



# Computerized Tire Dealer Information System

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## J-Estimate

Automatic Estimate Tracking  
for Continuity of  
Salesperson and Customer  
Order Processing

1. Automated estimate **follow-up**
  - to ‘ask’ for the sale – email, text, phone
  
2. Automated ‘sales person **trigger**’
  - for next time vehicle is serviced **at any of your locations** to remind the salesperson of the pending estimate and to ask for the sale
  
3. Automated full/partial **recovery** and order creation (with updated selling price) based on the original estimate items
  
4. Automated **tie-in**
  - To **J-Match** and **J-Schedule** based on user access to dealer’s company web site

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**I. Create a new estimate order**

A. O/E option **2**

**E** Enter

Follow screen prompts

B. If in a **work** order

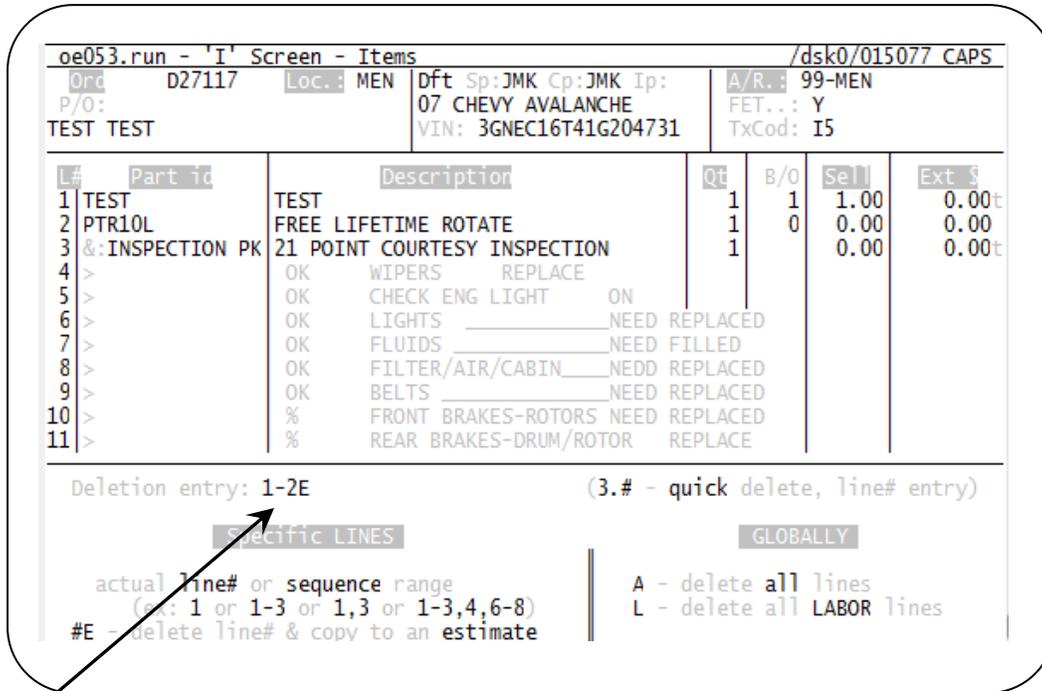
can use '**I**' screen option **8S**

Switch from **work** order to **estimate** order

## II. System Conversion Of “Work Order Lines” To A New or Existing Estimate Order

### Screen 1

From any **Work Order**, when on the **I** screen  
Select the option to **delete (3)** to display the screen below.



