



PBS Business Intel

Hello again from the PBS Business Intel Team, last month we sent out our first copy of the Business Intel monthly newsletter to keep our users up to date on the new items added to their master libraries. If you happen to miss the previous newsletter or are a new BI user and would like a copy of any previous newsletters, please let the BI team know and we can forward you a copy.

As we mentioned in the previous newsletter the objective for these newsletters is to list any updates and changes made to the BI software, as well as mention any future projects that the BI team is working on so we can hear your input on what will be important for you.

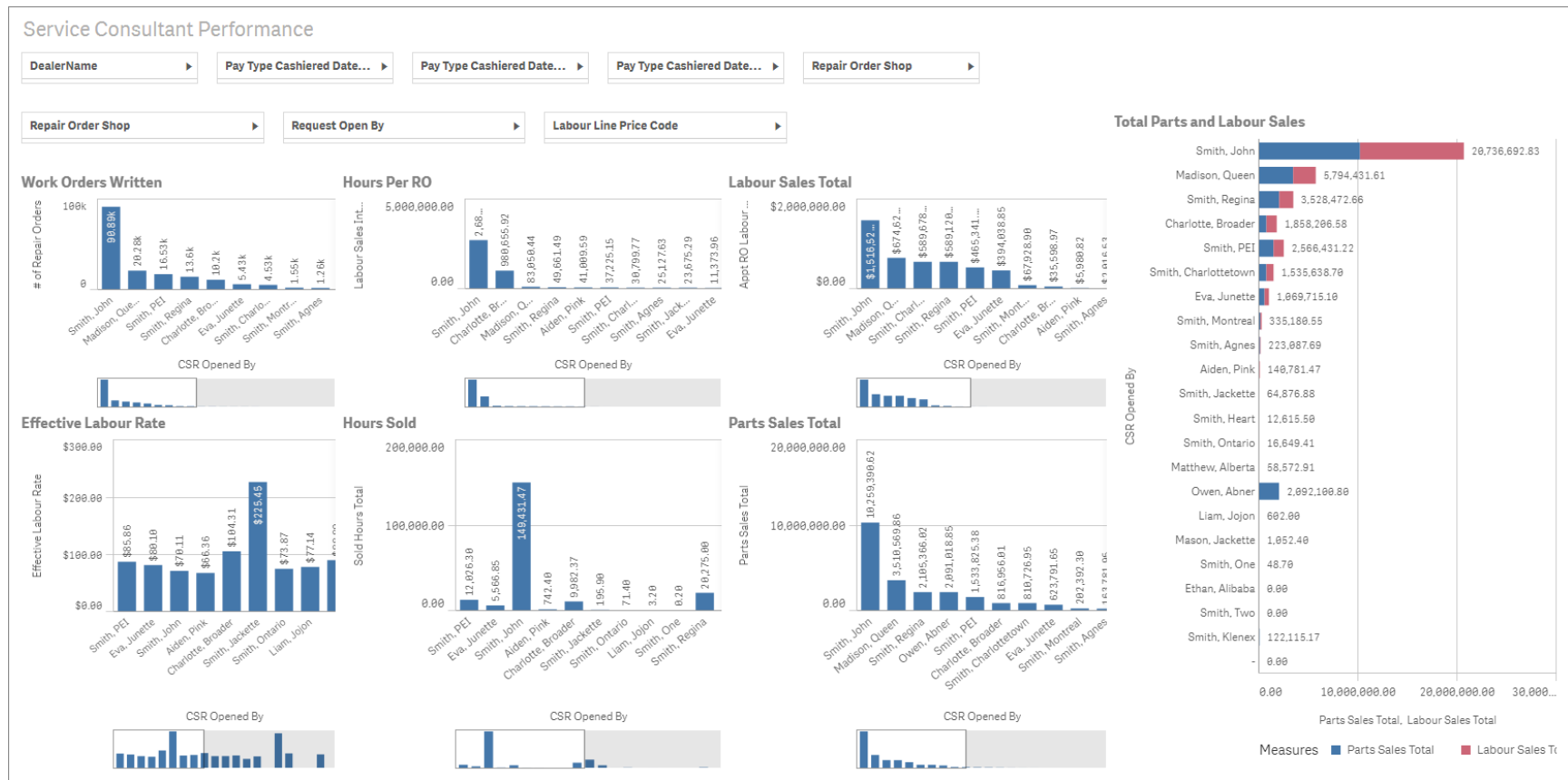
So without further ado we will start with the updates and changes that have occurred since our last newsletter.

