

R O M E

**2022 WORKBOOK**

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**CANONS OF SUCCESS**

**VEHICLE  
DESIGNATION**

**2022**



# **VEHICLE DESIGNATION**

## ORDER/PRE-ORDER PARTS BUTTON

The Order/Pre-order button has three color conditions. The “Red” color means parts are not selected for order or pre-order. Yellow button color means parts are selected for order/pre-order where your parts department will now see this RO on their Parts Management List. “Green” color means the parts department has ordered all of the parts.

To change the color from “Red” to “Yellow”, simply click on the button. By the Writer clicking on the “order/pre-order” parts button (changing it from Red to Yellow) they are authorizing the Parts Department to proceed with ordering parts. If the RO does not have any parts on it the parts department will not see the RO on their list until parts are added. Make the parts designation yellow when the RO is confirmed and let the parts department decide when to order the parts based on availability and scheduled date in.

Order/Pre-Order

Order/Pre-Order

Order/Pre-Order

RO (0002882 - 1D3HB13T595773063)
Tools Est./Suppl PPD Alert Print Multiple Print

Order/Pre-Order

Auth/Cust

Auth/Ins.

Blueprint

On Hold

In Shop

Completed

Customer | Misc. | Notes | Worksheet | Payments | Cost

RO No.: 0002882.00  
WEBINAR / B-LIGHT HIT /

Status: ☒ Active ☐ Inactive ☐ Void

☐ Insr Hold ☐ Tow In ☐ Comeback RO  
☐ Total Loss Review RO

First Name:  Cell:  Des./Phone:   
Last Name:  Fax:  Des./Phone:   
Addr1:  E-Mail:   
Addr2:  E-Mail 2:  Spouse:   
City, ST, Zip:    Insurer:  Policy No:   
Home/Work:   Adjuster:  Date Loss:   
Writer:  Year:  Claim R.:  Claim No:   
Writer 2:  Prod Date:  Source(s):

Cost  
☒ Call Cust ☐ Call ☒ Contact/Info  
Fleet Acct:  Make:  Color:   
PO:  Model:  Paint Cd:   
VIN:  Style:  Trim Cd:   
Type:  Engine:

Notes  
Customer Supplmnt  
Shop Security  
Office Man. Mail  
Parts Auto Mail  
Paint Remarks  
Status  
☒ Body Paint  
☒ Body Paint  
☒ Mech  
☒ Frame  
☒ Sublet

Key Tag:   
Unit:   
Mileage In:   
Mileage Out:   
ST Lic:

Date Creatd:   
Date In:   
In Shop:   
Date O.P.:   
Date Due: 0

Pay Resp  
Owner ☒  
Claimant ☒  
Insured ☒  
Shop ☐  
Date Cmpit:   
Date Out:   
Delivered:   
Deduct:   
Betterment:

Grand Total: 1,652.93  
Payments: 0.00  
Balance: 1,652.93

Level Layer Parts Labor Sublet/Misc Schedule Forecast Profile File Jacket A

3  
07:56AM ROWELL

# Proper Repair Order Designation:

## AUTH/CUST DESIGNATION

When the CSR or Writer Clicks on the “Auth/Cust” button, they are indicating that the vehicle has been dropped off and is on the property and Customer Authorization is in the process of being obtained. This RO will show on the calendar in Light Blue on the RO Date in. Once Customer Authorization is obtained, a second click on the “Auth/Cust” button will change the button color to “Green”.

The screenshot shows the Repair Order (RO) form for RO No. 0002882.00. The form is divided into several sections: Customer Information, Vehicle Information, Insurance, and Financials. The 'Auth/Cust' button is highlighted in three callout boxes: red (initial state), yellow (after first click), and green (after second click). The form also includes a 'Review RO' button and a 'Status' dropdown menu.

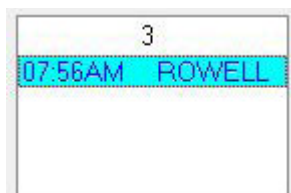
Callout boxes above the form show the 'Auth/Cust' button in three states: Red, Yellow, and Green.

Form Fields:

- RO No.: 0002882.00
- WEBINAR / B-LIGHT HIT /
- Customer: James
- Last Name: Rome
- Address: 25319 Winding Creek Court
- City, ST, Zip: Baltimore, MD, 21100
- Home/Work: 301-555-1212, 410-555-1212
- Writer: [Blank]
- Year: 21
- Prod Date: [Blank]
- Source(s): DRP
- Make: DODG
- Color: Black
- Model: RAM 1500 4X2 CR
- Paint Cd: [Blank]
- Style: 4D P/U
- Trim Cd: [Blank]
- Engine: 8-5.7L-FI
- Insurer: FARMERS
- Policy No: 9512587453A
- Date Loss: [Blank]
- Claim No: 123456789-01
- Claim R: [Blank]
- Notes: Customer Supplmnt, Shop, Office, Man. Mail, Parts, Auto Mail, Paint, Remarks
- Status: Body Paint, Mech, Frame, Sublet
- Cost: Parts, Body Paint, Mech, Frame, Sublet
- Key Tag: [Blank]
- Unit: [Blank]
- Mileage In: 5,432
- Mileage Out: 0
- ST Lic: MD, RAMIT
- Date Creatd: 10/06/21
- Date In: 10/06/21
- In Shop: 10/06/21
- Date O.P.: 10/11/21
- Date Due: 0, 10/11/21
- Pay Resp: Owner, Claimant, Insured, Shop
- Date Cmpl: [Blank]
- Date Out: [Blank]
- Delivered: [Blank]
- Deduct: 250.00
- Betterment: [Blank]
- Grand Total: 1,652.93
- Payments: 0.00
- Balance: 1,652.93

Buttons: Level, Layer, Parts, Labor, Sublet/Misc, Schedule, Forecast, Profile, File Jacket, OK, Cancel

A scheduled in RO will be yellow on the calendar on the RO's Date In until the Auth/Cust button is clicked to yellow. Once the Auth/Cust is yellow the RO will appear on the calendar in light blue on the RO's Date In.



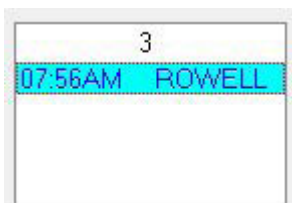
# Proper Repair Order Designation:

## AUTH/INS DESIGNATION

By the CSR or Writer clicking on the "Auth/Ins." button, changing it to yellow, they are indicating that the Insurance Authorization is in the process of being obtained. By clicking on Auth/Ins a second time, changing it to green, this indicates that the Insurance Authorization is obtained and the Blueprint designation will automatically turn Yellow.

