

Push Reports



Module: Parts and Service

Description	Frequency	Who	Method
Parts Sales Order Invoicing - Back Orders Created without a Contact Code registered Search: Display of all Backorders for customers with Contact code equal to Cash Sales and Type CASH. Content: Date/time, Branch, Franchise Part Number, Total Order, Salesperson, User Name	Now	Parts Mgr	Email
Price \$ Changes – Report to identify pricing changes away from 1, 2, 3, 4 levels excluding Special Pricing established. Search: Selling of Parts where sales value deviates from either 1, 2, 3, 4 Levels excluding Special Pricing Content: Date/time, Branch, Franchise Part Number, Total Order, Salesperson, User Name	Daily	Parts Mgr	Email
Special Price (Changes) – changes to Special Price Maintenance Search: Any changes made Special Pricing to be reported Content: Date/time, Branch, Franchise Part Number, User Name	Weekly	General Mgr	Email
Parts Purchase Orders without Repair Order or Parts Order lodged against the Purchase Order excluding Stock Orders Search: Parts Purchase Orders without Repair Order or Parts Order lodged against the Purchase Order excluding Stock Orders Content: Date/time, Purchase Order Number, Branch, Franchise Part Number, Salesperson, User Name	Now	Parts Mgr	Email
Parts Stock Item Receipt Entry - Parts Freight - 50%+ of Invoice Value to be flagged Search: Parts Stock Item Receipt Entry where Parts Freight value is 50% + of Invoice Value to be flagged Content: Date/time, Branch, Supplier Number and Name, Total Invoice Value, Freight Value, User Name	Now	Parts Mgr	Email
Parts Maintenance - newly created Parts not in Manufacturer Masterfile Search: Newly Created Parts in INMASTER that don't exist in Manufacturer file Content: Date/time, Branch, Franchise, Part Number, User Name	Weekly	Parts Mgr	Email
Repair Order Invoicing – email sent at specified time after Repair Order progress status = Work Completed by Technician Search: Repair Order Invoicing – email after Repair Order progress status = Work Completed by the Service Clerk or Technician Content: RO Number, Date Completed, Service Advisor, Customer Name, Rego, Job Type, Actual Dollar Value	Now	Service Mgr	Email
Technician Clocking - Report non-attendance of technicians by 10 am excluding Field Technicians Search: Technician Clocking - Report non-attendance of technicians by 10 am excluding Field Techs Content: Date/Time, Technician Code and Name, Last clocked off time	Now	Service Mgr	Email
Workshop Attendance – identify all Technicians that don't have 7.60 hours against Mechanic record for given day Search: Workshop Attendance to identify all Technicians that don't have 7.60 hours against Mechanic record for given day - report by 10am following day Content: Date, Technician Code and Name	Daily	Service Mgr	Email
Service Retention – no Service Bookings 180 days after sale, 180 days after last service, 365/730 days after last service Search: Service Retention – no Service Bookings 180 days after sale, 180 days after last service, 365/730 days after last service Content: Rego Number, Driver Full Name, Business Phone, Mobile Number, Account Name, Make, Model, Sale Date, Last Service Date	Monthly	Service Mgr	Email
Contact – Report to show Contact Analysis across all databases within date ranges Search: Contact Cleanse View – Report to show Contact Analysis across all databases within activity date ranges	Weekly	General Mgr	Email
Fraud Push Reports for Parts and Service Department			
Report all Purchase Order Deletions – Parts Sundry and Sublet purchase orders Search: Report all Purchase Order Deletions – Parts, Sundry and Sublet purchase orders Content: Order Date, Purchase Order Type, Vendor Code and Name, Order Value, RO Number, Purchase Order Description, User Name	Now	General Mgr	Email
Credit Override Report – Report identify customers receiving overrides Search: Report to identify Credit Overrides given throughout the period selected, also Service Reversals Content: Date/time, Branch, Customer Number and Name, Total Value, Salesperson, User Name	Weekly	General Mgr	Email
Stock Adjustments downwards by Part Number greater than \$100.00 Search: Stock Adjustments downwards by Part Number greater than \$100.00 Content: Branch, Franchise, Part Number, Total Value, Salesperson, Reason for Adjustment	Weekly	Parts Mgr	Email
Cash Sales Debtor (+) Value – Parts/Service Invoicing without Counter Receipt completed Search: Sales to Cash Sale flagged Debtor that have not used Counter Receipt Entry and amount remains outstanding on debtors Content: Date/time, Branch, Customer Number and Name, Total Value, Salesperson, User Name	Now	Parts Mgr	Email/SMS
Open Repair Orders - Aged Open Repair Orders by Job Type Search: Display of all WIP of Open Repair Orders summarised by Job Type ((Retail, Warranty, Internal) importantly Aged by RO Creation Date with Dollar Exposure Content: RO Number, Creation Date, Days Open, Service Advisor, Customer Name, Rego, Job Type, Actual Dollar Value	Weekly	General Mgr	Email
Parts Open Order and Quotes – Are any of them to customers who are on STOP CREDIT this could indicate unauthorised credit being provided. Why are there Cash Sales on Open Quotes? Search: Parts Quotes and Orders against Debtors with Stop Credits and any Cash Sale Account Content: Date/time, Branch, Customer Number and Name, Total Value, Salesperson, User Name	Weekly	General Mgr	Email