Updates and Changes:

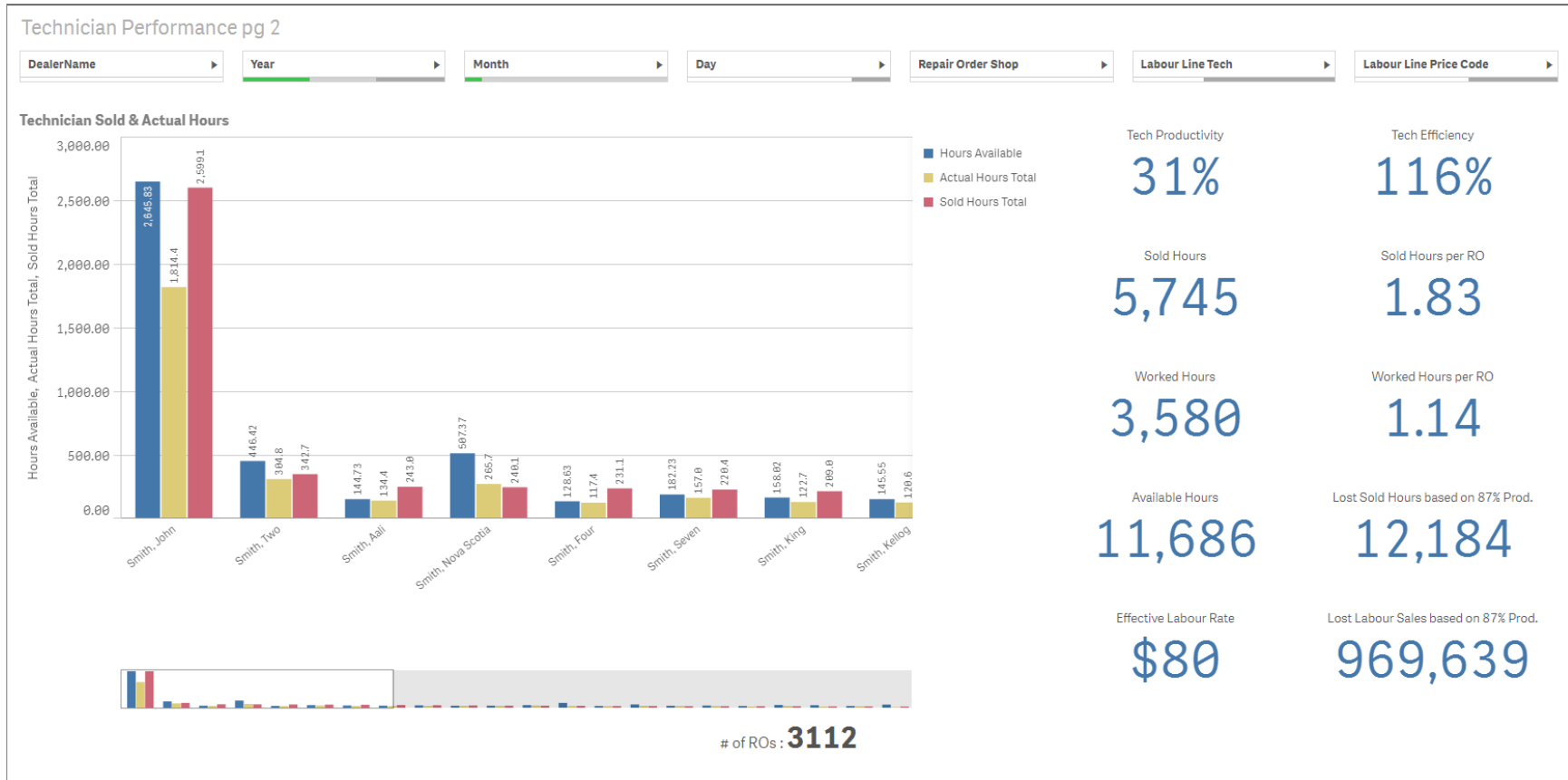
Below is an update on some changes you may have noticed within Business Intel:

