



SummitCRS Release Notes

8.5.2.1

Version 8.5.2.1

1. Corrected Parts 132 view report "Backordered Parts by Vendor" to increased to 7 characters for RO# field.

Version 8.5.2.0

1. Corrected IOU creation for Warranty Repair Orders, IOU will now appear on the Warranty RO.

Version 8.5.1.9

1. Internet Sales Tax Calculation business rule now attaches custom form 11 to invoice generation window.

Version 8.5.1.6

1. Parts-132 View has new "N/A" column which represents the # of parts with no part status.
2. 702 - Appointments - Now has "RO" button to convert appointment into an Open Repair Order
3. 300 - Estimate/Repair Order - New "Sup" button allows for easier manual supplement entry.
 - a. Select line to add supplement to and then click "Sup" button, enter supplement changes and click check mark to complete.
 - b. Click "Sup" button and then press the "+" button to add a new line for the supplement.
4. 132 - Parts View - New "This Week Only" check box will filter Parts view for jobs scheduled out in the current week.

Version 8.5.1.3

1. Corrected RDATE error when transferring RO to another location.
2. Adjusted Mitchell EMS import for Mitchell Connect to capture Customer Name.

Version 8.5.07

1. Removed Not Assigned department status from WIP filter.
2. Cell Phone and Email Field are REQUIRED for opening RO. A value must be entered to proceed.

Version 8.5.0.5

1. Resolved Production View Department Order
2. RO Roster \$ updated to include Job Totals

Version 8.5.0.4

1. Email and Cell Phone Field added to Open RO Screen

Version 8.5.0.2

1. Added field - Repair Type to Job->Admin screen 204. Presets for repair types are added in the Admin Module in Other->Presets->Repair Types
2. Business Rule #75 to require RO has repair type before closing.
3. Added Parts Returns under Jobs Popup Menu->Analysis->Parts Returns

Version 8.5.0.0

1. Database changes required db_DeptDates - 8 new fields: OIn, OOut, OActualIn, OActualOut, PIn, POut, PActualIn, PActualOut.

Version 8.2.1.5

1. Status Update Text will now offer option of using Scheduled Out date OR Target Out (Original Promise Date) This is accessed using the "Quick Contact" screen.
2. If Vehicle is moved BACKWARD into a department with an associated date that has already been set - if the date is different than today it will prompt whether to use the old date or the current date.
3. DNA can now be launched directly from Summit in System Module|Analysis|DNA. DNA must be installed in AppPath\DNA\DNA.exe

Version 8.2.1.4

1. Business Rule #75 now activates Rental Car Co Email label in Screen 204 Jobs|Admin|General to change from "Rental Car Co Email" to "CEI Claim #"

Version 8.2.1.3

1. 0345-Delivered Report: Shows vehicles delivered whether open or closed within selected date range.
2. Changed System > Admin descriptions from "Customer Target" to "**Original Promise**", Shop Target to "**Scheduled In**" and "Actual Pickup" to "**Delivered**"
3. Added "Pre-Delivery/Close" option to the "Compliance Task List" button on System Module.
4. Job History is updated when a user selects to run the Pre-Delivery/Pre-Close Audit.

Version 8.2.1.2

1. Enabled Engage Messaging Platform Integration.
2. Follow Up Dates 1 & 2 now able to be added to RO List
3. Corrected "Summit Remote" Link on login screen.
4. Business Works Payments - distribution account (typically 1) can be set manually per workstation by modifying Summit.ini [ACCTG] BWDistAcct = 1 (Default is 1)

Version 8.2.1.1

1. Business Works Update: payments now apply to correct invoice not the oldest invoice for customer.
2. Business Works Update: Non-Cash payments will now export as Check for easier manipulation in Business Works.

Version 8.2.0.8

1. Included Integration for Outlook 365 Desktop, Users will need emailer.exe instead of qmapi.exe

Version 8.2.0.6

1. Engage Beta Testing Enabled

Version 8.2.0.4

1. Hide Customer Data option now hides email address on Job Cover Sheet.

Version 8.2.0.3

1. Added "Hide Customer Data" option for RO Pack and Job Worksheet.

Version 8.2.0.2

1. Corrected Estimate Import Issue

Version 8.2.0.1

1. Corrected issue with Q-Scheduler Export RO from Summit

Version 8.2.0.0

1. Text Service tab added to Administration Module for Engage Integration.
2. Changed Login splash screen to new SummitCRS logo.
3. Facebook link added to login screen

