Service Management - Profit & Productivity - Help Screen Main Menu

General Excel Workbook Outline and Instructions

Welcome and thank you for using this Excel® workbook which will monitor the essential data needed to effectively manage, control and grow a profitable Service Department. The concept of this workbook is simple; develop a reporting and tracking tool which manages Technician Time and Labor Cost, while identifying productivity weaknesses and strengths.

What makes this management tools unique, it's simple. Even after reading and studying an endless stream of Service Department development reports, it still comes down to the basics, managing the Technicians time, the Cost of that Technician and the number of Labor Hours that must be sold to maintain a profitable department.

The information needed to utilize and maintain this workbook is likely already being complied on a daily basis in either the accounting department or service department and only needs to be organized for this comprehensive labor sales ~ cost reporting system to be successful.

As for using this workbook, it is intentionally designed for inexperienced Excel users and personnel of clerical skill levels. Excel programming features such as Forms Buttons, Menu Driven Worksheets and Macro Programs (Visual Basic) have been implemented to simplify its usage. The spreadsheets are color coded, there are no worksheet "Tabs", formulas to enter and the possibility of overwriting structured formulas has been eliminated. **The only spreadsheet cells that allow an entry are "Yellow in Color".**

Advice to Experienced Excel users, think outside of the box and allow this user-friendly workbook and its spreadsheets to do the work within this comprehensive service labor sales reporting system.

Remember, only spreadsheet cells, **"Yellow in Color"**, allow an entry. Occasionally a cell may turn "Red", indicating a potential error which allows a correcting entry.

Getting Started …. Simple Steps to Prepare the Workbook for Daily Usage in a Simple Order …..

~ 1 ~ Click on all the above Help Screen forms buttons and review the program notes

~ 2 ~ Begin the workbook Calendar Setup, located on the Default Setup worksheet, even if not using the Payroll Preparation Reports

~ 3 ~ Read the Flat Rate or Hourly Help Screen to better understand the reporting processes in place for Setting-up and Monitoring different pay plans.

~ 4 ~ Enter each individual Technicians information on the Default Setup worksheet, Tech number and name, including Sales Type Labor Costs

~ 5 ~ Last but not least, finalize the Default Setup worksheet by entering the, Number of Active Technicians, Available Clock Hours, Productivity Report Headings

Workbook Setup Complete …. Now ready for daily usage …..

Service Labor Management Analysis Reports

Daily Sales Activity Report - Accessed from the Main Menu, Dropdown box on the upper left corner allows you to select any one day to review productivity.
Weekly & Monthly Reports - Productivity Reports accessed from the Main Menu, Monthly Report only includes active month values. Weekly reports are based on payroll week.

Payroll Preparation Workbook Feature

This workbook has the capability of producing payroll summary worksheets, simply by utilizing the information being entered to track Technicians Daily Productivity.
These **Customizable Summary Worksheets** could easily be submitted to the individual responsible for processing the payroll, eliminating possible errors and repetitive work

It is not required that you use this feature to enjoy the benefits of this Excel workbook. But, definitely should be considered at some point in time so to fully utilize its capabilities.