The screenshot shows the Repair Order (RO) software interface. At the top, three colored boxes represent the 'Auth/Ins.' button status: red (initial state), yellow (in process), and green (completed). Red arrows point from these boxes to the 'Auth/Ins.' button in the software interface, which is currently yellow. The interface includes various tabs like 'Order/Pre-Order', 'Auth/Cust', 'Auth/Ins.', 'Blueprint', 'On Hold', 'In Shop', and 'Completed'. The 'Auth/Ins.' tab is selected. The main form contains fields for Customer (James Rome), Vehicle (DODG RAM 1500 4X2 CR), Insurance (FARMERS), and Repair details (Make, Model, Color, Paint, etc.). The 'Auth/Ins.' button is highlighted in yellow, indicating that the Insurance Authorization is in the process of being obtained.

This RO will show on the calendar in Light Blue on the RO Date In.



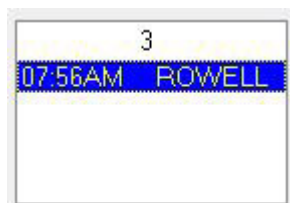
# Proper Repair Order Designation:

## BLUEPRINT DESIGNATION

The Blueprint button being “yellow” indicates the vehicle has been authorized and now needs to begin the blueprint process. The car should be disassembled and blueprinted with 1-3 hours of vehicle possession.

The screenshot shows the Repair Order (RO) software interface. At the top, there is a navigation bar with buttons: Order/Pre-Order, Auth/Cust, Auth/Ins, **Blueprint** (yellow), On Hold, In Shop, and Completed. Three red callout boxes labeled "Blueprint" point to this yellow button. The main form contains customer information (James Rome, 25319 Winding Creek Court, Baltimore, MD 21100), contact details (james@rometech.com), insurance information (FARMERS, Policy No. 9512587453A), and vehicle details (DODG RAM 1500 4X2 CR, 4D P/U, 8-5.7L-FI). The bottom of the form has tabs for Level, Layer, **Parts**, Labor, Sublet/Misc, Schedule, Forecast, Profile, File Jacket, and a green triangle icon. The bottom right corner shows financial totals: Grand Total: 1,652.93, Payments: 0.00, and Balance: 1,652.93.

This RO will show on the calendar in royal blue on the RO date in. When the blueprint is completed click on the blueprint button to change it to “green”. This will automatically change the On Hold designation to “yellow”.



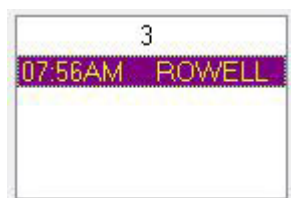


# Proper Repair Order Designation: ON HOLD DESIGNATION

When the On Hold button is “yellow” this indicates that the Blueprint is completed and we are waiting/on-hold before moving to production. A technician should be assigned during the Blueprint process to be paid for disassembly time. The RO is “On Hold” due to supplement approval, waiting on mission critical parts to be received (the parts required to get the vehicle through the body/frame/mech production steps) and we have a technician bay in the shop for the job to be started. If the critical parts are received then change the On Hold designation to Green. We can then mark that the “On hold” designation is completed.

The screenshot shows the 'RO (0002882 - 1D3HB13T59S773063)' window. At the top, there are three 'Dispatch' buttons: a red one, a yellow one, and a green one. The yellow 'On Hold' button is highlighted with a red arrow. Below the buttons is a tabbed interface with 'Order/Pre-Order', 'Auth/Cust', 'Auth/Ins.', 'Blueprint', 'On Hold', 'In Shop', and 'Completed'. The 'On Hold' tab is active. The form contains various fields for customer information (First Name: James, Last Name: Rome, Address: 25319 Winding Creek Court, City: Baltimore, MD 21100), vehicle information (Make: DODG, Model: RAM 1500 4X2 CR, Year: 21, Color: Black), and repair details (Status: Active, Insurer: FARMERS, Policy No: 9512587453A, Claim No: 123456789-01). There are also buttons for 'Call Cust', 'Contact/Info', 'Make', 'Color', 'Paint Cd', 'Trim Cd', 'Engine', 'Date Creadt', 'Date In', 'In Shop', 'Date O.P.', 'Date Due', 'Time', 'Pay Resp', 'Owner', 'Claimant', 'Insured', 'Shop', 'Date Cmpl', 'Date Out', 'Delivered', 'Deduct', 'Betterment', 'Grand Total', 'Payments', and 'Balance'. The 'On Hold' button is yellow, indicating the RO is on hold.

This RO will show on the calendar in Purple on the RO date in. When the RO is assigned to a technician we will click on the Dispatch button to change it to “green”. The In Shop button will automatically change to “yellow” indicating the RO is in the “In Shop” status.



# Proper Repair Order Designation: IN SHOP DESIGNATION

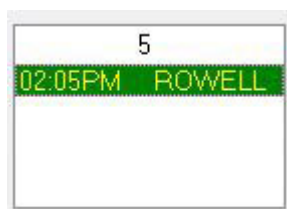
When the Dispatch button is clicked from “yellow” to “green” this will automatically change the In Shop button from “red” to “yellow”. This indicates that the repairs have been started and the vehicle is now being managed through the big board production task to the date due.

The screenshot shows a software window for a Repair Order (RO) with the title "RO (0002882 - 1D3HB13T59S773063)". The window has a menu bar with "Tools", "Est./Suppl", "PPD Alert", "Print", and "Multiple Print". Below the menu bar are several tabs: "Order/Pre-Order", "Auth/Cust", "Auth/Ins.", "Blueprint", "On Hold", "In Shop", and "Completed". The "In Shop" tab is highlighted in yellow. Three red arrows point from three separate "In Shop" buttons (one red, one yellow, one green) above the window to the "In Shop" tab in the software interface.

