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

HEADER.

Let's do a little role playing.

> You have just completed an Estimate in your Estimating package, BRIDGED the Estimate to CC3 where ESTIMATE # 8339 was created in CC3. You've verified the totals in the CC3 ESTIMATE, converted the ESTIMATE to a RO and CC3 assigned a RO # 21098. Your now sitting at the RO HEADER Screen, what do you do next?

Your customer is leaving their vehicle with you, so it seem logical that they would want a copy of the RO showing what you are going to be doing to their car. You may print them a copy of the RO by pressing (**F7**). Wow, look at all those print options.

In most cases, you'd take the simple way and press **ENTER** depending on how many copies of the "standard format RO" you wanted to print. As soon as one came out of the printer, I'd give it to the customer to review and immediately press (**F7**) again. This time I'd press (**A**) to print an AUTHORIZATION Agreement for the customer to sign before the leave. (NOTE: Many shops combine the Work Authorization and the Power of Attorney on the same sheet, but have two places to sign. The Authorization portion is signed when they drop off the vehicle and the Power of Attorney portion is signed when they pick up their vehicle. There are 2 forms of authorization actually and you set them up under SETUP/SHOP from the Main Menu. The (A) you see from the print menu prints a whole sheet for the customer to sign. Most shops however like to tack a small paragraph at the bottom of the RO and use that as their authorization.

You're probably wondering what all those other Print Options do, so we'll pause briefly and quickly cover the other Print Options:

R, causes a "Detailed RO" to be printed. Insurance adjusters and others in the know may prefer the "Detailed RO" over the "Standard RO" in that it shows the Estimated Amount and the RO Amount for each line and the Difference between the two if any. There are a lot more numbers on the detailed RO, the totals equals the same for Standard or Detailed RO.

C, causes you to be prompted for the identity of the "Custom RO" that you wish to print. CC3 allows you to place special markers on Line of the RO and thus treat these lines separately. The markers are placed in the 'Supplement' column of the RO just to the left of estimated amount. You get to those columns by using the TAB key to back into them while on that line. As an example, say you have a line that "Customer Pay" you could place a "C" marker on that line and then by specifying "C" as the

custom form, print out a RO with just the one "Customer Pay" line. This feature also works for "Supplements" where the Insurance Company wants them all broken out. Specifically you may have supplements 1,2,3 as well as a supplement lines you mark as 'P' for price changes only. You can also access these custom supplements and RO s through F10 of the lines of the RO. Note that the custom code 'B' is used for betterment's, 'Appearance allowance. If lines are tagged with 'A' and 'B' they will appropriately adjust the 'Customer Pay' amount printed at the bottom of an RO.

SUPPLEMENT LINE CODE TYPES FROM RO LINES:

A - APPEARANCE ALLOWANCE

B - BETTERMENT

C - CUSTOMER PAY

P - PART PRICE INCREASE

1,2,3,4 - MULTIBLE SUPPLEMENTS

W, will cause a "Generic Work Order to be printed; however if you're assigning labor through our Work Order Screen, you'll want to print from that screen rather than here.

P, will cause a "Generic Parts Order to be printed; however if you're using CC3's powerful Parts Ordering & Tracking System, then we'd recommend that you do your Parts Order Print from there rather than here.

A, causes an AUTHORIZATION Agreement to be printed. If your shop is not currently using one, then we'd highly encourage you to start. This Authorization can be modified to fit your own needs via the SETUP/SHOP; but just remember that changes are "system wide" rather than "users specific". A brief power of attorney and authorization can be setup to print at the bottom of the RO also, which may eliminate the need to use the fullpage authorization printout. You do not have to use the (A)uthorization if you would simply use a brief paragraph at the bottom of an RO rather than a full page. A brief paragraph can also be placed at the bottom of all supplements for Power of Attorney. Set these brief statements up in SETUP/SHOP also. The choice of how to handle authorizations is yours.

