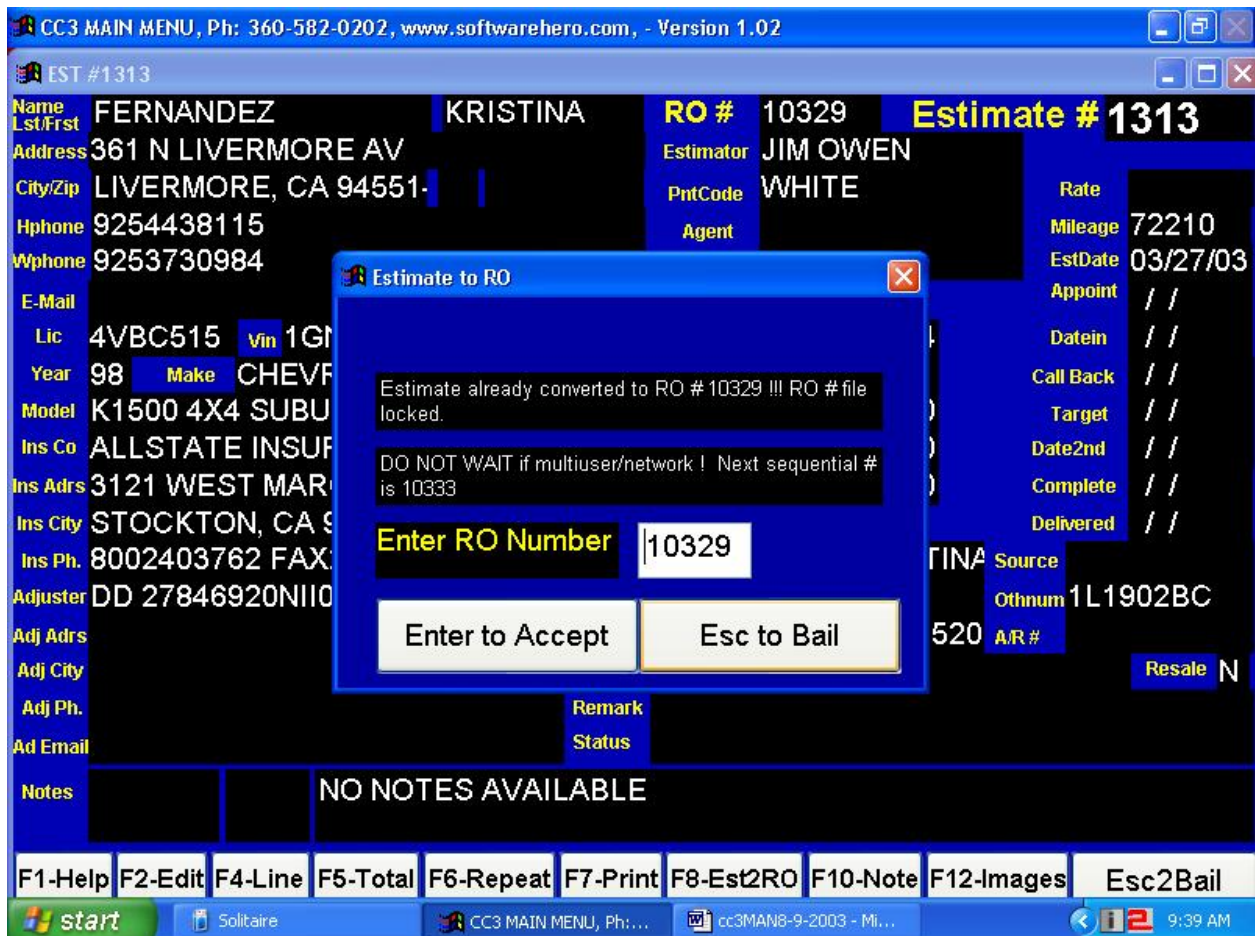


Chapter 8, “Estimate to Repair Order (RO) Conversion”

Converting an Estimate to a Repair Order (RO) is as simple as pressing “F8”; but before you do it, you should understand what’s about to take place. When you convert an Estimate into a Repair Order, everything, Header, Lines, Parts, and Notations are copied into new databases as a Repair Order. The speed of this conversion is directly related to the speed of your system and to the size of the Estimate.

When should you convert an Estimate to a Repair Order? Most shops that really want a handle on how their shop is performing say that this should be done immediately. The reason is two fold; first by doing so it keeps the BRIDGE cleared out and makes bridging much faster, and if you don’t Bridge all Estimates, then your “Batting Averages” will never be right.

Let’s look at the mechanics of converting an Estimate to a RO. First bring up the ESTIMATE and review it to make sure it is correct. If satisfied, then press “F8”. CC3 will pick the next RO# and show you this number. If you accept this number assignment, then press “ENTER”. When you have this screen showing, be sure to move on rapidly because you have everybody else locked out of the conversion utility. Two people cannot bridge at the same exact time.