The main form area contains the following fields and sections:

- Customer Information:** RO No.: 0002882.00, WEBINAR / B-LIGHT HIT / ., Status: Active, Insr Hold, Tow In, Comeback RO, Review RO (yellow button).
- Customer Details:** First Name: James, Last Name: Rome, Addr1: 25319 Winding Creek Court, Addr2: , City: Baltimore, ST: MD, Zip: 21100, Home/Work: 301-555-1212, 410-555-1212, E-Mail: james@rometech.com, E-Mail 2: , Spouse: , Insurer: FARMERS, Policy No.: 9512587453A, Date Loss: , Claim No.: 123456789-01, Claim R.: , Source(s): DRP.
- Vehicle Information:** Make: DODG, Color: Black, Model: RAM 1500 4X2 CR, Paint Cd: , Trim Cd: , Engine: 8-5.7L-FI, Type: TK, VIN: 1D3HB13T59S773063, Year: 21, Prod Date: , Call Cust (green button), Call, Contact/Info (green button).
- Notes and Status:** Notes: Customer Supplmnt, Shop Security (blue button), Office Man. Mail, Parts (blue button), Auto Mail, Paint, Remarks. Status: Body Paint (red button), Mech Frame Sublet (red button), Mech Frame Sublet (red button).
- Key Tag and Mileage:** Key Tag: , Date Creatd: 10/06/21, Unit: , Date In: 10/06/21, Mileage In: 5,432, In Shop: 10/06/21, Mileage Out: 0, Date O.P.: 10/11/21, ST Lic: MD, RAMIT, Date Due: 0, 10/11/21, Time: 9:55AM.
- Pay Resp and Grand Total:** Pay Resp: Owner (checked), Claimant (unchecked), Insured (checked), Shop (unchecked), Date Cmpit: , Date Out: , Delivered: , Deduct: 250.00, Grand Total: 1,652.93, Payments: 0.00, Balance: 1,652.93.
- Bottom Bar:** Level, Layer, Parts (blue button), Labor, Sublet/Misc, Schedule, Forecast, Profile, File Jacket, A (green button), OK, Cancel.

This RO will show on the calendar in “green” on the RO date due. It will stay on this date unless the date due is updated based on new forecasting/production delays.





## Proper Repair Order Designation:

# COMPLETED DESIGNATION

When the RO is completed click on the In Shop to change it to “green”. This will automatically put a Date Completed on the RO changing the Completed Button to “orange”.

Completed
Completed

RO (0002882 - 1D3HB13T59S773063)
Tools Est./Suppl PPD Alert Print Multiple Print

Order/Pre-Order
Auth/Cust
Auth/Ins.
Blueprint
On Hold
In Shop
Completed

Customer | Misc. | Notes | Worksheet | Payments | Cost

RO No.: 0002882.00

WEBINAR / B-LIGHT HIT /

Status: ☒ Active ☐ Inactive ☐ Void

☐ Insr Hold ☐ Tow In ☐ Comeback RO

☐ Total Loss ☐ Review RO

First Name:

Last Name:

Addr1:

Addr2:

City, ST, Zip:

Home/Work:

Writer:

Writer 2:

Cell:

Fax:

E-Mail:

E-Mail 2:

Insurer:

Adjuster:

Claim R.:

Des./Phone:

Des./Phone:

Spouse:

Policy No.:

Date Loss:

Claim No.:

☒ Call Out ☐ Call ☒ Contact/Info

Fleet Acct:

PO:

VIN:

Make:

Model:

Style:

Type:

Color:

Paint Cd:

Trim Cd:

Engine:

Source(s):

Notes

Customer Supplmnt

Shop ☒ Security

Office Man. Mail

Parts ☒ Auto Mail

Paint Remarks

Status

☒ Body

☒ Paint

Mech

Frame

Sublet

Cost

Parts

Body

Paint

Mech

Frame

Sublet

Key Tag:

Unit:

Mileage In:

Mileage Out:

ST Lic:

Date Creatd:

Date In:

In Shop:

Date O.P.:

Date Due:

Pay Resp

Owner ☒

Claimant ☐

Insured ☒

Shop ☐

Date Cmpl:

Date Out:

Delivered:

Deduct:

Betterment:

Grand Total: 1,652.93

Payments: 0.00

Balance: 1,652.93

Level

Layer

Parts

Labor

Sublet/Misc

Schedule

Forecast

Profile

File Jacket

☒ A

OK

Cancel

This RO will show on the calendar in “orange” on the RO date due.

5
02:05PM ROWELL

## In Shop-Auth/Ins-Hold: INSURANCE HOLD DESIGNATION

RO is on hold after the initial approved repairs were started. This RO is waiting on further authorization from the insurance company.

RO (0002882 - 1D3HB13T59S773063)

Tools
Est./Suppl
PPD Alert
Print
Multiple Print

Order/Pre-Order
Auth/Cust
Auth/Ins.
Blueprint
On Hold
In Shop
Completed

Customer
Misc.
Notes
Worksheet
Payments
Cost

RO No.: 0002882.00  
WEBINAR / B-LIGHT HIT / .

Note

☐ Insr Hold
☐ Tow In
☐ Comeback RO

Status:
☒ Active
☐ Inactive
☐ Void
☐ Total Loss

Review RO

First Name:

James

Cell:
Des./Phone:

Last Name:

Rome

Fax:
Des./Phone:

Addr1:

25319 Winding Creek Court

E-Mail:

james@rometech.com

Addr2:
E-Mail 2:
Spouse:

City, ST, Zip:

Baltimore

MD

21100

Insurer:

FARMERS

Policy No.:

7531598521

Home/Work:

800-373-7663

410-923-2000

Adjuster:
Date Loss:

Writer:
Year:

21

Claim R.:
Claim No.:

357951258741-01

Writer 2:
Prod Date:
Source(s):

DRP

Call Cust

Call

Contact/Info

Make:

DODG

Color:

BLACK

Fleet Acct#:
Model:

RAM 1500 4X2 CR

Paint Cd:

PO:
Style:

4D P/U

Trim Cd:

VIN:

1D3HB13T59S773063

Type:

TK

Engine:

8-5.7L-FI

Notes

Customer Supplmnt
Shop
Office
Parts
Paint

Status

Body Paint

Mech
Frame
Sublet

Cost

Body Paint

Mech
Frame
Sublet

Key Tag:
Unit:
Mileage In:

5,432

Mileage Out:

0

ST Lic:

MD

RAMIT

Date Creatd:

10/06/21

Date In:

10/06/21

In Shop:

10/07/21

Date O.P.:

10/11/21

Date Due:

0

Pay Resp
☐
Owner
☐
Claimant
☐
Insured
☐
Shop
☐

Date Cmpl:
Date Out:
Delivered:
Deduct:
Betterment:

