VEHICLE DESIGNATION

ROME
COLLISION MANAGEMENT
SYSTEM

EST. 1989

2

VEHICLE DESIGNATION

Proper Repair Order 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.

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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".

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.
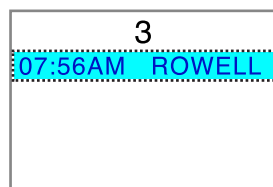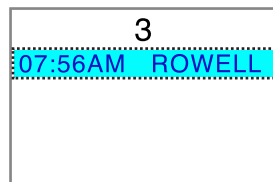

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AUTH/INS DESIGNATION

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.

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

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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.

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".

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.

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.

3
07:56AM   ROWELL
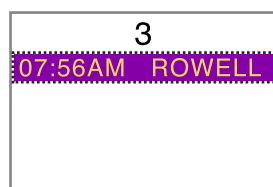
ROME

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.

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.
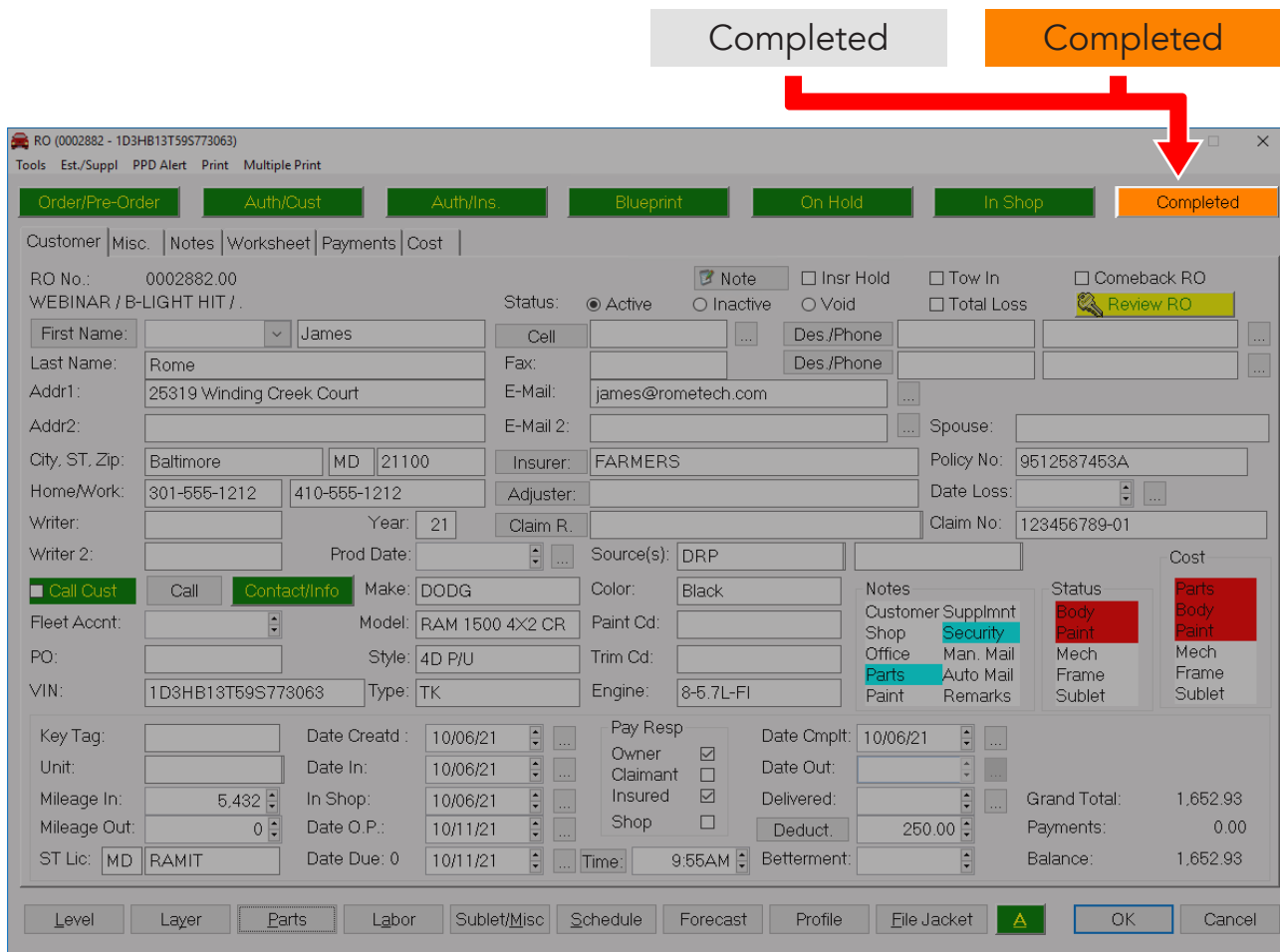
COMPLETED DESIGNATION