- **Created Service consultant performance sheet in service application.**
- **Added technician performance 2 sheet to service application.**
- **Added shop booking efficiency sheet to service application.**
- **Added tech payroll data into the service application data model (requires connection to evolution database).**
- **Added RO age as a field in RO table vs as calculated measure.**
- **Added pivot table showing total clocked hours by day by technician.**
- **Added pivot table showing technician actual hours and booked hours.**
- **Added parts and repair order data to the accounting data model to link posting in the general ledger to the repair order.**
- **Added visualization for deal gross profit using GL postings to accounting application.**
- **Added Time Clock application (connection to evolution database is required).**
- **Added visualizations, measures, dimensions to master library in timeclock applications.**
- **Created sheets showing dispatch, tech payroll and aristo timeclock details and overview to timeclock application.**

Service Consultant Performance Sheet- This sheet contains multiple bar charts showing performance measures such as: work orders written, hours per RO, total labour sales, ELR, sold hours, total parts sales and parts to labour sales comparison. Each of these performance measures is detailed by service advisor.



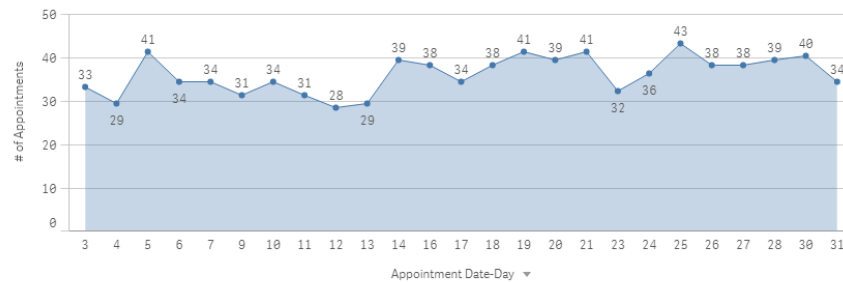
Technician Performance pg2 –This sheet expands on the existing technician performance sheet and includes data from the dispatch module. Some of the features include a bar chart showing hours available, actual hours and sold hours by technician. As well the sheet contains some KPIs showing productivity, efficiency, hours worked per RO, lost sold hours based on 87% productivity and lost labour sales based on 87% productivity.



Shop Booking Efficiency Sheet- This sheet provides details from repair orders and appointments. Line charts along the left show the number of ROs and number of appointments by the day of the month. KPIs on the top right show information about the shops booking efficiency. Some of the measures include: Appointment Hours Sold per Day, Hours Worked Per RO, Hours Available to sell Per Day and Additional Appts to Book Per Day.

Shop Booking Efficiency

Number of Appointments Per Day



of Repair Orders

597

of Appointments Shown

639

Walk In and Other RO's

-42

Worked Hours Sold Per Day

24

Appointment Hours Sold Per Day

26

Walk In & Other Hours Per Day

-2

Hour Worked Per RO

0.9

Hours Available to Sell Per Day

40

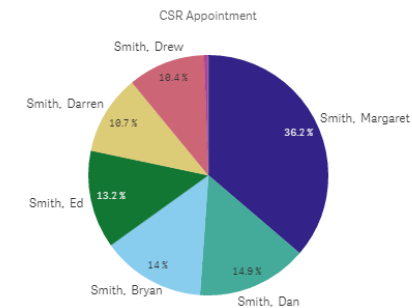
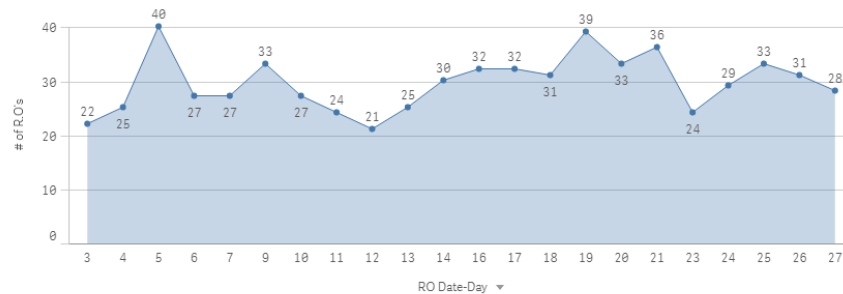
Remaining Hours To Sell Per Day

10

Additional Appts To Book Per Day

13

Number of RO's Opened By Day of Month



Technician Clocked Hours By Day- This pivot table displays information from the dispatch time clock and shows the total hours clocked in time clock by technician and day of the month.

