

# Date Management – Repair Center

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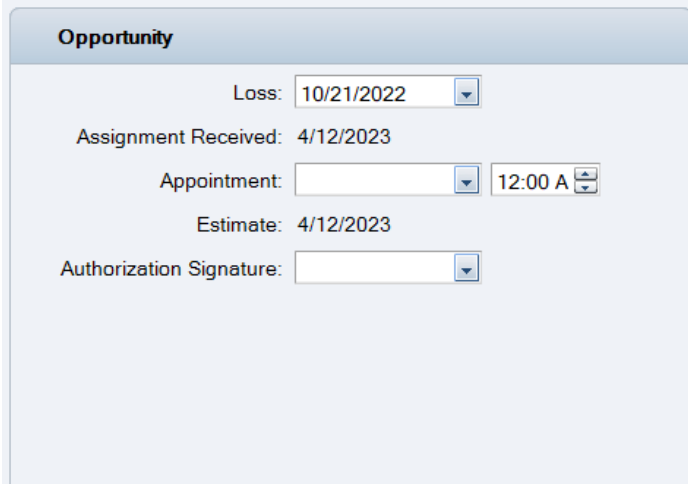
# Date Management – Repair Center

## Section Review

Under the “Dates” tab in repair center, there are 3 main sections of the page.

### Opportunity

Includes dates related to the estimate.



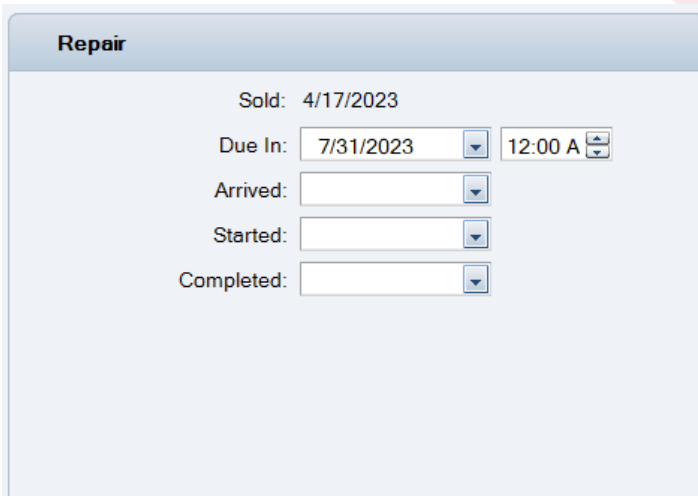
The screenshot shows a form titled "Opportunity" with the following fields:

- Loss: 10/21/2022 (dropdown menu)
- Assignment Received: 4/12/2023
- Appointment: (dropdown menu) 12:00 A (time dropdown menu)
- Estimate: 4/12/2023
- Authorization Signature: (dropdown menu)

- “Loss” – The date the vehicle was damaged.
- “Assignment Received” – The date the assignment is received.
- “Appointment” – The date/time of the customer's appointment with the estimator to write an estimate.
- “Estimate” – The date the estimate is created (automatically generated).
- “Authorization Signature” – The date the customer signs the work authorization form.

### Repair

Includes dates related to the repair process.



The screenshot shows a form titled "Repair" with the following fields:

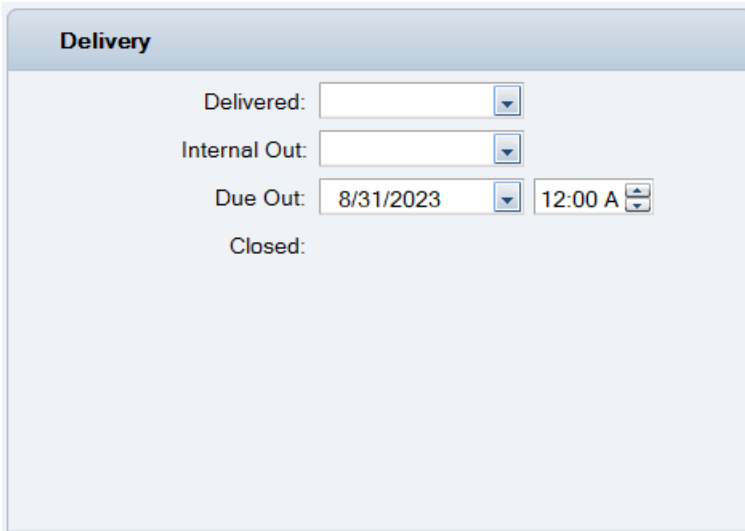
- Sold: 4/17/2023
- Due In: 7/31/2023 (dropdown menu) 12:00 A (time dropdown menu)
- Arrived: (dropdown menu)
- Started: (dropdown menu)
- Completed: (dropdown menu)

- “Sold” - The date the RO is created.
- “Due In” - The date/time the vehicle is scheduled to arrive at the shop for repair.
- “Arrived” - The date the vehicle arrives at the shop for repair.
- “Started” - The date work on the vehicle begins.
- “Completed” - The date the vehicle is ready to be delivered to the customer.