Version 8.1.7.5

1. Accounting Module - Receipts - Ref# column points to correct field.
2. Job History - Maximizing or sizing window now expands the Notes column to fit.
3. Added blank first page to Technician Bank report to avoid data cutoff.
4. Betterment was being removed during sync corrected for CCC and Audatex.
5. Cell Phone # is now imported as FIRST phone # in Audatex, CCC and Mitchell.
6. Report 095a and 095b Sold #s now ONLY count closed ROs.
7. Report 096a and 096b Sold #s now exclude Lost Business and Voided ROs.
8. Parts Management - Markup Line Item Cost read only error resolved
9. Parts Management - Receiving Invoices or manual invoice will now automatically calculate tax for Canadian provinces.
10. Engage Platform Integration
11. Report 098 Corrected invalid data error.
12. Report 063 Tech Bank Report has been optimized for speed.
13. Transfer images and Video is now an option when transferring ROs from one location to another. (requires additional software)
14. Transfer RO now creates a new job history note showing the transferring location and user name.
15. Changed Tax Calculator default web address.
16. Added Parts Notes Field to Parts Tab 50 characters limit.

Version 8.1.7.4

1. Added confirmation to Podium integration.

Version 8.1.7.3

1. Corrected Batch Payment process

Version 8.1.7.2

1. Podium Integration Completed. (requires PODEX.exe)

Version 8.1.7.1

1. Corrected Technician Bank Report sort that was putting non flagged ROs on separate pages.

Version 8.1.7.0

- 1) Added "Export" to Closed RO List to Excel

Version 8.1.6.9

- 1) Added "Suppress" option for Invoice \$ printing.

Version 8.1.6.8

- 1) Corrected QBExport for Multi Cost Center Invoices.

Version 8.1.6.7

- 1) Corrected index out of bounds error with QBExport of AP Multi Cost Centers

Version 8.1.6.6

- 1) Added second sort on Technician Bank Report – RO#
- 2) Changed QB Export of AP to include more than 2 cost centers per transaction.

Version 8.1.6.5

- 1) Added Contact can now be edited in Vendor List Phonebook

2) Adjusted Go List font size.

Version 8.1.6.4

- 1) Added Notes section to "Go List" report. This allows use to hand write in their own notes.
- 2) Added Satellite to RO Header bar and is available for RO List View.
- 3) The following fields are available for RO List View: Satellite (mediaset) and Notes (freetext)

Version 8.1.6.3

- 1) Added New Report - Undeposited Funds To A/R history

Version 8.1.6.2

- 1) Technician Filter added Print option to the RO List view reports.
- 2) Edited Report RO List View – "Open RO List" added "Estimator"
- 3) New Report RO List View - "Go List". (List of vehicles scheduled out for TODAY)

Version 8.1.6.1

- 1) Debug Feature – when calculating in Line Items system now checks to see if table state is read only.
- 2) Corrected estimate sync exception that could keep the RO List disabled and not able to move cursor.

Version 8.1.6.0

- Corrected Parts Tab overlap in headers.
- Corrected Batch Payments not applying on some RO's

Version 8.1.5.9

- ICBC Insurance EMS import resolved A list items importing admin data

Version 8.1.5.8

- Close and Pre-Close procedures will now pop a Department Cycle Date review with business rule 75 enabled.
- Shop Pay Items will now validate flag labor hours on close.
- Added CDN Carriers Virgin Mobile and Koodo Mobile for SMS messaging.

Version 8.1.5.7

- Corrected Windows 10 scrolling during Sync.
- Phonebook will no longer allow adding Vendors/Insurance Companies with blank code.
- Changed Next PO logic in Parts Tab, Summit will now look for the lowest possible PO number instead of generating next highest.
- Saskatchewan - PST changed to 6.0%
- Warranty and Duplicate Jobs creation will now prompt for JOB NOTES which will appear in the Job Header for the new job.
- Parts Database now shows Code - items may be "coded" for easier identification.
- Quick Parts Add (Line Items) now shows Parts Code and may be searched by Part Code.
- Corrected Vendor list not changing when locations changed. (MSO)
- Corrected Custom Accounts not changing when locations changed. (MSO)
- Modified shortcut Ctrl-I to launch MediaPoint instead of the media tab.
- RO Creation users can again select which production dept. to start the RO in.
- MTD Sales/Goals in production view now reflects estimator, CSR, etc. sales when filtered
- BATCH AR Payment posting is enabled.
- Line Items, if ADJ LIST is less than EST LIST then the ADJ List will turn Orange in the supplement tab and the Retail box will turn Orange in the Line Items.

