User Manual and Manager Manual

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To order – www.superconsultinggroup.com

Reasons to get Redbook after your 30 days beta testing – instead of an Excel list

- Keeping your tasks in Excel is hard to maintain and for everyone can't update at the same time
- You can use my Tips and spreadsheets (which are not all there yet in the beta version) to create your "How to"
- Redbook "encourages" your staff to browse and take on new tasks
- You are creating a very specific training, audit, storage and documentation system for your office -- Excel isn't designed or capable of this type of storage.
- You can email from Redbook tasks that are "Due" along with the "How to" file attached
- We will continue to add to Task Master so you'll get ideas from hundreds of controllers using it daily
- Creating a "How to" manual is a huge project; there will probably be over 300 by the time we are done! You can't use Excel for that.
- Redbook tracks who performed the task, even if it isn't assigned to them – which encourages your staff to help others because they get "credit" for it!
- You can give your dealer/GM/CFO a login eventually – so they can really see how much you do every month!
- For multi-stores, we have a "client" CFO security login that a CFO, CPA firm or dealer can use to see how each dealership does a certain task.
- It is only $95 a month* for our beta testers – a few dollars a day to keep your office organized (save and buy a year's subscription by the end of the year and get two months for free!) *50% off normal price.

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Quick Start

- Watch the demo at www.supercontrollergroup.com
- Login as Sandi Jerome, with a password of **acct** and read the manual – add some "Done" – "How to" – feel free to play with it – I won't mind.
- Login in with your username (in a separate email)
- **Setup, Users** - Add the users in your office – see Manager Setup in this guide
- Start going through your **All Tasks - Manager** and assign to your staff, change frequency, date, skill
- Use **Setup, Tasks Setup** to add, edit or delete any task you don't want (see Manager Setup if you delete by mistake)

Login to Redbook

Redbook runs in your browser, so start Internet Explorer, Chrome, Firefox, Safari, etc., and click on this link;

www.dealerstar.org/redbook/login.php

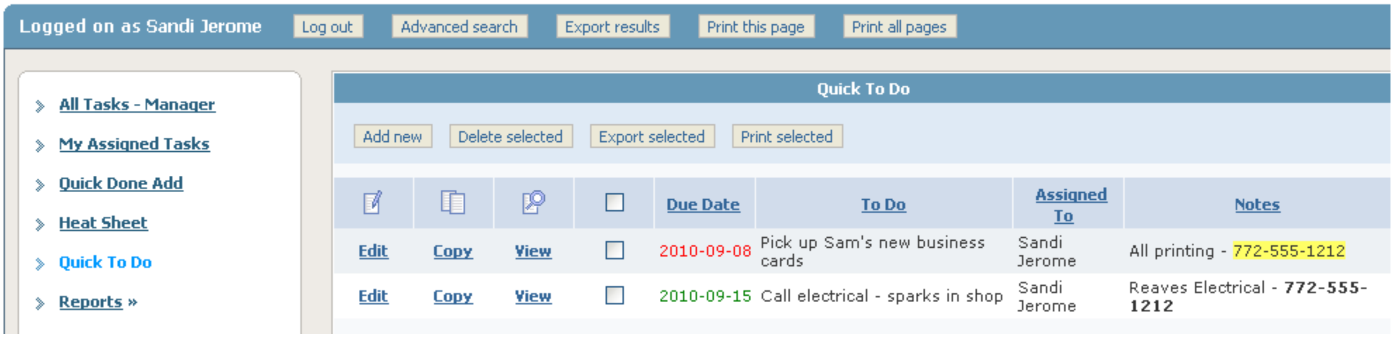
Before you use the login sent to you, please login with my name to learn how it works

Username: **Sandi Jerome** (case sensitive)

Password: **acct**

Quick to Do– Screen Size

The opening screen is the Quick to Do. Hold down the **Ctrl** key and **+** to make the screen larger, or Ctrl key and – to make it smaller.   The **Quick to Do** are one-time tasks that do not reoccur and do not need tips, how to, and dones.



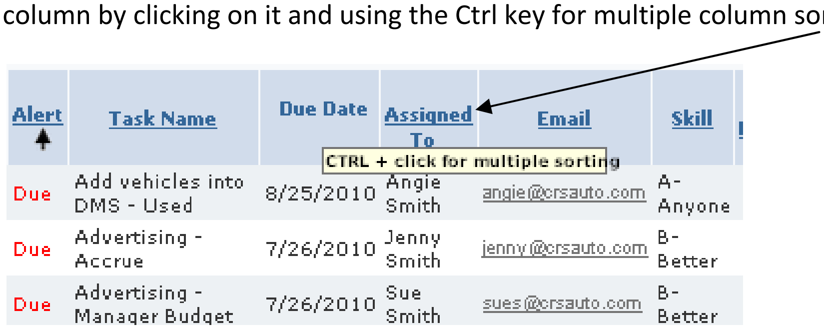
				Due Date	To Do	Assigned To	Notes
Edit	Copy	View	☐	2010-09-08	Pick up Sam's new business cards	Sandi Jerome	All printing - 772-555-1212
Edit	Copy	View	☐	2010-09-15	Call electrical - sparks in shop	Sandi Jerome	Reaves Electrical - 772-555-1212

How Redbook Works

Redbook tracks tasks by a variety of frequency (Daily, Weekly, Monthly, Yearly, and Close) and by whom the task is **Assigned To** or **Skill** level. It enables you to keep in one database the tasks that your dealership performs, how to perform these tasks, when they were last "done" and the notes and files that belong to the tasks.

