



VEHICLE DESIGNATION



2

VEHICLE DESIGNATION

ORDER/PRE-ORDER PARTS BUTTON

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.

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”.

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

First Name: James Cell: Des./Phone: Des./Phone: Spouse: Review RO

Last Name: Rome Fax: Des./Phone: Spouse: Review RO

Addr1: 25319 Winding Creek Court E-Mail: james@rometech.com

Addr2: E-Mail 2: Spouse: Review RO

City, ST, Zip: Baltimore MD 21100 Insurer: FARMERS Policy No: 9512587453A

Home/Work: 301-555-1212 410-555-1212 Adjuster: Date Loss: Review RO

Writer: Year: 21 Claim R. Claim No: 123456789-01

Writer 2: Prod Date: Source(s): DRP

☒ Call Cust Make: DODG Color: Black

Fleet Acct: Model: RAM 1500 4X2 CR Paint Cd: Notes Customer Supplmnt

PO: Style: 4D P/U Trim Cd: Shop Security

VIN: 1D3HB13T59S773063 Type: TK Engine: 8-5.7L-FI Paint Auto Mail Mech

Key Tag: Date Creatd: 10/06/21 Pay Resp Date Cmpl: Grand Total: 1,652.93

Unit: Date In: 10/06/21 Owner ☒ Date Out: Payments: 0.00

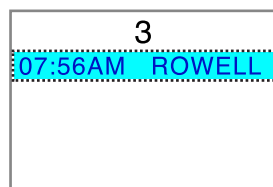
Mileage In: 5,432 In Shop: 10/06/21 Claimant ☐ Delivered: Deduct: 250.00 Balance: 1,652.93

Mileage Out: 0 Date O.P.: 10/11/21 Insured ☒ Shop ☐ Betterment: Balance: 1,652.93

ST Lic: MD RAMIT Date Due: 0 10/11/21 Time: 9:55AM

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.



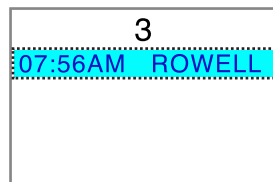
ROME

AUTH/INS DESIGNATION

The diagram illustrates the integration of three authentication/insurance (Auth/Ins.) modules into a central system. Three colored boxes (red, yellow, and green) at the top represent different Auth/Ins. providers. A large red arrow points from these boxes down to a software interface, indicating the flow of data or the integration point.

The software interface shown at the bottom includes a header bar with a truck icon and the text "RO (0002882 - 1D3HB13T595773063)". Below the header, there are several tabs or buttons: "Tools", "Est./Suppl", "PPD Alert", "Print", and "Multiple Print".

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



BLUEPRINT DESIGNATION

Blueprint

Blueprint

Blueprint

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 /

First Name: Cell:

Last Name: Fax:

Addr1: E-Mail:

Addr2: E-Mail 2:

City, ST, Zip:

Home/Work:

Writer: Year:

Writer 2: Prod Date:

☒ Call Cust ☐ Call ☒ Contact/Info Make:

Fleet Acct: Model:

PO: Style:

VIN: Type:

Key Tag: Date Creatd:

Unit: Date In:

Mileage In: In Shop:

Mileage Out: Date O.P.:

ST Lic: Date Due:

Status: ☒ Active ☐ Inactive ☐ Void

☐ Insr Hold ☐ Tow In ☐ Comeback RO

☐ Total Loss

Des./Phone:

Des./Phone:

Spouse:

Insurer: Policy No:

Adjuster: Date Loss:

Claim R.: Claim No:

Source(s):

Color:

Paint Cd:

Trim Cd:

Engine:

Pay Resp

Owner ☒

Claimant ☐

Insured ☒

Shop ☐

Date Cmpl:

Date Out:

Delivered:

Deduct:

Betterment:

Time:

Notes

Customer Supplmt

Shop Security

Office Man. Mail

Auto Mail

Paint Remarks

Status

Body Paint

Mech

Frame

Sublet

Parts

Body Paint

Mech

Frame

Sublet

Cost

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

3
07:56AM ROWELL

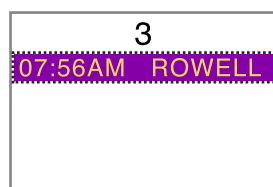
Proper Repair Order Designation:

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 buttons for 'Order/Pre-Order', 'Auth/Cust', 'Auth/Ins', 'Blueprint', 'On Hold' (highlighted in yellow), 'In Shop', and 'Completed'. A red arrow points from the 'On Hold' button in the legend above to the 'On Hold' button in the software. 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 'Status' section shows 'Active' and 'On Hold' (yellow). The 'Parts' section shows 'Security', 'Parts', 'Auto Mail', and 'Remarks'. The 'Grand Total' is 1,652.93 and 'Balance' is 1,652.93.

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.



