



The
DataLynx
Online

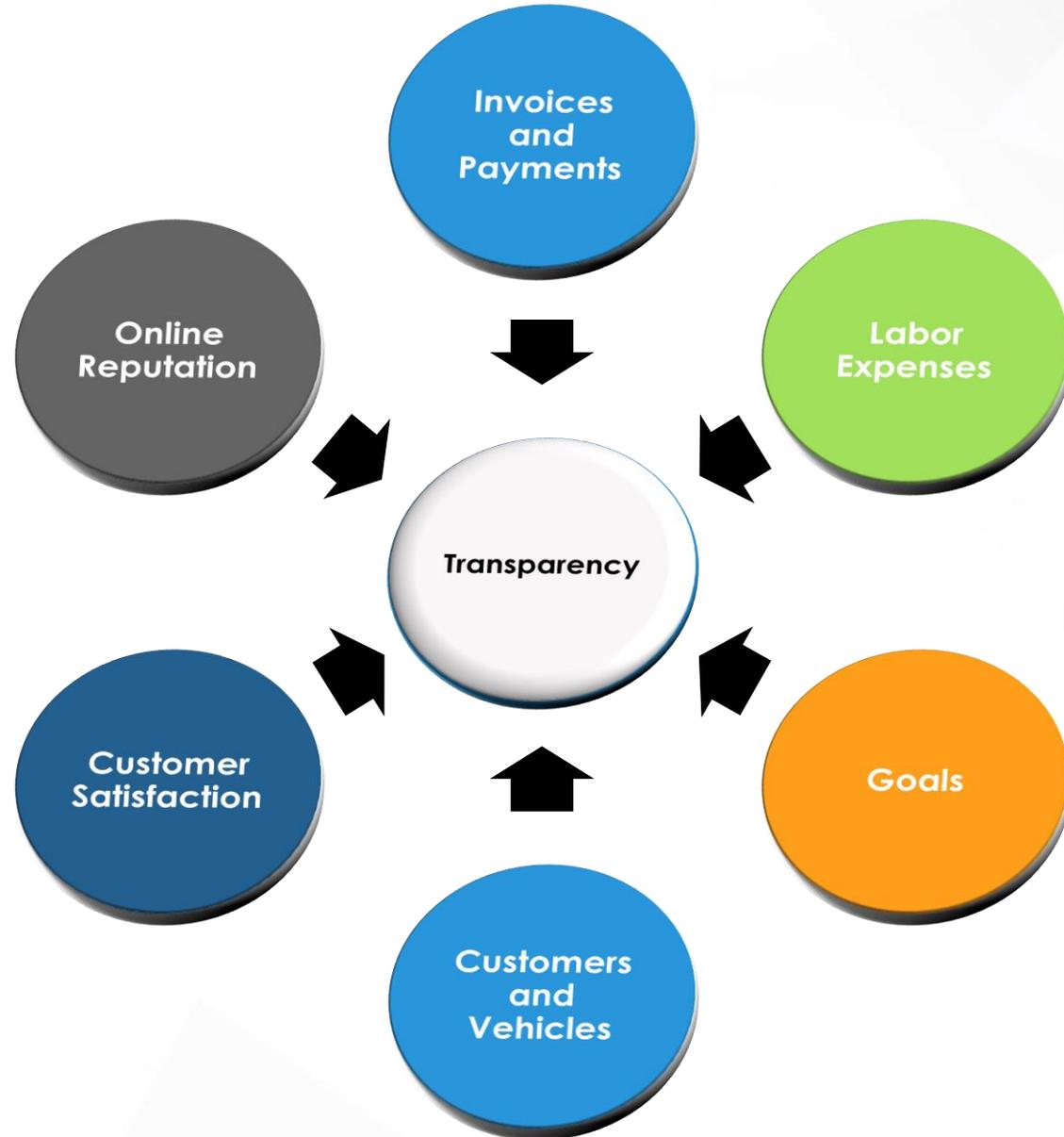
Way





What Makes Us Different?

