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REPORTING PORTAL USAGE GUIDE

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YOUR TOTAL SERVICE RESOURCE

REPORTING PORTAL USAGE GUIDE

TABLE OF CONTENTS

LOGIN	1
wiADVISOR USAGE REPORT	6
wiADVISOR SUMMARY REPORT	8
wiADVISOR FACTORY REQUIRED DECLINED SERVICE REPORT	12
wiADVISOR APPOINTMENT LEDGER SUMMARY REPORT	14
wiADVISOR APPOINTMENT LEDGER – MISSED APPOINTMENT REPORT	18

Welcome to the wiADVISOR Reporting Usage Guide. The Reporting Portal for wiADVISOR will contain On Demand reports that a user with dealer admin rights can access at any time, select the date range, generate the report to view onscreen or export the data to Excel, PDF, or a word document. The reports will cover Usage, ROI, Advisor Performance, and indicate areas for improved dealership service sales performance. As new reports become available, they will be enabled for the dealerships to view. Each report will be covered in detail in this document and as new reports are enabled, this document will be updated to include them. If you see a new report online and would like more information, go to the KB articles in the Technical Service Portal and download the newest version of this Reporting Portal Usage Guide.

Ongoing use of the reporting at the dealership level will improve overall ROI of the wiADVISOR program and enhance customer experience as well as service department profitability. It all goes back to the old adage of **Inspect what you Expect** and the Reporting Portal gives you the tools to do the inspection. So work through this usage guide and learn to take full advantage of what the wiADVISOR Reporting Portal has to offer.

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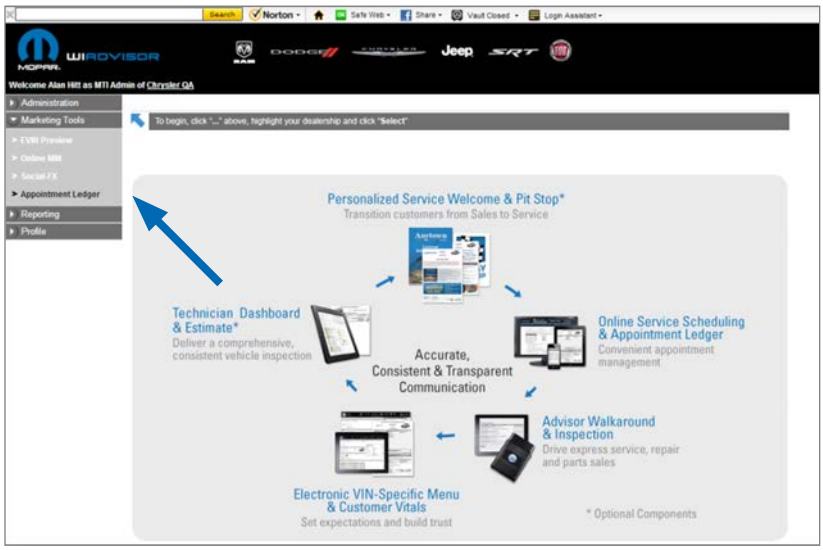
LOGIN

Log into the Reporting Portal from wiADVISOR by completing the following steps:
Click on the three horizontal lines at the top right of the dashboard from any screen.

Click on wiADVISOR Tools.

Under the Reporting tab on the left, click Reports . (Note: Make sure pop-up blockers are disabled. The area at the far right of address bar displays a pop-up blocker icon. They can be disabled from there.)



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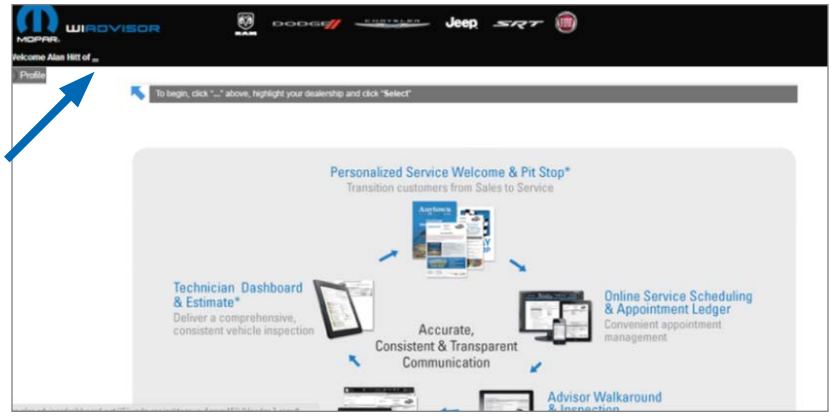
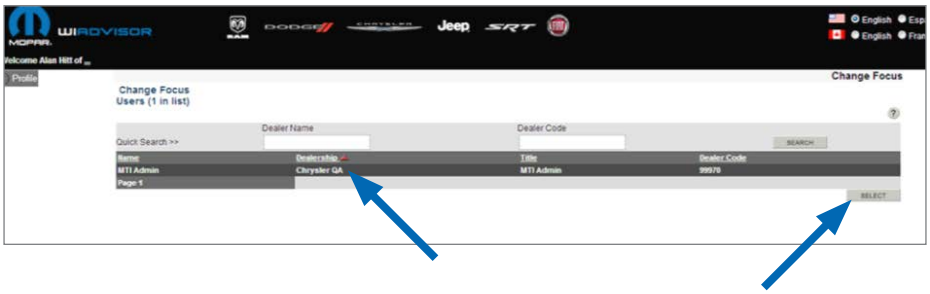
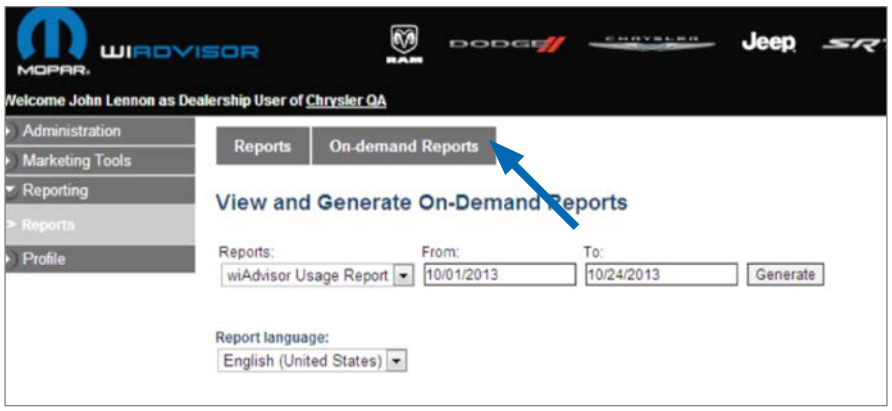
If you enter the site Chrysler.advisordashboard.net and see the following screen (Dealership name not next to Welcome (your name of (dealership name), then click the three dots (…) (See screen below)



You will see your dealership name, click it to highlight, and then hit select. (See below)



Then once again, select Reports under the Reporting tab. Once there, click on the On demand Reports tab and you will see the following screen.



