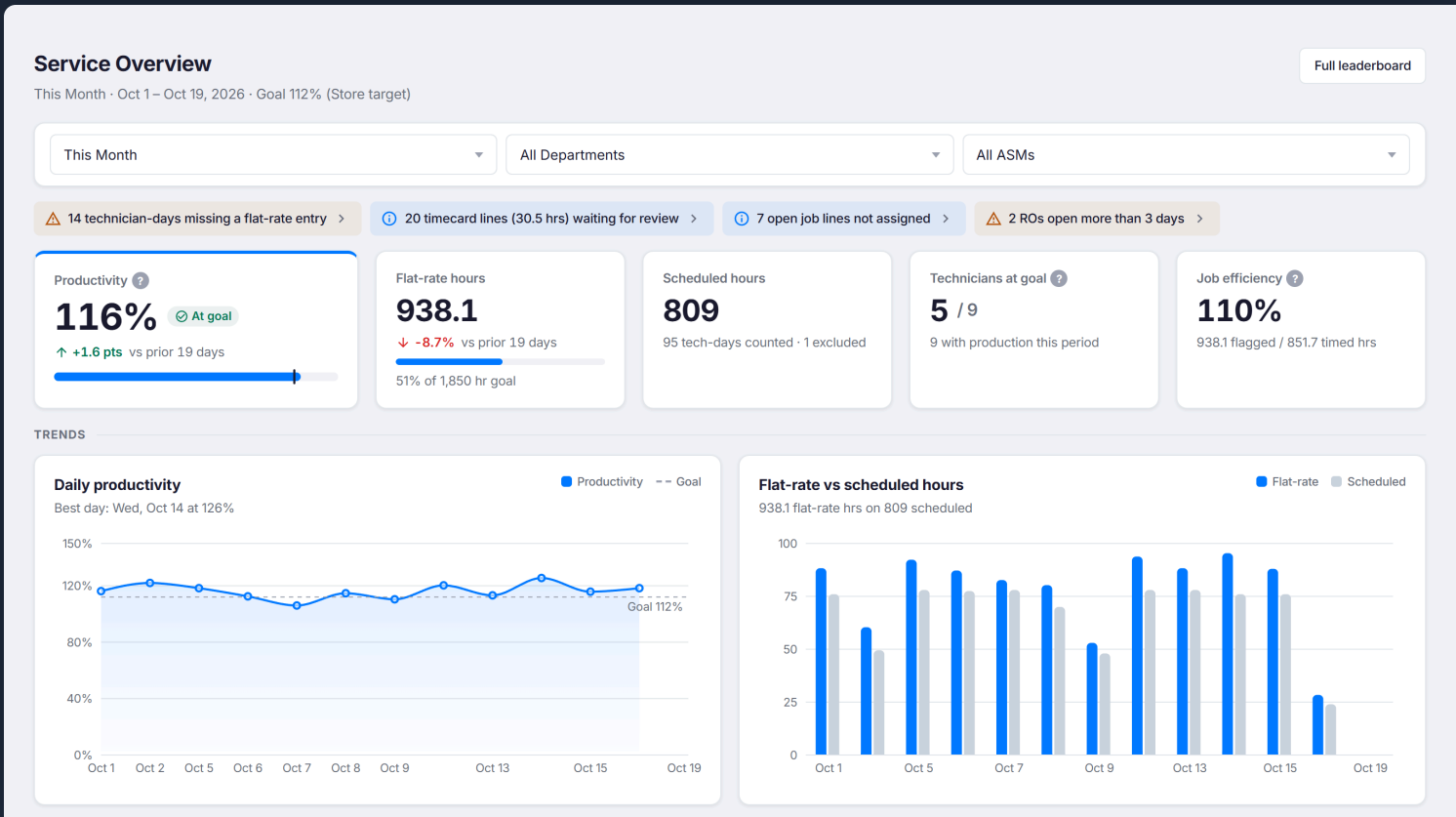
DealSync

SERVICE DEPARTMENT

Service Production Manual

How service managers, ASMs, and technicians use DealSync to track flat-rate productivity: daily entry, dispatch, timecards, verification, targets, and month-end.

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1 What Service Production Measures

Service Production tracks how many flat-rate hours each technician produces against the hours they were scheduled to work. Every number in the module, from the daily screen to the leaderboard and month-end, comes from the same calculation.

$$\text{Productivity} = \frac{\text{Flat-rate hours}}{\text{Scheduled hours}}$$

Totals are summed first, then divided. It is never an average of daily percentages.

- **Blank is not zero.** A day with no flat-rate entry is *missing* and isn't counted yet. A confirmed 0 counts as 0%.
- **Excluded days don't count against anyone.** Vacation, sick, training, and other excluding day statuses remove the day from the math entirely.
- **Hours are never counted twice.** Each store picks one source of flat-rate hours: manager daily entry or technician timecards.

Service is fully separate from sales. Service positions, permissions, and logins never change anyone's access to sales pages.

2 Who Does What

Access comes from each person's *service position*. The defaults below can be adjusted in Settings → Service → Permissions. The sales Admin position always has full service access.