Grand Total: 1,652.93  
Payments: 0.00  
Balance: 1,652.93

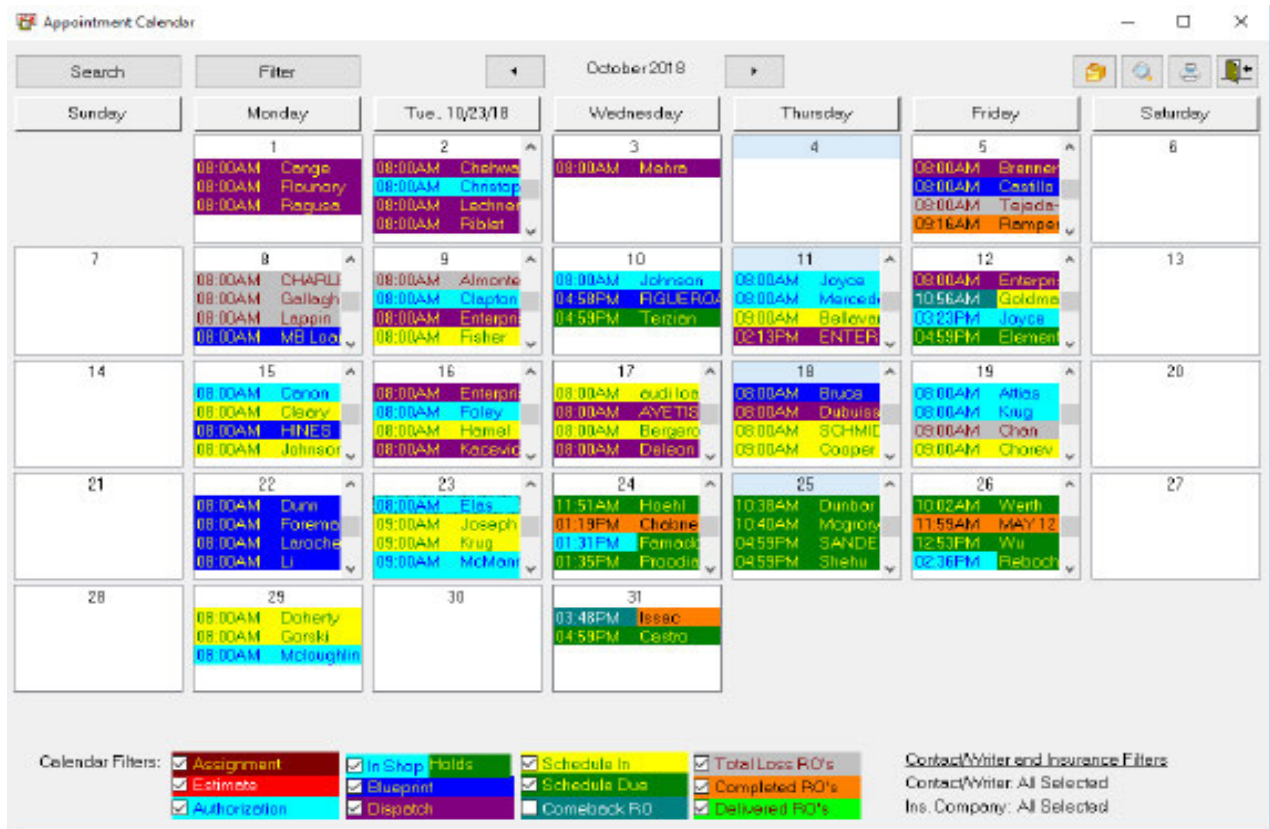
Level
Layer
Parts
Labor
Sublet/Misc
Schedule
Forecast
Profile
File Jacket
OK
Cancel

5	<input checked="" type="checkbox"/> In Shop	Holds
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# CALENDAR

An accurate calendar is required to gain the full benefit of the Rome Management solution. The efficiency of all departments is dependent upon its accuracy. We use vehicle designation to allow each department to define and prioritize the decisions it makes which will impact the cycle time and customer service. Each designation has a predefined location on the calendar for easy decision-making. The following list outlines the vehicle designations, correct locations, the dates that define them and the responsible parties that maintain each designation. By looking at the calendar, management can see any inaccuracies and know who needs to correct them.

There are three levels of detail in the calendar; Month, Week and Day



Calendar Filters:

☒ Assignment  
☒ Estimate  
☒ Authorization

☒ In Shop Holds  
☒ Blueprint  
☒ Dispatch

☒ Schedule In  
☒ Schedule Due  
☒ Comeback RO

☒ Total Loss RO's  
☒ Completed RO's  
☒ Delivered RO's

Clear All

## Calendar: Weekly View - Click the magnifying glass to see the week

Appointment Calendar

Search Filter December 9, 2018 - December 15, 2018

Sunday	Monday	Tuesday	Wednesday	Thurs., 12/13/18	Friday	Saturday
9	10	11	12	13	14	15
	08:00AM Baker	09:00AM Meneus	08:00AM Ely	08:09AM Pattison	08:12AM Dunbar	
	08:00AM James	09:00AM Pauling	08:00AM Plaisir	09:00AM Andrews	08:17AM Woo	
	08:00AM Pappas	10:07AM STOLOFF	08:00AM Spencer-S	09:00AM Arce	08:32AM Vitain	
	08:00AM Yalutova	10:15AM PRIME PO	09:00AM Charles	09:00AM Essa	09:10AM LEVIN	
	09:00AM Hernandez	12:49PM PRIME AC	09:00AM Hendersor	09:00AM Santoso	09:54AM Holmes Ne	
	02:45PM Mercedes	03:49PM Pina	09:00AM PRIME PO	09:00AM Thalh	11:36AM Shee	
	04:56PM Decker	03:49PM Morita	09:00AM Zhao	09:12AM Enterpr	12:11PM Cotton	
	04:58PM Farley	03:50PM Teufel	09:23AM PRIME TO	10:40AM Enterpr	01:15PM Kaufman	
	04:59PM Carre	04:59PM Enterprise	09:41AM Enterprise	11:17AM PRIME T	02:54PM Podjerski	
	04:59PM Drummey	04:59PM Enterprise	09:50AM Enterprise	12:26PM Roos	03:12PM Mceacherr	
	04:59PM Enterprise	04:59PM Enterprise	11:13AM Fieldmen	02:56PM Askari	03:31PM Audi Loene	
	04:59PM Enterprise	04:59PM Clair	11:22AM Ward	03:12PM Enterpr	03:37PM Amal	
		04:59PM Coleman	03:12PM Enterprise	03:12PM VOID EN	03:43PM EISENBEF	
			03:12PM Bowman	03:12PM Lyons	03:45PM Elvin	
			04:58PM Seadia	04:22PM Ratzlaff	03:51PM Chan	
			04:59PM Enterprise	04:58PM Flores	04:59PM PRIME PO	
			04:59PM PRIME TO	04:59PM Collymo	04:59PM Monaco	
				04:59PM GIOVINI	04:59PM Acura Loar	
				04:59PM Salvagg	04:59PM Alvarado	
				04:59PM Wheato	04:59PM Dokaoglu	
					04:59PM Galecia	
					04:59PM Payne	
					04:59PM Perring	

Calendar Filters:

- ☒ Assignment
- ☒ Estimate
- ☒ Authorization
- ☐ In Shop Holds
- ☒ Blueprint
- ☒ Dispatch
- ☒ Scheduled In
- ☒ Scheduled Due
- ☐ Comeback RO
- ☒ Total Loss RO's
- ☒ Completed RO's
- ☒ Delivered RO's

