

Convert to Repair Order

Introduction

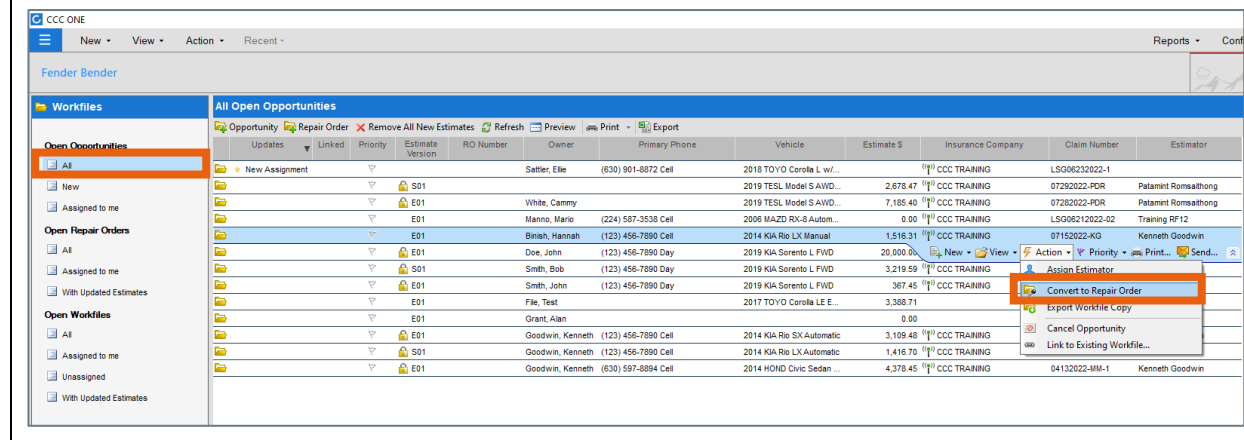
This Job Aid discusses how to convert an Opportunity to a Repair Order (RO) and print RO-related documents in CCC® Repair Workflow.

Convert to Repair Order

An Opportunity or New Opportunity is a potential job where the customer has not yet agreed to or scheduled to have the repair performed. For example, an opportunity can be created when an estimate is performed on the vehicle.

Use the following steps in the table below to convert an Opportunity to a Repair Order.

Step	Action
1	Click All from the Open Opportunities section in the left side panel. Note: Ensure the Views panel is selected.
2	Select an Opportunity from the All Open Opportunities section.
3	Select the Action drop-down menu and select Convert to Repair Order . The RO will open. Note: Based on your configuration, you may be prompted to manually enter an RO number after selecting Convert to Repair Order.

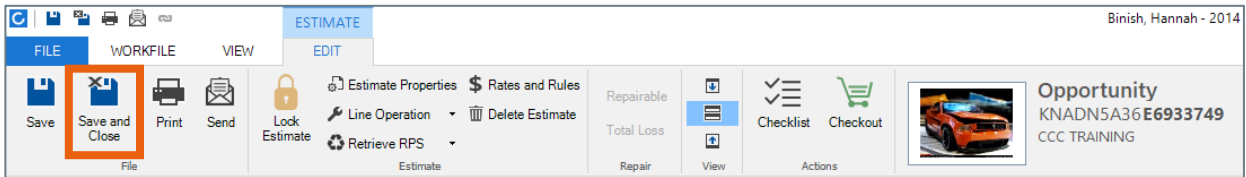


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Convert to Repair Order, Continued

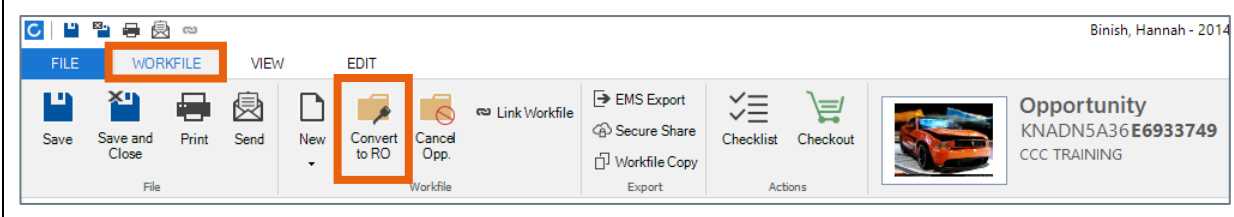
Convert to Repair Order,
continued

Step	Action
4	Review the RO and make necessary changes, then click Save and Close . The Opportunity has now been converted to an RO.