Service Manager SEES EVERY TEAM	ASM LEADS A TEAM OF TECHNICIANS	Technician LOGIN OPTIONAL
Reviews the Overview and Leaderboard	Sees their own team only	Sees their own numbers only
Routes or assigns RO jobs	Assigns jobs to their technicians	Times work with the job timer
Verifies timecards	Enters daily hours and day statuses	Adds timecard lines on assigned jobs
Sets targets and closes months	Verifies or returns timecard lines	Can never enter or verify their own hours
Manages the team and settings		

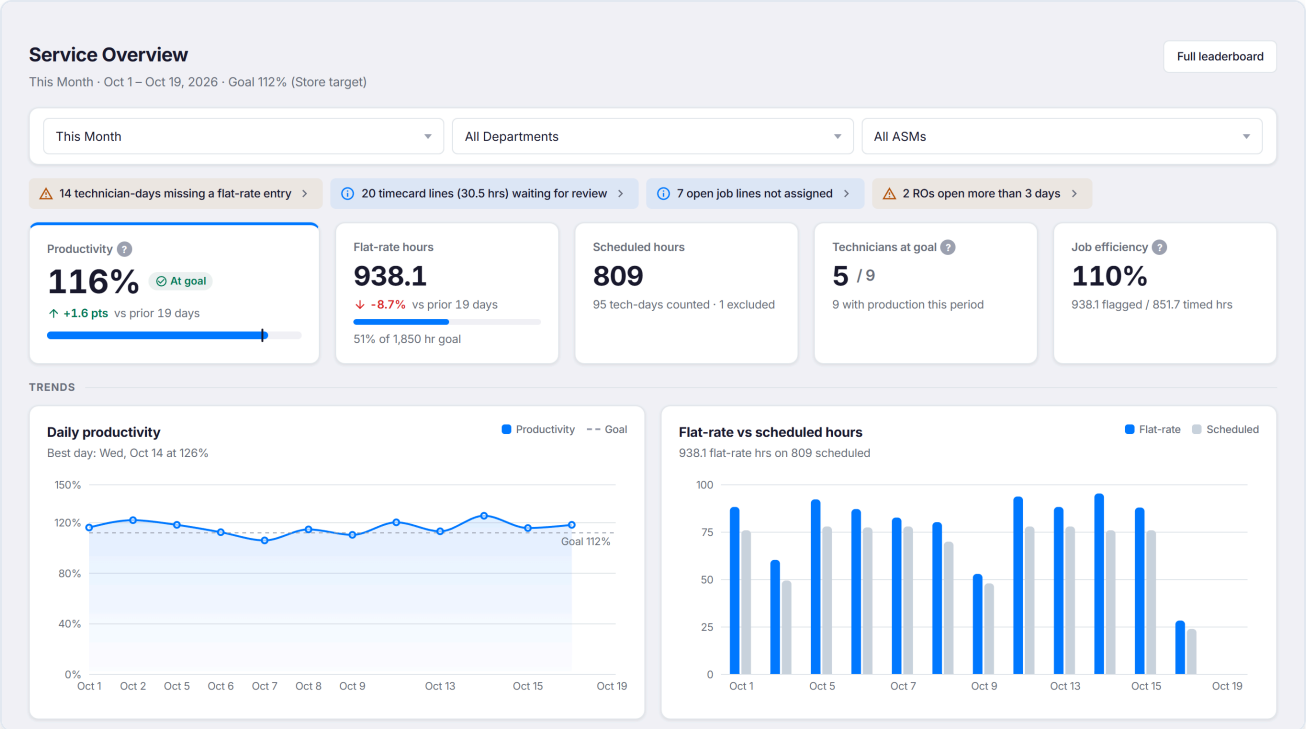
Technicians without a login have their hours entered by their ASM or the service manager. Menus only show the pages each person can use.

3 Service Overview

Service → **Overview**

The Overview is the department dashboard. Pick a time frame, department, or ASM team, and every card compares the period with the one before it.

- **Alerts** across the top link straight to the work: missing entries, lines waiting for review, and unassigned jobs.
- **KPIs** show productivity against goal, flat-rate and scheduled hours, technicians at goal, and job efficiency (verified hours ÷ time on the job timer).
- **Lower sections** break results down by technician, ASM team, department, and weekday, and show open workload on the shop floor.



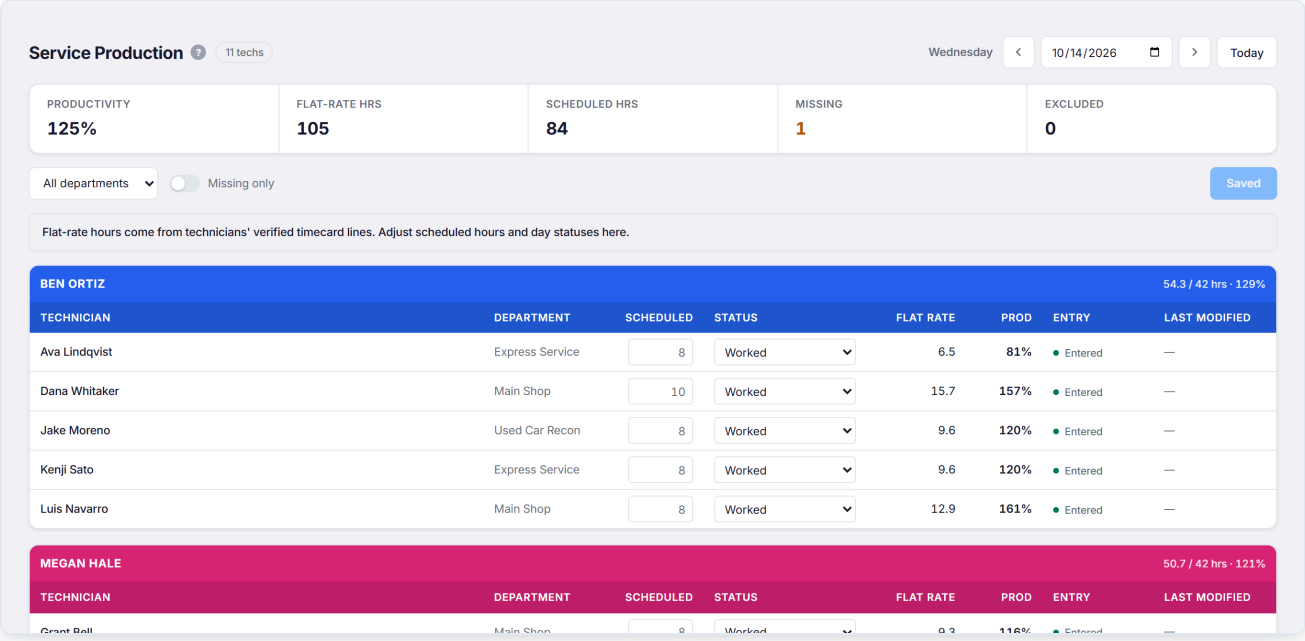
Service Overview, This Month. Sample data.