Ingredients for Transparency





DataLynx Online
Report Manager



User Experience

Overview

Intuitive Experience

- ✓ Reports and Dashboards
- ✓ Folder-based Organization

Subscription-based Enablement

- ✓ Users may subscribe to auto-delivery

Multiple Delivery and Export Options

- ✓ Web-based display
- ✓ Export to multiple formats
- ✓ Email delivery
- ✓ Mobile delivery

Pre-defined Date Ranges

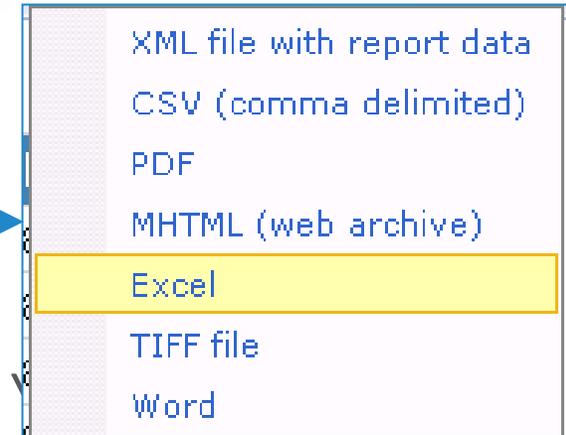
- ✓ Ex: “Month-to-date” and “Same Dates Last Year”

Comparisons

- ✓ Time-based comparisons for many reports and dashboards

Custom Reports and Dashboards

- ✓ Specific to your company’s needs (additional cost may apply depending on complexity and time to create customizations)





Report Manager

Getting Started

Internet Browsers

- ✓ Chrome
- ✓ Microsoft Edge
- ✓ Microsoft Internet Explorer
- ✓ Mozilla Firefox

Open DataLynx Report Manager

- ✓ <http://reportmgr.datalynxonline.com/Reports>
- ✓ <https://www.datalynxonline.com>
 - ☐ Click “Report Suite” => “Home”



Report Manager

Navigation Overview

Folders

- ✓ Reports saved in folders
- ✓ Folders by category
- ✓ Click folder to see reports

Search

- ✓ Use key words to locate the right report for the job

Subscriptions

- ✓ Click “My Subscriptions” to review your list of email-delivered report jobs



Report Manager

Navigation Links

The screenshot shows the DataLynx Online interface. At the top, the title bar reads "DataLynx Online" with a settings gear icon on the right. Below the title bar is a navigation bar with "Favorites", "Browse", and "Settings" buttons. A red arrow points from the "Report Manager" text to the "Favorites" button. The "Settings" dropdown menu is open, showing "My subscriptions" and "Site settings" options, with a red arrow pointing to "My subscriptions". To the right of the navigation bar is a search bar with the text "Search..." and a magnifying glass icon, with a red arrow pointing up to it. Below the navigation bar is a "Home" section with a "Home" link. The main content area is titled "FOLDERS (18)" and contains a grid of folder cards. A red arrow points from the "FOLDERS (18)" header to the "Admin" folder card. The folder cards are arranged in a 4x3 grid:

Admin	Customer Analysis	Dashboards
Employee	Gross Profit	Marketing
Sales	Services	Store Ranking
Support	Tire	Vehicle Analysis



Report Folders

Report Types

Admin

- ✓ Administrative “alerts”

Customer Analysis

- ✓ (see DataLynx Admin for this feature)

Dashboards

- ✓ Custom Focus Reports
- ✓ Compare Results to Goals
- ✓ Highlighted Results (ex: Green vs. Red)

Employee

- ✓ Compensation-based reports and alerts

Gross Profit

- ✓ GPM-based reporting and comparisons



Reports Folders

Report Types (cont.)

Marketing

- ✓ Campaign performance (for CRM and prospect marketing clients)

Sales

- ✓ Multiple sales-based reports
- ✓ Drill-down to individual invoices
- ✓ Track corporate-sponsored financing

Services

- ✓ Key service-based reports and alerts

Store Ranking

- ✓ Reports for ranking stores by criteria such as total sales, GPM, specific product and service sales, etc. Used for competition-tracking amongst stores to inform and motivate store managers

Tires

- ✓ Tire product specific report(s)

Vehicle Analysis

- ✓ Vehicle-based reports and dashboards
- ✓ (additional reports based on vehicle make/model/year coming soon)