Power Of Attorney

OK To Tear Down

Parts Order (Generic)

Work Order (Generic)

N, PRINT NOTATION, will cause the "NOTES" for this RO to be printed. As you'll soon learn, CC3 has a very powerful NOTATION FILE attached to every RO. Some entries are automatic, while others are created by you. This is where you keep notes on everybody you talked with regarding this job. Each entry is Date/Time stamped and therefore offers an excellent audit trail of what went on with the job. You can also print just the notation for a particular vendor or insurance company, so in some DRP situations you may want to enter the letters say 'INS' for the VEN column when you enter

79

notation, you can just print the notes for 'INS' and not give the insurance company access to all the notes, just the notes meant for them. That we can just have INSURANCE NOTATION time and date stamped.

S, will cause a Supplement to be printed. This is very similar to the "Standard RO"; but will only show "Supplemental Items".

I, will cause a Supplement to be printed with information covering price change lines only. When you press 'E' the system with ask you whether you want to tag those lines as its own supplement. In other words the price change lines might be their own supplement different from other supplements. Once you've printed this parts price supplement, the system will automatically place 'P' in the supplement column of the lines effected by parts price increase.

D, will cause a Detailed Supplement to be printed showing EST, RO, and Chg. on each line. When submitting this document to substantiate a claim, there is little doubt as to what created the supplement.

V, will print a cover sheet you can use this on the vehicle as a tag or cover your RO jacket with complete legible information.

B, will cause a "Bill" to be printed for mailing showing basically RO# and Amount Owed. It is ready to be folded to fit a standard windowed envelope. The bill will automatically add up your supplements (multiple supplements 1,2,3 and parts 'P' price increase supplements) as well as appearance allowances, betterment's, and deductible to try to assemble a final bill for the insurance company. The only way for you to truly feel comfortable with how this bill is brought together is for you to play with the lines of the RO, and the codes that have been described above in (C)ustom RO. This bill is possibly the most complicated issue in the entire management system. It's designed to operated and look easy, but it can be a very powerful and challenging document. If dealt with correctly, it could be considered the most important document in the entire system as it will clarify for the insurance company everything, and therefore leave an important good impression in their mind that you know what you are doing, and that their job is easier because you do. Note that the screen below did not get updated before printing and this screen will also show the difference between the total RO, the customer portion, and the insurance portion.

CC3 Offers a complete List for you to Print, Fax, or email (via Outlook) with attachments or imbedded in your email.

What's next, you've got the keys in hand and the vehicle out in the drive? In some shops, your job as an Estimator is done. But in other shops, your job has just begun. Either way, every Estimator should review the rest of this Chapter.

As you already know, the RO is the record of everything that is done to the vehicle, so let's dig in a little more and find out more about the RO.

This is that ever familiar RO HEADER.

As we look at the RO HEADER again, you'll see a number of options beyond the F7 option that we used to print the RO and Authorization. Let's look at these:

F1, bring up the HELP Screen. The content of this screen changes depending on where you are in the program.

F2, put you into an edit mode to where you can edit most items in the RO HEADER.

F4, will cause the LINES of the RO to be displayed.

