Getting the Most Out of the CR Auto Scheduler® Program

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Preparation to Install and Use the CR Auto Scheduler® Program

Congratulations on your decision to use the CR Auto Scheduler® program! We are eager to hear of the ways that this program has benefited your business as you progress. Before you can share those stories with us however, we need to get the CR Auto Scheduler® program installed and operating within your facility.

As you install and setup the program, you will be asked to make decisions and to provide certain information. To shorten the installation and implementation processes, it would be beneficial for you to consider these items and to gather this information prior to beginning the process. The complete installation and setup process is described on pages 5 – 10 of this manual. Please take a few moments to read through these pages now.

{Note: With the exception of the **Product Selection** paragraph on page 6, CR Auto Scheduler® refers throughout this agreement to the two versions of CR Auto Scheduler®: CR Auto Scheduler® Plus and CR Auto Scheduler® ME.}

Installation Process

✓ **Overview** The major steps in the Installation Process are:

Install Program to Server ⇨

Establish Initial Workstation ⇨

Run Facility Wizard ⇨

Create Users ⇨

Set-up CRASWatch™ ⇨

Run CRASWatch™ ⇨

Establish Additional Workstations ⇨

Create Payment Sources ⇨

Enter Existing Schedule.

Each of these steps is discussed briefly below.

✓ **Install Program to Server** The installation process begins when you place the CR Auto Scheduler® CD into the CD drive on one of your workstations. The CD will auto-play and provide you several options. To install the program, select **Install CR Auto Scheduler®**.

If the program does not auto-play or if the **Install CR Auto Scheduler®** does not activate on your system, you may still install the program. To do so, run **setup.exe** from the CR Auto Scheduler® CD.

During the installation process, the program will be assessing whether your system has all of the necessary files to run the program. If it does not find the appropriate files, it will copy them onto your system and may ask you to re-boot. This may happen several times during the installation process.

The installation wizard will walk you through the installation process. During this process, you will be asked to choose the Installation Folder. If you are planning on using the CR Auto Scheduler® program on a network, then please choose to install to a folder on the server. After selecting this location, jot down the location. You will need this information when setting up individual workstations to use with the program. If you will be using CR Auto Scheduler® ME, the version of the program designed for load-leveling across multiple facilities, you will need to store the database on a network drive that can be accessed by each facility.

You will also be asked whether you wish to install the CRASWatch™ program. This program was designed by Collision Resources to minimize the double-entry of estimate information. The CRASWatch™ program utilizes EMS files generated by the computerized estimating systems to populate the CR Auto Scheduler® program with customer, vehicle and repair information. The CRASWatch™ program is made available to users of the CR Auto Scheduler® program at no additional charge over the licensing fee paid to use CR Auto Scheduler®. Please confirm that you want to install this program as well. When asked where to install this program, accept the default located suggested which will be on the C: drive. This program should not be installed on the server.

When the programs have been installed, you will see a confirmation message on your screen.

- ✓ **Establish Initial Workstation** After installing the program, you will need to setup the workstation being used to install the program so that the workstation can be used to access the program. With the CR Auto Scheduler® CD still in the CD drive, go to your desktop. Double-Click on the CR Auto Scheduler® icon. When the program opens, select **First Time Installation**. Follow the instructions on each screen as it walks you through the setup of the workstation. Make certain that you enter the correct location for the database location.

  During this process, you will be asked for your **Product Selection** and **Database Location** among other things. For more information on these topics, see below.

  - **Product Selection** You must decide whether to install the CR Auto Scheduler® Plus or CR Auto Scheduler® ME program. CR Auto Scheduler® Plus is designed for collision repair organizations that have a single production facility. CR Auto Scheduler® ME provides the CR Auto Scheduler® Plus functionality for organizations with multiple facilities. In addition, it allows these organizations to load-level their workflow across the multiple facilities.
  - **Database Location** You must indicate where the CR Auto Scheduler® database will be stored. When you installed the program, you selected a folder in which to install. Please select that same folder for the database location.

- ✓ **Run Facility Wizard** The facility wizard is run automatically during the set-up process. Through the wizard, you provide the information necessary for CR Auto Scheduler® to develop a schedule specific to your collision repair center. The wizard contains descriptive text to assist you with making the appropriate selections or entering the appropriate data.

  Additional information about the Facility Wizard can be found below in **Administrative Options ⇨ Facility Wizard**.

- ✓ **Create Users** You need to decide who will have access to the CR Auto Scheduler® program for scheduling, updating, or managerial purposes. You will also need to decide whether to grant these individuals Administrative or Limited access to the program. Employees with Limited access can schedule repairs, update information on ROs, and print reports. However, they do not have access to the Facility Wizard and thus cannot modify the assumptions underlying the schedule created for the collision repair facility. Individuals with Administrative access can access all functions of the program, including the Facility Wizard.

The set-up process will prompt you to enter at least one individual with Administrative access during the installation process. However, you will need to eventually enter every individual that needs access to the program. You can enter the production employees as well. If you do, the production employees that participated on each repair could then be documented within the program.

If you choose to enter only the one Administrative user during the set-up process, you may enter the remaining employees later using the Staff setup. The process of adding staff within the program is described below in **Administrative Options ⇨ Staff**.

When adding staff during the installation process, please pay particular attention to the following fields:

- **Staff Type** The individual responsible for closing the sale in most collision repair facilities is the estimator. Regardless of the title of that person within your facility, please select **Estimator** in this field for their staff type.
- **Status** All current employees would be set as **Active** in this field. If an employee no longer is employed by this facility, their status should be changed to **Inactive**.
- **CR Auto Scheduler® User** You will need to check this box for each employee that you wish to use CR Auto Scheduler®.
- **User Name, Password, and Security Role** Once you designate an employee as a CR Auto Scheduler® user, you will need to assign a user name, password and security role. The password must be at least 5 characters in length. The security roles available are Limited and Administrative. Employees with Limited access can schedule repairs, update information on ROs, and print reports. They do not have access to the Options, including the Facility Wizard, and thus cannot modify the assumptions underlying the schedule created for the collision repair facility. Individuals with Administrative access can access all functions of the program, including the Facility Wizard.

  Only an administrator can set the user name and password. Individuals with Limited access will not be able to change their user name or password from what is set for them. If a user forgets her password, an Administrator can reset the password through the Staff setup.

  When you have entered at least one staff member, choose Cancel to exit this area. The set-up process will ask you to exit the CR Auto Scheduler® program and re-enter using the name and password of a staff member that you have just entered. To exit the program, select the Exit button. To re-enter it, double-click on the CR Auto Scheduler® icon on the desktop.