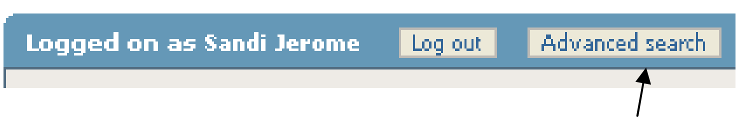
Sort

After you login, you'll see the **All Task/Due** list for your dealership. It is sorted by Task Name, but you can sort on any column by clicking on it and using the Ctrl key for multiple column sorting

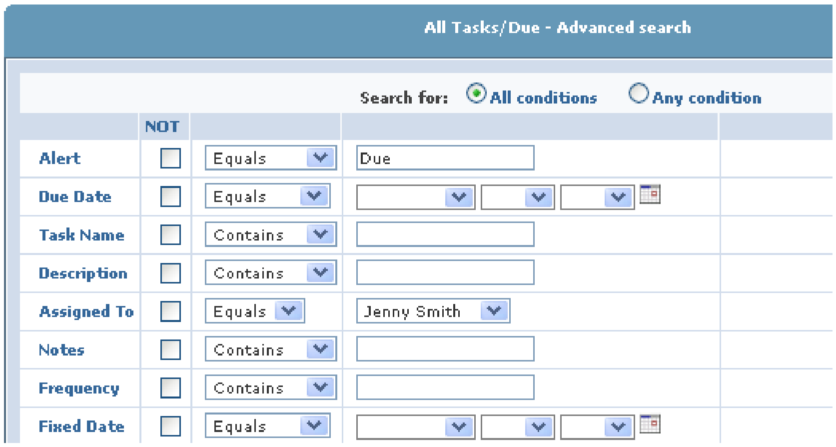


Alert	Task Name	Due Date	Assigned To	Email	Skill
Due	Add vehicles into DMS - Used	8/25/2010	Angie Smith	angie@crsauto.com	A-Anyone
Due	Advertising - Accrue	7/26/2010	Jenny Smith	jenny@crsauto.com	B-Better
Due	Advertising - Manager Budget	7/26/2010	Sue Smith	sues@crsauto.com	B-Better

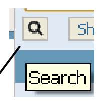
Search - Advanced



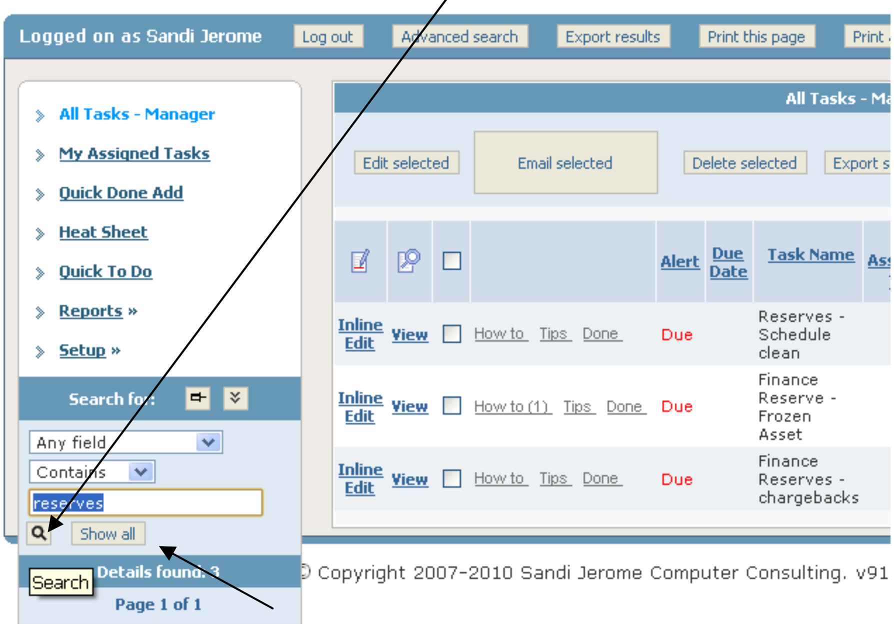
You can search two ways for a task. The **Advanced search** button on the top of the screen is the most comprehensive. Let's say that I see Jenny looking bored – I can search on any "Due" tasks that I've assigned to Jenny.



Search – Quick

The Quick Search panel is to the left of most lists. You can either enter in the **Search for:** box for any item on the page – and just a portion of it (as you type, it "suggests" tasks that you might be looking for.) Click on the Search icon to find the records that match your 

criteria.



Click on the **Show all** to bring back all the records.

All Tasks – Manager or All Tasks - Office Ok and Due

All Task lists are tasks that were selected at Setup from the Task Master. The Alert of **OK** means that Due Date is today or in the past. The Manager view differs from the Office view only by the fields "File Confidential" in the How to and Dones that link to the list.

Links to the Left of Alerts

If you notice there are three links to the left of the Alerts; Done, How to, and Tips. If you hover over one that has a (1), you'll see the information without having to actually open the link. If you do click or double click on the link, it will open and you can add or edit the **Done** and **How to**. The **Tips** are "Sandi's Tips" so those cannot be edited.

Done

As office clerks log in, they enter "Done" tasks – either from the "My Assigned Tasked" list – or by using the **Quick Done Add** – if they are updating many tasks for the day. Will performing a "Done," the user sets a new Due Date that normally updates the Alert to **OK.**

How to

These are specific to your dealership and are a place to enter your instructions and notes on how to perform the task. This might include a file that you attach – like a spreadsheet, or a page from your company policy book.

Tips

Tips are the guides that I write to help you create your own "How to" entries. I also attach files to the Tips like a spreadsheet and/or comments. I am still loading tips, so you should see more and more each day.

My Assigned Tasks

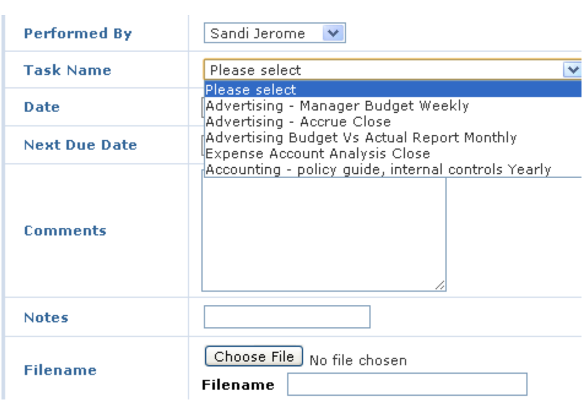
When a task is assigned to the logged on user, then **My Assigned Tasks** shows only their tasks. The links, **Done, How to, Tips** function the same as the links on the list for **All Tasks - Office.** If your staff has **clerk** security, they only see this list. A **clerkplus** can see **All Tasks - Office** but can only View the task list (the **Inline Edit** and **Delete** are disabled.) By letting your staff have **clerkplus** security, it encourages them to search and find tasks that they would like assigned to them. In the next version, we hope to have charts that show the number of tasks assigned by user and skill level. People are naturally competitive!

