## **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 <sup>®</sup> 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								Act	ion				
1	Click	All fro	om the	e Op	en	Оррс	ortunit	ies secti	on in the lef	t side p	anel.		
	Note	: Ensu	ure the	e Vi	ews	s pan	el is se	elected.					
2	Seleo	ct an C	)pport	uni	ty f	rom t	he All	Open Op	portunities	sectior	າ.		
3	Select the <b>Action</b> drop-down menu and select <b>Convert to Repair Order</b> . The RO will open.												
	open												
	Note	: Base ber aft	ed on y er sel	/oui ect	r co ina	nfigu Conv	iration ert to	, you ma Repair O	y be promp <sup>.</sup> rder.	ted to n	nanually	venter a	n RO
					<u>j</u>								
CCC ONE	w - Action -	Recent -											Reports - Conf
Fender Bender													2
😑 Workfiles	A	ll Open Opport	tunities										
		Opportunity 🙀	Repair Order 🔀 I	Remove All	New Estin	mates 🛛 Refree	ih 🔤 Preview 📻	n Print 👻 🔛 Export					
Open Opportunities	_	Updates	▼ Linked Pri	ority Es	timate ersion	RO Number	Owner	Primary Phone	Vehicle	Estimate \$	Insurance Company	Claim Number	Estimator
2 AI		👌 🔹 New Assignme	ent	?			Sattler, Ellie	(630) 901-8872 Cell	2018 TOYO Corolla L w/	((¶)) I	CCC TRAINING	LSG06232022-1	
New					501				2019 TESL Model S AWD	2,678.47 ((1))	CCC TRAINING	07292022-PDR	Patamint Romsaithong
Assigned to me		2		r 🛍 E	201		White, Cammy	(224) 597 2529 Call	2019 TESL Model S AWD	7,185.40 "["	CCC TRAINING	07282022-PDR	Patamint Romsaithong
Open Repair Orders		2		с с 17 е	E01		Binish, Hannah	(123) 456-7890 Cell	2014 KIA Rio LX Manual	1.516.31 ((1))	CCC TRAINING	07152022-KG	Kenneth Goodwin
🔲 AI			,	ଟ 🔒 ସ	E01		Doe, John	(123) 456-7890 Day	2019 KIA Sorento L FWD	20,000.00	🖡 New - 📂 View - 🗲	Action - Y Priority -	🚐 Print 🖳 Send 👔
Assigned to me		2	1	ଟ 🔒 ଶ	501		Smith, Bob	(123) 456-7890 Day	2019 KIA Sorento L FWD	3,219.59 <sup>((1))</sup>	CCC TRAINING	Assign Estimator	
With Updated Estimate:	. 🖻	•	,	ଟ 🔒 🛙	E01		Smith, John	(123) 456-7890 Day	2019 KIA Sorento L FWD	367.45 <sup>((1))</sup>	CCC TRAINING	Convert to Repair Or	der
Onon Workfilm		2		₹ E	E01		File, Test		2017 TOYO Corolla LE E	3,388.71		Export Workfile Copy	
		2			E01		Grant, Alan	(400) 450 7000 0-8	00111010 01 0111111	00.0		Cancel Opportunity	
		•		· E	501		Goodwin, Kenneth	(123) 456-7890 Cell (123) 456-7890 Cell	2014 KIA Rio SX Automatic 2014 KIA Rio I X Automatic	1,416,70 ((*))	CCC TRAINING GR	Link to Existing Work	file
Assigned to me		- }	,	? 🔒 E	E01		Goodwin, Kenneth	(630) 597-8894 Cell	2014 HOND Civic Sedan	4,378.45 ((*))	CCC TRAINING	04132022-MM-1	Kenneth Goodwin
Unassigned	•												

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## Convert to Repair Order, Continued