- **Set-up CRASWatch™** To set-up the CRASWatch™ program, launch the CRASWatch™ program by double-clicking on the related short-cut that was placed on the Desktop of the workstation used during the installation process.

  In setting up CRASWatch™, you will be required to know the locations of the **CRASWatch™ database**, the **CR Auto Scheduler® database**, and the **EMS files** generated by each computerized estimating system in use. For more information on these topics, see below.

  - **CRASWatch™ database** You will be asked to verify where this database is stored. If you choose the default locations when installing the CRASWatch™ program, then the default location showing in CRASWatch™ should be correct. If the program does not show the proper location for this database, browse until the proper location is displayed.
  - **CR Auto Scheduler® database** You must also verify where this database is stored. If the program does not show the proper location, browse until the proper location is displayed. Unlike the CRASWatch™ database, this database is most likely stored on a server drive. It would be the location selected above when setting up the CR Auto Scheduler® program.
  - **EMS files** EMS files are the files created by the computerized estimating systems to allow data to be passed from those systems to other programs. Each computerized estimating system writes EMS files to a unique directory. You will need to identify these directories before completing the set-up of CRASWatch™. If you cannot determine where the EMS files are located, please contact CR Auto Scheduler® support at 877-COLLISION.

  Once the locations of the CRASWatch™ and CR Auto Scheduler® databases have been entered, select **Folders to Watch** and enter the following information.

  - Enter the location of the EMS files for one of the computerized estimating systems in use.
  - Select the facility to which these EMS files pertain (Note: only when CR Auto Scheduler ME® is being used will there be more than one location from which to choose.)
  - Select which computerized estimating system is generating these EMS files
  - Select a default estimator. While the CRASWatch™ program attempts to identify the estimator from the EMS files, it is not always possible to do so. When it is not clear who the estimator is, the program will default to the estimator listed here. It is recommended that the estimator that creates the most

estimates from this computerized estimating system be listed as the default estimator.

Once these fields have been entered, select **Save** and then **Cancel** to exit this screen.

If more than one computerized estimating system is used, inform the CRASWatch™ program of this by again selecting **Folders to Watch**. Then select **Add New** and enter the appropriate information for the additional computerized estimating system. Repeat these steps until the program has been informed of each computerized estimating systems is use.

- ✓ **Run CRASWatch™** The CRASWatch™ program is designed to be run continuously in the background of the workstation. In order to start the program, double-click on the shortcut to the program on the desktop. Select **Start Monitoring**. You may now minimize the CRASWatch™ window and allow the program to continue to run in the background. The program will periodically check the EMS folders for new information to bring into the CR Auto Scheduler® program. When new information is present, it will automatically be pulled into the CR Auto Scheduler® program and display it in the Unscheduled Estimates list. Note: The CRASWatch™ program must be running for the information from new EMS files to be pulled into the CR Auto Scheduler® program.

- ✓ **Establish Additional Workstations** You will also need to take the CR Auto Scheduler® CD to each of the other workstations that you wish to use with the program. Place the CD into the CD drive on these workstations and install the program from these workstations just as you did on the very first workstation as described in **Install Program to Server** above. Be certain to use the same database location that was selected earlier. Don't worry about overwriting the database that has already been created. The install program will not replace files that are already present. (Note: If the setup.exe file is saved on the server, then that program can be run from each workstation that will be used to access the CR Auto Scheduler® program. This will eliminate the need to take the CD to each individual workstation.)

  Once the install program has been run from the new workstation, go to the desktop and select the CR Auto Scheduler® icon. When the program opens, select **Additional Workstation**. Again, follow the instructions on each screen as you walk through the setup of the workstation. Again, you must be certain to use the same database location that was selected earlier when setting up individual workstations.

  Continue this process until each workstation that needs to access the CR Auto Scheduler® program has been setup to use the program.

- **Create Payment Sources** The CR Auto Scheduler® program allows cycle time and supplement information to be organized by payment source. However, to use this information in scheduling, the individual payment sources need to be created within the program.

  Distinct payment sources should be created for each insurance company, fleet, or dealership that pays the facility for collision repairs. Customer Pay would be another payment source. Many shops have found it valuable to distinguish the payment sources even further. For instance, one payment source may be established for Service First and another for State Farm. The creation of payment sources is done through the Payment Sources setup.

  The installation process does not automatically engage the Payment Sources setup. To run the Payment Sources setup: Select **Options ⇨ Payment Sources**

  Within Payment Sources setup, please pay particular attention to the following field:

  - **Auto Update or User Specified or No Supplement** If you would like for the program to continually update the cycle times and supplements for individual payment sources based upon the most recent data available, select **Auto Update** for both cycle times and supplements. In this case, when a new job is scheduled, the most recent supplement history on jobs with the same payment source would be used to adjust the hours on the job. The most recent cycle time history on these jobs would be used to determine the expected delivery date.

    If you would like to set specific cycle times and/or supplement sizes for a payment source, select **User Specified**. In this case, you will need to enter the cycle times and supplement figures that you would like to use during the scheduling process.

    You will need to enter cycle times, as measured by total hours produced per RO per production day, for the entire facility and for each job size. You will also need to enter similar information for the number of metal hours produced per RO per production day and the refinish hours produced per RO per production day.

    You will also need to enter supplement factors, as measured by the average percentage increase in sales attributable to supplements, by size of job and by scheduling method (i.e., total, metal, and refinish hours).

    If the facility has a relationship with a payment source that prohibits supplements, you could select **No Supplement**. In this case, the hours on the estimate will not be adjusted to reflect any expected supplemental work.

- **Enter Current Schedule** In order to schedule effectively, the program needs to know what work is in process and what work is already scheduled to be repaired in the future. This information can be entered into the program by selecting **Enter R.O.** *{Note: In* *order to enter the current schedule, you need to be logged in with Administrative clearance. If you are logged in as an employee with only Limited access, you will be unable to perform all of the necessary steps to enter your existing schedule. Once the initial schedule has been added, however, employees with Limited access will have access to all of the necessary items to schedule effectively.}*

For each vehicle in process and each vehicle scheduled to be repaired, you will need to gather and enter the following information on the first screen in **Enter R.O.**:

- **Estimator Name**
- **Customer Name**
- **Metal Hours** Enter the total metal, frame, and mechanical hours from the estimate
- **Refinish Hours** Enter the total paint, prep, and buff hours from the estimate
- **Sales $ on Estimate** Enter the total sales from the estimate
- **Optional Information** The remaining fields on this screen are optional and do not need to be filled in. However, the program will 'learn' sooner if you complete the **Payment Source** field.

When this first screen is complete, select **Next**.

The next screen that appears shows the options for scheduling the vehicle. However, since you are entering in the work-in-process and other repairs that have already been scheduled, you will not want to select one of the options provided. Instead, click on the square next to **Override**.