ROME

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 displays the Repair Order (RO) software interface for RO No. 0002882.00. At the top, three colored boxes labeled 'In Shop' (red, yellow, and green) are shown with a red arrow pointing from the yellow box to the green box, indicating the transition process. The main window features a top menu bar with options like 'Tools', 'Est./Suppl', 'PPD Alert', 'Print', and 'Multiple Print'. Below this is a tabbed interface with 'Order/Pre-Order', 'Auth/Cust', 'Auth/Ins', 'Blueprint', 'On Hold', 'In Shop' (highlighted in yellow), and 'Completed'. The 'In Shop' tab is active, showing a detailed form for customer information (James Rome), contact details, insurance information (FARMERS), and vehicle details (DODG RAM 1500 4X2 CR). The 'Status' section shows 'Active' and 'In Shop' (highlighted in yellow). The 'Date Due' is set to 10/11/21. The 'Grand Total' is 1,652.93. The bottom of the window has a 'Level' tab selected, showing a list of tasks: 'Level', 'Layer', 'Parts' (highlighted in blue), 'Labor', 'Sublet/Misc', 'Schedule', 'Forecast', 'Profile', 'File Jacket', and a green 'A' button.

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.

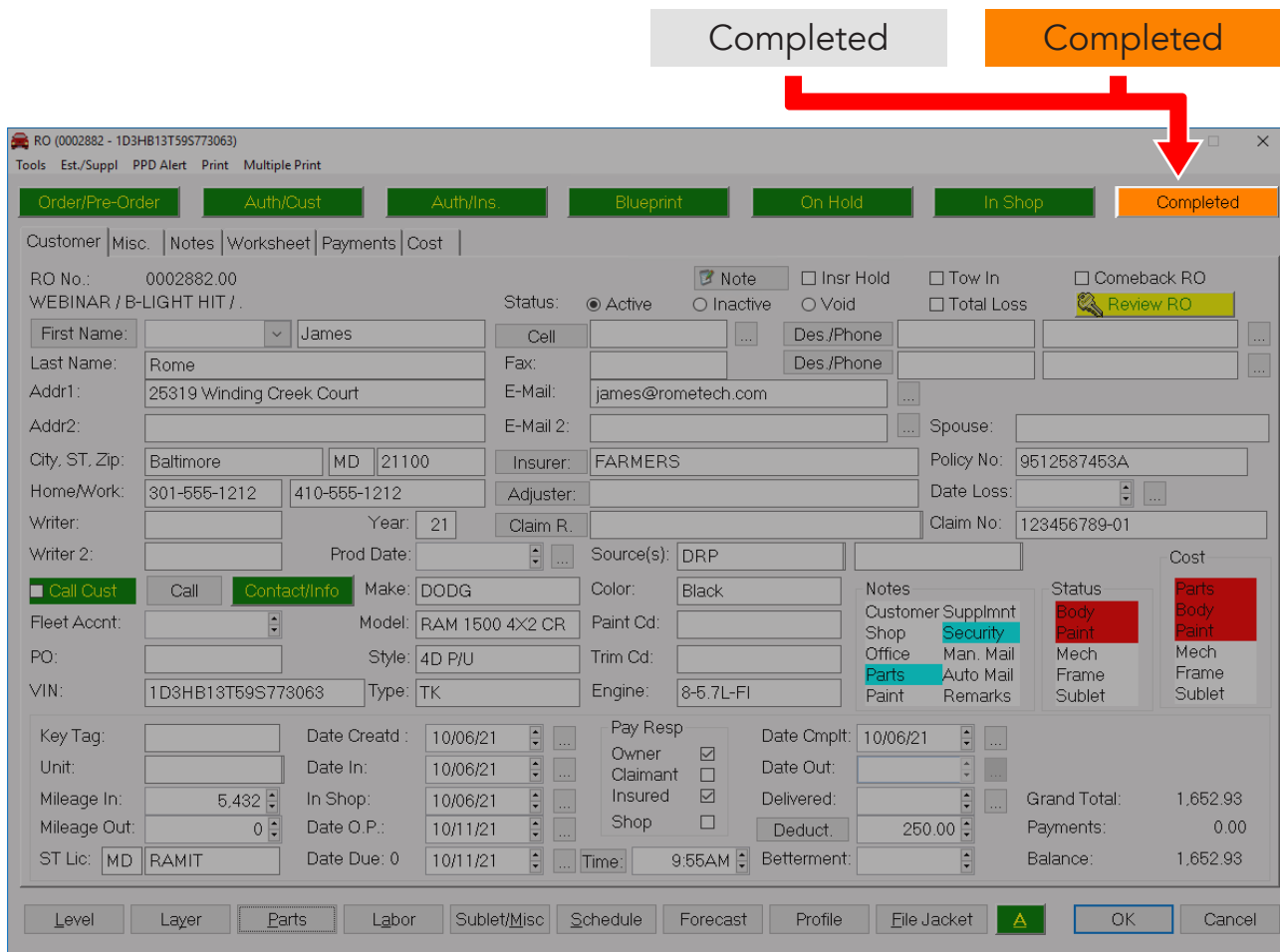
5
02:05PM ROWELL

ROME

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”.



The screenshot shows the Repair Order (RO) software interface. At the top, there are buttons for 'Order/Pre-Order', 'Auth/Cust', 'Auth/Ins.', 'Blueprint', 'On Hold', 'In Shop', and 'Completed'. The 'Completed' button is highlighted in orange. A red arrow points from the 'Completed' button to the 'In Shop' button, indicating the transition process. Below the buttons, there is a form with various fields for customer information, vehicle details, and repair status. The 'Status' field is set to 'Active'. The 'Date Completed' field is set to 10/06/21. The 'Grand Total' is 1,652.93. The 'Balance' is 1,652.93. The 'Parts' button is highlighted in orange.

