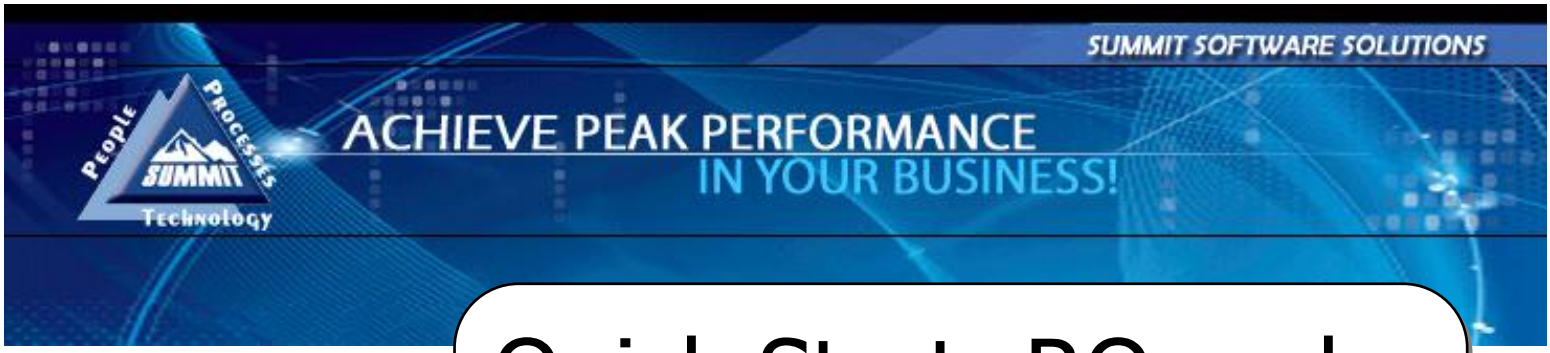



# Quick Start: RO and Parts Management

## Training And Reference Manual

© Copyright 2007. All Rights Reserved.

SUMMIT
Technical Support

# Contents


Quick Start: RO and Parts Management ..... 1

TRAINING AND REFERENCE MANUAL ..... 1

Repair Order and Parts Management Overview ..... 4

Repair Order Management ..... 5

RO View ..... 5

The RO List "Right Click" Action Items Box ..... 6

The Summit Information Bar ..... 8

Viewing the *# of Sublet* Repair Lines in a particular Repair Order: ..... 10

The Summit Job Tab Bar ..... 11

Jobs Tab ..... 11

Admin Tab ..... 11

Line Items Tab ..... 12

Line Items Tab Overview ..... 12

Parts Tab ..... 14

Ordering Parts ..... 14

Receiving Parts ..... 15

Back Ordered and Credit Returned Parts ..... 15

Print the Parts Labels ..... 16

Print the Parts Status and Parts List Reports ..... 16

Job Costs Tab ..... 17

Enter Vendor Costs Manually ..... 17

Manually Flagging Flat Rate or Commission Labor Costs ..... 17

Costing Paint Materials, Hazardous Waste, and Shop Supplies ..... 18

Job Costs Analysis Tab ..... 18

Analysis Views: ..... 19

Pre-Close Checklist ..... 19

Date Range Filtering ..... 19

Quick Launch Buttons ..... 20

Jump ..... 20

Voice Recording ..... 21

Macros ..... 21

To RECORD a Macro ..... 22

To PLAY/RUN a Macro ..... 22

Email/Interoffice Mail ..... 23

Dashboard ..... 23

Phonebook ..... 23

Quick Contact ..... 24
IOU ..... 24
Schedule an Appointment ..... 24
Compliance Tasklist ..... 25
Job History/Notes ..... 25
RO List Icons ..... 26
Grids Fonts and Color Controls ..... 26
Duplicate Estimate ..... 26
Importing an Estimate ..... 27
Synchronize an Estimate ..... 27
Warranty ..... 28
Part Price Changes ..... 28
Print RO List ..... 28
The Summit Parts View ..... 29
Overview ..... 29
Parts View Icons ..... 30
Locate ..... 30
Late Parts ..... 30
IOU's ..... 30
Print ..... 31
Reports Options ..... 31
Reports Tab ..... 31

# Repair Order and Parts Management Overview

This guide will help you:

- Improve knowledge of Repair Order Processing and Parts Management with the Summit management software.
- Improve knowledge of Summit's navigation and information management / distribution within these modules.
- Discuss how the Administration and Setup Module affects RO processing and parts management.
- Show how to reduce RO processing time.
- Show how to improve parts management efficiencies.
- Improve overall use of the system.

**Repair Order Management:** Beginning with the automated RO Creation Date, through, and including, the posting of sales and costs to your financial management system – the RO management function in Summit is the key to your management and control success.

**Parts Management and Control:** Parts Management is one of the most important control functions in your collision repair business. With Parts accounting for a high percentage of every Repair Order, complete and detailed Parts Management is the key to financial success.

We hope to provide you with the knowledge to improve how you manage your repair orders and also how you can increase controls and profits in your Parts Department.

# Repair Order Management

## RO View

All of Summit's software provides you with a clean, simple, yet powerful "view" of Repair Order information in its RO List View. The concept behind this view is to provide the end user with as much information as possible **WITHOUT** overwhelming them, PLUS allow them to get to other information with the least number of "mouse clicks" as possible.

Here is an overview of Summit's RO List View:

*Customer, Vehicle,* and other *RO* related information is always at the top of your screen.

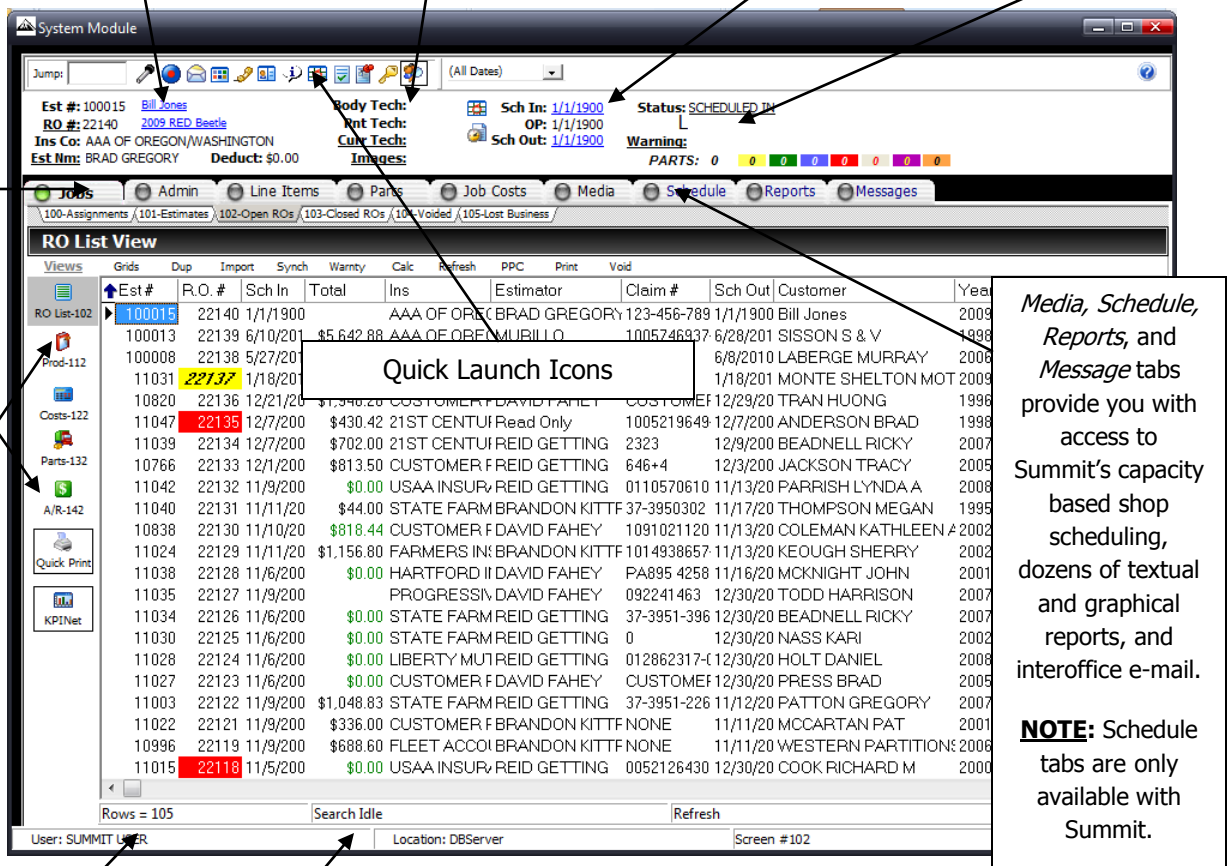
*Body, Paint*, and *Current Tech,* and # of *Images* on existing Repair Order

Scheduled *IN, OUT*, and (*OP* ) Original Promise Date

*Vehicle Status, Production "Warning Flag*, and *Parts Status*

*Jobs, Admin, Line Items*, and *Job Costs* tabs allow you to "drill down" into selected RO.

Front page "Views"




Quick Launch Icons

*Media, Schedule, Reports*, and *Message* tabs provide you with access to Summit's capacity based shop scheduling, dozens of textual and graphical reports, and interoffice e-mail.

