

Checklists - Adding Estimate Lines

Introduction

Estimate lines can be added to an estimate with a repair plan attached, changes made to the estimate will be reflected in the Checklist when the repair plan is recalculated.

Adding Estimate Lines

Additional lines can be added to the estimate from the Estimate tab in two ways:

Item	Action
1	Enter line item(s) Manually.
2	Select line items from the section(s) below.
3	After estimate line items have been entered click Save .

In this example, frame labor is added manually indicated with an "F" in the column next to the labor hours, this indicates the type of labor (See Item 1). This will add a **Structural/Frame** Checklist item.

The screenshot shows the software interface for adding estimate lines. The main window displays the 'Estimate' tab with a table of lines. Line 13 is highlighted, showing 'frame labor' with 1.5 hours and a type of 'F'. A 'Save' button is highlighted in the top left. A parts selection window is open, showing a list of parts under 'FRONT LAMPS' and 'HEADLAMP COMPONENTS 2011-13 W/O M3'. The 'Headlamp housing' part is selected, and its details are shown in the table below. A diagram of the headlamp assembly is visible on the right.

Lines	Other Charges	Totals										
\$4,363.36 over threshold Preliminary Estimate												
A	N	O	Est	Line	Oper	Description	Qty	Price	Est. Price	Labor	Paint	
		<input type="checkbox"/>		6		Add for distance sens	0	0.00	0.00	m	0.4	0.0
		<input type="checkbox"/>		7		Aim distance sensor	0	0.00	0.00	m	1.0	0.0
		<input type="checkbox"/>		8		Add for spoiler	0	0.00	0.00		0.7	0.0
		<input type="checkbox"/>		9		FRONT LAMPS	0	0.00	0.00		0.0	0.0
		<input type="checkbox"/>		10	Repl	RT Headlamp housing	1	1,397.58	1,397.58		1.0	0.0
		<input type="checkbox"/>		11		Aim headlamps	0	0.00	0.00		0.5	0.0
		<input type="checkbox"/>		12	Repl	LT Headlamp housing	1	1,397.58	1,397.58		1.0	0.0
		<input type="checkbox"/>		13	#	frame labor	1	0.00	0.00		1.5	F 0.0

Description	#	L/R	Year	Price	Labor	Paint
FRONT LAMPS						
HEADLAMP COMPONENTS 2011-13 W/O M3						
Headlamp housing	1	R	11-13	1397.58		1.0
Headlamp housing	1	L	11-13	1397.58		L.0
Headlamp housing screw	2	R	11-13	2.54		
Headlamp housing screw	2	L	11-13	2.54		
Headlamp housing nut	3	R		.11		
Headlamp housing nut	3	L		.11		
Headlamp housing gasket	4	R		.65		

Continued on next page

Checklists - Adding Estimate Lines, Continued

Recalculate Repair Plan

Once additional estimate lines have been added, return to the **Repair Plan** tab, and select **Recalculate**. The Checklist items and repair schedule will be updated to reflect the changes.

The screenshot displays the 'Repair Plan' tab in a software application. The top navigation bar includes 'Contacts', 'Insurance', 'Inspection', 'Rental', 'Vehicle', 'Estimate', 'Rates', 'Attachments', 'Performance', 'Labor', 'Parts', 'Receipts', 'Repair Plan', 'Total Loss', and 'Notes'. The 'Repair Plan' tab is active, showing a 'Schedule' section with 'Vehicle In:' (Original: 03/06/2017 7:00 AM, Revised: 03/06/2017 7:00 AM), 'Repairs Started:' (03/06/2017), 'Repairs Completed:' (03/08/2017), and 'Promise / Vehicle Out:' (4:00 PM). Below the schedule is a calendar view for the week of 3/3 to 3/16, with '04 Body' and '06 Re' highlighted. The 'Phase Details' section includes a 'Recalculate' button. A table below lists repair phases with columns for 'IO hrs', 'Burn Rate', 'Start', 'Finish', 'Production Hours', and 'Duration Days'.