4 Daily Entry

Service → **Daily Entry**

The daily screen lists every technician, grouped by ASM, for one day. Use the arrows or date picker to move between days.

1. **Check scheduled hours.** They fill in from each technician's schedule. Change one only when the day was different, such as a half day.
2. **Set a day status** when the technician didn't work a normal day. Excluding statuses (vacation, sick, training) take the day out of productivity.
3. **Enter flat-rate hours** if your store uses manager daily entry. With timecards, this column fills from verified lines and is read-only.
4. **Save.** Press Enter or ↓ to move down a column; Ctrl+S saves.



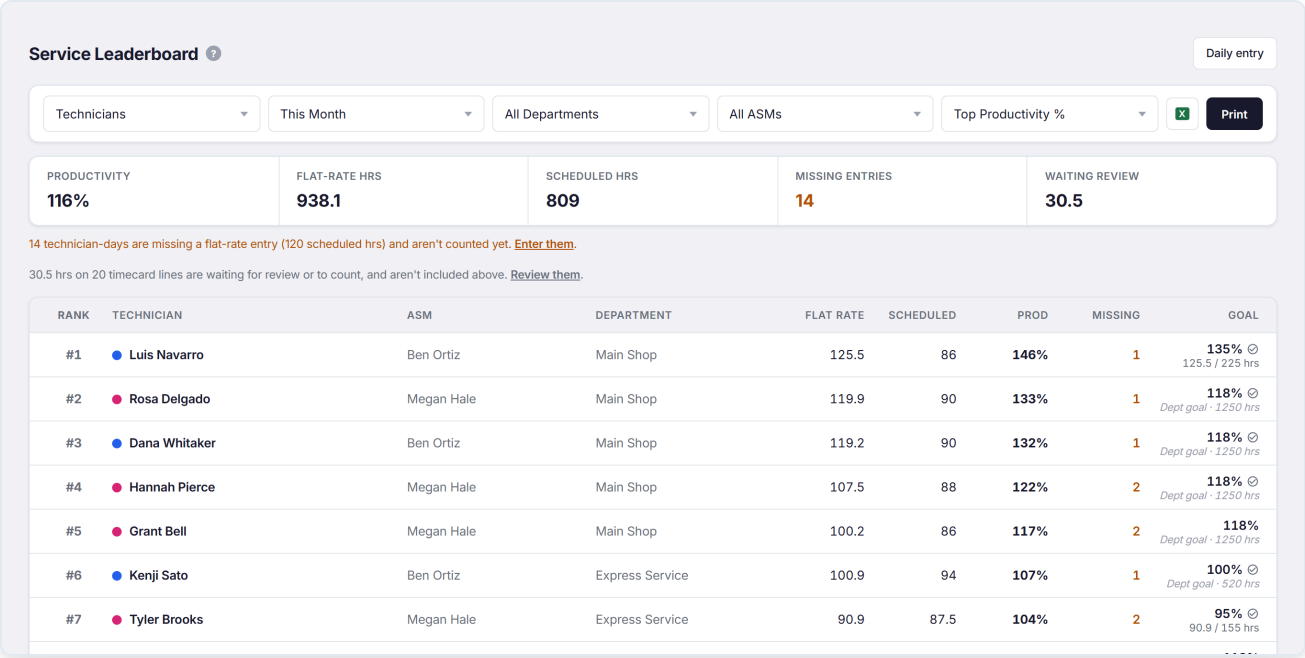
Daily Entry with technician timecards as the flat-rate source. Sample data.

Turn on “Missing only” to see just the technicians who still need an entry. Missing days show up again in the Overview, Leaderboard, and Month-end.

5 Service Leaderboard

Service → Leaderboard

Ranks technicians, or ASM teams, by productivity or flat-rate hours for any date range. Each row shows the goal that applies to that person: their own, their department's, or the store's.



Service Leaderboard, Technicians view. Sample data.