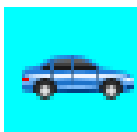
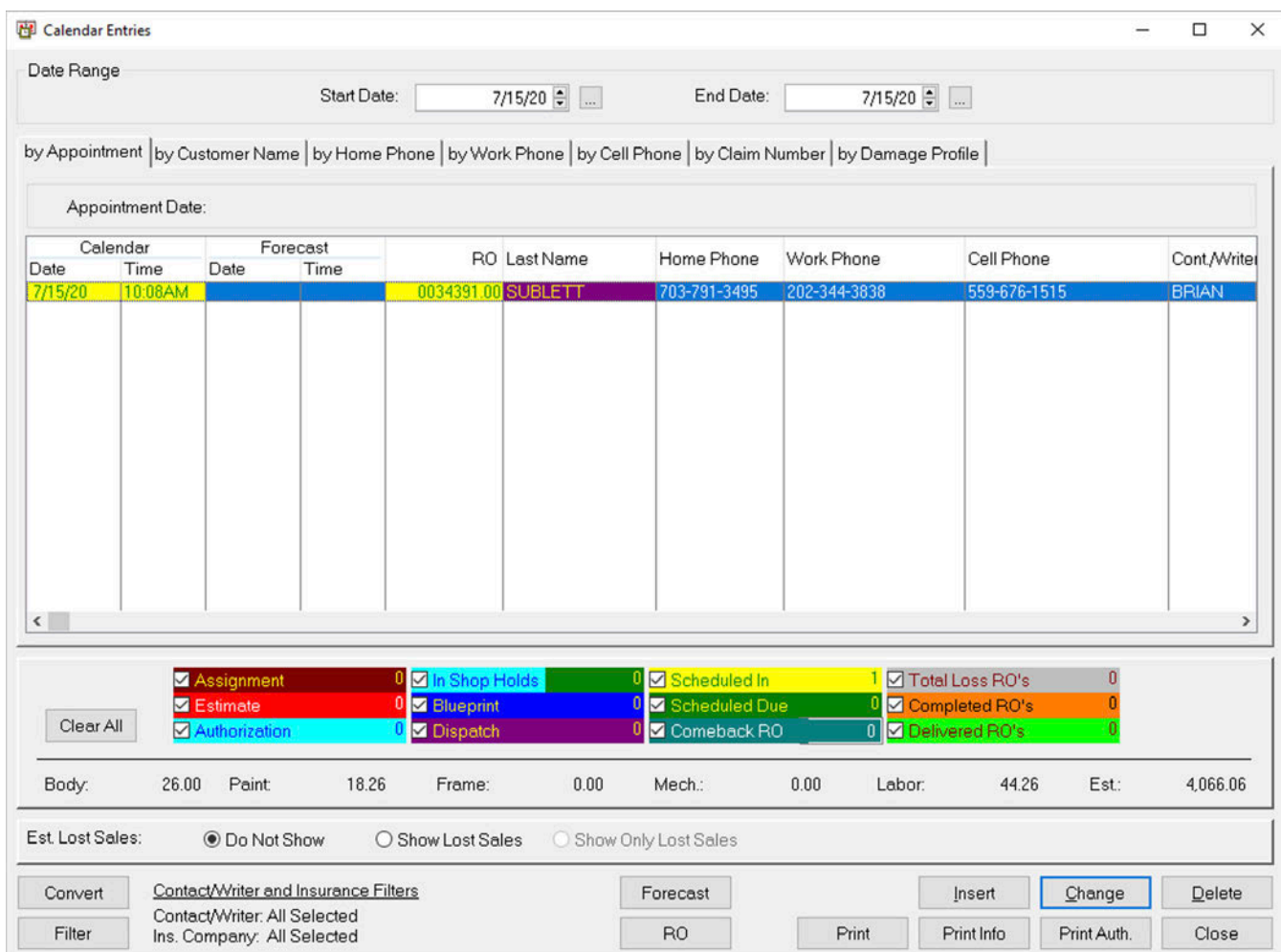
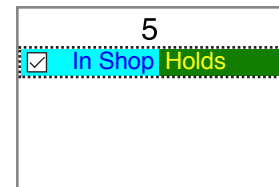
This RO will show on the calendar in “orange” on the RO date due.

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.



ROME

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.

Calendar: Monthly View

Appointment Calendar

Search Filter July 2020

Sunday Monday Tue., 7/28/20 Wednesday Thursday Friday Saturday

1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30 31

10:08AM SUBLETT

11:09AM Honda

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

Contact/Writer and Insurance Filters

Contact/Writer: All Selected

Ins. Company: All Selected

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 9 Monday 10 Tuesday 11 Wednesday 12 Thursday, 12/13/18 Friday 14 Saturday 15