**NOTE:** Schedule tabs are only available with Summit.

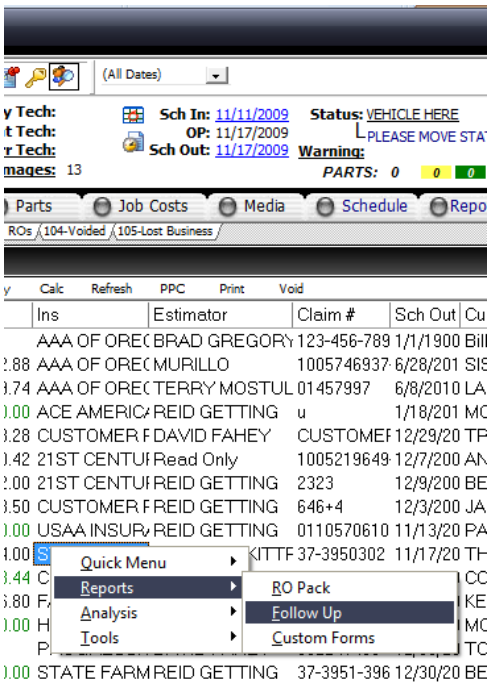
# of Active RO's

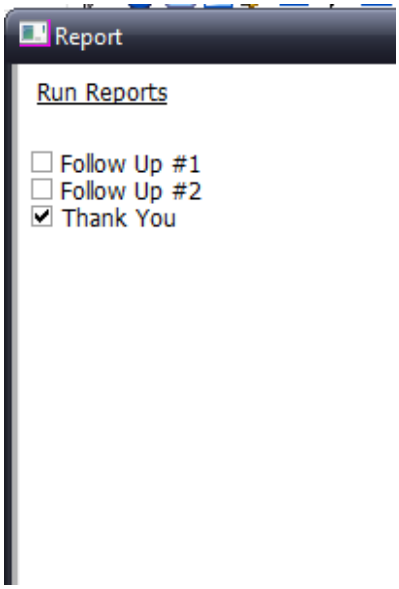
Search status

# The RO List "Right Click" Action Items Box

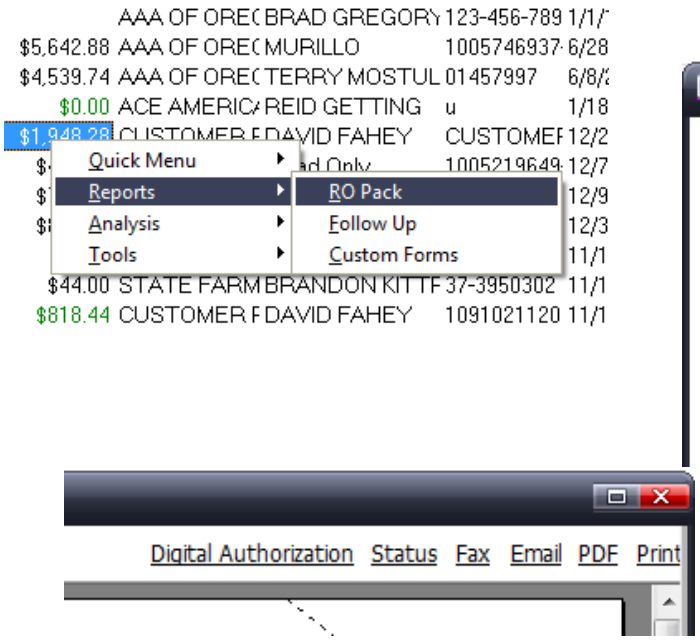
The RO List "Right Click" Action Items Box provides users with easy access to the following RO related functions:

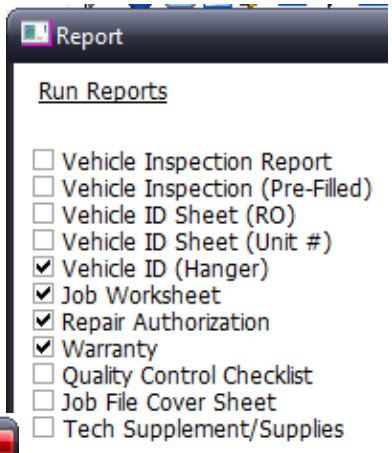
Summit RO *Follow Up* System allows Summit users to print three letters.



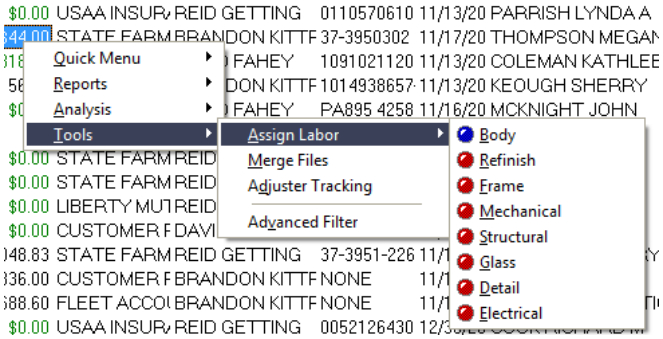



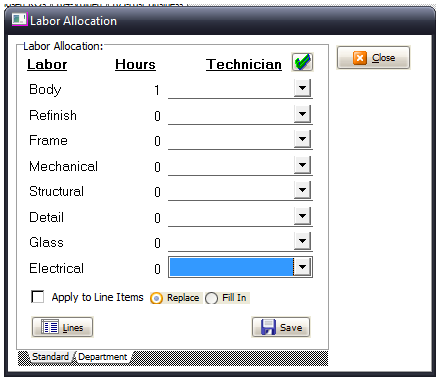

Access to the RO *Report* Pack allows Summit users to pre-set RO reports for every RO that is printed. You can also fax or e-mail any of these reports.



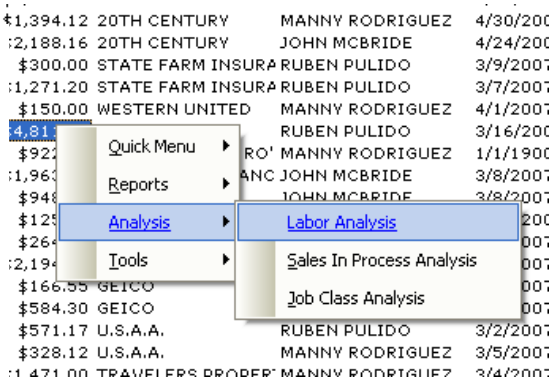



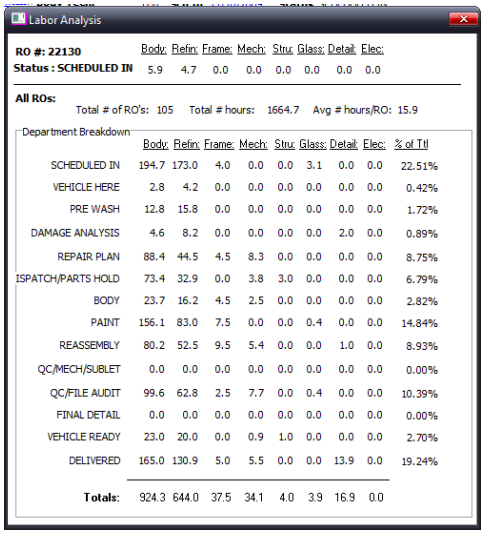
Access to Summit's *Labor Dispatching and Assignment* System allows Summit users to assign and dispatch labor directly from the RO screen. **Green** means the labor has already been dispatched, **Blue** means hours NEED to be dispatched, and **Red** means there are NO hours on this RO!



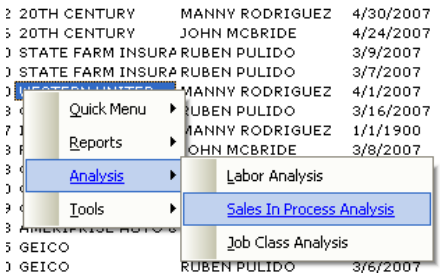



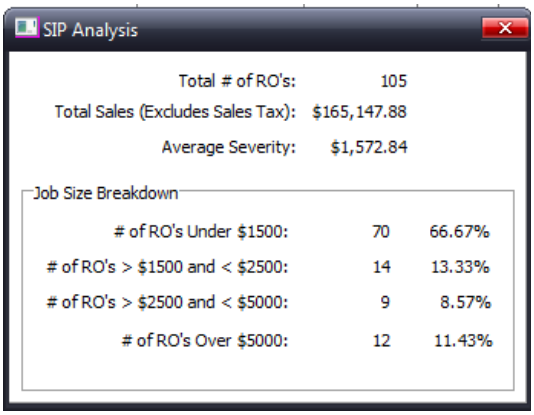

Access to the *Labor Analysis* View provides Summit users with a quick and easy way to evaluate the number of hours of labor in the shop as well as each department!



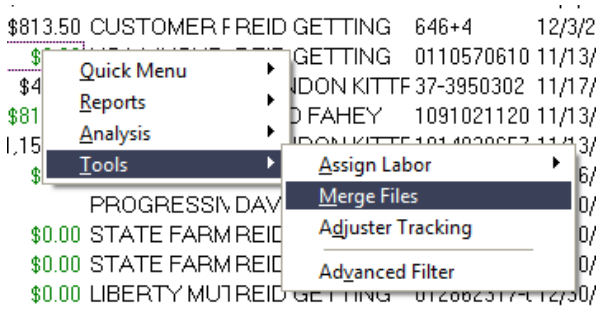



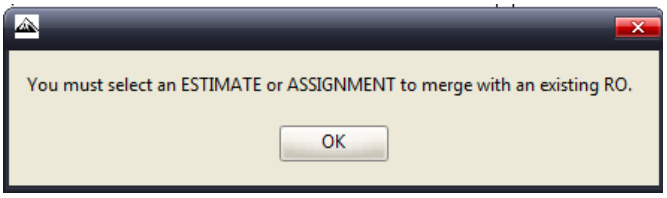

Access to the *Sales In Process* View provides Summit Users with a quick and easy way to evaluate the breakdown of their Sales in Process by 4 different levels of severity as well as Average Severity. This is a great tool for load leveling.



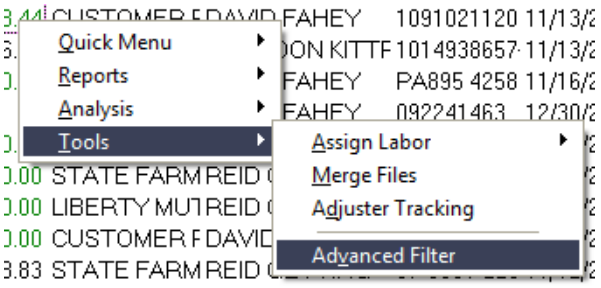



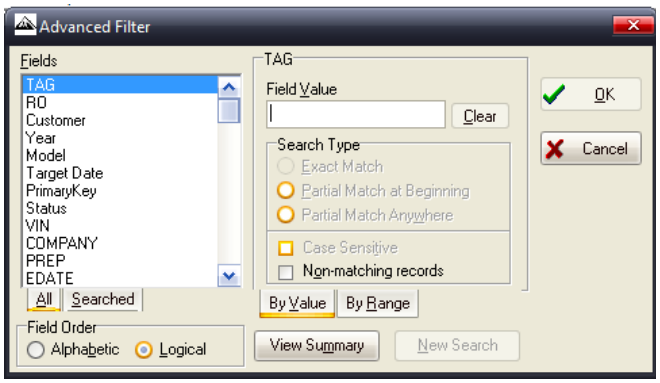
Access to the RO Merge Function allows Summit users to Merges existing RO's with Estimates. This is very useful for Tow-Ins.




Access to the *Advanced Filter* Function provides Summit users with an EXTREMELY powerful filter that has 70 different filter choices.

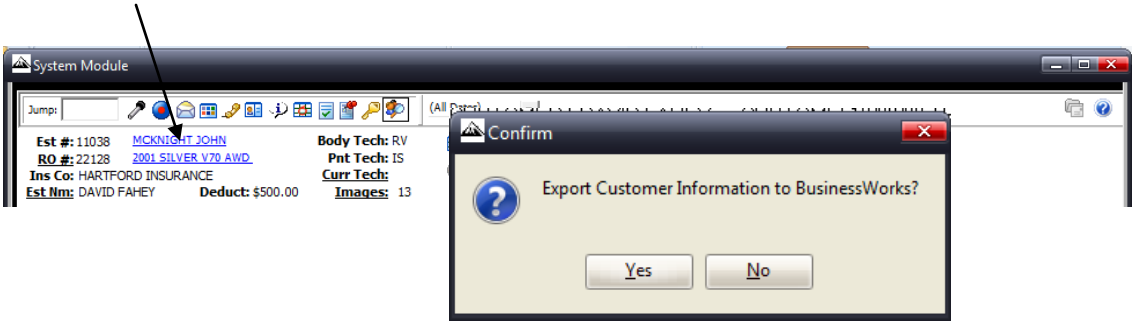


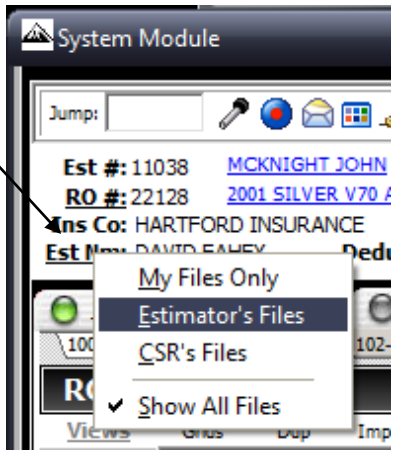

## The Summit Information Bar

The Summit Information Bar provides you with key RO information as well as filters and controls.