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

RO Line Items

RO# 10328   Name FERNANDEZ   Car 98 CHEV   K1500 4X4 SUBURBAN L

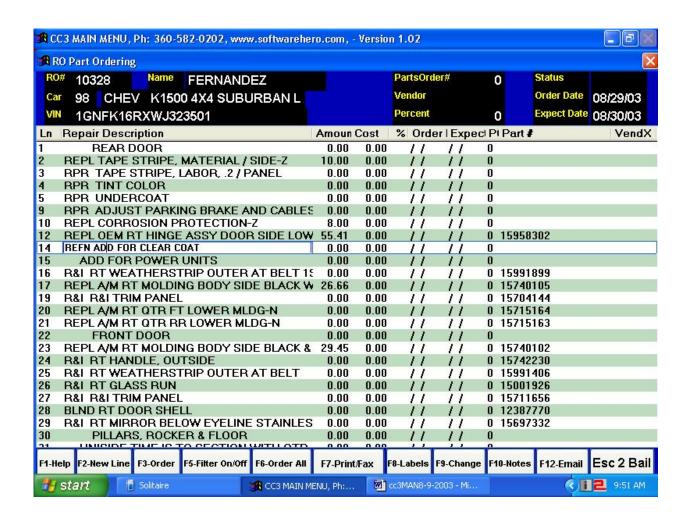| Repair Description	Est Amt	RO Amt	E Hours	Hours	E Paint	Paint	Su
REAR DOOR	0.00	0.00	0.0	0.0	0.0	0.0	
REPL TAPE STRIPE, MATERIAL / SIDE-Z	10.00	10.00	0.0	0.0	0.0	0.0	
RPR TAPE STRIPE, LABOR, .2 / PANEL	0.00	0.00	0.4	0.4	0.0	0.0	
RPR TINT COLOR	0.00	0.00	0.5	0.5	0.0	0.0	
RPR UNDERCOAT	0.00	0.00	0.2	0.2	0.0	0.0	
RPR ADJUST PARKING BRAKE AND CABLES	0.00	0.00	0.3	0.3	0.0	0.0	
REPL CORROSION PROTECTION-Z	8.00	8.00	0.2	0.2	0.0	0.0	
REPL OEM RT HINGE ASSY DOOR SIDE LOWER	55.41	55.41	0.3	0.3	0.3	0.3	
REFN ADD FOR CLEAR COAT	0.00	0.00	0.0	0.0	1.4	1.4	
ADD FOR POWER UNITS	0.00	0.00	0.4	0.4	0.0	0.0	
R&I RT WEATHERSTRIP OUTER AT BELT 1ST DE	0.00	0.00	0.0	0.0	0.0	0.0	
REPL A/M RT MOLDING BODY SIDE BLACK W/CHR-N	26.66	26.66	0.3	0.3	0.0	0.0	
R&I R&I TRIM PANEL	0.00	0.00	0.0	0.0	0.0	0.0	
REPL A/M RT QTR FT LOWER MLDG-N	0.00	0.00	0.0	0.0	0.0	0.0	
REPL A/M RT QTR RR LOWER MLDG-N	0.00	0.00	0.3	0.3	0.0	0.0	
FRONT DOOR	0.00	0.00	0.0	0.0	0.0	0.0	
REPL A/M RT MOLDING BODY SIDE BLACK & CHR-N	29.45	29.45	0.3	0.3	0.0	0.0	
R&I RT HANDLE, OUTSIDE	0.00	0.00	0.4	0.4	0.0	0.0	
R&I RT WEATHERSTRIP OUTER AT BELT	0.00	0.00	0.3	0.3	0.0	0.0	
R&I RT GLASS RUN	0.00	0.00	0.3	0.3	0.0	0.0	
R&I R&I TRIM PANEL	0.00	0.00	0.4	0.4	0.0	0.0	
BLND RT DOOR SHELL	0.00	0.00	0.0	0.0	1.4	1.4	
R&I RT MIRROR BELOW EYELINE STAINLESS ST	0.00	0.00	0.5	0.5	0.0	0.0	
PILLARS, ROCKER & FLOOR	0.00	0.00	0.0	0.0	0.0	0.0	
UNISIDE TIME IS TO SECTION WITH QTR	0.00	0.00	0.0	0.0	0.0	0.0	
REPL OEM RT UNISIDE LOCK PILLAR	815.27	815.27	6.0	6.0	1.0	1.0	

F1-Help | F2-Work Order | F3-Head | F4-Parts | F5-Total | F8-Jobcost | F9-Del | F11-Add | Esc

