

Chapter 7, “Working with the Estimate in CC3”

CC3 is not an Estimating Package. It is a Management Package; therefore you should make every effort to assure that you have an Estimate properly created in your Estimating Package (ADP, CCC, or Mitchell) before Bridging/Importing it to CC3. Most changes to an Estimate should be made back in the original Estimating Package and then Bridged/Imported again over the existing CC3 Estimate. A few exceptions to this practice might be when you have minor corrections or additions to the Estimate Header or internal operational notes you wish to add to the Estimate. Here’s what you can do to an Estimate in CC3; but again keep in mind that most of this should be done back in the original Estimating Package.

You can Edit the Estimate Header. When working in the Header Page, you have access to the “Head Code” to speed entry and make the entries uniform.

You can Edit , Add, or Delete lines from the Estimate. When working in the “lines area” of the Estimate you have access to “Short Codes” to speed entry and make uniform entries.

You should verify the totals that were transferred, paying particular attention to the Rates brought over and the Tax Rate Charged. If you are a shop receiving Assignments, then quite often the Tax may be wrong and really should have been corrected back in the Estimating Package, but definitely should be made right before converting to a REPAIR ORDER.

You can PRINT the Estimate, PRINT a Work Sheet (with or without times showing), or PRINT a Parts Order. (NOTE: We recommend waiting to print Work Sheets & Parts Orders until you have convert the Estimate to a RO and then print these from the RO.)

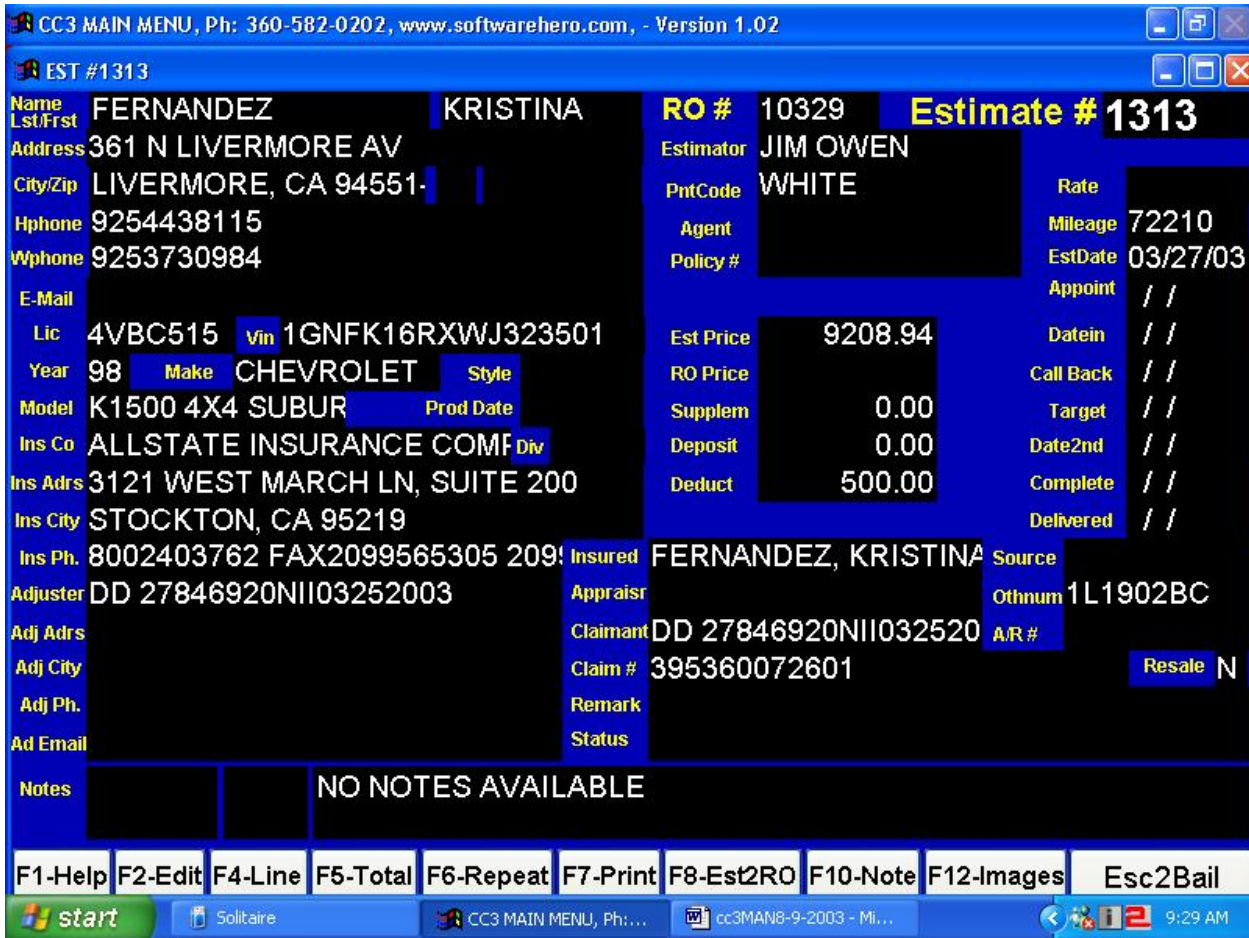
You can append Notations to the Estimate.