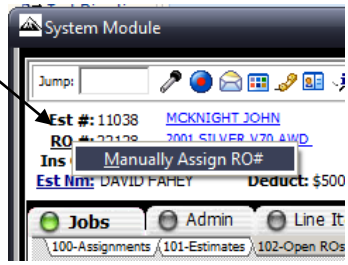
To export customer information to Quickbooks, Business Works, or Peachtree accounting software simply "left click" on the customer link.

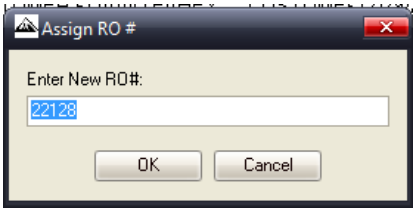


To filter the RO List by Estimator or CSR simply "right click" on Est Nm.

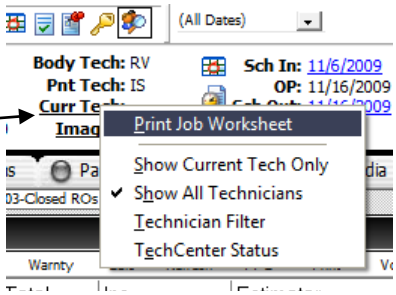



To create your own RO#, "right click" on RO #. Please remember that Summit will allow you to create identical RO#'s when you manually assign your own RO#. You will need the Admin Password to create your RO #.



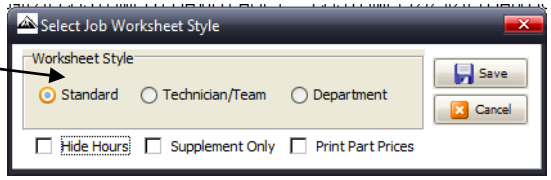



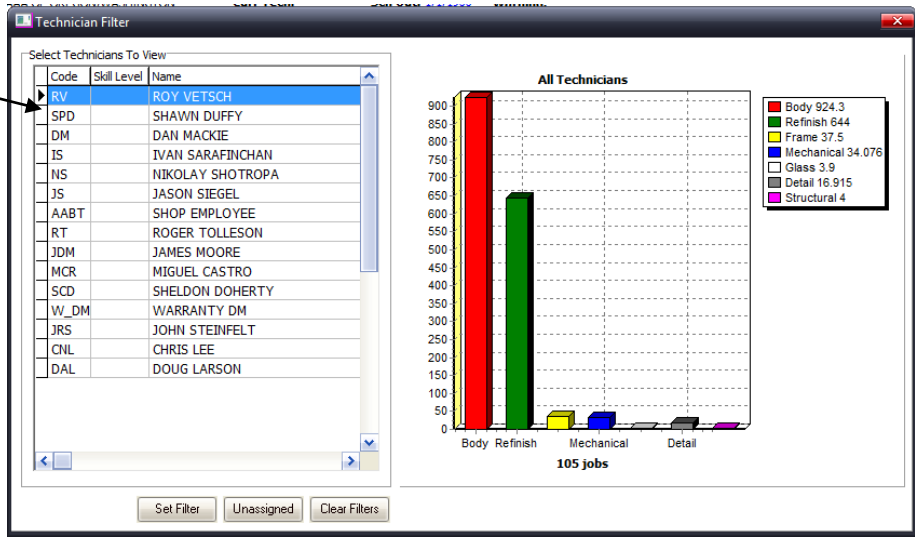

Summit Technician Controls can be accessed by "right clicking" on Curr Tech.




Within this control you have the ability to:

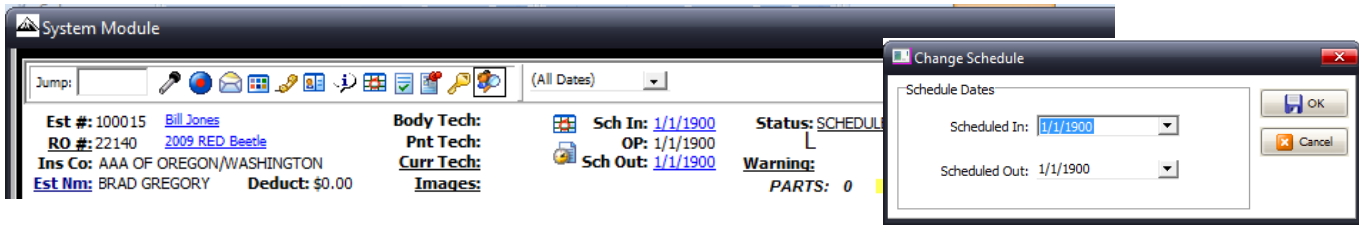
1. Print a Worksheet for this Particular RO
2. Filter RO List by currently assigned Tech
3. Filter by individual Tech and View Workload



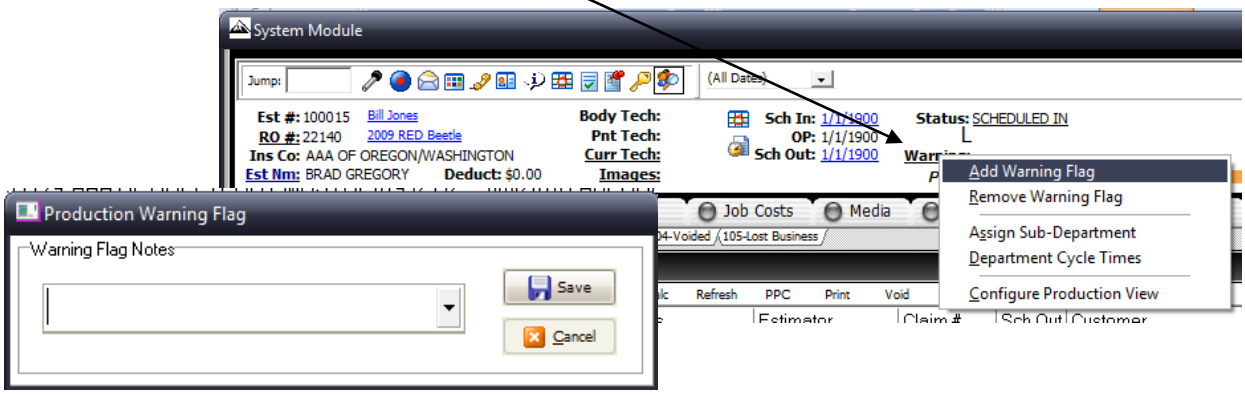



Date Changes

Changing *Scheduled In* / Scheduled Out Dates: "Left click" on hyperlinked *Sch In* or Sched Out Date.

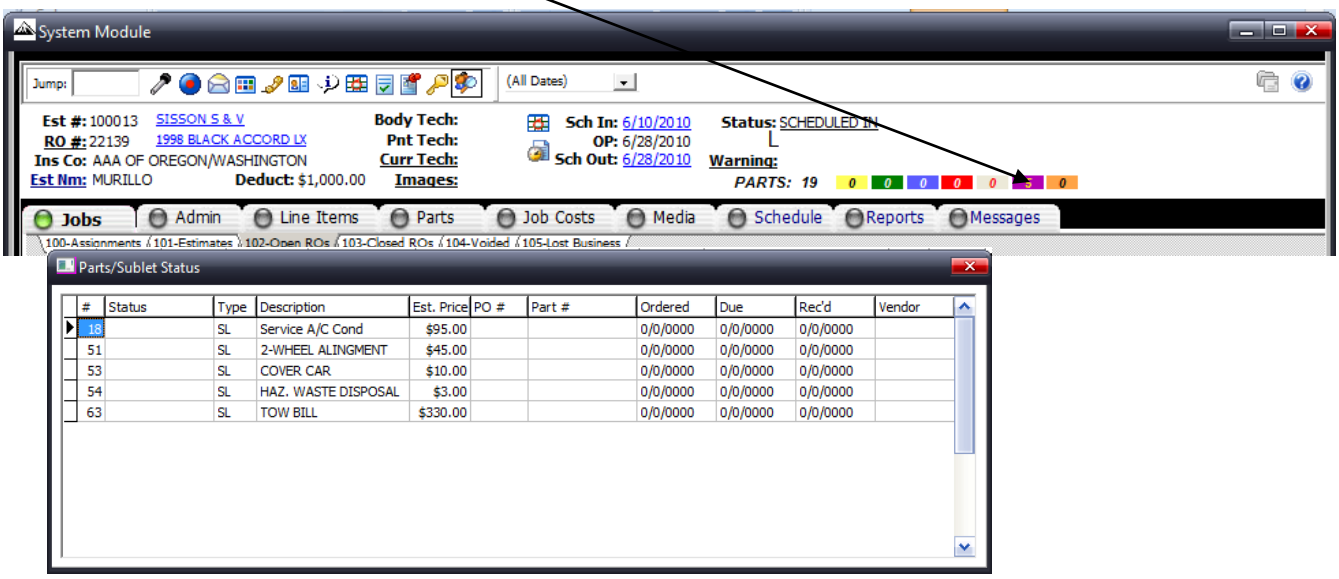



Adding, Changing Warning Flags: "Right Click" on *Warning.* The *Warning Flag* control allows you to pick from a "drop down" menu or type in a description of your choice. NOTE: These are pre-set in the Administration Module.




## Viewing the *# of Sublet* Repair Lines in a particular Repair Order:

To view the # of Sublet lines you have in a particular RO "left click" in the purple PARTS status box and Summit will list the detailed Sublet lines on that RO.