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		2 METROPOLITAN
12/13/18	9:00AM			0171101.00	Andrews-Romain	617-637-9653		1 GEICO XD
12/13/18	9:00AM			0171097.00	Arce	813-476-2002		1 GEICO XF
12/13/18	9:00AM			0171095.00	Essa	617-435-8625		1 GEICO XD
12/13/18	9:00AM			0171106.00	Santosouso	781-857-0090		1 Concord G
12/13/18	9:00AM			0171099.00	Thalheimer	774-480-5521		1 TRAVELE
12/13/18	9:12AM			0171100.00	Enterprise Rental	617-469-4600		3 Enterprise
12/13/18	10:40AM			0171102.00	Enterprise Rental	617-469-4600		3 Enterprise
12/13/18	11:17AM			0171103.00	PRIME TOYOTA U	111-111-1111		2 PRIME TO
12/13/18	12:26PM			0171105.00	Roos	617-283-3516		3 Pure
12/13/18	2:56PM			0171098.00	Askari	617-640-3980		1 GEICO XD
12/13/18	3:12PM			0171044.00	Enterprise Rental	617-469-4600		2 Enterprise
12/13/18	3:12PM			0170846.00	VOID ENTERPRISE	617-469-4600		5 Enterprise
12/13/18	3:12PM			0170847.00	Lyons	617-680-1034		3 TRAVELE
12/13/18	4:22PM			0171024.00	Ratzlaff	781-354-7056		2 GEICO XD
12/13/18	4:59PM			0171061.00	Collymore	617-755-2094		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:

BURGUNDY	Assignments (from DRP's)
RED	Estimates (Appointments)
YELLOW	Scheduled in (drivable preorder)
Staging	
LIGHT BLUE	- Waiting for authorization (Cust/Ins)
DARK BLUE	- Waiting for blueprints
PURPLE	- Waiting for parts Production
GREEN	Scheduled Due (In-shop)
ORANGE	Completed ROs(Not delivered)
LIME GREEN	Completed ROs(Delivery)
GREY	Total loss ROs
TEAL	Comeback ROs
LIGHT BLUE / GREEN	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.

RO Parts - None 3 Suppl 5 Rcv 27 Ret 0 CoreR 0 Rcv

Filter Options

Date Created -

Starting Date: 6/23/19 ... Ending Date: 6/23/22 ... All Dates

Vehicle Location -

☒ Car In Shop ☐ Schedule In ☒ Staging

Display ROs -

☒ No Parts Ordered ☒ Supplement Order ☒ Parts to Receive

Writer -

☒ Part To Return ☒ Core To Return ☒ Receive Credit

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	Akunna	DAVE	GEICO	HOND	1/22/20	2/14/20	0	1	20	1
0034084.00	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	1/16/20	1/21/20	0	0	0	10
0034153.00	Goodland	SARA	AMERICAN FAMILY	Honda	2/04/20	2/13/20	2	0	2	2
0034157.00	BLUHM	SARA	THE GENERAL	Ford	1/16/20	2/07/20	0	1	18	0

RO Part Counts: 3 5 27 0 0 2 RO Number:

Change

Print

Close

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 “Stageing” 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

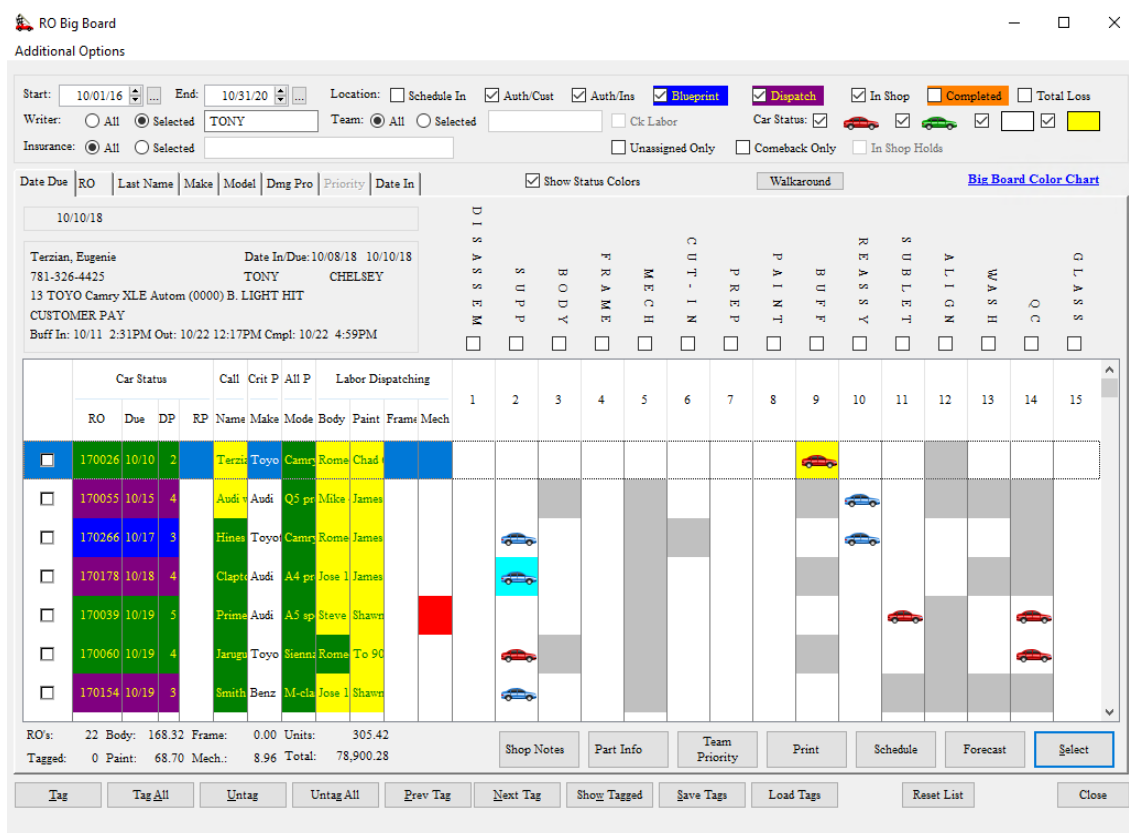
- ACTION**
1. Create credit memo
 2. Signature from vendor on credit memo for return
 3. Scan signed credit memo into electronic file jacket
- RESPONSIBILITY** Parts Person
- RESULT** Open credits established