Contact/Writer and Insurance Filters

Contact/Writer: All Selected

Ins. Company: All Selected

## Calendar: Daily View - double click on the date in rome to see the daily view

Calendar Entries

Date Range Start Date: 12/13/18 End Date: 12/13/18

by Appointment | by Customer Name | by Home Phone | by Work Phone | by Claim Number | by Damage Profile

Appointment Date:

Calendar	Forecast	RO	Last Name	Home Phone	Work Phone	Cont./Writer	Dmg	Insurance
Date	Time	Date	Time					
12/13/18	8:09AM			0170682.00	Pattison	508-272-8692	SHAWN	2 METROPC
12/13/18	9:00AM			0171101.00	Andrews-Romain	617-637-9653	SHAWN	1 GEICO XD
12/13/18	9:00AM			0171097.00	Arce	813-476-2002	SHAWN	1 GEICO XF
12/13/18	9:00AM			0171095.00	Essa	617-435-8625	SHAWN	1 GEICO XD
12/13/18	9:00AM			0171106.00	Santosousso	781-857-0090	DOMINGA	1 Concord G
12/13/18	9:00AM			0171093.00	Thalheimer	774-480-5521	SHAYNE	1 TRAVELEI
12/13/18	9:12AM			0171100.00	Enterprise Rental	617-469-4600	ANTHONY M	3 Enterprise
12/13/18	10:40AM			0171102.00	Enterprise Rental	617-469-4600	ANTHONY M	3 Enterprise
12/13/18	11:17AM			0171103.00	PRIME TOYOTA U	111-111-1111	ANTHONY M	2 PRIME TO
12/13/18	12:26PM			0171105.00	Roos	617-283-3516	SHAYNE	3 Pure
12/13/18	2:56PM			0171098.00	Askari	617-640-3980	SHAYNE	1 GEICO XD
12/13/18	3:12PM			0171044.00	Enterprise Rental	617-469-4600	ANTHONY M	2 Enterprise
12/13/18	3:12PM			0170846.00	VOID ENTERPRISE	617-469-4600	ANTHONY M	5 Enterprise
12/13/18	3:12PM			0170847.00	Lyons	617-680-1034	TONY	3 TRAVELEI
12/13/18	4:22PM			0171024.00	Ratzlaff	781-354-7056	SHAWN	2 GEICO XD
12/13/18	4:59PM			0171061.00	Collymore	617-755-2094	SHAWN	4 GEICO XD

Calendar Filters:

- ☒ Assignment
- ☒ Estimate
- ☒ Authorization
- ☐ In Shop Holds
- ☒ Blueprint
- ☒ Dispatch
- ☒ Scheduled In
- ☒ Scheduled Due
- ☐ Comeback RO
- ☒ Total Loss RO's
- ☒ Completed RO's
- ☒ Delivered RO's

Body: 63.59 Paint: 70.70 Frame: 4.50 Mech.: 0.00 Labor: 138.79 Est.: 24,518.58

Est. Lost Sales: ☒ Do Not Show ☐ Show Lost Sales ☐ Show Only Lost Sales

Convert Contact/Writer and Insurance Filters Forecast Insert Change Delete

Filter Contact/Writer: All Selected Ins. Company: All Selected RO Print Print Info Print Auth. Close

## VEHICLE DESIGNATION COLOR CODE

<b>BURGUNDY</b>	Assignments
<b>RED</b>	Estimates (Appointments)
<b>YELLOW</b>	Scheduled in (drivable preorder)
	<b>Staging</b>
<b>LIGHT BLUE</b>	- Waiting for authorization (Cust/Ins)
<b>DARK BLUE</b>	- Waiting for blueprints
<b>PURPLE</b>	- Waiting for parts
<b>GREEN</b>	Scheduled Due (In-shop)
<b>ORANGE</b>	Completed ROs(Not delivered)
<b>LIME GREEN</b>	Completed ROs(Delivered)
<b>GREY</b>	Total loss ROs
<b>TEAL</b>	Comeback ROs
<b>LIGHT BLUE / GREEN</b>	Insurance Hold

## PROPER RO/VEHICLE LOCATIONS ON THE CALENDAR:

- ASSIGNMENTS** - Must not be behind current date
- ESTIMATES** - Must not be behind current date
- AUTHORIZATION** - Must not be more than one day behind  
(AUTH CUST, AUTH INS)
- INSR HOLD** - Must have detailed notes describing approval activity every day
- BLUEPRINT** - No more than one day behind current date
- ON HOLD** - Must have detailed notes describing activity every day
- SCHEDULED IN** - Must not be behind current date
- SCHEDULED DUE** - Must not be behind current date
- COMEBACK RO** - Must not be behind current date
- COMPLETED** - No more than one day behind current date
- TOTAL LOSS** - Can be on any date other than future dates
- DELIVERED** - No more than one day behind current date

## OFFICE STAFF RESPONSIBLE FOR CALENDAR UPDATES:

- CUSTOMER SERVICE:** Assignments, Estimates, Scheduled In, Authorization
- WRITER/ESTIMATOR:** Auth, Insr Hold, On Hold, Scheduled Due, Completed, Delivered
- PRODUCTION:** Blueprint, On Hold, Scheduled Due, Comeback
- TECHNICIANS / QC:** Scheduled Due, Completed
- MANAGER:** All RO's



## PARTS

A great parts department makes a great body shop. Having the proper ratio of manpower to revenue ensures that the parts department does not cause a bottleneck in the collision center. Based on industry standards we recommend one parts person for every \$150 - \$200k in monthly shop revenue.

Parts personnel are responsible for ordering, receiving, returning, dispatching, blueprinting, and posting of the invoices in a timely manner (within 20 minutes of receipt). Proper manpower is essential to a successful collision center.

Filter Options

Date Created -

Starting Date:

6/04/16

...

Ending Date:

6/08/21

...