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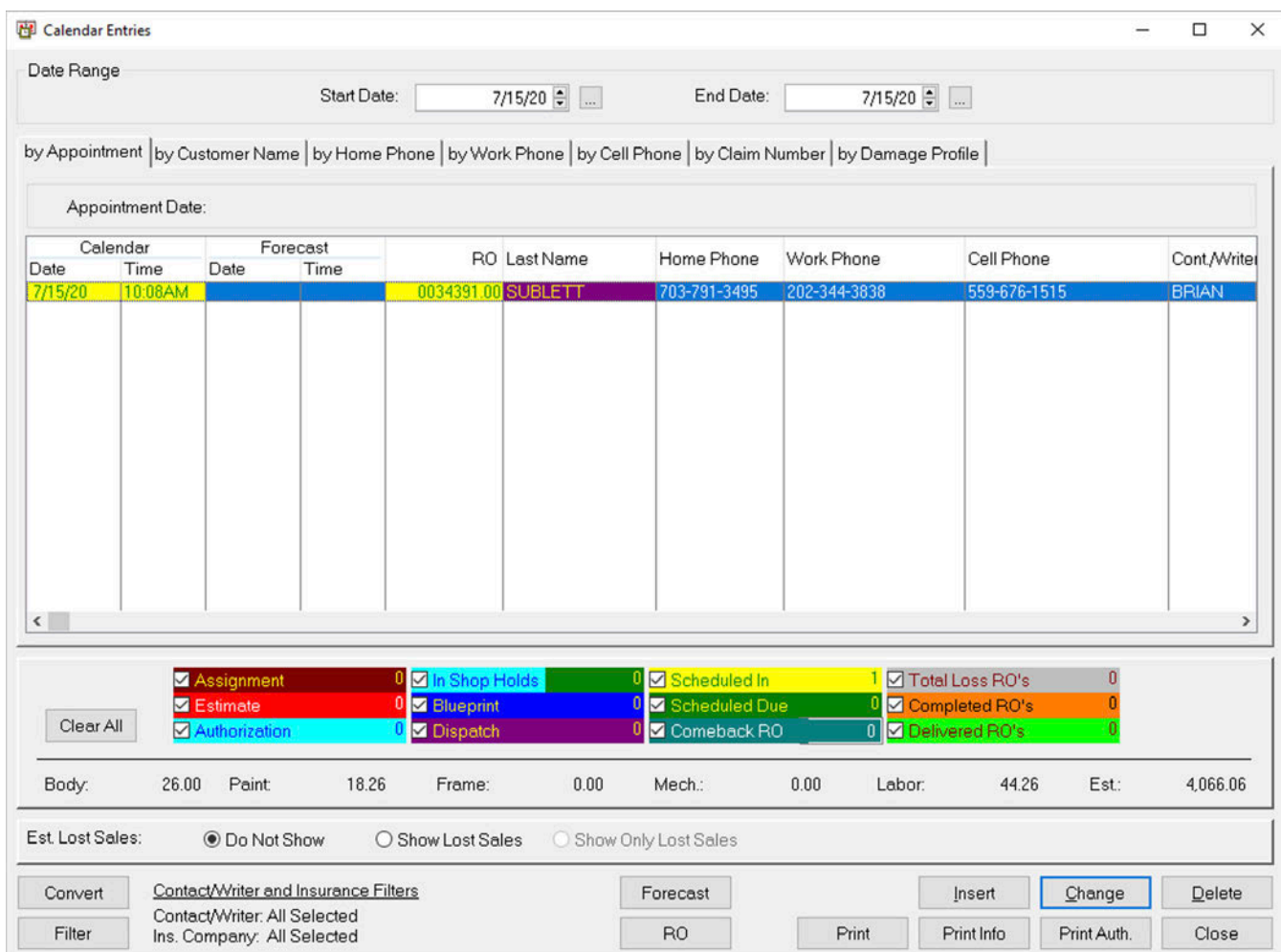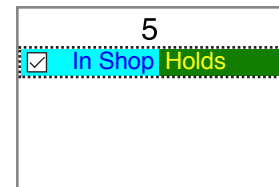
This RO will show on the calendar in "orange" on the RO date due.

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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.
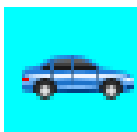
CALENDAR

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

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

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

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

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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.

