R.O. File Jacket Template Instructions

Purpose:

The purpose of the Job Jacket is to enable your collision center to be more efficient and effective in handling repair order and job status information and communication.

- Organize paperwork
- Enable accurate and timely communication with the customer, production, and insurer
- Improve productivity and cycle time by tracking jobs with pending parts orders, sublets, and supplements

A file jacket is the best way to organize all the paperwork for a repair job. The pocket folder enables all paperwork to for the job to be collected in one spot.

The Job Jacket Template can be printed on a standard "pocket folder" available from your office supply provider or through a print shop. It consists of two pages for the front and the back of the jacket:

1) The front-page template is appropriate for use by everyone.
2) The back page is intended only for those who wish to do job costing manually. If you either have a computerized management system or chose not to job cost, you will not need this side.

Organization of Job Jackets

Many collision centers successfully utilize a system of wall racks to organize and file their pending job jackets. They will organize racks by job status category and then insert each job jacket in the appropriate area. Unless a file is actively being updated, it should always be in the file rack.

Some typical wall rack categories might include:

- Job Pending
- Parts Ordered
- Body / Frame
- Sublet / Mechanical
- Refinish
- Re-assembly
- Hold for Supplement
- Detail

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Front Side:

Instructions

1. **Pre-stuff jackets with**

   - ❑ Authorization for Repair
   - ❑ Pre-repair Inspection Form
   - ❑ Authorization and Direction to Pay
   - ❑ Pre-delivery Inspection Form
   - ❑ Warranty (Collision Center & BASF)

2. **As soon as the job is "SOLD", initialize the file jacket with the following information**

   - ❑ R.O. Number
   - ❑ Customer Name
   - ❑ Vehicle description (year, make, model, color)

   - ❑ Customer Phones and email
   - ❑ License #
   - ❑ Insurance Company and adjuster information
   - ❑ Check photos sent (if applicable)

   - ❑ VIN and Paint Code
   - ❑ List any "Special Instructions"
   - ❑ Enter amount of Deductible and any Betterments
   - ❑ Enter any prepayments in the payment record

3. **Add the following documents to Job Jacket as job progresses**

   - ❑ Customer Information Form
   - ❑ Original Damage Report
   - ❑ Repair Order
   - ❑ Requests for Supplement
   - ❑ Supplements
   - ❑ Copies of Parts invoices
   - ❑ Copies of Sublet invoices & tow bills

4. **When the vehicle is received, record the following information**

   - ❑ Date In
   - ❑ Delivery Target

5. **When the vehicle is dispatched, enter**

   - ❑ Body Tech / Team
   - ❑ Paint Tech / Team

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6. **When parts are ordered or received, enter applicable information under Parts Orders**

7. **List all sublet operations under Sublet Items from the final damage report and enter additional information as sublets are performed and invoices received**

8. **As the repair progresses**

   - Place checkmarks in the boxes across the top of the jacket as each event occurs
   - Add "Notes" as needed

9. **When the R.O. is complete**

   - Enter Final RO Total and enter amounts paid in payment record and calculate any amount due
   - Check paid in full, job closed, and initial when appropriate
   - Total Parts order data and sublet items for Total Sales and Cost and carry amounts to the other side (if job costing)

Back side (Job Costing):

1. **Enter only R.O. Number and Customer Name at top**

2. **Enter Labor cost information, by Body, Frame, Mechanical or Paint & Detail as techs are stubbed:**

   - Employee Name
   - Date (i.e. payroll date)
   - Flagged hours
   - Labor Sales Rate ($ per Hour)
   - Total Labor Sales (Hours X Labor Sales Rate)
   - Pay Rate ($ per Hour)
   - Labor Cost (Hours X Pay Rate)

When job is complete, Total Labor Sales and Labor Cost

Job Cost Summary

- Enter P&M total from the final RO, estimate a P&M Cost based on recent P&M gross profit. (i.e. if you recent P&M gross profit is 30%, calculate at P&M cost as 70% of P&M Sales
- Enter Sales and Cost information for Labor, Parts, P&M, and Sublet Totals
- Reconcile subtotals with the final RO
- Calculate GP$ and GP% for each category and the Total
- Add sales tax per the final RO

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R.O. _____ Cust. _____ Veh. Year: ____ Make _____ Model _____ Color _____

☐ Parts Ordered ☐ Parts Received ☐ Sublet Scheduled ☐ Sublet Complete ☐ Supplement

Customer Phone
Home: _____
Work: _____
Cell: _____
Email: _____

License #: _____
Insurance Company: _____
Claim #: _____
Adjuster Name: _____
Phone #: _____

☐ Supplement Approved

Date In: _____
Delivery Target: _____
Date Dispatched: _____
Date Completed: _____
Date Delivered: _____

☐ Photographs sent

Body Tech / Team _____

VIN: _____
Paint Code: _____

Paint Tech / Team _____

Sublet Items

Date	Vendor	Invoice #	Amount	Cost
			$	$
			$	$
			$	$
			$	$
			$	$
		Totals:	$	$

Parts Orders

Date	Vendor	Invoice #	Amount	Cost
			$	$
			$	$
			$	$
			$	$
			$	$
			$	$
			$	$
			$	$
			$	$
			$	$
			$	$
		Totals:	$	

Special Instructions:

_____
_____
_____
_____

Notes:

_____
_____
_____
_____
_____
_____
_____

Deductible $ _____
Betterment $ _____
Final RO Total _____

Payments

Date	Amount	Balance
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$

☐ Paid In Full
☐ Job Closed

Date: _____ Initials: _____

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R.O. _____ **Customer** _____

Job Costing

Labor	Employee	Date	Hrs.	Sales Rate	Labor Sales	Pay Rate	Labor Cost
Body							
	Totals:						
Frame							
	Totals:						
Mech.							
	Totals:						
Paint & Detail							
	Totals:						

Job Cost Summary	Sales	Cost	GP$	GP%
Body Labor	$	$	$	%
Frame Labor	$	$	$	%
Mech. Labor	$	$	$	%
Paint Labor	$	$	$	%
Parts (from other side)	$	$	$	%
P&M	$	$	$	%
Sublet (from other side)	$	$	$	%
Total	$	$	$	%
Sales Tax	$			
RO Total	$			

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