Technician clocked hours by day						
Day ▼	Technician ▼					
	Smith, A	Smith, D	Smith, E	Smith, F	Smith, J	Smith, M
-	0.00	0.00	0.00	0.00	0.00	0.00
3 - Tue	-	13.36	8.41	9.25	2.51	9.77
4 - Wed	9.12	16.26	8.80	20.71	10.82	10.67
5 - Thu	11.16	19.47	5.94	11.66	8.48	12.22
6 - Fri	8.83	7.81	8.41	14.75	7.78	-
7 - Sat	9.81	-	8.44	10.04	16.84	9.54
9 - Mon	-	7.50	8.37	9.66	9.82	10.41
10 - Tue	-	7.78	8.67	19.89	18.66	10.06
11 - Wed	20.49	22.96	-	18.52	20.89	9.52
12 - Thu	20.00	7.68	8.47	19.73	-	11.38
13 - Fri	17.86	7.89	8.60	16.66	7.96	-
14 - Sat	11.95	5.09	8.50	16.13	15.14	9.40
15 - Sun	-	-	-	4.58	-	2.90
16 - Mon	17.82	13.08	6.38	9.45	9.48	13.11
17 - Tue	9.64	12.09	8.34	17.93	14.83	9.47
18 - Wed	7.85	17.00	-	19.75	18.63	10.39
19 - Mon	9.65	-	-	-	-	-
19 - Thu	18.68	15.44	9.00	21.50	8.31	9.89
20 - Fri	13.15	15.93	8.63	17.92	8.23	-
21 - Sat	18.12	5.40	9.36	8.26	20.40	9.38
23 - Mon	17.94	11.63	7.95	6.86	8.81	9.37
24 - Tue	-	13.00	8.30	16.83	13.52	8.99
25 - Wed	17.42	12.48	-	15.32	16.96	9.80
26 - Thu	28.88	14.77	8.36	18.16	8.48	9.00
27 - Fri	4.99	4.70	0.00	0.00	0.00	-

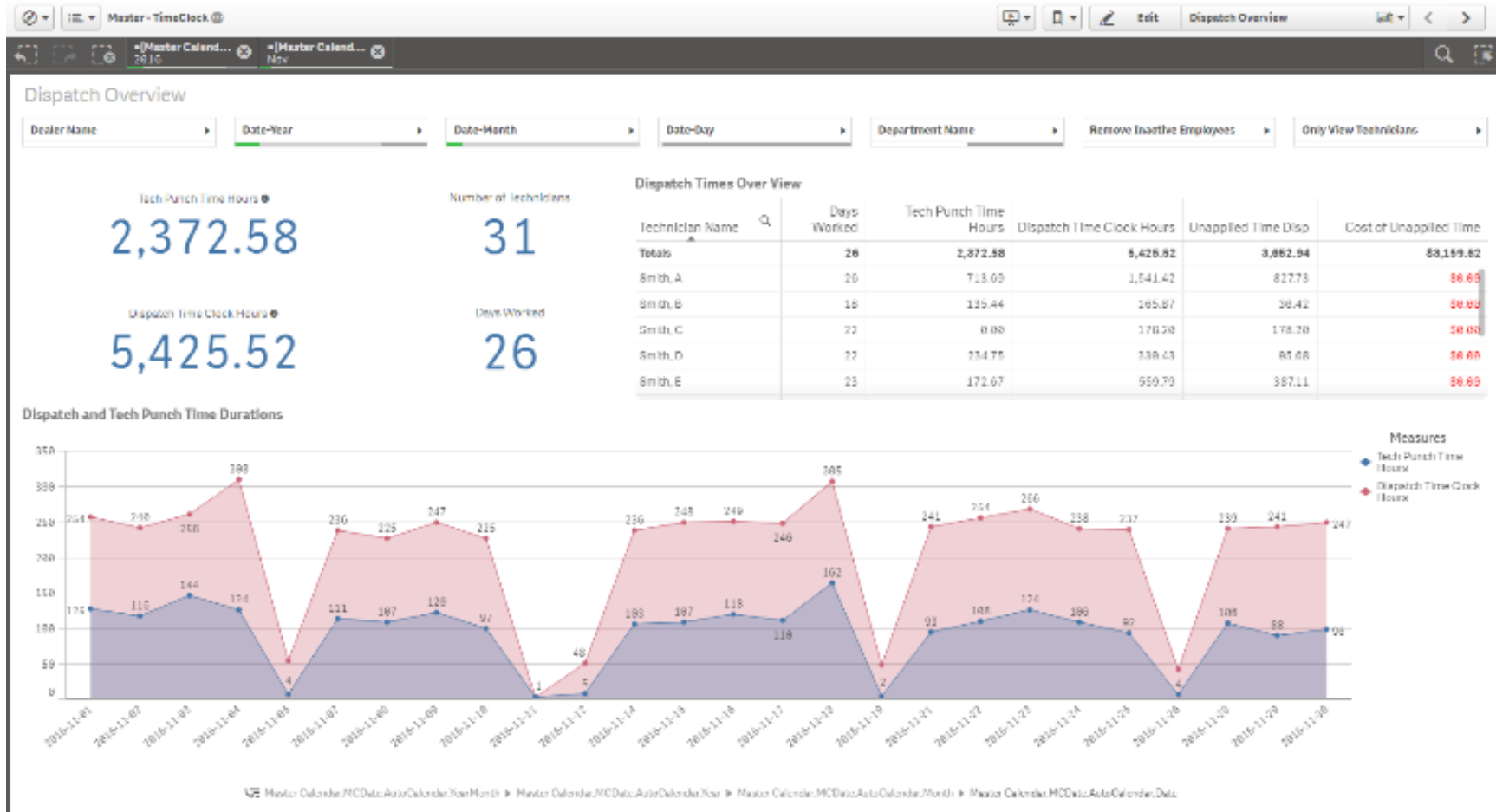
Actual Vs Booked Hours- This pivot table shows the total sold and actual hours booked on repair orders broken out by technician and pay type. You can expand each technician to drill dow to specific repair orders and even specific request lines.