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 incoice 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

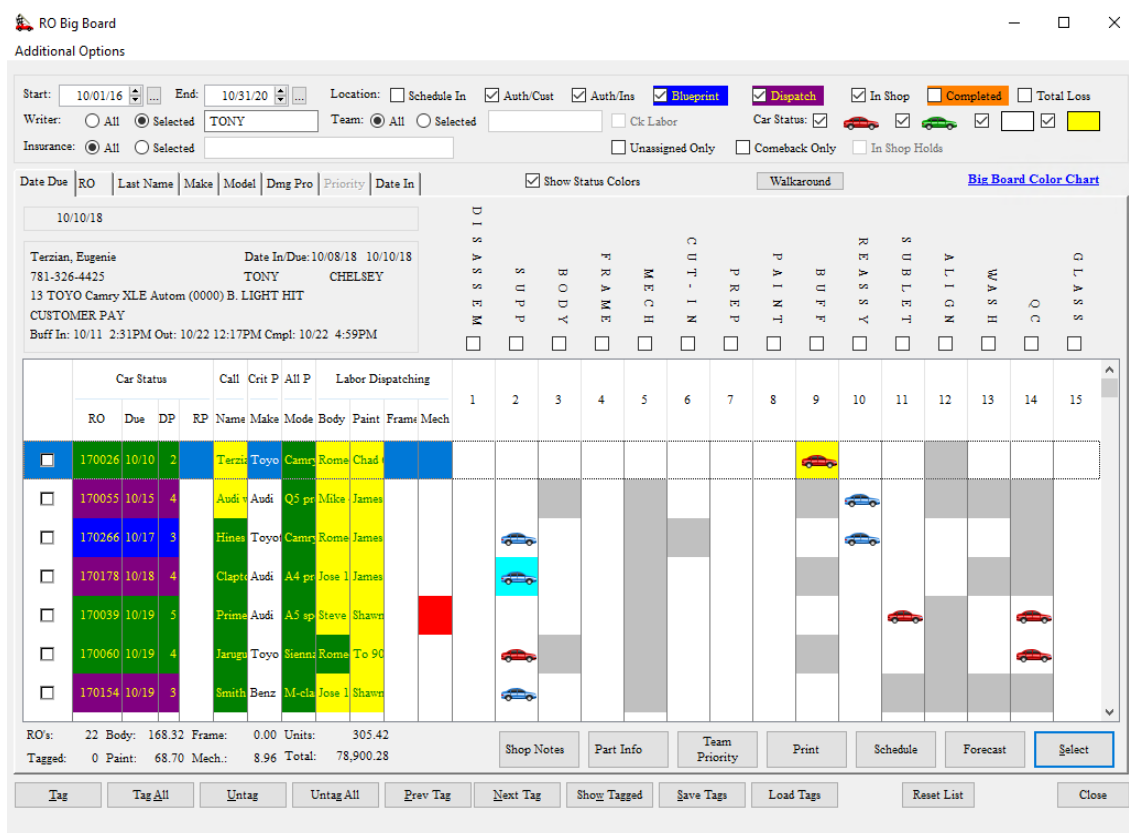**ACTION**
1. Create credit memo
2. Signature from vendor on credit meme for return
3. Scan signed credit meme into electronic file jacket

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.

ROME

ROME PRODUCTION DESIGNATIONS

	RO Schedule (Found in Repair Order)	Big Board Task	Stop Lights (Schedule)
	X	WHITE	🔴🟡🟢 (green)
	O	🚗 (green car)	🔴🟡🟢 (yellow)
	/	GREY	🔴🟡🟢 (red)

ROME

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 origional 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**

ROME

Car Status/ RO number

- **RO#** (blue) Blueprint
- **RO#** (purple) On Hold
- **RO#** (orange) Completed

Customer Service Calls/Name

- **NAME** (red-orange) Call for Due date update
- **NAME** (red) Call for due date & schedule
- **NAME** (yellow) Scheduled callback (Love call)
- **NAME** (green) Customer callback is current
- **NAME** (blue) Customer requested callback
- **NAME** (orange) Task status change callback