- **Drop-Off Date** Enter the Drop-Off Date using the date format of mm/dd/yy (i.e., December 27, 2002 would be entered as 12/27/02). The **Drop-Off Date** on work-in-process should be the date that the vehicle arrived at the facility. For scheduled work, this date should be the date that the vehicle is scheduled to arrive at the facility.
- **Delivery Date** Enter the **Delivery Date** again using the date format of mm/dd/yy. The **Delivery Date** for both work-in-process and scheduled work should be the date that the repaired vehicle is expected to be returned to the customer.

When this second screen is complete, select **Next**.

The third screen shows a confirmation that the vehicle is scheduled. When this screen appears, select **Next**.

Repeat these steps until all vehicles in process and all vehicles already scheduled to be repaired have been entered.

A final step in this process requires informing the CR Auto Scheduler® program that the existing schedule has been entered.

To do this, Select **Options ⇨ Facility Setup**

Select **Edit** and then check the box next to **All Work In Process has been entered**. Select **Save**.

The installation process and initial setups of both the CR Auto Scheduler® and CRASWatch™ programs are now complete and they are ready to use.

Scheduling a Repair

- ✓ **Overview** Scheduling a repair with the CR Auto Scheduler® program is very easy. In general, there are only three steps required:

  Locate Customer and Repair Information ⇨

  Verify and Complete Customer and Repair Information ⇨

  Select Appropriate Scheduling Option.

  These steps are described below.

  If a repair that does not appear in the Unscheduled Estimates list must be scheduled, the process requires only two steps:

  Enter Customer and Repair Information ⇨

  Select Appropriate Scheduling Option.

  These steps are also described below.

- ✓ **Locate Customer and Repair Information** If the CRASWatch™ program is in use, then most estimates waiting to be scheduled will be listed in the Unscheduled Estimates list. Therefore, the scheduling process begins by selecting **Unscheduled Estimates.**

  Find the desired repair to schedule in the Unscheduled Estimates list. To make it easier to find the desired repair, you may sort the list by any of the column headings by clicking on the column header. Once the desired repair is found, click on the box to the left of the customer's name shown for that repair.

  It is also important to note that the original estimator does not need to be the individual that schedules the open estimate. If a receptionist, customer service rep or another estimator talks with a customer who wishes to schedule, they can just as easily find the appropriate customer in the **Unscheduled Estimates** list.

- ✓ **Verify and Complete Customer and Repair Information** The screen now displays a variety of information specific to the repair being scheduled. Review this information to verify that it is accurate. If it is not, update the information. There is one field that requires particular attention: **Payment Source**.

  - **Payment Source** The program will be able to consider the payment source when scheduling only if the **Payment Source** is entered. When a payment sources is specified for the repair, the CR Auto Scheduler® program offers scheduling options after considering the supplement and cycle time histories of the listed payment source. Since this field is not automatically filled in by the CRASWatch™ program, the user must select the payment source to obtain the most appropriate scheduling options.

When this screen is complete, select **Next**.

- **Select Appropriate Scheduling Option** The next screen that appears shows the options for scheduling the vehicle. These options are described below.
  - **Scheduled Dates In and Dates Out** The program will return 3 options of dates that are acceptable for bringing work into the facility and returning the repaired vehicle to the customer. These options, if selected, ensure that the facility's schedule remains balanced. If one of these options is acceptable to the customer, then click on the square next to the desired option and select **Next**.
  - **Override** If the three dates offered are not acceptable to the customer, the estimator can override the scheduling system and enter any date on which to have the vehicle dropped off for repairs. To do this, click on the square next to **Override**.

    Enter the Drop-Off Date using the date format of mm/dd/yy (i.e., December 27, 2005 would be entered as 12/27/05). The Drop-Off Date should be the date that the vehicle is scheduled to arrive at the facility for repairs to begin.

    After entering this date, select the **Tab** key on the keyboard. This will result in the remaining fields in **Override** being populated. If this option is acceptable, then select **Next**.

    Note: Since **Override** bypasses the scheduling controls, it should be used only infrequently and for special customer circumstances.
  - **No Schedule** If the customer is unwilling or unable to schedule the repair while on-site, then the estimator can save the data about the customer and the repair as an unscheduled job. To do this, click on the square next to **No Schedule**. Then select **Next**. The estimator will be prompted to enter the reason why the customer is unable to schedule the repair. Enter the reason and select **OK**. This action will send the repair back to the Unscheduled Estimates list.

  After one of these three options is chosen, the program will display a confirmation of the option selected. When this screen appears, the user has the option of printing a reminder to give to the customer. To print this reminder, select **Print to Printer**. Finally, select **Next** to exit this screen. The CR Auto Scheduler® program is now ready to schedule the next repair.

- **Enter Customer and Repair Information** When an estimate is not generated through a computerized estimating system at the collision repair center, the information on that estimate is not available to the CRASWatch™ program. Thus, the data does not flow automatically into the CR Auto Scheduler® program. In this instance, the scheduling of the repair would begin by selecting **Enter R.O.**

Enter the following information on the first screen in **Enter R.O.**:

- **Estimator Name** This field will self-populate if the estimator is logged onto the workstation on which she is entering the information.
- **Customer Name**
- **Metal Hours** Enter the total metal, frame, and mechanical hours from the estimate
- **Refinish Hours** Enter the total paint, prep, and buff hours from the estimate
- **Sales $ on Estimate** Enter the total sales from the estimate
- **Optional Information** The remaining fields on this screen are optional and do not need to be filled in. However, the program will be able to consider the payment source when scheduling only if the **Payment Source** field is completed.

When this first screen is complete, select **Next**.

✓ **Select Appropriate Scheduling Option** As described above, select the appropriate scheduling option.

✓ **Scheduling Best Practices** In order to maximize the value received from using the CR Auto Scheduler® program, we recommend entering all sales opportunities into the program for scheduling. This would include customers who visit the shop for estimates, assignments received from insurance companies, dealer or fleet vehicles that arrive at our facility, tow-ins, etc. Regardless of whether you 'know' that you are going to get this job or you 'know' that you are not going to get this job, we still recommend passing all of the possible jobs through the program. Furthermore, we recommend using the CR Auto Scheduler® program immediately following the estimate generation and <u>before</u> the estimator meets with the customer to review the repair estimate.

There are several important reasons for our position:

- **Consistency** One of the major drawbacks of utilizing a paper-based scheduling system is that implementation is frequently inconsistent. If some estimators are following the designated scheduling process while others are not, the results may be no better than having no scheduling process at all. By entering every sales opportunity through the program, you ensure that everyone is following the same process to schedule work through the facility.
- **Mindset** Frequently estimators are distracted from their primary purpose..selling repair work for the facility. By using the CR Auto Scheduler® program immediately before reviewing the estimate with a customer, the estimator is reminded that his job is to sell the repair order to the customer.