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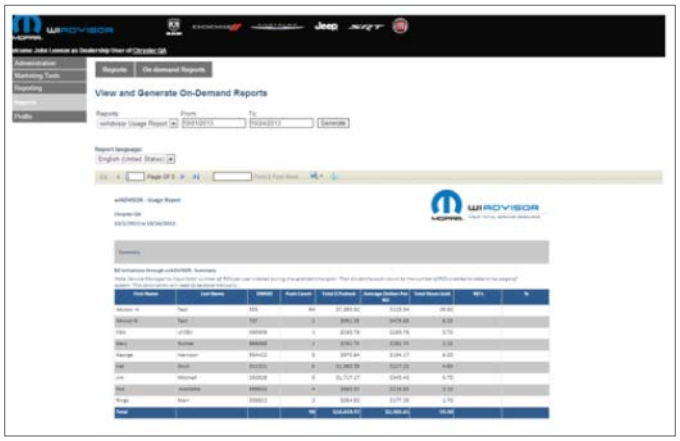
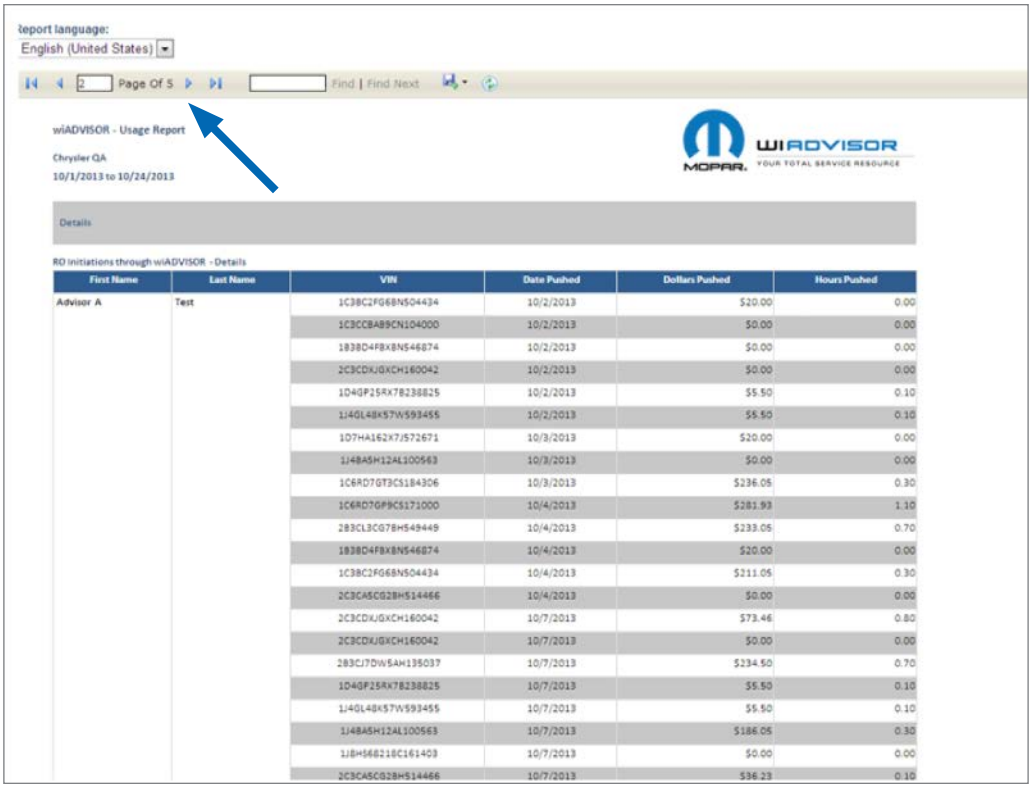
From the drop down box where it says Reports, select the report you wish to generate (in the screen shot above you see the wiADVISOR Usage Report. Select the date range (From and To), then click generate.

The longer the date range, the longer the report will take to generate. Once generated, you will see page one of the report on screen.



You can click and advance to see additional pages of the report.



First Name	Last Name	VIN	Date Pushed	Dollars Pushed	Hours Pushed
Advisor A	Test	1C3BC2FG6BN504434	10/2/2013	$20.00	0.00
		1C3CCBAB9CN104000	10/2/2013	$0.00	0.00
		1B3BD4FBXBN546874	10/2/2013	$0.00	0.00
		2C3CDXJGXCH160042	10/2/2013	$0.00	0.00
		1D4GP25RX7B238825	10/2/2013	$5.50	0.10
		1J4GL48K57W593455	10/2/2013	$5.50	0.10
		1D7HA162X7J572671	10/3/2013	$20.00	0.00
		1J4BA5H12AL100563	10/3/2013	$0.00	0.00
		1C6RD7GT3CS184306	10/3/2013	$236.05	0.30
		1C6RD7GP9CS171000	10/4/2013	$281.93	1.10
		2B3CL3CG7BH548449	10/4/2013	$233.05	0.70
		1B3BD4FBXBN546874	10/4/2013	$20.00	0.00
		1C3BC2FG6BN504434	10/4/2013	$211.05	0.30
		2C3CA5CG2BH514466	10/4/2013	$0.00	0.00
		2C3CDXJGXCH160042	10/7/2013	$73.46	0.80
		2C3CDXJGXCH160042	10/7/2013	$0.00	0.00
		2B3CJ7DW5AH135037	10/7/2013	$234.50	0.70
		1D4GP25RX7B238825	10/7/2013	$5.50	0.10
		1J4GL48K57W593455	10/7/2013	$5.50	0.10
		1J4BA5H12AL100563	10/7/2013	$186.05	0.30
		1J8HG68218C161403	10/7/2013	$0.00	0.00
		2C3CA5CG2BH514466	10/7/2013	$36.23	0.10

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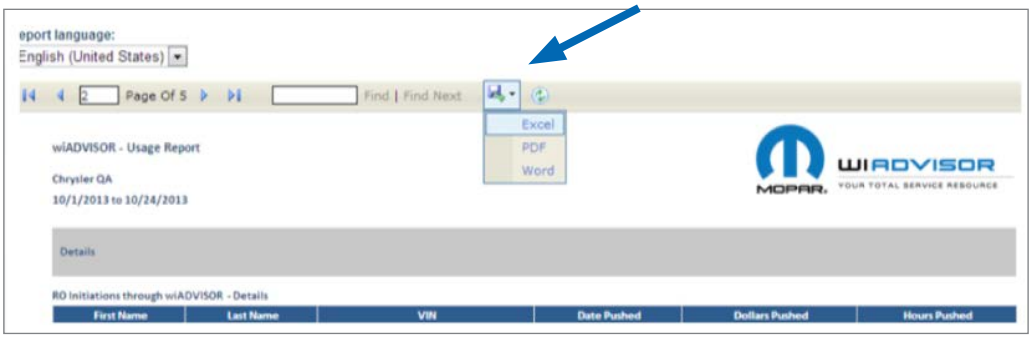
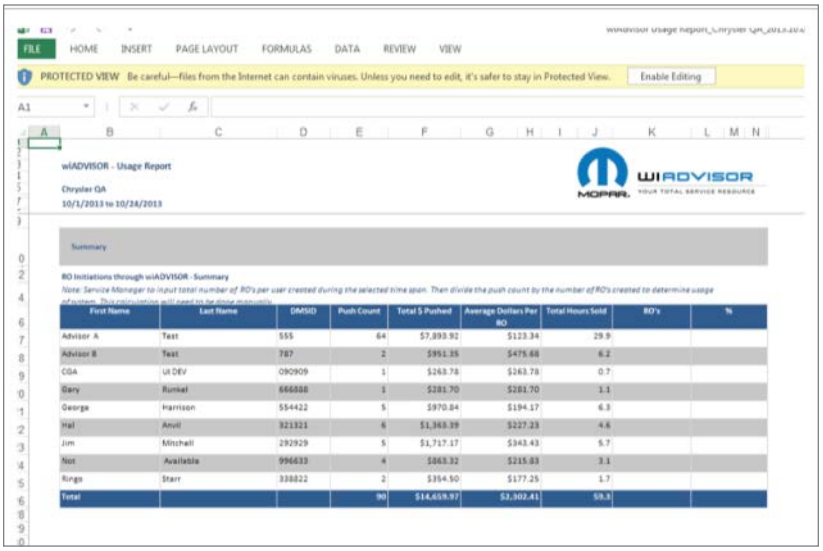
In addition, you can export the report into an easier format to share or review with others.



