0.0.67 DealershipID: 210.

# Car-Research Inspection Process – Accessing the Route Sheet

The screenshot shows a software dashboard with a 'Main Menu' on the left. A red box labeled 'Go to Main Menu' points to the menu. The menu items include GM Reports, Interviews, Maintenance, Marketing Center, Reports, Service Drive Control Manager, Estimate Unlock, Resubmit Schedule to DMS, Schedules Calendar, SDCM - Closed ROs, Service Appointment Calendar, Service Appointment Reconciliation, Service Control Manager, Service Control Manager - Beta, Service Reports, Setup, Shop Load Goals, Special Order Parts Entry, and Special Order Parts List. A red box labeled 'Next Click on "Service Drive Control Manager"' points to the 'Service Drive Control Manager' item. Another red box labeled 'Click on "Service Drive Control Manager"' points to the 'Service Control Manager - Beta' item. The dashboard also features a 'New Emails' section, a 'Digital Clock' showing 12:06:28 AM, and a status bar at the bottom with information like 'Version: 2.0.0.111' and 'DealershipID: 719'.

Go to Main Menu

Next Click on  
"Service Drive Control Manager"

Click on  
"Service Drive Control Manager"

Version: 2.0.0.111 DealershipID: 719

My Open Follow-Ups 2 My New E-Mails 2 Estimates Ready 1 Missed Contacts 22 Missed P/T 21

# Service Drive Control Manager Overview

The Service Drive Control Manager is your Electronic Route Sheet  
Used to manage your Repair Orders and Customer Contacts.

There are 3 Distinctive Sections designed to give you instant statistics to better manage your workload

Section 1 – Statistics with Drilldown Ability

Section 2 – Filters

Dashboard | Setup - General | Service Control Manager - Beta

Total ROs: 46 Today: 20 Waiting: 4 Missed PT: 41 No Email: 23 1-Liners: 21 Premium Services: 2.17% Missed Contacts: 42 Appts Set: 0.00% Rental: 0

Fleet: 0 No Insp / Call / TO: 7 / 2 / 0 Fin / No Call: 3 / 3 Working: 42 On Hold: 0 Vehicle Gone: 6 New Customers: 10 Inactive: 3 Hot Alert: 0

Reset | Pause | Show Pre-Owned | Hide Internal | Hide Retail | Show All RO's-OFF | Financials | Search | Reports

Time In	Promise Time	Customer	D	R	Service Advisor	RO#/Tag	Mileage	MPI	C / W / I / W	OP Codes	Vehicle	DM	Cont	Value	P
2:9 4:00	02/09 17:30	Eli Schwartz 155			Tony Salamone	213974 929	57382	0/1 TU 5.4R	2 / 0 / 0	FINISHED (02/09/2012) QC/MULTI-POINT CHE	SILVERADO K2500HD 21857	20	0 / 0 / 0	Parts: 78.58 Labor: 79.97 Total: 158.52	
2:9 4:04	02/09 17:30	Catholic Health East			Tony Salamone	213973 928	120504	Y	0 / 0 / 0	WORKING QC/MULTI-POINT	MONTE CARLO LS 47823		0 / 0 / 0	Parts: 0.00 Labor: 0.00 Total: 0.00	
2:9 11:41	02/09 17:30	KINGMAN CUSTOM STAIRS & TRIM L 471			Jeff Bales	213969 024	102112	Y	4 / 0 / 0	WORKING LUBE, OIL AND FILT	EXPRESS G1500 11020		0 / 0 / 0	Parts: 10.35 Labor: 11.30 Total: 20.65	
2:9 11:13	02/09 17:30	Fernando Valdes			Tony Salamone	213968 W825	37495	Y	2 / 0 / 0	FINISHED (02/09/2012) QC/MULTI-	IMPALA LTZ 79085		0 / 0 / 0	Parts: 47.64 Labor: 147.00 Total: 194.64	
2:9 11:04	02/09 17:30 02/10 17:00	Leopold Guillaume			Jeff Bales	213966 022	3804	Y	1 / 1 / 0	WORKING (432 Floyd Cox) ENGINE MECHANICAL/QC/	CRUZE ECO 12013		0 / 0 / 1	Parts: 0.00 Labor: 0.00 Total: 0.00	
2:9 9:09	02/09 17:30	Saa Faa 305			Tony Salamone	213965 920	30993	Y	3 / 0 / 0	FINISHED (02/09/2012) QC/MULTI-POSTEE	TRAILBLAZER LS/LT 29189		0 / 0 / 1	Parts: 135.34 Labor: 129.96 Total: 265.29	
2:8 4:04	02/08 17:30 02/13 17:00	PB CO SHERIFFS OFFICE I			Jeff Bales	213954 018	28716	Y	1 / 1 / 0	WORKING (801 EXHAUST NOISE	IMPALA POLICE 34328		0 / 0 / 1	Parts: 0.00 Labor: 0.00 Total: 0.00	
2:8 3:10	02/08 17:30	Roger Dean Chevrolet Inc. 8			Jeff Bales	213953 R017	28009	Y	1 / 0 / 2	WORKING (795 Robert Jones) FULL SAFETY/INSPOCM	SILVERADO C1500 69881		0 / 0 / 0	Parts: 65.00 Labor: 0.00 Total: 65.00	
2:8 3:08	02/08 17:30	Roger Dean Chevrolet Inc. 21			Jeff Bales	213952 018	28633	0/2 2U 5.1R	1 / 0 / 2	WORKING (795 Robert Jones) FULL SAFETY/INSPOCM	COMMANDER LIMITED 47433	20	0 / 0 / 0	Parts: 65.00 Labor: 0.00 Total: 65.00	