Version 8.1.5.6

- 1) Credit Memos not updating credit received mark properly for Closed ROs.
- 2) Photo Manager - no longer zooms on click. + and - signs added for zooming purposes.
- 3) Added Email address to Phonebook: Insurance Company Edit.
- 4) PhoneBook: Insurance Code is no longer editable.
- 5) Added "DaysLeft" field - show days count from TODAY to SCHEDULED OUT.
- 6) Added "SITT" field - show Static Touch Time from Scheduled In to Scheduled Out.

Version 8.1.5.5

- 1) Changed global hot keys:
 - Ctrl-S : Advanced Search
 - Ctrl-P : RO Pack
 - Ctrl-R : Quick Repair Order
 - Ctrl-I : Media Point (Images)
 - Ctrl-N : Job Notes/History
- 2) Changed RO Conversion to allow quick type selection from drop downs.
- 3) Removed Job Department drop down. Will now automatically select 1st department upon RO creation.
- 4) Change Reasons can now be selected with the keyboard - no mouse interaction required.
- 5) SummitLiveUpdate terminates Das,MediaPoint,ReportPro and Summit prior to upgrade
- 6) Corrected issue with Returned Parts not able to change status.
- 7) Job Header can now be resized and saves settings.
- 8) Expanded Notes now automatically refresh every 5 seconds. Other users of Summit can enter notes and they will automatically appear on other workstations on the Same RO.
- 9) Parts cannot be added, changed or Transfer Costs in a Closed RO.
- 10) Sync is not allowed on Closed ROs.

Version 8.1.5.4

- 1) Corrected formatting for Tax Rates to support precision points, ie; 6.275%.
- 2) Parts that were marked as received that are changed to credit can no longer go back to on order.
- 3) Moving RO to Lost Business is not allowed if payments have been received on the job.
- 4) Disabled Editing of User and date/time stamps in Expanded Notes

Version 8.1.5.3

- 1) Add Claim # field to Scheduled In List (700)
- 2) Added F5 integration for MSOs.
- 3) Added ability to set workstation goals for monthly sales.
- 4) Corrected Production screen grid formatting.
- 5) Change customer ID by right-clicking on customer name select 'Update Customer ID'

Version 8.1.5.2

- 1) Job History should sort most recent at bottom.
- 2) Admin Module - Job Class Goals may now be set by day for use with F5.
- 3) Admin Module - Production Departments set screen has been expanded to view ALL departments at a glance.
- 4) Global Search is now integrated into Summit (Single Server)
- 5) System Module - Job Status (Department) in header allows sub-department to be changed.

Version 8.1.5.1

- 1) Facebook Link (for Status OnDemand) can now be set in Admin Module|Media Paths
- 2) Status OnDemand WebAddress may now be set in Admin Module|Company

3) Added "Status OnDemand Portal Link" to the QuickContact form in System Module.

Version 8.1.5.0

- 1) Changed Advanced Search Shortcut to CTRL-ALT-S
- 2) Corrected Part Types updating for MSO's with inconsistent custom accounts
- 3) Corrected Legacy Report 094a and 094b Calculations for RPR and RPL %
- 4) Added keyboard shortcut reminder note in Advanced Search Header.
- 5) Corrected Warranty RO notes to be added properly.
- 6) Summit Logout/Close now terminates Summit.exe, Mediapoint.exe, & DAS.exe to increase system performance.

Version 8.1.4.9

- 1) Added CSR to RO Header Bar, resize the header to reveal new fields.
- 2) Added link to Quick Contact when clicking on Customer Name in RO Header Bar
- 3) Added Tax% to Job Cost Analysis Screen (503) Job Summary.
- 4) Enhanced Summit Logout to run closing .bat files

Version 8.1.4.8

- 1) Tax Refinish Error when Selecting Rates in Admin section of System Module corrected.

Version 8.1.4.7

- 1) Corrected Legacy - 063 Technician Bank Report crashing on larger databases...
- 2) Clicking on Priority in Production View now automatically highlights the current priority for easier editing.
- 3) Production Priority - you may now press ENTER after selecting priority for Auto-Save.