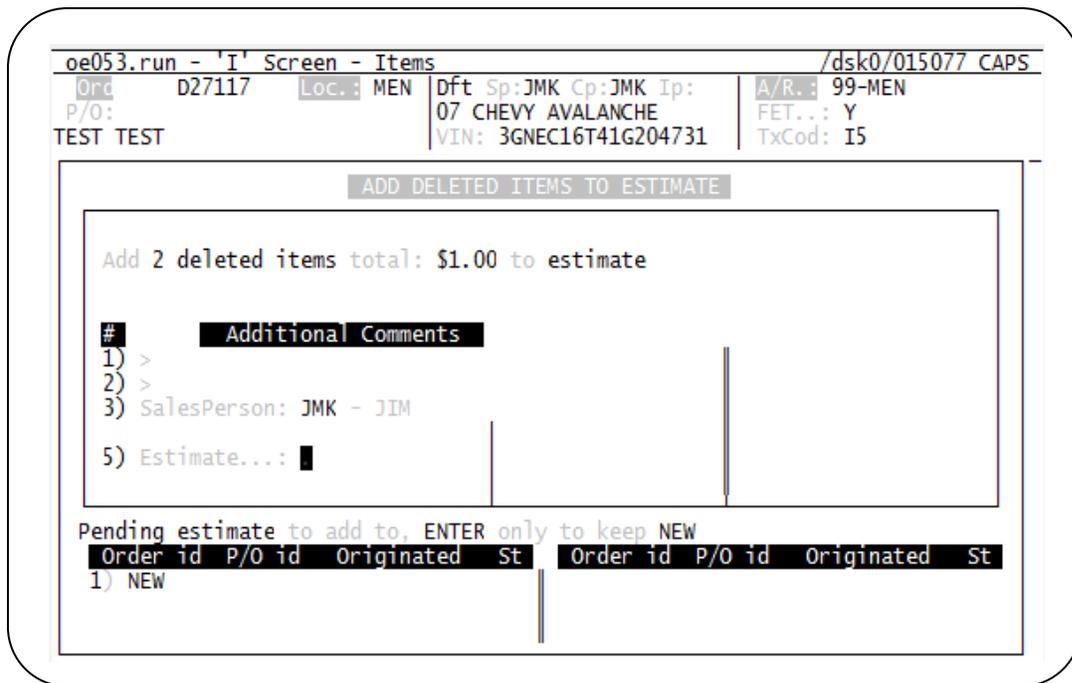
Enter the desired **line number** followed by an uppercase **E**  
to **move** that item from the **work order** onto an **estimate**  
i.e. to move line **1** from this work order on to  
an estimate, enter **1E**

After selecting a line to be deleted, the system will prompt **Y/N** to re-sequence the remaining lines.

Resequence the remaining line items (Y/N) ? N

Next screen prompts option to SAVE deleted items to an ESTIMATE

## Screen 2



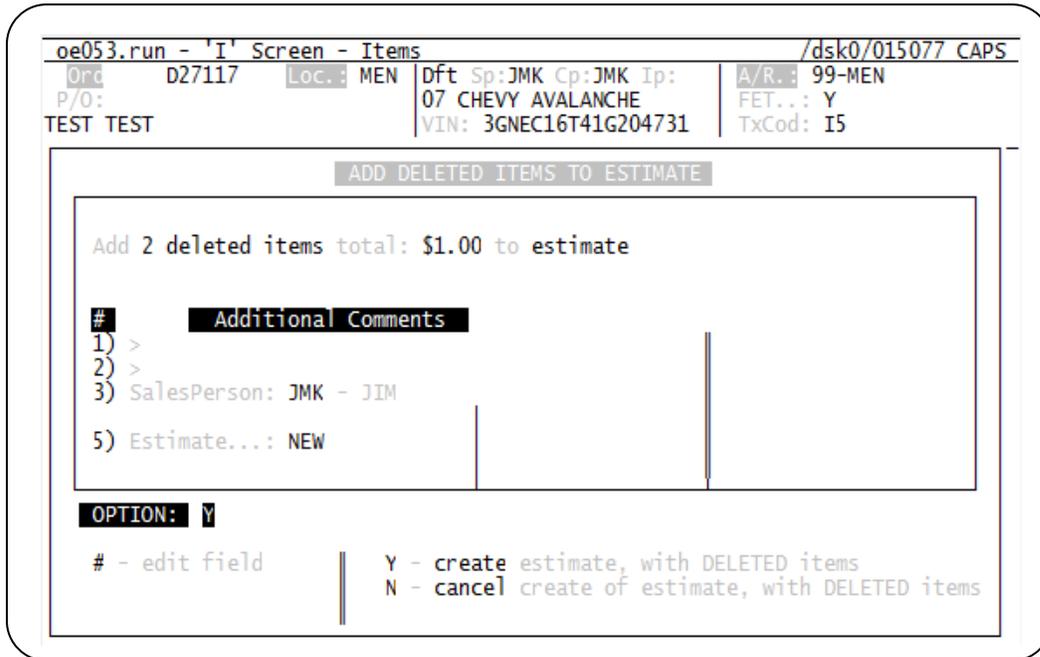
### Options:

1. Creating the **new** estimate order or adding to an **existing** estimate order
2. Editing

Fields 1 & 2      Comment Lines added to new estimate

Field 3              Salesperson Assignment to the new estimate

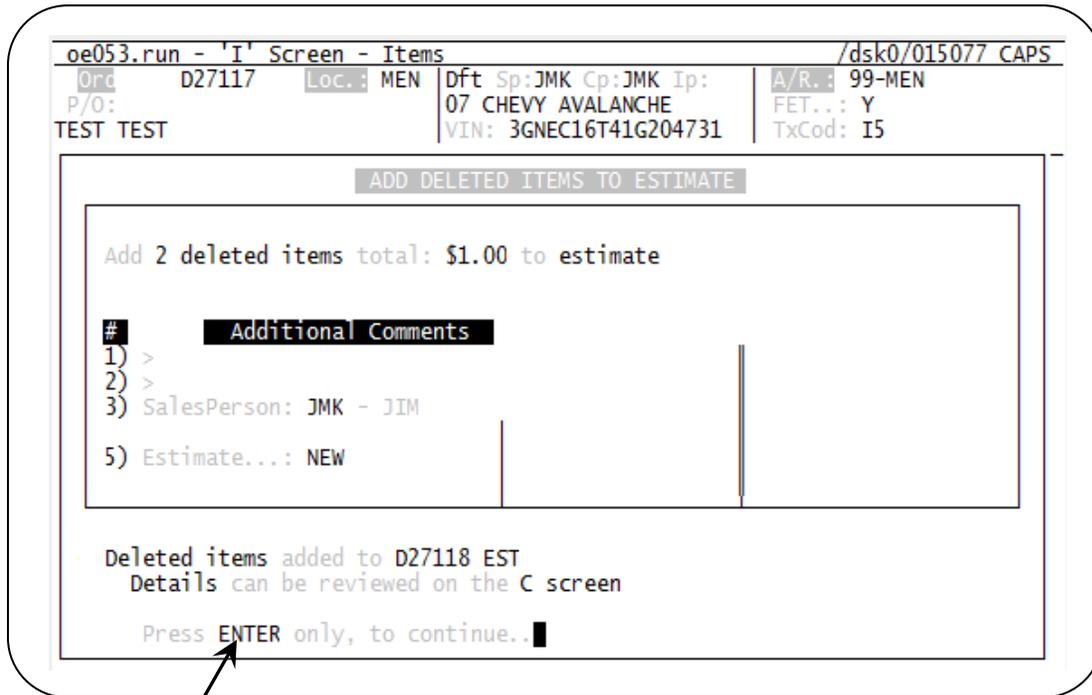
Screen 3



After entry selection, system will:

1. Ask for actual **Cancel** or **Create** of the estimate order
2. Display the **estimate order ID** to be effected.

Screen 4



System will verify final action to user

```
oe053.run - 'C' Screen - 'Order' Comments /dsk0/015077 CAPS
  Lines 1-6 print BOTH on the final 'INVOICE' and the 'WORK ORDER'
1)
2)
3)
4)
5)
6)
  Lines 7-18 print ONLY on the 'WORK ORDER'
7) 03/22/17 2:13p 2 deleted to D27118 EST tot: $1.00
8) .....
9)
10)
11)
12)
13)
14)
15)
16)
17)
18)
Enter an exact comment, or search path:  || Use DOUBLE entry leadoff, for
=ABC - search by Comment CODE          || FULL SCREEN search list
\ABC - search by Comment TEXT
TEST TEST                               A/R:99-MEN Typ:Ret  Cls:RETAIL  Or: D27117
```

System will add **comments** documenting

1. Moved item from this work order to the selected estimate order
2. The target Estimate Order used.

☞ This order will also have a comment line referencing the original work order as the **source** of the items added.

Sample of Created Estimate

oe053.run - 'I' Screen - Items				/dsk0/015077			
Est: D27118 EST		Loc.: MEN	Dft Sp: JMK Cp: JMK Ip: ---	A/R.: 99-MEN			
P/O: TEST TEST		07 CHEVY AVALANCHE		FET.: Y			
		VIN: 3GNEC16T41G204731		TxCod: I5			
L#	Part id	Description	Qt	B/O	Sell	Ext \$	
1	TEST	TEST	1	1	1.00	1.00t	
2	PTR10L	FREE LIFETIME ROTATE	1	1	0.00	0.00	
3							
4							
5							
6							
7							
8							
9							
10							
11							
<b>Opt:</b>		<b>L# Edits</b>		<b>Searches</b>		<b>Itm SubT: 1.00</b>	
<u>All Options</u>		1 - ADD		DI or // or /xxx		Add/Disc	
		2 - CHANGE		-item history		6.500%Tx 0.07	
		3 - DELETE		F=ABC -item or desc		<b>SubTOTL: 1.07</b>	
E20 - process Order		4 - Next Pg		7- VOID Order		\$\$ Recvd:	
				X- save & exit Order		<b>NetDUE\$: 1.07</b>	

This estimate has the same customer and vehicle information as the original work order.