Click on the file logo and then select the format you wish the report to be converted to. You can choose Excel, PDF or Word. Simply click your selection, then save the file using whatever method your operating system demands. Here is a page of the same report we were looking at onscreen in a...

EXCEL FORMAT (REQUIRES MICROSOFT EXCEL)

Simply click the tabs across the bottom of the spreadsheet to look at additional pages.



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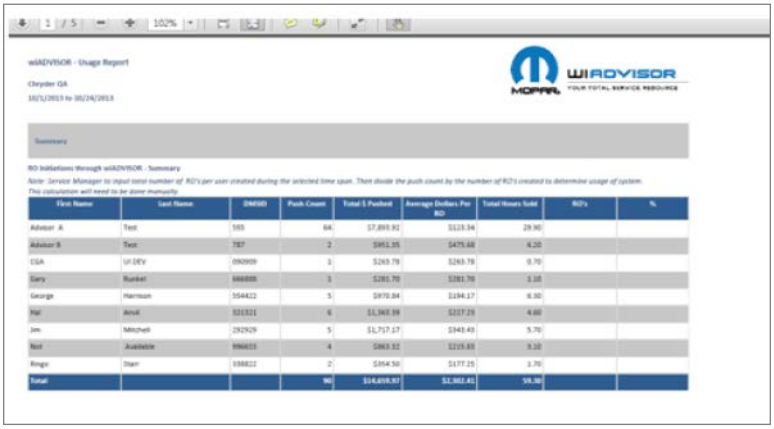
PDF FORMAT (REQUIRES ADOBE READER)

Scroll down or click page advance to see additional pages



wiADVISOR - Usage Report

Chrysler QA

10/1/2013 to 10/24/2013

Summary

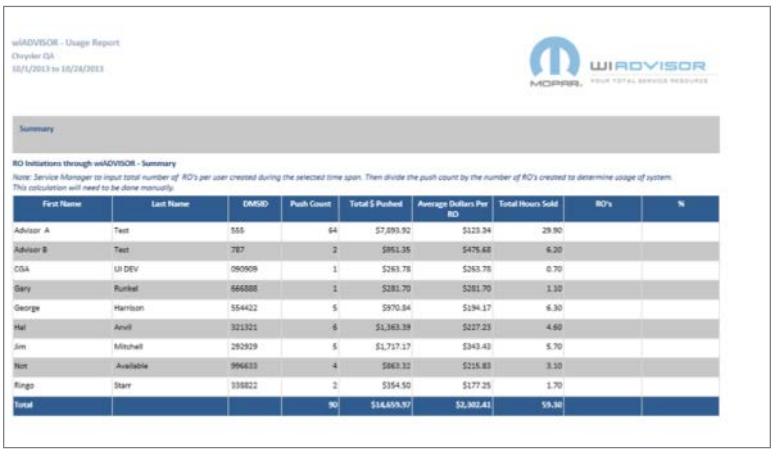
RO Initiations through wiADVISOR - Summary

Note: Service Manager to input total number of RO's per user created during the selected time span. Then divide the push count by the number of RO's created to determine usage of system.
This calculation will need to be done manually.

First Name	Last Name	DMSID	Push Count	Total $ Pushed	Average Dollars Per RO	Total Hours Sold	RO's	%
Advisor A	Test	555	64	$7,093.92	$123.34	29.90		
Advisor B	Test	787	2	$951.35	$475.68	6.20		
CGA	UI DEV	090909	1	$263.78	$263.78	0.70		
Gary	Runkel	666888	1	$281.70	$281.70	1.10		
George	Harrison	554422	5	$970.84	$194.17	6.30		
Hal	Anvil	321321	6	$1,363.39	$227.23	4.60		
Jim	Mitchell	292929	5	$1,717.17	$343.43	5.70		
Not	Available	996633	4	$863.32	$215.83	3.10		
Ringo	Starr	338822	2	$354.50	$177.25	1.70		
Total			90	$14,659.97	$2,302.41	59.30		

WORD FORMAT (REQUIRES MICROSOFT WORD)

Scroll to see additional pages.



wiADVISOR - Usage Report

Chrysler QA

10/1/2013 to 10/24/2013

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RO Initiations through wiADVISOR - Summary

Note: Service Manager to input total number of RO's per user created during the selected time span. Then divide the push count by the number of RO's created to determine usage of system.
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First Name	Last Name	DMSID	Push Count	Total $ Pushed	Average Dollars Per RO	Total Hours Sold	RO's	%
Advisor A	Test	555	64	$7,093.92	$123.34	29.90		
Advisor B	Test	787	2	$951.35	$475.68	6.20		
CGA	UI DEV	090909	1	$263.78	$263.78	0.70		
Gary	Runkel	666888	1	$281.70	$281.70	1.10		
George	Harrison	554422	5	$970.84	$194.17	6.30		
Hal	Anvil	321321	6	$1,363.39	$227.23	4.60		
Jim	Mitchell	292929	5	$1,717.17	$343.43	5.70		
Not	Available	996633	4	$863.32	$215.83	3.10		
Ringo	Starr	338822	2	$354.50	$177.25	1.70		
Total			90	$14,659.97	$2,302.41	59.30		

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wiADVISOR USAGE REPORT

Summary: wiADVISOR Usage report provides a quick view of usage by showing how many pushes there were by advisor. In addition, you will see total dollars pushed through wiADVISOR by user for the selected period, the average dollars per push as well as the total hours pushed by advisor and dealership. In addition, you will see two extra blank boxes. This is for the service manager to look in their DMS, see how many ROs were written by the advisor total, enter this number into the column marked ROs. Then divide the push count by total ROs to get the percent usage of wiADVISOR by the individual advisor as well as the dealership for overall. For example, if Advisor A had a push count of 64, but wrote a total of 100 ROs, then 64/100 would give him a 64% usage percentage.

To increase sales per RO by advisor, the manager needs them to push ROs through wiADVISOR so it can be tracked. There will be additional reports that will track break outs of Factory Required Services Sold, Dealer Recommended Services Sold, Concerns/Repairs Sold as well as Triage items sold. In addition, you will be able to see the total number of factory required services on each RO per the menu versus what was actually sold to get a true maintenance penetration. It is true that sometimes there are services sold before the factory due date, but total dollars offered versus sold will be pretty true over a significant sample size. Also, you will getting reports that will show you missed opportunities by service offering so you will know individually and by entire dealership things such as how many times was a factory required coolant service offered and how many time turned down.

How to use: First off, look at the number of pushes to see which advisors are taking advantage of wiADVISOR and following management instructions and which ones are not. It will very easy to tell with a simple pull of this report.

Next, you can compare advisor performance by looking at the dollars per RO over a time period. Compare Express lane to Express Lane advisors and Main Drive to Main Drive advisors. Also look at the hours per RO. If you have advisors selling $125.00 per push and another selling $35.00 per push, then you will know where training needs to be done.

