



208.947.1738
www.summitcrs.net

KPI Net Training & Reference Guide

KPINet.....	1
Launching KPINet.....	1
Loading your Data	2
Step 1	2
Step 2	2
Step 3	2
Step 4	3
Editing Your Data	4
Area's.....	4
(1) Filter Area	4
(2) Data Area.....	4
(3) Row Area.....	4
(4) Column Area.....	4
Adding Fields	5
Field List.....	5
Customer	5
Vehicle.....	5
Rental Car Company.....	5
Insurance Company	5
Repair Order.....	6
Marketing.....	6
Accounts Receivable.....	6
Production.....	6
Parts and Sublets.....	6
Labor and Techs.....	6
Dates.....	7
Sales and Costs	7

Rates.....	7
Organizing Data	8
Sort	8
Filter.....	8 Drag
and Drop.....	8
Right Click Menu	8
Saving Your Data.....	9
Save.....	9
Remove.....	9
Export/Print	9

KPINet

Summit's KPINet is a pivot table based custom report engine. Collision Repairers will be able to sort, count, and total almost any data available in Summit. Take your time when reviewing this guide as there are literally millions of report possibilities.

Launching KPINet

The screenshot displays the Summit System Module interface. At the top, there is a header with the title 'System Module' and a search bar containing 'Fridley Auto Body'. Below this, a summary section shows job details: Est #: 6251, RO #: 19293, Est Nm: SUBLET, Ins Co: Ahens Ins, Deduct: \$0.00, Images: 0, B Tech, P Tech, C Tech, Sch In: 5/24/2016, OP: 5/24/2016, Sch Out: 5/24/2016, Status: Damage Analysis, L, Contact: None, Rpr Start, Warning, and PARTS: 0. A navigation bar includes 'Jobs', 'Admin', 'Line Items', 'Parts', 'Job Costs', 'Media', 'Schedule', 'Reports', and 'Messages'. Below the navigation bar, a breadcrumb trail shows '100-Assignments / 101-Estimates / 102-Open ROs / 103-Closed ROs / 104-Voided / 105-Lost Business'. The main area features a table with columns for R.O. #, Sch In, Sch Out, Job Class, TT, CDR, Dept/Status, Total, Ins, Estimator, and Customer. A 'Quick Menu' is open over the table, listing options like 'Labor Analysis', 'Sales In Process Analysis', 'Job Class Analysis', and 'KPINet'. The 'KPINet' option is highlighted. The table rows are grouped by 'RO List-102', 'Production-112', 'Job Costs-122', 'Parts-132', and 'A/R-142'. At the bottom, there is a status bar with 'User: Summit User', 'Location: NewDB', and 'Screen #102'.

There are two ways to launch KPINet from Summit's System Module

- (1) Left click on the KPINet link on the left side of the screen.
- (2) Right click on the Open RO list, select analysis, then left click on KPINet.

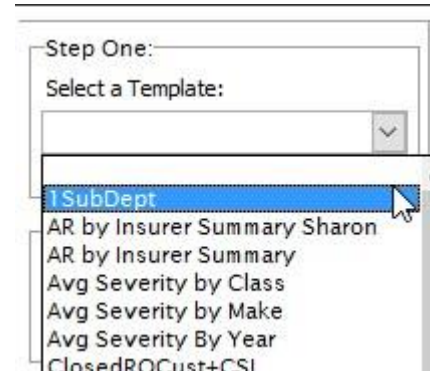
Loading your Data

Since KPINet configures automatically with your Summit Database Server (DBServer), simply follow these 4 simple steps to load the desired data into the KPINet application.

Step 1

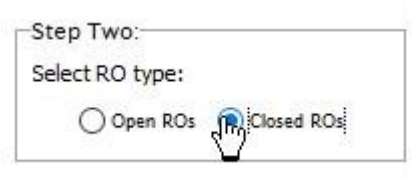
You will be provided with several templates to help you build your report.