And when satisfied with the Estimate, you can CONVERT it to a REPAIR ORDER. During this conversion you are given the choice of automatic REPAIR ORDER Numbering, supplying your own number, or even overwriting an existing REPAIR ORDER. When overwriting you can retain entries from the existing REPAIR ORDER and append the new information, or you can simply replace everything. This is a way to re-use a REPAIR ORDER # that might otherwise be wasted and cause later concern. (i.e. The totaled out car that already had a REPAIR ORDER, but no charges against it.)

Now let’s get down to actual key strokes involved in working with an ESTIMATE. The left most panel of the MAIN MENU is the ESTIMATE Section, so use the Arrow Keys to move to that section.

You can enter a new estimate from the Main Menu under the heading “New Estimate” and this would need to be done if you do not have an independent estimating system, you are hand entering in an estimate from an insurance company, or you are opening a blank estimate to quickly convert into an RO for job-costing situations, like “car has arrived on the back of a flatbed truck” and we have either not received an assignment from the insurance company or have not had time to write the estimate.

Now decide how you want to call up an ESTIMATE. Normally you will use “EST. IN PROGRESS”, so highlight that line of the menu and press “ENTER” or click mouse. The header of the estimate will come up.



Across the bottom of the screen will be a listing of the available commands from this screen; they will be : F1=Help, F2=Edit, F4=Lines, F5=Total, F6=Repeat, F7=Print, F8=Est2RO, F10=Notation, and F12=Images. Let’s examine what each of these do:

F1, this will bring up CC3’s unique “HELP” screen. The help screen changes depending on which screen of the program that you are residing in when you press the F1 key. A unique feature of CC3’s help screens is the fact that they are “User Modifiable”. With a help screen showing, you can press “E” to enter the help screen edit mode. Make changes or additions as needed and use “PgDn” to save your work.

F2, will put you up into the “Header Page” of the ESTIMATE and allows you to edit most of the fields of that page. One field to really watch, is the “Rate Profile” this field chooses the rate profile to apply to the ESTIMATE. The various rate profiles were entered via the “SETUP/SHOP” area of the program. Choosing the wrong profile can completely change the totals on your ESTIMATE. If you have a master password in SETUP/ACCOUNTING, writer and source must be on the HEAD CODE list and Insurance company must be on the Vendor list to exit. If they are not, the system will tell you and force you to pick off the list. This is done so that your analysis reports will come out right. If this isn’t done you will get “ALL STATE INS.” and “ALL STATE INSURANCE” and “ALL STATE INSURANCE CO.”. This feature forces uniformity. Note that the picture above, does not show the resale category. The latest version of software has a T-True, F-False resale category that forces no tax to calculate, but more importantly separates any resale sales out on the #51 sales tax report. You can save yourself a little aggravation here by adding “UNKNOWN” to the popup list, and “Customer Pay” to the Vendor list, so if your writer just doesn’t know the source say, he can identify it as such “UNKNOWN”, and not just plug some useless information so he can get through his day.

“UNKNOWN” spelled just like this is also important when an estimate overwrites an RO, if the RO field has the word “UNKNOWN”, the system will allow the estimate information to overwrite the RO information for that field. So, if you have opened an RO not knowing who the car belongs to, to say post a tow bill to, and you write the estimate after the fact, when that estimate is overwritten on top of the RO, you want it to populate the RO with the insurance company, writer, source, and customer name from the estimate you are bridging in. In all 4 of these cases “UNKNOWN” will do that. So add “UNKNOWN” to the Vendor list with the “I” for insurance Code, and add “UNKNOWN” to the popup list as well.