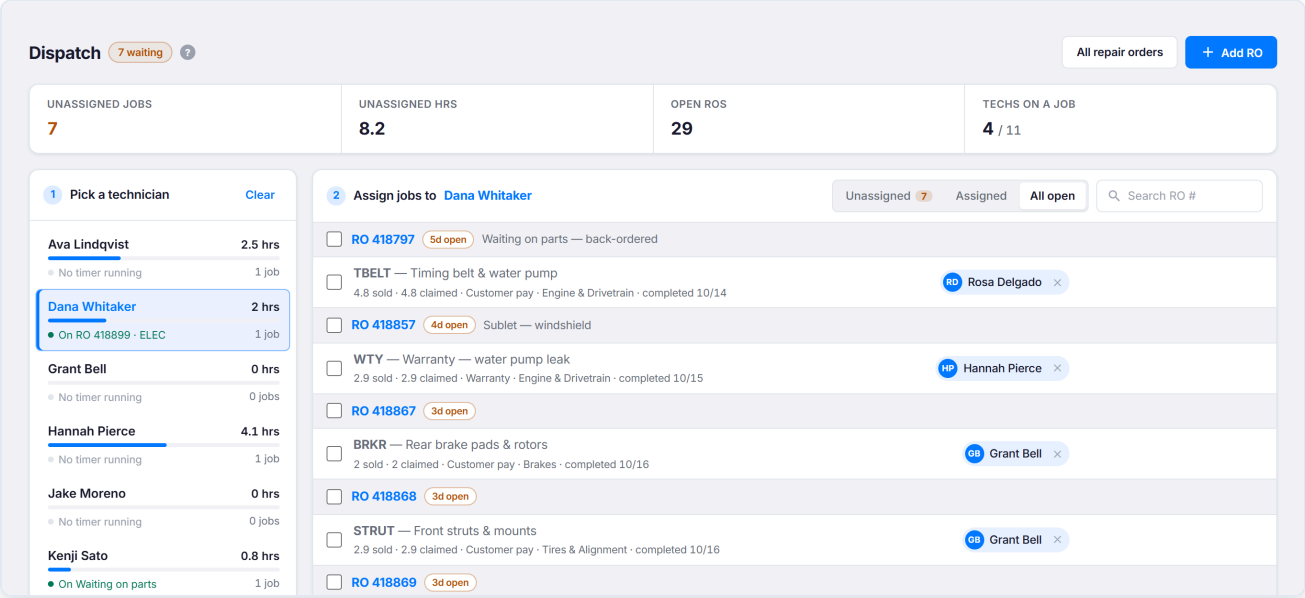
Technicians need a minimum number of scheduled hours in the period to be ranked (set in Shop Setup → Rules). Notes under the totals flag missing entries and hours still waiting for review, so the numbers are never mistaken for final. Use Print or the Excel button to share it.

6 Repair Orders & Dispatch

Service → **Dispatch** · Service → **Repair Orders**

Each repair order (RO) holds job lines: an op code, description, job type, pay type, and sold hours. Technicians can only time or claim hours on lines assigned to them, so dispatch is where work gets handed out.

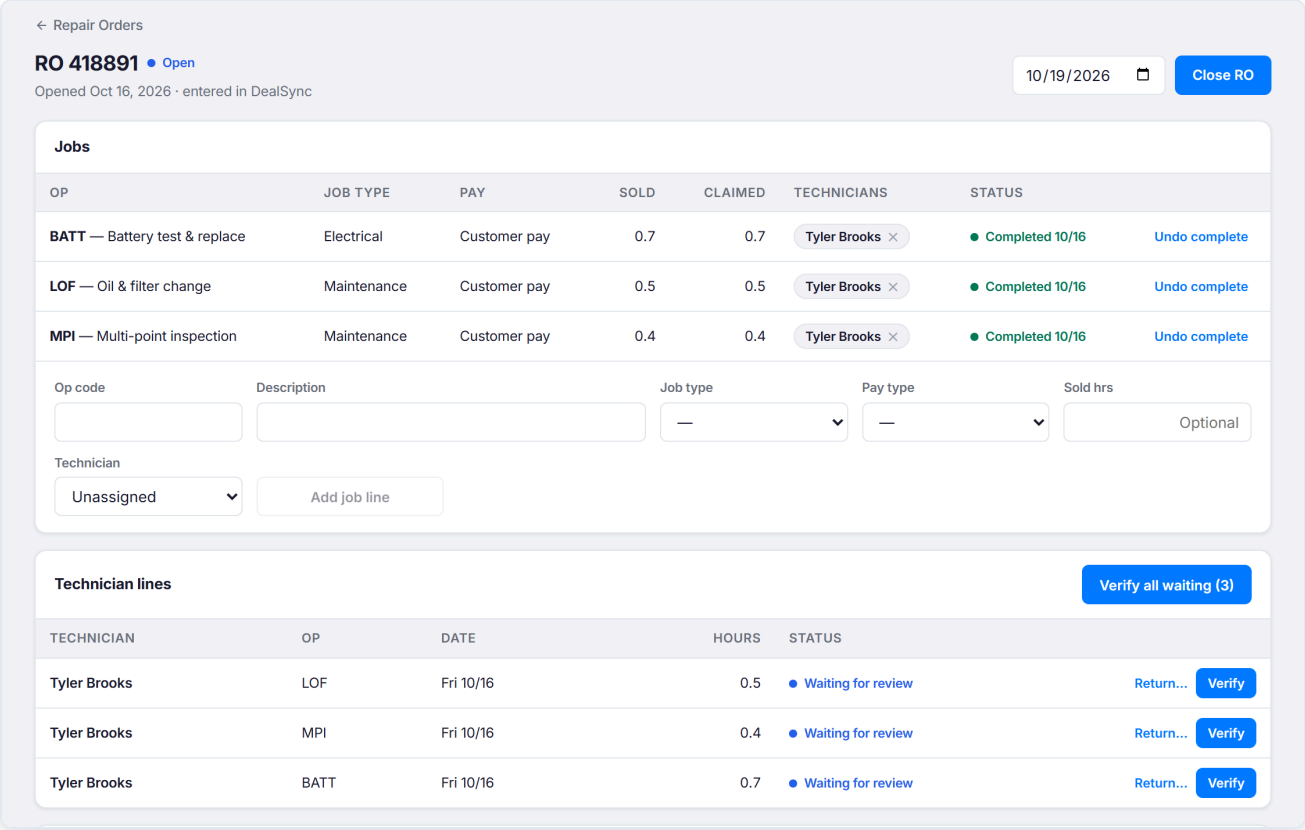
1. **Pick a technician** on the left. Their open hours and job count show how loaded they are.
2. **Assign jobs** on the right with one click, or tick several lines (or a whole RO) and assign them together. Use the Unassigned, Assigned, and All open tabs to filter.
3. **Split a job** by adding a second technician to the same line. Each technician claims their own share.