# The Summit Job Tab Bar

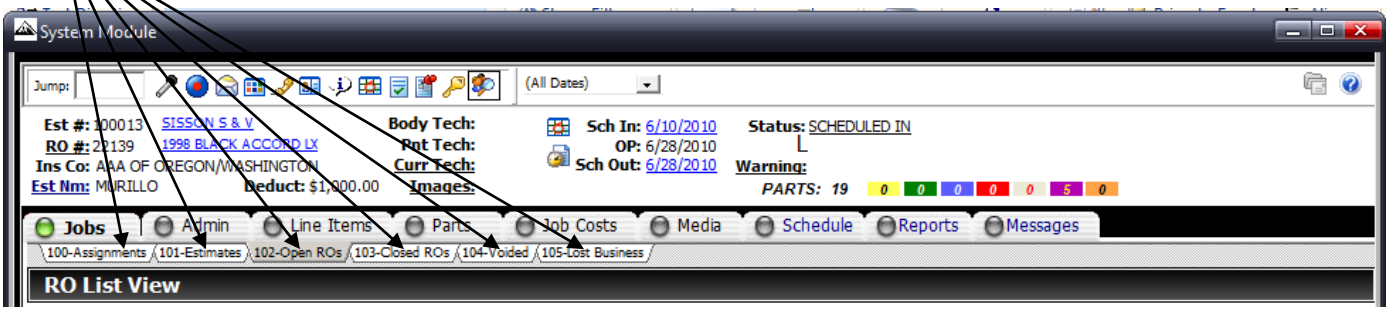
The Summit Job Tab Bar provides you with key Individual RO access and controls for:

- Jobs
- Admin
- Line Items
- Parts
- Job Costs
- Imaging

One Key concept to remember on the Job Tab Bar is that the Quick Access Icons are RO SPECIFIC.

## Jobs Tab

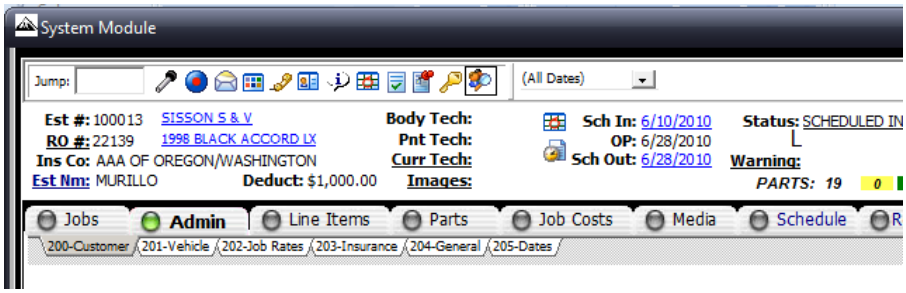
Under the Jobs tab there are six subtabs. These subtabs provide you with a list of all Estimates / RO's within that specific tab.




## Admin Tab

The Admin Tab Contains Estimate and RO Administrative Data. To access detailed information on a specific RO: highlight the RO and "click" on the Admin Tab. Under the Admin Tab you will have direct access to the following data entry screens:

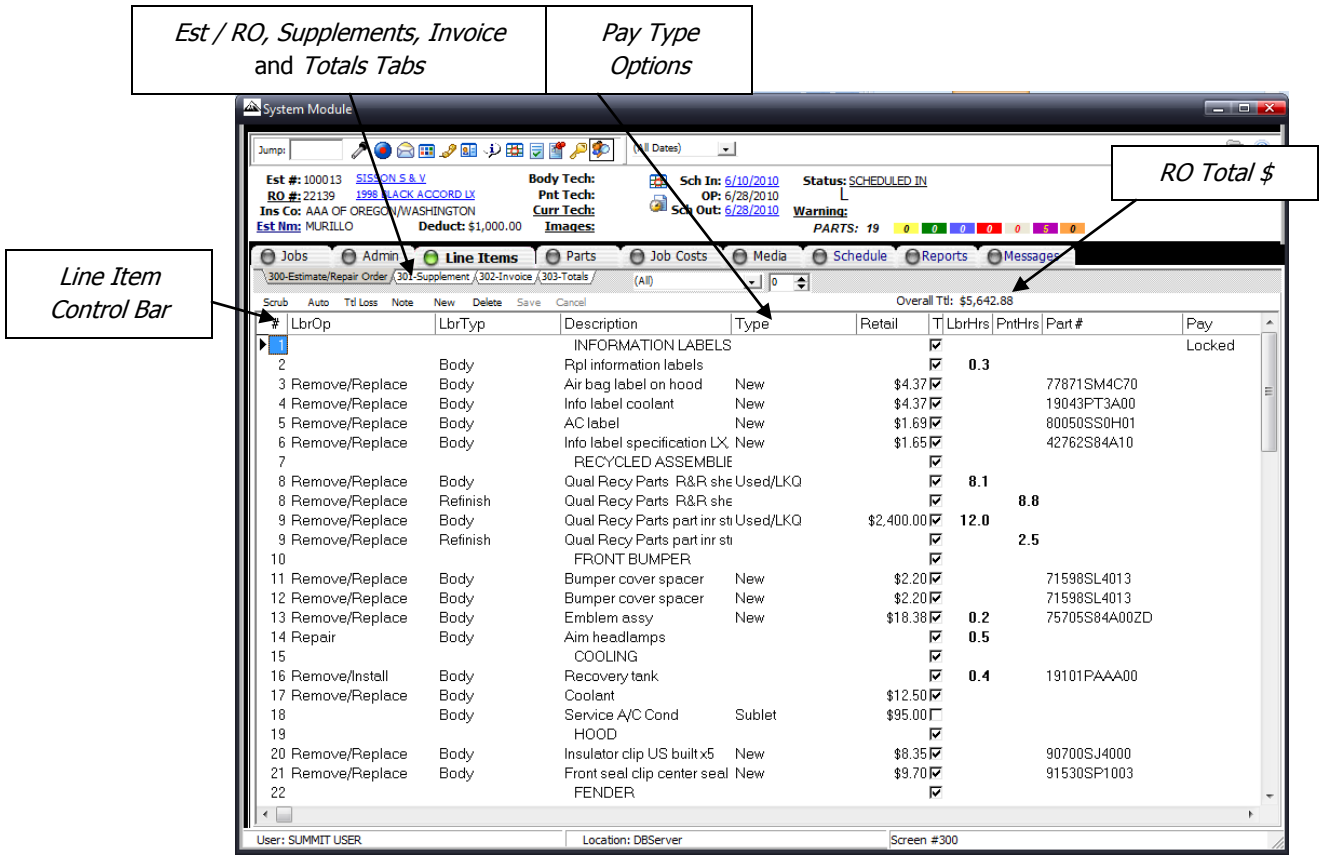
- ✓ 200-Customer Info
- ✓ 201-Vehicle Info
- ✓ 202-Job Rates: Imported from your Estimating System
- ✓ 203-General Info
- ✓ 204-RO Dates



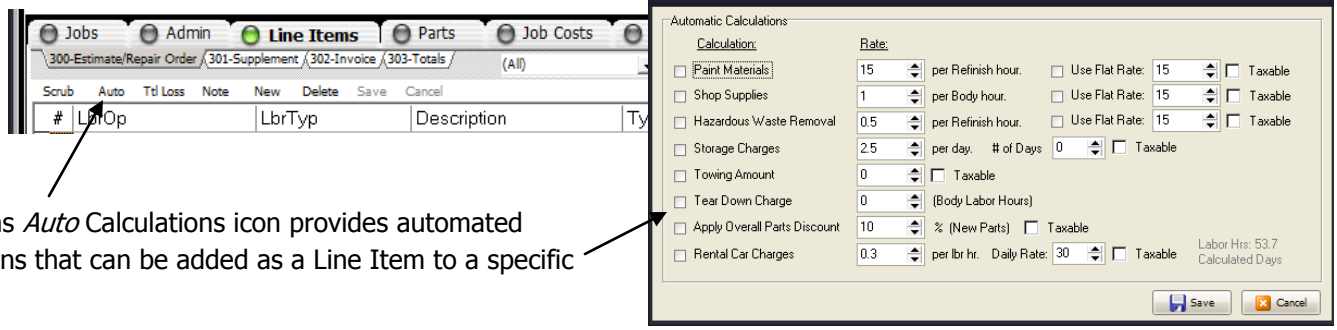
## Line Items Tab

To access detailed Line Item information on a specific RO: highlight the RO and "click" on the Line Items Tab. Under the Line Items Tab you will have direct access to individual lines of the imported estimate.

### Line Items Tab Overview

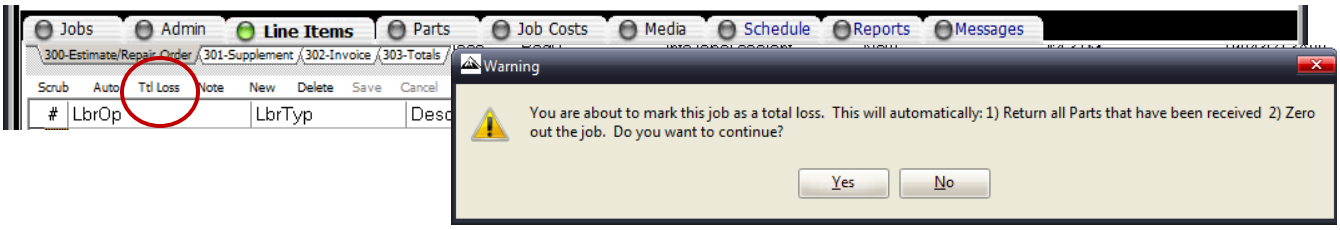



The Line Item Control Bar provides you with key controls to help manage and control your repair order processes. The Key Controls are:

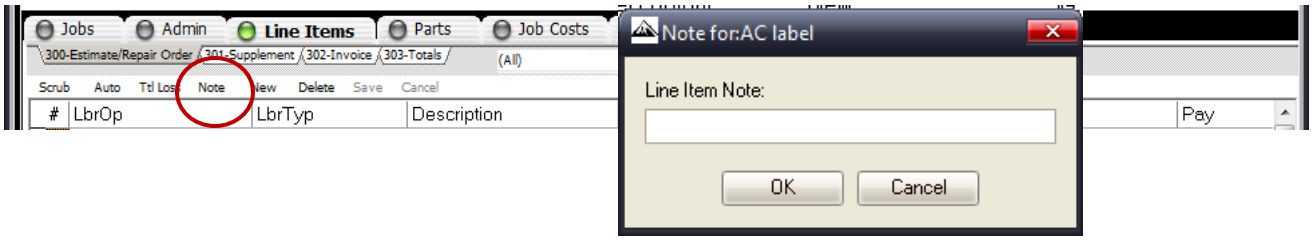



Line Items *Auto* Calculations icon provides automated calculations that can be added as a Line Item to a specific RO.

The Total Loss Controls icon provides you with the ability to create a Total Loss RO with a single click of the mouse. In addition to creating a Total Loss RO, Summit also marks any received parts as returned PLUS can retain any labor associated with the RO. It also makes the RO **Red** in the RO List.