Entering Done

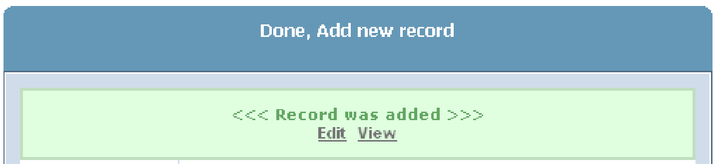
Storing your Done tasks is a valuable tool of Redbook. By having a record, notes, and sometimes a file attached – it is easy to prove that you've done this task during the year. Sometimes it is hard to find the spreadsheet file used back in March, or the copy of your written notes, so keeping them in Redbook gives you that extra layer of safety. In addition, when you convert your full office to using Redbook and it is time to review an employee – you can quickly hover over the "Done" for a task and praise them for completing monthly – or criticize them if they haven't been doing the task each month – or day. There are three ways to enter tasks being done (which enables you to set a new Due Date to make **OK**.) You can click on the Done link on both the **All Tasks** lists or **My Assigned Tasks.** If you are entering lots of "Done" for the day items, then you want to use the **Quick Done Add**.

Quick Done Add

Entering a Done with Quick Done Add is easier if you have lots of tasks to update at once. Click on **Quick Done Add** on the left menu. Then click on **Add new.** This new version filters the task list by the person it was assigned to and then displays only the task for that user. Next, the Task Name also includes the frequency at the end of the name (Weekly, Daily) – to enable you to quickly set a new Due Date.



The date defaults to today's date. You can enter comments and the notes field can be a place to respond to the comments – or you can edit the done later and add to the comments. The Filename enables you to attach a file to the done. For example, if you had a transmittal text that you used to add these 5 vehicles in stock, you could add that to the done for storage. We keep your data on a secure server. Notice the https – in the URL. Click on **Save** when done. It will respond Record was added – notice green box below. Continue adding completed tasks, using **Save** button after each one. When done entering, click on **Back to List.**

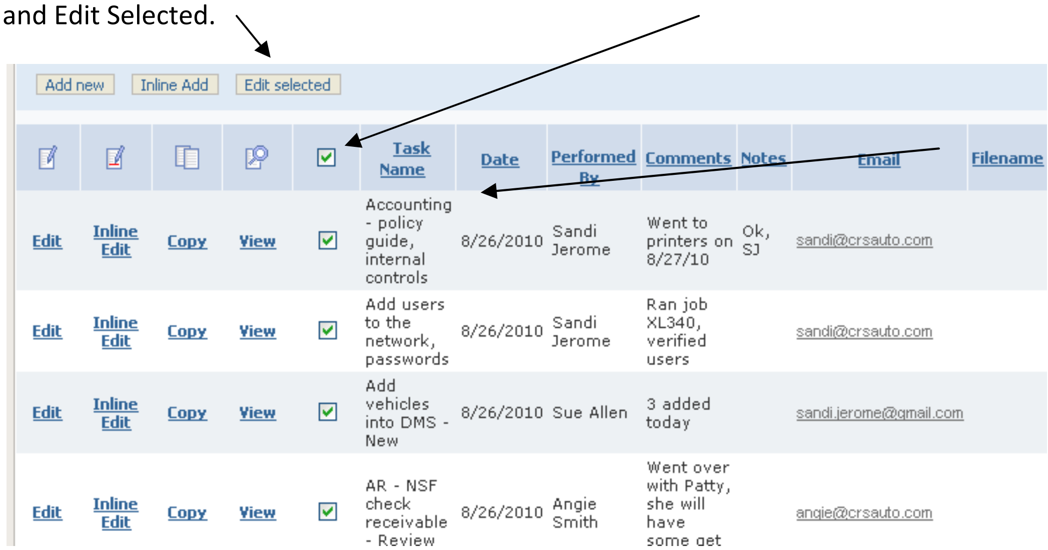


Editing Done Tasks

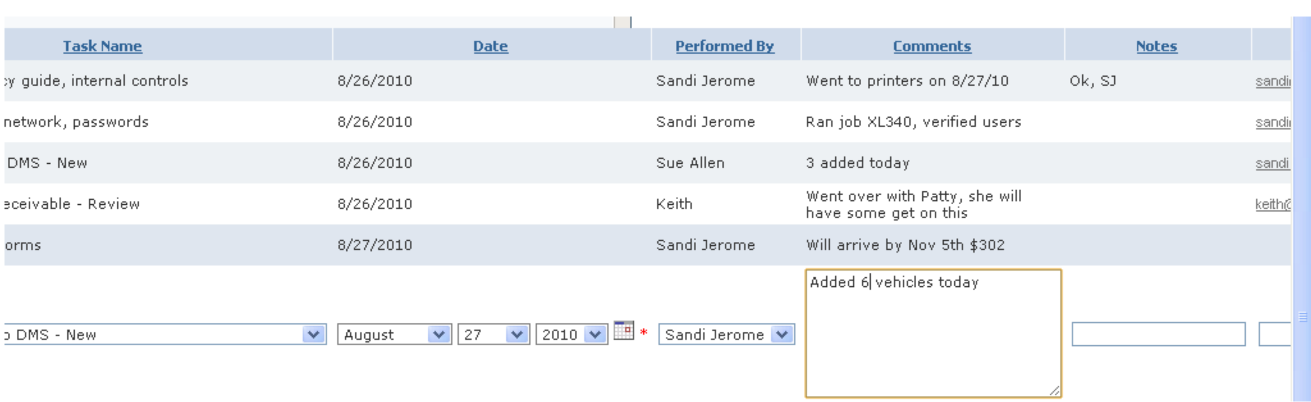
When you click on **Back to List,** you'll see a list of all the Done. If you need to Edit what you just entered, you can either click on Edit or Inline Edit.