F4 puts you into the lines of the ESTIMATE. Here you see the actual lines of the ESTIMATE and can add, delete, or modify the lines.

One thing that you’ll likely want to modify or add from this screen are the “DASH CODES”. ---If you’re not familiar with “DASH CODES” then now is the time to learn them and learn what they do. Most Body Shops run with various Departments, i.e. Paint, Body, Frame, Mechanical, and so on. Generally the Management of the shop wants to be able to track sales and costs for each of these Departments, thus the “DASH CODES” to direct where the sales dollars and cost dollars will be directed. Those lines with no DASH CODE will be directed to BODY for all labor times and to PARTS for all item costs. Appending a DASH CODE to the end of each Description will direct that line to the Department indicated by the DASH CODE. The DASH CODES in the ESTIMATE direct the “Sales Dollars”, while the DASH CODE in the REPAIR ORDER direct where the “charges” will be accrued against that job. For help with DASH CODES, press “F1” from the “lines section” of an ESTIMATE or REPAIR ORDER.

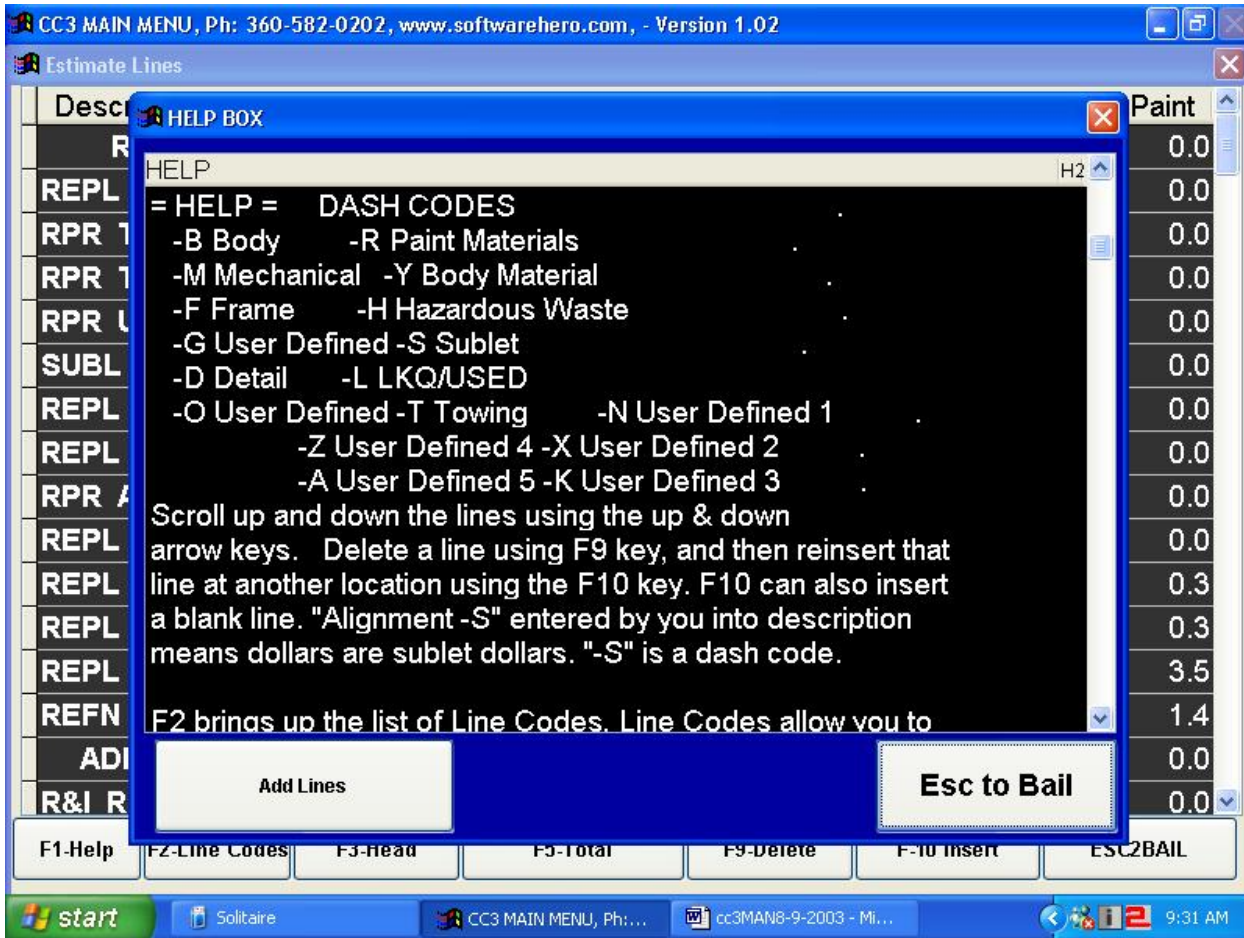
CC3 MAIN MENU, Ph: 360-582-0202, www.softwarehero.com, - Version 1.02