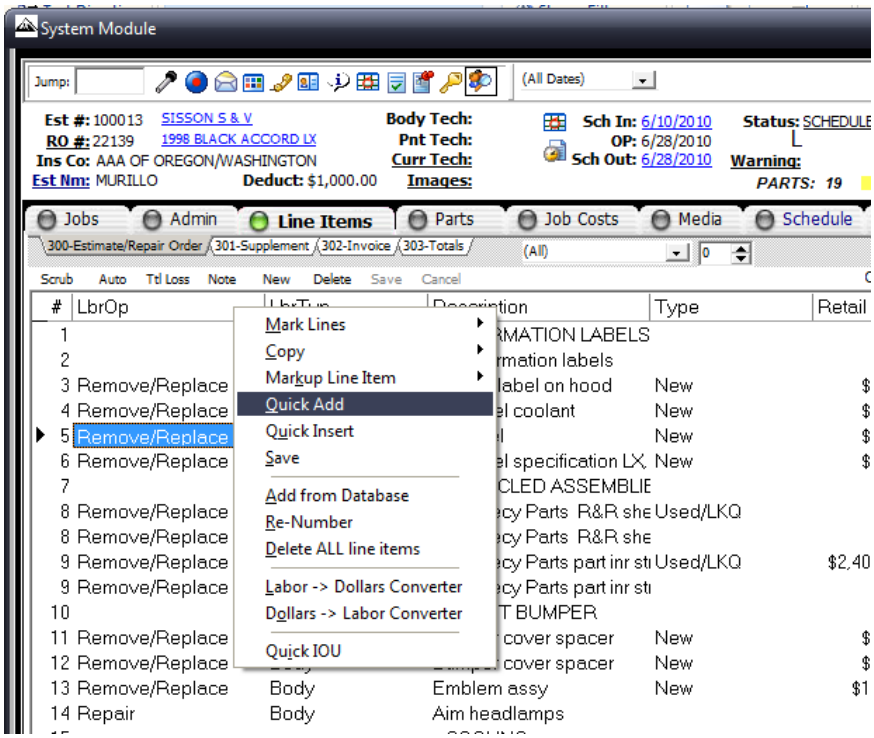



Line Item Notes icon allows users to place a note in the Line Item to emphasize an action or extra attention. When you enter a note the line turns a "blue green" and the note will appear on the Tech Work Order.




Summit's Estimate/RO Lines View provides the end user with as much flexibility as you will need to…

Match Estimates to RO's.
Properly classify line items to match your financial system.
Properly classify line items to match labor and payroll.
Utilize and track custom accounts.
Mark individual line Insurance Pay, Customer Pay, Shop Pay, Total Loss, or Adjust to Match.
"Lock" lines to eliminate Estimate/Repair Order Ping Pong.
Copy Line Items.
Copy Refinish Lines Only.
Upgrade a Part from One Status to Another.
Add Manual Lines from Summit's Own Data Base.
Re-Number Line Items.
Delete All Lines.
Convert Labor to Dollars.
Convert Dollars to Labor.

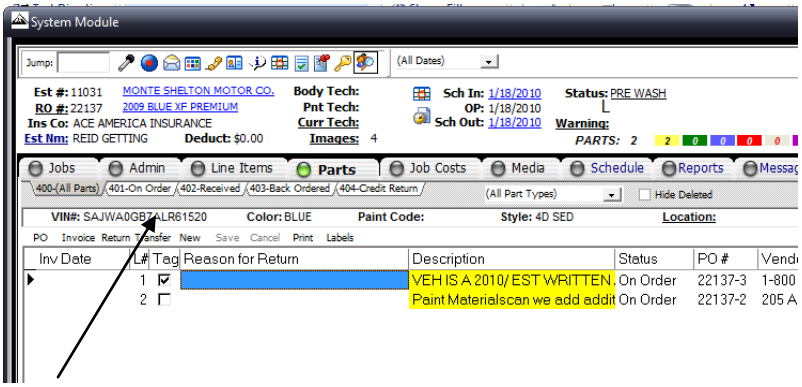


## Parts Tab

Summit's Parts Tab provides the end user with complete control over the Parts Management Process for an RO. Included features and functions are:

### Ordering Parts

1. Click on the Open ROs tab and choose the RO List view




2. Highlight the RO that parts will be ordered for

3. Click the *Parts* tab.

4. Verify that all parts are under the *All Parts* drop down.

5. Select the *"Part Type"* that needs to be selected. This filters out all other "Part Types".

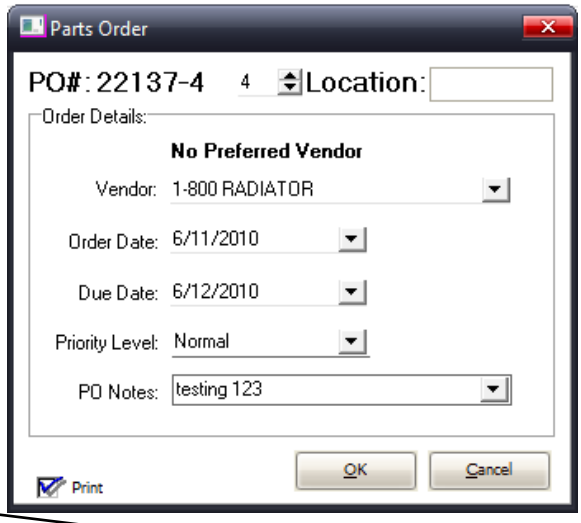
6. "Tag" the parts to be ordered by putting a check mark in the box located to the left of the part name (it is in the *Tag* column)

7. Click-and-drag ONE of the parts that were tagged up to the *On Order* tab. **IMPORTANT NOTE**: By clicking-and-dragging ONE tagged part to the *On Order* tab, you move ALL tagged parts to the *On Order* tab.

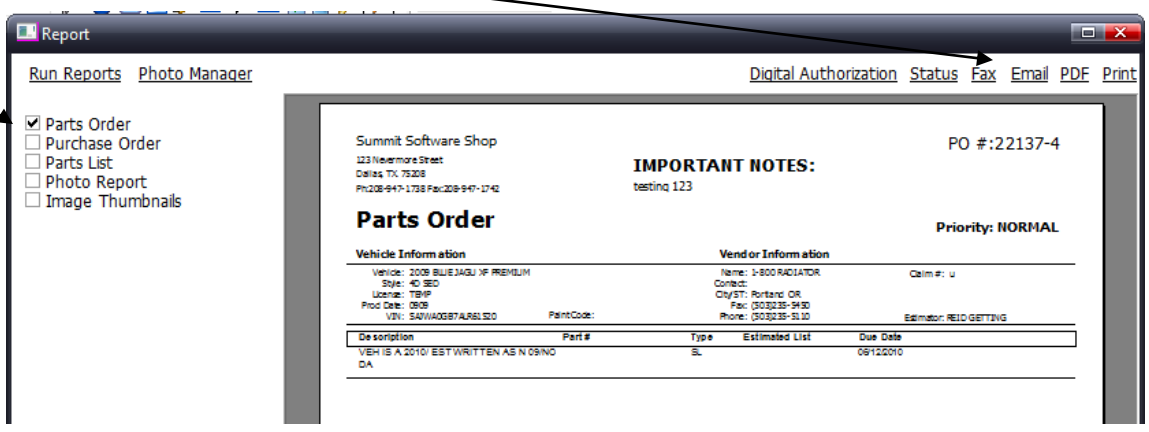
8. Choose a vendor, verify the date and PO#, then click OK

**NOTE**: If you have set up default vendors in the Summit System Administration module your vendor will be chose automatically

9. To print, fax, or e-mail the parts order, check the Print box then click *OK.*




The Report box will allow you to print the report of your choice and send it via fax or email.

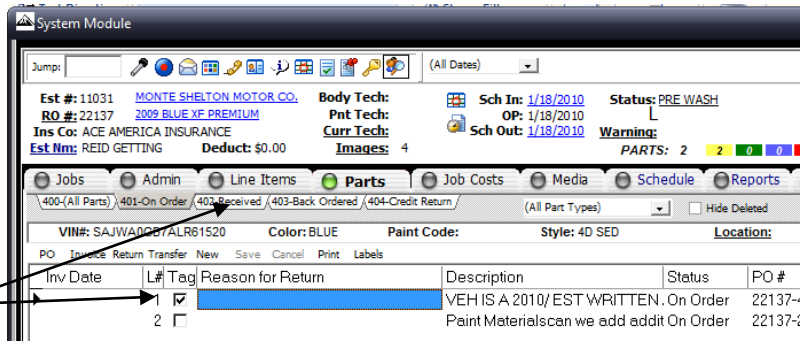


## Receiving Parts

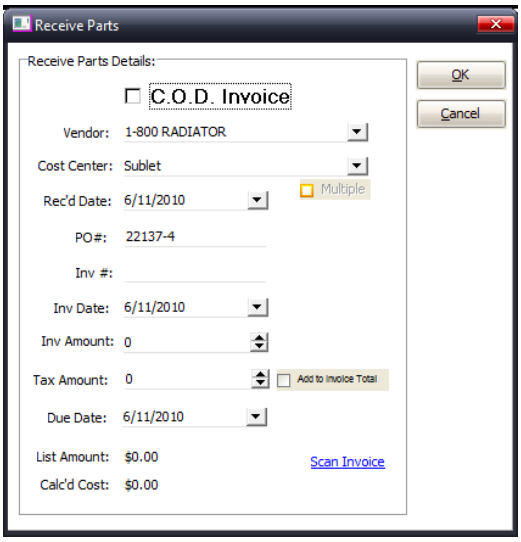
1. Click on the *On Order* tab

2. Check the *Estimated List* and *Actual Cost* against the vendor invoice. Make changes in Summit to match the invoice. If the list price changed, enter the new list price in the *Adjusted List* column. If the actual price changed, enter the new price in the *Actual Cost* column

3. "*Tag*" the parts to be received, and click-and-drag one of the parts to the Received tab (same procedure as ordering parts)




4. Fill in the remaining invoice information in the Receive Parts window, then click OK. **NOTE**: The invoice is automatically posted to the *Vendor Costs* tab under the *Job Costs* button.




## Back Ordered and Credit Returned Parts

1. Follow the same procedure (as above) to place parts on *Back Ordered* and *Credit Return.* Tag, Drag and Drop.

**IMPORTANT NOTE**: Clicking-and-dragging a part to the Credit Return tab will cause the line item containing the part to be deleted from the Repair Order. This is used when the part is not needed. If you want to return a part and reorder another to replace it, highlight the part and click the *Return and Reorder* button, located in the menu bar above the parts line items. This will place one part in *Credit Return* and a copy of it in *On Order*.

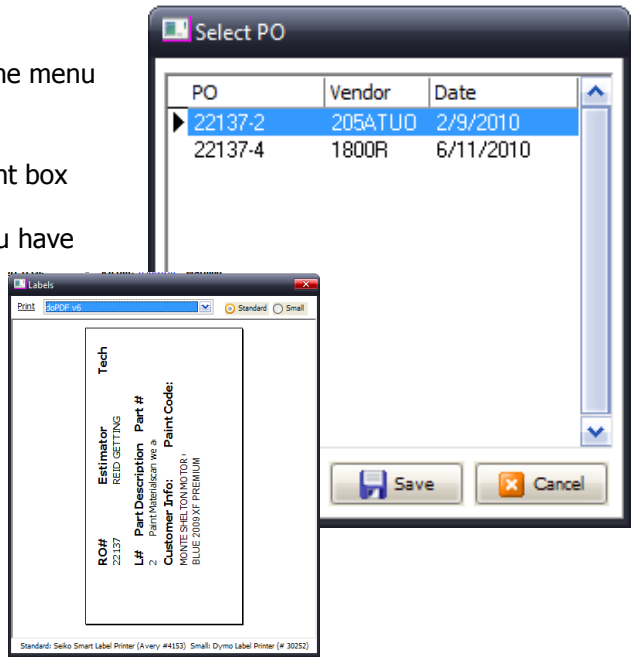
## Print the Parts Labels

To print the appropriate label you MUST be in the received tab

1. Click the *Parts* tab. Then click the *Labels* link located in the menu bar on the top-middle of the screen.

2. Once you have selected the Label ICON the following print box appears.
Click *Save* and Summit will print the same # of labels as you have on the order.