Furthermore, in your one on one's with your advisors, you can look at the supporting documentation page as follows:

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wiADVISOR - Usage Report

Chrysler QA

10/1/2013 to 10/24/2013

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Details

RO Initiations through wiADVISOR - Details

First Name	Last Name	VIN	Date Pushed	Dollars Pushed	Hours Pushed
Advisor A	Test	1C3BC2FG6BN504434	10/2/2013	$20.00	0.00
		1C3CCBAB9CN104000	10/2/2013	$0.00	0.00
		1B3BD4FBXBN546874	10/2/2013	$0.00	0.00
		2C3CDXJGXCH160042	10/2/2013	$0.00	0.00
		1D4GP25RX7B238825	10/2/2013	$5.50	0.10
		1J4GL48K57W593455	10/2/2013	$5.50	0.10
		1D7HA162X7J572671	10/3/2013	$20.00	0.00
		1J4BA5H12AL100563	10/3/2013	$0.00	0.00
		1C6RD7GT3CS184306	10/3/2013	$236.05	0.30
		1C6RD7GP9CS171000	10/4/2013	$281.93	1.10
		2B3CL3CG7BH549449	10/4/2013	$233.05	0.70
		1B3BD4FBXBN546874	10/4/2013	$20.00	0.00
		1C3BC2FG6BN504434	10/4/2013	$211.05	0.30
		2C3CA5CG2BH514466	10/4/2013	$0.00	0.00
		2C3CDXJGXCH160042	10/7/2013	$73.46	0.80
		2C3CDXJGXCH160042	10/7/2013	$0.00	0.00
		2B3CJ7DW5AH135037	10/7/2013	$234.50	0.70
		1D4GP25RX7B238825	10/7/2013	$5.50	0.10
		1J4GL48K57W593455	10/7/2013	$5.50	0.10
		1J4BA5H12AL100563	10/7/2013	$186.05	0.30
		1J8HS68218C161403	10/7/2013	$0.00	0.00
		2C3CA5CG2BH514466	10/7/2013	$36.23	0.10
		1C4NJPFA1CD719881	10/7/2013	$57.50	0.30
		1ABHW582X8F138747	10/7/2013	$16.50	0.30
		1D7HA162X7J572671	10/7/2013	$236.05	0.30

The service manager can call up certain ROs by VIN, review with the advisor what was and was not sold. It is important to let the team know the numbers are being reviewed. Other reports coming soon will help with this as well.

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wiADVISOR SUMMARY REPORT

This report gives Service Managers more details as to what is being sold by the Service Advisors. It breaks the Total Dollars sold into Parts and Labor by type of service. In addition, this report provides two other items that are useful to the service manager. It gives a break out of the number of Triage Items sold by type. Also, a Maintenance Penetration report is included. This report looks at the percentage of Factory Required Services (FRS) sold versus the Total Dollar amount that is due at that service:

RO Initiations through wiADVISOR

Repeat of the Usage Report (see the wiADVISOR Usage Report). This gives a snapshot of how many times the Service Advisor pushed an RO through wiADVISOR during the selected date range and includes the Total RO Dollars.

wiADVISOR - Summary Report

Chrysler QA
10/1/2013 to 11/11/2013

Summary

RO Initiations through wiADVISOR - Summary

Note: Service Manager to input total number of RO's per user created during the selected time span. Then divide the push count by the number of RO's created to determine usage of system. This calculation will need to be done manually.

First Name	Last Name	DMSID	Push Count	Total $ Pushed	Average Dollars Per RO	Total Hours Sold	RO's	%
Advisor A	Test	555	119	$117,217.13	$985.02	1017.80		
Advisor B	Test	787	3	$718.98	$239.66	4.10		
CGA	UI DEV	090909	1	$172.52	$172.52	0.30		
George	Harrison	554422	33	$6,192.30	$187.65	192.60		
Hal	Anvil	321321	23	$4,072.08	$177.05	328.20		
Jim	Mitchell	292929	22	$3,475.14	$157.96	21.30		
John	Lennon	996633	28	$4,877.78	$174.21	482.60		
Paul	McCartney	774411	14	$2,999.93	$214.28	319.70		
Ringo	Starr	338822	7	$1,255.27	$179.32	6.40		
Sales	Manager	963	2	$413.13	$206.57	1.60		
Todd	Chizmar	999	4	$1,367.90	$341.98	158.80		
Total			256	$142,762.16	$557.66	2533.40		

Actual Dollars Sold Report

Divides the Total Dollars sold into Factory Required Services, Dealer Recommended Services, Customer Concerns (Repairs) and Triage Items and breaks this down even further into number of lines sold, hours sold, $ Parts, $ Labor and the $ Total.

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wiADVISOR - Summary Report

Chrysler QA

10/1/2013 to 11/11/2013

Actual Dollars Sold Report

		Advisor A Test	Advisor B Test	CGA UI DEV	George Harrison	Hal Anvil	Jim Mitchell	John Lennon	Paul McCartney	Ringo Starr	Sales Manager	Todd Chizmar	Total
Factory Required Pushed (FRS)	# of lines	254	5	1	83	42	71	78	46	21	7	9	617
	Hours	54.00	1.00	0.30	17.90	9.80	11.80	13.90	11.30	3.50	1.60	2.10	127.20
	$ Parts	$9,647.85	$345.77	$157.52	$5,400.61	$1,885.18	$2,261.26	$2,087.40	$1,651.03	$847.88	$369.83	$490.04	$23,144.37
	$ Labor	$1,481.17	$58.00	$15.00	$3.02	$169.90	$182.23	$544.00	$279.68	$123.90	$43.30	$135.00	$3,035.20
	$ Total	$11,129.02	$403.77	$172.52	$5,403.63	$2,055.08	$2,443.49	$2,631.40	$1,930.71	$971.78	$413.13	$625.04	$26,179.57
Dealer Recommended Pushed (DRS)	# of lines	99	3	0	25	30	10	26	7	1	0	2	203
	Hours	952.30	1.10	0.00	164.70	314.90	5.50	460.20	302.40	1.40	0.00	150.70	2353.20
	$ Parts	$683.98	$15.93	$0.00	$124.83	$188.76	$75.88	$170.76	$19.00	$0.00	$0.00	$0.00	$1,279.14
	$ Labor	$5,250.18	$142.28	$0.00	$1,263.44	$1,533.24	$431.77	$1,338.12	$582.72	$91.99	$0.00	$196.86	$10,830.60
	$ Total	$5,934.16	$158.21	$0.00	$1,388.27	$1,722.00	$507.65	$1,508.88	$601.72	$91.99	$0.00	$196.86	$12,109.74
Repairs Pushed	# of lines	31	2	1	27	6	8	22	8	3	0	7	115
	Hours	11.50	2.00	0.00	10.00	3.50	4.00	8.50	6.00	1.50	0.00	6.00	53.00
	$ Parts	$75.00	$0.00	$0.00	$150.00	$75.00	$0.00	$150.00	$75.00	$75.00	$0.00	$75.00	$675.00
	$ Labor	$100,078.95	$157.00	$0.00	$1,040.40	$220.00	$424.00	$587.50	$392.50	$116.50	$0.00	$471.00	$103,487.85
	$ Total	$100,153.95	$157.00	$0.00	$1,190.40	$295.00	$424.00	$737.50	$467.50	$191.50	$0.00	$546.00	$104,162.85
Triage Items Pushed	# of lines	26	0	1	25	12	10	13	4	0	0	4	95
	Hours	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	$ Parts	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	$ Labor	$0.00	$0.00	$0.00	$210.00	$0.00	$100.00	$0.00	$0.00	$0.00	$0.00	$0.00	$310.00
	$ Total	$0.00	$0.00	$0.00	$210.00	$0.00	$100.00	$0.00	$0.00	$0.00	$0.00	$0.00	$310.00
Total Pushed	# of lines	410	10	3	160	90	99	139	65	25	7	22	1030
	Hours	1017.80	4.10	0.30	192.60	328.20	21.30	482.60	319.70	6.40	1.60	158.80	2533.40
	$ Parts	$10,406.83	$361.70	$157.52	$5,675.44	$2,148.94	$2,337.14	$2,408.16	$1,745.03	$922.88	$369.83	$565.04	$25,098.51
	$ Labor	$106,810.30	$357.28	$15.00	$2,516.86	$1,923.14	$1,138.00	$2,469.62	$1,254.90	$332.39	$43.30	$802.86	$117,663.65
	$ Total	$117,217.13	$718.98	$172.52	$6,192.30	$4,072.08	$3,475.14	$4,877.78	$2,999.93	$1,255.27	$413.13	$1,367.90	$142,762.16