Dispatch board with a technician selected. Sample data.

On the RO page

Open any RO to add job lines, add or remove technicians, mark a job complete, close the RO, and see every technician line claimed against it. Print RO timecard produces a signed copy of one technician's lines.



Repair order detail. Sample data.

A technician can't be removed from a line while they have open claims or a running timer on it. Reassigning keeps them on.

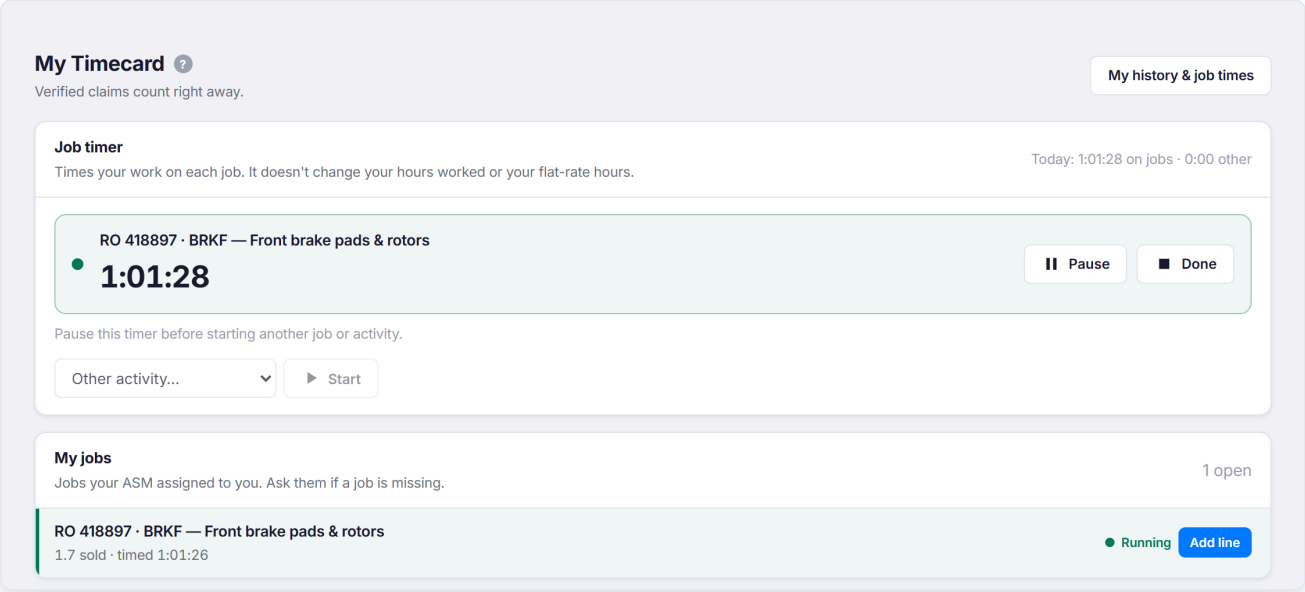
If your store routes ROs through ASMs (Settings → Service → Timecards → How ROs are dispatched), the service manager first routes each RO to an ASM, and that ASM then assigns its lines to their team.

7 My Timecard & the Job Timer

Service → **My Timecard** (technicians)

Technicians with a login record their work here. My jobs lists every line assigned to them, with sold hours, what they've claimed so far, and time on the timer.

1. **Start** the timer on a job when work begins. Pause it to switch jobs. Only one timer runs at a time.
2. **Done** stops the timer when you've finished with the job for now. Use “Other activity” to time things that aren't a job, like waiting on parts or training.
3. **Add line** to claim flat-rate hours on the job, with the work date and an optional note.
4. **Send for review.** Save draft keeps the line private until you're ready.



My Timecard, technician view. Sample data.

The job timer measures time on jobs. It doesn't change hours worked or flat-rate hours. Only a manager's verification makes a line count.