Version: 2.0.0.111 DealershipID: 719

My Open Follow-Ups: 0 All Unworked Leads: 0 All New E-Mails: 25

Section 3 – Repair Order Information

# Service Drive Control Manager - Drilldown Statistics

## View Repair Orders by Categories

Dashboard - Service Control Manager - Beta

Total RO's: 90 Today: 10 Waiting: 5 Missed PT: 30 No Email: 21 1-Liners: 21 Premium Services: 2.00% Missed Contacts: 32 Appts Set: 0.00% Rental: 0

Fleet: 0 No Insp / Call / TO: 7 / 2 / 0 Fin / No Call: 0 / 0 Working: 50 On Hold: 0 Vehicle Gone: 0 New Customers: 9 Inactive: 4 Hot Alert: 0

Reset Pause Show Pre-Owned Hide Internal Hide Retail Show All RO's-OFF Financials Search Reports

Time In	Promise Time	Customer	Vehicle	DM	Cont	Value	P
2:10 9:04	02:10	Diana Pekkakatze	AVALANCHE C1500		0 / 0 / 0	Parts: 0.00 Labor: 0.00 Total: 0.00	
2:10 8:57						Parts: 0.00 Labor: 0.00 Total: 0.00	
2:10 8:51						Parts: 21.25 Labor: 0.00 Total: 21.25	

Item in Red is Category you are currently viewing

Drilldown on any Category to view only RO's that match Criteria.  
NOTE - All the Statistics Reflected are based off of Selected Category

- Total RO's = Total number of RO's – Only reflects OPEN repair orders.
- Today = Total Number of RO's written today – INCLUDES Closed Repair Orders opened that day.
- Waiting = Number of waiter customers.
- Missed PT = Number of RO's that have exceeded the current promise time.
- No Email = Number of RO's Customers that do not have an email address.
- 1-Liners = Number of RO's that have less than 2 customer pay lines.
- Premium Services = Percentage of Vehicles with Premium Items sold vs. Unique Vehicles
- Missed Contacts = Number of RO's that have passed the time we promised customer a contact.
- Appts Set = Percentage of RO's that came from an scheduled appointment.
- Rental = Number of RO's that have a Rental op-code on the ticket.
- Fleet = Fleet Vehicles (Chrysler Only)
- No Insp/Call/TO = RO's without Inspections/Inspections with No Calls to customer/ Inspections with no TO Calls
- Fin/No Call = RO's Finished/Completed Vehicle Calls pending
- Working = Number of RO's in working status
- On Hold = Number of RO's in On Hold status
- Vehicles Gone = Vehicles put into Gone status
- New Customers = Number of Customers showing their 1<sup>st</sup> visit
- Inactive = Number of Customers that have are Inactive based on dealer defined days since last visit
- Hot Alert = RO's that have a Hot Alert - Require action.