Version 8.1.4.6

- 1) Corrected Legacy Report 063 Technician Bank Report "jumbling"

Version 8.1.4.5

- 1) Photo Manager - right click or left click to increase and decrease thumbnail size.
- 2) Added Insurance Company to Parts Order and Purchase Order - (Assured)
- 3) Corrected Graphs - was not respecting '# of Points to Display'
- 4) 1st pass - Linux Server Test - Admin Module Complete.
- 5) Clicking on "Image" link will now update image count - previously only clicking on Media would update.
- 6) Creating New Vendors was allowing a blank code by pressing the space bar. Corrected.
- 7) Advanced Search Feature - now supports jumping to Assignments, Estimates, Voided and Lost Business as well as Closed.
- 8) Original Promise Date tag (Custom Forms) was causing an error.
- 9) Shop Rates now transfer when a Duplicate RO is created.
- 10) TimeClock Status button is now visible from Job Cost screen.
- 11) Removed all Drop Shadows from Summit.
- 12) AR Screen 142 can now Export to Excel. "Export" option has been added next to "Print" option.
- 13) Enabled Line Item Discounts option in Import screen
- 14) Credit Returns that have been received will now display the status "Credit Return" in Green for easier identification.

Version 8.1.4.4

- 1) Added MoPho Barcode to Vehicle ID Sheet (Unit)
- 2) Took Estimate ID off of Vehicle ID Sheet (Unit) to make room for Barcode.
- 3) Changed caption "Cellular" in Admin screen (200)
- 4) Added Profit % column to Closed RO grid.

Version 8.1.4.3

- 1) Report 0251 - WIP Labor Balance (Actual) was calculating flagged hours instead of timesheet hours.
- 2) Convert to RO - is now forced into Data Edit mode to eliminate potential "Dataset Not in Edit Mode" errors.
- 3) TechCentral was not updating Sub Departments when moving vehicles on Clock In.

Version 8.1.4.2

- 1) Images for Photo Manager are now reset when switching between repair orders.
- 2) Job History Notes - AM and PM marks were inconsistent - some at front some at end.
- 3) "Final Invoice" report switched to "Invoice"
- 4) Production Dates now update when a department is selected on RO Creation.
- 5) Merge Files was causing an error Tbl_MergeAdmin field "PaintCode" not found.
- 6) Timeclock - now supports reconnection for long idle times. Example: Leaving TC on overnight unattended.

Version 8.1.4.1

- 1) Vendor Invoice would not allow changing of invoice amount when editing - would force a change to the original invoice #.

Version 8.1.4.0

- 1) Credit Memo - Added Name, Signature and Date line at the bottom...

Version 8.1.3.9

- 1) Quick Search Function was changed so that if the RO is being searched it does an exact match and not a partial match. This was previously resulting in a Warranty RO being found prior to the original RO.
- 2) Searching within Grids was changed so that RO searches are now for exact matches which allows for warranty ROs.

Version 8.1.3.8

- 1) Removed Warning Flag on "Dup" option - duplicating of RO.
- 2) Merging Files - if option to replace original vehicle with new was selecting the original paint code was being used.
- 3) SK only - if Duplicate file is being created it was using the tax rates from the original job.

Version 8.1.3.7

- 1) Added 2 additional fields for interoffice email recipients.
- 2) Added the ability to CC a reply to interoffice mail.
- 3) Messages related to Closed ROs can now be saved into the Expanded Notes for that RO.
- 4) Removed Character Limit on Interoffice Messages.

Version 8.1.3.6

- 1) Job Worksheet was printing line items out of order intermittently when printing with RO Pack.
- 2) When software is expiring or has expired it now says - contact technical support for an extension code.
- 3) Report 095a and 096a were reporting incorrectly IF estimator information was mixed case for different entries.
This build now converts the data (for the report only) to uppercase.
- 4) Advanced Search may now be activated by pressing Ctrl-S
- 5) Advanced Search now has new JUMP TO CLOSED RO feature. Right click on any closed RO in the list and quickly jump to that RO in the Closed RO List.

Version 8.1.3.5

- 1) Posting Credits in Closed then immediately posting Credits for Open in Parts was causing a "Read Only" error.
- 2) Synchronize - Mitchell Estimates were removing Betterments on Sync. This was corrected.

Version 8.1.3.4

- 1) AdjustRite - Business Rule #75 enabled will show "AdjustRite" instead of "Audatex" in Import Screen.
- 2) AutoCalc option in Line Items now saves defaults (per workstation)

Version 8.1.3.3

- 1) Shop Supplies no longer is removed when file is sync'd.
- 2) VIN in Admin screen now requires click rather than hover over it.
- 3) Changed PING option to do a 'Select 1' query instead of a PING.