start | Solitaire | CC3 MAIN MENU, Ph:... | cc3MAN8-9-2003 - Mi... | 9:49 AM
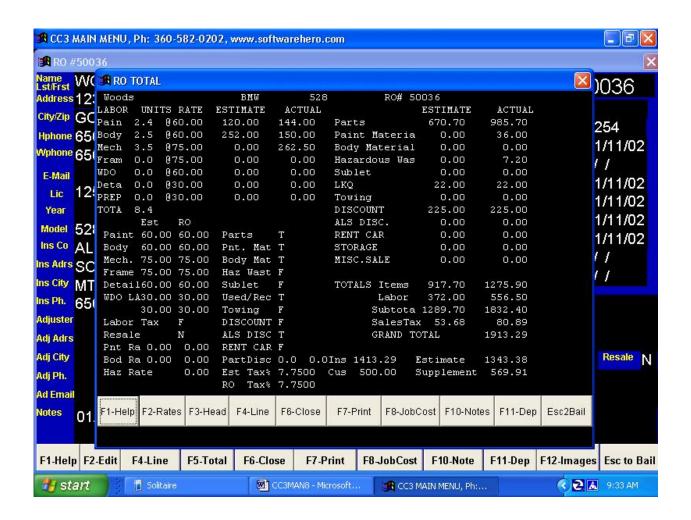
If you press F4 a second time, you'd wind up in the PARTS Tracking Screen.

And if you pressed F4 a third time, you'd wind up in the PARTS ORDER Screen.

F5, will bring up a TOTALS Screen. This is like the Totals Screen in the ESTIMATE and is a quick overview of the job.
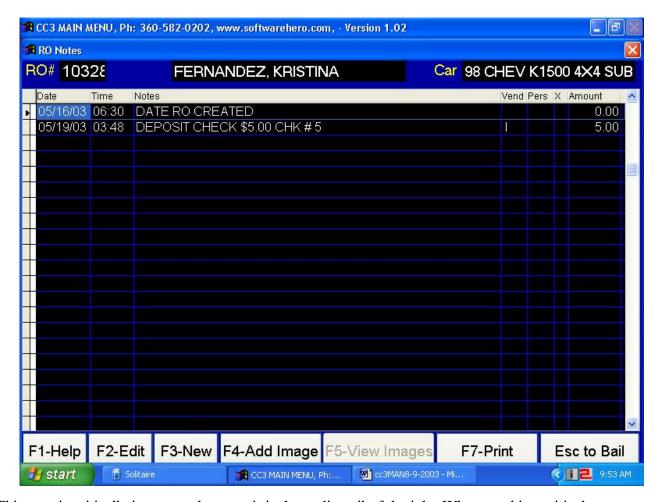
F6, will bring up the CLOSE OUT Screen. This is one of the most powerful and far reaching screen in CC3. This screen looks similar to a number of other screens in CC3, but is drastically different. We'll spend a lot of time covering this screen in SECTION V, "The General Manager", Chapter 19, "Closing Repair Orders".

G/L	Acct #	Sales	Cost	Profit	Prof %	Hours /	Posted
Paint	501	644.10	0.00	644.10	**.*	11.3	0.0
Body	502	2798.70	0.00	2798.70	** *	49.1	0.0
Mech.	503	0.00	0.00	0.00	0.0	0.0	0.0
Frame	504	57.00	0.00	57.00	**.*	1.0	0.0
Glass	505	0.00	0.00	0.00	0.0	0.0	0.0
Detail	506	0.00	0.00	0.00	0.0	0.0	0.0
Other	507	0.00	0.00	0.00	0.0	0.0	0.0
Labor Total		3499.80	0.00	3499.80	**.*	61.4	0.0
Parts	551	1746.57	0.00	1746.57	**.*		
P Mat	552	271.20	176.28	94.92	35.0		
B Mat	553	0.00	0.00	0.00	0.0		
Haz Wst	554	0.00	0.00	0.00	0.0		
Sublet	555	89.95	0.00	89.95	**.*		
LKQ	556	2437.50	200.00	2237.50	91.7		
Towing	557	45.00	0.00	45.00	**.*		
A/M	558	723.72	0.00	723.72	**.*		
STORAG	559	0.00	0.00	0.00	0.0		
RENTAL	560	0.00	0.00	0.00	**.*		
MiscTxd	561	53.37	0.00	53.37	**.*		
MiscNTx	562	0.00	0.00	0.00	0.0		
Items Total		5367.31	376.28	4991.03	92.9		
Subtotal		8867.11	376.28	8490.83	95.7	< Gross Profit	