8 Verifying Timecards

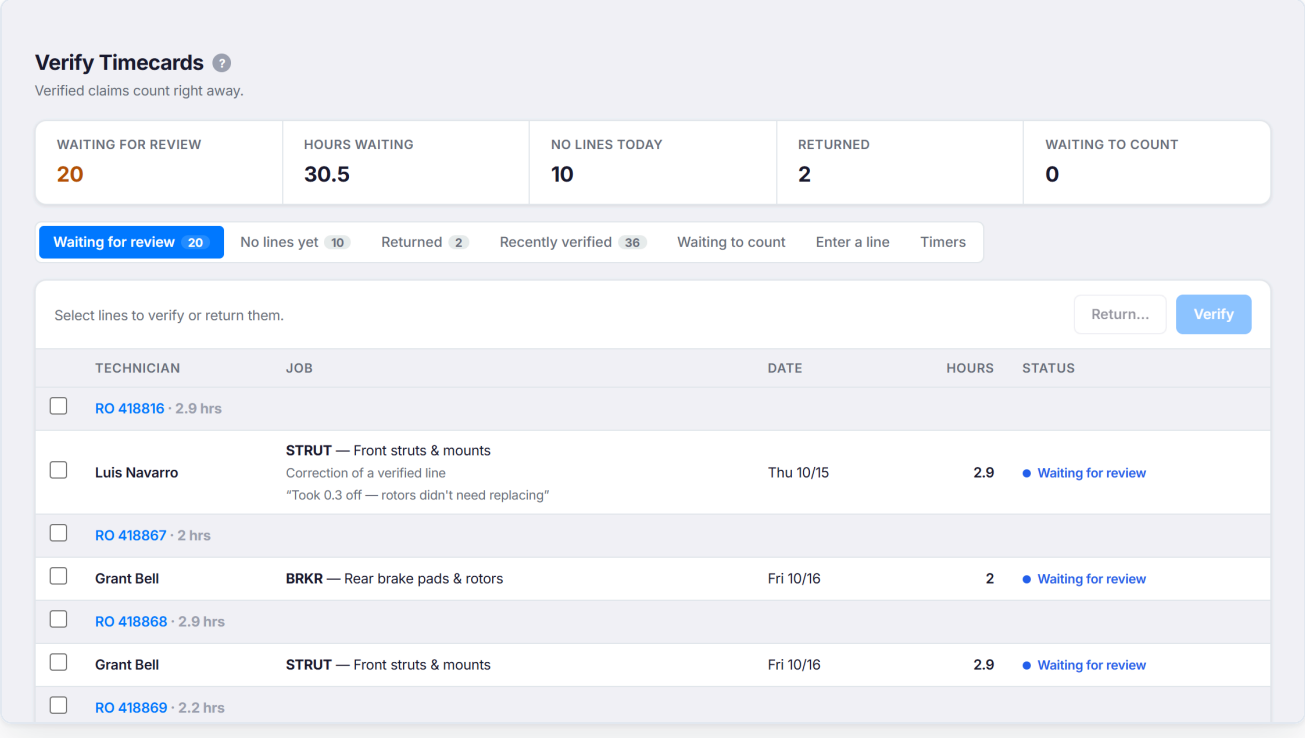
Service → **Verify Timecards**

Every technician line passes through review before it counts toward productivity.

Draft → Waiting for review → Verified → Credited

Returned sends the line back to the technician with your note. They fix it and resend.

1. **Waiting for review:** tick lines and press Verify, or Return... with a note saying what needs fixing.
2. **No lines yet:** technicians scheduled for the day who haven't added anything. Follow up before the day closes out.
3. **Enter a line** for a technician without a login. It joins the review list like any other.
4. **Timers:** correct a forgotten timer, with a reason.



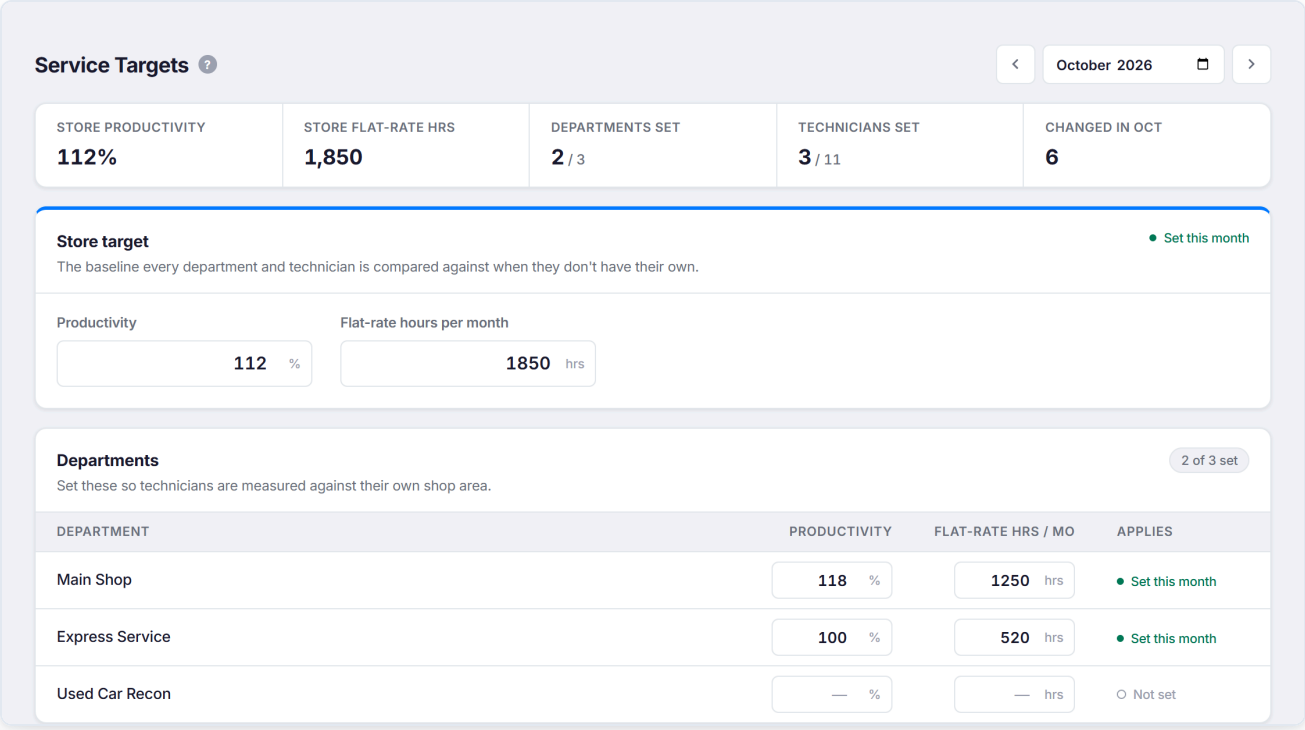
Verify Timecards. Lines are grouped by RO. Sample data.

