

# Sales Analysis - Workbook & Software Directions

**Welcome !** The workbook that you're about to utilize is not designed to sell you on the fact that Maintenance and Menu packages can be profitable tools for marketing your services and products. It's intent is to help you properly Design, Cost and Track the results of Individuals Maintenance and Menu Sales Packages implemented within your organization.

This software package is also intended to help you as a user overcome what we have learn to be the most difficult process of establishing and maintaining active sales packages. With ease the spreadsheets within this workbook will be able to Set Individual Sales Goals and Forecast Projected Gross Profit for both Labor Sales & Parts Sales.

## Knowing that Individuals are not fond of directions - Lets get Started !

Remember; IntactAuto® wants to simplify the process of establishing profitable menu packages and your questions are always welcomed.

### Worksheets & Analysis Reports Available within this Workbook:

#### **Mechanical Labor & Parts Sales**

Both Month-to-Date & Year-to-Date, by Store and Individual

#### **Comparison Reports**

Actual Sales compared to Forecasted Values, by Store and Individual

#### **Maintenance & Menu Package Design**

Design, Costing and Sales Analysis of individual Menu Packages

#### **Forecasting and Actual Unit Sales**

Seasonally adjustable Gross Profit & Sales per Package & Individual

#### **And Much More .....**

**Customized Reporting, Graphing and Branding available upon request.**

## Getting Started:

Unique Excel® programming features have been implemented to simplify the usage of these spreadsheets, such as Forms buttons, Menu Driven worksheet access, Macro programming, and much more. You will find that you **never** have to locate a worksheet, click on a worksheet Tab (not visible), enter a formula or modify this program design.

Simply enter your data in the **Yellow Cells when utilizing this workbook and remember Only Yellow cells allow an entry.**

Our research indicates that the experienced Excel® user thinks to hard, let the computer and the workbook do the work for you.

### 1). Starting Point: Set-up the Workbook Default Setting (Mandatory Starting Point - Accessed by using forms button on Main Menu)

#### Enter the following information;

- A). **Business or Dealership Name** - Enter the organizations name that you would like to populate all reports & screen headings.
- B). **Workbook Start Date** - This doesn't necessary mean the date you start using the workbook, it is the date that begins your 12 month reporting cycle. For example let's say you want it to be the current calendar year, you would enter, 01 / 01 / 20## or let's say you want it to be the next 12 months you would enter, ## / 01 / 20##. (Do not enter # signs, enter dates)
- C). **Service Consultant Names** - Enter up to 12 Service Consultant names you would like to track & generate reports on within this workbook. These vital reports include; Monthly & Yearly Sale Values needed to determine Gross Profit, Unit Sales, Total Sales, and Sales Effectiveness (their ability to meet goals and project sales values).  
If utilizing this workbook solely for the Package Costing and Design feature simply leave the default names in place. You may also clear the cells that are not needed or just leave the system default values intact.
- D). **Start Date for each Service Consultant** - This date value is used to calculate Average Monthly Sales and may be required for customized reports. See the comment box for more details.
- E). **Select your currently Active Month** - This routine set the default month upon entering the workbook, eliminating the keystrokes of selecting the currently active month and worksheets. See the comment box for more details.
- F). **Worksheet Protection Measures** - This is not a require entry-selection during Set-up, but a workbook feature that you will want to consider using after establishing your Sales-Menu Packages. By clicking this forms button, On or Off it prevents the you the user from overtyping data in error on the Package Sales Worksheet. See the comment box for more details.

**As you have noticed by now, references are made to comment boxes. Review them as you use this program. They are useful and designed to provide you with in-depth detail, helping reduces the need for an excessive amount of directions.**

## 2). Maintenance & Menu Packages: Inputting & Designing: Calculating Cost, Gross Profit and Forecasting

Accessed by using forms button on Main Menu labeled - Establish Menu Programs

As previously mentioned this workbook may be **solely** used as a tool to help you Design, Cost and Forecast Gross Profit and Sales on Individual Maintenance and Menu Packages with the end result being all packages combined as a whole providing valuable Month-to-Date and Year-to-Date Sales values.

It is suggested that when you first begin using this workbook that you start-off slow. Simply enter 2 or 3 individual Menu Packages then click through the complete Excel© program and see exactly how your entries are influencing all the reporting features of this program. This process will in turn help you determine how you would like your remaining package detail to appear throughout your program and help you identify any input errors prior to entering the remaining sales packages.

### Enter the following information;

- A). **Sales Package Description** - Enter a Name or Description for each individual Menu Package you offer or are considering.
- B). **Service Operation Code** - Enter your desired operation code for easy cross referencing or leave blank. **Not** a required entry.
- C). **Menu Package Identification #** - Enter a package # for easy cross referencing if you bundle items. **Not** a required entry.

### Package Cost Structure

- D). **Package - Parts Cost** - Either enter the Total Cost of all Parts or enter the Total Cost of Bundled Parts as a package.
- E). **Additional Parts Cost** - Enter the Total Cost of additional Parts sold with each Sales Package.

Do **not** include parts cost already accounted for in the Package - Parts Cost value

- F). **Flat Rate Hours Sold Per** - Enter within this cell the Total Labor Hours Sold (Technician Flagged/Paid Time).  
Do **not** confuse this with your Sale Price or Billing Hours. The Labor Selling Price is determined upon entering a desired Effective Labor Rate.