- Left click on the dropdown arrow and select the desired template.



Step 2

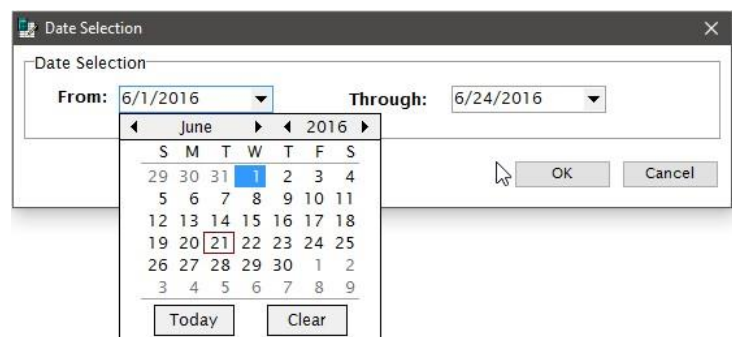
- Left click on Open RO's or Closed RO's, your report has to be based on one or the other, not both.



Step 3

NOTE: This step is for Closed RO reports only, if you selected Open RO's in step two, then skip this step.

- Left click on the underlined blue dates to open the Date Selection screen.
- Left click to select a 'From' date and a 'Through' date.
- Left click on OK.



Step 4

- Left click on Load Data.
KPINet will compile your selected information and display it for editing.

Step Four:

Load the Data into the Pivot View:

Estimator

Estimating System Insurance Company RO Month Marketing Cycle Driveable Status Loss Type CP/RO Hrs

CP/Act Hrs (Show All) Ahens Ins All State Ins. Co American Family Ins. Esumace Grinnell Select Monthly Cost Management Progressive Insurance

Units Cycle

Closed Date

12:00:00 AM

12:00:00 AM Total

Grand Total

NEWMAN, YOLANDA
Rizzo, Jill
Rizzo, Jill
SUBLET
Yolanda Newman

BRYCE GIBSON
Matt Olson
SUBLET

Drop Column Fields Here

Units	Cycle Time	Severity (Ave)	Profit
2	0	\$0.00	100%
1	0	\$356.00	-14%
10	7	\$3,091.81	67%
2	4	\$1,150.46	50%
1	10	\$5,461.49	63%
5	3	\$1,350.31	93%
1	0	\$0.00	100%
7	2	\$1,013.79	83%
29	4	\$1,823.61	75%
2	8	\$3,408.50	82%
1	10	\$10,887.27	100%
1	0	\$0.00	100%
4	7	\$4,426.07	91%
33	4	\$2,139.06	77%

Editing Your Data

The following information is **essential to understanding** how to create custom reports.

The screenshot shows the 'Estimator' software interface. At the top, there are several filter dropdown menus: 'Estimating System', 'Insurance Company', 'RO Month', 'Marketing Cycle', 'Driveable Status', 'Loss Type', and 'CP/RO Hrs'. Below these is a 'Drop Column Fields Here' area. The main report area is divided into two columns. The left column lists estimators and their associated data, including 'Closed Date', 'Estimator', and 'Total'. The right column is a table with columns for 'Units', 'Cycle Time (T)', 'Severity (Avg)', and 'Profit'. The table shows a 'Grand Total' row at the top and several rows of data for individual estimators. Callouts are placed as follows: '1' points to the 'Estimating System' dropdown; '2A' points to the 'Units' column header; '2B' points to the 'Drop Column Fields Here' area; '3A' points to the 'Insurance Company' dropdown; '3B' points to the estimator list; '4A' points to the 'Severity (Avg)' column header; and '4B' points to the 'Profit' column header.