When a verified line counts depends on the crediting policy in Shop Setup → Rules: right away, once the RO is closed, or once the job is marked complete. Lines verified but not yet counted wait in "Waiting to count." Editing a verified line sends a correction for review, and the original stays in place until the correction is verified.

9 Targets

Service → Targets

Set a monthly productivity goal and flat-rate hour goal for the store, then optionally for each department and individual technician. Anyone without their own target is measured against the next level up.



Service Targets for one month. Sample data.

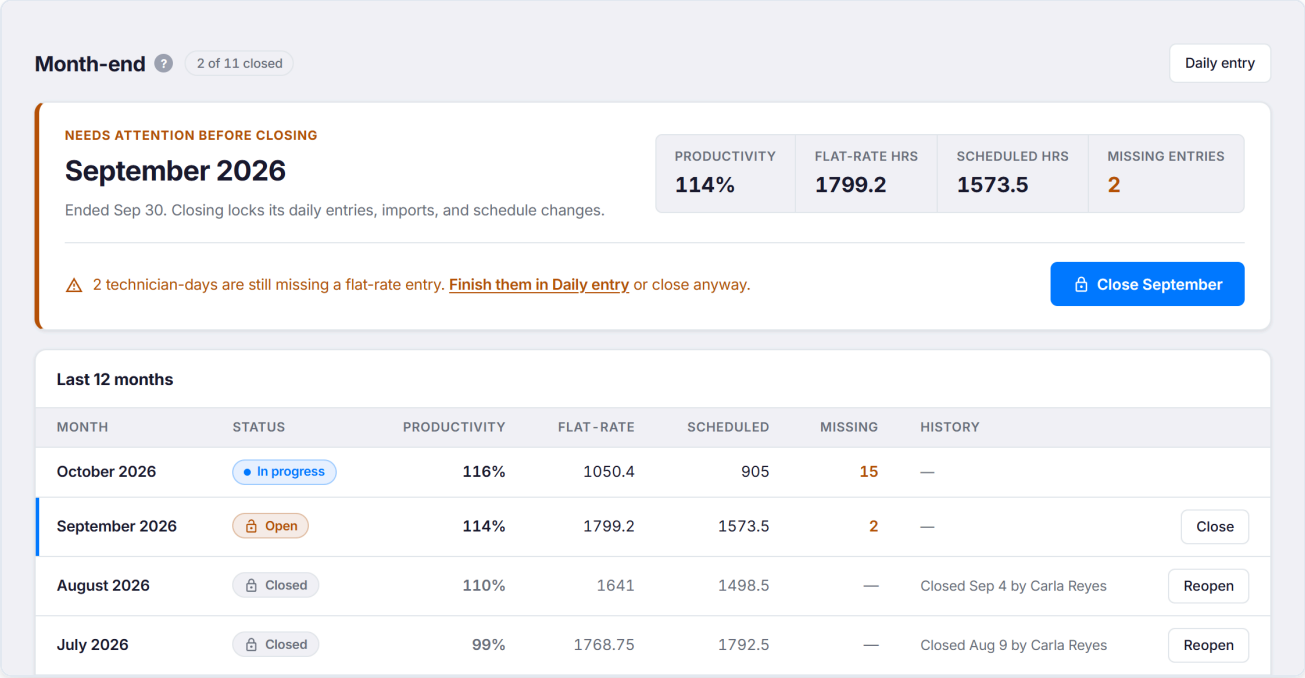
Targets carry forward month to month until changed, so you only need to revisit them when goals actually move. Use department targets to keep unlike work, such as Express and the main shop, out of misleading comparisons.

10 Month-end Close

Service → **Month-end**

Closing a month locks its numbers. Daily entries, imports, schedule changes, and assignment changes on or before a closed month are blocked until it's reopened.

1. **Clear missing entries** flagged on the card. You can close anyway, but missing days won't count.
2. **Review the totals** for productivity, flat-rate, and scheduled hours.
3. **Close the month.** Reopening requires a reason, and both are recorded in the audit log.



Month-end with the next month ready to close. Sample data.