Push Reports



Module: Showroom (SRM) and Vehicles/Wholegoods

Report Code	Description	Content of Report	Method	Frequency	Who
V-001	Reception Call Manager - Calls created logged not converted to a Prospect - still "Reception"	Date Time Creation, Branch, Contact Via, Salesperson Referred to, Name, Call Back Method, Phone Number, Description	Email	Daily	Sales Mgr.
V-002	Prospect Maintenance - Incomplete information based on one of the following fields; Marketing Source, Vehicle Type, Franchise, Interested Make, Interested Model, Trading Make, Trading Model	Salesperson, Creation Date, Prospect Code, Company, Full Name, Email, Mobile Number	Email	Daily	Sales Mgr.
V-003	Salesperson Task List - Listing of all Prospects that don't currently have Tasks allocated to them.	Salesperson, Creation Date, Prospect Code, Company, Full Name, Email, Mobile Number	Email	Daily	Sales Mgr.
V-004	Salesperson Task List - Traffic Light Prospecting - 14+ Days = RED, 8-14 days = Yellow, Less than 7 Days = Green - from Creation Date of Prospect Code.	Salesperson, Creation Date, Prospect Code, Company, Full Name, Email, Mobile Number, Latest Task, Interested In Make/Model	Email	Daily	Sales Mgr.
V-005	Prospect Maintenance - Closed Dealership Owned Prospects - Ensure all CLOSED Prospects Status have Marketing Campaign Program Name attached or Follow-up Date allocated.	Salesperson, Creation Date, Prospect Code, Company, Full Name, Email, Mobile Number, Latest Task, Interested In Make/Model	Email	Daily	Marketing Mgr.
V-006	Appraisals - Delivery Date - Display of Appraised Vehicles grouped 7/14/21+ Days from Delivery Date. To ensure that for MyDeal ORDERS we avoid Buyers acquiring these vehicles until are given a Stock Number.	MyDeal Order, Make, Model, Year, Appraised Value, Appraised Date, Salesperson	Email	Daily	Used Car/Buyer Mgr.
V-007	MyDeal - Estimated Delivery Date - Display of all ORDERS that are ACTIVE that don't have an Estimated Delivery Date. To ensure that for MyDeal ORDERS PreDelivery is not compromised.	MyDeal Order, Make, Model, Year, Salesperson, Prospect Company and Full Name	Email	Daily	Sales Mgr./Stock Controller
V-008	MyDeal - No Stock Number - Display of all ORDERS that are ACTIVE that don't have a Stock number Allocated. To ensure that for MyDeal ORDERS PreDelivery is not compromised.	MyDeal Order, Make, Model, Year, Salesperson, Prospect Company and Full Name	Email	Daily	Sales Mgr./Stock Controller
V-009	MyDeal - No Receipted Deposits - Display of all ORDERS that are ACTIVE that don't have a Receipted Deposit, Excluding Sales Type Fleet.	MyDeal Order, Make, Model, Year, Salesperson, Prospect Company and Full Name	Email	Daily	Sales Mgr.
V-010	MyDeal - Registration Required not Ticked - Display of all QUOTES and ORDERS that are ACTIVE that don't have ticked in On Road Cost that is not Ticked.	MyDeal Order, Make, Model, Year, Salesperson, Prospect Company and Full Name	Email	Daily	Sales Mgr.
V-011	MyDeal - Factory Claims Outstanding including Holdback - Display of all QUOTES and ORDERS for New Vehicles that are ACTIVE that don't have amounts in Factory Claims.	MyDeal Order, Make, Model, Year, Salesperson, Prospect Company and Full Name	Email	Daily	Sales Mgr.
V-012	MyDeal - User Defined Codes entered to ensure accurate Quoting and Internal costing - Display of all QUOTES and ORDERS for Vehicles that are ACTIVE for Accessories and Aftermarket Codes.	MyDeal Order, Make, Model, Year, Salesperson, Prospect Company and Full Name, Code Entered, Description, Sale and Cost Values.	Email	Daily	Sales Mgr./Service Manager