An Opportunity can also be converted to an RO by completing the steps in the table below.

Step	Action
1	Select All from the Open Opportunities section.
2	Open an Opportunity from the All Open Opportunities section.
3	Select Convert to RO from the Workfile tab of the RO.



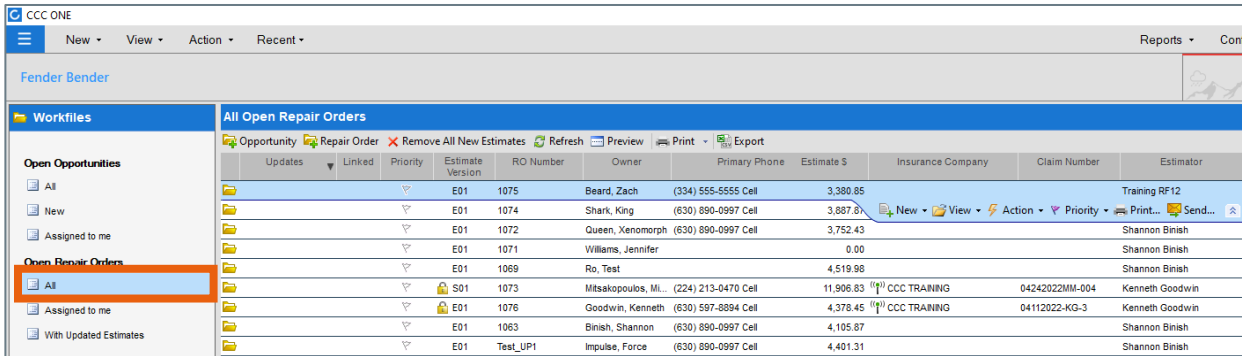
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Convert to Repair Order, Continued

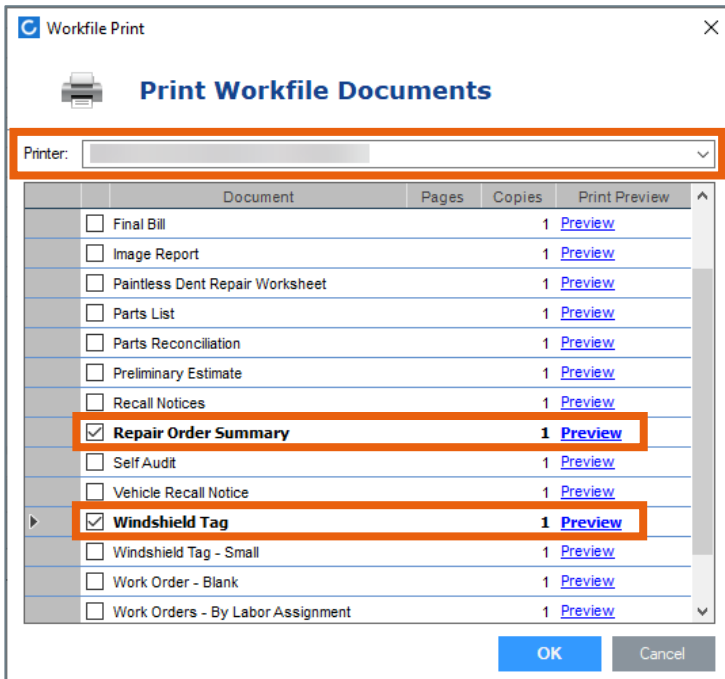
Printing Documents

Use the steps in the table below to print an RO summary and windshield tag.

Step	Action
1	Select All from the Open Repair Orders section on the left side section.
2	Double-click an RO to select it from the All Open Repair Orders list. Click on Print to open the Print Workfile Documents window.



Step	Action
3	Select the appropriate printer from the dropdown box.
4	Select the checkboxes for Repair Order Summary and Windshield Tag . Select checkboxes for other documents as desired.
5	Select the Preview link to view the Document before printing.
6	Click OK . Note: If necessary, follow your computer's printer prompts.



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