Basics

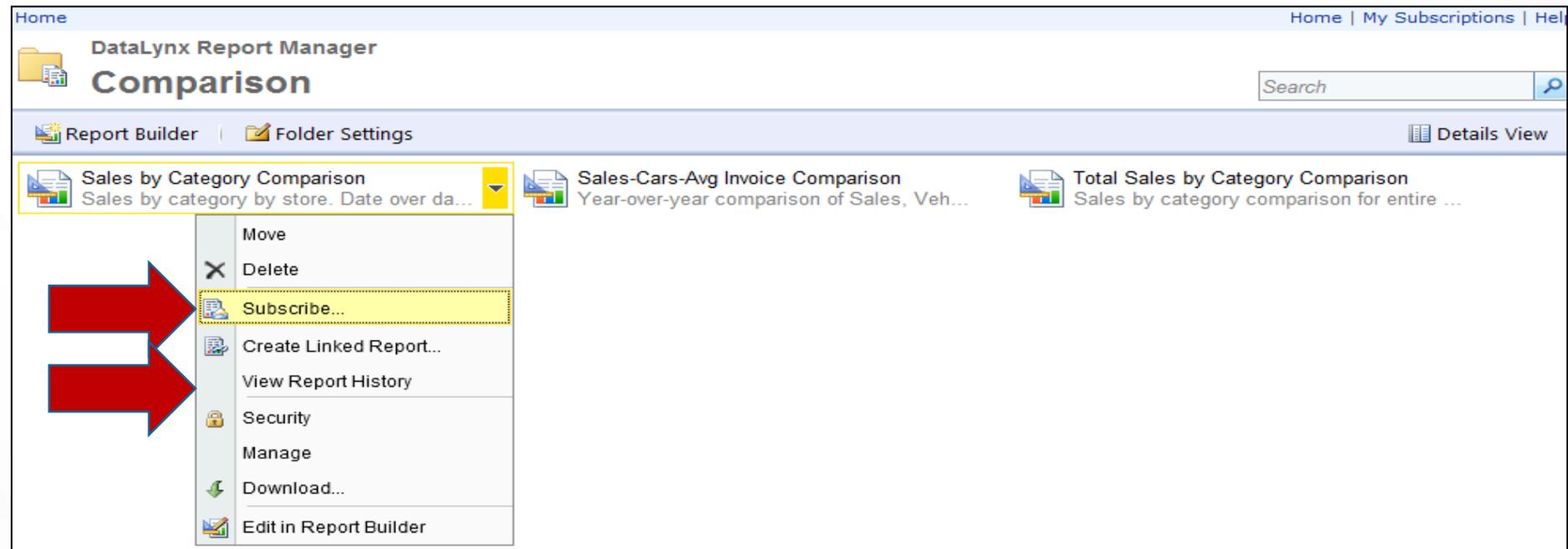
Execute Reports

Drop-down Menu

- ✓ Report User: **Subscribe, View Report History**
- ✓ Report Builder (Access reserved to DataLynx Cloud power users only)
- ✓ Folder Settings (Managed by CorpIM admins only)

Launch Report

- ✓ Click report name to open





Common Report Parameters

- **Delivery Options**

- ✓ Unless you're a Private Cloud user, always "E-Mail"

- **To:**

- ✓ Email to whomever you want. Email address do NOT need to be for subscribers.

- **Report Format:**

- ✓ To render on the email, use "web archive"
- ✓ For file attachment, use Excel, Word, PDF, etc.

- **Other options:**

- ✓ Include Report – recommended always
- ✓ Include Links – not frequent

- **Report Parameter Values:**

- ✓ Never set custom dates on a scheduled report. Simply select the Date Range.

Report Delivery Options
Specify options for report delivery.

Delivered by:

To:

Subject:

Include Report Render Format:

Include Link

Priority:

Subscription Processing Options
Specify options for subscription processing.

Run the subscription:

When the scheduled report run is complete.
At 8:00 AM every Mon of every week, starting 2/28/2015

On a shared schedule:
At 8:00 AM every Sun, Tue, Wed, Thu, Fri, Sat of every week, starting 1/5/2014

Report Parameter Values
Specify the report parameter values to use with this subscription.