- **Professionalism** During the estimate review process with the customer, the estimator can not only ask for the sale but can confidently talk about when repairs could begin on the vehicle and when the repairs would be completed.
- **Sales** When all sales opportunities are entered into the CR Auto Scheduler® program, there are bound to be some that the estimator is unable to close immediately. With those jobs already entered into the program, the estimator can instantly pull up a list of their current open estimates by selecting **Unscheduled Estimates**. This list could be used to routinely follow-up on the open estimates to capture a greater number of those jobs. In addition, once a customer decides to schedule one of these open estimates, the estimator could provide the customer with scheduling options immediately.
- **Closing Ratio** With all sales opportunities entered, the program can generate reports that track the closing ratio by estimator and by facility. By measuring these items, a manager could focus the estimators' attention on improving their sales efforts.

Administrator Options

- **Overview** Users with Administrative access can use the **Options** available within CR Auto Scheduler®. The available **Options** are:
  - **Capacity Adjustments**;
  - **Payment Sources**;
  - **Company Options**;
  - **Facility**;
  - **Staff;**
  - **Vehicle Makes; and**
  - **Facility Wizard**.

  These **Options** are discussed below:

- **Capacity Adjustments** The capacity of the facility can be modified for specific dates using **Capacity Adjustments**. This option would most often be used to modify capacity when it is known in advance that production employees will not be available for work (e.g., vacations, planned medical procedures, training, etc.).

  To adjust the capacity, select **Options** ⇨ **Capacity Adjustments**.

  Once within **Capacity Adjustments**, select the dates on which you would like to reduce capacity. In the **Drop Off Decrease %** field, enter the percentage by which you would like to reduce the hours available to be dropped off (e.g., entering 10% in this field for a facility that strives to drop off 100 hours per day would result in only 90 hours being dropped off on that day.). In the **Delivery Decrease %** field, enter the percentage by which you would like to reduce to number of vehicles to deliver each day (e.g., entering 25% in this field for a facility that delivers 4 vehicles a day will drop the number of delivery slots to 3 on the days selected.).

  Note: The capacity adjustments are not cumulative. That is, if a date has already had the drop off capacity reduced by 10% and you wish to drop it another 10%, you would enter this as a 20% reduction for that date. The previous adjustment is replaced by the most recent adjustment.

  If you wish to undo a capacity adjustment for a particular date, select that date and enter 0% as the % decrease for drop off or delivery, whichever is appropriate. This will return the capacity to the full level as if no capacity adjustment had ever been made.

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- **Payment Sources** The CR Auto Scheduler® program allows cycle time and supplement information to be organized by payment source. However, to use this information in scheduling, the individual payment sources need to be created within the program.

  {Note: Creation of these payment sources in the basic version of the program will enable the payment source to show on reports, but it will not allow for cycle times and supplement information to be organized by payment source. The remainder of this section describes the steps to take when using either the CR Auto Scheduler® Plus or CR Auto Scheduler® ME program.}

  Distinct payment sources should be created for each insurance company, fleet, or dealership that pays the facility for collision repairs. Customer Pay would be another payment source. Many shops have found it valuable to distinguish the payment sources even further. For instance, one payment source may be established for Service First and another for State Farm. The creation of payment sources is done through the Payment Sources setup.

  To utilize Payment Sources: Select **Options ⇨ Payment Sources**

  Within Payment Sources setup, please pay particular attention to the following fields:

  - **Source No Longer in Use** If you cease to do work for any existing payment source, please select this box. This will make the reports 'cleaner'.
  - **Auto Update or User Specified or No Supplement** If you would like for the program to continually update the cycle times and supplements for individual payment sources based upon the most recent data available, select **Auto Update** for both cycle times and supplements. In this case, when a new job is scheduled, the most recent supplement history on jobs with the same payment source would be used to adjust the hours on the job. The most recent cycle time history on these jobs would be used to determine the expected delivery date.

    If you would like to set specific cycle times and/or supplement sizes for a payment source, select **User Specified**. In this case, you will need to enter the cycle times and supplement figures that you would like to use during the scheduling process.

    You will need to enter cycle times, as measured by total hours produced per RO per production day, for the entire facility and for each job size. You will also need to enter similar information for the number of metal hours produced per RO per production day and the refinish hours produced per RO per production day.

    You will also need to enter supplement factors, as measured by the average percentage increase in sales attributable to supplements, by size of job and by scheduling method (i.e., total, metal, and refinish hours).

If the facility has a relationship with a payment source that prohibits supplements, you could select **No Supplement**. In this case, the hours on the estimate will not be adjusted to reflect any expected supplemental work.

- **Company Options** Through **Company Options**, users may enter information specific to the company such as address and contact information. In addition, this is where holidays or other non-production days would be entered.

  To use **Company Options**: Select **Options ⇨ Company Options**

- **Facility** This option allows the user to check on the current settings of several variables. The user can verify whether the schedule is established based on total, metal or refinish hours. They can also check the maximum number of small, medium, large and heavy hit slots that have been created for each day through the **Facility Wizard**. Finally, they can review the number of delivery slots by day of the week.

  To view these settings, select **Options ⇨ Facility**

- **Staff** You need to decide who will have access to the CR Auto Scheduler® program for scheduling, updating, or managerial purposes. You will also need to decide whether to grant these individuals Administrative or Limited access to the program. Employees with Limited access can schedule repairs, update information on ROs, and print reports. However, they do not have access to the Facility Wizard and thus cannot modify the assumptions underlying the schedule created for the collision repair facility. Individuals with Administrative access can access all functions of the program, including the Facility Wizard.

  The program will prompt you to enter at least one individual with Administrative access during the set-up process. However, you will need to eventually enter every individual that needs access to the program. You can enter the production employees as well. If you do, the production employees that participated on each repair could then be documented within the program.

  In order to add or edit staff, select **Options ⇨ Staff**.

  When adding or editing staff, please pay particular attention to the following fields:

  - **Staff Type** The individual responsible for closing the sale in most collision repair facilities is the estimator. Regardless of the title of that person within your facility, please select **Estimator** in this field for their staff type.
  - **Status** All current employees would be set as **Active** in this field. If an employee no longer is employed by this facility, their status should be changed to **Inactive**.