# Service Drive Control Manager - Filters

Filters in or out Groups of RO's

The screenshot shows the Service Drive Control Manager interface. At the top, there are several status bars: 'Total RO's' (Today: 20, Waiting: 4, Mixed PT: 41, No Email: 23, 1 Oners: 23, Premium Services: 2.17%, Mixed Contacts: 42, Apply Set: 0.00%, Rentals: 0), 'Fleet' (No Insp / Call / PO: 7 / 2 / 0, Fin / No Call: 1 / 1, Working: 42, On Hold: 0, Vehicle Gone: 0, New Customers: 10, Inactive: 1, Hot Alerts: 0), and a toolbar with buttons for 'Reset', 'Pause', 'Show Pre-Owned', 'Hide Internal', 'Hide Retail', 'Show All RO's Off', 'Financials', 'Search', and 'Reports'. Below the toolbar is a table with columns: Time In, Promise Time, Customer, D, R, Service Advisor, RO#/Tag, Mileage, MPI, C / R / I, W, OP Codes, Vehicle, DB, Cost, Value, P, and icons. The table contains four rows of data, each with a red background for the 'Promise Time' and 'Cost' columns.

Time In	Promise Time	Customer	D	R	Service Advisor	RO#/Tag	Mileage	MPI	C / R / I	W	OP Codes	Vehicle	DB	Cost	Value	P	Icons
11:28	11:30	El. Servis			Tony Salomero	21874 528	8782	1.0	2 / 0 / 0		FINISHED (REWORK) GC/MULTI-POINT ONE	SILVERADO 4300HD 21857		112.11	Parts: 70.00 Labor: 70.00 Total: 140.00		
11:28	11:30	Cedric Heath Ltd			Tony Salomero	21873 528	12854	1.0	0 / 0 / 0		WORKING GC/MULTI-POINT	MONTE CARLO LS 4703		112.11	Parts: 0.00 Labor: 0.00 Total: 0.00		
11:41	11:42	CHOMALQUEON CARRELS DORA			Jeff Bates	21888 524	10710	1.0	4 / 0 / 0		WORKING LUBE, OIL AND FLT	EXPRESS 0140 1100		112.11	Parts: 10.00 Labor: 11.00 Total: 20.00		
11:13	11:30	Excess/Lab			Tony Salomero	21888 520	3748	1.0	2 / 0 / 0	Y	FINISHED (REWORK) GC/MULTI	IMPALA LTZ 1900		112.11	Parts: 47.00 Labor: 147.00 Total: 194.00		

Reset = Resets/Refreshes screen to show ALL RO's

**NOTE – To Refresh Screen for only the selected view you are using Click on Total RO.s**

Pause = Prevents screen from refreshing – Used only when you need to make updates to Multiple RO's

Show Pre-Owned = Pre Owned Vehicles currently in Shop (based off of Used Vehicle Inspection Op-Code

Hide Internal = Hides Internal RO's - Good for Used Car Managers to track their vehicles.

Hide Retail = Hides all Retail RO's

Show All RO's Off = Selection not Active at This Time.

Financials = Shows the selected groups of RO's Total Parts and Labor charged to ticket currently.

Search = Search RO's by Customer Last Name, Tag, RO#, Technician Assigned to RO, Advisor or Inspection Status.