Reporting Group

Date Range
 Use Default

Schedule Subscription

- Shared Schedule

- ✓ Support has several predefined, shared schedules that may be used. Click a shared schedule to see the schedule parameters. New shared schedule requests may be sent to Support for evaluation as a published schedule.

- Select Schedule

- ✓ Use this option if a shared schedule doesn't fit your need.
- ✓ Run by Hour, Day, Week, Month or Once. Set days and time.

Run the subscription:

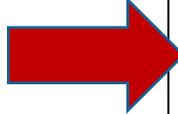
When the scheduled report run is complete.

At 8:00 AM every Mon of every week, starting 2/28/2015

On a shared schedule:

At 8:00 AM every Sun, starting

- Evening Ops Reports
- Monthly Marketing
- Morning Ops Reports
- Weekly Campaign Reports
- Weekly Client Admin
- Weekly Missing Dates Notifications
- Weekly Payroll Reports
- Week-to-Date Ops Reports



Hour

Day

Week

Month

Once

Daily Schedule

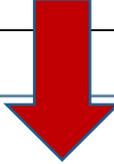
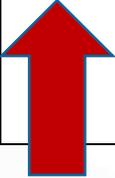
On the following days:

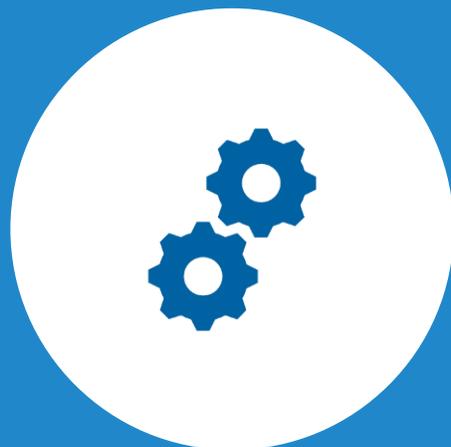
Sun Mon Tue Wed Thu Fri Sat

Every weekday

Repeat after this number of days:

Start time: : A.M. P.M.





DataLynx Online Admin



Administration

Manage Company

Corporate Hierarchy Setup

- ✓ Brand
- ✓ Regions
- ✓ DMA and Districts
- ✓ Associate Manager Names

Franchise Setup

- ✓ Franchisee
- ✓ Legal Entities

Common

- ✓ Store Locations
- ✓ Standardized product and service categories
- ✓ Update Goals by Location



Administration

Maintenance Features

Closed Date Entry

- ✓ Enter dates each store will be closed during normal business days
 - ✓ Facilitates accurate goals and pro-rated reporting
- ✓ Major U.S. federal holidays are automatically set to closed including New Year's Day, 4th of July, Thanksgiving and Christmas only

Monthly Budget

- ✓ Basic Budget entry system

OU Management

- ✓ Manage store info such as Name, address, phone, website, store hours, contact, etc.

Tech Maintenance

- ✓ Similar to “Map Technician” (See the following link for additional guidance for Employee Compensation: https://www.datalynxonline.com/help/Compensation_Module_for_ROWriter.pdf)



Administration

Goals

Currently, goals are managed by submitting an Excel document for all stores to helpdesk@datalyonxonline.com

General Amount Goals

- ✓ DailySalesGoalAmt – Base daily sales goal. Rolled-up for date ranges.
- ✓ AvgInvoiceAmt – Average invoice amount goal.
- ✓ DailyAlignAmt – Daily alignment sales goal.
- ✓ DailyCompareSales – Used as a basis for reporting “comparison” sales on Comparison reports. Example: When no historical data available for a new store. Also may be used in conjunction with ForceOverride to override comparison period sales when historical data is not in line with current period data.

General Percent Goals

- ✓ SalesGoalPct – Goal for sales % increase from comparison period (typically same dates for prior year)
- ✓ PremLOFPct – Goal for premium oil change (LOF) % of all LOF services.
- ✓ ServiceMarginPct – Goal for Service Margin (excludes Tires).
- ✓ TireMarginPct – Goal for Tire Margin.
- ✓ FinancePct – Goal for payments using “financing” payment methods (ex: Midas Card, Easypay) as a % of total payments.

