

Job Aid: Automatic Job Numbering

Purpose			• ·	your IA Company profile to use ng the procedures listed below.					
Procedure	Follow these steps to enable automatic job numbering on workfiles:								
	Step	ep Action							
	1	Go to Configure > Profiles from the menu bar.							
	2	Select your the mini-toc	rofile, and then select Edit from						
	3 Click on the Workfile Numbering link under Workfile Management in the left panel.								
Profile Settings									
File Help			If you select "Manual" you						
🛃 Save 🚽 Save and G	Close			must enter each Job					
OC'S BEST	Γ APPRA	ISERS 1		Number on the Vehicle tab of the workfile.					
⊕ Basic Settings		Workfile N	lumbering						
Estimating	ement	How would you like the workfile Job Number to be numbered?							
🦉 Marketing –		Manually - Enter workfile Job Number manually							
		Automatically - the system will automatically generate the workfile Job Number							
Workflow -	-	In	1000						
	4	Click on the	radio button fo	or Automatically.					
	5	Enter the Ini	tial Job Numbe	r for the next workfile in the field.					
	6 Click on Save and Close .								
_									
Using Automatic		,	,	e a workfile, you can select cally sets the job number to the					

	converte job. The system deformationly sets the job notified to the							
Job	next in the	Model:	ACCORD EX	-	Trim Code:			
Numbering	sequence		Select Standard Vehicle		License Plate:			
	and updates the workfile	Body Style:	4D SED	•	License Expiration:	_/		
		Engine:	6-3.5L-FI		Package 1:			
	title to include the new job number.	Odometer:			Package 2:			
		Production Date:			Job Number:	12345		
		Odometer:	6-3.5L-FI		Package 2:	12345		

Continued on next page



One. True. Partner.

Job Aid: Automatic Job Numbering, Continued

Using ManualIf Manual Job Numbering is enabled, every time you create and save
a new workfile, you can select "Convert to Job". The system will display
a prompt to enter a Job Number manually. The Job Number is saved
with the workfile and will appear on the workfile title.

Description Options Tires	
VIN Damage	
Recall Notices Repairable Vehicle Condition:	(12)
Decode U Vehicle not selected from VIN	• 11 _ 1
Vehicle Information Primary Point of Impact:	
	· (10) 2
Type: Car Tinterior Color: Secondary Point of Impact: 02 Right Front Pillar (Right Si	9 13 3
Year / Make: 2015 V HOND V Paint Code:	
Model: ACCORD EX Trim Code: Orivable	(8) (4)
Select Standard Vehi Convert to Job	(7) (5)
Body Style: 4D SED Enter Job Number:	(6)
Engine: 4-2.4L-FI Impact Note:	Ŭ
Odometer: Cancel	*
Production Date: Job Number:	~

Important Notes

Regardless of which type of numbering you choose, it is important to remember the following:

- The **Job Number** field on the Vehicle tab is read-only for estimatingonly customers. It will only be enabled if you also have Repair Workflow as your shop management system.
- The **Convert to Job** action is available no matter what type of numbering you use.
- The **Convert to Job** action is hidden once a Job Number is assigned.
- You **cannot change** the Job Number once it has been added.