**NOTE**: Summit recommends Seiko printers for parts labels

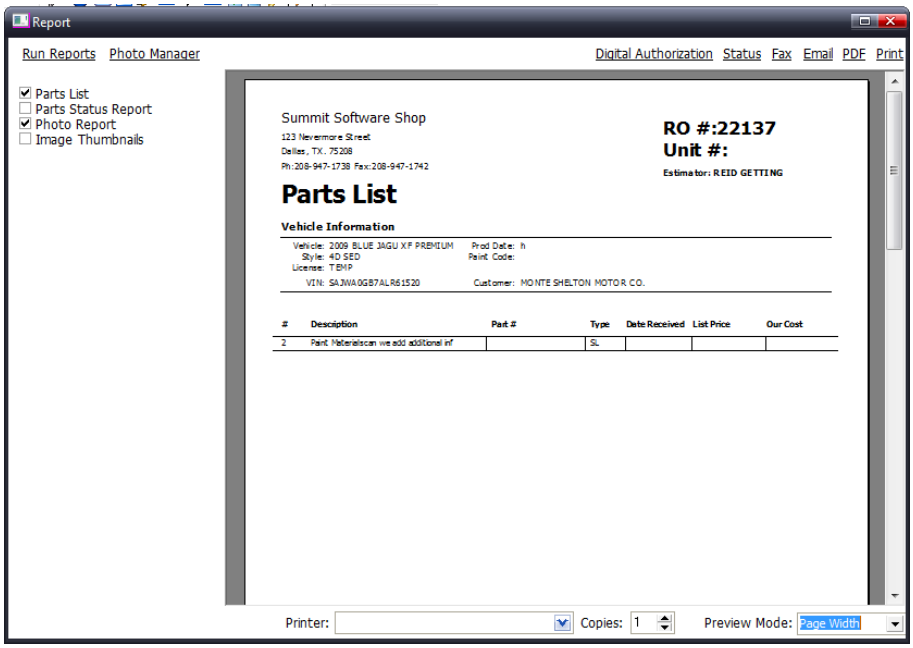



## Print the Parts Status and Parts List Reports

1. Click the *All Parts* tab.

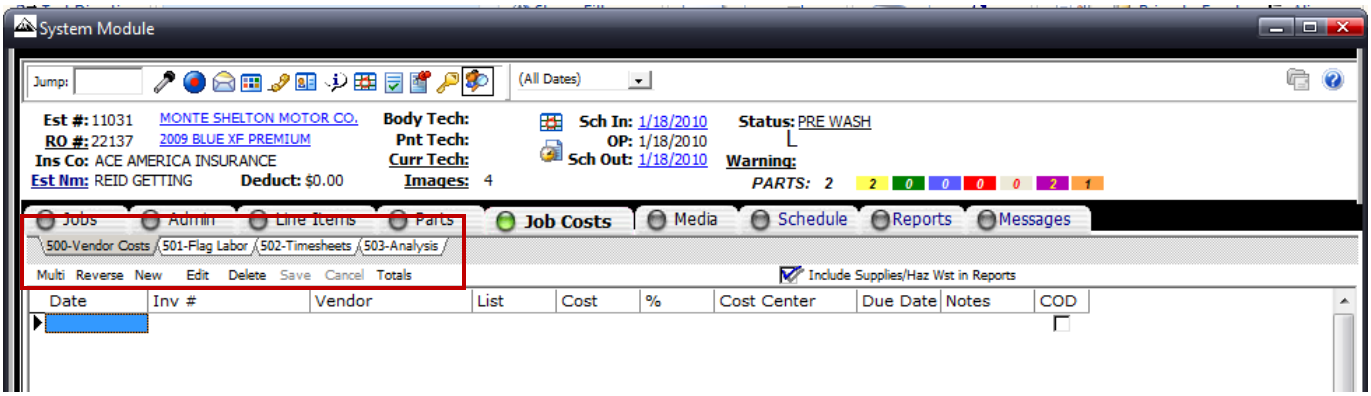
2. Then click the *Print* icon located in the menu bar on the left side of the screen

3. In the menu that appears, place a check mark in the box next to *Parts Status* or *Parts List* and click the *Print* button



# Job Costs Tab

The Job Costs Tab provides the end user with complete control over all costs associated with an individual Repair Order. Included features and functions are: Vendor Costs, Flag Labor, Timesheets and Analysis.




## Enter Vendor Costs Manually

Summit automatically posts vendor costs as parts are received

1. Vendor Costs can also be entered manually. Choose the RO you would like to add a vendor cost to (in the RO List).

2. Click the *Job Costs* button and then click the *Vendor Costs* tab.

3. Click the *New* button in the menu bar on the left side of the screen.

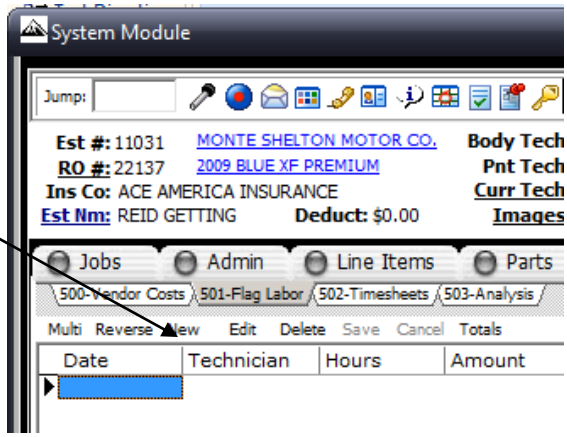
4. In the window that appears, fill in the vendor, invoice date, invoice #, amount, cost center, due date and any notes pertaining to the invoice. When all information has been entered, click Save.

## Manually Flagging Flat Rate or Commission Labor Costs

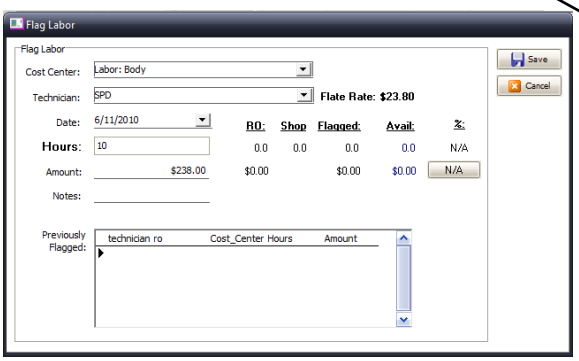
1. To manually flag labor, choose the RO you would like to flag labor to (in the RO List).

2. Click the *Job Costs* button and the *Flag Labor* tab.

3. Click the *New* button in the menu bar on the top of the screen




4. Enter the appropriate information in the window that appears. After all information has been entered, click the Save icon.



## Costing Paint Materials, Hazardous Waste, and Shop Supplies

1. Choose the RO you would like to add the costs to (in the *RO List* view).

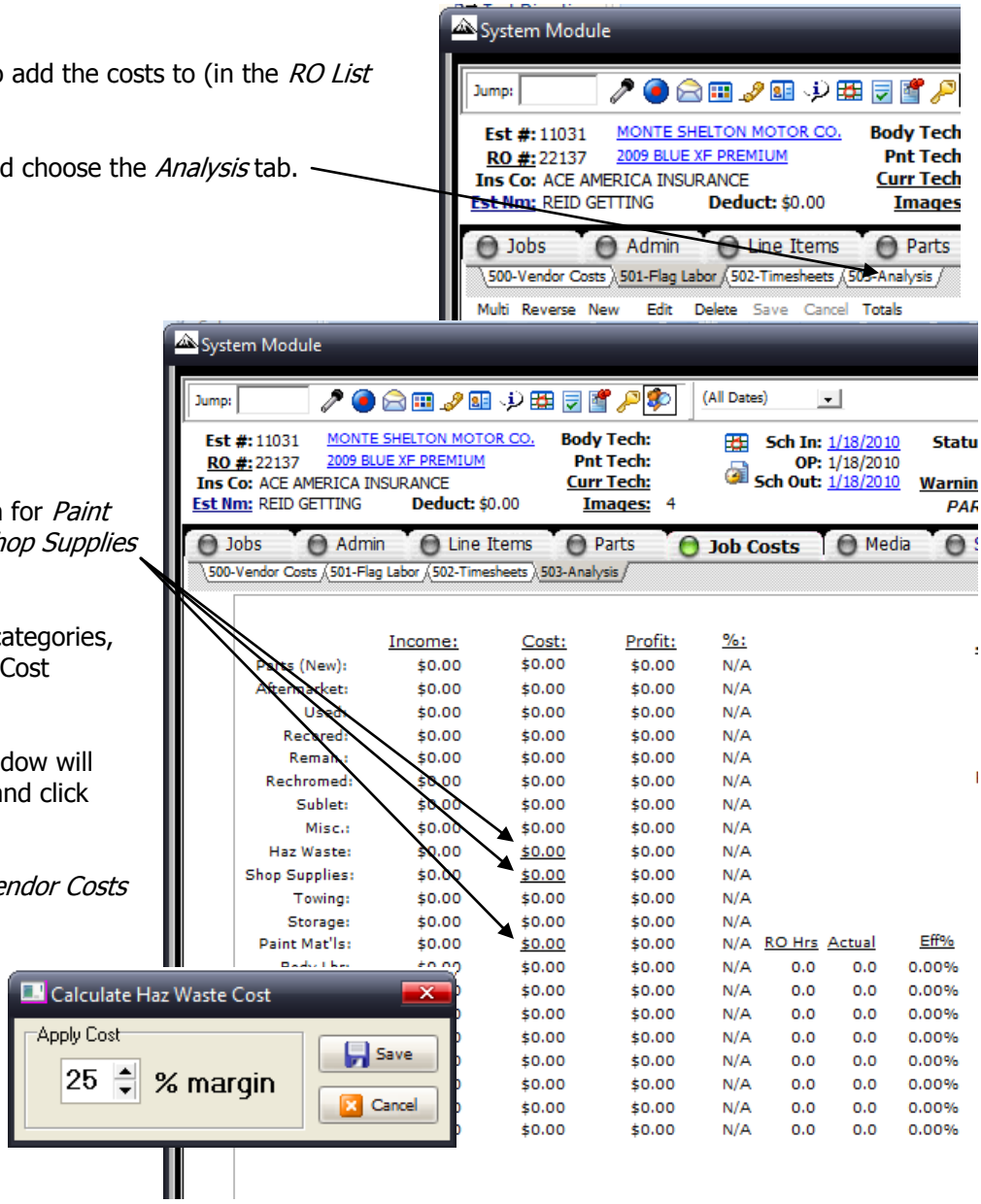
2. Click on the *Job Costs* button and choose the *Analysis* tab.