Version 8.1.3.2

- 1) Added SMS option to Advanced Search in System Module.
- 2) Photo Manager - can now "ADD ALL TO LIST".
- 3) Added Satellite Locations to Lookup Table - Presets - in Admin Module (db_CanMsg)
- 4) Satellite Locations now store 10 as the Category Code - mapped to field: MediaSet (no longer in use)
- 5) Added Total Hours to TimeClock Job Status Screen (from System Module)
- 6) Made adjustment to TouchTime calc in RO List View - ensure stops calculating if Arrival and Delivery Dates are set.

Version 8.1.3.1

- 1) Job Cost Analysis 503 screen was not showing Gross Profit Goal (based on Job Class) IF production view was default login view AND RO List view was not selected prior to viewing screen 503.
- 2) Line Items - Pay by items may now be "Excluded" in View. Previously you could view Pay by items by selecting the option, i.e.; Customer Pay, etc. Now you can view all BUT Customer Pay by clicking on "Exclude"
- 3) Technician Bank Report - 063 - Technician Codes longer than 5 characters were not reporting properly...

Version 8.1.3.0

Scanner issue fixed

Version 8.1.2.9

- 1) Fixed issue with Tech filter not showing the list of Techs
- 2) Fixed the birthday greeting so the graphic shows

Version 8.1.2.8

- 1) Error on login

Version 8.1.2.7

- 1) Added Ping to System module and TechCentral module. If "PING" is passed as the first parameter then the timer will ping the server every 3 seconds... Also - login screen will show "Ping" icon next to location if enabled.
- 2) Support website links on Login screen and in Modules now points to SummitCRS.net rather than Suteg.net
- 3) Remote Session link on Login screen now points to SummitCRS.net.
- 4) Added support for parts invoices > \$20000.00 - previously was limited to \$20000. Now supports invoices up to \$999999.

- 5) Messages can now be sorted by clicking on desired column heading.
- 6) Closed RO Parts List was showing Estimate # in the RO # column - Closed ROs/Parts View/Print.
- 7) Corrected Error when attempting to print QC Checklist - from Production view or TechCentral.
- 8) Added ability to drag vehicles in production to N/A dept. (Basically NO STATUS)
- 9) RO List View - Department was only sorting one direction. Corrected.
- 10) "Show Customer Info" option on Job Worksheet now defaults to On for USA and OFF for Canada.
- 11) Production view no longer shows up when logging in with ASCENT client.
- 12) Changed Convert to RO screen - eliminated "Tbl_JobClassSchedule" - Cannot Perform this operation on a closed dataset error with ASCENT.
- 13) Changed CDR calculation - End Date stops if vehicle has been delivered. This also affects TouchTime calculation.
- 14) Corrected Error Loading Job Class Workload on screen 703 - System Module.
- 15) DAS (Document Scanner) now supports file paths with spaces in them.

Version 8.1.2.6

- 1) Report 0610 was Showing RO #0. I added a filter to keep them from showing...
- 2) Estimate list will no longer show estimates with estimate #0.
- 3) Job Costs are now calculated for immediate availability on WIP Cost reports upon leaving the Parts screen. (previously job costs had to be verified in "500" prior to availability on WIP Cost reports)
- 4) PO report was not selecting the correct Email Address for the Vendor selected. Was using last vendor email address used instead.
- 5) Corrected Error: DBText2: field License not found. When adding a new timesheet. This error was intermittent and would only occur if attempted after Converting an RO.
- 6) Corrected Report 0920 and 0921 sorting incorrectly...

Version 8.1.2.5

- 1) Shop Pay report 097a and 097b no longer include supplement labor hours as part of hours' calculation. If the sup hours were NULL it was showing the totals as ZERO on the report thus causing it to be incorrect.
- 2) Clicking on the 'Department/Status' column in Open RO List View will now sort by 1) Dept then 2) RO #

Version 8.1.2.4

- 1) When logging in there was an error "list index out of bounds" - possibly connected to Locations List. I was setting the index to 0. Now it is only set to zero if the locations list is visible (more than one location available to logged in user).
- 2) Added "DC" column in AR List View to allow sorting of Departments by Production sequence.
- 3) Removed "AutoSort" feature in line items.

Version 8.1.2.3

- 1) AcctDir variable on Login screen not being initially set. Set when switching between remote locations (via location screen, ie; AcctPath field)

Version 8.1.2.2

- 1) Gross Profit was calculating % instead of \$ on Reports 091 and 091a.
- 2) Job Cost Analysis (503) was not including Prep clocked hours in Refinish Actual Hours.