Units Goals

- ✓ DailyTireUnits – Goal for number of tires sold daily
- ✓ DailySynthLOFUnits – Goal for number of synthetic oil changes (LOF) sold daily
- ✓ DailyHMLOFUnits – Goal for number of high-mileage oil changes (LOF) sold daily
- ✓ DailyFlushUnits – Goal for number of Flush services sold daily

Custom Goals

- ✓ Request custom goals along with custom reports and dashboards



Administration

Common Issues and Resolutions

Invoice Mismatch

- ✓ As indicated in the “Data Integrity Checks” section, DataLynx Online recalculates each invoice’s total amount by breaking down labor, sales parts sales, supplies and discount/coupons and rolling up. If this does not match the sub-total (before tax) on the invoice header, an alert report will be sent to the pre-configured recipients (requires subscribe to alert).
- ✓ The most common cause of invoice mismatches for RO Writer users is the “Split Ticket” function in RO Writer. DataLynx Online does not support RO Writer’s split ticket function.
- ✓ Invoices should be corrected in RO Writer and resubmitted

Missing Clock-out

- ✓ When a timecard is transmitted with no clock-out time for a clocked-in employee, an alert may be configured to follow-up with the store
- ✓ This alert report may be configured in Report Manager

Tech Changes on Invoices

- ✓ If technicians on invoices previously transmitted to DataLynx Online are changed thereafter, but no change to overall sales for the store for the date, DataLynx Online will not detect the change
- ✓ After making the technician change(s) on the invoice(s) for the previously submitted date, a store admin should re-transmit the date using the DLClient application on the store server using the “Tools” => “Retransmit Date” menu.



DataLynx Online
Employee Compensation



Manage Employees

Employee Setup

All Employees

- ✓ Managers
- ✓ Technicians
- ✓ Office Staff

Payroll Cycle

- ✓ Weekly
- ✓ Bi-Weekly
- ✓ Semi-monthly

Compensation setup

- ✓ Compensation Method
- ✓ Clock Hour Rate
- ✓ Flat Rate
- ✓ Salary
- ✓ Commission Schedules
- ✓ Benefits Compensation Categories



Compensation

Compensation Process

Calculated Daily

- ✓ Employee labor included with key reports and dashboards daily
- ✓ Transparency into technician quality

End-of-Payroll

- ✓ Finalize and close at the end of the payroll cycle
- ✓ Export for upload to Payroll system

Key Reports and Alerts

- ✓ Gross Profit
- ✓ Employee Focus
- ✓ Labor % of Sales Summary
- ✓ Labor % of Sales by Employee
- ✓ Missing Clock outs
- ✓ Timecard Changes (after initially submitted)

More detailed Employee Compensation guidance may be found at

https://www.datalynxonline.com/help/Compensation_Module_for_ROWriter.pdf



Employee Compensation

Administrator Oversight

Employee Number

- ✓ Each employee must have a unique employee number for the entire organization
- ✓ If a tech or manager floats between shops, he/she should have the same Employee Number in each shop's point-of-sale system
- ✓ We strongly recommend a central individual be assigned ownership for generating and managing the Employee Numbers for the entire organization
- ✓ No employee should have more than 1 Employee Number. This will likely result in clock time being split among the multiple employee numbers for the 1 employee.
- ✓ If a situation occurs whereby (1) multiple employee numbers for a single employee or (2) an employee number for another employee (active or inactive) is reused for an employee, and the data has been sent to DataLynx, a Support technician will need to work with the impacted store(s) to resolve.

Adding Employees

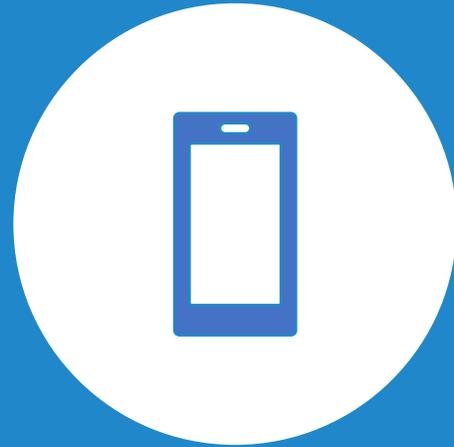
- ✓ An employee will be auto-generated in DataLynx Online when the normal daily transmission is received containing a new Employee Number
- ✓ Basic and default info will be set for an auto-generated employee
- ✓ The Compensation Admin should then finalize the employee's compensation setup in the DataLynx Online Admin's "Employee Maintenance" section
- ✓ Employees may be manually added if desired in the DataLynx Online Admin's "Employee Maintenance" section. It is very important to setup with the same Employee Number that will be setup in the point-of-sale system.