Repair Phase	IO hrs	Burn Rate	Start	Finish	Production Hours	Duration Days
00 Vehicle Check	--	--	3/6/2017 7:00 AM	3/6/2017 8:00 AM	1.0	0.1
04 Body	6.0	5.0	3/6/2017 8:00 AM	3/6/2017 5:36 PM	9.6	0.9
06 Refinish/Paint	4.2	5.0	3/6/2017 5:36 PM	3/7/2017 1:18 PM	6.7	0.6
07 Sublet 1	--	--	3/7/2017 1:18 PM	3/7/2017 5:18 PM	4.0	0.4
08 Reassembly	1.5	5.0	3/7/2017 5:18 PM	3/8/2017 8:42 AM	2.4	0.2

After recalculating the repair plan add a repair plan type for that phase, then click **OK**.

The screenshot shows a 'New Repair Plan' dialog box. The title bar says 'New Repair Plan'. Below the title bar is a logo and the text 'New Repair Plan'. A message says 'Please select a repair plan from the list and enter key dates.' Below this is a 'Repair Plan:' label and a dropdown menu. The dropdown menu is open, showing a list of options: 'Estimate Needed', 'Express (6HR)', 'Heavy Hit (4HR)', 'Pending', 'Standard (5HR)', 'Total Loss', and 'Trw. In'. The 'Standard (5HR)' option is selected. At the bottom right of the dialog box, there are 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red box.

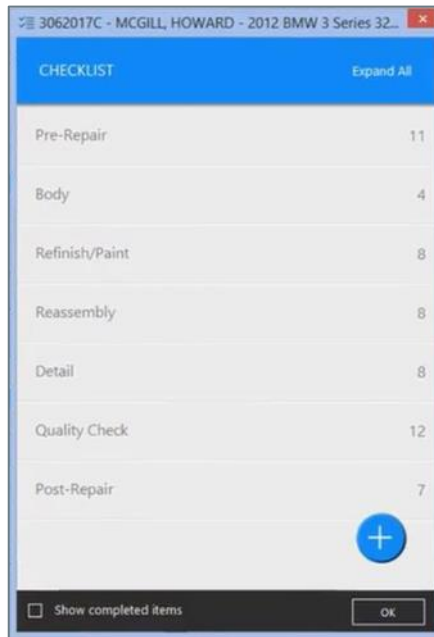
Continued on next page

Checklists - Adding Estimate Lines, Continued

Checklist Items

The Checklist will now reflect the added estimate lines. The images below show the Checklist before and after items were added to the estimate. Notice how the **Structural/Frame** item has been added.

Before:

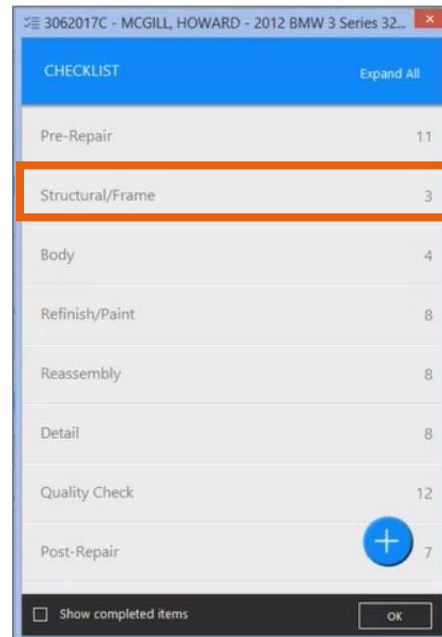


The screenshot shows a window titled "3062017C - MCGILL, HOWARD - 2012 BMW 3 Series 32...". The window contains a "CHECKLIST" table with the following items:

Item	Count
Pre-Repair	11
Body	4
Refinish/Paint	8
Reassembly	8
Detail	8
Quality Check	12
Post-Repair	7

At the bottom of the window, there is a checkbox labeled "Show completed items" and an "OK" button.

After:



The screenshot shows the same window as before, but with an additional item, "Structural/Frame", added to the checklist. The "Structural/Frame" item is highlighted with an orange border. The table now includes:

Item	Count
Pre-Repair	11
Structural/Frame	3
Body	4
Refinish/Paint	8
Reassembly	8
Detail	8
Quality Check	12
Post-Repair	7

The "OK" button and "Show completed items" checkbox are also present at the bottom.