Subtotal 8867.11
Sales Tax 431.67
GrandTotal 9298.78
Deposits 5.00
Receivable 9293.78

Deductible 500.00
Post Date 08/29/03

RO# 10328

FERNANDE
98 CHEVR
K1500 4X4 S

(C)loseout
(D)eposits (N)otation
D(A)tePost (J)obcost
Part(R)econ pr(I)nt All
(P)rint #17 Esc2Bail

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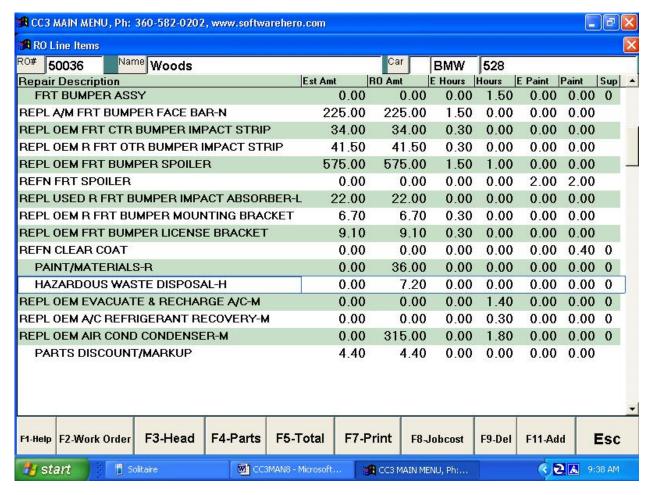**F7**, displays the PRINT OPTIONS which we have already covered.

F8, displays JOB COSTING Information. Through this screen you can see every hour of labor posted, every parts invoice posted, and every dollar received against the RO.

F10, brings up that tremendous "Notations Screen".

This area is critically important because it is the audit trail of the job. When anything critical occurs to the RO, like deposit is posted, or RO is overwritten, a time and date stamp of the activity is automatically created. If a Master Password is used, there is no way to delete these comments. An audit report is also available in accounting to review these types of notation notes at the end of the month. From left to right you'll see the body of the note (approx. 50 characters), next you'll see an area for the name (Initials) of the person making the note, next you see an area to indicate if this note regarded a VENDOR and if so their Code should be put here, and last a column identified as "P". This column controls the printing of this line of notation.

As you probably already know, most shops look at costs and profits by department. A shop could be making a "bundle" in the Paint Department, but losing a "bundle" in the Body Department. Looking at Departmental information is becoming more important everyday, so let's see how the Lines of an RO effect this important process. Virtually every line of a RO have some type of "charges" attached to it. ---Remember back in the ESTIMATE when we talked about directing "SALES DOLLARS" via DASH CODES; well now it's time to direct "COST DOLLARS" via DASH CODES. Normally the Dash Code established in the Estimate is the same Dash Code utilized in the RO, so no changes are normally needed here; however if you did need to make a DASH CODE change, don't forget the "speed keys" utilized to make the change. Highlight the line to change, press "**END**" and insert or change the dash code.

You'll note that this screen looks almost identical to the LINES Screen of the ESTIMATE, but as you study it, you'll see more options as to what you can do from here.

F1, bring up a HELP Screen for the RO LINES. DASH Codes are covered here.

F2, brings up the WORK ORDER Screen allowing you to assign, change assignments, and print WORK ORDERS.

F3, will put you back into the HEADER of the RO.

F4, will put you into the PARTS LISTING Screen.

F5, will bring up the TOTALS Screen for a quick overview of the job.

F6, will bring up the CLOSE OUT Screen, the systems most important screen.

F7, is the PRINT Options.

F8, is the JOB COSTS Screen.

F9, is the "DELETE LINE KEY" and will delete the "highlighted line".

F11, is the "ADD LINE KEY" and will add/insert a LINE to the RO at your current cursor position. This key could also be called the "undelete key" in-that if you had accidentally erased a line and immediately realized what you had done, this key gives you the capability of re-inserting the line just erased. (*NOTE: Try to avoid using the "insert" capability on large RO's as this is probably the slowest process in CC3.*)

Shift-F2 allows you to delete all the lines in an RO.