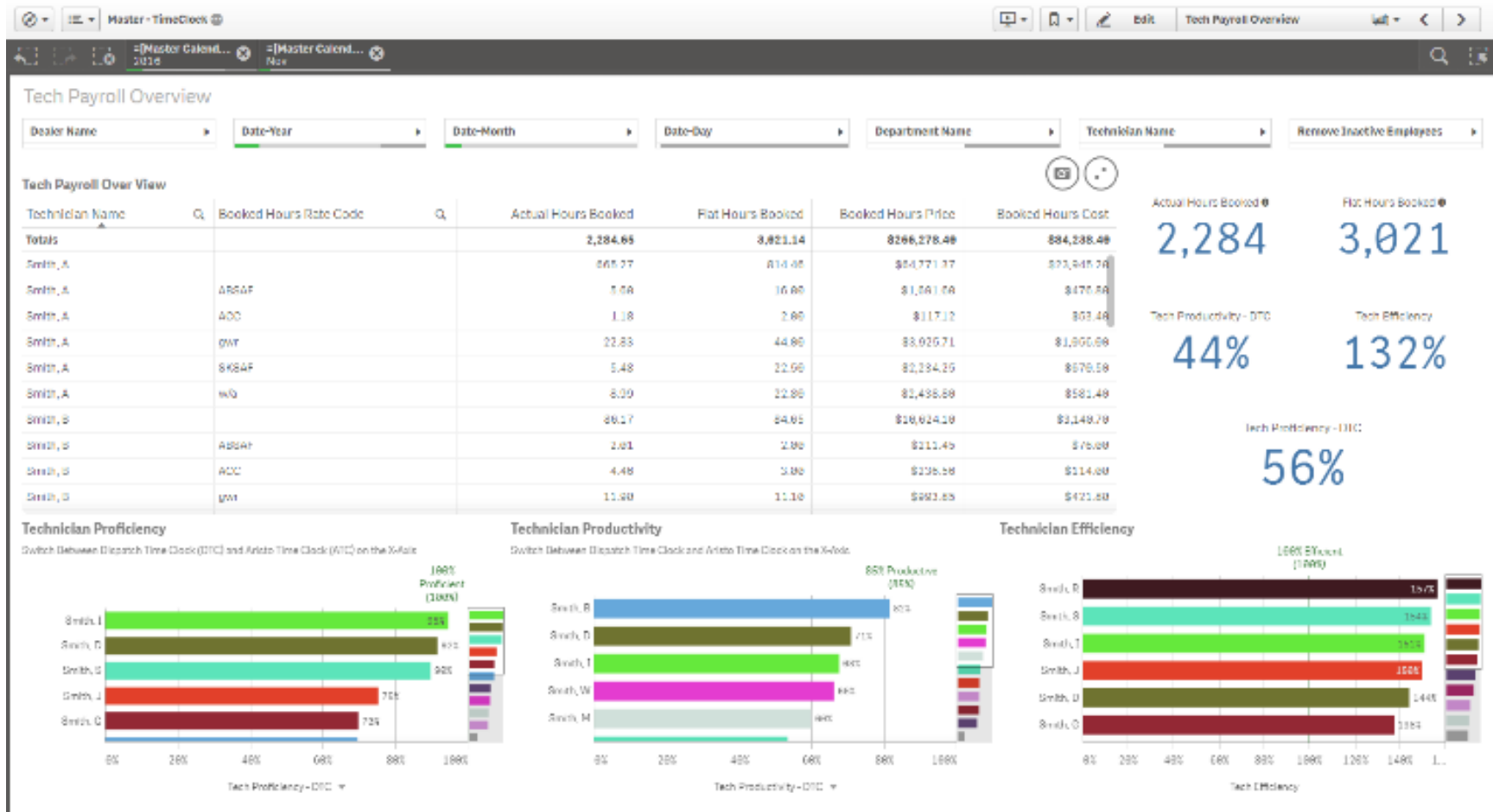
Actual vs Booked Hours						
Technician ▼	Measures		Pay Type ▼			
[Repair Order.Rep... ▼]	Actual Hours			Booked Hours		
Job Line ▼	C	W	I	C	W	I
⊕ Smith, A	92.85	32.63	3.67	82.37	35.16	3.27
⊕ Smith, D	58.15	9.98	2.22	51.69	8.82	1.59
⊕ Smith, E	46.98	14.65	0.82	39.43	17.14	0.44
⊕ Smith, F	127.03	36.13	0.35	107.76	35.83	0.35
⊕ Smith, J	62.85	9.70	2.43	54.12	9.52	2.22
⊕ Smith, M	79.93	20.32	2.57	85.76	19.08	2.31