Inline Edit, Edit Selected and Copy Features

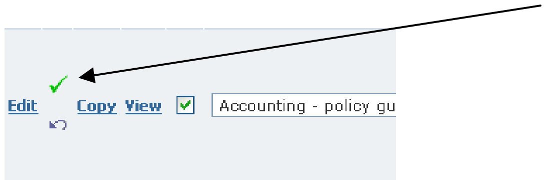
if you need to change many, you might want to perform a search first – or Advance search, and then use the checkbox and Edit Selected.



When you use either the Inline Edit or Edit Selected checkbox, the record doesn't look like the Add screen (the Edit does) – rather it brings up an edit of the record in a list format like the next picture.

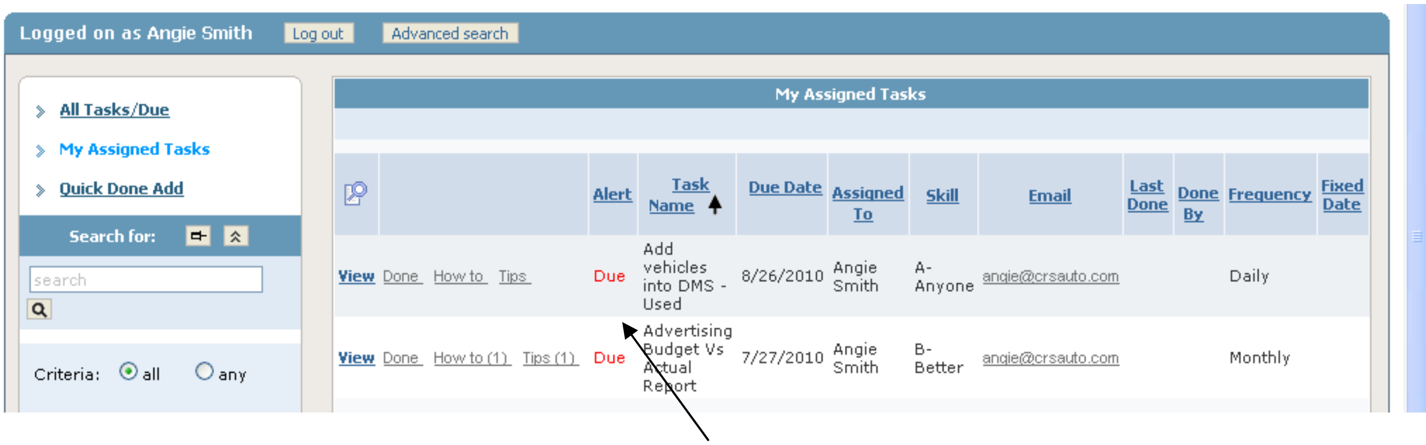


You might need to use your browser **scroll bar** at the bottom of the screen to move to the field you want to edit, but remember to always use the green arrow save.

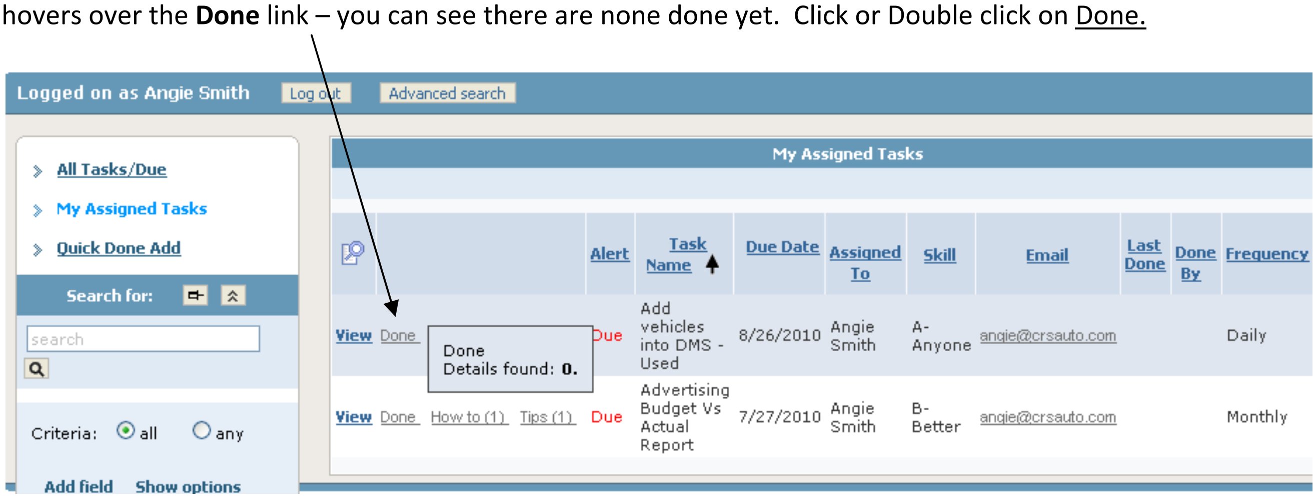


Adding Done from Task Lists

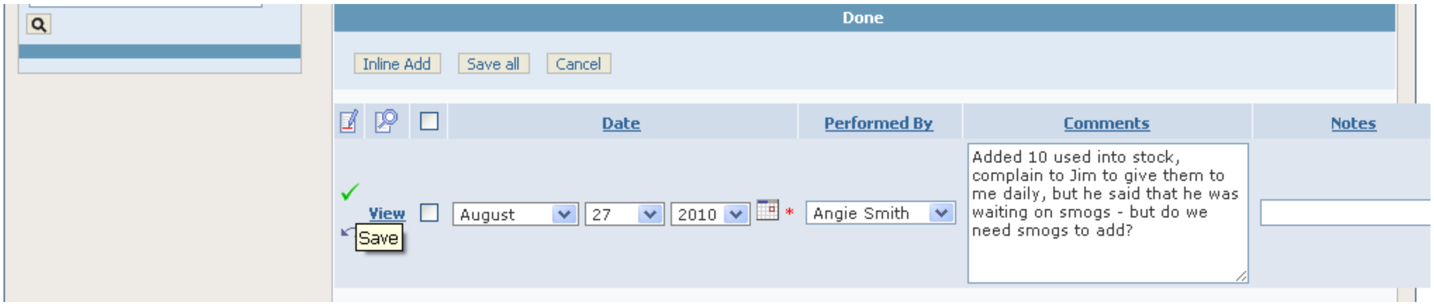
You can also add a **Done** from either of the Task lists by clicking or double clicking on the **Done** link to the left of the Alert column and to the left of **How To** and **Tips** links.