Maintenance Penetration Report

Measures a Service Advisor's ability to sell by showing the percentage of what is actually sold to what should have been sold in a perfect situation.

wiADVISOR - Summary Report

Chrysler QA

10/1/2013 to 11/11/2013

Maintenance Penetration Report

First Name	Last Name	DMSID	$ Factory Required Potential	$ Factory Required Pushed	$ Factory Required Declined	% Maintenance Penetration
Advisor A	Test	555	$21,504.60	$11,129.02	$10,375.58	51.75%
Advisor B	Test	787	$1,083.05	$403.77	$679.28	37.28%
CGA	UI DEV	090909	$200.52	$172.52	$28.00	86.04%
George	Harrison	554422	$5,185.51	$3,403.63	$1,781.88	65.64%
Hal	Anvil	321321	$4,120.28	$2,055.08	$2,065.20	49.88%
Jim	Mitchell	292929	$4,199.32	$2,443.49	$1,755.83	58.19%
John	Lennon	996633	$3,803.07	$2,631.40	$1,171.67	69.19%
Paul	McCartney	774411	$2,956.30	$1,930.71	$1,025.59	65.31%
Ringo	Starr	338822	$1,047.30	$971.78	$75.52	92.79%
Sales	Manager	963	$413.13	$413.13	$0.00	100.00%
Todd	Chizmar	999	$1,169.35	$625.04	$544.31	53.45%
Total			$45,682.43	$26,179.57	$19,502.86	57.31%

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Triage Report

Breaks out the number of times the advisor sold various Triage Items (# of Flash Updates, Recalls, RRTs and DTCs) compared to the total number of pushes.

Triage Report

First Name	Last Name	# of RO pushes	# of flash updates	# of recalls	# RRTs	# DTCs	# Total Triage
Advisor A	Test	119	13	6	4	3	26
Advisor B	Test	3	0	0	0	0	0
CGA	UI DEV	1	1	0	0	0	1
George	Harrison	33	10	9	1	5	25
Hal	Anvil	23	5	4	1	2	12
Jim	Mitchell	22	5	1	0	4	10
John	Lennon	28	7	5	1	0	13
Paul	McCartney	14	0	2	1	1	4
Ringo	Starr	7	0	0	0	0	0
Sales	Manager	2	0	0	0	0	0
Todd	Chizmar	4	0	3	1	0	4

Factory Required Services $ Pushed

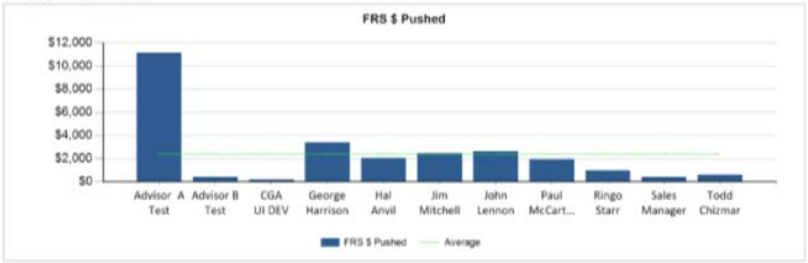
Graphic representations of the Factory Required Service dollars sold, Hours sold, Dealer Recommended Service dollars sold, and Repair Dollars pushed. Each of the graphs includes an average line in green for a quick look at how the Service Advisors are doing versus the dealership average.

wiADVISOR - Summary Report

Chrysler QA

10/1/2013 to 11/11/2013

Factory Required Services $ Pushed



Factory Required Services $ Pushed

First Name	Last Name	FRS $ Pushed
Advisor A	Test	$11,129.02
Advisor B	Test	$403.77
CGA	UI DEV	$172.52
George	Harrison	$3,403.63
Hal	Anvil	$2,055.08
Jim	Mitchell	$2,443.49
John	Lennon	$2,631.40
Paul	McCartney	$1,930.71
Ringo	Starr	$971.78
Sales	Manager	$413.13
Todd	Chizmar	$625.04
Total		$26,179.57

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RO Initiations through wiADVISOR

Finally, there is a breakout by the advisor of all of the individual VINs if the service manager needs to look at specific ROs. Since the RO is created after the push, the RO number was not available, so the service manager can look up the record by VIN number and date.

wiADVISOR - Summary Report

Chrysler QA

10/1/2013 to 11/11/2013

RO Initiations through wiADVISOR

First Name	Last Name	VIN	Date Pushed	Dollars	Hours	FRS	DRS	Repairs	Triage
Advisor A	Test	1J4GA59127L145824	10/1/2013	$492.96	3.60	$492.96	$0.00	$0.00	$0.00
		2ABHR54P78R694340	10/1/2013	$0.00	0.00	$0.00	$0.00	$0.00	$0.00
		1C3CDFCB3DD315685	10/2/2013	$646.58	2.90	$568.08	$0.00	$78.50	$0.00
		1J4GB59107L173554	10/6/2013	$40.00	0.30	$40.00	$0.00	$0.00	$0.00
		1ABHW58207F516086	10/7/2013	$80.73	0.40	$80.73	$0.00	$0.00	$0.00
		1ABHW58207F516086	10/7/2013	$40.73	0.10	$40.73	$0.00	$0.00	$0.00
		1ABHW58207F516086	10/7/2013	$98.00	1.00	$0.00	$98.00	$0.00	$0.00
		1DBHB48P39F701276	10/7/2013	$158.50	1.70	$80.00	$0.00	$78.50	$0.00
		1C3CDWDA5CD536595	10/7/2013	$70.00	0.70	$70.00	$0.00	$0.00	$0.00
		1C3CDFCHXDD118856	10/8/2013	$78.50	1.00	$0.00	$0.00	$78.50	$0.00
		1B3HB48A69D180352	10/8/2013	$80.00	0.70	$80.00	$0.00	$0.00	$0.00
		1C4RDHAG0DC592624	10/9/2013	$12.00	0.30	$12.00	$0.00	$0.00	$0.00
		1ABHW58207F516086	10/9/2013	$80.73	0.40	$80.73	$0.00	$0.00	$0.00
		1D7HU18NX8J131947	10/9/2013	$80.00	0.70	$80.00	$0.00	$0.00	$0.00
		1J8GN58K18W164040	10/9/2013	$40.00	0.30	$40.00	$0.00	$0.00	$0.00
		2C3CDYAG6DH553897	10/9/2013	$157.00	2.00	$0.00	$0.00	$157.00	$0.00
		2C3CCAET5CH100506	10/9/2013	$80.73	0.40	$80.73	$0.00	$0.00	$0.00
		2ABHR54P78R694340	10/10/2013	$655.45	4.70	$655.45	$0.00	$0.00	$0.00
		2ABHR54P78R694340	10/10/2013	$110.73	0.70	$110.73	$0.00	$0.00	$0.00
		2C3CDYBT6DH552194	10/10/2013	$80.00	0.70	$80.00	$0.00	$0.00	$0.00
		1C4RJEAT8DC547449	10/10/2013	$80.00	0.70	$80.00	$0.00	$0.00	$0.00
		3A8FY48B98T117468	10/10/2013	$40.73	0.10	$40.73	$0.00	$0.00	$0.00
		2C3CDYBT6DH552194	10/10/2013	$40.00	0.30	$40.00	$0.00	$0.00	$0.00
		1D7PL46KX35110520	10/10/2013	$158.50	1.00	$0.00	$80.00	$78.50	$0.00
		1D3HB18P69S722733	10/10/2013	$172.52	0.30	$172.52	$0.00	$0.00	$0.00
		1B3EL46X14N129433	10/10/2013	$57.52	0.40	$57.52	$0.00	$0.00	$0.00
		2D8GV58235H680788	10/10/2013	$207.52	0.40	$207.52	$0.00	$0.00	$0.00
		2C3CCAFJXDH507276	10/10/2013	$30.00	0.30	$30.00	$0.00	$0.00	$0.00

How to Use

The service manager can view the reports not only as to who is using wiADVISOR, but how well they are selling the various types of services. For example:

- If one Express Lane Service Advisor is selling an average of $65 in FRS per RO and another is selling $35 in FRS per RO, then the Service Manager will know where to provide additional training
- If one Service Advisor sold 50 flashes in a month and another sold 4, then the odds are that the second Service Advisor is not using the microPod. (Use it as a barometer)
- If one Service Advisor is at 35% Maintenance Penetration and another is at 5%, then the second Service Advisor is probably skipping over FRS. Review maintenance penetrations, create atmosphere of competition between advisors to have the best maintenance penetration. This is good for the customer and for dealership. Set a maintenance penetration goal for the service department.