- **CR Auto Scheduler® User** You will need to check this box for each employee that you wish to use the CR Auto Scheduler® program.
- **User Name, Password, and Security Role** Once you designate an employee as a CR Auto Scheduler® user, you will need to assign a user name, password and security role. The password must be at least 5 characters in length. The security roles available are Limited and Administrative. Employees with Limited access can schedule repairs, update information on ROs, and print reports. They do not have access to the Options, including the Facility Wizard, and thus cannot modify the assumptions underlying the schedule created for the collision repair facility. Individuals with Administrative access can access all functions of the program, including the Facility Wizard.

  Only an administrator can set the user name and password. Individuals with Limited access will not be able to change their user name or password from what is set for them. If a user forgets her password, an Administrator can reset the password through the Staff setup.

✓ **Vehicle Makes** Through **Vehicle Makes**, you are able to increase the standard lead time for repairs by make of vehicle.

For instance, if it normally takes 3 days to receive parts to repair a Volvo, a collision center may not want to schedule repairs to begin on a Volvo in need of parts for at least 3 days. In this table, if a 3 is entered next to Volvo and if a Volvo repair is being scheduled, then this 3 will also appear in the Lead Time Adjustment field on the screen where customer and repair information is verified during the scheduling process. CR Auto Scheduler® will now not consider tomorrow (the default option) as the first option for scheduling in this repair. Instead, it will consider 3 days from tomorrow as the first option to schedule in the repair. This adjustment would provide the necessary lead time to enable the collision center to have the required parts on hand for the repairs to progress. By entering the minimum lead time desired by make under this option, the appropriate lead time adjustment is automatically applied every time a vehicle is scheduled.

It is important to note that the person scheduling the repair may override the lead time adjustment when verifying the data during scheduling. For instance, if no parts are needed to repair the Volvo referred to above, then there is no need to wait 3 additional days before beginning repairs. The individual scheduling the repair can enter 0 in the Lead Time Adjustment field during scheduling and the program will again use the default of tomorrow as the first opportunity to consider for scheduling.

To use **Vehicle Makes**: Select **Options ⇨ Vehicle Makes**

- **Facility Wizard** Through the **Facility Wizard**, you provide the information necessary for the CR Auto Scheduler® program to develop a schedule specific to your collision repair center. The wizard contains descriptive text to assist you with making the appropriate selection or entering the appropriate data.

  The **Facility Wizard** is run automatically during the installation process. Thereafter, the **Facility Wizard** should be run whenever:

  - the capacity of this facility changes;
  - the mix of work to the facility changes significantly; or
  - the schedule becomes unbalanced (i.e., small jobs can be scheduled in within a few days while large jobs are routinely scheduled 3 weeks out.).

  To run the **Facility Wizard**: Select **Options ⇨ Facility Wizard**

  Once the appropriate changes have been made to the **Facility Wizard** and those changes have been saved, the CR Auto Scheduler® program will begin scheduling work based upon the new settings. The program will not, however, modify the scheduled drop off or delivery dates of any vehicles that were previously scheduled.

Updating R.O.s

- **Overview** Through **Updating R.O.s,** a user can make adjustments to or update jobs that have already been scheduled. Among the items that can be accomplished here are:
  - Re-scheduling a job;
  - Withdrawing a vehicle;
  - Totaling a vehicle;
  - Revising the expected delivery date;
  - Identifying a job as a tow-in;
  - Enter information about the actual time of repairs and final sales.

- **Re-scheduling a job** In order to reschedule a job, first highlight the job in the list of repairs shown under **Updating R.O.s**. Right click the mouse button and select **Re Schedule RO**. The **Enter R.O.** will appear with the customer and repair information on the job already filled in. Schedule the job just as if you were scheduling it the first time.

  This process will free up the hours and the slots consumed by the job when originally scheduled and will consume the hours and slots on the dates as selected for the re-scheduled job.

- **Withdrawing a vehicle** Should a vehicle be withdrawn from the facility prior to the completion of repairs, the schedule can be updated after highlighting the job in the list of repairs shown under **Updating R.O.s**. Right click the mouse button and select **Withdrawn Vehicle**. This process will free up the hours and the slots consumed by the job when originally scheduled. These hours and slots would be available for newly scheduled repairs.

- **Totaling a vehicle** Should a vehicle be totaled, the schedule can be updated after highlighting the job in the list of repairs shown under **Updating R.O.s**. Right click the mouse button and select **Totaled Vehicle**. This process will free up the hours and the slots consumed by the job when originally scheduled. These hours and slots would be available for newly scheduled repairs.

- **Revising the expected delivery date** If a vehicle is expected to be delivered on a date other than the scheduled delivery date, enter the expected delivery date through **Updating R.O.s**. Highlight the job and choose **Select**. Choose **Edit**. Select the **R.O. Info** tab. Enter the expected delivery date into the **Revised Estimated Date Out** field.

This process will free up a delivery slot on the scheduled delivery date and consume a delivery slot on the revised delivery date.

- **Identifying a job as a tow-in** When a vehicle is towed in to a facility, it may sit for a period of time before it is worked into production. This idle time is not generally the fault of the collision repair center. It merely represents the fact that just because a vehicle is dropped off does not mean that the facility has capacity available to perform the repairs.

  When gathering cycle time experience for use in scheduling in the CR Auto Scheduler® program, it is necessary to exclude this idle time from the cycle time calculations. If this adjustment were not made, the program would use artificially low hours produced per RO per day figures when scheduling work.

  When a vehicle is towed in, attempt to schedule the vehicle into production just as you would any other job. If a thorough estimate is not available, schedule the repairs with an educated guess as to the hours required. You will have an opportunity to revise these numbers and the scheduling of this repair after the estimate is actually written. In the meantime, by scheduling the repair immediately, you have reserved a place in your schedule for the repairs on this vehicle to begin.

  To signify that this is a tow-in vehicle, highlight the job through **Updating R.O.s** and choose **Select** and then **Edit**. Select the **R.O. Info** tab. Check the box next to **Towed-In Vehicle**. A new box will appear labeled **Actual Date in Production**. When the towed-in vehicle is actually moved into production, enter the date in this field. This adjustment will enable CR Auto Scheduler® to most effectively schedule work.

  When the vehicle is flagged as a **Towed-In Vehicle**, another box also appears labeled **Revise Estimate Data**. When the actual estimate is completed, if the hours or sales on the estimate differ significantly from the educated guess previously entered, you may select this button and modify the number of hours or the estimated sales amount on this repair.

  When you save changes to the estimated hours and sales on a tow-in, you will be informed that the CR Auto Scheduler® program has used this new information to re-calculate how many production days are expected to be needed to repair the vehicle. The program will ask you if you would like to accept the newly calculated expected delivery date. Since this date is based upon the true information and the previous expected delivery date was based upon a guess, we recommend accepting this new date. If you do accept the date, it becomes the new **Estimate Date Out**.