In the above example, Angie Smith is logged in and she has two Tasks due today – one Daily and one Monthly. If she hovers over the **Done** link – you can see there are none done yet. Click or Double click on Done.



The Task opens in the top part of the screen and then you select **Inline Add** to add your **Done** record. It opens in the bottom part of the screen.

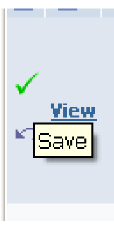


The Date defaults to today

Performed by: select from users for your dealership.

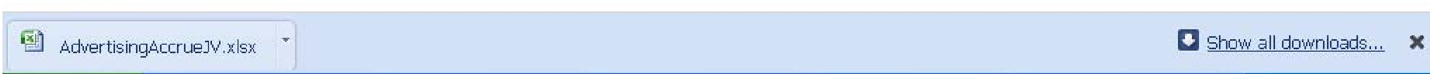
Comment and Notes: Add anything you'd like to save. You can also scroll to the right and add a file to the record.

Click on the **Green Arrow** to Save

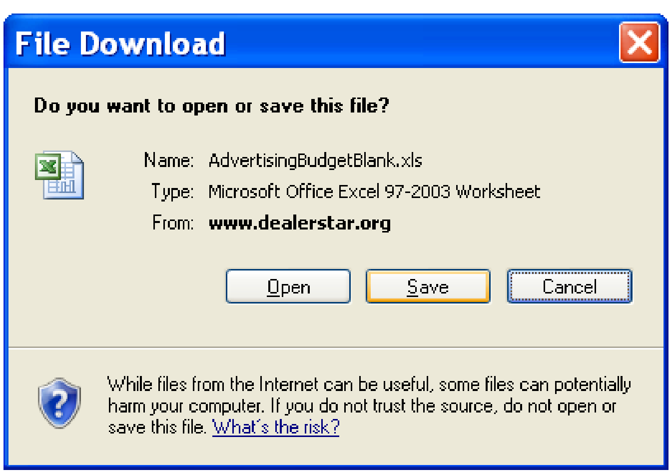


How To

Most Tasks will eventually have How To instructions based on how you perform the task at your dealership. To view a "How to", click on the How to link. If there is a file attached, click on it and if you have Chrome as your browser it will download automatically.



If you have Internet Explorer, it will prompt you to SAVE and select a file location. Do not open the file – always Save first, then open it from where you Saved it.



When you're done looking at the "How to" click on **Back to all Tasks**

Note: End of Redbook User Manual. The next pages are for the manager/Admin person.

Security Overview

The level of security that you select when you add a user determines what your office staff can see and do.

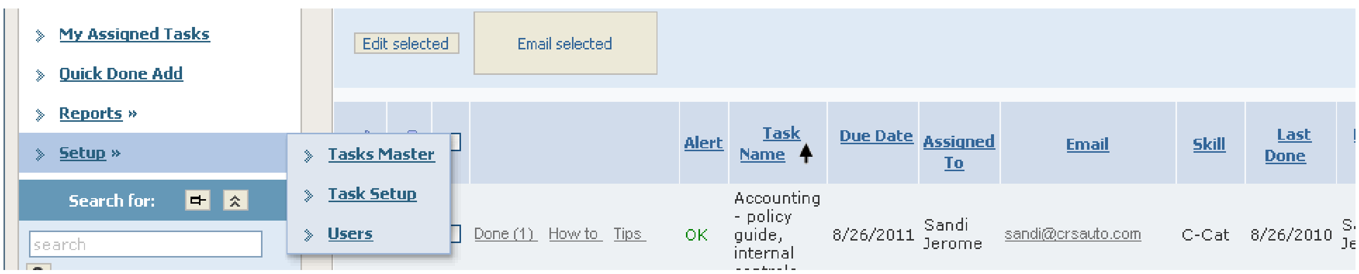
Clerk – sees only My Assigned Tasks, and can add only "How to" and "Done" to their own assigned tasks.

Clerkplus – same as Clerk, but can also view All Tasks – Office. This new "office" view blocks the filename if it is a confidential file and entered in the confidential filename field for both "How to" and "Done." This allows clerks that have the time to browse all Tasks and hopefully asks that more be assigned to them.

Manager – all the above except instead of All Task – Office, has a view All Task – Manager. This new "manager" view can change who it is assigned to, skill level, the frequency and other tasks items. The Manager also sees all file attachments – even if confidential and not assigned to them.

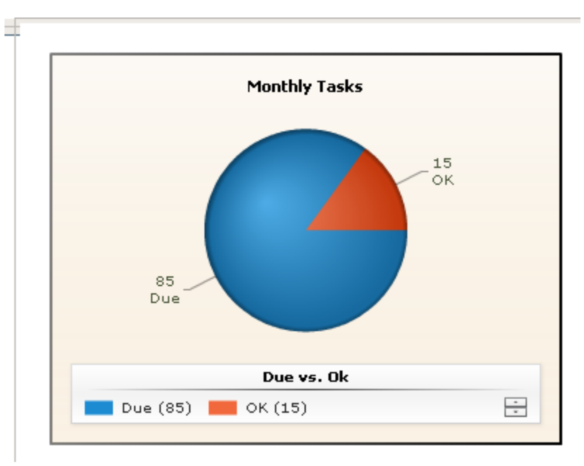
Manager Access

If you have been setup with Manager security; you have a few more selections; Reports and Setup



Reports

This section is underdevelopment and only has one report and chart. As time goes by, we hope that our beta testers will make recommendations on more reports to add.