3. The numbers in the Cost column for *Paint Materials, Hazardous Waste* and *Shop Supplies* will be underlined.

4. To post a cost for any of these categories, click the underlined number in the Cost column.

5. The *Calculate Materials Cost* window will appear. Choose a percent margin and click Save.

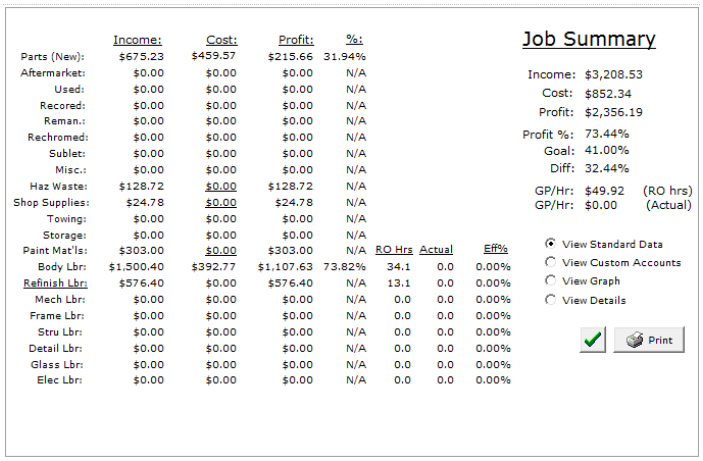
6. The cost will be posted in the *Vendor Costs* tab.




## Job Costs Analysis Tab

The Summit *Job Cost Analysis* Tab provides you with a quick and easy way to evaluate your profitability on any particular Repair Order. It also provides you with….

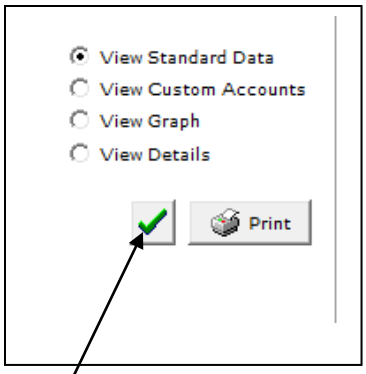
- Gross Profit per RO Hours
- Gross Profit per Actual Hour
- Custom Account Performance
- Graphical Views of the RO Profitability
- Detailed View of All Costs on the RO
- Automated Pre-Close Check
- "2" Job Cost Analysis Reports



## Analysis Views:

There are four (4) available views of the analysis tab:

- ✓ Standard data
- ✓ Custom Accounts
- ✓ Graph
- ✓ Details

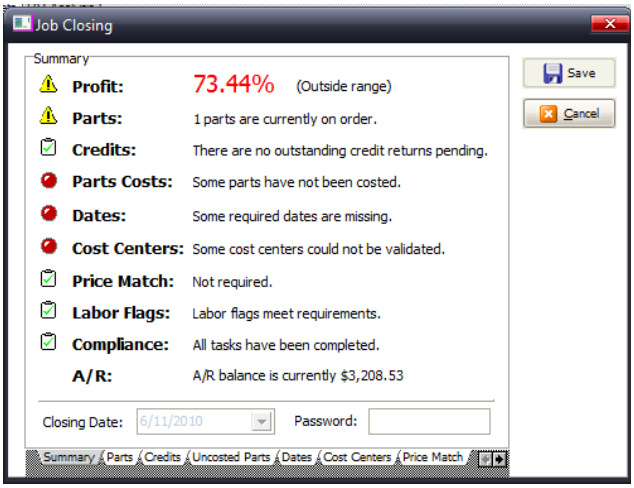



## Pre-Close Checklist

Summit's Pre-Close Check can save you up to 20 minutes an RO PLUS insure that EVERY Repair Order is correct PRIOR to posting to your accounting system.

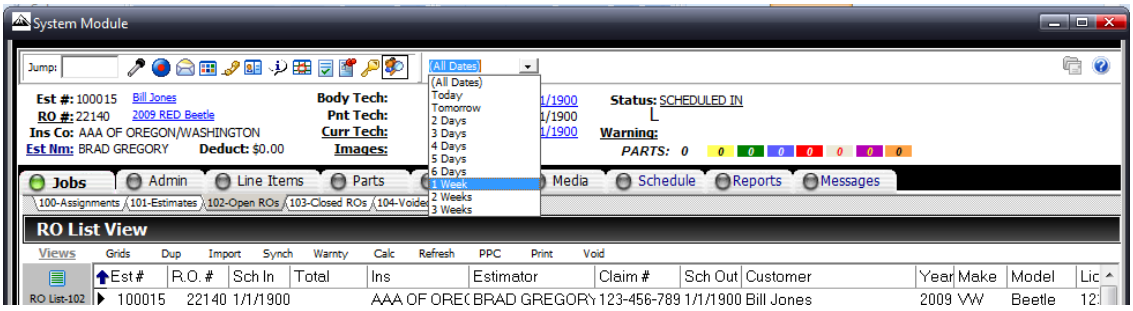
Launch by clicking on the Checkmark on the Analysis Screen.

If you have a **Red dot** simply find the corresponding Tab at the bottom of the screen and "click" on it to see what you need to correct PRIOR to closing the RO.




# Date Range Filtering

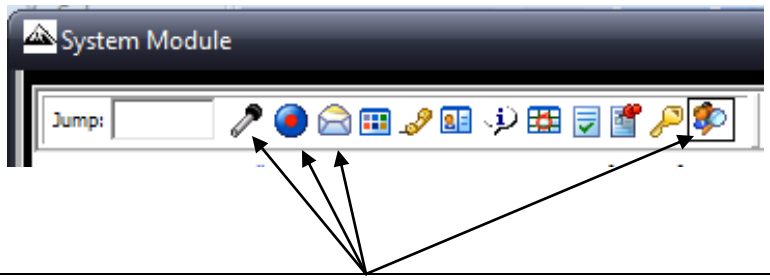
Select the "out date" range and Summit will filter the RO list view by your selection



# Quick Launch Buttons

The following quick launch buttons allow for faster use of the system:

- Jump
- Voice Recording
- Macro
- Email/Interoffice Mail
- Dashboard (Not available in Ascent)
- Phonebook
- Quick Contact
- IOU
- Schedule an Appointment
- Compliance Tasklist
- Job History/Notes
- Lock Screen
- Search



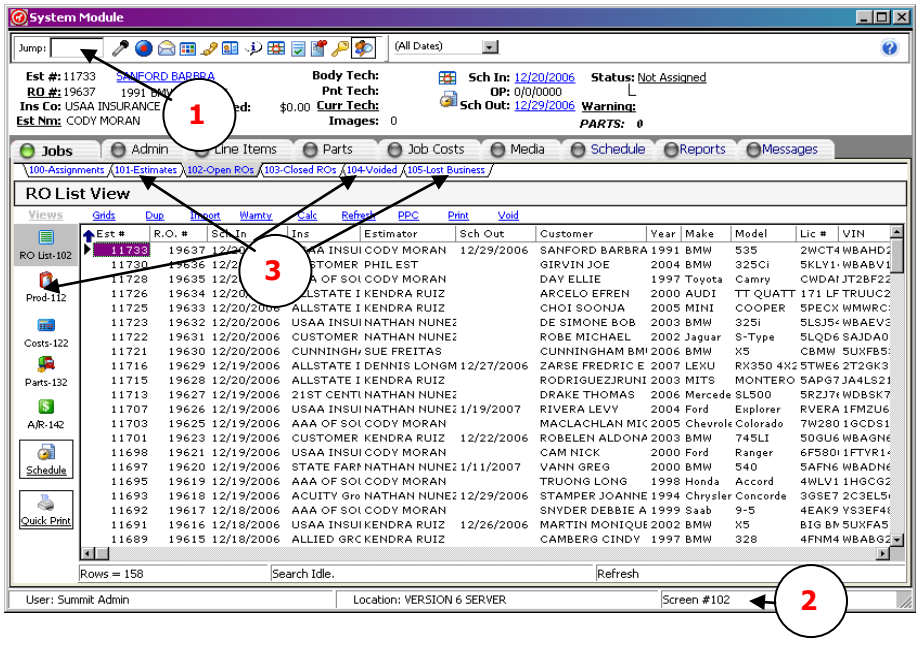

Each Quick Launch Button has a "Hover Over Description." Wave your mouse pointer over each icon and it will identify itself.

## Jump

You now have the ability to "jump" from screen to screen by simply typing the screen number into the "jump box" (1) located in the top, left corner of summit and hitting the "enter" key on your keyboard. Each screen has been assigned a screen number (2) and can be located by clicking on the tabs and identifying the sub-tab number. (3) Views also have a screen number that can be used to Jump.

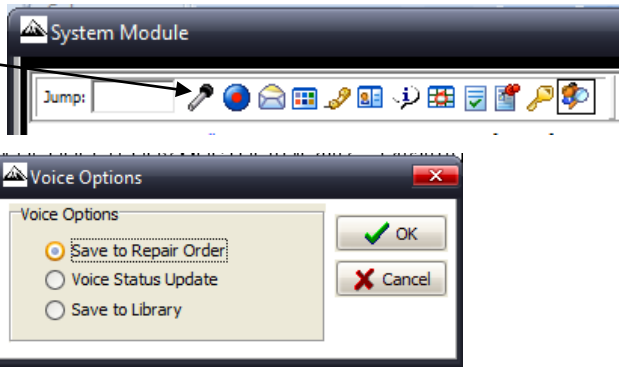
Note: If you are working in a screen and want to jump to a different screen without using the mouse, you can use your keyboard by hitting

"Crtl – J" to go to the "jump" box.



## Voice Recording

You can record audio in summit by clicking on the Voice Recording button.




This will allow you to save an audio file(.wav) to:

Repair Order
Voice Status Update (SOD)
Library (Available through the dashboard)

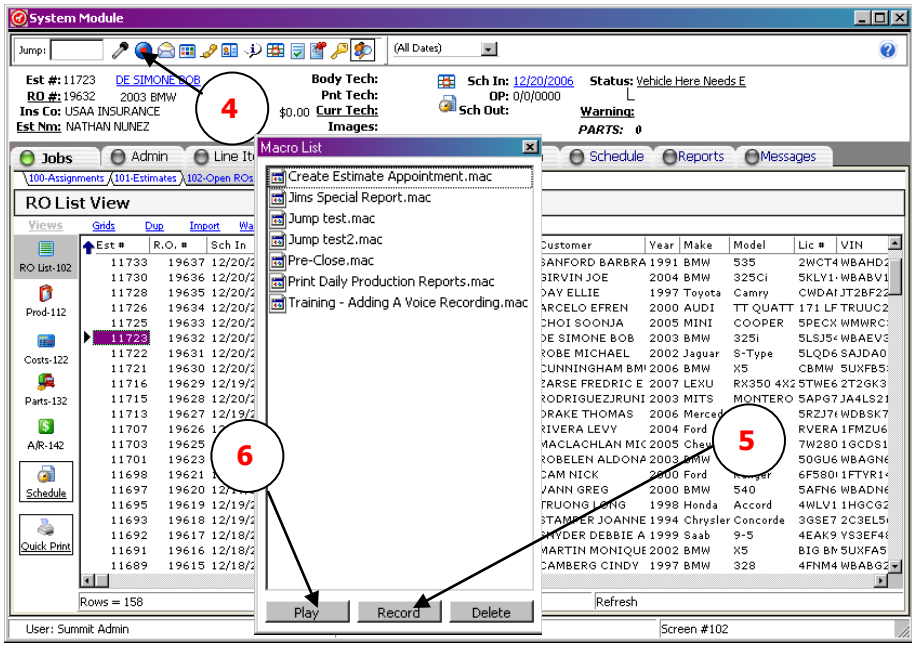
## Macros

If you have a task you perform regularly that has the exact same steps you can use the Summit "Macro" (4) to record that task and play back whenever you'd like.

