

QuickTouch: Employee Management

QuickTouch provides a time clock function and security settings for all employees. In addition, you can track employee sales statistics and commission through several different reports.

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Employee Maintenance

Employee Selection Page

Employee Maintenance allows you to add or remove Employees. From the Main Menu, choose Employee Management, Employee Maintenance.

You will be prompted with a list of your Employees. Choose the appropriate Employee.

Note the “Add” button on this screen that will allow you to add a new employee to the list.

Also note the “Page 1 of X” indicator. If there is more than one page of employees, you can use the “Forward” and “Back” buttons to scroll through the screens.



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Each employee requires a Code, a Password, and must be assigned to a Security Group. The Code/Password/Security Group combination are used for the employee security functions, and this same employee record also tracks time clock information. Thus, even if an employee will not be using the computer (a lower bay technician perhaps), he still needs to be assigned a Code and Security Group.

If you wish to delete an employee, press the green DELETE button at the top of the screen.

Employee Name Required.

Address Optional.

Zip code, City, State Optional.

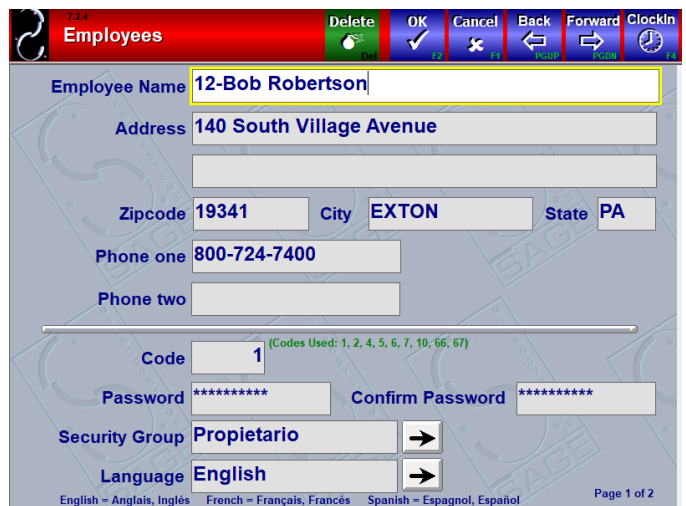
Phone Optional.

Code Required. This is a number up to four digits in length. Note that the code is unique for that employee and cannot be used again. *You can see the list of “Codes Used” next to the Code field.*

Password Required. It can be any combination of letters or numbers and is not case sensitive. It should be short enough for the employee to easily type and remember, but not so short that others can guess it. The password, regardless of length, will be masked with 10 asterisks. The Confirm Password box is used to verify the password and to avoid mistakes.

Security Group Required. Assign the employee to the appropriate Security Group.

Language QuickTouch supports multiple languages, which so far are English, Spanish, and French. Thus, when an



employee uses his Code/Password to log onto the system, he will see the menus in the appropriate language. Contact Sage Support to enable this feature.

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Social Security Number Optional.

Date of Hire Required. Defaults to the current date when adding a new employee.

Last Rate Change Date Required. Defaults to the current date when adding a new employee.

Date of Termination Optional.

Regular Pay Rate Optional. These numbers will affect the Daily Statistics.

Overtime Pay Rate Optional. These numbers will affect the Daily Statistics.

Overtime By Required. Most municipalities require a standard 40-hour work week, over which employees receive at least a time-and-a-half pay rate. Other municipalities might require an 8-hour day, and some might require both. Choose the appropriate Overtime period, which most often would be a 40-hour workweek period.

The screenshot shows the 'Employees' form in Sage HRM. The form is titled 'Employees' and has a red header bar. Below the header, there are navigation buttons: Delete, OK, Cancel, Back, Forward, and ClockIn. The form fields are as follows:

- Employee Name: 12-Bob Robertson
- Address: 140 South Village Avenue
- Zipcode: 19341, City: EXTON, State: PA
- Phone one: 800-724-7400
- Phone two: (empty)
- Code: 1 (Codes Used: 1, 2, 4, 5, 6, 7, 10, 66, 67)
- Password: *****
- Confirm Password: *****
- Security Group: Propietario
- Language: English

At the bottom of the form, there are language options: English = Anglais, Inglés; French = Français, Francés; Spanish = Espagnol, Español. The page number 'Page 1 of 2' is also visible.

Security Groups

Security Group Maintenance allows you to add or remove Security Groups. Assigning an employee to a particular security group allows him access only to the areas of QuickTouch that you approved and selected. Additional security options are found in System Management, General Setup, Security Setup.

Security Group Selection Page

From the Main Menu, choose Employee Management, Security Group Maintenance. You will be prompted with a list of Security Groups to select from.

Note the “Add” button on this screen that will allow you to add a new Security Group to the list.

Also note the “Page 1 of X” indicator. If there is more than one page of Security Groups, you can use the “Forward” and “Back” buttons to scroll through the screens.