Reports = Management Reports

# Service Drive Control Manager - Financials

Up To Minute Parts and Labor Dollars for any Selected Group of RO's

The screenshot displays the 'Financials' section of the Service Drive Control Manager. At the top, there are several status bars showing metrics like Total ROs, Today's appointments, and Fleet status. Below these is a navigation bar with icons for 'Reset', 'Pause', 'Show Pre-Owned', 'Hide Internal', 'Hide Retail', 'Show All RO's-OFF', 'Financials', 'Search', and 'Reports'. The 'Financials' menu item is circled in red. Below the navigation bar, there's a summary section with 'Shop Goal: 0.00', 'Load: 305.97', 'Avail: 0.00', and 'Next Day Appointments: 1 Hours: 0.00'. The main part of the screen is a table with two main sections: 'Open ROs' and 'Closed ROs'. Each section has a 'Totals ROs' and a 'Customer Pay Totals' sub-section. In the 'Closed ROs' 'Customer Pay Totals' sub-section, the '# of DMs' field is highlighted with a red box, and a callout box points to it with the text 'Number of Declined Maintenances'. Below the summary tables is a detailed table with columns for Time In, Promise Time, Customer, D, R, Service Advisor, ROR Tag, Mileage, MPI, C/W/I, W, OP Codes, Vehicle, DM, Cont, Value, and P. The first row shows a customer 'Roger Dean Chevrolet Inc.' with a value of 0.00.

Shop Goal/Load/Avail = For Dealers using Service Scheduler – Dealer Hrs Goal/Hours Booked on open RO's and Appointments/ Hours Available for Day

Next Day Appointments/Hours = Number of Appointments scheduled for next day and estimated hours to complete

Open RO's = Financials for Selected Open RO's

Closed RO's = Financials for Selected Closed RO's

# Car-Research Inspection Process – Search Function

Search RO's by RO Number, Customer Last Name, Tag Number  
Technician Assigned to ticket Advisor or Inspection Status

The screenshot displays the CAR-Research WINXRM Admin interface. At the top, the window title is "CAR-Research WINXRM Admin Admin" and the user is logged in as "Roger Dean Chevrolet". The interface includes a navigation bar with buttons for "Reset", "Pause", "Show Pre-Owned", "Hide Internal", "Hide Retail", "Show All RO's-OFF", "Financials", "Search", and "Reports".

Search filters are highlighted with red boxes and labels:

- Search**: A red box highlights the "Search" button in the navigation bar.
- Search by Customer Last Name RO or Tag Number**: A red box highlights the "Search Options" section, which includes radio buttons for "N/A", "Customer Last Name", "RO#", and "Tag#", along with a "Search" button.
- Search by Advisor**: A red box highlights the "Filter by Service Advisor" section, which includes a dropdown menu for "Service Advisor" (currently set to "All Advisors") and a "Search" button.
- Search by Tech Assigned to Job**: A red box highlights the "Technician Login" section, which includes a dropdown menu and a "Login" button.
- Search By Inspection Status**: A red box highlights the "Filter by Inspection Status" section, which includes checkboxes for "In Process", "To Parts", "To Advisor", "Pull Parts", and "To Technician", along with a "Search" button.

The main data table is as follows:

Time In	Promise Time	Customer	D	R	Service Advisor	RO#/Tag	Mileage	MPI	C / W / I	W	OP Codes	Vehicle	DM	Cont	Value	P
2/8 4:04	02/08 17:30	PB CO SHERIFFS OFFICE			Jeff Bailes	213954 016	28716	Y	1 / 1 /		WORKING EXHAUST NOISE EXHAUST	IMPALA POLICE 34328		0 / 0 / 0	Parts: 0.00 Labor: 0.00 Total: 0.00	
2/8 3:10	02/08 17:30				Jeff Bailes							SILVERADO C1500 65681	0/0	0 / 0 / 0	Parts: 65.00 Labor: 0.00 Total: 65.00	
2/8 3:08	02/08 17:30	20			Jeff Bailes	213952 016	28833	0/0	1 / 0 / 2		WORKING FULL SAFETY/INSPQC/M	COMMANDER LIMITED 22473		0 / 0 / 0	Parts: 65.00 Labor: 0.00 Total: 65.00	
2/8 3:05	02/08 17:30	Roger Dean Chevrolet Inc.			Jeff Bailes	213951 015	17704	Y	1 / 0 / 3		WORKING FULL SAFETY/INSPMQC/	CAMARO LS 04535		0 / 0 / 0	Parts: 65.00 Labor: 0.00 Total: 65.00	

At the bottom of the interface, the version is "2.0.0.111" and the dealership ID is "719". The taskbar shows several open applications, including "Final Versions", "My Yahoo! - Wi...", "Inbox - Micros...", "CAR-Research ...", "Sprint SmartView", and "Microsoft Power...". The system clock shows "9:16 PM 2/8/2012".

