

REPAIR CENTER CLOSING

- Open Repair Center and search for the RO:
 - Ensure that the dollar amount of the claim matches between Mitchell Connect and Repair Center.
 - Check that any supplements have been finalized.
 - Move through the tabs to ensure all discrepancies on the RO are cleared/accounted for.
- Admin & Vehicle Tab:
 - All customer information in entered.
 - Mileage is updated.
 - Payer is allocated to either "Customer" or "Insurance" depending on who the primary payer is.
 - Insurance Office properly reflects the types of claim (Example, the correct insurance company is selected, or CUSTOMER PAY, or WARRANTY, etc.).
 - Deductible status has been updated according to Mitchell Connect.
- Dates Tab:
 - All dates are entered.
- Repair Tab:
 - Any manual customer pay items entered.
- Parts Tab:
 - All parts are posted.
 - Any items are marked as inventory accordingly.
 - Credits are posted (if a credit has not been received you can still proceed with closing).
- Sublet Tab:
 - Double check Repair tab/Labour tab and convert any necessary lines to Sublet (check Mech times).
 - All sublets are posted.
- Labour Tab:
 - All labour lines are assigned.
 - Flat rate hours have been flagged.
 - Hourly employees are not clocked into the job.
- Attachments Tab:
 - Signed FRA is attached.
 - Parts/sublet invoices attached.
 - Repair procedures are attached.
 - Pre/post scans are attached.
 - Any email communications regarding payment/supplement confirmations.
- Payments Tab:
 - GST/PST responsibility is reflecting the claim.
 - Invoice (if fleet vehicle) is printed and sent with vehicle/emailed for payment.
 - Invoice with supporting documents has been emailed to the adjuster if out of province insurance provider.
 - Payments have been posted.
- Print and staple the following reports:
 - Report #178 "RO Detail – Classic" signed by manager.
 - Final estimate from Mitchell Connect.
 - Final Invoice from Repair Center.
- Manager has signed off on final profit percentage.

STOP HERE IF YOU ARE ONLY PRE-CLOSING – ANYTHING PAST THIS POINT CANNOT BE UNDONE.

- ENSURE YOUR DATES ARE CORRECT FOR THE CURRENT CLOSING MONTH BEFORE FINALIZING:
 - Transfer the job from the "Sales" tab under the "Accounting" drop down menu.
 - Hit "Close Job" button.