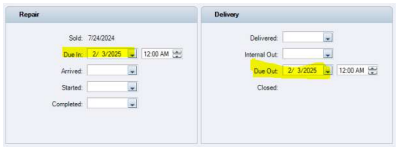
DATE MANAGEMENT 101

DR or Estimate

Due In Date and Due Out dates reflect the date of the estimate appointment.

Example - Customer is booked for a appointment on Feb 3 for an estimate.

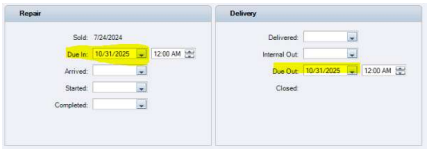


DATE CHANGES

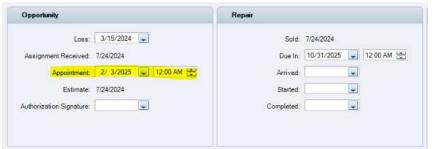
Pending a Appointment/New Claims

Due In Date and Due Out dates reflect the last day of the fiscal year (October 31)

Example - Customer is pending parts so no repair appointment is set yet.



Change the estimate appointment date to reflect the original estimate appointment.



DATE CHANGES

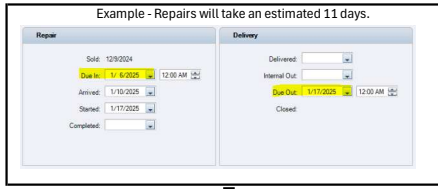
Repair/Drop Off Appointment

Due In Date reflects the date the customer will be dropping off the vehicle for repairs. Due Out date is best guess as to when repairs will be done.

Arrived date to be updated when vehicle arrives.

Started date to be updated when job handed to a technician. Commonly done at the same time as the Arrived date.

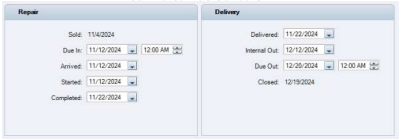
Example - Repairs will take an estimated 11 days.



Note: Due Out date indicates which month the sale will be captured in. If a job is not going to be delivered by the end of the month, the due out date must be changed to the next month!

DATE CHANGES

Repairs Complete

Completed and Delivered dates to be updated. Due Out date can be changed to match.

Example - Vehicle was completed and returned to customer ahead of the estimated Due Out date.