Convert Workfile to Repair Order and Add a Repair Plan

- Introduction Workfiles must be converted to a Repair Order (RO) to add a Repair Plan to your Workfile. Doing this will add Repair Order related items to your Checklist.
- Checklist Before a Workfile is Items converted to an RO to include a repair plan it will by default have Pre-Repair and Post-Repair checklist items. These checklist items will be locked. After a repair plan is added, additional checklist items will appear on the Checklist between these phases.

28 2	- 2012 BMW 3 Series 328i RWD 🗙
CHECKLIST	Expand All
Pre-Repair	12
Post-Repair	7
	+
Show completed	items OK

Note: The Task button is now called Checklist. All tasks will appear here.

Convert to RO To convert the Opportunity to an RO, select the Workfile tab and select Convert to RO.



When prompted, enter the RO Number, then click **OK**.

Enter RO Number:	3062017C					
			Cancel			

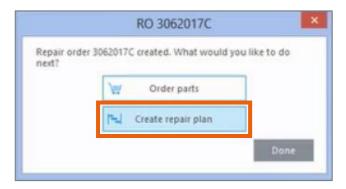
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Convert Workfile to Repair Order and Add a Repair Plan, Continued

After entering an RO number, you will be prompted to Order parts or Adding a New Create repair plan, and select **Create repair plan**. **Repair Plan**



The New Repair Plan dialog box opens, select a Repair Plan type and click OK.

	New Repair Plan							
	New Repai Please select a repi		ist and enter	key dates.				
Repair Plan:	Estimate Needed Express (SHR) Heavy Ht (4HR) Pending Standard (SHR) Total Loss Triw In		*					
Vehicle In:	03/06/2017	7:00 AM 🗸						
Repairs Started:	03/06/2017	7:00 AM 🗸						
					ОК	Cancel		

When complete, click **Save**.

	2 8					WD	-				
FILE	WC	RKFILE	VIEV	V EDIT							
Save	New	Convert to RO	Cancel Opp.	es Link Workfile	EMS Export	Checklist	Checkout	no photo	Opportunity		
File.		Workfile			Export	Act	ions		_		

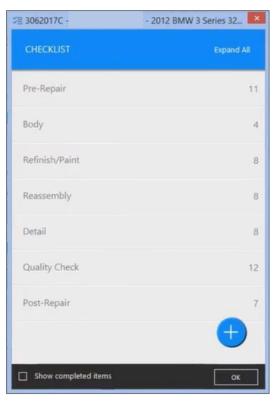
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Convert Workfile to Repair Order and Add a Repair Plan, Continued

Adding a New The Checklist items will now **Repair** Plan, reflect the phases of the repair continued plan.



The Repair Plan tab will now show the vehicle's repair plan. This matches the repair plan shown in the Checklist above.

	Original: Revised:	Vehicle In: 03/06/2017 03/06/2017	7:00 AM	, L	Repairs Star		5 03	pairs Complete 3/08/2017 3/08/2017		Promise / Ve	hide Out: 4:00 PM	*			
		Complete			Complete			Complete		Complete	revious Week	Today	Next	Wee	k =
	ri Sat /3 3/4	3/5		3/7	Wed Th 3/8 3/1		Fri I/10	Sat 3/11	Sun 3/12	Mon 3/13	Tue 3/14	Wed 3/15		Thu 3/16	
1	e Details dd Phase 💢 Remove	Phase 🔏 Co	nplete as Sc	heduled 🦮	Incomplete	C Recalc	ulate								
		Repair	Phase		R Ho			Start		Finish	Produ		wation Days		0
	00 Vehicle Check						- 3/6/20	17 7:00 AM	3/6/	2017 8:00 AM		1.0	0.1		L
	04 Body					6.0 5.0	3/6/20	17 8:00 AM	3/6/	2017 5:36 PM		9.6	0.9		
	06 Refinish/Paint					4.2 5.0	3/6/20	17 5:36 PM	3/7/	2017 1:18 PM		6.7	0.6		
	07 Sublet 1						- 3/7/20	17 1:18 PM	3/7/	2017 5:18 PM		4.0	0.4		
													0.2		



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