Units	Cycle Time (T)	Severity (Avg)	Profit
2	0	\$0.00	100%
1	0	\$356.00	-14%
10	7	\$3,091.81	67%
2	4	\$1,150.46	50%
1	10	\$5,461.49	63%
5	3	\$1,350.31	93%
1	0	\$0.00	100%
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1	10	\$10,887.27	100%
1	0	\$0.00	100%
4	7	\$4,426.07	91%
33	4	\$2,139.06	77%

Area's

(1) Filter Area

Think of this as your storage area. Here you can add all the fields necessary for your report.

(2) Data Area

This includes the information your report will produce. Add the fields here **(2A)**, and they will show up in the report here **(2B)**.

(3) Row Area

This area makes up the rows of your report, you can sort the report by fields placed here. Add the fields here **(3A)**, and they will show up in the report here **(3B)**.

(4) Column Area

Here you can add additional columns for your report. Add the fields here (4A), and they will show up in the report here (4B). **Adding Fields**

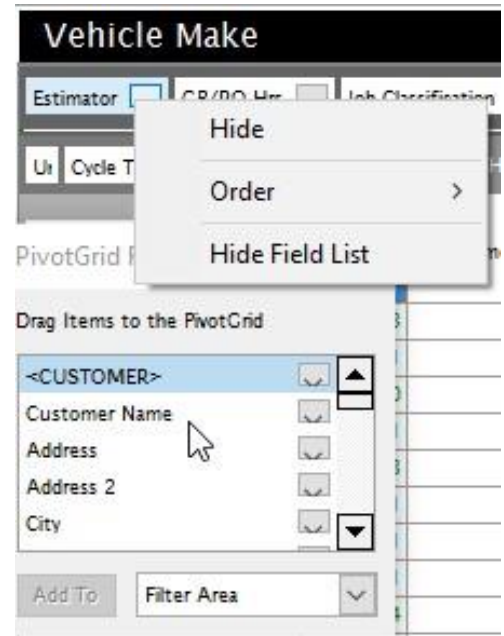
To add additional fields to your report:

- Right click on an existing field
- Left click on Show Field List

This will display the PivotGrid Field List:

- Left click on the desired field
- Left click on the dropdown arrow and choose the area to add the field
- Left click on Add To

TIP: Fields that you would no longer like to view in the 'filter' area can be moved BACK to the 'Field List' by right clicking on the Field and choosing 'Hide.'



Field List

The following is a list of fields you can add to any report:

Vehicle (cont.)

Customer • VIN

- Address • Paint Code
- Address2 • Mileage In
- City • Mileage Out
- State • Prod Date
- Zip • License #
- Phone # • Options
- Cellular #
-
-

- Work Phone Rental Car Company
- Deductible • Rental Car Co.
Email • Rental Car Email
CSI • Fleet

Vehicle Insurance Company

- Year • Ins. Code
- Make • Ins. Contact • Model • Contact
- Style • Ins. Address
- Color • Ins. Address 2
- Hat • Ins. City

Insurance Company (cont.)

- Ins. State
- Ins. Zip
- Ins. Phone #
- Ins. Phone #2
- Ins. Email
- Claim #
- Policy #
- Date of Loss

Repair Order

- RO #
- Est #
- CSR
- Estimating System
- Accuracy
- EMS File #
- Assignment Status
- Voided
- Non-Drivable
- Lost Business Reason
- Total Loss

Marketing

- Marketing Source
- Referral Source

Accounts Receivable

- Balance Due
- Amount Paid

Production

- Vehicle Status
Sub Department
Target Date Changes
- Job Classification
- Cycle Time (Avg) • PCE-RO (Avg)
- PCE-Actual (Avg)
- Priority
- Misc. Notes
- Warning Flag Notes
- Warning Flag Notes 2

Parts and Sublets

- OEM % (Avg)
- AM % (Avg)

Parts and Sublets (cont)

- LKQ % (Avg)
- # Images (Ttl)
- # Images (Avg)
- # PO's (Ttl)
- # PO's (Avg)
- # Parts (Ttl)
- # Parts (Avg)
- Supplement Imported