# Service Drive Control Manager - Repair Order Information

## Repair Order Information with Drilldown Ability

Time In	Promise Time	Customer	D	R	Service Advisor	RO#/Tag	Mileage	MPI	C / W / I	W	OP Codes	Vehicle	DM	Cont	Value	P	
02/11 10:25	02/11 15:00	Gloria Veashten 32				214017					EMERGENCY (8744/2042)	AVED LT		0 / 0 / 0	Parts: 214.75 Labor: 0.00 Total: 214.75		
02/11 9:27	02/11 15:00	Fernita Patis 200				702					QC/MULTI-POINT CH	20922		0 / 0 / 1	Parts: 0.00 Labor: 0.00 Total: 0.00		
02/13 1:45	02/13 17:30	Jon Karvat 793			Tony Salamona	214002 942	80254	Y	5 / 0 / 0		WORKING (984 Luis Sarmiento) QC/MULTI-POINT CH	TRAILBLAZER 45224		0 / 0 / 0	Parts: 0.00 Labor: 0.00 Total: 0.00		

Click on any Column Header to Sort RO's by Column Value

Promise Time and Contact Box will Turn Yellow 15 Minutes Before Contact/Promise Time is Due and Red when Due



= Inspection Estimate Drilldown – See Inspection Process Guide for Details

Time In = Timestamp of when RO was opened in within the DMS

Promise Time = Promise Time set in DMS and the latest updated Promise Time entered. Also controls gone vehicles (see page 11 )

Customer = Customer Name and days since last visit – Will also display an “A” if RO was by appointment and/or a “D” if there were declined services on last visit. Drilldown for additional information (see page 12).

D = Decline Column - will denote if there were Declined Services on last visit.

R = Rental Column – will denote a “R” if a rental op-code is on RO.

Service Advisor = Advisor assigned to RO.

RO#/Tag = The RO and Tag number.

Mileage = Vehicles Current Mileage.

# Service Drive Control Manager - Repair Order Information (Continued)

## Repair Order Information with Drilldown Ability

	Time In	Promise Time	Customer	D	R	Service Advisor	RO#Tag	Mileage	MPI	C / W / I	W	OP Codes	Vehicle	DM	Cont	Value	P		
	<a href="#">2:11</a> <a href="#">10:25</a>	02/11 15:00 02/13 17:00	<a href="#">Gloria Veashten</a> <a href="#">32</a>			Tony Salamone	214017 749	21572	Y	1 / 1 / 0		FINISHED (82/11/2812) QC/MULTI-POINT	AVEO LT 96706		3 / 3 / 1	Parts: 214.75 Labor: 0.00 Total: 214.75			
	<a href="#">2:11</a> <a href="#">9:27</a>	02/11 15:00 02/13 17:00	<a href="#">Pamela Park</a> <a href="#">200</a>			Tony Salamone	214013 702	174904	Y	3 / 0 / 0		WORKING (827 John Vail) QC/MULTI-POINT CH	C2000 SUBURBAN 20922		0 / 0 / 1	Parts: 0.00 Labor: 0.00 Total: 0.00			
	<a href="#">2:10</a> <a href="#">1:45</a>	02/13 17:30	<a href="#">Jon Karval</a> <a href="#">793</a>			Tony Salamone	214002 942	86254	Y	5 / 0 / 0		WORKING (984 Luis Sarmiento) QC/MULTI-POINT CH	TRAILBLAZER 45224		3 / 0 / 0	Parts: 0.00 Labor: 0.00 Total: 0.00			

MPI = Denotes a Inspection op-code is on the RO. See Inspection Process Guide for Detail.

C/W/I = Number of Customer Pay/Warranty/Internal lines on RO.

W = Waiter Column – will denote a “Y” in column.