All Dates

Vehicle Location -

☒ Car In Shop
 ☐ Schedule In
 ☒ Staging

Display ROs -

☒ No Parts Ordered
 ☒ Supplement Order
 ☒ Parts to Receive

☒ Part To Return
 ☒ Core To Return
 ☒ Receive Credit

Writer -

☒ All
 ☐ Selected

Insurance -

☒ All
 ☐ Selected

Make -

☒ All
 ☐ Selected

by RO

by Date In

by Date Due

RO	Last Name	Writer	Insurance Company	Make	Date In	Date Due	No Order	Order	Receive	Return
0034049.00	HARSTAD	PAULO	WESTERN NATIONAL	HYUN	1/13/20	2/25/20	0	16	30	0
0034073.00	Akunnas	DAVE	GEICO	HOND	1/22/20	2/14/20	0	1	20	1
0034004.00	THOMPSON	PAULO	CUSTOMER PAY	FORD	1/30/20	2/07/20	1	0	2	0
0034095.00	OJO	DAVE	STATE FARM	HOND	2/04/20	2/10/20	0	1	5	0
0034101.00	Reeves	SARA	AMERICAN FAMILY	Honda	2/05/20	2/11/20	0	2	0	0
0034102.00	FRIGAARD	DAVE	AUTO CLUB INSUR	HYUN	1/13/20	2/07/20	0	23	27	0
0034116.00	Patel	PAULO	GEICO	HOND	1/13/20	2/07/20	10	0	0	0
0034121.00	LUKAS	DAVE	AMERICAN FAMILY	Kia	1/14/20	2/05/20	0	3	38	1
0034147.00	Hodgeman	DAVE	AMERICAN FAMILY	Honda	1/15/20	1/21/20	0	0	0	10
0034157.00	BLUHM	SARA	THE GENERAL	Ford	1/15/20	2/07/20	0	1	18	0
0034158.00	HANSEN	SARA	STATE FARM	HOND	1/15/20	2/03/20	0	5	34	1
0034164.00	UMER	SARA	STATE FARM	HYUN	1/15/20	1/31/20	2	0	0	0
0034190.00	HUBBARD	PAULO	MTC	HOND	1/20/20	2/06/20	0	1	23	0
0034205.00	SILBERSACK	DAVE	STATE FARM	HOND	1/21/20	2/19/20	0	2	37	4
0034221.00	ANDERSON	BOB	HONDA SERVICE	HOND	1/23/20	1/29/20	0	3	0	0
0034236.00	Ahlman	PAULO	AMERICAN FAMILY	Ford	1/24/20	2/06/20	0	2	22	0
0034240.00	Sets	SARA	GEICO	HOND	1/21/20	2/13/20	0	1	2	0

RO Part Counts:

6

4

16

5

2

6

RO Number:

Change

Print

Close

## ROME

# Parts Tasks

## Parts are Ready to Order

- Action** Check order parts box in RO
- RESPONSIBILITY** Writer/ Estimator
- RESULT** Triggers the ordering process from the RO

## Prioritize Parts Ordering

- Action**
1. Go to Parts screen by clicking the Parts button
  2. Check “No Parts Ordered” and “Some Parts Ordered”
  3. Select Boxes in the following order:
    - 1st Priority: “Car in Shop “ by earliest “Date Due”
    - 2nd priority: Cars in “Stagin” by earliest “Date in”
    - 3rd Priority: Cars Not in Shop (drivable preorder) by earliest date in
- RESPONSIBILITY** Parts Person
- RESULT** Prioritizes ROs by order in which parts should be ordered

## Order Parts in RO

- Action**
1. Tag mission critical parts
  2. Create purchase order and filter by part type
  3. Check default cycle time for parts arrival date/time within PO
- RESPONSIBILITY** Parts Person
- RESULT** Parts ordered

## Receive Parts in RO

- Action**
1. Verify accuracy of parts to invoice/PO
  2. Post/balance invoice to PO
  3. Scan invoice into electronic file jacket
  4. Print tech dispatch sheet
  5. Deliver/verify parts accuracy with technician
- RESPONSIBILITY** Parts Person
- RESULT** Accurate parts are received, job costing for part is in RO, accounts payable updated, parts inventory established

## Return Parts

- Action**
1. Create credit memo
  2. Signature from vendor on credit meme for return
  3. Scan signed credit meme into electronic file jacket
- RESPONSIBILITY** Parts Person
- RESULT** Open credits established

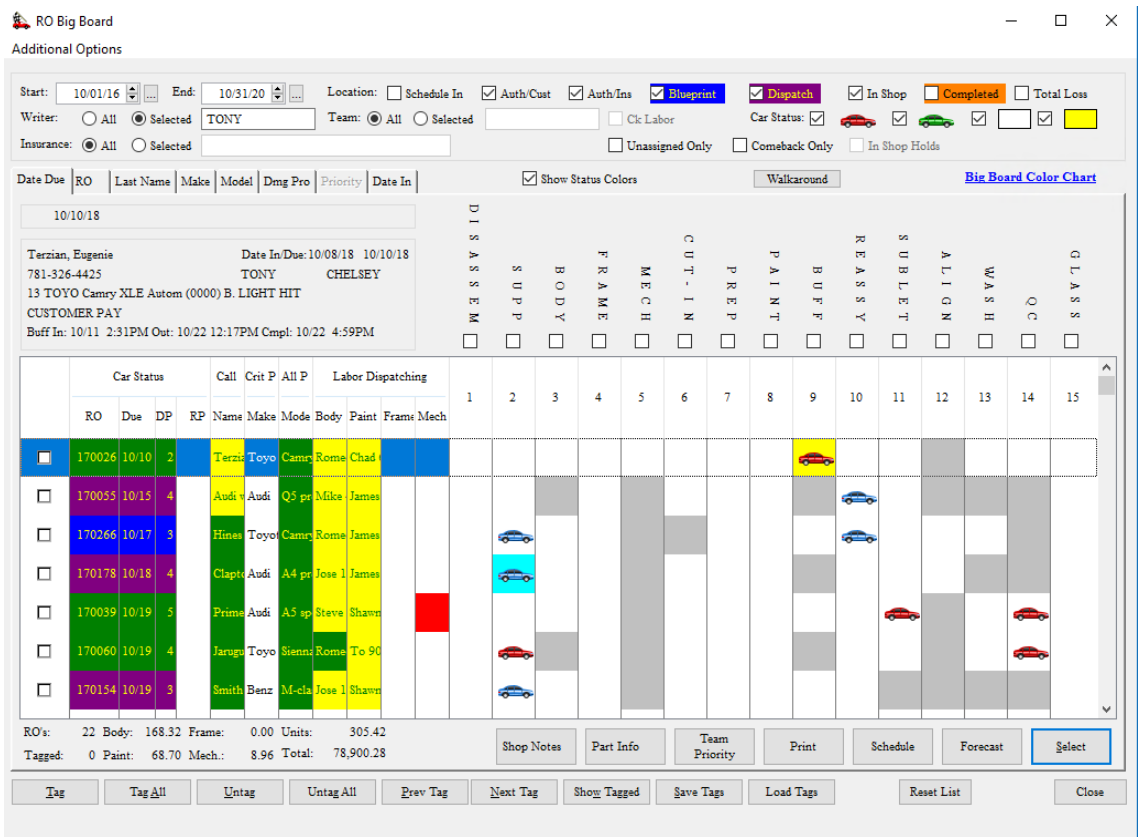
## Blueprinting

- Action** Review/comment-final estimate at the point of disassembly
- RESPONSIBILITY** Parts Person
- RESULT** Accurate understanding of parts needed for repair



# PRODUCTION-BIG BOARD

The Big Board offers the most comprehensive view of the entire collision center. On a single screen you can see if customer service calls have been made, if mission-critical parts have been delivered, if all the parts have been delivered, what cars to dispatch, what needs to be done on each vehicle today, if the vehicle is on schedule, by department, by hours, by dollars, by insurance company, by technician, and by a writer.