Estimate Lines

Description	Amount	Hour	Paint
REAR DOOR	0.00	0.0	0.0
REPL TAPE STRIPE, MATERIAL / SIDE-Z	10.00	0.0	0.0
RPR TAPE STRIPE, LABOR, .2 / PANEL	0.00	0.4	0.0
RPR TINT COLOR	0.00	0.5	0.0
RPR UNDERCOAT	0.00	0.2	0.0
SUBL MOUNT & BALANCE TIRE-S	20.00	0.0	0.0
REPL COVER CAR-Z	5.00	0.0	0.0
REPL BLEED BRAKES W/ FLUID-Z	4.00	0.5	0.0
RPR ADJUST PARKING BRAKE AND CABLES	0.00	0.3	0.0
REPL CORROSION PROTECTION-Z	8.00	0.2	0.0
REPL OEM RT HINGE ASSY DOOR SIDE UPPER	50.07	0.3	0.3
REPL OEM RT HINGE ASSY DOOR SIDE LOWER	55.41	0.3	0.3
REPL OEM RT DOOR SHELL	472.25	4.5	3.5
REFN ADD FOR CLEAR COAT	0.00	0.0	1.4
ADD FOR POWER UNITS	0.00	0.4	0.0
R&I RT WEATHERSTRIP OUTER AT BELT 1ST DE	0.00	0.0	0.0

F1-Help F2-Line Codes F3-Head F5-Total F9-Delete F-10 Insert ESC2BAIL

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F5, puts you into the TOTALS screen. This is the screen that forces recalculation of the ESTIMATE and give you the individual totals to review and compare against the original estimate from your outside estimating package. It is in this screen where you should look for variances if the bottom lines don't match. If they do not match, it is very likely that your Shop Setup in CC3 differs from your rates in the Estimating Package. From this screen you can modify the rates for one particular Estimate by pressing "F2".

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EST #40148

ESTIMATE TOTAL **0148**

Name: Woods, Lst/First: BMU, Address: 528, City/Zip: Est #40148

LABOR	UNITS	RATE	ESTIMATE	ESTIMATE	
Paint	2.4 @	60.00	144.00	Parts	670.70
Body	2.5 @	60.00	150.00	Paint Material	36.00
Mech.	0.0 @	75.00	0.00	Body Material	0.00
Frame	0.0 @	75.00	0.00	Hazardous Wast	7.20
WDO L	0.0 @	60.00	0.00	Sublet	0.00
Detail	0.0 @	30.00	0.00	LKQ	22.00
PREP	0.0 @	30.00	0.00	Towing	0.00
TOTAL	4.9		294.00	DISCOUNT	225.00
				ALS DISC.	0.00
				RENT CAR	0.00
				STORAGE	0.00
				MISC.SALE	0.00
			TOTALS	Items	960.90
				Labor	294.00
				Subtotal	1254.90
				Sales Tax	56.47
				Grand Total	1311.37

Function Keys: F1-Help, F2-Edit Rate, F3-Head, F4-Line, F7-Print, F10-Notes, Esc2Bail

Bottom Bar: F1-Help, F2-Edit, F4-Line, F5-Total, F6-Repeat, F7-Print, F8-Est2RO, F10-Note, Esc2Bail

F6, is the “REPEAT Key”. This allows you to take all the header information from the currently displayed Estimate and to create an new Estimate utilizing the information, but with a new Estimate Number. This can be a useful feature if running a totally separate Repair Order for customer pay or for two separate insurance companies.