Op Codes = A detail of the lines on the RO. Drilldown to see all lines. (see page 13)

Vehicle = Vehicle Model and last 6 or 8 of Vin. (according to DMS)

DM = Declined maintenances on current RO from either the inspection or from any decline op-codes flagged on RO.

Cont = Customer Contacts – Number of Incoming Calls/Outgoing calls/Notes made. Drilldown to update contact time, promise time, and to create Hot Alerts. ( see page 14)

Value = Parts, Labor, and Total dollars posted to RO currently.

P = Denotes the number of Premium Services on RO.

 = A Hot Alert has been created for this RO. Hot Alerts are a “Call to Action” for Advisor (see page 14)

 = Customer has an email on file. (see page 15)  = Customer has email address but has Opted Out from receiving further Emails.



# Service Drive Control Manager – Customer Information Drilldown

Click on Customer Name to open Customer History



Close window when Finished

Previous Inspection

Click "Show Filters" and Then dropdown box under Event selecting "Service" to View only Service Events.

Customer Record also Includes Customer Value by Sales and Service And also Service History

A screenshot of the 'Customer Information Drilldown' window. The window title is 'Customer (Gossard)'. The main content area is divided into several sections: 'Customer Information', 'Contact Information', and 'Additional Information'. Below these is a table of events. The 'Show Filters' button is circled in red, and a dropdown menu is open under the 'Event' column, with 'Service' selected. A red box highlights a row in the table with the date '04/15/2011' and the event type 'Service'. A red line connects the 'Previous Inspection' text to a small icon in the bottom right corner of the table.

Date	Event	Employee	Entered By	Dept	Vehicle	Next Ct	Notes
04/16/2011	Note	Paula Bean			2005 Liberty	04/16/2011	Service Follow Up 1 Days (Missed)
04/16/2011	Note	Steve Williams			Liberty	04/16/2011	SERVICE: HIGH MILEAGE (Missed) DO-163760
04/15/2011	Service	Gregory Coronado			2003 Liberty MI-38314		CASH DESCRIPTION- FUEL&OIL TREATMENT (BENEFITS FOR THIS SERVICE 3 MONTHS OF ROADSIDE ASST \$75 REINBURSTMENT FOR TOWING CELL CEL CEL
04/14/2011 11:56 AM	CTI	Phone System	AUTO				Incoming- (00:00:29) 3052557150 EXT. 220
04/14/2011 11:55 AM	CTI	Phone System	AUTO				Incoming- (00:00:19) 3052557150 EXT. 220
04/14/2011 11:55 AM	CTI	Phone System	AUTO				Incoming- (00:00:11) 3052557150 EXT. 220
03/25/2010 03:13 PM	Campaign	Steve Williams					End of March 1 week sales event- Working

# Service Drive Control Manager – Op-Code Drilldown

View Detail of all Lines on RO

Also can be used to Dispatch Work to Technicians

Dashboard | Setup - General | Service Control Manager - Beta

Total ROs: 46 Today: 20 Waiting: 4 Missed PT: 41 No Email: 23 1-Liners: 21 Premium Services: 2.17% Missed Contacts: 42 Appts Set: 0.00% Rental: 0

Fleet: 0 No Insp / Call / TO: 7 / 2 / 0 Fin / No Call: 3 / 3 Workings: 42 On Hold: 0 Vehicle Gone: 6 New Customers:

Reset | Pause | Show Pre-Owned | Hide Internal | Hide Retail | Show All RO's OFF | Financials

Time In	Promise Time	Customer	D	R	Service Advisor	RO#Tag	Mileage	MPI	C / W / I	W	OP Codes	Vehicle	DM	Cont	Value	P
2:9 4:00	02:08 17:30	El Schwartz 155			Tony Salamone	213974 929	57382	9.1 TU 8.25	2 / 0 / 0		FINISHED (02/09/2012) QC/MULTI-POINT CHE	SILVERADO K2500HD 21957	0.0	0 / 0 / 0	Parts: 78.55 Labor: 79.97 Total: 158.52	
2:9 4:04	02:09 17:30	Catholic Health East			Tony Salamone	213973	126504	Y	2 / 0 / 0		WORKING	MONTE CARLO LS	0.0	0 / 0 / 0	Parts: 0.00 Labor: 0.00	

