Automatic Job Numbering (Estimating Only)

Overview

In CCC® Estimating, a repair facility's profile can be configured for either Automatic or Manual Job Numbering. This document explains how to configure a profile for this setting and use job numbering.
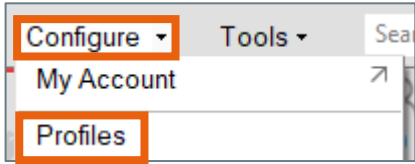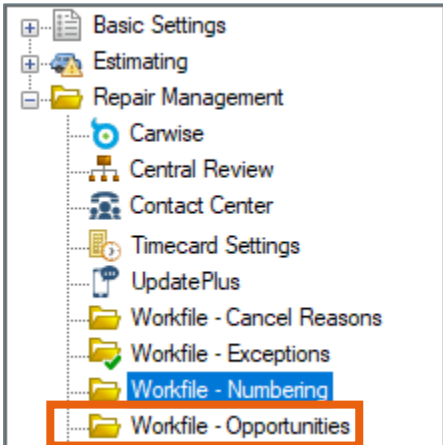
Important Notes

For both Automatic and Manual Job Numbering:

- The **Job Number** field on the Vehicle tab is read-only for Estimating-only customers. It will only be enabled for customers who also have Repair Workflow as their shop management system.
- The **Convert to Job** action is available for both Automatic and Manual Job Numbering. This button is hidden once a job number is assigned.
- Once assigned, the Job Number **cannot** be changed.

Configure Automatic Job Number of Workfiles

This section reviews how to configure the automatic job number for workfiles.

Step	Action
1	Open the **Configure** drop down menu and select **Profiles**.
2	Double-click the appropriate Repair Facility's **profile**.
3	From the **Repair Management** section, click **Workfile – Numbering**.

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**Configure Automatic Job
Number of Workfiles**, Continued

Step	Action
4	Select the radio button for **Automatically** and enter the desired **Initial RO Number** in the text field. **Repair Order Numbering** How would you like the repair orders to be numbered? ○ Manually - the shop location will enter the repair order number when it is created ⦿ Automatically - the system will automatically generate the repair order number Initial RO Number: [ ] **Note:** If Manual Job Numbering is selected, you must enter each Job Number manually on the Vehicle tab of the workfile. For additional information, see the **Using Manual Job Numbering** section below
5	Click **Save and Close**

**Using
Automatic Job
Numbering**

Once Automatic Job Numbering of workfiles is enabled, each time a workfile is created and saved, **Convert to Job** can be selected from the Vehicle tab. When **Convert to Job** is selected, the system automatically sets the Job Number to the next in the sequence and updates the workfile title to include the new Job Number.

**Using Manual
Job Numbering**

If Manual Job Numbering of workfiles is enabled, each time a workfile is created and saved, **Convert to Job** can be selected from the **Vehicle** Tab. The system displays a prompt to enter the Job Number manually. Enter the **Job Number** and click **Submit**. The **Job Number** is saved with the workfile and will appear on the workfile title.