- **Enter information about the actual time of repairs and final sales amounts** In the CR Auto Scheduler® program, you can enter information about the actual dates in and out for specific jobs. Information can also be entered regarding the hours and sales amounts on the final bill. With this information, the program can 'learn' the actual cycle time and supplement experience of the facility. This experience is then used to refine the scheduling process.

Highlight the job in the list of repairs under **Update R.O.'s**. Choose **Select** and then **Edit**. Select the **R.O. Info** tab. Enter the actual **Date In**, **Date Out**, **Metal Hours**, **Refinish Hours**, **and Sales $**.

If the cycle time or supplement experience would be skewed through the inclusion of a specific job, you may omit the job from the calculations. This may be necessary, for instance, if a job is delayed due to a national back ordered part. To omit the repair from the cycle time or supplement calculations for scheduling purposes, check the box next to **Omit From Cycle Time** or **Omit from Supplement**, respectively.

Due to the nature of extremely small jobs, we recommend excluding all repairs with fewer than 5 total hours from the cycle time calculations. This will enable the program to most effectively schedule future small jobs. These jobs can be automatically eliminated through the use of the System Options under Company Options found in the Options menu. To enable this automatic omission of very small jobs, select the following:

Select **Options ⇨ Company Options ⇨ System Options ⇨ Edit**

Check the box next to **Auto Eliminate Small Jobs Below Threshold**. Enter an appropriate **threshold percentage**. And then select **Save**.

The percentage is applied against the maximum number of hours on a small job. For instance, assume the percentage entered is 30% and that the maximum size of a small job is 15 hours. When the percentage is applied against the maximum size of a small job, an amount of 4.5 hours (15 hours x 30%) is obtained. When this option is checked, the CR Auto Scheduler® program will automatically omit all repairs with fewer than 4.5 hours from the cycle time calculations for scheduling purposes.

It is also recommended that any repair with a supplement in excess of 100% or less than -50% be omitted from supplement calculations. It is permissible for a collision center to have more stringent guidelines for omitting repairs from supplement calculations for scheduling purposes.

- ✓ **Updating Best Practices** In order for the program to work most effectively, it is necessary to update information regularly. Our recommendations on updating are shown below.
    - **Revising the expected delivery date** Following each day's production walk-through or release meeting, revise any expected delivery dates as necessary.
    - **When a vehicle arrives** Each day, update the RO# and the Actual Date In on each vehicle that arrives. If the vehicle was towed-in, also indicate this by checking the box next to **Towed-In Vehicle**.

- **When a towed-in vehicle enters production** Each day, enter the **Actual Date in Production** for any towed-in vehicle that moved into production.
- **When a vehicle has fewer than 5 total hours on the final bill** Use the **Company Options** to automatically omit from cycle time calculations any repair with five hours or less.
- **When a vehicle is delivered** Each day, update the Actual Date Out, Metal Hours, Refinish Hours, and Sales on each vehicle that was delivered.

Reports

- **Overview** Through **Reports,** a user can extract a variety of useful information from the program. Among the category of reports are:
  - Vehicle Drop-Offs;
  - Vehicle Deliveries;
  - Work In Process;
  - Week Day Analysis;
  - Supplements;
  - Cycle Time;
  - Lead Time;
  - Unscheduled Estimates;
  - Closing Ratio.

- **Vehicle Drop-Offs** This report includes a listing of the customers that are scheduled to drop off, or have already dropped off, vehicles for repairs during a user-specified time period. The listing includes items such as the customer name and phone number, descriptive information on the vehicle (e.g., make, model, color), and information on the repairs (e.g., payment source, estimated sales, expected delivery date, etc.). This information is grouped by day with daily subtotals for the number of vehicles to be dropped off and the hours and sales estimated on the repairs.

  By selecting a date range beginning today and extending for a week or two, the user would get a listing of the vehicles scheduled to arrive during that time period at the facility for repairs. The report will also list the total hours and sales that are scheduled to be dropped off during the selected time period.

- **Vehicle Deliveries** This report includes a listing of the customers that are scheduled to have, or have already had, vehicles delivered back to them repaired during a user-specified time period. The listing includes items such as the customer name and phone number, descriptive information on the vehicle (e.g., make, model, color), and information on the repairs (e.g., payment source, estimate hours, estimated sales, etc.). This information is grouped by day with daily subtotals for the number of vehicles to be delivered and the hours and sales estimated on the repairs.

  By selecting a date range beginning today and extending for a week or two, the user would get a listing of the vehicles scheduled to be delivered to customers during that time period. The report will also list the total hours and sales that are scheduled to be delivered during the selected time period.

- **Work in Process** This report includes a listing of customers that have vehicles that are in the process of being repaired as of a user-specified date. The listing includes items such as the customer name, descriptive information on the vehicle (e.g., make, model, color), and information on the repairs (e.g., payment source, estimate hours, estimated sales, etc.). The number of customers, estimated sales and estimated hours are totaled at the bottom of the report.

  By selecting today's date, the user would get a listing of the vehicles that are currently in process. The program considers a vehicle in process when it has an entered actual date in prior to the date selected and either no actual delivery date entered or an entered actual delivery date after the selected date.

- **Week Day Analysis** This series of reports lists the number and percentage of estimates written, vehicles dropped off, and vehicles delivered by day of the week for a user-specified time period. Reports are available that provide this information for the facility, for individual estimators, and for individual payment sources.

  These reports can tell the user if they are successfully eliminating the "X" (i.e., in on Monday – out on Friday) from their business.

- **Lead Time** This series of reports shows the number of days between the scheduling of the repairs and the vehicle drop off date for vehicles scheduled during a user-defined time period. This can be considered the time that the customer waits for repairs to begin. Reports are available that will show lead times for the facility or lead times by estimator, payment source, job size, and payment source by job size.

- **Supplements** There are two reports that provide measurements of the size of the supplements (i.e., the difference between the original estimate of the cost to repair the vehicle and the final bill for the repairs) for the repair facility. Both reports provide average supplement size, reported as a percentage of the original estimated cost, for work performed by the facility. They also provide average supplement size for jobs from: 1) each job size category defined by the user in the program wizard; 2) each payment source; and 3) each job size category within each payment source.

  - **Supplement Values for Scheduling** This report shows the current values being used by the program to adjust the size of jobs being scheduled. For instance, if this report shows 10.3 as the value for State Farm Medium jobs, then the next State Farm Medium job to be scheduled will have the hours increased by 10.3% when it is scheduled.

    This report is programmed to average a set number of the most current jobs in the database to determine the magnitude of supplements. If the database does not include enough data to meet the set number of observations, then the report will return a 0 value for that item. For instance, if there are not enough State Farm Large jobs to calculate the average supplement size on State Farm Large jobs, the report will show a 0 value under State Farm Large.