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.

ROME PRODUCTION DESIGNATIONS

		
GREY		WHITE
		

RO Schedule
(Found in Repair Order)

Big Board Task

Stop Lights
(Schedule)

Production Decision-Making

Initiate Blueprinting

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

- Action**
1. "Blueprint" box should be yellow
 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 Writer

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

Initiate Dispatching

- Action**
1. Check "On Hold" box to find vehicles ready for body work
 2. Review mission critical parts column for availability
 3. Run technician load level report/select technician/assign labor
 4. Update "In Shop" checkbox in repair order once handed out
 5. Print shop repair order/copy of estimate/give to technician, Print - Shop RO
 6. Verify accurate data due based on forecast and original promise date

RESPONSIBILITY Production/Writer

RESULT Vehicle is in production "In Shop"

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

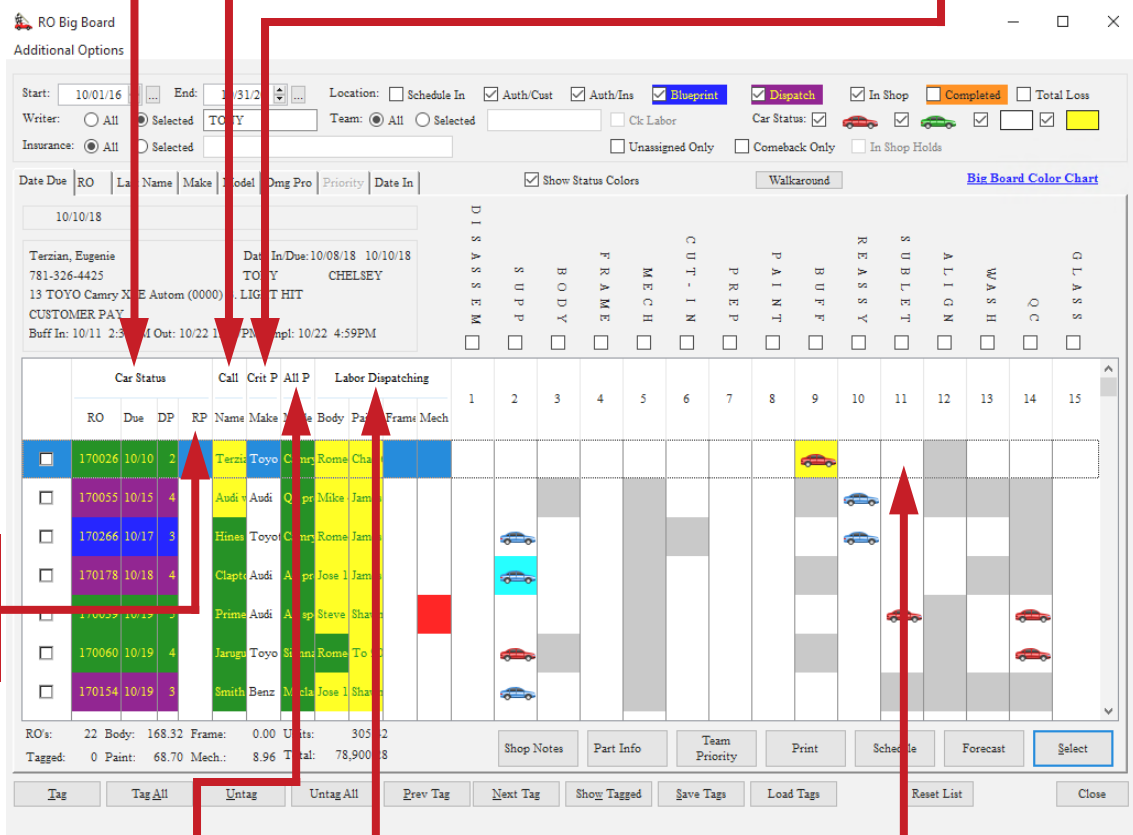
-  Blueprint
-  On Hold
-  Completed

Customer Service Calls/Name

-  Call for Due date update
-  Call for due date & schedule
-  Scheduled callback (Love call)
-  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







**Technician
Repair
Priority**





All parts List/Model

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

Labor Dispatching/Tech

-  No labor on the job
-  No labor assigned to tech
-  Some labor assigned to tech
-  All labor assigned to tech