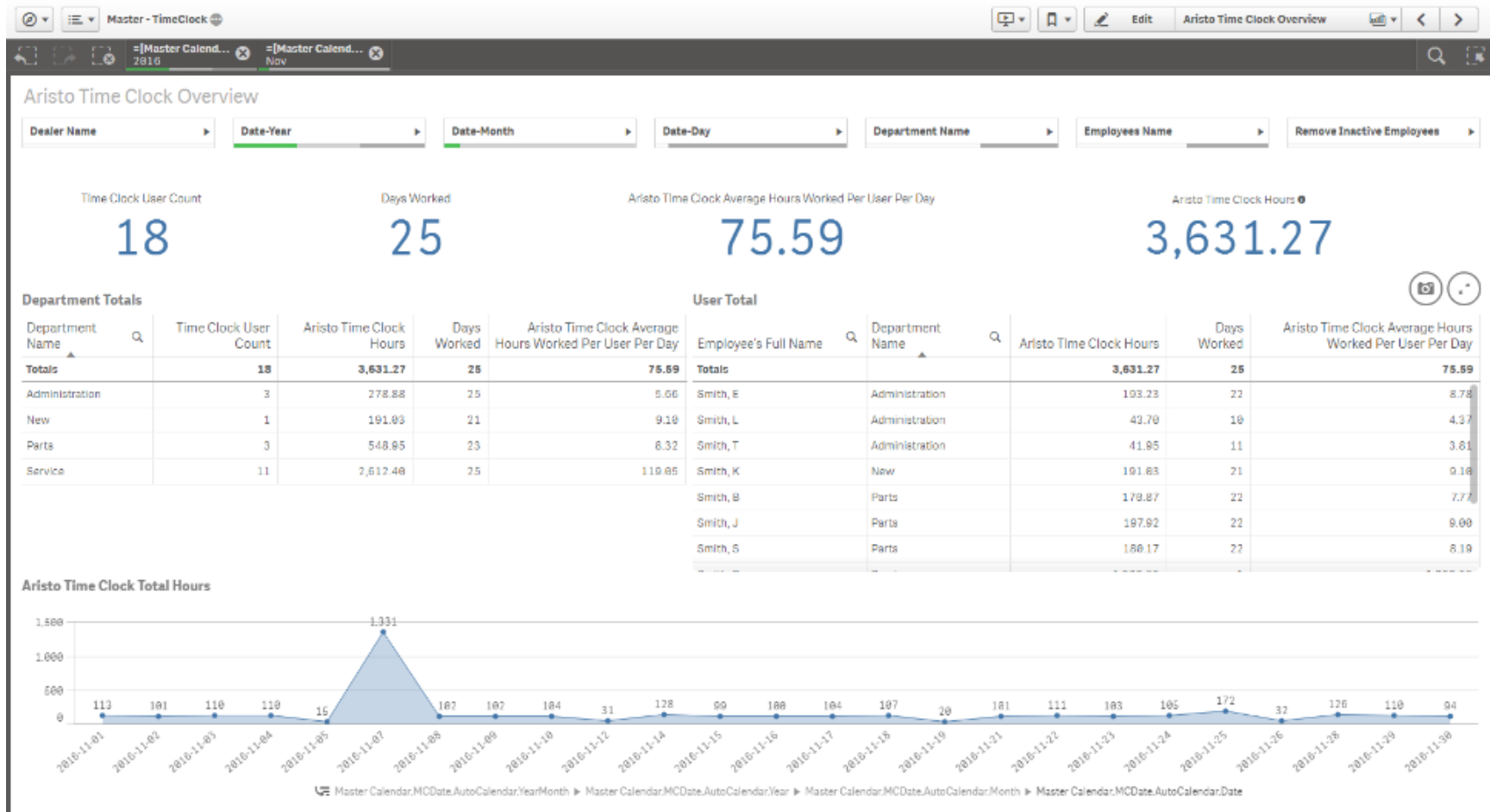
Deal Gross Profit Table- This pivot table shows deal gross profit broken out by user role and by month. Cells are colour coded to highlight months where gross profit is \$0.