When a zero value is returned as the supplement factor for a payment source and size of job (e.g., State Farm Large), the program will still adjust the next scheduled vehicle from that payment source and size category by a supplement factor. The factor utilized will be the first non-zero value found in the following order: 1) Payment Source; 2) Size Category; 3) Facility; and 4) Wizard.

In the situation above where a zero value was returned in the report for a State Farm Large job, the search for a supplement value to use would be as follows:

- Payment Source: Is there a non-zero value for State Farm jobs? If there is, then use this value as the supplement adjustment. If there is not, then there are not enough State Farm jobs, regardless of size, to report a supplement factor for State Farm.
- Size Category: Is there a non-zero value for Large jobs? If there is, then use this value as the supplement adjustment. If there is not, then there are not enough Large jobs, regardless of payment source, to report a supplement factor for Large jobs.
- Facility: Is there a non-zero value for the facility? If there is, then use this value as the supplement adjustment. If there is not, then there are not enough jobs in the database to report a supplement factor for the facility.
- Wizard: Use the supplement factor entered into the Facility Wizard.

- **Actual Supplement History** This report uses all of the jobs delivered within a user-defined time period to calculate the magnitude of supplements. No minimum number of observations is required to return a value.

  For example, if a user ran this report with the date range of November 1, 2002 to November 30, 2002, then the report would return the average supplement size of work delivered in November of 2002. In addition to the total for the facility during that period, it would also provide averages for each payment source, size category, and size category within each payment source. The report will also indicate the number of observations that were used in each average.

  Extending this example, assume that the report returned a value of 12.3 with 2 observations for State Farm Medium jobs. This would mean that during November 2002, the store delivered 2 State Farm Medium jobs and that the supplement averaged 12.3% on those jobs.

Data from a particular repair can be excluded from both of these reports by selecting Omit from Supplement Calculations for that repair under **Update R.O.s**.

- **Cycle Time** There are three reports that provide measurements of the size of the cycle times for the repair facility. Two of the reports provide cycle time figures reported as the average number of hours produced per production day per repair order, for the facility. The other report provides cycle time figures reported as the number of calendar days to repair vehicles. Each of the reports provide cycle time values for jobs from: 1) each job size category defined by the user in the program wizard; 2) each payment source; and 3) each job size category within each payment source.
    - **Cycle Times Values for Scheduling** This report shows the current values being used by the program to determine the number of production days required to complete the repairs on a job being scheduled. For instance, if this report shows 4.2 as the value for State Farm Medium jobs, then the next State Farm Medium job to be scheduled will be scheduled assuming that 4.2 hours can be completed each production day.

    This report is programmed to average a set number of the most current jobs in the database to determine the magnitude of the cycle time. If the database does not include enough data to meet the set number of observations, then the report will return a 0 value for that item. For instance, if there are not enough State Farm Large jobs to calculate the average cycle time on State Farm Large jobs, the report will show a 0 value under State Farm Large.

    When a zero value is returned as the cycle time for a payment source and size of job (e.g., State Farm Large), the program will still use a cycle time factor when scheduling the next vehicle from that payment source and size category. The factor utilized will be the first non-zero value found in the following order: 1) Payment Source; 2) Size Category; 3) Facility; and 4) Wizard.

    In the situation above where a zero value was returned in the report for a State Farm Large job, the search for a cycle time value to use would be as follows:

        - Payment Source: Is there a non-zero value for State Farm jobs? If there is, then use this value as the cycle time. If there is not, then there are not enough State Farm jobs, regardless of size, to report a cycle time for State Farm.
        - Size Category: Is there a non-zero value for Large jobs? If there is, then use this value as the cycle time. If there is not, then there are not enough Large jobs, regardless of payment source, to report a cycle time for Large jobs.
        - Facility: Is there a non-zero value for the facility? If there is, then use this value as the cycle time. If there is not, then there are not enough jobs in the database to report a cycle time for the facility.
        - Wizard: Use the cycle time entered into the Facility Wizard.

- **Actual Cycle Time per Production Day** This report uses all of the jobs delivered within a user-defined time period to calculate the cycle times. No minimum number of observations is required to return a value.

  For example, if a user ran this report with the date range of November 1, 2002 to November 30, 2002, then the report would return the average cycle time of work delivered in November of 2002. In addition to the total for the facility during that period, it would also provide averages for each payment source, size category, and size category within each payment source. The report will also indicate the number of observations that were used in each average.

  Extending this example, assume that the report returned a value of 4.3 with 2 observations for State Farm Medium jobs. This would mean that during November 2002, the store delivered 2 State Farm Medium jobs and that the cycle time averaged 4.3 hours produced per production day on those jobs.

Data from a particular repair can be excluded from both of these reports by selecting **Omit from Cycle Time Calculations** for that repair under **Update R.O.s**.

- **Cycle Time in Cal Days by Payment Source** The user can select a date range on which to run this report. She can also choose either to exclude or include the data from repairs that were flagged as **Omit from Cycle Time Calculations** under **Update R.O.s**. This report shows the average number of calendar days that vehicles were in the repair process.

✓ **Job Size – Percentage of Total** This report shows the number of repairs by size category as defined in the facility wizard. It also shows the total hours on repairs, the average hours on repairs, and the percentage of hours produced on repairs sorted by job size category. This report was designed to provide information that would be useful to users when updating information in the facility wizard.

✓ **RO's Used** These two reports enable the user to trouble shoot unusual outcomes when scheduling. Occasionally the CR Auto Scheduler® program may return a scheduled repair time that seems significantly too long or too short to the user. Most often this arises from erroneous data in the database. The bad data could be the result of a data entry error (e.g., entering the wrong year, adding a 0 to the end of a sales or hours number, etc.) or the failure to omit an unusual repair from calculations used for scheduling. This bad data leads to unusually large or small supplements or cycle time figures used to schedule. These two reports allow the user to know which specific repairs are skewing the data.

- **RO's Used to Compute Cycle Time** In this report, the user selects a payment source option and a size or repair option. If no payment source or size is selected, then the report defaults to repairs from any payment source and of any size. Once a payment source and size is selected, the report returns a listing of the specific ROs that are currently being used to calculate the cycle time that would be used when scheduling a repair of this size from this payment source. This cycle time is the number that appears on the **Cycle Times Values for Scheduling** report for this payment source and size.

As an example, assume that the cycle time on Allstate Medium repairs in the **Cycle Times Values for Scheduling** report shows a figure of 0.25. This would mean that on recent Allstate Medium jobs this collision center has only produced 0.25 hours per day. On Allstate Medium jobs, the program will use this 0.25 hours per day figure. Thus, an Allstate repair with 20 hours on it will have over 80 days from drop off to delivery in our scheduling options. Obviously this is not appropriate.