- # Sups (Ttl)
- # Sups (Avg)
- # Sublets (Ttl)
- # Sublets (Avg)
- # Parts On Order (Ttl)
- # Parts On Order (Avg)
- # Parts Rec'd (Ttl)
- # Parts Rec'd (Avg)
- # Parts Back Ordered (Ttl)
- # Parts Back Ordered (Avg)
- # Credit Returns (Ttl)
- # Credit Returns (Avg)
- # OCR (Ttl)
- # OCR (Avg)
- # Late Parts (Ttl)
- # Late Parts (Avg)
- # To Be Ordered

Labor and Techs

- Throughput (Ttl)
- Throughput (Avg)
- Tech-Body
- Tech-Refinish
- Tech-Mechanical
- Tech-Frame
- Tech-Structural
- Tech-Detail
- Tech-Glass
- Tech-Electrical
- Total Hours
- Total clocked Hours
- Hours-Body
- Hours-Refinish
- Hours-Mechanical
- Hours-Frame
- Hours-Structural
- Hours-Glass
- Hours-Detail
- Hours-Electrical

Dates

- Parts Ordered
- Parts Needed
- OP Date
- Sched Out
- Sched In
- RO Date
- Est Date
- Closed Date
- Closed Month
- Vehicle Drop Off Date
- Vehicle Delivery Date
- Repairs Start Date
- Ins. Authorization Date
- Thank-you Date
- Follow Up #2
- Follow Up #1
- Customer Authorization
- Vehicle Ready
- Estimate Appt
- Estimate Contact
- Assignment Date
- Export Date
- Custom Date 1 • Custom Date 2 • Custom Date 3
- Custom Date 4

Sales and Costs

- Sales Total (w/Tax)
- Severity (Ttl)
- Total Costs
- Sales-New Parts
- Cost-New Parts
- Sales-Labor (Electrical)
- Cost-Labor (Electrical)
- Sales-Labor (Detail)
- Cost-Labor (Detail)
- Sales-Labor (Body)
- Cost-Labor (Body)
- Sales-Labor (Refinish)

- Cost-Labor (Refinish)
- Sales-Labor (Glass)
- Cost-Labor (Glass)
- Sales-Labor (Frame)
- Cost-Labor (Frame)

Sales and Costs (cont.)

- Sales-Labor (Structural)
- Cost-Labor (Structural)
- Sales-Labor (Mechanical)
- Cost-Labor (Mechanical)

- Sales-Paint Materials
- Cost-Paint Materials
- Sales-Haz Waste Removal
- Cost-Haz Waste Removal
- Sales-Shop Supplies
- Cost-Shop Supplies
- Sales-Towing
- Cost-Towing
- Sales-Sublet • Cost-Sublet
- Sales-Misc.

- Cost-Misc.
- Sales-Parts Used
- Cost-Parts Used
- Sales-Parts Aftermarket
- Cost-Parts Aftermarket
- Sales-Parts Recorded
- Cost-Parts Recorded
- Sales-Parts Remanufactured
- Cost-Parts Remanufactured
- Sales-Parts Re-chromed
- Cost-Parts Re-chromed
- Sales-Storage
- Cost-Storage
- Sales-Custom
- Cost-Custom