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

C	P 🖶 🖗	2		ES	STIMATE							Binish, Hannah - 2014
FILE	WOF	RKFILE	VIEV	V	EDIT							
L Save	Save and Close	Print	Send Send	Lock Estimate	o D Estima	ate Properties Operation 🔹 we RPS 🔹	\$ Rates and Rules Delete Estimate	Repairable Total Loss	•	₩ Checklist	Checkout	Opportunity KNADN5A36 <b>E6933749</b> CCC TRAINING
	File					Estimate		Repair	View	Acti	ions	1

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

Step				Act	ion		
1	Select A	<b>ll</b> from the <b>O</b>	pen Oppor	tunities se	ection.		
2	Open an	Opportunity	from the A	ll Open Op	portunities s	ection.	
3	Select Co	onvert to RC	) from the <b>\</b>	Norkfile ta	ab of the RO.		
C 🗎 🏝 🖶 🗟	CEILE VIEW	EDIT					Binish, Hannah - 2014
Save Save and Close	Print Send	New Convert to RO	eal Link Workfile	EMS Export	Checklist Checkout		Opportunity KNADN5A36 <b>E6933749</b> CCC TRAINING

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## Convert to Repair Order, Continued

2

Use the steps in the table below to print an RO summary and windshield tag. Printing Documents Action Step Select **All** from the Open Repair Orders section on the left side 1 section.

Double-click an RO to select it from the All Open Repair Orders list.

				Clic	k on	Print to	o open '	the Print V	Vorkfil	e Docume	nts windo	DW.
CCC ONE												
⊟ New ▼ View ▼ Ac	tion •	Recent •										Reports • Con
Fender Bender												241
🖿 Workfiles	All	Open Repair (	Orders									
	-	Opportunity 🙀 R	epair Order	🗙 Remo	ve All New E	timates 🛛 Refre	sh 🔜 Preview 🛛 🗃	🖷 Print 👻 🖳 Export				
Open Opportunities		Updates	Linked	Priority	Estimate Version	RO Number	Owner	Primary Phone	Estimate \$	Insurance Company	Claim Number	Estimator
II AI				8	E01	1075	Beard, Zach	(334) 555-5555 Cell	3,380.85			Training RF12
New				7	E01	1074	Shark, King	(630) 890-0997 Cell	3,887.8	🚬 🖳 New 🕶 💕 View 🕶 🤗	Action • 👻 Priority •	🚔 Print 🙀 Send  🖈
Assigned to me				8	E01	1072	Queen, Xenomorp	h (630) 890-0997 Cell	3,752.43			Shannon Binish
				7	E01	1071	Williams, Jennifer		0.00			Shannon Binish
Open Repair Orders				19	E01	1069	Ro, Test		4,519.98			Shannon Binish
I AI				Ŷ	🔒 S01	1073	Mitsakopoulos, Mi.	(224) 213-0470 Cell	11,906.83	((1)) CCC TRAINING	04242022MM-004	Kenneth Goodwin
Assigned to me				8	🔒 E01	1076	Goodwin, Kenneth	(630) 597-8894 Cell	4,378.45	(()) CCC TRAINING	04112022-KG-3	Kenneth Goodwin
With Undated Estimates				8	E01	1063	Binish, Shannon	(630) 890-0997 Cell	4,105.87			Shannon Binish
This opulies Estimates				8	E01	Test UP1	Impulse, Force	(630) 890-0997 Cell	4,401.31			Shannon Binish

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

	Print Workfile Doc	ument	S		
Printer:					`
	Document	Pages	Copies	Print Preview	1
	Final Bill		1	Preview	
	Image Report		1	Preview	
	Paintless Dent Repair Worksheet		1	Preview	
	Parts List		1	Preview	
	Parts Reconciliation		1	Preview	
	Preliminary Estimate		1	Preview	
	Recall Notices		1	Preview	
	🗹 Repair Order Summary		1	Preview	
	Self Audit		1	Preview	
	Vehicle Recall Notice		1	Preview	
▶	🗹 Windshield Tag		1	<u>Preview</u>	
	🗌 Windshield Tag - Small		1	Preview	
	Work Order - Blank		1	Preview	_
	Work Orders - By Labor Assignment		1	Preview	•
			0	K Cance	:

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