### Comment Screen for the new estimate

```
oe053.run - 'C' Screen - 'Order' Comments /dsk0/015077
Lines 1-6 print BOTH on the final 'ESTIMATE' and the 'WORK ORDER'
1)
2)
3)
4)
5)
6)
Lines 7-18 print ONLY on the 'WORK ORDER'
7) 03/22/17 2:07p 2 added from D27117 MEN tot: $1.00
8) .....
9)
10)
11)
12)
13)
14)
15)
16)
17)
18)
Enter an exact comment, or search path: | Use DOUBLE entry leadoff, for
=ABC - search by Comment CODE          | FULL SCREEN search list
\ABC - search by Comment TEXT
TEST TEST                               A/R:99-MEN Typ:Ret Cls:RETAIL Es: D27118
```

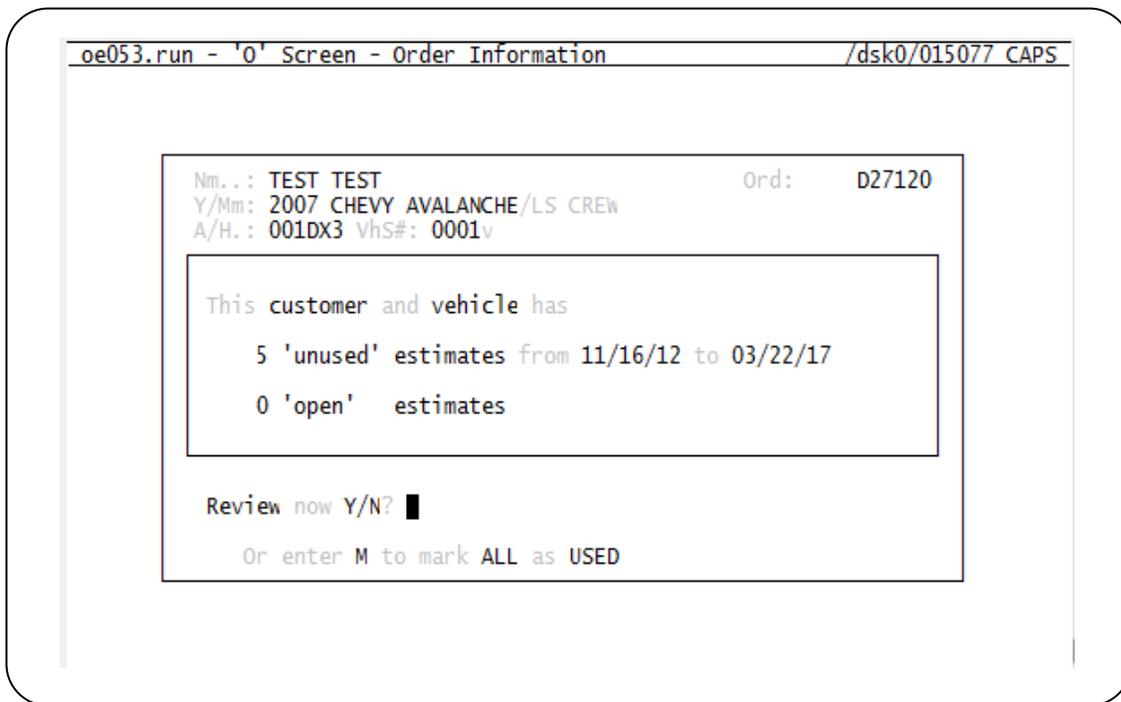
This comment screen documents the **source** work order for the items on the I screen.