Task Status

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

ROME

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	952-728-1200			1/11/20	1/13/20
0034049.00 HARSTAD	PAULO	Phone	218-234-1457			2/25/20	2/13/20
0034073.00 Akunne	DAVE	Phone	832-420-8069			2/14/20	2/12/20
0034086.00 THOMPSON	PAULO	Phone	952-686-8166			2/07/20	2/07/20
0034088.00 BLWAN	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 CJO	DAVE	Phone	202-460-5791	202-460-5791		2/10/20	1/13/20
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: 56 18 59 4 RO Number: Callback Change

Print Callbacks Manual Mail List View Cust Notes Close

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

Type: Inquiry calls

Color: Blue

Made When: Several times per day

Responsibility: Writer or Estimator

Result: Customer inquiry is answered in a timely manner

☒ Date Due Changed

Type: Date change calls

Color: Red

Made when: Before lunch

Responsibility: Writer or Estimator

Result: Customer is informed of new delivery date and why

☒ Regular Callback

Type: Daily callbacks

Color: Yellow

Made When: Before lunch

Responsibility: Customer Service

Result: Customer is informed vehicle is on schedule

☒ Task Status Call

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

☐ Callback Current

Type: Callback Current

Color: Green

Made when: The customer is already up to date based on the callback cycle time and proper documentation from the person who made the call. There is no actions at this time.

Responsibility: All

Result: Keeping customers informed decreases calls into the body shop for updates. Stressing the importance of being proactive instead of reactive.

ROME

CALLS BY PRIORITY

INQUIRY CALLS

COLOR	Blue
WHAT IS IT	The customer called and is asking for a call back
MADE WHEN	Several times per day
RESPONSIBILITY	Writer or Estimator
RESULT	Customer inquiry is answered in a timely manner

DATE CHANGE CALLS

COLOR	Red
WHAT IS IT	The date due has changed on the RO
MADE WHEN	Before lunch
RESPONSIBILITY	Writer or Estimator
RESULT	Customer is informed of new delivery date and why

DAILY CALLBACKS

COLOR	Yellow
WHAT IS IT	Love calls based on vehicle damage
MADE WHEN	Before lunch
RESPONSIBILITY	Customer Service
RESULT	Customer is informed vehicle is on schedule

VEHICLE STATUS*

COLOR	Orange
WHAT IS IT	Task movement on big board
MADE WHEN	Automatically generates when Big Board tasks are started or completed (must be set up)
RESPONSIBILITY	Generated by Big Board updates, Easy Technician App or Tech Station updates.
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. These updates can be linked to automatic text and email for internal users, customers and outside insurance contacts.

CALLBACK CURRENT

COLOR	Green
WHAT IS IT	Customer is up to date
MADE WHEN	The customer is already up to date based on the callback cycle time and proper documentation from the person who made the call. There is no actions at this time.
RESPONSIBILITY	All
RESULT	Keeping customers informed decreases calls into the body shop for updates. Stressing the importance of being proactive instead of reactive.

In Order of Importance

*Do not set up upon install unless requested

FRONT OFFICE WORKFLOW

Assignments

ACTION

- Call assignments from DRP (i.e. Progressive, State Farm, etc.)
- EMS/Manually Add assignments into calendar – No RO made
- Update comments in Mitchell or CCC1 and paste comment into Assignment in Rome

RESPONSIBILITY Customer Service

Appointments (estimate appointment)

ACTION

- Scheduling appointments for estimates M-F 1-4, every half hour, all lunches have to be taken before 1
- If not a DRP get insurance approval for the job before scheduling, if DRP schedule right away. Any job needs a DTP signed before scheduling and more importantly ordering parts.
- Close deal, get keys or set appointment for drop off

RESPONSIBILITY Estimators

Follow up calls

ACTION

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

RESPONSIBILITY Customer Service

Staging - Easy Check In

ACTION

- Update customer information
- Get authorization from customer
- Tag Keys, make sure “Parts”, “Authorization” and “Blueprint” are checked
- Scan all documents in the file jacket

RESPONSIBILITY Customer Service

ACTION

- Place windshield ticket on dashboard
- Verify prior damage/ customer signature
- Take photos of damage and prior damage, current mileage and fuel, warning lights ect
- Move vehicle to proper lot (a,b,c)

RESPONSIBILITY Estimators

Staging

ACTION

- Dispatch vehicle for blueprint
- Assign labor to the technician
- Technician notifies estimator disassembling is complete

RESPONSIBILITY Body Shop Manager/Production Manager and/or Technician

ACTION

- Convert final estimate into Rome
- Confirm accurate date due
- Call customer with potential supplement info and updated delivery date, put notes in Rome and any required ins notes (i.e progressive, AM FAM comments, ect.)
- Place the Vehicle designation to On Hold

RESPONSIBILITY Estimators

ACTION

- Monitor master parts ordering screen for ordering and receiving

RESPONSIBILITY Parts personnel



Production

ACTION

- Move vehicle designation from “On Hold” to “In Shop” to dispatch vehicle for repair

RESPONSIBILITY Production Manager

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 Detailer, Production manager, Writer

ACTION

- Daily walk around

RESPONSIBILITY Production Manager

ROME

Delivery

ACTION

- Review RO
- Check the vehicle designation is Completed (Orange)