Technician Mapping

- ✓ An employee may be mapped to 1 or more Tech Number. When a new Tech Number is added, the Compensation Admin will receive an alert to "Map Technician". Simply open the "Map Technician" screen under "Payroll", open the technician for the specific store, and select the Employee from the drop-down list.

Corporate Budget Indicator

- ✓ If an employee is not part of a specific store budget, such as a back-office controller or admin, and you'd like to include their compensation within DataLynx Online, you may setup the employee in DataLynx Online with the CorporateBudgetIndicator flag set to True. This flag is implemented by DataLynx Support upon request.
- ✓ Compensation for employees on a corporate budget may be excluded from many reports by setting the "ExcludeAdmin" report indicator to "Yes"



DataLynx Online
Mobile



Configuration

Mobile Setup

1. Download “Reports Everywhere” app for Android:

<https://play.google.com/store/apps/details?id=com.kemiphone.ssrs.pro&gl=AT>

(May require VPN app on phone to access)

2. Enter url:
<http://reportmgr.datalynxonline.com/ReportServer>
3. Enter group’s folder name
4. Enter Credentials
5. SharePoint = No
6. Test Connection
7. Add

Reports Everywhere - Lite

Server Information

Report Manager
rtmgr.datalynxonline.com/ReportServer
/

Credentials

User Name
Password

Is Sharepoint Server? Yes No

Add Cancel

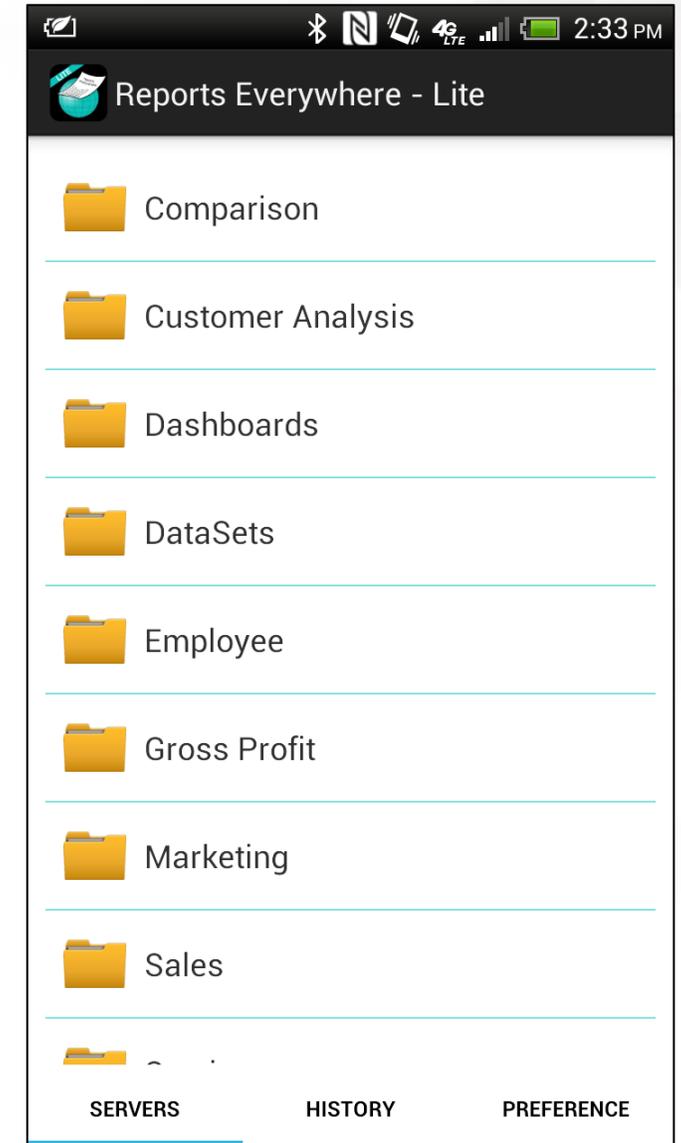
Test Connection



User Experience

Mobile Navigation

- ✓ Same reports
- ✓ Simple folder structure
- ✓ Categorized folders





Drill-down

Mobile Reports

10:43 PM

Reports Everywhere - Lite

Daily Sales Comparison

Group Name: Demo-Group10 Category: - ALL -
Date Range: Last Week DateRangeID: 4
Start Date: 11/3/2014 12:00:00 AM End Date: 11/9/2014 12:00:00 AM

1 of 1 Find | Next

Daily Sales Comparison

Date Range: to
Report Group:
Category:

Date	Store 01			Store 02			J/I
	J/I	Cars	Sales	J/I	Cars	Sales	
11/3/2014	2.58	19.00	\$1,375.72	3.40	15.00	\$6,160.86	3.00
11/4/2014	3.00	14.00	\$1,601.27	2.50	6.00	\$1,483.50	2.75
11/5/2014	2.77	13.00	\$820.23	2.25	8.00	\$1,300.00	4.57