Gross											
Group	Months										
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Sales	\$51,240.24	\$105,157.85	\$136,870.27	\$156,015.76	\$189,831.72	\$154,863.17	\$144,837.22	\$186,414.67	\$135,374.88	\$135,111.46	\$106,448.01
Smith_A	\$5,388.31	\$18,997.23	\$19,648.59	\$21,662.25	\$11,003.40	\$0.00	\$9,220.45	\$18,610.91	\$26,143.57	\$19,073.68	\$22,220.26
Smith_B	\$13,064.06	\$8,922.66	\$17,125.58	\$20,341.91	\$28,194.80	\$9,653.34	\$24,948.34	\$22,649.20	\$14,908.47	\$28,525.12	\$9,451.49
Smith_C	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$16,297.16	\$21,510.99	\$44,015.93	\$23,495.36	\$24,668.26	\$19,578.86
Smith_E	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Smith_G	\$4,213.64	\$9,409.17	\$9,804.73	\$17,970.76	\$11,523.52	\$12,948.04	\$27,305.53	\$27,841.70	\$25,352.67	\$15,062.16	\$16,736.40
Smith_H	\$71.70	\$0.00	\$1,357.67	\$0.00	\$200.32	\$0.00	\$599.66	\$0.00	\$0.00	\$0.00	\$0.00
Smith_J	\$8,070.47	\$22,974.60	\$24,441.96	\$25,431.35	\$44,803.81	\$55,679.50	\$19,414.39	\$24,653.74	\$9,468.91	\$16,094.66	\$10,252.70
Smith_K	\$0.00	\$0.00	\$0.00	\$0.00	\$1,695.65	\$323.65	\$0.00	\$0.00	\$189.80	\$0.00	\$0.00
Smith_L	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Smith_M	\$10,324.92	\$11,159.41	\$17,627.31	\$18,506.58	\$27,244.59	\$11,480.92	\$19,213.27	\$23,185.89	\$12,135.57	\$296.80	\$0.00
Smith_R	\$3,392.50	\$25,058.80	\$37,946.48	\$42,512.63	\$52,564.21	\$33,975.64	\$12,654.59	\$13,716.15	\$8,460.12	\$17,771.89	\$13,628.00
Smith_W	\$6,714.64	\$8,635.98	\$8,917.95	\$9,590.28	\$12,601.42	\$14,504.92	\$9,170.00	\$11,741.15	\$15,220.09	\$13,618.89	\$14,580.30
F&I	\$91,253.99	\$168,921.30	\$325,457.64	\$260,311.71	\$330,976.49	\$283,809.60	\$281,091.37	\$303,329.72	\$195,714.85	\$245,888.60	\$335,812.88

Time Clock Application- The time clock application has been added for dealerships with connection to their evolution database in PBS. This application combines data from Dispatch Time Clock, Aristo Time Clock, Tech Punch Times and Tech Payroll Hours. Sheets in the application include Dispatch Overview, Payroll Overview, Aristo TimeClock Overview, Tech Punch Time Details, Dispatch TimeClock Details, Tech Payroll Details and Aristo Timeclock Details.