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If you wish to delete a Security Group, press the green DELETE button at the top of the screen.

When editing a Security Group, press OK to save any changes, or CANCEL to quit without saving changes.

Security Group Required. Type in a name for the group.

Security Level Choose the appropriate security level (0 being the highest) according to your setup.

Description Type in a brief description of the group.

Main Menu Every screen in QuickTouch is represented by a button here, and you can Allow or Deny access to any screen. To allow a group access to a particular screen, press the associated button to make it green. To deny access, press the button so that it turns red.

Because QuickTouch is menu-based, if you want to allow access to a particular screen, its higher-level menu item must also be allowed. Example, if you want to allow the Cashier group to conduct a Pay-In, then you need to also allow access to the Cash Register Functions menu.

Scroll all the way to the bottom of the list to view several point-of-sale security options. These include:

- **Bay Delete** (to delete a car from the bay screen).
- **Fleet Credit Limit Override** (to allow a fleet charge even if that fleet is over the credit limit).
- **Loyalty Reward Maintenance** In Customer Maintenance.



Employee Clock In/Out

Employee Clock In/Out allows you to clock employees in or out of the time clock feature

Security Group Selection Page

You can reach this feature from almost any screen or menu in QuickTouch, by pressing the "ClockIn – F4" button at the top right.

You will be presented with a list of all employees, and their current time clock status (In or Out).

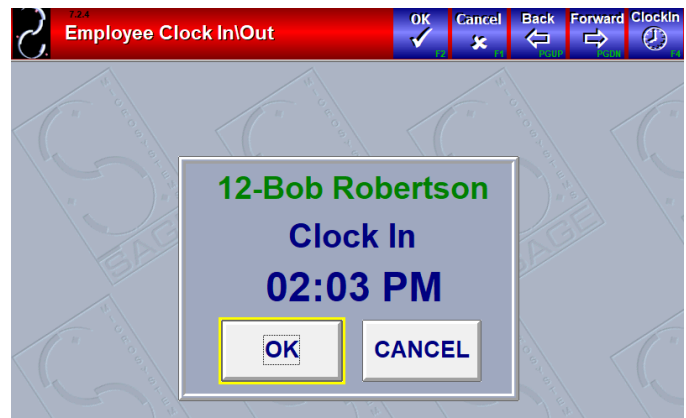
This screen is security-enabled, so if a technician is assigned to a security group that does not have access to this screen, he will be denied access.

Pressing a name will allow you to change the clock status.



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Press OK to clock in or out the employee.



Time Clock Adjustments

Time Clock Adjustments allows you to modify, add, or delete time clock entries.

Security Group Selection Page

From the Main Menu, choose Employee Management, Time Clock Adjustments.

You will be prompted with a list of your employees. Choose the appropriate employee. You will be asked to enter the date of the timecard you wish to modify.

Press OK after entering the date to clock in or out the employee.



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Note that in this example, the first entry is an existing entry. You can modify either the In or Out times.

The second entry in this example is an Active entry. You can modify the In time only.

On a blank line you can add an entry, but you need the In and Out times as well as the Date Out date. Thus, you can only add an entry for a period when the employee already clocked out. If you are trying to add a new period for when the employee is still clocked in, first clock in the employee, and then come back to the Adjustments screen to modify the In time



Employee Reporting

Employee Profile

Lists all personal information about the employee, as well as pay rates, Quarter-to-Date and Year-to-Date Gross Earnings.

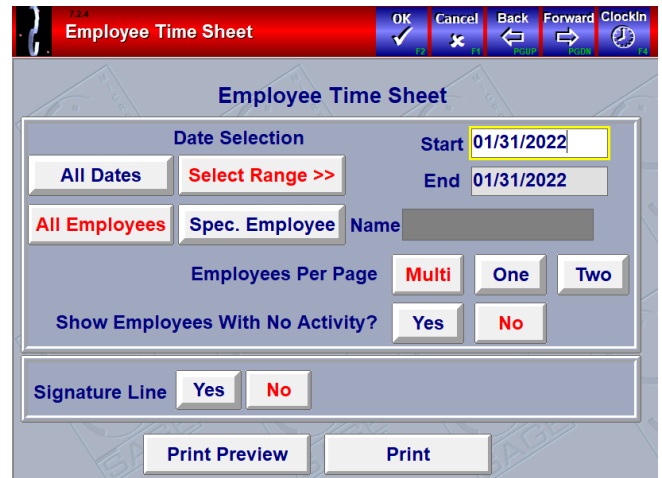
You can print the report for all employees or for a single employee. Use this report whenever detailed personal employee information is needed, such as for insurance forms or W2 information.



Employee Time Sheet

Lists for each employee the dates and times worked, total hours worked for each day, and the total hours worked in the period.