# Date Management – Repair Center

## Delivery

Includes dates related to the delivery of the repaired vehicle.



The screenshot shows a form titled "Delivery" with the following fields:

- Delivered: [Dropdown menu]
- Internal Out: [Dropdown menu]
- Due Out: [Date field: 8/31/2023] [Time field: 12:00 A]
- Closed: [Empty field]

- “Delivered” - The date the vehicle is returned to the customer.
- “Internal Out” - An internal date of your choice. This can be your target date to return the vehicle to the customer, for example.
- “Due Out” - Date and time the vehicle is scheduled to be returned to the customer.
- “Closed” - The date the repair order is closed. It is automatically set when the repair order is closed in accounting.

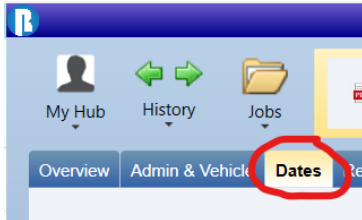
# Date Management – Repair Center

## How Do We Manage Dates?

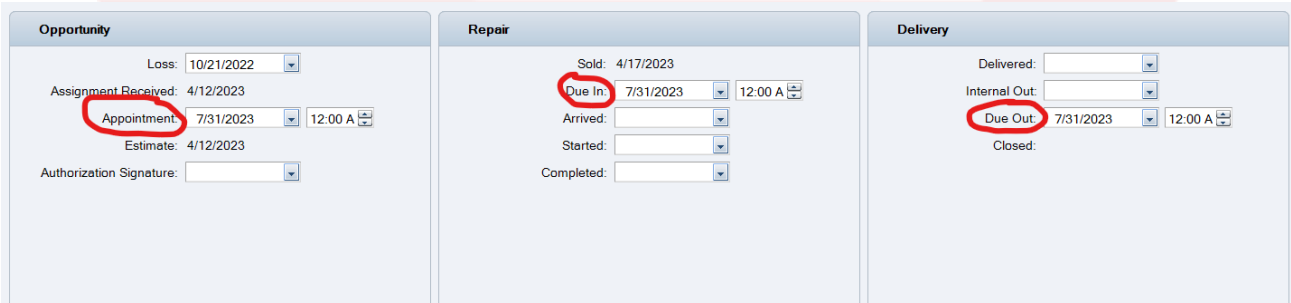
Managing the dates for a job ensures that we can accurately track monthly sales. All shops have a monthly budget they must hit, so date management will allow us to see if you are on track or not. Date management starts as soon as an RO is created.

### For Estimate Appointments

1. Open the RO and navigate to the “Dates” tab.



2. Change the “Appointment”, “Due In” and “Due Out” dates to reflect the date the customer will be coming in.

A screenshot of the software interface showing three tabs: 'Opportunity', 'Repair', and 'Delivery'. The 'Opportunity' tab has fields for 'Loss' (10/21/2022), 'Assignment Received' (4/12/2023), 'Appointment' (7/31/2023, 12:00 A), and 'Estimate' (4/12/2023). The 'Repair' tab has fields for 'Sold' (4/17/2023), 'Due In' (7/31/2023, 12:00 A), 'Arrived', 'Started', and 'Completed'. The 'Delivery' tab has fields for 'Delivered', 'Internal Out', 'Due Out' (7/31/2023, 12:00 A), and 'Closed'. The 'Appointment', 'Due In', and 'Due Out' fields are highlighted with red circles.

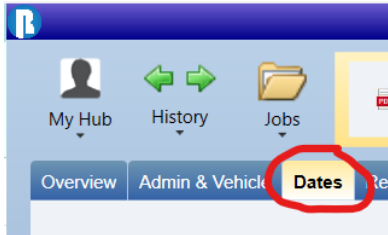
3. Hit the “Update” button.