When the source work order is finalized, system will also allow you to finalize this estimate

Based on vehicle and customer, this order is created or accessed for this Account History, Customer ID, and Vehicle ID regardless of store location, system will advise salesperson of **unused** 'estimates' to discuss with customer when

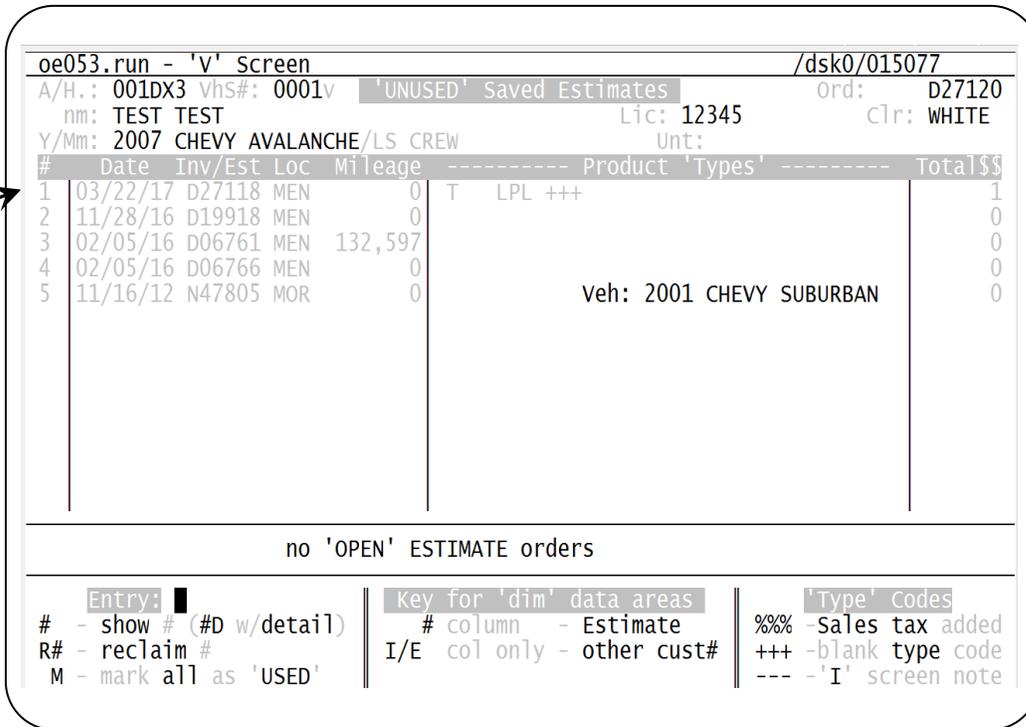
1. New work order create
2. Other searches for the customer and vehicle.

Sales person can optionally review and recover to the current work order.



System will also show unused estimate from VU screen option

Tracking on **VU** Screen – ‘**UNUSED**’ estimates



```

oe053.run - 'V' Screen /dsk0/015077
A/H.: 001DX3 Vhs#: 0001v 'UNUSED' Saved Estimates Ord: D27120
nm: TEST TEST Lic: 12345 clr: WHITE
Y/Mm: 2007 CHEVY AVALANCHE/LS CREW Unt:
# Date Inv/Est Loc Mileage ----- Product 'Types' ----- Total$$
1 03/22/17 D27118 MEN 0 T LPL +++ 1
2 11/28/16 D19918 MEN 0 0
3 02/05/16 D06761 MEN 132,597 0
4 02/05/16 D06766 MEN 0 0
5 11/16/12 N47805 MOR 0 Veh: 2001 CHEVY SUBURBAN 0

no 'OPEN' ESTIMATE orders

Entry: █
# - show # (#D w/detail)
R# - reclaim #
M - mark all as 'USED'

Key for 'dim' data areas
# column - Estimate
I/E col only - other cust#

'Type' Codes
%% - Sales tax added
+++ - blank type code
--- - 'I' screen note
    
```

This screen will show un-fulfilled (or open) estimates for this customer allowing you to build upon past experience.