RESPONSIBILITY Estimators

ACTION

- Verify final paperwork

RESPONSIBILITY Estimators

ACTION

- Call Customer for pick up

RESPONSIBILITY Customer Service

ACTION

- Take customer payment at pickup
- Insert Payment into RO
- Print 2 Detailed invoices
- Have customer sign one detailed invoice, they keep the other for their records
- Enter delivery date on repair
- Enter Date Out the RO
- Scan all documents to file jacket folders

RESPONSIBILITY Customer Service

Training Weekend Tasks

ROME LOGIN

1. Login to Rome with your first initial and last name as your login.
2. No password is required for now

ESTIMATING

3. Open your Estimating System (CCC1, Mitchel connect, ect.)
4. Select the Estimate to import and open the file
5. Go to Work file – EMS Export

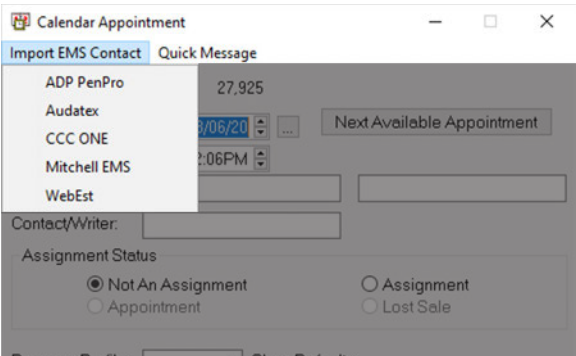
ROME APPOINTMENT

6. Open the Calendar
7. Find the date the vehicle came in or is being dropped off
8. Double Click the date

9. Select Insert

ROME

- 10. Import EMS Customer
- 11. Select the Estimate System (CCC1, Mitchell, Audatex)



- 12. Find the Estimate by Customers Last name on the list (VIN is usually RED)

- 13. Copy the Vehicle Model
- 14. Click OK

CCC ONE Estimates

by Owner Name | by Claim Number | by VIN | by Make | by Model | by License |

Owner Name	Claim Number	VIN	Make	Model	License	Estimate
FORD, JASON		UNK	TOYO	COROLLA CE		1,514.48
power, test		TRUUT28N741022944	AUDI	TT QUATTRO		5,174.03
SUBLETT, LTC CARL L	00239336500000038001	WBAGN63595DS59075	BMW	745LI	BASCLS	4,066.06
THEDFORD, CLIFF	34172810-01	1B7MC3362WJ198996	ODDG	BR3500 4x2 Q1 F1 G266		9,140.64
Yates,		UNK	TOYO	CAMRY LE		1,962.70

Select Close

- 15. Search for Vehicle Model in the list
- 16. If that Model is not in the list, click Insert
- 17. Add Description and Short Description and click close

Model

by Short Description |

Short Description

024

1.6EL

1.7EL

10

100

1000

100A

100CS

100CSQ

100D

100I

Select Insert

Description

Type

☐ Car Make ☒ Car Model ☐ Car Type

☐ ERA GOG Code ☐ Insurance

☐ Labor Operation ☐ Labor Tasks ☐ Location

☐ Lost Sale ☐ Misc. Charges ☐ Parts

☐ Payments ☐ Report Title ☐ Source

☐ Sublet

Description:

Short Description:

Bar Code:

Vendor Name:

OK Cancel Help

ROME APPOINTMENT TO RO CONVERSION

1. Highlight the Appointment to convert
2. Click Convert

Calendar Entries

Date Range Start Date: 9/07/22 End Date: 9/07/22

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

Appointment Date:

Calendar		Forecast		RO	Last Name	Home Phone	Work Phone	Cell Phone	Cont./Writer
Date	Time	Date	Time						
9/07/22	7:09AM			0034398.00	SUBLETT	703-791-3495	202-344-3838		

Clear All

<input checked="" type="checkbox"/> Assignment	0	<input checked="" type="checkbox"/> Insr Holds	0	<input checked="" type="checkbox"/> Scheduled In	1	<input checked="" type="checkbox"/> Total Loss RO's	0
<input checked="" type="checkbox"/> Estimate	0	<input checked="" type="checkbox"/> Blueprint	0	<input checked="" type="checkbox"/> Scheduled Due	0	<input checked="" type="checkbox"/> Completed RO's	0
<input checked="" type="checkbox"/> Authorization	0	<input checked="" type="checkbox"/> Dispatch	0	<input checked="" type="checkbox"/> Comeback RO	0	<input checked="" type="checkbox"/> Delivered RO's	0

Body: 26.00 Paint: 18.26 Frame: 0.00 Mech.: 0.00 Labor: 44.26 Est.: 4,066.06


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

Convert Filter Forecast RO Insert Change Delete Print Print Info Print Auth. Close

Contact/Writer and Insurance Filters
Contact/Writer: All Selected
Ins. Company: All Selected

3. The system will tell you the appointment has been converted to RO XXXXXX

Conversion Complete

 Calendar has been converted to RO 34398
LTC CARL L SUBLETT

OK

ADDING THE ESTIMATE TO THE RO

1. Select the RO you just created and click RO (bottom of the screen under Forecast)

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

2. Select the Est/Supp drop down and pick the system used to write the estimate (i.e. CCC1 Supplement)

RO (0034398 - WBAGN63595DS59075)

Tools Est/Suppl PPD Alert Print Multiple Print

- ADP PenPro Supplement
- Audatex Supplement
- ADP UDS Supplement
- CCC Supplement
- CCC ONE Supplement**
- Mitchell EMS Supplement
- Mitchell UDS Supplement
- Web-Est Supplement
- Change ROME Lines to Match Estimate
- Change Internal Estimate File Reference
- EMS Import Log
- EMS RO Memory Log

Auth/Ins Blueprint

Cost

ent RC

PRINTING

Status: ☒ Active ☐ Inactive

Cell

Fax:

E-Mail:

E-Mail 2:

20112-4696 Insurer: USAA

Adjuster:

Claim R.