# Date Management – Repair Center

For Un-scheduled Repair Appointments

This process is for ROs that do not yet have a schedule date for repairs. This delay can be due to parts delays, or by customer choice.

1. Open the RO and navigate to the “Dates” tab.



2. Change the “Due In” and “Due Out” dates to the last day of the last month of the fiscal year.

A screenshot of the software interface showing two panels: 'Repair' and 'Delivery'. In the 'Repair' panel, the 'Due In' field is set to '10/31/2024' and is circled in red. In the 'Delivery' panel, the 'Due Out' field is set to '10/31/2024' and is also circled in red. Other fields include 'Sold: 12/7/2023', 'Delivered:', 'Internal Out:', and 'Closed:'.

**NOTE:** The total dollar amount being held at the end of the fiscal year will be monitored monthly via the “OPEN ROS REPORT”. If the total amount accumulated is greater than 2.5 times your monthly budget, we will investigate why jobs are not being put through the system.

Example:

The monthly budget of your shop is \$100,000.00.

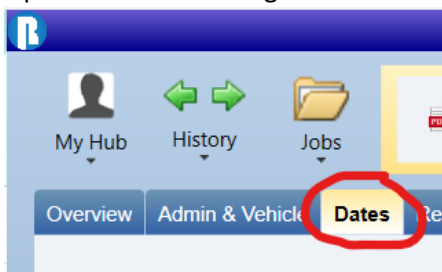
If the OPEN RO REPORT shows a total of \$250,000.00 or more we will look into it.

# Date Management – Repair Center

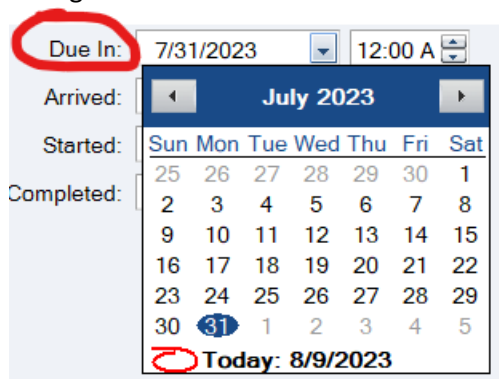
For Scheduled Repair Appointments

This process is for ROs that have been scheduled for repairs.

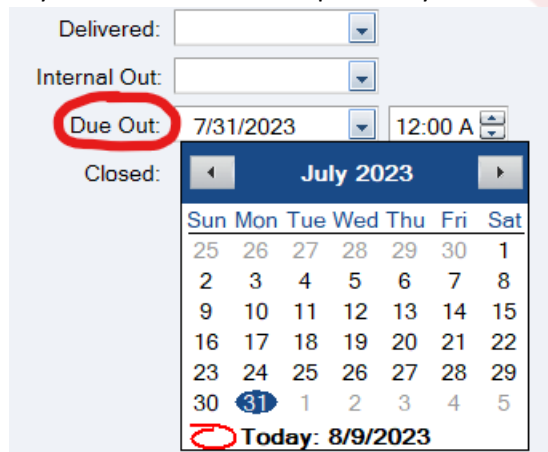
1. Open the RO and navigate to the “Dates” tab.



2. Change the “Due In” date to reflect the date of the scheduled appointment.



3. Change the “Due Out” date to reflect the estimated date of repair completion. Note: This date can be changed a any time to account for repair delays.



4. Make sure that the “Arrived” and “Started” dates are updated once the vehicle comes in.

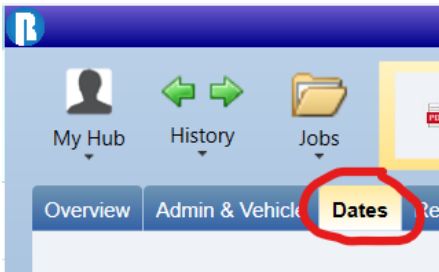


# Date Management – Repair Center

Once Repairs are Completed.

Once a vehicle has been delivered you must ensure dates are updated.

1. Open the RO and navigate to the “Dates” tab.



2. Change the “Completed” and “Delivered” dates to reflect the dates the job was done and returned to the customer. Note: these dates may be different!

Repair	Delivery
Sold: 4/17/2023	Delivered: <input type="text"/>
Due In: 7/31/2023 12:00 A	Internal Out: <input type="text"/>
Arrived: <input type="text"/>	Due Out: 7/31/2023 12:00 A
Started: <input type="text"/>	Closed: <input type="text"/>
Completed: <input type="text"/>	