# SCHEDULING (CALENDAR)

ROME MANAGEMENT USER GUIDE

SCHEDULING (CALENDAR)

Rome Management has a calendar that is used to set estimate appointments, schedule drop-offs and track when cars should be delivered.

The calendar is accessed by pressing the Scheduling button in the row of icons at the top of the main screen. This will open the Appointment Calendar screen that will display the current month and the current day will be highlighted.
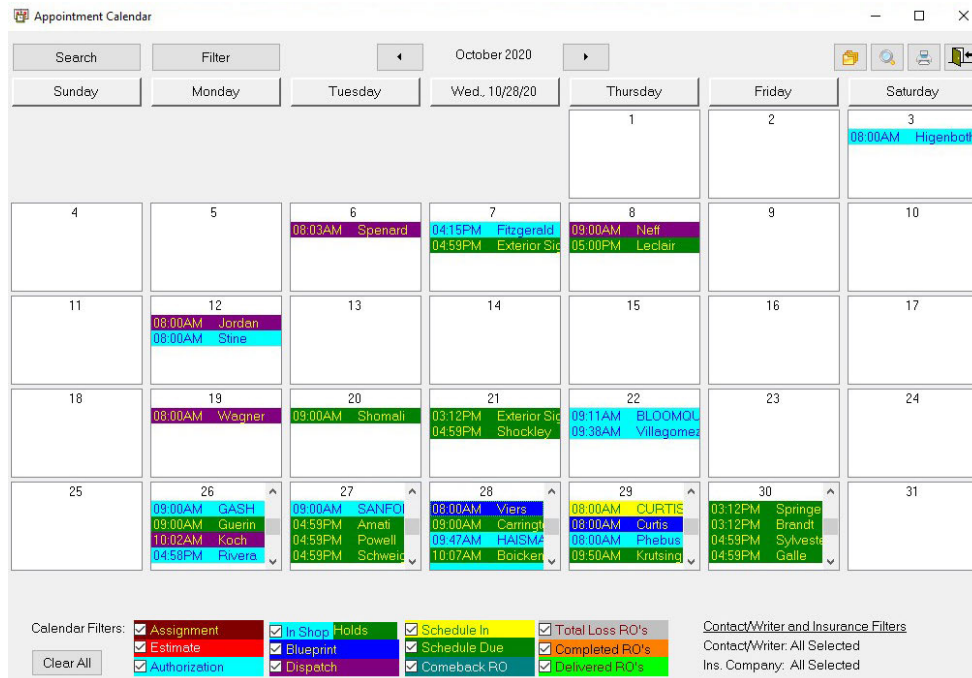
CALENDAR SCREEN

The calendar screen is first displayed with the current month and the current day highlighted.

Search Button - Searches for appointments (see Finding an appointment below)

Filter - Filters the calendar by writer or insurance company

Month arrows - The arrows to either side of the month will allow you to scroll the display to different months

Folder Icon - Will allow you to type in what month you want to display

Magnifying glass icon - When in the month display, this will change to a week display. When in the week display, this will open the daily display.

Printer Icon - Prints out a calendar report

Door Icon - Closes the calendar

Calendar filter - Filter the calendar to show different types of calendar entries.

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Color Codes:

RO's can be one of six different colors according to what status they are in. It is important to get to know what the colors mean so you can see what is going on in the shop at a glance.

Red - Red entries are usually used to track appointments for estimates. Red entries do NOT have a Repair Order associated with them.

Yellow - Yellow entries denote when a car is scheduled to be dropped off at the shop. There will be a RO associated with this entry. That RO will have an entry in the Date In field and that date will be where the yellow entry will appear on the calendar.

Blue - Blue entries indicate a car that is in Staging. Staging is for cars that are on the premises but not yet ready to go into production because they are waiting on parts or approval. ROs with a Date In in the past and the Staging box checked will show as blue on the date entered the Date In field.

Green - Green entries indicate cars that should be ready to be delivered on the date of the entry. RO that have the In Shop Boxed checked and an entry in the Date Due field will show up in green on the date that is in the Date Due field.

Orange - Orange entries are jobs that have been completed but have not been delivered or dated out. ROs that have the In Shop checked and an entry in the Date Completed field will show up in orange on the date in the Date Due field.

Gray - Gray entities are for jobs that have been marked as total loss.

Let's go over an example of a repair passing through all of the different calendar entries so you can better understand the proper way to use the calendar.