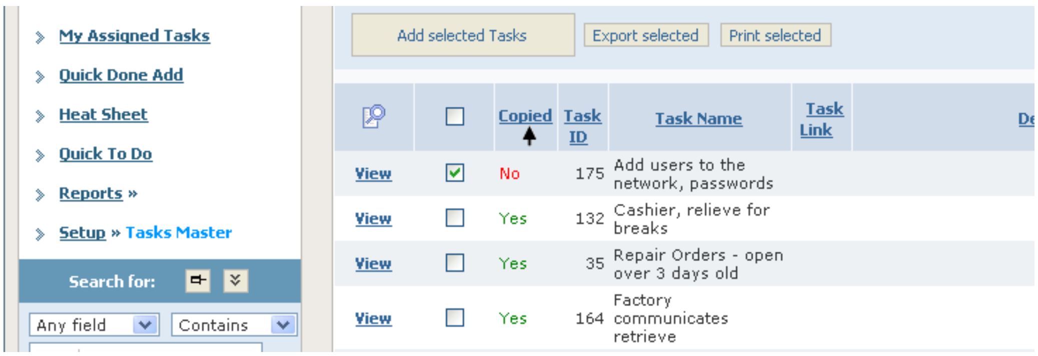
Setup

The setup portion of Redbook is where you manage your **Task Setup** and **Users** along with bringing new Tasks from the Task Master.

Task Master

This is where you can move tasks from my “master” list into your All Tasks lists. On install I automatically add all the existing Tasks in the Task Master. As time goes by, there might be more Tasks added based on user input. In addition, you might initially delete many of the tasks that I added for you. Later you might want to add them back.

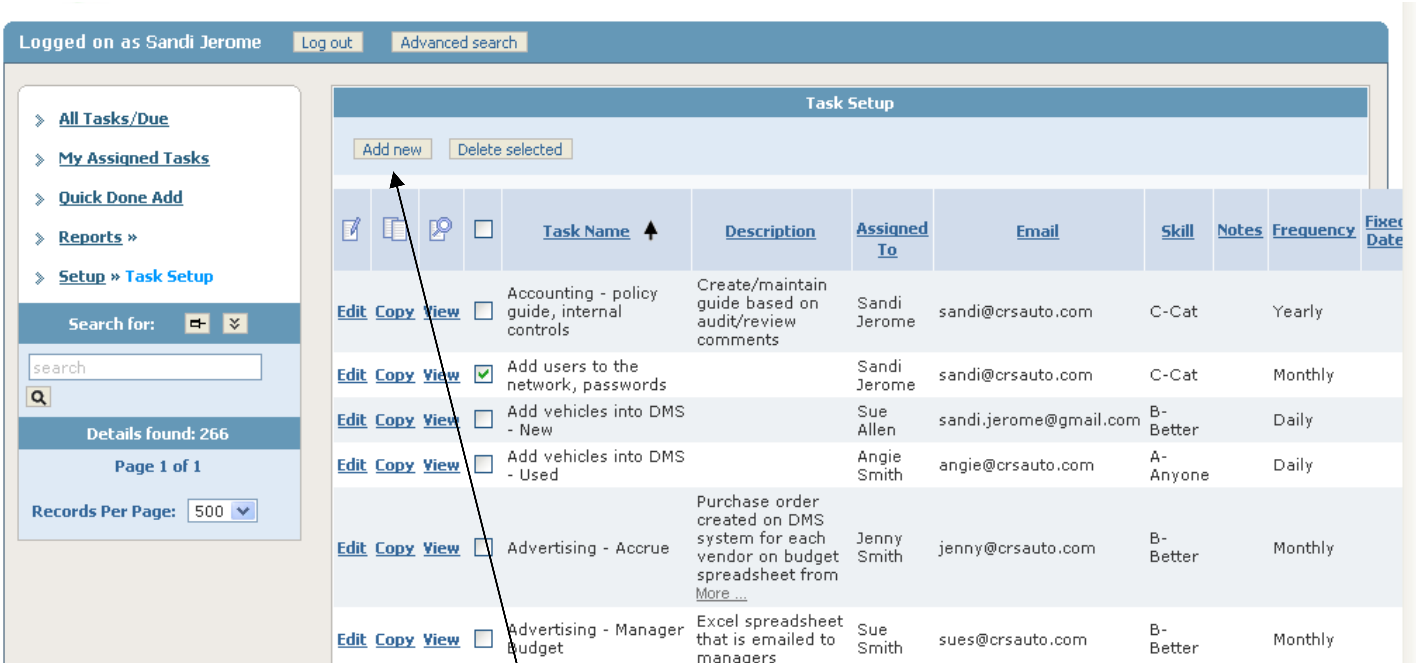
Let’s say that at your dealership the task shown below to **Add users to the network, passwords** is done by your IT department. You might use **Task Setup** to delete that task, but then you get that task added back to you and want to assign that to your payroll clerk. As you can see in the next picture, it does not say “**Copied – Yes”** next to it – that means it is not in your Tasks. Click in the checkbox and then click **Add selected Tasks.** It will now appear in your **All Tasks** list.



