

# Report - Management

## KPI: Key Performance Indicators

The reason for this report is to allow a shop to set a time period (KPI) for how long a job can stay in a status before it is alerted as a problem. By using this report it becomes easier for a shop to understand which jobs may be delayed or lead into a complaint as they are not being handled effectively and as per the businesses targets and SLAs with their Insurer partners.

The below explains how to set the report up:

Within general settings the Bodyshop can set up when the target should go green, amber and red. These are set as %'s so if the target timeframe is 1 hour and the amber trigger is at 50% then the job will turn amber when the job has been in the status for 30mins> (up to and until the red trigger).

The screenshot shows the Audatex PlanManager interface. On the left is a sidebar with navigation options: COMMUNICATION, HELP, WORKSHOP, JOB, PLANNING, REPORT, MAINTENANCE, SYSTEM (highlighted), RENTAL, and INVOICING. The main area is titled 'General settings' and contains a 'Configuration Editor' for 'reports'. The editor shows the 'Name' as 'KPI\_TARGET\_PERCENTAGES' and the 'Value' as '0'. Below this, there are input fields for 'green' (0), 'amber' (75), and 'red' (100). A 'Save' button is at the bottom. To the right of the editor is a table with columns: Name, Location, Category, and Value. The table contains two rows: 'KPI\_TARGET\_PERCENTAGES' with location 'reports' and value 'green=0, amber=75, red=100', and 'WEEKLY\_JOB\_COMPLETIONS' with location 'reports' and value '0'.

Name	Location	Category	Value
KPI_TARGET_PERCENTAGES	reports		green=0, amber=75, red=100
WEEKLY_JOB_COMPLETIONS	reports		0

Within the Status set up page (Settings>Lists>Status). The user can define the KPI target for each status. Not every status must have a KPI target only the ones the shop would like to report on.

The KPI can be set as days and/or hours. These are calendar times, so 7 days will include Saturdays and Sundays. Calendar days was selected as this is easier to handle with moving of Bank holidays and also is a standard understanding regardless of country, region and process.

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Sequencia	NameIn	NameOut
2	Customer contacted no answer	Customer contacted no answer
3	New	New
10	Appointment	Appointment
30	Awaiting Estimate	Awaiting Estimate
35	Planned	Planned
40	In Progress	In Progress
80	Completed	Completed
85	Delivered/Picked up	Delivered/Picked up
90	Invoice	Invoice
97	Merged	Merged
98	On Hold	On Hold

With the report configured, when run the user will see the report as per below, the user can export and schedule this report if the please.

The jobs are also selectable, so they can select a line to go straight into the job to gather more information or take any necessary actions.

Status	KPI Time	Job	Key Tag Number	Registration	Make	Model
Customer contacted no answer	0%	680		W333LLR	PEUGEOT	2008 PEUGEOT MISTRAL
Appointment	13%	681		W333LLR	PEUGEOT	2008 PEUGEOT MISTRAL
Awaiting Estimate	0%	679		W333LLR	PEUGEOT	2008 PEUGEOT MISTRAL
In Progress	0%	677		W333LLR	PEUGEOT	2008 PEUGEOT MISTRAL
In Progress	0%	676		W333LLR	PEUGEOT	2008 PEUGEOT MISTRAL
In Progress	0%	686		W333LLR	PEUGEOT	2008 PEUGEOT MISTRAL
In Progress	0%	673	36	W333LLR	PEUGEOT	2008 PEUGEOT MISTRAL
In Progress	0%	675	35	W333LLR	PEUGEOT	2008 PEUGEOT MISTRAL
Completed	0%	687		W333LLR	PEUGEOT	2008 PEUGEOT MISTRAL
Completed	0%	679		W333LLR	PEUGEOT	2008 PEUGEOT MISTRAL
Delivered/Picked up	0%	674		W333LLR	PEUGEOT	2008 PEUGEOT MISTRAL
Delivered/Picked up	0%	682		W333LLR	PEUGEOT	2008 PEUGEOT MISTRAL
Delivered/Picked up	0%	683		W333LLR	PEUGEOT	2008 PEUGEOT MISTRAL
Delivered/Picked up	100%	679	5	W333LLR	PEUGEOT	2008 PEUGEOT MISTRAL

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