11/6/2014	3.08	13.00	\$1,931.19	3.33	6.00	\$1,103.93	4.71
11/7/2014	2.64	11.00	\$2,095.42	4.89	9.00	\$6,072.79	4.00
11/8/2014	3.73	11.00	\$3,679.24	3.23	13.00	\$3,052.50	3.31
11/9/2014	0.00		\$0.00	0.00		\$0.00	0.00
Weekly	17.79	81.00	\$11,503.07	19.60	57.00	\$18,011.63	22.35
Total			\$11,503.07			\$18,011.63	

11/11/2014 10:42:53 PM

SERVERS **HISTORY** **PREFERENCE**

Daily Sales Comparison

1 of 1 Find | Next

Invoices

OU: Store 01
Start Date: 11/6/2014
End Date: 11/6/2014

Inv #	Inv Date	Acct Date	Customer	Sub Total	Total
0107801	11/6/2014	11/6/2014	TERRENCE BRADY	\$533.79	\$554.16
0107802	11/6/2014	11/6/2014	SUSAN BROYDRICK	\$28.49	\$29.55
0107804	11/6/2014	11/6/2014	EUGENIA FACADA	\$0.00	\$0.00
0107805	11/6/2014	11/6/2014	JOSEPH METZGER	\$68.46	\$72.46
0107806	11/6/2014	11/6/2014	GERRY BAUSEMER	\$28.49	\$29.55
0107807	11/6/2014	11/6/2014	AHOLD USA	\$832.04	\$855.43
0107808	11/6/2014	11/6/2014	MICHEAL SOUSA	\$89.99	\$93.23
0107809	11/6/2014	11/6/2014	FRANK TENORE	\$128.03	\$132.12
0107810	11/6/2014	11/6/2014	SARAH DIFFER	\$28.49	\$29.55
0107811	11/6/2014	11/6/2014	ZACK GASSE	\$28.49	\$29.55
0107812	11/6/2014	11/6/2014	KUFRE UKO	\$112.94	\$115.06
0107813	11/6/2014	11/6/2014	KATHY PRATT	\$28.49	\$29.55
0107816	11/6/2014	11/6/2014	SAM CREEDY	\$23.49	\$24.55
Total				\$1,931.19	\$1,994.76



DataLynx Online
Automation and Support



Automation/Support

Integration Data Quality Support

- ✓ **Data Integration with Point-of-sale system**
 - We map your products and services to a standard template
 - Support multiple POS systems per company
 - Daily transmit
 - Automatic resubmit for data modifications
 - On-demand data refreshes
- ✓ **Data Integrity Checks**
 - Missing data
 - Sales mismatched
 - Resubmit frequency
 - Customer address changes
 - Data integrity checks (break-down, build-up)
- ✓ **Business Advisor Support**
 - To help you get the most out of your subscription
- ✓ **Customer Support**
 - Scheduled training and on-demand retraining sessions
 - 9 x 5 x 6 live support helpdesk@datalynxonline.com
 - On-call after hours support **(800) 730-4294**