CC3 MAIN MENU, Ph: 360-582-0202, www.softwarehero.com, - Version 1.02

EST #1314

Name EMS1 TEST FILE RO # Estimate # 1314
 Lst/Frst
 Address 123 MAIN ST. Estimator SUPERVISOR
 City/Zip SOMETOWN, CA 99999 PntCode BLUE Rate
 Hphone 6265551212 1234 Agent Mileage 87535
 Wphone 6265551234 Policy # 1234567890 EstDate 10/01/98
 E-Mail Appoint //
 Lic 1A Year 89 Model AC Ins Co CC Ins Adrs Ins City Ins Ph. 626 Adjuster JO Claimant JOE ADJUSTER, A/R # Resale N
 Adj Adrs Adj City Adj Ph. Ad Email Status F1-Towed In F2-Total Loss F3-Preorder par F4-Write Sheet Enter F5-Total Loss F6-123456789C F7-123456789C F8-123456789C .002L
 Notes NO NOTES AVAILABLE

Est to RO Date/Status Box

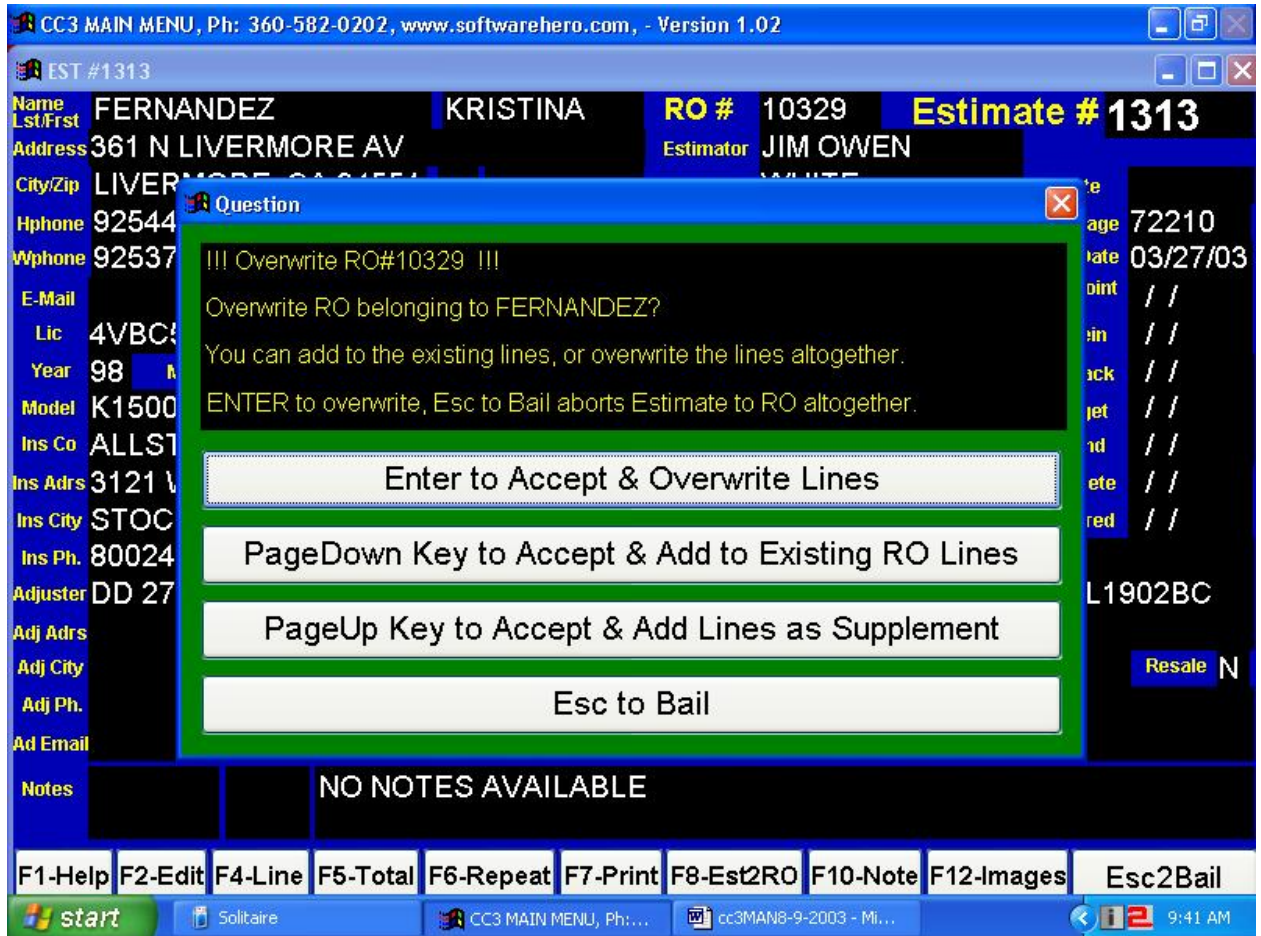
RO# 10332 Date In 08/29/03 Target Date 08/29/03 Detail % 0

F1-Help F2-Edit F4-Line F5-Total F6-Repeat F7-Print F8-Est2RO F10-Note F12-Images Esc2Bail

start Solitaire CC3 MAIN MENU, Ph: ... cc3MAN8-9-2003 - Mi... 9:38 AM

Then you'll be prompted for DATE IN, , and TARGET DATE. During conversion is the only time you may assign or change a TARGET DATE. This kind of keeps people honest. The other item of real importance on this screen is the DETAIL ADJUSTMENT. If your shop uses this feature, then during conversion is where you should take the 1 to 9 percent Detail Adjustment. The final item on this screen is the STATUS. This is not terribly important except to indicate that the car is here, Go to work. You can edit or change the Detail Adjustment in the "F6-Closeout, then in Close Out J-Jobcost".

You have now created a RO in CC3 and can go right ahead working in the RO if desired.



Chapter 9, "Working with the Repair Order (RO) in CC3"

As you look over the REPAIR ORDERS of the MAIN MENU, you'll see that a RO can be pulled up lots of different ways. The most common and quickest are the first two options, "ROs In Progress" and "RO Number Recall".

The REPAIR ORDER Screens are almost identical to those on the Estimate side; but each option seems to opens doors to other options. Here's an RO