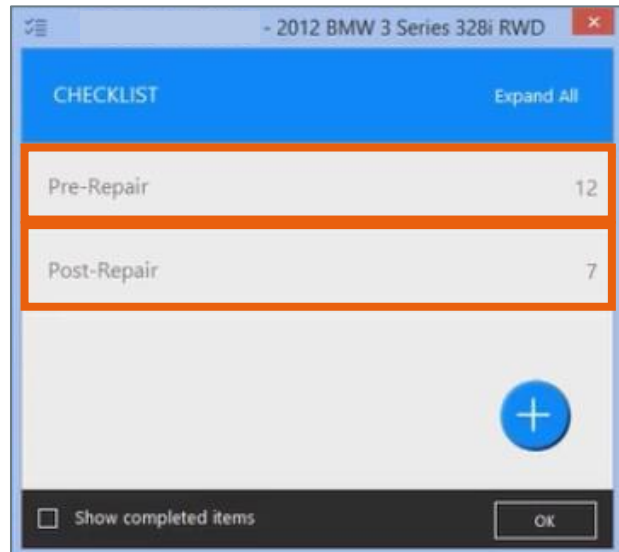


Convert Workfile to Repair Order and Add a Repair Plan

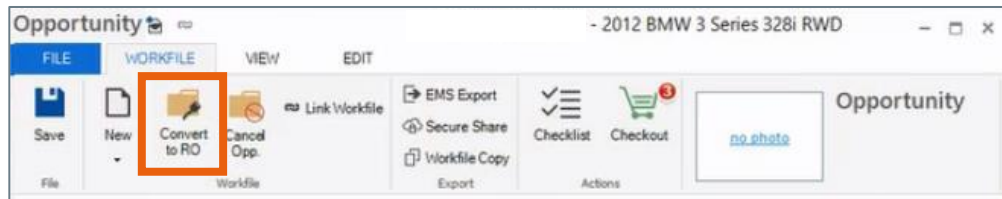
Introduction Workfiles must be converted to a Repair Order (RO) to add a Repair Plan to your Workfile. Doing this will add Repair Order related items to your Checklist.

Checklist Items Before a Workfile is 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.



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**.



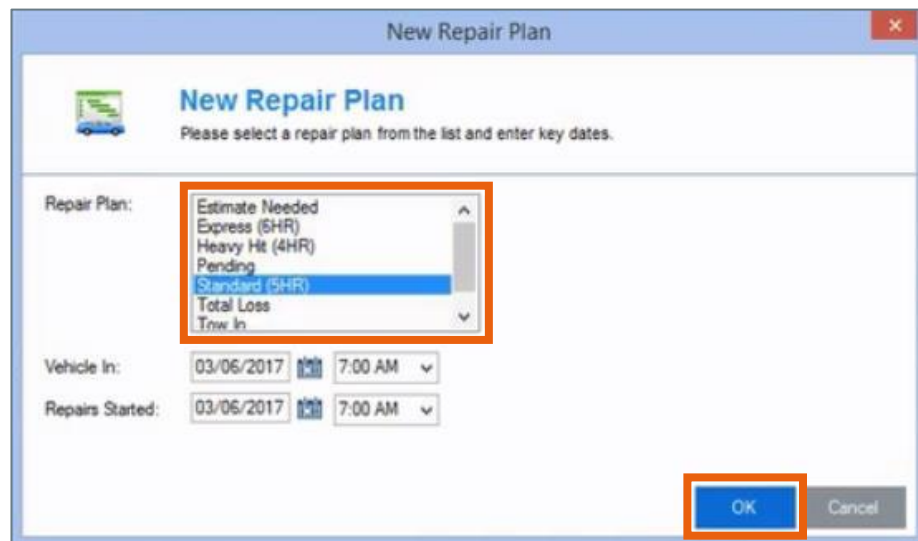
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Convert Workfile to Repair Order and Add a Repair Plan, Continued

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



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



When complete, click **Save**.

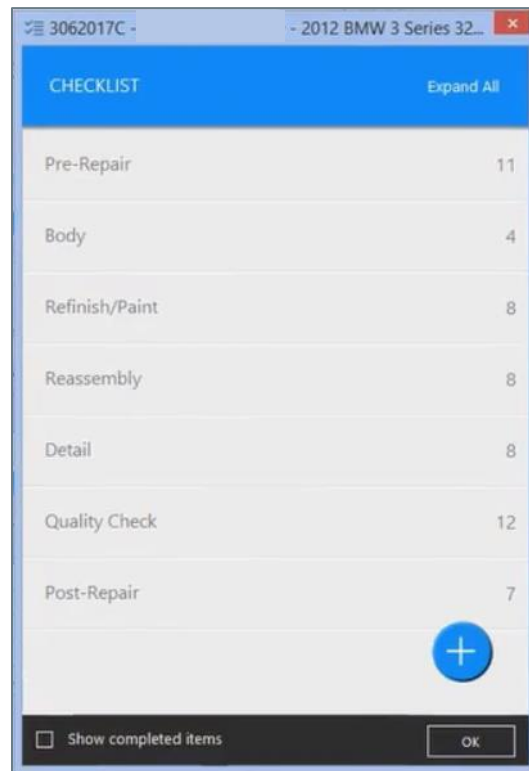


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Convert Workfile to Repair Order and Add a Repair Plan, Continued

Adding a New Repair Plan, continued

The Checklist items will now reflect the phases of the repair plan.



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