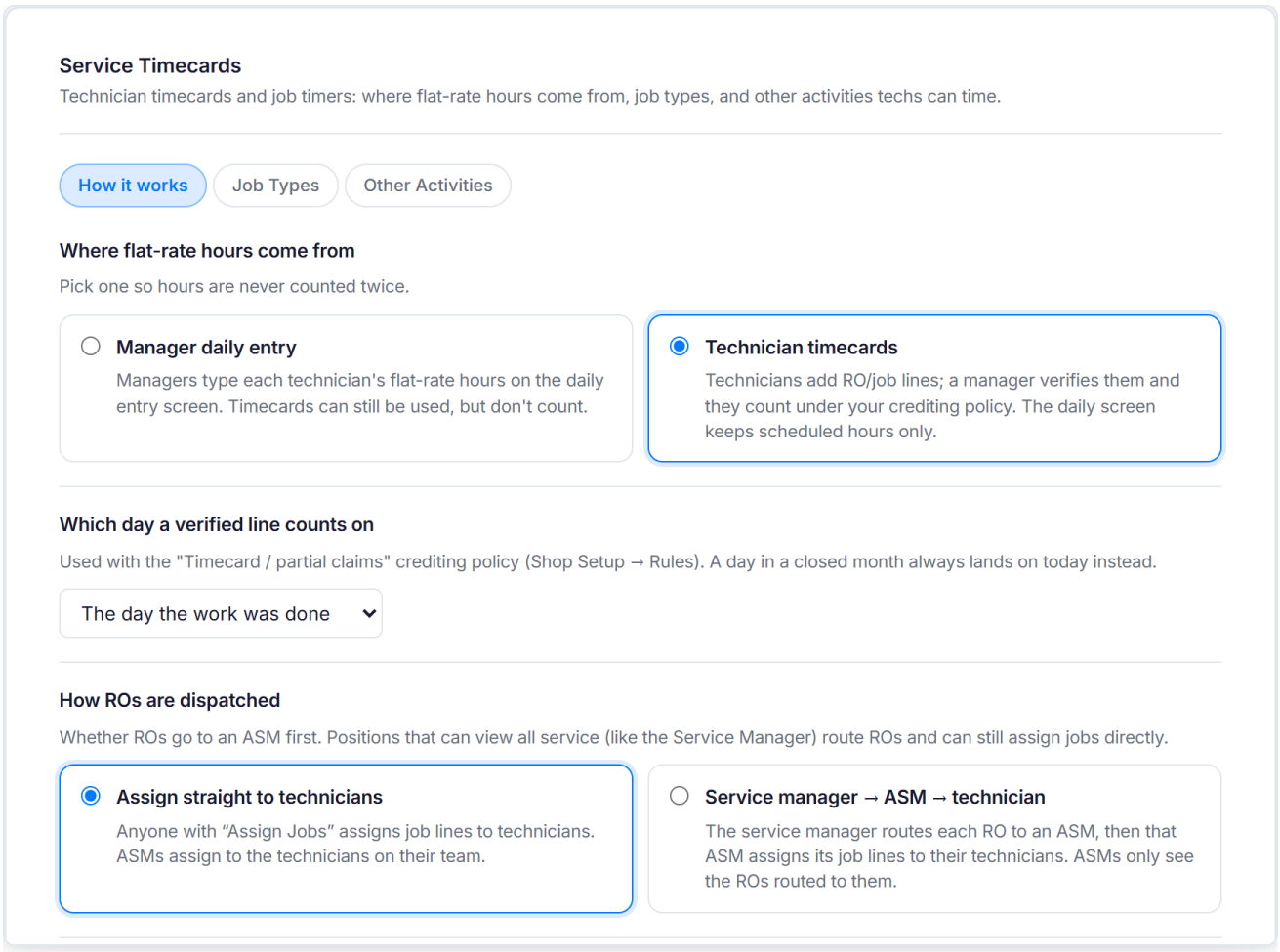
A timecard line verified after its month is closed is credited on today's date instead, so closed months never change.

11 Setting Up Service

Settings → **Service**

Service settings live in the regular Settings page under a Service heading. Set these up once, roughly in this order.

TAB	WHAT IT'S FOR
Team	Add the service manager, ASMs, and technicians. Set each technician's ASM, department, and weekly schedule, and invite anyone who needs a login. Schedules and assignments are effective-dated, and a temporary schedule hands back to the regular one when it ends.
Permissions	Service positions and what each can do: view all teams, enter hours, verify timecards, assign jobs, manage settings, close months.
Shop Setup	Departments, day statuses (and whether each one excludes the day), the crediting policy, and the leaderboard minimum.
Timecards	Where flat-rate hours come from, which day a verified line counts on, how ROs are dispatched, who assigns jobs, and when to flag a forgotten timer. Also job types and other activities.
Import	Bring in past production from a spreadsheet so trends and comparisons start with history.



Settings → Service → Timecards: where flat-rate hours come from and how ROs are dispatched.

Pick one flat-rate source and stick with it. Switching applies from that point forward; hours already entered or credited stay as they are.

12 Daily Routines

A few minutes a day keeps the numbers current, so the Overview reflects today rather than last week.

Technician

- [ ] Start the timer when you begin a job
- [ ] Pause when you switch jobs
- [ ] Add a line for each job worked
- [ ] Send lines for review before you leave
- [ ] Fix anything returned

ASM

- [ ] Assign new jobs on Dispatch
- [ ] Verify or return waiting lines
- [ ] Check “No lines yet” for your team
- [ ] Set day statuses for time off
- [ ] Clear missing entries on Daily Entry

Service Manager

- [ ] Check Overview alerts
- [ ] Route new ROs (if using ASM routing)
- [ ] Review the watch list and leaderboard
- [ ] Confirm unassigned work is moving
- [ ] Close last month once it's complete

13 Quick Definitions

Flat-rate hours
Hours paid for the work, from daily entry or verified timecard lines.

Scheduled hours
Hours the technician was scheduled to work that day.

Productivity
Total flat-rate hours ÷ total scheduled hours.

Job efficiency
Verified flat-rate hours ÷ time on the job timer.

Missing
A scheduled day with no flat-rate entry. Not counted until entered.

Excluded day
A day status that removes the day from productivity.

ASM
Assistant Service Manager; leads a team of technicians.

Job line
One operation on an RO: op code, description, sold hours.

Claim / line
A technician's flat-rate hours on one job line.

Credited
A verified line that now counts toward productivity.

Returned
Sent back to the technician to fix and resend.

Closed month
Locked month; changes require reopening with a reason.