A customer calls up and says they hit a boar and they need their truck fixed. Amazingly the truck is still drivable and they want to bring it in on Tuesday Oct 30th for an estimate. You would create an appointment on Tuesday and a red entry would be displayed on Tuesday. On Tuesday the customer comes in, gets the estimate and agrees to have you fix the car. However he doesn't want to miss the first day of duck season tomorrow so he will bring the truck back in on Thursday. You convert the calendar entry to an RO and set the Date In field to 11/01/07. The red calendar entry on Tuesday is changed to a yellow calendar entry on Thursday. Thursday comes and goes and no truck gets dropped off. When you open the calendar on Friday you have a yellow entry on a previous day. This is a warning that something is not right, so you call the customer and they say they couldn't make yesterday they will be in this afternoon. You change the Date In to 11/02/07 and the yellow entry moves to Friday. The truck comes in Friday afternoon but there is no time to do a teardown so you make sure the staging box is checked and leave it for Monday. On Monday you see there is a blue entry on Friday so you make sure the teardown gets done. No additional damage is found and the parts are here so the car is put into production by checking the In Shop check box. The blue entry on Friday is changed to a green entry on the Due date which is Wednesday 11/7 /07. Wednesday the truck is completed and 11/07 /07 is entered in the Date Completed. The green entry will change to an orange entry, and remain on the same day. The next day you see an orange entry on a previous day which is another warning that something is wrong. You call the customer and they mumble something about a duck blind and fire and say they will come in today. The customer picks up the car, you enter 11/08/07 in the Delivery Date and the Date Out fields the job is closed and will no longer appear on the calendar.

CREATING AN APPOINTMENT

1. To create an appointment (red) in the calendar double click on the day you want to schedule the appointment. The Calendar Entry screen will appear.

2. Press Insert to create an appointment. The Calendar Appointment window will be displayed.

3. The only fields that are required to create the appointment are the date and time. However since Rome Management has a feature that lets you convert a calendar entry to a repair order inputting accurate information in here can save you from doing it later.

4. When you are done inputting the information press OK to create the appointment.

CONVERTING AN APPOINTMENT TO A REPAIR ORDER

If you have an appointment in the system and the customer is going to let you repair the car you can convert a red calendar entry into a Repair Order automatically.

1. Double click the day the appointment is on and open the Calendar Entry screen.

2. Highlight the appointment you wish to convert and hit the Convert button.

3. A window will be displayed letting you know the RO number and the customer name. The RO number will be the next sequential number in your RO list. You are now ready for the estimator to import the estimate into this RO.

DISPLAYING BY WRITER OR INSURANCE COMPANY

If you want to display only a single writer's or insurance company's entries press the Filter button. Move the dot to Selected on whichever category or both. Type the name of the Writer or Ins Co you want, you can just type the first few letter and hit tab to pop the list of available selections. Hit OK and only entries for that writer or Ins co. will be displayed.

Filtering the calendar to show a certain calendar entry

On the monthly, weekly and daily displays there are colored check boxes for each different type of entry. These are for filtering the calendar display to show just the types of entries that are checked. So if you just want to see want cars are scheduled to come in you would uncheck all but the yellow box. If you wanted to see what was being delivered you uncheck all but green box.

Using the calendar to load balance the shop

When you look at the daily display, to the right of the colored check boxes is an area that calculates the hours and revenue for that day.

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FINDING AN APPOINTMENT

1. Click the Search button to find an appointment in the Calendar.

2. This will open the Calendar Appointment screen but the date range at the top will default to from the first appointment in the calendar to the last appointment so that every appointment in the system will be displayed.

3. Click one of the tabs at the top to do your search by. Type the first few letters of the item you are searching for and the highlight will move to any appointments that match the letters you typed.

For example: You click on the Customer name tab and type a "B" The highlight will drop down to the first entry that starts with B, Bass. Add an "R" and it will highlight the first entry that start with BR, Braun. Add an "O" and it will highlight the first entry that starts with BRO, Brown.

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The shop can use this to monitor how much business is coming in every day.

Body - Number of body labor units
Paint - Number of paint labor units
Frame - Number of frame labor units
Mech - Number of mechanical labor units
Labor - Number of total labor units
Est. - Total revenue in dollars

If you use the filters to just display yellow entries, the totals will be for just the yellow entries. So you can use the calendar to see how much business is coming in per day. If your shop can do 500 hours per week, instead of bringing all 500 hours in on Mon and Tues you can use the calendar to help spread the hours out over the week. For instance, when you get to 200 hours on Mon stop scheduling Mon and move new cars to Tues. This way you can schedule the remaining 300 hours over the next 3 days and not put such a tremendous load on the shop.

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