**Options:**

- # Line number entry to select that Invoice/Estimate
- R# Reclaim selected Invoice or Estimate
- M Mark all Invoices/Estimates as ‘USED’

Showing Reclaim screen example:

There will be two setup screens

1. Defines **which** items to use

```

oe053.run - 'V' Screen /dsk0/015077
A/H.: 001DX3 vhs#: 0001v 'UNUSED' Saved Estimates Ord: D27120
nm: TEST TEST Lic: 12345 Clr: WHITE
Y/Mm: 2007 CHEVY AVALANCHE/LS CREW Unt:
RECLAIM: ITEM Selection

D27118 Loc: MEN Date: 03/22/17 Tot: $1.07 Pft: $1.07 Itms: 2

Item count=> 'non-file'.: 0 labor.: 1 regular.: 1

Enter Item Selection option.: A

Options:
A - copy ALL of the original order's items
S - Select on an item-by-item basis
##### - copy only that specific item id
X - do not copy any items, only setup new order
    
```

2. Defines **sell price** to use

```

oe053.run - 'V' Screen /dsk0/015077
A/H.: 001DX3 vhs#: 0001v 'UNUSED' Saved Estimates Ord: D27120
nm: TEST TEST Lic: 12345 Clr: WHITE
Y/Mm: 2007 CHEVY AVALANCHE/LS CREW Unt:
RECLAIM: ITEM Selection

D27118 Loc: MEN Date: 03/22/17 Tot: $1.07 Pft: $1.07 Itms: 2

Assign sell price for all items added based on:

Retain flat rate entries for labor items.....:

Options:
Y - reuse original sell price
N - ask for sell price for all items
X - cancel RECLAIM: ITEM Selection and proceed to edit new order
    
```

 **Non file** items will ask on reuse of original estimate **cost of good sold** value  
**Labor** items will confirm **flat rate** entry.

**III. Recovery of unused Estimate order items to a new work order.**

L#		Part id	Description	Qt	B/O	Sell	Ext \$
1	→	TEST	TEST	1	1	1.00	0.00
2		PTR10L	FREE LIFETIME ROTATE	1	0	0.00	0.00
3							
4							
5							
6							
7							
8							
9							
10							
11							

<b>Edit:</b> LINE 1..:			Mfg I:		Itm Subt:	
21-Part	26-Sell	32-DOT	ic\$= 0.00	uPft: 1.00	Add/Disc	
22-Desc	27-Disc\$	33-Sals/P	sC\$= 0.00	uCst: 0.00	6.500%Tx	
23-COGS	28-Disc%	34-Inst/P	avil: 0	FET: 0.00	<b>SubTOTL:</b>	0.00
24-Qty	29-FET		cmmt: 0	%Pft: 100.0%	\$ \$ Recvd:	
25-B/O	30-Tax?				<b>NetDUE\$:</b>	0.00
					w/O B/O\$:	1.07

On item selection:

Line item shown on new work order

L#	Part ic	Description	Qt	BC	Sell	Ext \$
1	ROBTEST1	ROB'S MF CODE #4	1	1	99.50	99.50t
2	JRWS15/5/216BBT	215/60R15 B BRIDGESTONE RADIAL	2	2	80.00	160.00t
3	>	BLIZZAK				
4	ROBTEST1	ROB'S MF CODE #4	1	1	99.50	99.50t
5						
6						
7						
8						
9						
10						
11						

<b>Opt:</b> <input type="checkbox"/> <input type="text" value="All Options"/> See screen: VC	<b>L# Edits</b> 1 - ADD 2 - CHANGE 3 - DELETE	<b>Searches</b> DI or // or /xxx -item history F=ABC -item or desc H-Screen id list X- EXIT Order	Itm SubT: 359.00 Add/Dis: 17.94 7.000%Tx 26.39 <b>SubTOTL:</b> 403.33 \$\$ Recvd: <b>NetDUES:</b> 403.33
----------------------------------------------------------------------------------------------------	--------------------------------------------------------	------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------------------------

System will **add comments** documenting moved item to this work order from the selected estimate

```
oe053.run - 'C' Screen - 'estimate order' comments /dsk0/010013 CAPS
  Lines 1-6 print BOTH on the final ESTIMATE and the WORK ORDER
1)
2)
3)
4)
5)
6)
  Lines 7-18 print ONLY on the WORK ORDER
7) 02/10/15  4:46p 2 added from B0078S BLM tot: $259.50
8) 02/11/15  1:42p 1 added from B0078R BLM tot: $99.50
9) .....
10)
11)
12)
13)
14)
15)
16)
17)
18)
  Enter an exact comment, or search path: || Use DOUBLE entry leadoff, for
    =ABC - search by Comment CODE         || FULL SCREEN search list
    \ABC - search by Comment TEXT
ROB'S LOC #1          A/R:99-BLM Typ:Ret  C1s:RETAIL   Es: B0078V
```