The RO lines screen is a fairly simple screen until you want to really tap the supplement and RO balancing power of the system. You can alter estimated amounts in the RO for reason of balancing, this will only change the estimated amounts here in the RO and does not reach back over to the original estimate and change values there, which is what you want. You may have forgotten to put the tow bill

 on the original Estimate, but don't want it to show up as a supplement, no problem being able to edit the est-amount will allow no supplement. To change estimated amounts & hours, use the TAB key to back up into the column you want to change. That is easy enough. The 2 columns to the left of Est-Amount are Est-Code and Supplement. In the case of the forgotten tow bill that maybe you don't want to show as a supplement, would be entered "TOWING -T" with an estimate amount of $100 and an RO amount of $100. The problem is that entered like this the '-T' will only apply to the RO amount not the estimate amount. In the totals screen the estimated parts will be overstated by $100, the estimated towing at $0, RO towing for $100, and RO parts the correct amount without the $100 for towing. To affect the estimated amount you must place a 'T' in the Est-Code. Therefore, in another example, the system would allow you to estimate body time by having no code in the Est-Code column, but by placing a '-M' at the end of the line, supplement to mechanical labor for that line. A little tricky, but very powerful!

Supplement Line codes allows you to separate out, on a line-by-line basis, parts of the RO that should be billed in unique ways. The lines need not be supplement lines either. In the case of a customer pay, "I'll pay you a couple extra bucks to go ahead and buff out those scratches on the left hand side of the car while the accident only effected the right hand side." That would not necessarily be a supplement, but you certainly don't want that to show up on the insurance company bill. You don't want to open up a 2nd RO either, as that creates its own problems.

SUPPLEMENT LINE CODE TYPES FROM RO LINES:

A - APPEARANCE ALLOWANCE

B - BETTERMENT

C - CUSTOMER PAY

P - PART PRICE INCREASE

1,2,3,4 - MULTIPLE SUPPLEMENTS

Take the case of a simple RO the insurance company will pay for, but the customer wants little additional work he will pay for. The lines the customer is paying for will have a 'C' under the supplement column. If you hit F7 and print your typical RO, all lines will be printed together along together with the total including insurance and customer portions. However, if after hitting F7 you choose (C)ustom, you can enter a 'C' and the only lines and totals to print will be those of the customer is paying himself. F7, (C)ustom again, and enter a blank for the custom code, and only the lines and total with a blank in the supplement column will print, meaning the lines the insurer is paying will print. As the payments come in from the customer and the insurer are post to the RO, from the Main Menu, everything washes out beautifully.

More complicated now: multiple supplement, parts price increase, betterment, allowance, and customer pay. First the parts price increase; you would go into F7 print and choose (E) for parts price increase. System will ask you for a code and you want the 'P' so you can hit enter. System will find all the parts price increases and tag them automatically in the supplement column with a 'P'. As you are generating your supplements, or they are coming in electronically through the bridge, you will tag them with 1,2,3, or 4, so a group of lines

89

representing a supplement will all have a '2' by them say. If you are allocating labor in the Work Order, you can distribute the labor for that newly entered supplement through the F10 supplement key as well as quick check the total for balancing purpose of that supplement through the F10 key. Betterment lines need a 'B' by them, Allowance lines an 'A' and there you are - You can generate the copies of the RO s and supplement you need for everyone as well as use the (B) ill to bring it altogether. This is surely complicated and we know of no way to make it simpler. The only way you will understand it fully it to play with it yourself, make a change to one line then take a look at how it changed the Bill, back and forth until you get it. Good luck! We know you will love this once you have it wired!

Doing all of this will allow you to print a final RO for the customer and at the bottom Insurance Pay will equal Original Estimate+Appearance-Betterment-Deductible-Customer Pay Lines. Customer Pay will equal Deductible-Appearance Allowance+Betterment+Customer pay lines.