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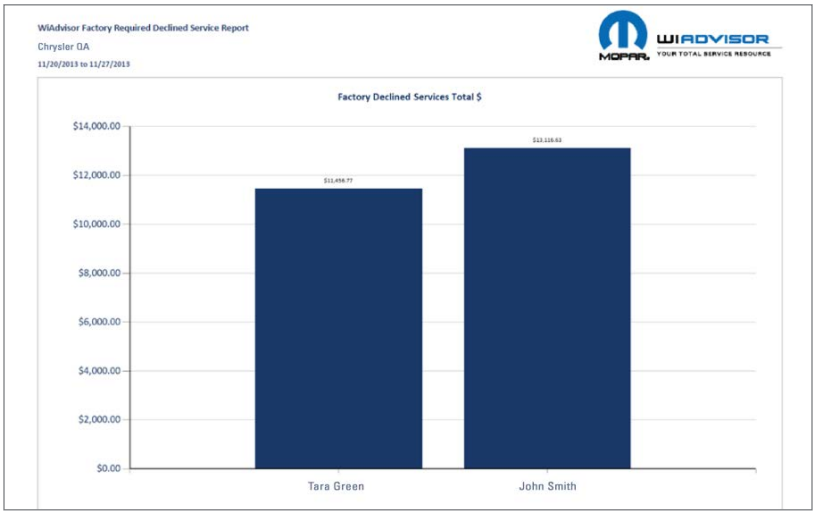
wiADVISOR FACTORY REQUIRED DECLINED SERVICE REPORT

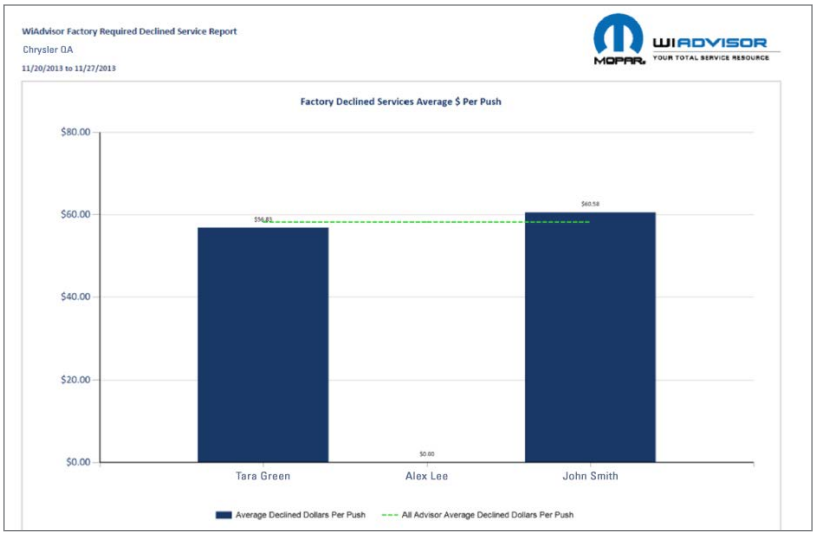
The wiADVISOR Factory Required Declined Service Report provides three important things for managing a department:

- total dollars lost from factory required declined services by advisor for selected time period
- average dollars lost from factory declined services by advisor per RO push for selected time period
- breakout by Make of the number of times a particular service was offered, the number of times it was declined and percentage and dollars involved by advisor and department

Factory Declined Services Total $: Graph report showing total dollars of missed opportunity by advisor for the selected time period.



Factory Declined Service Average $ per push: Graph showing the average dollars per RO push per advisor of missed opportunity by advisor. The green dashed line is the dealership average for comparison purposes.



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Breakout of Declined Services by Make: List of all factory required services that were due at the various mileage intervals that were displayed on wiADVISOR. The report displays the number of times it was offered by advisor as well as dealer total, the percentage of times declined by advisor as well as dealership, and the lost dollars involved in not selling the particular service by advisor and by dealership.

WiAdvisor Factory Required Declined Service Report

Chrysler QA

11/20/2013 to 11/27/2013

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Service Description	Advisor	# of Times Offered	# of Times Declined	% of Times Declined	Total $ of Declined Services
Replace engine air cleaner filter [Pacifica 2004-2007]	John Smith	1	1	100.00 %	$35.50
	Service Total	1	1	100.00 %	$35.50
Replace engine air cleaner filter [Sebring 2007-2010]	Tara Green	2	2	100.00 %	$56.20
	Service Total	2	2	100.00 %	$56.20
Replace engine air cleaner filter [Town & Country 2008-2010]	John Smith	3	2	66.67 %	$54.30
	Service Total	3	2	66.67 %	$54.30
Replace engine air cleaner filter [Town & Country 2011-2012]	John Smith	3	2	66.67 %	$55.90
	Tara Green	1	0	0.00 %	$0.00
	Service Total	4	2	50.00 %	$55.90
Replace engine air filter [300 2013]	Tara Green	1	1	100.00 %	$36.20
	Service Total	1	1	100.00 %	$36.20
Replace engine oil and filter [4.5 quarts]	John Smith	5	2	40.00 %	$69.20
	Tara Green	33	18	54.55 %	$622.80
	Service Total	38	20	52.63 %	$692.00
Replace engine oil and filter [5 quarts]	John Smith	9	4	44.44 %	$138.40
	Tara Green	7	4	57.14 %	$138.40
	Service Total	16	8	50.00 %	$276.80
Replace engine oil and filter [6 quarts]	John Smith	84	48	57.14 %	$1,831.20
	Tara Green	132	72	54.55 %	$2,746.80
	Service Total	216	120	55.56 %	$4,578.00
Replace engine oil and filter [7 quarts]	John Smith	4	2	50.00 %	$83.40
	Tara Green	1	0	0.00 %	$0.00
	Service Total	5	2	40.00 %	$83.40
Replace ignition cables [2.4L Sebring 01-06]	John Smith	1	1	100.00 %	$330.36
	Service Total	1	1	100.00 %	$330.36
Replace platinum spark plugs [3.5L/3.8L Pacifica 04-06]	John Smith	1	1	100.00 %	$190.20
	Service Total	1	1	100.00 %	$190.20
Replace standard spark plugs [2.4L 200 2011-2012]	Tara Green	1	1	100.00 %	$86.00
	John Smith	1	1	100.00 %	$86.00
	Service Total	2	2	100.00 %	$172.00

How to Use

Things to look for on the wiADVISOR Factory Required Declined Service Report:

- Look at the average dollars of declined services per advisor. This number goes hand in hand with the maintenance penetration chart from the Summary Report. It is a good measure of advisor performance. If you have three advisors that have an average of $40 in declined services per RO pushed and another at $90, then you know where you need to motivate, train or replace. The manager needs to decide what an acceptable average is and manage to it.
- Look at key services such as Tire Rotation. This is a critical service as it gets the vehicle up in the air and the wheels off, leading to brake work, exhaust leaks, fluid leaks, CV joint work, etc. If you have an advisor with 70% declined tire rotations, then additional training is needed as he is costing the dealership quite a bit of money, not only for the rotations, but all of the spin off work as well.
- This report pinpoints where your missed opportunity revenue is as it relates to factory required maintenance.