B. From 'VS' screen can use **R#** to 'Reclaim' an estimate back to an order

oe053.run - 'V' Screen /dsk0/010013 CAPS

A/H.: 003BZW Vhs#: 0001^ Vehicle SPECIFIC Information Ord: B00806 EST  
 nm: ROB'S LOC #1 Lic: 111222 IL Clr: SILVER  
 Y/Mm: 2007 FORD ESCAPE/XLS SPORT UTILITY Unt:

#	Date	Inv/Est Loc	Mileage	Product	Types	Total\$
1	12/24/15	B007HP BLM	57,654	P L	---	92
2	07/06/15	B007FV BLM	2	L	LA G	159
3	03/11/15	B0079R BLM	3	L	+++	37
4	03/11/15	B0079U BLM	2	L	+++	37
5	03/11/15	B0079X BLM	1	L	+++	37
6	03/11/15	B0079Z BLM	111	L		70
7	03/04/15	B007A0 BLM	1			0
8	02/16/15	B0078W BLM	1,111	L	+++	37
9	02/13/15	B0078X BLM	59,734	TP	+++ LUP SS %%%	123
10	02/13/15	B0079D BLM	60,002	TP	+++ LUP SS %%%	123
11	02/10/15	B0078M BLM	57,634	TP	+++ LUP %%%	10
12	02/10/15	B0078N BLM	57,750	T	+++ %%%	112
13	02/10/15	B0078P BLM	57,800	L	T +++ SS %%%	149
14	02/10/15	B0078Q BLM	57,825	T	LUP SS %%%	115
15	01/22/10	B05025 BLM	0	T L	+++ Veh: 2000 FORD (blank)	143

[ENTER only, for more]

Entry: █

# - show # (#D w/detail)      # column - Estimate      %%% -Sales tax added  
 R# - reclaim #                    I/E col only - other cust#      +++ -blank type code  
 P# - reprint #                    --- -'I' screen note

Lines 8 and 15 are shown as **ESTIMATES** by **reduced** intensity display as shown above.

First screen of RECLAIM process

```

oe053.run - 'V' Screen /dsk0/010013 CAPS
A/H.: 003BZW VhS#: 0001^ Vehicle SPECIFIC Information Ord: B00806 EST
nm: ROB'S LOC #1 Lic: 111222 IL Clr: SILVER
Y/Mm: 2007 FORD ESCAPE/XLS SPORT UTILITY Unt:
RECLAIM: ITEM Selection
-----
B0078W Loc: Date: // Tot: $0.00 Pft: $0.00 Itms: 0
-----
Item count=> 'non-file': 0 labor.: 0 regular.: 0

Enter Item Selection option.: A

Options:
  A - copy ALL of the original order's items
  S - Select on an item-by-item basis
  ##### - copy only that specific item id
  X - do not copy any items, only setup new order
    
```

Second screen of RECLAIM process

```

oe053.run - 'V' Screen /dsk0/010013
A/H.: 003BZW VhS#: 0001^ Vehicle SPECIFIC Information Ord: B00806 EST
nm: ROB'S LOC #1 Lic: 111222 IL Clr: SILVER
Y/Mm: 2007 FORD ESCAPE/XLS SPORT UTILITY Unt:
RECLAIM: ITEM Selection
-----
B0078W Loc: Date: // Tot: $0.00 Pft: $0.00 Itms: 0
-----

Assign sell price for all items added based on:

Options:
  Y - reuse original sell price
  N - ask for sell price for all items
  X - cancel RECLAIM: ITEM Selection and proceed to edit new order
    
```

#### **IV. Save an estimate order**

Process with O/E “E” screen option **20**

Able to view on customer vehicle for service history and later recover as needed.

## Appendix:

### Option Activation:

O/E option 28 **FC** record

```
oe104.run - O/E Code File Maintenance (OECODE) /dsk0/010013 CAPS
OECFC1
FC - Feature Control
90) Location:
    Enable ESP Apps
1) Enable access to JMK Library..: Yes
2) Enable LS screen.....: Yes
3) Track deleted items to estimat: Yes
4) Enable J-DOC.....: Yes
5) Enable CARFAX service history.: Yes
6) Enable CARFAX quick VIN.....: No
7) Enable J-Doc plus.....: No
8) O/E opt #29 (OE038)..: Yes

Option: __
Press INSERT to update or END to exit
```