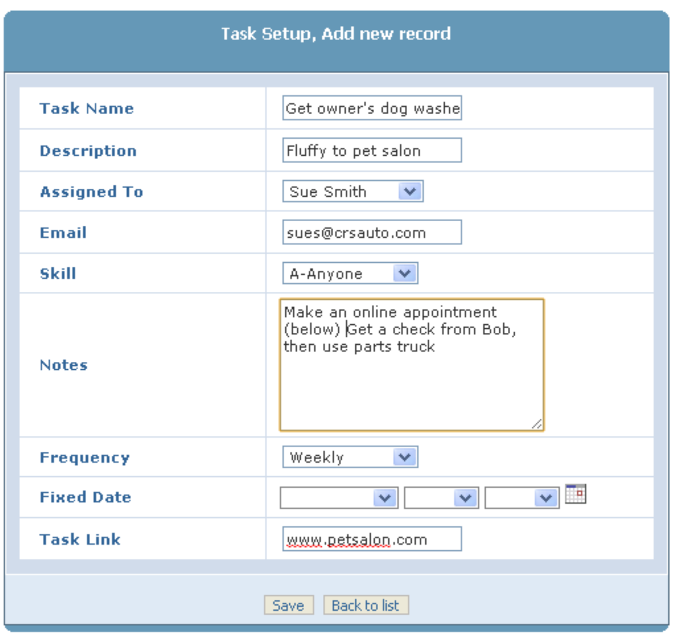
Task Setup

The Task Setup is the same list as **All Task/Due** but it enables you to delete many records, copy, edit and add new records. Because the **Task Name** is what links Tips, Done, and How to records – we do not allow you to edit that field. If you really hate the Task Name, it is better to delete it and add a new Task with your new Task Name.

Warning – if you delete a Task that had a history of Done, How to, and Tip -- you’ll lose that linking. If this happens, just add it back in from the Task Master with the old name and your records will reappear. It is the same as deleting a customer number on your DMS system. If you really must change a Task Name that had a lot of history of Done, just send us an email. I’ll send you instructions on how to use the Relink functions in Setup.

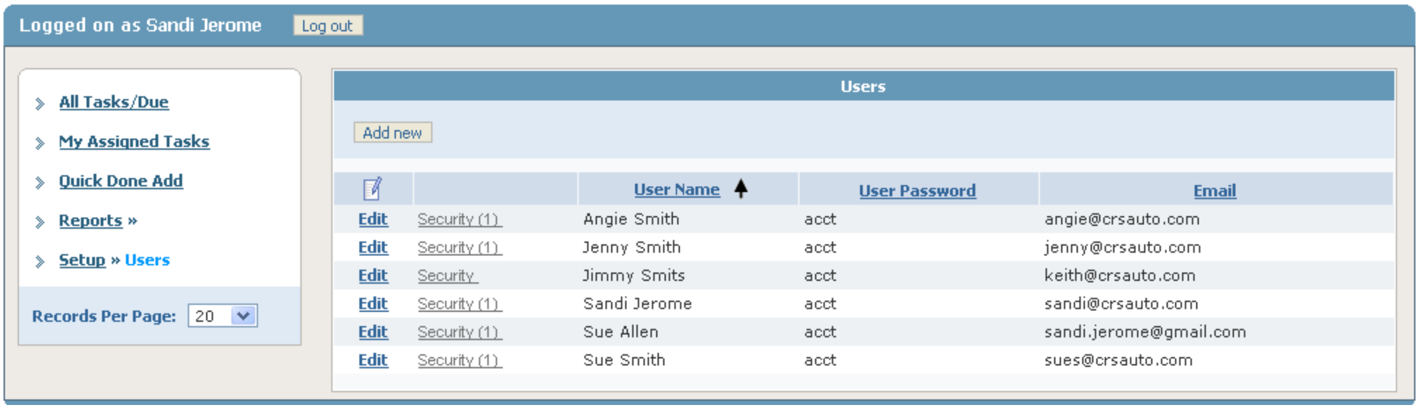


To add a new Task for your dealership, click on **Add New**. Enter your information and **Save,** then **Back to List.** This DOES NOT get added to Redbook's Task Master. Why would other controllers want to wash your dealer's dog??? It also means that if you added a Task for just your dealership and then delete it, it is not in the Task Master. As we get suggestions, we will continue to add to Task Master, but not to your Task Setup, so check the Task Master often to see if there are some new ideas to add to your Tasks. That is another great feature of Redbook – you'll get ideas from hundreds of controllers using it daily.

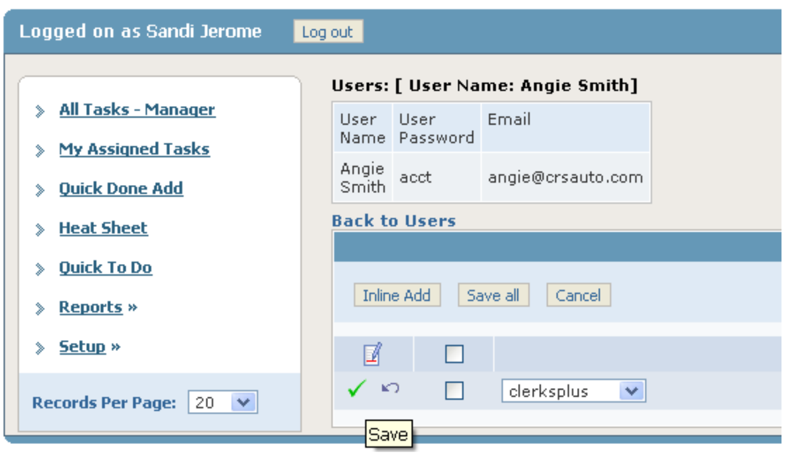


Users

The Setup Users screen enables you to setup new users and add their security level. Without a **Security** level, your user cannot login. In the example below, Jimmy Smits is added to Users, but has no security added – the link to the left of his name doesn't show **Security (1)**



To add a new user, click on **Add New.** Enter you User Name (unique) and password. Click on **Save** and **Back to List**. Click on the **Security** link and then **Inline Add**. Select one of the security choices, then the green arrow to Save.