F7, is kind of the universal “Print Key”; it will bring up a few print options here in the Estimate and many more options out in the Repair Order screen. The print options available here are Estimate, Work Sheet, Parts Order, and Follow Up Letter and Email Change Printer for faxing. Note; the Work Sheet and Parts Order printed from here are very rudimentary and it is recommended that you convert the Estimate to a Repair Order and then print these items from the Repair Order screen.

F8, is the “Estimate to Repair Order Conversion Key”. This will make a line for line copy of the Estimate to a Repair Order and you’ll wind up in the Repair Order ready to go to work; however there are a few questions you’ll have to answer during the conversion. First, you’ll be shown the next available Repair Order Number and will be allowed to either accept it or supply your own number. It is a lot simpler to allow CC3 to assign the numbers. The next three questions deal with dates; the date converted, the date sold, and the date targeted for completion. Note that this is the only time you can change test dates. The last question is whether you want to take a Detail Adjustment. This deducts from 0 to 9 percent from each of the labor hours and places those hours in the Detail Department. And finally the last option prior to completing the conversion is the STATUS. You may use “Header Codes” in this field, or type in your own status.

F10, allows notations to be added to the Estimate. As you get deeper into the workings of CC3, you'll grow to love this notation capability.

F12 Allows us to scan or import our images from our camera.

Let's now look at the "LINES" of the ESTIMATE. You do this by pressing "F4" from the ESTIMATE HEADER screen.

Description	Amount	Hour	Paint
OVHR FRT BUMPER ASSY	0.00	1.5	0.0
REPL A/M FRT BUMPER FACE BAR-N	225.00	0.0	0.0
REPL OEM FRT CTR BUMPER IMPACT STRIP	34.00	0.0	0.0
REPL OEM R FRT OTR BUMPER IMPACT STRIP	41.50	0.0	0.0
REPL OEM FRT BUMPER SPOILER	575.00	1.0	0.0
REFN FRT SPOILER	0.00	0.0	2.0
REPL USED R FRT BUMPER IMPACT ABSORBER-L	22.00	0.0	0.0
REPL OEM R FRT BUMPER MOUNTING BRACKET	6.70	0.0	0.0
REPL OEM FRT BUMPER LICENSE BRACKET	9.10	0.0	0.0
REFN CLEAR COAT	0.00	0.0	0.4
PAINT/MATERIALS-R	36.00	0.0	0.0
HAZARDOUS WASTE DISPOSAL-H	7.20	0.0	0.0
PARTS DISCOUNT/MARKUP	4.40	0.0	0.0

F1-Help F2-Line Code F3-Head F5-Total F7-Print F9-Delete F-10 Insert ESC2BAIL

Across the bottom of the screen will be a listing of the available commands from this screen; they will be F1=Help, F2=Line Code, F3=Head, F5=Total, F9=Delete, and F10=Add Lines. Most of these we've already examined, so we'll just look at what the new ones do:

F2, brings up a screen of "Line Codes" that can be used to build, or add to lines in the Estimate.

F9, deletes the highlighted line in the Estimate.

F10, adds a line to the Estimate.

NOTE:

Remember that this is the time to apply DASH CODES to direct where the "Sales Dollars" of the RO will fall. A critical shift in how an estimate is entered into a management system has occurred here. You want to seriously consider entering the estimate as the insurance company has agreed to pay it, not

as you are going to job-cost it. If the insurance company estimate says “1 hour Color Sand & Buff - Body Time” which would belong to the painter not your body man, but the insurance company isn’t going to pay paint materials on, you can enter 1 hour body time in the estimate, but adjust the hour over to the painter on the work sheet in F2-Work Order in the RO. Another example is ins. co. pays you “Alignment \$100” but your mechanic is going to align it on your rack for 2 hours. Enter “\$100” on the estimate, hand out 2 hours of mechanical on the work order, then balance the revenue with the “Money Grabber” in the RO under F6-Closeout J-Jobcost. The effort here is to keep the documentation that the ins. co. and customer are looking at the same. Less confusion, and supplements are easier to generate. Before tools like the “Money Grabber” were available. Basically you are able to, behind the scenes, work your job-costing “separate” from your RO. Without tools like the “Money Grabber” unique to this software, this is simply not possible.