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wiADVISOR APPOINTMENT LEDGER SUMMARY REPORT

Summary: The wiADVISOR Appointment Ledger Summary Report accumulates data from the Appointment Ledger, concentrating on the assigned advisor for the appointments, the appointment source, the type of services booked, and finally, the user that created the appointment. The final piece who made the appointments, will not work properly until sometime in March of 2014. For the time being, it will only show "system user", but the rest of the report is very helpful as well.

Keep in mind that the selected date range in the **wiADVISOR Appointment Ledger Summary report reflects the day that the appointments were created on.** If a dealer books ten appointments today and runs the report, it will show the ten appointments created today, even though the appointments could have been set for next week or next month. If the dealer wants to know what date or how many are booked for a certain day, then use the appointment ledger and look at the day, week or month in question.

WiAdvisor Appointment Ledger - Summary Report

Chrysler QA

2/1/2014 to 2/10/2014

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Summary

Appointments Booked for advisor (based on date appointment was scheduled, not date of appointment)

		Appointment Type					Potential ROI $			
Advisor Name	# of appointments	Appointment Ledger	Personalized Service Welcome	Book Next Service Appointment	Dealer Web Site Appointment	DMS Appointment Feed	Factory Required Maintenance Booked	Dealer Recommended Maintenance Booked	Concerns Booked	Total
Rick Grimes	47	34	1	0	1	11	$424.95	$92.90	$0.00	$517.85
Booker DeWitt	56	46	0	0	0	10	$483.95	$454.70	$0.00	$938.65
Andrew Ryan	76	73	2	0	0	1	$2,954.90	$39.90	$0.00	$2,994.80
Frank Thomas	47	35	0	0	1	11	$268.80	$194.85	$0.00	$463.65
Total	226	188	3	0	2	33	$4,132.60	$782.35	$0.00	$4,914.95

Page 1 above, list the advisors, the total # of appointments created for them, and then breaks out the source of the appointment (whether it was generated in the Appointment Ledger or from the Online Service Scheduler). Then the report breaks out the dollars of the service categories that the services were booked for: Factory Required, Dealer Recommended or Repairs/Concerns. A dealer will use this section to determine if the appointments are being distributed according to plan as well as to determine if the user is suggesting services or not.

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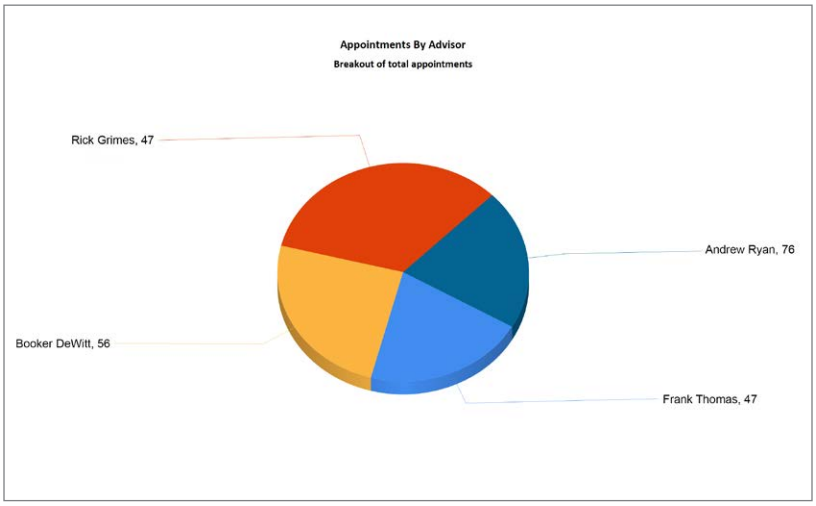
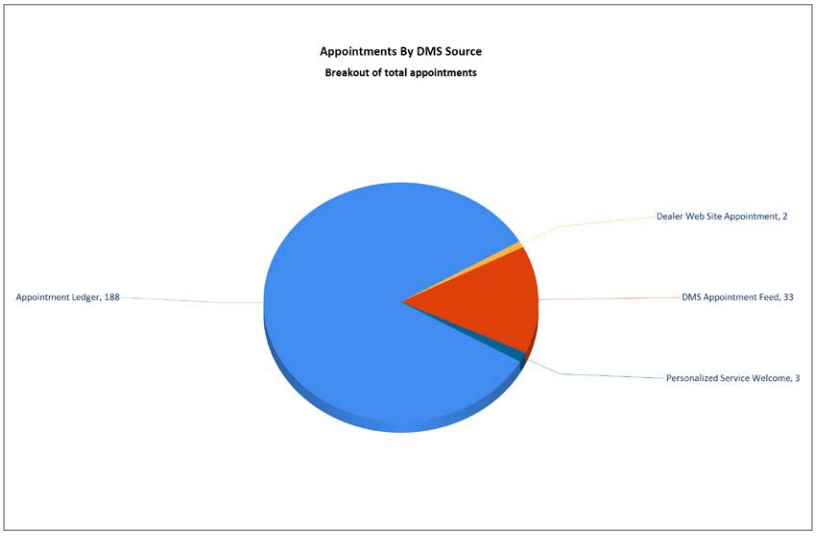
Page 2 is a graphical pie chart displaying the distribution of the advisors.



Page 3 is a graphical representation of the appointment source.



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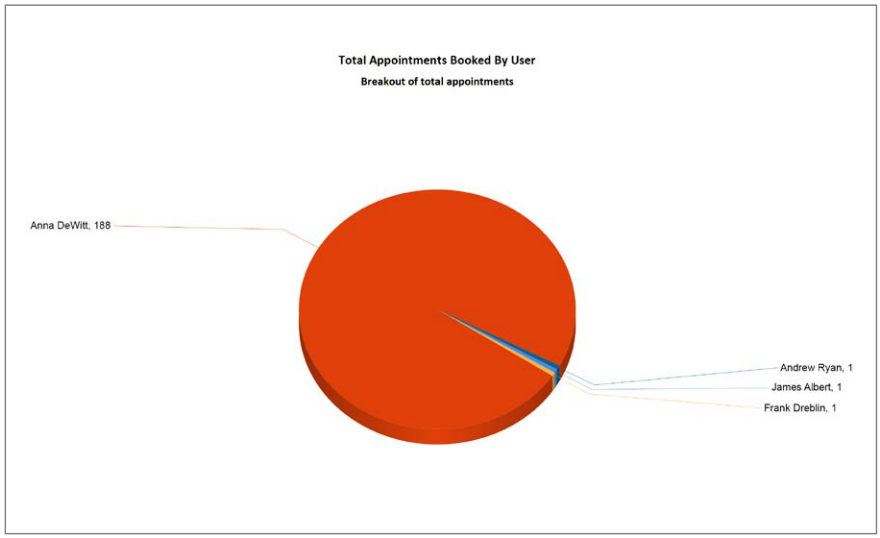
Page 4 is a chart displaying the user that actually created the appointment (coming in March of 2014), once again breaking out the dollars for each of the service types.