Car Status/ RO number

- ☐ No critical part on the job
- **MAKE** (red) No critical parts received
- **MAKE** (yellow) Some critical parts received
- **MAKE** (green) All critical parts received
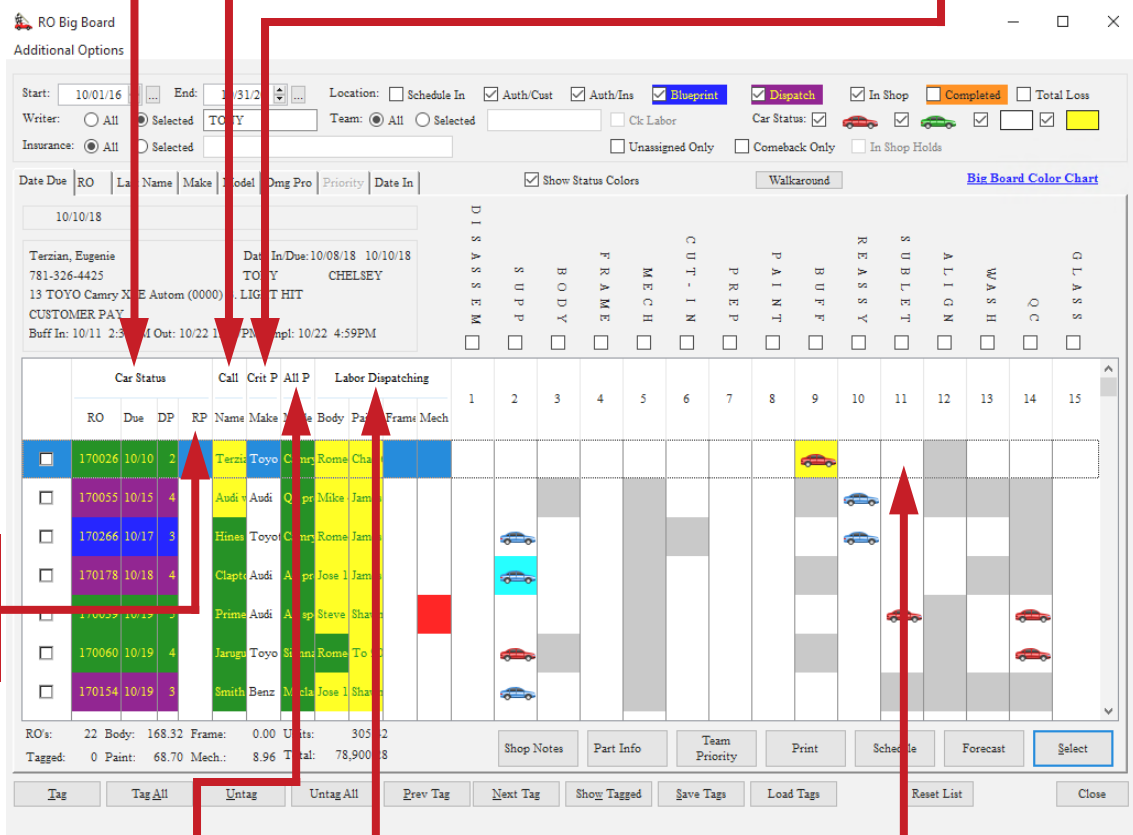
Technician Repair Priority

All parts List/Model

- ☐ No parts on the job
- **MODEL** (red) No parts received
- **MODEL** (yellow) Some parts reveived
- **MODEL** (green) All parts received

Labor Dispatching/Tech

- ☐ No labor on the job
- **TECH NAME** (red) No labor assigned to tech
- **TECH NAME** (yellow) Some labor assigned to tech
- **TECH NAME** (green) All labor assigned to tech

Task Status

- (blue car) Car in staging
- (green car) Car on schedule and in shop
- (red car) Car behind schedule in shop
- (yellow) 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.

☑ 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 byBig 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 numer 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

ROME

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

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

ROME

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

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10. Import EMS Customer
11. Select the Estimate System (CCC1, Mitchell, Audatex)
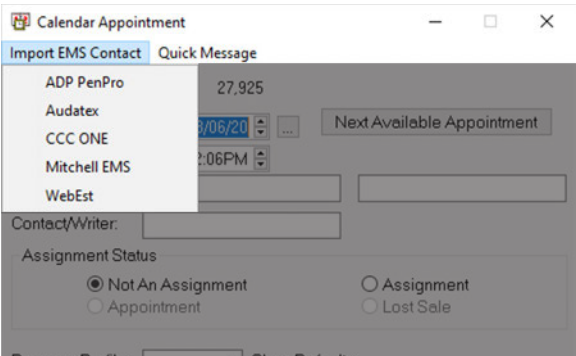
12. Find the Estimate by Customers Last name on the list (VIN is usually RED)
13. Copy the Vehicle Model
14. Click OK

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

ROME APPOINTMENT TO RO CONVERSION

1. Highlight the Appointment to convert
2. Click Convert

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

ROME

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

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

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

4. Click Convert

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

6. Click OK

7. Say Yes to the Comeback question

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

9. Update the fields in the RO

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UPDATE THE RO

1. **VEHICLE DESIGNATIONS – What is the car status?**
   a. Needing teardown? (Blueprint)
   b. Waiting on Parts? (On Hold)
   c. Tech working on the car? In paint? (In Shop)
   d. Car not here? (Scheduled in)

2. **MANDATORY FIELDS**
   a. Double Check all the mandatory blue fields are filled in

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

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

3. LAST CUSTOMER CONTACT ADDED

a. Press the "Call" Button – put the last note regarding the last contact you had with the customer.

b. Pick the next date you want to call the customer with an update.

4. BIG BOARD UPDATES

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

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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.

ROME

ROME