Year: 05

Prod Date:

Source(s):

Call Cust Call Contact/Info Make: BMW Color:

Elect Agent: Model: Print Ed:

3. The box will open to select the correct estimate for that RO

CCC ONE Estimates

by Owner Name | by Claim Number | by VIN | by Make | by Model | by License |

Owner Name	Claim Number	VIN	Make	Model	License	Estimate
SUBLETT, LTC CARLL	002393365000000038001	WBAGN63595DS59075	BMW	745LI	BASCLS	4,066.06

Cleanse Convert Delete Delete All Close Help

4. Click Convert

5. Change the option to Update if Temp File Not blank

CCC ONE Import Options

Repair Order
☐ New
☐ Existing RO - Supplement
☒ Existing RO - Regular

Estimate Number
☐ Save Old
☒ Use New
☒ Merged Files

Level
1 2 3 4 5
Estimate ☐ ☐ ☐ ☐ ☐
Supplement ☐ ☐ ☐ ☐ ☐
Cust Pay ☒ ☐ ☐ ☐ ☐

RO: 0034397.00 Paul

Existing RO Customer/Insurance Information
☐ Do Not Update
☒ Update If Temp File Not Blank
☐ Update All Fields

Existing RO Vehicle Information
☐ Do Not Update
☒ Update If Temp File Not Blank
☐ Update All Fields

Estimating System Levels
☐ Do Not Use Levels from Estimating System
☒ Use All Levels from Estimating System - Even Locked Levels in ROME RO
☐ Use Levels from Estimating System - Only if Unlocked in ROME RO

Billing Profile: RETAIL HONDA
Damage Profile: Installation Options

☒ Use Dmg Limits to Select Dmg Profile ☐ Manually Match Estimate/Supplement Lines
☐ Go To RO ☒ Detailed Supplement

OK Cancel

6. Click OK

7. Say Yes to the Comeback question

Change Callback Cycle

? This RO is set up to allow changes to the callback cycle on the RO additional information screen. Do you want to change the existing callback cycle to match the callback cycle defined in the damage profile you have selected?

Yes No

8. Say No Thanks to the print question for Shop RO or Labor RO

Print Report

? Do you want to print a Shop RO or a Labor Worksheet?

Shop RO Labor Worksheet No Thanks

9. Update the fields in the RO

ROME

UPDATE THE RO

1. VEHICLE DESIGNATIONS – What is the car status?

- Needing teardown? (Blueprint)
- Waiting on Parts? (On Hold)
- Tech working on the car? In paint? (In Shop)
- Car not here? (Scheduled in)

2. MANDATORY FIELDS

- Double Check all the mandatory blue fields are filled in

- ADD THE OLD RO IN THE KEY TAG FIELD AND ON THE MIS TAB

- Update the Cashier Notes on how the customer is paying their copay (deductible)

3. LAST CUSTOMER CONTACT ADDED

- Press the “Call” Button – put the last note regarding the last contact you had with the customer.
- Pick the next date you want to call the customer with an update.

Home/Work:	503-969-9498		
Writer:	PAULO	Year: 00	
Writer 2:		Prod Date:	
<input type="checkbox"/> Call Cust	Call	<input type="checkbox"/> Contact/Info	Make: ACUR
Fleet Acct:		Model: a	
PO:		Style:	
VIN:	1	Type:	

RO Callback

Info: 0034397.00 Name: Scott

Callback Date and Time
Date: 9/27/22
Time: 1:02PM

New Customer Note | Old Customer Notes

Note:
Periodic Customer Call
RO Date Due Changed To 01/01/99
Spoke with Mrs. Smoth and let her know the car was approved for repair and we are waiting for parts

Email:
☒ No
☐ Email 1
☐ Cell Phone
☐ XPhone
☐ Customer Preferred
☐ Email 2
☐ XPhone 2

☐ Web Display












Tickler Schedule OK Cancel

4. BIG BOARD UPDATES

- Move the car through each task that has been completed using the schedule button and pressing the stop lights.

RO Big Schedule - 0034396.00

Tasks

 DISASSEMBLY	 SUPP	 BODY	FRAME	MECH
 CUT-IN	 PREP	 PAINT	 BUFF	 REASY
 SUBLET	 WASH	 QC	PDR	

Date Due (Read Only): 9/15/20 ☐ RO Completed

Quick Message Part Status Labor Tasks OK Close

ADD SCHEDULED IN RO'S TO THE CALENDAR

1. Look through your upcoming drop off schedule and create appointments for each drop off. Prioritize jobs with parts pre-ordered.
2. If there is an estimate, please add that into the RO by using the import function
3. Make sure to designate if the parts need to be ordered for those jobs.

R O M E

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