Master - TimeClock

Tech Punch Time Details

Dealer Name | Date-Year | Date-Month | Date | Technician Name | Repair Order Shop | Repair Order Number

Tech Punch Time Details

Technician Name	Repair Order Number	Request Description	Punch Time Start Time	Punch Time Stop Time	Tech Punch Time Hours	Punch Time Auth Code	Punch Time Reason
Totals					2,075.88		
Smith, B	203559	REMOVE/INSTALL SNOWS - TIRE SWAPOVER(NOT ON RIMS)	2016-11-01 08:12:37	2016-11-01 08:55:22	0.71		
Smith, D	203572	ENGINE FLUSH - RUN ENGINE FLUSH AND DRAIN.	2016-11-01 09:10:49	2016-11-01 09:23:05	0.20		
Smith, B	203572	BRAKE SERVICE AND FUEL INJECTION ALREADY COMPLETED	2016-11-01 09:23:09	2016-11-01 09:23:13	0.00		
Smith, B	203572	DECLINED SERVICE-120K.	2016-11-01 09:23:17	2016-11-01 09:23:22	0.00		
Smith, B	203572	LUBE OIL AND FILTER - PERFORM LUBE, OIL, AND FILTER CHANGE	2016-11-01 09:23:29	2016-11-01 09:46:15	0.26		
Smith, B	203572	INSTALL 4 NEW TIRES- GT RADIALS	2016-11-01 09:49:18	2016-11-01 10:43:44	1.06		
Smith, D	203605	DIAGNOSE AND REPORT- CLUNKING NOISE IN BLOWER MOTOR	2016-11-01 10:43:46	2016-11-01 13:11:32	2.46		
Smith, B	203584	30MTH/60000KMSERVICE - CHANGE OIL & FILTER, CHECK ALL FLUID LEVELS, LUBE DOORS, HINGES LOCKS, CHECK	2016-11-01 13:33:21	2016-11-01 14:01:02	0.46		
Smith, B	203584	SWAP RIMS/TIRES - TIRE SWAPOVER (ON RIMS) - DO NOT INSTALL WHEEL COVERS	2016-11-01 14:01:04	2016-11-01 14:20:49	0.43		
Smith, D	203584	REPLACE BATTERY	2016-11-01 14:26:41	2016-11-01 14:26:46	0.00		
Smith, B	203631	18MTH/35000KMSERVICE - CHANGE OIL & FILTER, CHECK ALL FLUID LEVELS, LUBE DOORS, HINGES LOCKS, CHECK	2016-11-01 15:36:01	2016-11-01 15:54:02	0.30		
Smith, B	203653	9MTH/18000KM SERVICE - CHANGE OIL & FILTER, CHECK ALL FLUID LEVELS, LUBE DOORS, HINGES LOCKS, CHECK	2016-11-02 08:15:00	2016-11-02 08:44:02	0.48		
Smith, D	203665	6MTH/12000KM SERVICE - CHANGE OIL & FILTER, CHECK ALL FLUID LEVELS, LUBE DOORS, HINGES LOCKS, CHECK	2016-11-02 08:48:21	2016-11-02 09:06:19	0.30		
Smith, B	203665	REMOVE/INSTALL SNOWS - TIRE	2016-11-02 09:06:21	2016-11-02 09:52:07	0.76		



Future Projects:

Below are some of the upcoming changes and projects that the Business Intel team are working on, feel free to send in any suggestions you have for these projects.

- **Adding application for Customer Care. Access to Aristo database is required.**
- **Creating Application for Paymate Payroll.**
- **Vehicle Inventory As Of Date application.**
- **Parts Invoice and Repair Order As Of Date applications.**
- **Adding Google Maps extension.**
- **Adding Google Analytics.**
- **Adding forecasting and budgeting data from aristo database.**

As always please contact us for any help/suggestion or questions

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