RO WORKFLOW CHEATSHEET
WITHOUT DIAGNOSTICS

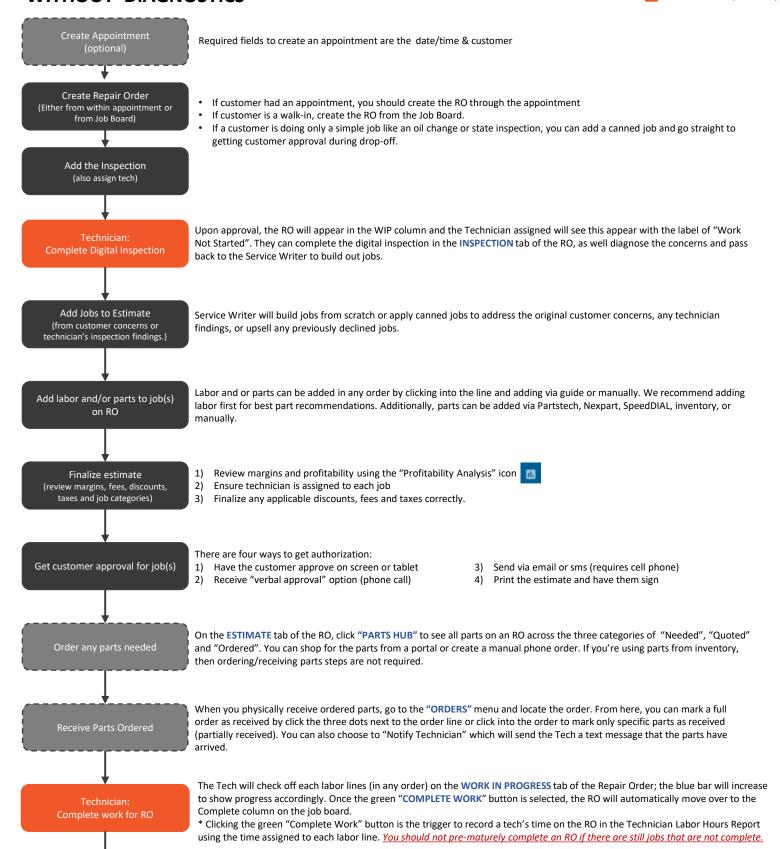**Create Appointment (optional)**

Required fields to create an appointment are the date/time & customer

Create Repair Order (Either from within appointment or from Job Board)

- If customer had an appointment, you should create the RO through the appointment
- If customer is a walk-in, create the RO from the Job Board.
- If a customer is doing only a simple job like an oil change or state inspection, you can add a canned job and go straight to getting customer approval during drop-off.

Add the Inspection (also assign tech)

Technician: Complete Digital Inspection

Upon approval, the RO will appear in the WIP column and the Technician assigned will see this appear with the label of "Work Not Started". They can complete the digital inspection in the **INSPECTION** tab of the RO, as well diagnose the concerns and pass back to the Service Writer to build out jobs.

Add Jobs to Estimate (from customer concerns or technician's inspection findings.)

Service Writer will build jobs from scratch or apply canned jobs to address the original customer concerns, any technician findings, or upsell any previously declined jobs.

Add labor and/or parts to job(s) on RO

Labor and or parts can be added in any order by clicking into the line and adding via guide or manually. We recommend adding labor first for best part recommendations. Additionally, parts can be added via Partstech, Nexpart, SpeedDIAL, inventory, or manually.

Finalize estimate (review margins, fees, discounts, taxes and job categories)

1) Review margins and profitability using the "Profitability Analysis" icon ▣
2) Ensure technician is assigned to each job
3) Finalize any applicable discounts, fees and taxes correctly.

Get customer approval for job(s)

There are four ways to get authorization:
1) Have the customer approve on screen or tablet
2) Receive "verbal approval" option (phone call)
3) Send via email or sms (requires cell phone)
4) Print the estimate and have them sign

Order any parts needed

On the **ESTIMATE** tab of the RO, click **"PARTS HUB"** to see all parts on an RO across the three categories of "Needed", "Quoted" and "Ordered". You can shop for the parts from a portal or create a manual phone order. If you're using parts from inventory, then ordering/receiving parts steps are not required.

Receive Parts Ordered

When you physically receive ordered parts, go to the **"ORDERS"** menu and locate the order. From here, you can mark a full order as received by click the three dots next to the order line or click into the order to mark only specific parts as received (partially received). You can also choose to "Notify Technician" which will send the Tech a text message that the parts have arrived.

Technician: Complete work for RO

The Tech will check off each labor lines (in any order) on the **WORK IN PROGRESS** tab of the Repair Order; the blue bar will increase to show progress accordingly. Once the green **"COMPLETE WORK"** button is selected, the RO will automatically move over to the Complete column on the job board.
* Clicking the green "Complete Work" button is the trigger to record a tech's time on the RO in the Technician Labor Hours Report using the time assigned to each labor line. *You should not pre-maturely complete an RO if there are still jobs that are not complete.*

Pay & Post

In the **PAYMENT** tab within RO is where you take payment, void transactions and issue refunds.
- You can either "Pay & Post" an RO in one click or choose to just take payment and post afterwards.
- The Payment report is real-time, meaning payments taken at any time will be in the Payments Report.
- You must Post an RO for it to appear in the End of Day, Sales and Profit reports.
- You can choose your payment and posting dates for any past date.