You can print the report for all employees or for a single employee. You can choose any date range. Print this report using the "One Employee Per Page" and "Print Signature Line" options, and review the hours worked with each individual employee before you write your paychecks. Have the employee sign the worksheet so that you know that the hours worked is correct in the system. This will help ensure that paychecks will be correct the first time.



Employee Earnings

Lists each employee, Social Security number, Pay Rates for Regular and Overtime hours, and Regular and Overtime Hours Worked.

You can print the report for all employees or for a single employee. You can choose any date range. It multiplies the hours worked and the appropriate pay rate to calculate total earnings for the pay period. Use this report to calculate payroll, but note that QuickTouch cannot calculate taxes or withholdings, you will need an accounting program such as QuickBooks, or an outside payroll company to do this.



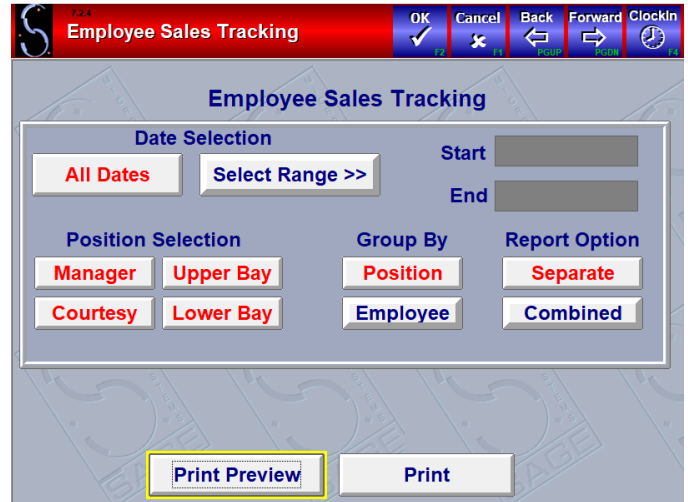
Employee Sales Tracking

When printing an invoice, the Recommendations screen allows you to assign four employees to that invoice, in the positions of Manager, Courtesy Technician, Upper Bay, and Lower Bay Technicians. This report will list for each employee, the position that he worked and what services were sold on invoices while he was in that position.

You can choose any date range. Note that the services listed were not necessarily performed by the technician, just that the service was performed on the vehicle while he was in that position (a Lower Bay technician would not necessarily install an air filter).

Use this report for calculating commissions or to compare up sells between your various employees. Note that only SERVICES are listed on this report, not parts, so your employees need to make sure that they are not using the "Parts" button on the blue invoicing screen when selling services for anything that needs to be listed here. Employee Service Each Service can be configured to prompt for two employees who performed that service. These employees can be different than the four positions listed on the invoice. You can print the report for all employees or for a single employee.

You can choose any date range. The report will list for each employee, which position was worked (Worker 1 or Worker 2) and which services were performed while under that position. For each service, it will also list the number performed, the dollar amount, the number performed per 8hr shift, and the average number performed per hour. Use this report to calculate commissions for specific services.



Time Clock Audit

Records all Time Clock activity for the selected date range including any adjustments that were made.



Bi-Weekly Time Sheet Summary

This report shows the time sheet data for shops that utilize a bi-weekly payroll schedule. The format of this report coincides with the Pay Period End Day that is selected in Week End Setup (see page 165).

The screenshot shows the 'Bi-Weekly Timesheet' application window. At the top, there is a red header bar with the text 'Bi-Weekly Timesheet' and a navigation menu containing 'OK', 'Cancel', 'Back', 'Forward', and 'ClockIn' buttons. Below the header, the title 'Bi-Weekly Timesheet' is displayed in blue. The main content area is a light blue box with the text 'Enter Date' followed by a text input field containing '1/31/2022'. At the bottom of the window, there are two buttons: 'Print Preview' (highlighted with a yellow border) and 'Print'.

Employee Productivity

Displays the # of Cars, % of Cars, and the Ticket Average for each Position as well as a total Ticket Average by employee.

The screenshot shows the 'Employee Productivity' application window. At the top, there is a red header bar with the text 'Employee Productivity' and a navigation menu containing 'OK', 'Cancel', 'Back', 'Forward', and 'ClockIn' buttons. Below the header, the title 'Employee Productivity' is displayed in blue. The main content area is a light blue box with a 'Date Selection' section containing 'All Dates' and 'Select Range >>' buttons, and a 'Spec. Employee Name' section containing 'All Employees' and 'Spec. Employee Name' buttons. To the right of these sections are 'Start' and 'End' text input fields. At the bottom of the window, there are two buttons: 'Print Preview' (highlighted with a yellow border) and 'Print'.

Employee Reactivation

The Employee Reactivation feature allows a previously deleted employee to be restored into the system. This function is useful for former employees that have returned to the business.

Note: When an employee is deleted from QuickTouch, it's still stored in the database for historical reporting purposes.

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From the Main Menu, choose Employee Management, Employee Reactivation.

Select the checkbox for the employee to be reactivated, and then click OK.