By selecting the **RO's Used to Compute Cycle Time** report, and then selecting Allstate and Medium, the user will be able to see which repairs are being averaged to calculate the 0.25 hours per day figure. One of those repairs may show a cycle time of 0.05 hours per day and a total of 380 days to repair. If that were the case then it would seem likely that the user had entered a wrong year into either the actual drop off or actual delivery date fields. The user could select Update R.O.'s, find that particular repair, and either omit it from cycle time calculations or correct the data entry error.

- **RO's Used to Compute Supplements** This report is virtually identical to the **RO's Used to Compute Cycle Time** report. However, in this report, the user can obtain a listing of repairs that are currently being used to determine the supplement to use when scheduling repairs by payment source and job size. This report is generally used to trouble shoot unusual supplement figures in the **Supplement Values for Scheduling** report.

✓ **Unscheduled Estimates** These two reports track the customers that chose to not schedule their vehicle for repairs during the initial estimating contact with the facility during a user-specified time period. Customers are grouped by the current status of the repair. These statuses include Open, Followed Up, Will Not Schedule, and Scheduled. Repairs that have subsequently been scheduled are classified as scheduled. Repairs that the customer has indicated will not be repaired at this facility are listed as Will Not Schedule. Customers who have been contacted since the original estimating contact but that have not yet decided whether to schedule or not are shown as Followed Up. Any remaining customers are listed as Open.

- **Unscheduled Estimated** This report lists each of the customers who initially chose to not schedule their repairs, including such items as the customer name, descriptive information on the vehicle (e.g., make, model, color), and information on the repairs (e.g., payment source, estimate hours, estimated sales, etc.). The list is grouped by estimator and current status of the repair.

- **Unscheduled Estimate Analysis** This report shows the total number of customers for each status group by estimator and for the facility as a whole. It also totals the number of customers by status and the estimated sales and hours by estimator and by facility.

These reports allow a user to analyze how successful they are at converting estimates in to repairs when a customer initially leaves the premises without scheduling.

✓ **Closing Ratio** These two reports show the success rate of the estimators and the facility in generating repairs for a user-specified time period.

- **Closing Ratio - Estimator** This report shows, by estimator, the number of sales opportunities and the number of those opportunities that the estimator was able to schedule for repairs. The ratio between these two numbers is shown as the closing ratio. These numbers are also reported for the facility as a whole.
- **Closing Ratio – In Sales $** This report is very similar. However, instead of tracking sales opportunities, this report shows the estimated sales dollars on the opportunities and the estimated sales dollars on those opportunities that were scheduled for repairs. The ratio between these two numbers is presented as the closing ratio in this report.

Since there may be a time lag between when a sales opportunity occurs and when it is successfully scheduled, both of these reports allow the user to set a lag time to allow the sales opportunity to be scheduled. A lag time of 0 days causes any job that is not currently scheduled to count against the estimator's closing ratio. A lag time of two weeks will allow the estimator two weeks from the initial scheduling attempt to schedule the vehicle. If an opportunity is over two weeks old and has not yet been scheduled, it would count against the estimator's closing ratio. Finally, a lag time of four weeks will allow the estimator four weeks from the initial scheduling attempt to schedule the vehicle.

Unscheduled Estimates

- **Overview** Through **Unscheduled Estimates,** as discussed in the section on Scheduling a Repair, a user can launch the scheduling process. In addition, a user can continue the sales process with customers that initially chose to not schedule an appointment for repairs. Items that can be easily accomplished here are:
  - Estimate follow-up; and
  - Scheduling repairs.

- **Estimate follow-up** Too often in collision repair centers, customers are lost as a result of poor follow-up. The likelihood that a customer that has left a collision repair center with an estimate but no repair appointment will call the store up to schedule the repairs is very small. The collision repair center must be proactive in pursuing these customers or risk losing the work to a more aggressive and professional competitor.

  The CR Auto Scheduler® program makes it extremely easy for an estimator to follow-up with customers that do not schedule repairs immediately. When an estimator selects **Unscheduled Estimates**, a list of their open estimates is shown. This list is specific to the estimator that is logged in on the workstation. Thus, an estimator can obtain a follow-up list immediately that is current and specific to him or her.

  This list will provide basic information about the customer and the repair, including the customer's phone number(s). It also provides the reason that the customer gave for not scheduling the repair initially. With this information, the estimator could contact the customer and talk knowledgeably about the repair and the reason for the delay in scheduling.

  Using the **Edit** button on this screen, the estimator can 1) enter a new reason for not scheduling, if appropriate; and 2) change the status of the open estimate. The estimator can change the status to Followed Up or to Will Not Schedule. If after contacting the customer again the customer is still unwilling or unable to schedule the repairs, the estimator could change the status to Followed Up to show that she had already followed up at least once. This customer would remain in the **Unscheduled Estimates** list so that additional follow-up attempts could be made. If it is apparent that the customer will not have the vehicle repaired at this facility, the estimator can change the status to Will Not Schedule. This will remove this customer from the **Unscheduled Estimates** list which will keep the list manageable for the estimator.

- **Scheduling repairs** Refer to the section dedicated specifically to describing the scheduling process.

- **Unscheduled Estimate Best Practices** In order to utilize **Unscheduled Estimates** most effectively, we recommend the following practices:
  - **Daily Follow-up** Following up on open estimates must be consistent to be effective. We recommend having the estimator go to **Unscheduled Estimates** daily, preferably at the same time. During this time, the estimator can follow-up with customers as appropriate. For instance, if the expectation within the collision center is to contact these customers via the phone two days after the estimate was written, the estimator could call the customers on their list from two days earlier.
  - **Daily Updating** This list can become extremely long quickly. The longer it is, the less likely it is to be used as designed. Thus, it is important for the list to be kept current. This can be done by applying the following steps:
    - When it becomes apparent that a customer will not be having the repairs done at this collision repair center, change the status to Will Not Schedule.
    - When a customer schedules their repairs after initially choosing not to schedule, make certain that the repairs are scheduled through **Unscheduled Estimates** rather than by entering a new R.O. in **Enter R.O.**

Conclusion

- **Overview** With the guidance available within this manual and the support offered through 1-877-COLLISION, you should be positioned to write your own success story for how the CR Auto Scheduler® program has benefited your business.

  One final recommendation: As with any software program that is integral to the success of your business, you will not regret backing up the CR Auto Scheduler® program on a daily basis. If you are already creating a daily back up of the server on which you installed the program, then you should be all set. If not, we recommend you begin to do so.

  Thank you for using the CR Auto Scheduler® program.