- G). **Average Hourly Cost of Labor** - Enter an approximate Average Hourly Rate Paid Technicians for work performed.  
This Average Hourly Rate will be used to approximate your Labor cost for all Maintenance & Menu Packages sold.

### Retail Service Pricing

- H). **Package - Parts Retail Price** - Enter the Retail Selling Price of the Package - Parts only.  
The Parts Profit Margin % and Gross Profit will automatically calculate on the worksheet below.
- I). **Additional Parts Retail** - If Selling parts in addition to the Bundled Parts Package, enter the Retail Selling Price for those parts.  
Additional Parts and Bundled Parts Packages are combined when calculating Total Parts Profit Margin % and Gross Profit.

### Profit Margins - Parts & ELR

- J). **Effective Labor Rate per Item** - Enter your desired Effective Labor Rate for each Flat Rate Hour Sold.  
The Retail Labor Selling Price and Gross Profit will automatically calculate for you on this worksheet.

**Special Note:** An added safety precaution does exist for protecting Maintenance - Menu Package designs from **unintentionally** being changed. A forms button on the Default Settings worksheet may be clicked at anytime enabling or disabling the ability to modify package designs. It is **strongly suggested** that you **protect your package designs** at all times until you consider or make changes.

You have now **Successfully Completed** your first step to designing and implementing a **Profitable Maintenance - Menu Package**. If upon reviewing the **Retail Sales - Total Price** an adjustment is needed, modify either the Retail Parts Price or the Effective Labor Rate.

### Currently Available Calculated Values

Parts Gross Profit	Parts Margin %
Labor Gross Profit	Effective Labor Rate
Total Gross Profit	Total Menu Package Cost

**Customized Program Announcement:** Due to the success and profitability of Maintenance & Menu Marketing Packages offered by many organizations. IntactAuto® is making available at a nominal upgrade fee the ability to expanded your workbook. **You can now manage up to 32 Maintenance & Menu Packages** and enjoy even greater design, tracking and analysis capabilities. Contact IntactAuto Support for additional information.

## 3). Forecasted Monthly and Yearly Gross Profit - Labor & Parts Sales Analysis

Accessed by using forms button on the Package Design Worksheet - Establish Menu Programs

As previously mentioned this workbook will assist you with forecasting Gross Profit & Sales for each individual Maintenance Package over a 12 month period. It will also allow you to establish unit sales goals for each Service Consultant tracked within this workbook. This is done simply by clicking on the '**Enter Forecasted Sales Routine**' forms button on the Package Design worksheet and entering the number of package unit sales that you believe are sellable within each given month.

The forecasting worksheet displays projected unit sales counts by quarters and allows you to toggle between quarters by clicking on the forms buttons at the top right of the worksheet that read, '**1st, 2nd, 3rd, & 4th Quarter**' and enter your individual forecasted values.

Setting up an original forecast may be tedious at first but it does allow you to **adjust your forecasted sales counts based on seasonal factors and service business cycles**. It will also in turn adjust on a monthly basis the projected unit sales goals for each active Service Consultant.

### Forecasting Shortcuts;

As mentioned this workbook may be solely used as a tool to help you with Designing, Costing and Forecasting Gross Profit and Sales on Individual Maintenance and Menu Packages. If utilizing this software solely for Package Design, Costing & Forecasting, input projected units sales within the Service Consultant Name (1) position only for each Active month.

You'll also notice on the worksheet, forms buttons labeled, '**Zero Values**' and '**Quick Copy**'. These 2 forms buttons assist you in speeding up the setup process by allowing you to click the '**Quick Copy**' button which copies the first months forecasted values within a quarter to the remaining two months within that quarter. The '**Zero Value**' forms button will zero out all entries made within that quarter for all Service Consultants.

**Additional Forecasting Setup comments boxes are available on the worksheet. Review them as you use this program. They are useful and provide additional in-depth details, explaining many added program features not mentioned here.**

Your Customized Software Package is Now Fully Functional .....

## Frequently Asked Questions

### How do I use this spreadsheet?

Its a known fact, individuals do not like reading directions, but an extensive amount of time developing instructions and creating comment boxes throughout this program has been done, please read them.

If they don't answer your question it's our fault. E-mail or Call IntactAuto Support immediately for an answer to your question.

### Where are the Excel Worksheet Tabs?

This program has built into it an extensive amount of "Forms Buttons" which can be utilized within an Excel® workbook. You will never need to locate a worksheet by utilizing a Tab, access to all worksheets or reports is done by **clicking on a forms button**.

### Why when I try to make an entry within a cell do I keep getting the message that the cell is protected?

To simplify the usage of these spreadsheets color coding is incorporated within these worksheets. **ONLY** cells **Yellow in Color** allow an input entry and occasionally these cells may turn **Red** if an error entry occurs, these are the only cells that allow an entry.

All remaining cells are Protected-Locked due to being calculation cells or general information cells.

### How do I Print Reports within this workbook?

Each individual Report-Worksheet does have a "**Print Report**" forms button, at anytime you can click and print a preformatted report.

### I don't get it, can I get help with setup?

**Of Course !!** Once familiar with this Software Package you'll be saying to yourself, "This is the simplest Excel® spreadsheet I've ever used.". Please e-mail or simply call with any questions you may have concerning this software package.

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