The Big Board can be sorted by vehicle designation, allowing rapid, precise and efficient decision-making, for blueprinting, dispatching, and production management. All of the information is updated live so you can make decisions that have an immediate impact on your facility.

Updating the Big Board with a tablet during walk around is an invaluable tool. You can set the workflow for the entire shop for daily production and automatically update technician stations. The technician station provides an up-to-the-minute task list for each tech. As the vehicle moves through production the big board will generate alerts via email or texting to the proper management personnel of any delays on the shop floor so prompt action can be taken to get things back on track.

# Production Decision-making

## Initiate Blueprinting

**COMPLETED BY WITHIN** 1 - 3 hours from time of vehicle possession

- Action**
1. Check "Blueprint" box
  2. Write estimate at the car
  3. All involved parties review estimate at the car
  4. Update staging box:waiting for parts in repair order

**RESPONSIBILITY** Production or Writer

**RESULT** Full vision of the pre-collision condition of the vehicle

## Initiate Dispatching

- Action**
1. Check "waiting for parts" box
  2. Check mission critical parts column for availability
  3. Run technician load level report/select technician/assign labor
  4. Update in shop checkbox in repair order
  5. Print shop repair order/copy of estimate/give to technician
  6. verify accurate data due

**RESPONSIBILITY** Production/Writer

**RESULT** Vehicle is in production




## Initiate Walk Around

- Action**
1. Define production tasks per vehicle per technician on the Big Board screen
  2. Verify vehicle inventory
  3. Make sure all cars are on schedule (Green)
  4. Verify accurate vehicle designation
  5. Verify accurate Date Due







**RESPONSIBILITY** Production/Writer

**RESULT** Stage is set for daily tasks to be completed by technicians





### Car Status/ RO number

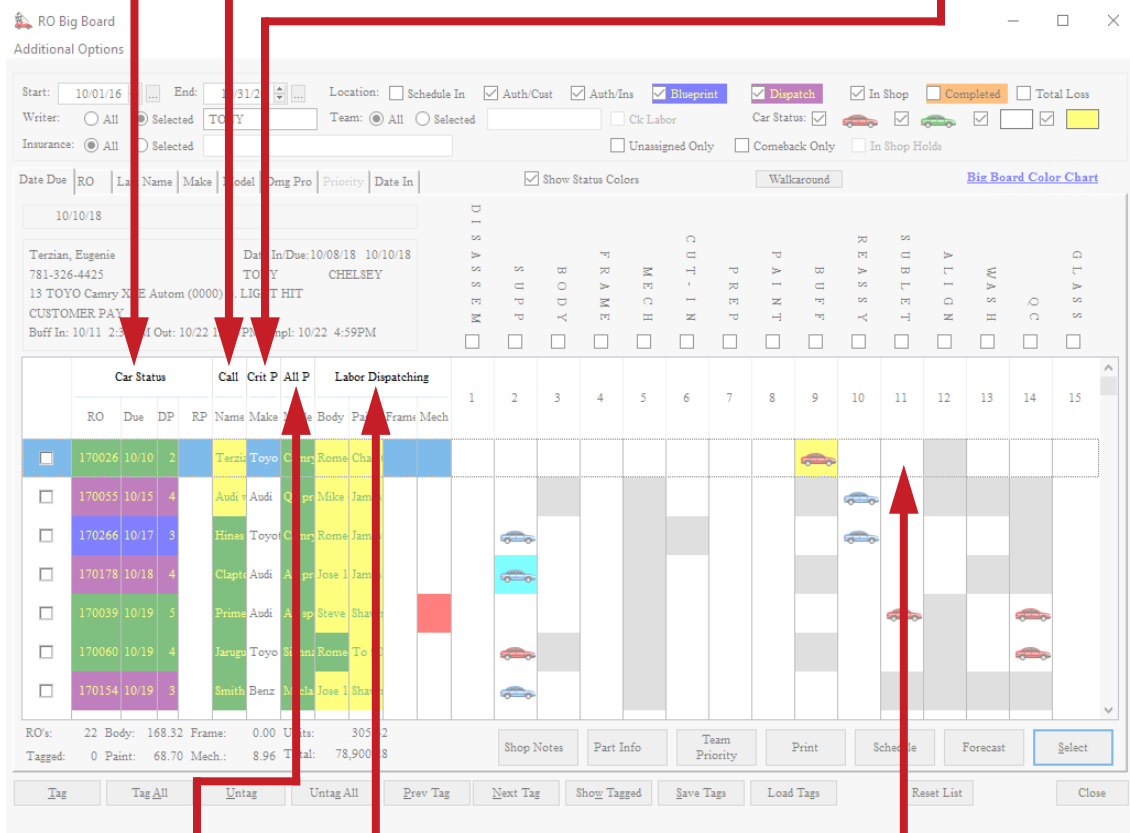
-  Blueprint
-  W Parts
-  Completed

### Customer Service Calls/Name





-  Call for Due date update
-  Call for due date & schedule
-  Scheduled callback
-  Customer callback is current
-  Customer requested callback
-  Task status change callback

### Car Status/ RO number





-  No critical part on the job
-  No critical parts received
-  Some critical parts received
-  All critical parts received







### All parts List/Model

-  No parts on the job
-  No parts received
-  Some parts received
-  All parts received

### Labor Dispatching/Tech

-  No labor
-  No labor assigned to tech
-  Some labor assigned to tech
-  All labor assigned to tech

### Task Status

-  Car in staging
-  Car on schedule
-  Car behind schedule
-  Car stalled

# CUSTOMER SERVICE



Customer service is essential in developing new and ongoing relationships. By taking advantage of the emailing, texting, dynamic call logs and integration with the ARMs system, you have many ways to maintain contact and consideration with your partners and customers. These contacts should be made in a timely manner on a daily basis.