Version 8.1.2.1

- 1) Corrected issue with Transfer Cost in Parts screen for databases with primary key > 1 billion.
- 2) Changed default sort order in Messages to NEWEST messages first.
- 3) Sorting recipients in Messages by name.
- 4) Added Scan Payment option to Receive Payment Screen.

- 5) Integrated SSC scanning into Summit.
- 6) Convert to RO was randomly not showing hours per day properly from Insurance Company List.
- 7) Changed default order of AR Payments and AR Payment notes too NEWEST first.
- 8) Global Timesheet Editor - clicking on Tech Column now sorts by Tech, Date and Start Time.
- 9) Report 070 - Now sorts by Closed Date, then RO #
- 10) Report 071 - was showing "future" payments made after ending date.
- 11) Report 074 - Now sorts by Insurance Company, then Closed Date.
- 12) Removed MediaPoint Cloud references

Version 8.1.2.0

- 1) Made SummitLiveUpdate options screen use larger font for easier reading and changed "View Release Notes" to "What's Included in the New Version?".
- 2) AutoFlagging was taking a long time on Large Databases...

Version 8.1.1.9

- 1) QBClass was not being reset properly when switching locations IF data was hosted on separate servers.
- 2) Set Tbl_Costs Strict_Mode = False to eliminate non-critical data issues with updates.
- 3) Global Timesheet Editor now has its own button in TimeSheets. Edit and New in Timesheets now open default editor.
- 4) Ping Timer re-implemented - every 60 seconds.
- 5) AR Grid and Closed Grid - now mirror RO List Grid for font settings...
- 6) Image Count (# of Images) now includes sub-categories.
- 7) Synchronizing an estimate was removing Paint Materials.
- 8) PeachTree AR Payment (Receipts) Export phase 1 complete.

Version 8.1.1.8

- 1) Production Notes - showing - not actual notes. Corrected.
- 2) Server Selection Screen - made smaller to work with smaller screens.
- 3) Business Rules - not displaying on the screen properly - showing "Primary Key" as field.
- 4) MediaPoint was not launching properly in TechCentral...

Version 8.1.1.7

- 1) Corrected issue with Department Scheduling turned on - causing error in Convert to RO screen. (Parkway Collision)

Version 8.1.1.6

- 1) Timeclock - Job Worksheet now sorts by Line #
- 2) Timeclock - RO List is now sorted by RO #
- 3) Timeclock - Technician list is now sorted by Tech Name
- 4) Timeclock - Business Rule # 73 now allows Tech to select a production department in addition to the labor category.

This will allow tracking of Production Department Efficiency.

- 5) Job Costs - Timesheets (502) shows Production department related to Timesheet cost.
- 6) Timesheet edit - allows selection of Production department.
- 7) Report 083 - corrected issue. (Legacy)
- 8) Added to System Module - Ping Timer - which pings the server once a minute in order to keep connections alive...
- 9) Screen 500 and 501 - added Notes column.
- 10) Corrected Date format issue with "Late Parts - Vendor" report.
- 11) Strict Mode - changed tbl_IOU, tbl_Lines, tbl_Detail

- 12) Implemented DIAZ integration
- 13) Removed QB Class Popup - now reads from Summit.ini file to get value... [ACCTG] ShowQBClass
- 14) Policy field was included in SQLFields but not in the Tbl_Names Tfields list. Added to TFields.
- 15) "Presets" are now sorted by description when used throughout Summit.
- 16) Creating a New Estimate - Contacts list is now sorted by Name.
- 17) Screen 703 - was not calculating EL,DL hours as part of the equation for spreading workload.
- 18) Business Rule #25 was not operating properly - Target Date Change without Reason.
- 19) Convert to RO - Drivable or Non-drivable is now required field - no default.
- 20) Screen 703 - changed caption of combo box "All Estimators" to "All Office Staff" to include all office staff.
- 21) Fast Reports - Export to PDF now defaults to Embedded Fonts "OFF" - this creates a much smaller PDF file.
- 22) Mitchell Import - corrected issue with line item discounts.
- 23) Report 012 - Formatting issue corrected with Totals.
- 24) Report 070, 071 - rounding issue was corrected.
- 25) Added "Received Date" to "Parts List" report. Printed from screen: 400
- 26) Quick Message - Recipients now sort by name
- 27) Selecting Employees by Title - now sorts by Title/Name.
- 28) Screen 203: Selection of Insurance Company now supports Typing for search
- 29) Diaz PlugIn integration with Production View 112