How to and Tips

Adding your "How to" is similar to adding the "Done" items to Tasks. You can use the Tips that I am creating to help with your "How" to.   Use the search window and type in Reserve

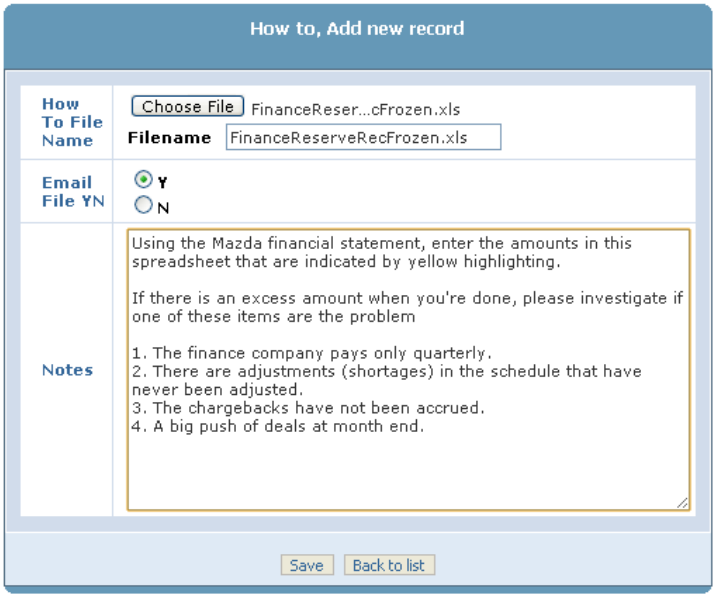
Click on the **Tips** to the left of Finance Reserve – Frozen Asset and then **View.**

Tips, View record [Tip ID: 72]	
Tip Name	Finance Reserve - Frozen Asset
File Name	FinanceReserveRecFrozen.xls
Notes	There should be about 30 days supply of Finance Reserves. There are a few reasons why the supply would be more than 30 days worth: 1. The finance company pays only quarterly. 2. There are adjustments (shortages) in the schedule that have never been adjusted. 3. The chargebacks have not been accrued. 4. A big push of deals at month end. 87 Finance Receivable 88 89 Finance Income New $ 19,767 MTD 90 Finance Income Used $ 6,956 MTD 91 Total Finance Income $ 26,723 Line 89+90 92 93 Days Supply Objective $ 30 Input 94 95 Objective Finance Receivable $ 26,723 Line 91*93*30days 96 97 Actual Finance Receivable $ 39,419 YTD 98 99 Variance (Excess) ($12,696) Line 95-97

Click on the File Name to save the spreadsheet. You can now open the spreadsheet.

Finance Receivable				
Finance Income New	$ 19,767	MTD	Page 4 line 67	
Finance Income Used	$ 6,956	MTD	Page 4 line 68	
Total Finance Income	$ 26,723	Line 89+90		
Days Supply Objective	$ 30	Input		
Objective Finance Receivable	$ 26,723	Line 91*93*30days		
Actual Finance Receivable	$ 39,419	YTD	Page 1 line 17	
Variance (Excess)	($12,696)	Line 95-97		

You can edit it to add your own financial statement lines and then save the spreadsheet. After reading the notes in the Tip, you might want to also add those to your own How to – but edit them, so highlight the notes and copy. Click on **Back to List** and **Back to All Tasks** link. Click on the **How to** link next to the same Finance Reserve – Frozen Asset task. Click on **Add New**

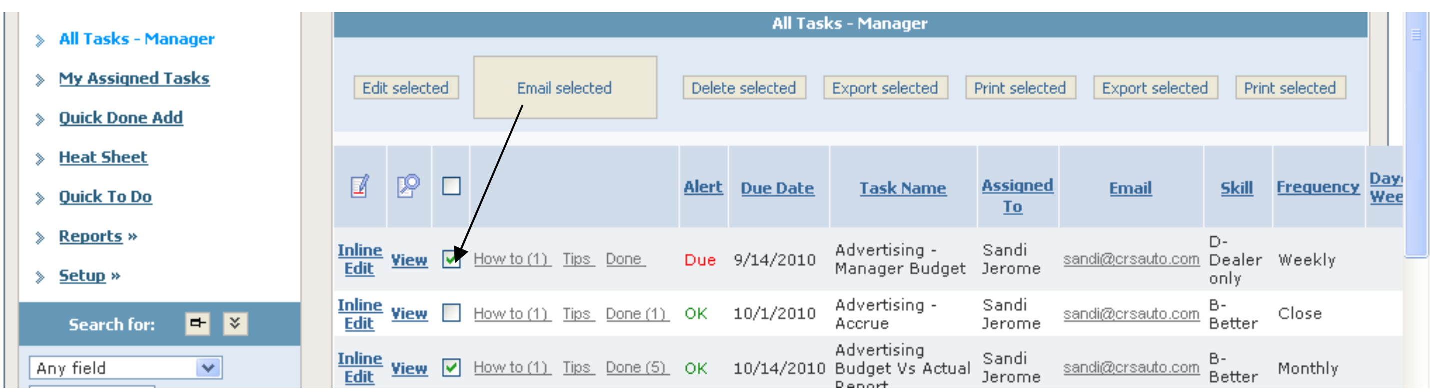


You'll select the new spreadsheet that you edited in the previous step and if you want to email the file when you send an email notice if the task becomes past due, select Y. I added notes that were specific to the dealership, but copied the notes from "Sandi's Tips" to use for investigation.

You must have manager access to Add or Edit the "**How to**" entries for Tasks. Tips cannot be added, edited or deleted – they are "Sandi's tips." If you do not like a tip, just add a new Task in Task Setup with a slightly different Task Name and there will no longer be a Tip for it. My tips link the identical Task Name. Before doing this, please read the warning in Task Setup.

Email selected

If you setup a **How to** where Email file is Y, then when you click on the check box to the left of **Done** and the Email selected button, an email from you will be sent to the Assigned person with information about the Task they need to do and it will attach that How to File. If Email file is N, then just the email will be sent. You can select all "Due" Alerts using Search or Advance Search and then click on the checkbox at the top of the screen and email everyone who has a task in Due Alert status.



Thank you for testing this version of Redbook. Your input is valuable for us to create the first "Daily Workplan" software for the accounting office. Please send me your comments, questions or suggestions – (especially report ideas!) – please Email - sandi@sandijerome.com. THANKS!!!