Callbacks - Date 38 Task Call 0 Reg. 59 Return 0

Set Existing Callbacks

Filter Options

Date In - Starting Date: 10/23/19 Ending Date: 10/23/20 All Dates

Vehicle Location - ☒ Car In Shop ☐ Schedule In ☒ Staging

Display ROs - ☒ Date Due Changed ☒ Task Status Call ☒ Regular Callback ☐ Callback Current

☒ Show Customer Call Regardless of Date/Location/Callback Status

Writer - ☒ All ☐ Selected

Insurance - ☒ All ☐ Selected

Repair Orders

RO	Last Name	Writer	Contact By	Home Phone	Work Phone	Cell Phone	Date Due	Callback
0034004.00	LUNDBERG	SARA	Phone	952-738-1200			1/11/20	1/13/20
0034049.00	HARSTAD	PAULO	Phone	218-234-1457			2/25/20	2/13/20
0034073.00	Akunna	DAVE	Phone	832-420-8069			2/14/20	2/12/20
0034084.00	THOMPSON	PAULO	Phone	952-686-8166			2/07/20	2/07/20
0034086.00	SUWAN	DAVE	Phone	651-633-4560	651-249-3224		2/07/20	2/14/20
0034088.00	BERG	DAVE	Phone	651-429-9525	651-271-7906		2/05/20	2/07/20
0034093.00	LOANEY	SARA	Phone	651-315-9826	651-315-9826		2/07/20	1/13/20
0034095.00	OJO	DAVE	Phone	202-460-5791	202-460-5791		2/10/20	2/11/20
0034101.00	Reeves	SARA	Phone	123-123-1234			2/11/20	1/13/20
0034102.00	FRIGAARD	DAVE	Phone	651-489-9517			2/07/20	2/12/20
0034116.00	Patel	PAULO	Phone	469-618-4527	469-618-4527		2/07/20	1/24/20
0034121.00	LUKAS	DAVE	Phone	651-348-0800			2/05/20	2/10/20
0034147.00	Hodgeman	DAVE	Phone	763-228-3028			1/21/20	1/21/20

RO Callback Counts: 38 0 59 0 RO Number: Callback Change

Print Callbacks Manual Mail List View Cust Notes Close

## Calls: Order of Importance

**Type:** Inquiry calls

**Color:** Blue

**Made when:** Several times per day

**Responsibility:** Writer or Estimator

**Result:** Customer inquiry is answered in a timely manner

**Type:** Date change calls

**Color:** Red

**Made when:** Before lunch

**Responsibility:** Writer or Estimator

**Result:** Customer is informed of new delivery date and why

**Type:** Vehicle Status

**Color:** Orange

**Made when:** Automatically created when Big Board production tasks are updated. This is not turned on by default and must be setup by Rome Support if desired. Any of the production tasks can trigger this event when started and/or completed.

**Responsibility:** Generated by technician station via email and/or texting

**Result:** Customer is kept informed throughout the repair process with up to the minute status changes diminishing the number of inquiry calls received on a daily basis

**Type:** Daily callbacks

**Color:** Yellow

**Made When:** Before lunch

**Responsibility:** Customer Service

**Result:** Customer is informed vehicle is on schedule

# Calls

<b>TYPE</b>	Daily callbacks
<b>COLOR</b>	Yellow
<b>MADE WHEN</b>	Before lunch
<b>RESPONSIBILITY</b>	Customer Service
<b>RESULT</b>	Customer is informed vehicle is on schedule
<hr/>	
<b>TYPE</b>	Date change calls
<b>COLOR</b>	Red
<b>MADE WHEN</b>	Before lunch
<b>RESPONSIBILITY</b>	Writer or Estimator
<b>RESULT</b>	Customer is informed of new delivery date and why
<hr/>	
<b>TYPE</b>	Inquiry calls
<b>COLOR</b>	Blue
<b>MADE WHEN</b>	Several times per day
<b>RESPONSIBILITY</b>	Writer or Estimator
<b>RESULT</b>	Customer inquiry is answered in a timely manner
<hr/>	
<b>TYPE</b>	Vehicle Status
<b>COLOR</b>	Orange
<b>MADE WHEN</b>	Automatically generates when Big Board tasks are started or completed (must be set up)
<b>RESPONSIBILITY</b>	Generated by Big Board updates, Easy Technician App or Tech Station updates.
<b>RESULT</b>	Customer is kept informed throughout the repair process with up to the minute status changes diminishing the number of inquiry calls received on a daily basis. These updates can be linked to automatic text and email for internal users, customers and outside insurance contacts.

# WORKFLOW

## Assignments

### ACTION

- EMS assignments into calendar
- Call potential customer for estimate appointment

**RESPONSIBILITY** Customer Service

## Appointments (estimate appointment)

### ACTION

- Write estimate at car with customer
- Close deal, get keys or set appointment for drop off

**RESPONSIBILITY** Writer

## Follow up calls

### ACTION

- Assignments that are not set for appointment
- Appointments that were not closed
- Four attempts before selecting lost sale

**RESPONSIBILITY** Customer Service

## Staging - Easy Check In

### ACTION

- Update customer information
- Get authorization from customer

**RESPONSIBILITY** Customer service

### ACTION

- Verify prior damage/ customer signature
- Take photos of damage and prior damage, current mileage and fuel, warning lights ect

**RESPONSIBILITY** Writer

## Staging

### ACTION

- Tag Keys, make sure “Parts”, “Authorization” and “Blueprint” are checked
- Print and place ticket in windshield
- Scan all documents in the file jacket

**RESPONSIBILITY** Writer or Customer Service

### ACTION

- Dispatch vehicle for blueprint
- Technician notifies estimator disassembling is complete

**RESPONSIBILITY** Writer or production

### ACTION

- Convert final estimate into Rome
- Confirm accurate date due
- Call customer with delivery date

**RESPONSIBILITY** Writer

**ACTION** Monitor master parts ordering screen for ordering and receiving

**RESPONSIBILITY** Parts personnel

## Production

### ACTION

- Check “In Shop” to dispatch vehicle for repair
- Assign labor to technician

**RESPONSIBILITY** Writer or Production

**ACTION** Dispatch parts to technician

**RESPONSIBILITY** Parts personnel

**ACTION** Update technician station as work is completed

**RESPONSIBILITY** Technician

### ACTION

- Monitor vehicle for production problems
- QC vehicle
- Post completed date

**RESPONSIBILITY** Writer or Production

## Delivery

**ACTION** Call Customer for pick up

**RESPONSIBILITY** Writer or Customer Service

**ACTION** Verify final paperwork

**RESPONSIBILITY** Writer

### ACTION

- Cashier ticker
- Postdate out on repair order
- Post delivery date on repair
- Scan in payment

**RESPONSIBILITY** Customer Service

**ACTION** Daily walk around

**RESPONSIBILITY** Production or Writer

## ROME



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