Appointments Booked by user (who created the appointment) (based on date appointment was actually booked, not date scheduled for)

		Appointment Type			Potential ROI $				
User Name	# of appointments	Appointment Ledger	Personalized Service Welcome	Book Next Service Appointment	Factory Required Maintenance Booked	Dealer Recommended Maintenance Booked	Concerns Booked	Total	Average $ per appointment
Richard Comstock	1	0	1	0	$0.00	$0.00	$0.00	$0.00	$0.00
George Roberts	1	0	1	0	$0.00	$0.00	$0.00	$0.00	$0.00
Richard Price	188	188	0	0	$4,036.35	$782.35	$0.00	$4,818.70	$25.63
Anthony Stark	1	0	1	0	$0.00	$0.00	$0.00	$0.00	$0.00
Total	191	188	3	0	$4,036.35	$782.35	$0.00	$4,818.70	$25.63

Page 5 is a graphical representation in the form of a pie chart showing the user that created the appointment.



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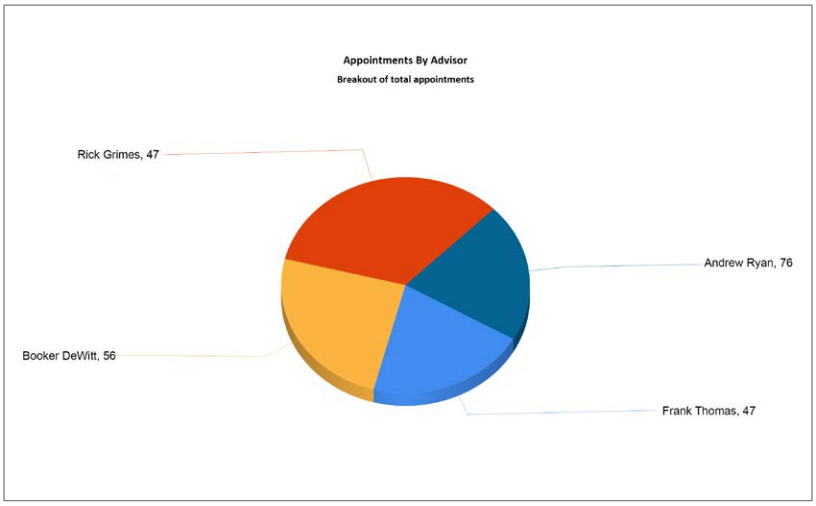
Page 6 is a pie chart breakout showing the dollars booked by user creating the appointment. N/A at this time. To be added later.



Page 7 on are the details of each appointment by user who booked the appointment with the details for the appointment.

Details

Appointment Booked By	Customer First Name	Customer Last Name	VIN (last 8)	Date Appointment Created	Scheduled Appointment Date	Status	Factory Required Maintenance Booked	Dealer Recommended Maintenance Booked	Concerns Booked	Total
James Albert			ES184788	2/7/2014	6/7/2014	BOOKED	$0.00	$0.00	$0.00	$0.00
Frank Dreblin	Richard	Smith	ER251037	2/7/2014	6/7/2014	BOOKED	$0.00	$0.00	$0.00	$0.00
Anna DeWitt	Bill	Thomas	CG126118	2/1/2014	2/1/2014	SHOWN	$0.00	$0.00	$0.00	$0.00
	Steve	Rogers	DS656123	2/1/2014	2/3/2014	SHOWN	$0.00	$0.00	$0.00	$0.00
	James	Talbot	7B171825	2/3/2014	2/3/2014	SHOWN	$0.00	$0.00	$0.00	$0.00
	Wendy	Stevens	XR426518	2/3/2014	2/3/2014	SHOWN	$0.00	$0.00	$0.00	$0.00
		John Smith Llc	DR584342	2/3/2014	2/3/2014	SHOWN	$0.00	$0.00	$0.00	$0.00
	Bruce	Johnson	AR357063	2/3/2014	2/3/2014	SHOWN	$0.00	$0.00	$0.00	$0.00
	Rick	Amos	7J548607	2/3/2014	2/3/2014	SHOWN	$0.00	$0.00	$0.00	$0.00
	Daniel	Kremp	8R139698	2/3/2014	2/3/2014	SHOWN	$0.00	$0.00	$0.00	$0.00
	William	Kent	AR155876	2/3/2014	2/3/2014	SHOWN	$38.15	$0.00	$0.00	$38.15
	Rob	Stark	CN211009	2/1/2014	2/4/2014	SHOWN	$0.00	$0.00	$0.00	$0.00
	Tim	Ericson	BC739746	2/3/2014	2/4/2014	SHOWN	$0.00	$0.00	$0.00	$0.00
	Ernest	Grey	9J519765	2/3/2014	2/4/2014	SHOWN	$41.70	$59.95	$0.00	$101.65
	Paul	Green	EC112039	2/3/2014	2/4/2014	SHOWN	$0.00	$0.00	$0.00	$0.00
	Tom	Stamp	DH644123	2/3/2014	2/4/2014	SHOWN	$38.15	$0.00	$0.00	$38.15
	Lauren	Holly	BL569919	2/3/2014	2/4/2014	SHOWN	$0.00	$0.00	$0.00	$0.00
	Anna	Larson	6F112220	2/4/2014	2/4/2014	SHOWN	$0.00	$0.00	$0.00	$0.00
	Red	Hanson	6H198414	2/4/2014	2/4/2014	SHOWN	$0.00	$0.00	$0.00	$0.00
	Kevin	Smith	CR330270	2/3/2014	2/4/2014	SHOWN	$0.00	$0.00	$0.00	$0.00
	John	Kelly	BH528366	2/4/2014	2/4/2014	SHOWN	$0.00	$0.00	$0.00	$0.00
	Wally	West	DR662826	2/4/2014	2/4/2014	SHOWN	$0.00	$59.95	$0.00	$59.95
	Hal	Jordan	DS580499	2/4/2014	2/4/2014	SHOWN	$0.00	$0.00	$0.00	$0.00
	Jim	Grayson	6G184306	2/3/2014	2/4/2014	SHOWN	$0.00	$0.00	$0.00	$0.00

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wiADVISOR APPOINTMENT LEDGER – MISSED APPOINTMENT REPORT

Summary: This is a report that can be generated for any selected date and it displays the customer name, assigned advisor, appointment time and date, appointment status (Missed), phone number, year, Make, Model, last 8 of the VIN, email address and dollars that were booked on the appointment. This report is used for a quick follow-up of missed appointments. Keep in mind, the Appointment Ledger changes an appointment status from Booked to Shown **only when wiADVISOR is used to push the RO.** If the RO is not pushed within 1 hour of appointment scheduled due date & time or if an advisor used the DMS directly to push the RO, the appointment status will change to Missed and appear on this report.

WiAdvisor Appointment Ledger - Missed Appointments Report

Chrysler QA

2/1/2014 to 2/10/2014

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Customer Name	Service Advisor	Date of Scheduled Appointment	Time of Scheduled Appointment	Status	Default Phone Number	Other Phone Number	Vehicle (Year, Make, Model)	Last 8 of VIN	Email Address	Missed Appointment $
Darryl Jackson	Reggie Simpson	2/10/2014	08:45	Missed	703-517-3744		2004 JEEP Grand Cherokee (4.7L)	4C140081		$0.00
Kim Stewart	James Thomas	2/10/2014	14:00	Missed	941-380-8081		2012 CHRYSLER 300 (3.6L)			$0.00
Stephen Blue	Glenn Smith	2/10/2014	14:45	Missed	408-764-6781		2011 DODGE Grand Caravan (3.6L)			$0.00
Arnold Bransen	Brian Austin	2/10/2014	15:30	Missed	724-518-4612		2008 DODGE Challenger SRT (6.1L)			$76.55
Total										$76.55

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