Version 8.1.1.5

- 1) Report 071 - corrected Issue.
- 2) Report 074 - Sorts by Closed Date, RO #
- 3) Report 070 - Sorts by Closed Date, RO #
- 4) Convert to RO - Job Auto-Classify corrected.
- 5) Convert to RO - Hrs./Day from Selected Insurance Company corrected.
- 6) QB Export - now will pop up QB Class for verification on each export type, ie; AR, AP, Receipts, etc.
- 7) System Module - Company/Media Paths - Changed order of paths - Imaging is now first. Also removed unneeded references.
- 8) System Module - Media - Added Media Paths to the Media Tab. Now shows path of each media type. Media Paths will be green or red showing connectivity.
- 9) System Module - Image label on RO Header is now a direct link to MediaPoint.
- 10) System Module - MediaPaths now automatically switch when switching locations.
- 11) System Module - Job Costs/Flag Labor - Notes now show in the Grid View.

Version 8.1.1.4

- 1) Corrected Rounding Issue in Report 070 - was showing zero balances...
- 2) Corrected Report 084 - field name changed from 7.5 to 8.0 in db_Source2 from "desc" to "sdesc".
- 3) Selecting Date Range for Estimates was showing the time in the End Date field...

Version 8.1.1.3

- 1) Screen 502: Job Costs/Timesheet/Totals - was not combining technician's hours.
- 2) Added "Rental" to top of Admin Header in System Module. Note: Header must be "SIZED" to view additional data.
- 3) Corrected issue with QScheduler Export - vehicle info was combined into one field instead of year, make, model...
- 4) Line Items - now clicking on Line # will resort by line no...
- 5) Parts - Clicking on 'Status' column to sort now double sorts on Status Then Line #.
- 6) Scrubber - now sortable by clicking any column. Clicking on "Tag" column selects or de-selects all items.
- 7) TimeClock Status is now viewable in the Production View (Screen 112)
- 8) Corrected IOU screen (Accessed from RO Admin Bar at top of System Module) ability to Check off items.
- 9) Added Estimator to Scheduled In/Scheduled Out List in Screen 700/701

10) Accounting Module - Export to BW - was showing previously posted items in the Report that prints following export. This was due to a memory table not being cleared, ie; emptied after each export batch.

Version 8.1.1.2

- 1) SummitLiveUpdate implementation...
- 2) Q-Scheduler no longer Auto-Loads when exporting.
- 3) Q-Scheduler export now automatically drops invalid symbols.
- 4) Summit Remote Session can now be launched by clicking on Green Arrow on Login Screen.
- 5) Job History supports Printing by Filter, ie; Printing now supports column filters.

Version 8.1.1.1 *** MAJOR UPDATE - CORRECT POTENTIAL MAJOR BUG *******

- 1) Q-Scheduler Integration - requires Q-Scheduler 1.06. Modify QScheduler.ini
- 2) Sorting of Insurance Companies in "Create New Estimate" dialog corrected.
- 3) Sorting of Lookup Lists in Legacy Report/Print Options dialog corrected.
- 4) Sorting of Job Rates in Admin-200 Screen corrected.
- 5) Report 620 - de-selecting "Show Costs" option was causing DB to try to match report and thus removing costs related to the report.
- 6) PeachTree Export - was randomly popping up asking for CustomerID during Vendor Posting - this has been corrected.
- 7) Changed order of closing when shutting down Summit to try and eliminate exceptions when closing. Now am manually freeing forms and datamodules used by the Login form in Reverse order - also now closing all objects prior to closing the form itself and calling Application. Terminate rather than FormClose.

Version 8.1.1.0

- 1) VIN hover in Parts screen no longer pops up a message - this only happens on a CLICK event.
- 2) Timeclock - when moving vehicle with QC items to be checked - coded QC form to "STAY ON TOP" as reported by some shops that the form was being "hidden" behind other forms on the screen and would appear to "lock up" Summit.
- 3) Changed order of QMapi/QM2, etc. - Order of Operations for Email - QMAPI - business Rule. if QMAPI.exe is not on the PC then it will run QM2.exe next. This will allow a mix and match setup with QMAPI for older Outlook integration and QM2 with newer Outlook integration.
- 4) Added Graphs back into Reports tab.
- 5) Added IOU Management - Ability to Check Items - was showing as TRUE and FALSE.