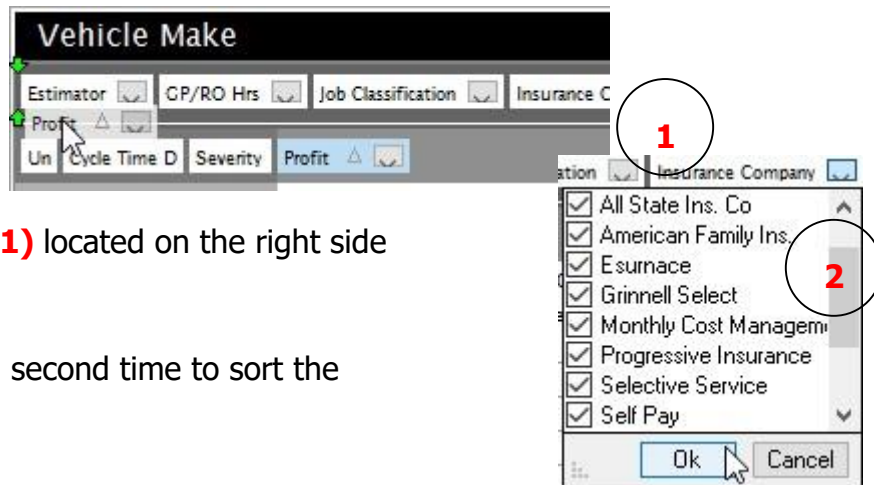
Rates

- Rate-Body
- Rate-Refinish
- Rate-Frame
- Rate-Mechanical
- Rate-Glass
- Rate-Structural
- Rate-Detail
- Rate-Electrical
- Rate-Paint
- Rate-Paint Cap
- Rate-Haz Waste
- Tax 1%
- Tax 2%
- Tax 3%

Organizing Data

Sort

You can sort your report by any field located in the Row Area by:



- Left click on the arrow (1) located on the right side of the desired field.
- Left click on the arrow a second time to sort the opposite direction.

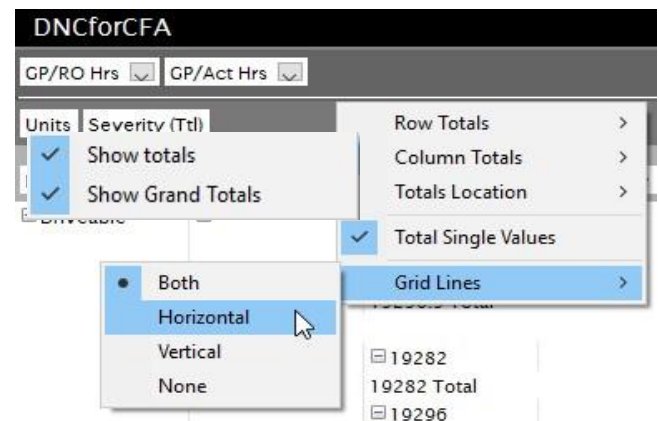
Filter

- Left click on the dropdown arrow and then left click on the check mark boxes (2) to filter certain information.

Drag and Drop

You can change the order of the fields by:

- Left click on a field and dragging it to the desired location.



Right Click Menu

Right click on the margins to access this menu.

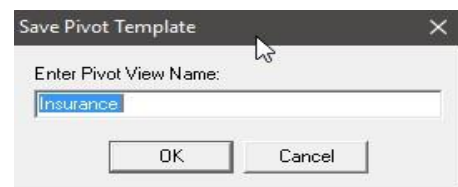
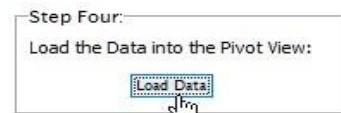
Through this menu you can change the look and feel of your report by showing totals and by adding grid lines.

Saving Your Data

Once your report is configured and organized the way you like it you can save, remove, or export the report.

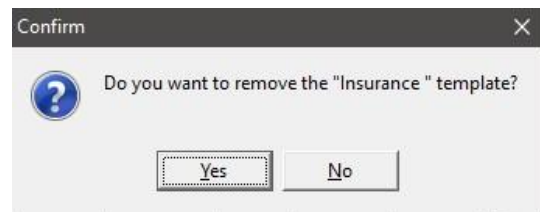
Save

The save option will add the template to the template dropdown list.



Remove

The remove option will remove the template from the template dropdown list.



Export/Print

The export option will export your report to excel, which gives you the ability to print your report through excel in any format you choose.

NOTE: There is no printing in KPINet, to finalize and print your report, you will need to export to excel.