V-013	MyDeal - Default Delivery Fee - Display of all QUOTES and ORDERS for Vehicles that are ACTIVE that don't have a Delivery Value - Ensure all Vehicles are prepared correctly with pre-delivery fee charged.	MyDeal Order, Make, Model, Year, Salesperson, Prospect Company and Full Name	Email	Daily	Sales Mgr.
V-014	MyDeal - Aftermarket TAB not selected - Ensure all Vehicles are given the appropriate opportunity to have Aftermarket Items sold by the Dealership.	MyDeal Order, Make, Model, Year, Salesperson, Prospect Company and Full Name	Email	Daily	Aftermarket Mgr./Sales Mgr.
Fraud Push Reports for Vehicles and Wholegoods Department					
V-015	Average Profit and Loss by Wholesaler - consistent losses may indicate a relationship between the Wholesaler and the Used Vehicle/Wholesale Manager or "kick-backs"	Selection by Salesperson Acquired Code and Date Range showing the following fields; Stock Number, Rego, Make, Model, Previous Owner, Sale Date, Sales Value and Profit.	Email	Weekly	General Manager
V-016	Vehicles Purchased from and sold to same Wholesaler - an unusual practice which may indicate the Manager is Reconditioning Vehicles for friends. Display all Vehicles where the Previous Owner and Current Owner are the same.	Selection by Salesperson Acquired Code and Date Range showing the following fields; Stock Number, Rego, Make, Model, Previous Owner, Purchased Date, Sale Date, Sales Value and Profit.	Email	Weekly	General Manager
V-017	Vehicles Purchased reconditioned and wholesaled within 30 Days - this is an indication of vehicles being reconditioned for a friend. Check for Vehicles which are purchased and then wholesaled (Sales Type "Wholesale") within 30 days with Workshop Invoice attached.	Selection by Salesperson Acquired Code and Date Range showing the following fields; Stock Number, Rego, Make, Model, Previous Owner, Purchased Date, Sale Date, Sales Value and Profit.	Email	Weekly	General Manager
V-018	Average Age of Vehicles Wholesaled - how long is it taking for the dealer to wholesale their Vehicles. If greater than 14 days it may indicate delays in Invoicing by the Wholesaler and/or Used Vehicle Manager. Check for Vehicles which are purchased and then wholesaled (Sales Type "Wholesale") greater than 14 days from Purchase Date to Report Date.	Selection by Salesperson Acquired Code and Date Range showing the following fields; Stock Number, Rego, Make, Model, Current Owner, Days Since Purchased, Sales Value and Profit.	Email	Daily	General Manager
V-019	Payments of Vehicles Wholesaled - Check for Vehicles wholesaled (Sales Type "Wholesale") greater than 7 days from Sale Date. Check for Wholesaled Vehicles that have deposits or part payments as this should not be accepted. Also Check for all Wholesaled Vehicles that don't have a UNITS generated Receipt Number.	Selection by Salesperson Acquired Code and Sale Date Range showing the following fields; Stock Number, Rego, Make, Model, Current Owner, Sales Value and Profit.	Email	Daily	General Manager
V-020	Payments of Vehicles - display all Vehicle Receipts are to be a Stock Number/Invoice Number or MyDeal Order Number. Payments to Customer Accounts can be promote the lapping of Debtors and incorrect aging of debtor balances.	Selection by Sale Date Range showing the following fields; Stock Number, Rego, Make, Model, Current Owner, Amount Owed, Sales Value and Profit.	Email	Daily	General Manager