Version 8.1.0.9

- 1) Last Estimate # now sorts to the top of the Estimates list - making it easier to find recently imported estimates.
- 2) You can now "hover" the mouse over VIN in Job Admin screen 201 and it will pop up a window showing the last 8 digits of the VIN #. This also works when hovering over the VIN # in Parts Screen - 400-404
- 3) Quick Print RO and Invoice were not saving "STICKY" settings...
- 4) Added the ability to change colors for grid settings related to CHD (Calculated Hours per Day, ie TOUCH TIME) and CDR - Calculated Days Remaining.
- 5) Added Q-Scheduler Integration - 1st pass. Right-Click on RO-List - Quick Menu - Send RO to Q-Scheduler.

Version 8.1.0.8

- 1) Added Library option to Dashboard - this accesses the "Library" folder in the root of each Media type. ie; c:\Media\PDF\Library
- 2) Parts Lookup in Line Items - right-click popup menu -> Add from Database: The list did not include "Group" as it did in the past. Corrected.

- 3) Parts Lookup in Line Items - was not sorting when clicking a column header.
- 4) Added Year, Make, Model and Color to AR View. Currently "Vehicle" includes all of those fields together and makes it harder for searching.
- 5) Screen 132 - Late link - Connection Not Defined... Corrected.
- 6) PhoneBook-Vendor - "Notes" link. Causing "Can't perform this operation on a closed data set. Corrected.
- 7) Job History Notes - Print not working - error "Memo4: Field Not Found "HUser".
- 8) Manual Flag Labor Either Add or Edit - Technicians not sorting properly (by name)
- 9) Tag Parts - click column header untags. Corrected.
- 10) Parts to Be Ordered Report - was showing parts on Total Loss Repair Orders. 11) Custom Totals were not showing up on Screen #503. Job Cost Analysis

Version 8.1.0.7

- 1) This version corrects tax issue in Saskatchewan and Manitoba. - Update AutoImporter as well.
- 2) AR View - Grid now saves changes made to it, i.e.; column widths, positions, etc.
- 3) MediaPoint not launching from TechCentral - "Connection not defined". - Corrected.
- 4) QM2 - new email client integration. QM2 works with newer authenticated email systems like Outlook, etc.

Version 8.1.0.6

- 1) Corrected Issue with Bank Report (063) not sorting properly.

Version 8.1.0.5

- 1) TechCentral - clicking on "Check in Parts was causing a "Connection not Defined" error.

Version 8.1.0.4

- 1) Accounting Module and Timeclock Module now support "Location Switching".

Version 8.1.0.3

- 1) Cloud Media now looks at the MDBConnection. Database rather than the Login Server Database for easy switching.
- 2) Corrected issue with Labor Credit - once you've created a Labor Credit - clicking on the line in Line Items was creating a message that stated "This line cannot be changed due to Repair Status.'
- 3) Legacy Report 012 - Total # of ROs, Grand Total and Received were showing (invalid)
 - * Requires new Reports.rav
- 4) Unable to edit part price after calculating job in line items - corrected.
- 5) Received Parts Locator not working properly - Parts View-132|Locate button.
- 6) Auto charges in Line Items was not adding labor type on Tear Down option.
- 7) Double-click on Schedule/Workload was not showing list of ROs.
- 8) If a location is switched in the System Module - it now shows that location on the LOGIN screen.
- 9) Inactive employees were showing in the employee lookup list for Appointments.
- 10) Employee lookup list for Appointments was not showing employees unless they had a login code.
- 11) Switching locations was not changing departments/job class/ and lookup data...
- ** NOTE ** may need to move PopulateCustomProfitCenters from login screen to manager and call there...
- 12) Convert to RO screen - Insurance Company list was not in correct order. Also corrected order on all other lookup combo boxes. Alphabetical.
- 13) Scheduled Out Date can now be "cleared out".
- 14) Added the ability to Close an RO from the AR View.

Version 8.1.0.2

- 1) KPINet Support Added... accessible on right-click on RO List then select Analysis->KPINet or clicking on KPINet Link in Reports Tab.
- 2) Ability to Switch Locations from the OPEN RO LIST.
- 3) Ability to sort columns in screen 500.

Version 8.1.0.1

- 1) Global Timesheet Editor was not able to sort columns. - Corrected.
- 2) Changing File Link # (link to EMS file) was not working because it was adding the file extension as well. File extension was removed.
Mitchell import file name should end with an "A". Syncing now appends the A if it isn't part of the link.
- 3) Interoffice Messaging was having issues... corrected (PrimaryKey cast incorrectly on Tbl_MsgSender object in DM1).