Click on Op-Code to Open Window

Line Items RO#: 213974

Detail Info	Cause	Cause	Labor Type	Dispatch Code	Line Status	Parts Flag	Tech No 1	Tech No 2	Tech No 3
0 - QC/MULTI-POINT CHECK									
35CVZ(3) PERFORM GM MULTI-POINT VEHICLE INSPECTION AND PERFORM A QUALITY CONTROL INSPECTION		QUALITY CONTROL CHECK COMPLETED,SEE SERVICE CONSULTANT FOR MULTI-POINT INSPECTION RESULTS	C	F	F		John Vail		
1 - DIESEL FUEL FILTER									
05CVZ05(1.1) REPLACE DIESEL FUEL FILTER,INCLUDES REPRIMING AND BLEEDING FUEL SYSTEM	MAINTENANCE,	COMPLETED,					John Vail		

View/Assign Technician

Version: 2.0.0.111 DealershipID: 719 My Open Follow-Ups: 0 All Unworked Leads: 0 All New E-Mails: 25

# Service Drive Control Manager – Contact Box Drilldown

Used to Update Status, Promise Time, Contact Time, and Create Hot Alerts  
Notes and Calls also Save to Customer History



Save and Close

Click on Contact Box to Open Window

Red Bar appears asking for Email Address if none on File.  
Entering Email will Save to File and Update DMS



Date/Time	Contacted By	Call Results	Notes
02/08/2012 16:14:00	PHONE SYSTEM		
02/09/2012 14:21:00	PHONE SYSTEM		INCOMING- (22:24:10) 5617430415 EXT. 3200
02/09/2012 14:41:52	Jeff Bailes	Internal Note Revised Promised Date	parts hold rental

Notes and Call History

Input Notes  
And  
Update  
Next  
Contact Time

Choose Note Origination – You May Select Several

New Note

Contacted by: [Dropdown]

Next Contact Date/Time: [Input]

Call Results

- Busy
- Completed Vehicle Call
- Customer Called Us
- Internal Note
- Left Message
- Need More Information
- No Answer
- We Called Customer
- HOT ALERT

Covered Estimate

Covered With: [Dropdown]

Approved Amount: [Input]

Revised Estimate

Revised With: [Dropdown]

Revised Amount: [Input]

Revised Promised Date

Revised Date Time: [Input]

Update  
The  
Promise  
Time

Create a Hot Alert for Advisor  
Uncheck Hot Alert to Remove

Use For Estimate and Revised Estimate Approvals

# Service Drive Control Manager – Email Drilldown

Easily Send Emails to Customers

2.0	3.45	3098	17.30	Robert McNeil	50	Jack Shugart	213885	766	5	0 / 1 / 0	WORKING	CAMPAIGN/RECALL	EQUINOX LS	58768	0 / 1 / 0	Parts: 0.00	Labor: 0.00	Total: 0.00
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Send

Click on  To Open Email Window

The screenshot shows the email composition interface. The 'Send' button is circled in red. The 'Email Subject' field contains 'Roger Dean Chevrolet West Palm Beach'. The 'Next Contact' section has several checkboxes: 'No Next Contact', 'Date / Time', 'Reason', 'Mark My Open Contacts Complete', 'Mark All Other Open Contacts Complete', and 'Internet - Remove from Tasks'. The 'Vehicle' information includes 'EQUINOX LS (Chevrolet)', 'Stock Number: TL2029', and 'Department: CHEVROLET NEW'. The 'Template Folders' dropdown is set to 'General' and the 'Template' is 'CM Default Template-DO NOT MODIFY'. The email body starts with 'Dear [firstname]' and 'Best regards,'. The status bar at the bottom shows 'Words: 5 Characters: 40'.

Email Subject

Schedule a Follow Up Contact if Needed

Ability to Have pre-built Templates Contact Support to Add Templates

Automatically Fills in Customer Name and Your Contact Information.

Dear [firstname]

Just Type your Message and Send !