The Macro will record your steps (5) and allow you to play them back with one single click. (6)

Note: We recommend you start all "Macros" from the default RO list view. Although the macros support jumping, you will need to click on to the jump screen to start.

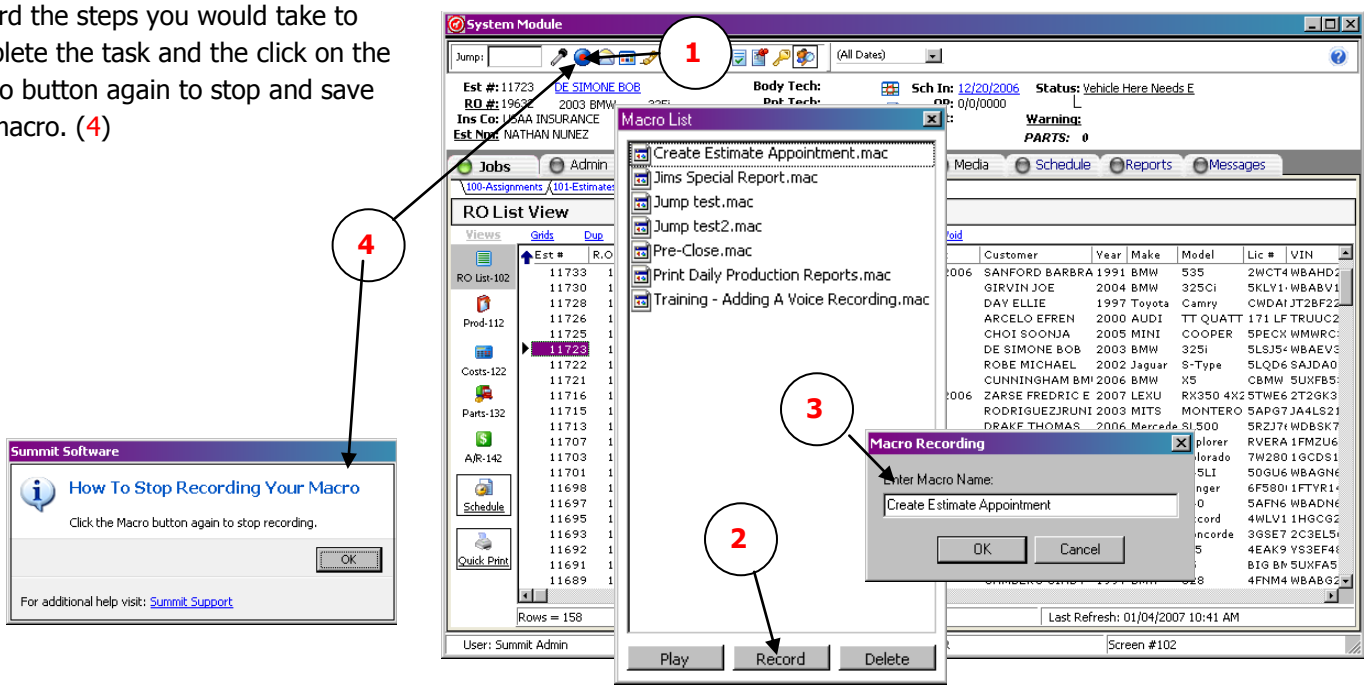
(No "Crtl-J" in Macros)



## To RECORD a Macro

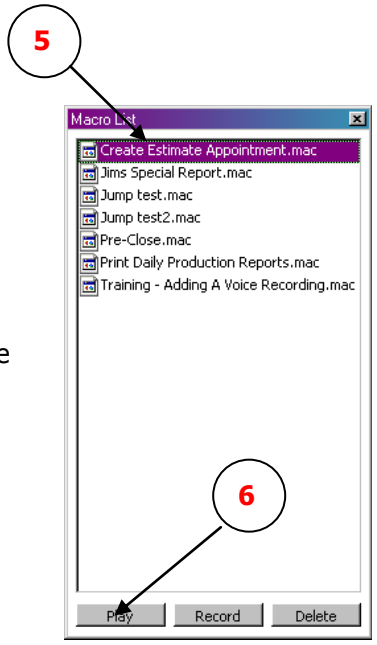
Click on the Macro button (1), click on the record button (2) and name your macro. (3)

Record the steps you would take to complete the task and the click on the macro button again to stop and save the macro. (4)




## To PLAY/RUN a Macro

Click on the Macro button, highlight the macro you choose to run (5) and click on the play button. (6) The Macro will duplicate your steps while you watch.

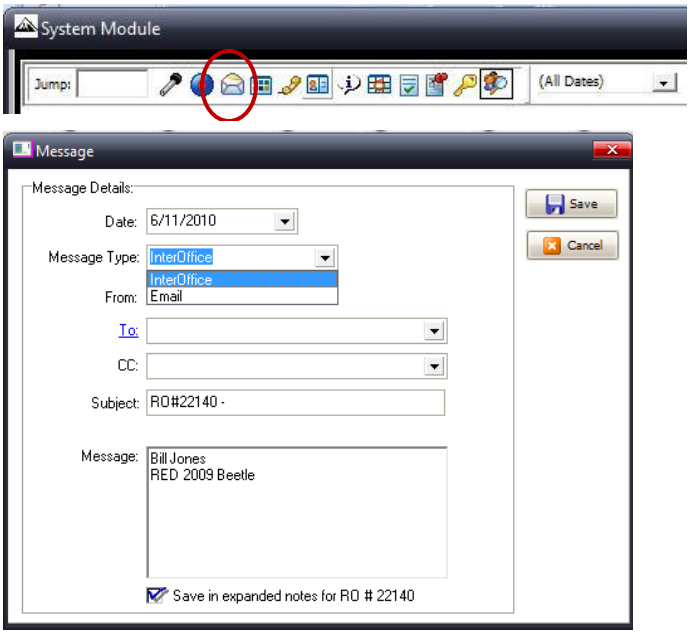



Note: When creating a Macro, remember to give your macro ample time to generate reports and open report engines that may take longer than the allotted time when creating the original Macro.

Note: Once a Macro has been started, you will not be able to stop the process until the Macro is complete.

## Email/Interoffice Mail

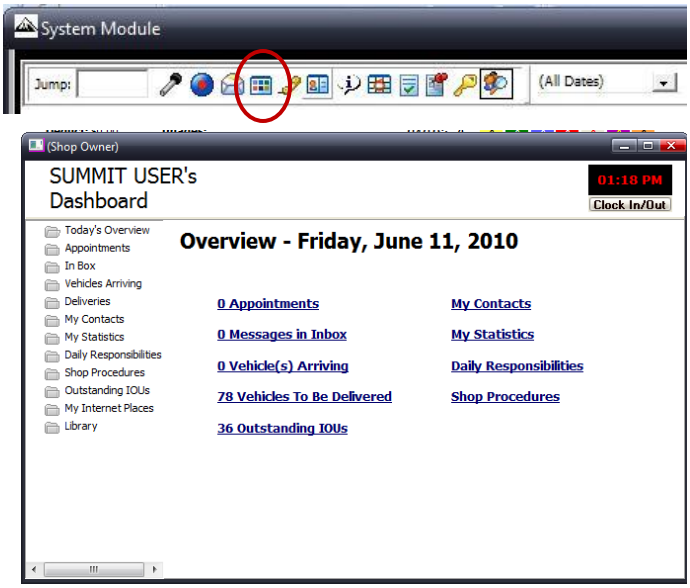
E-mail allows Summit users to select an RO from the list and send a direct e-mail to any internal user as well as any external e-mail address. You also have the ability to save the e-mail in Summit's Expanded Notes section.




## Dashboard

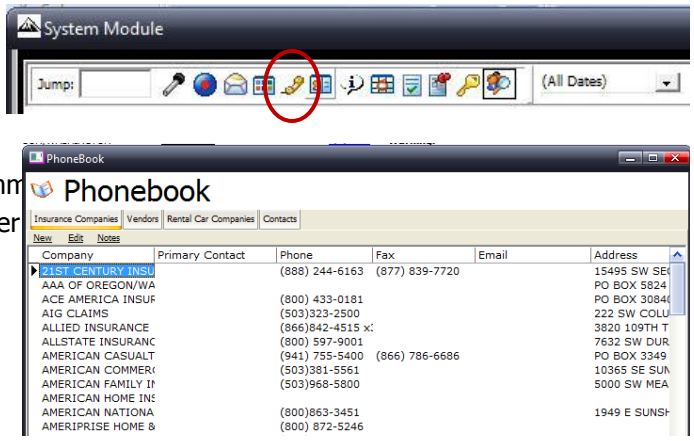
(Not available in Ascent)

"One-Click" Access to Personal Dashboards allows Summit users to access their personal dashboard to review their daily actions as well as log in and out for the day, breaks, or lunch.



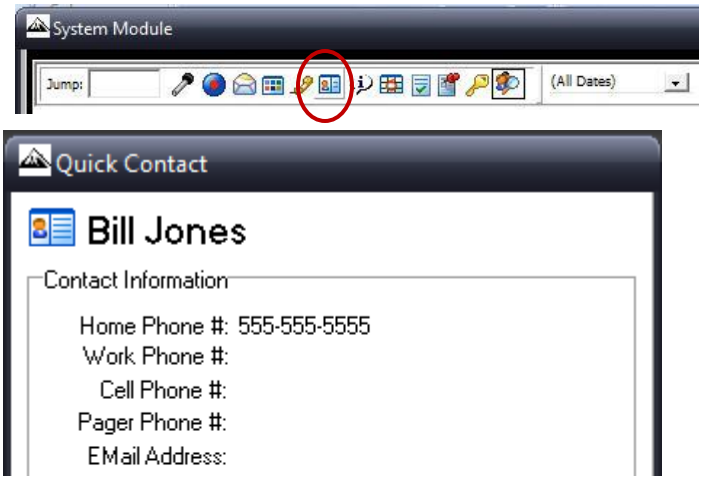

## Phonebook

"One-Click" Access to the Company Phone Book allows Summ
includes Insurers, Vendors, Rental Car Companies, and other



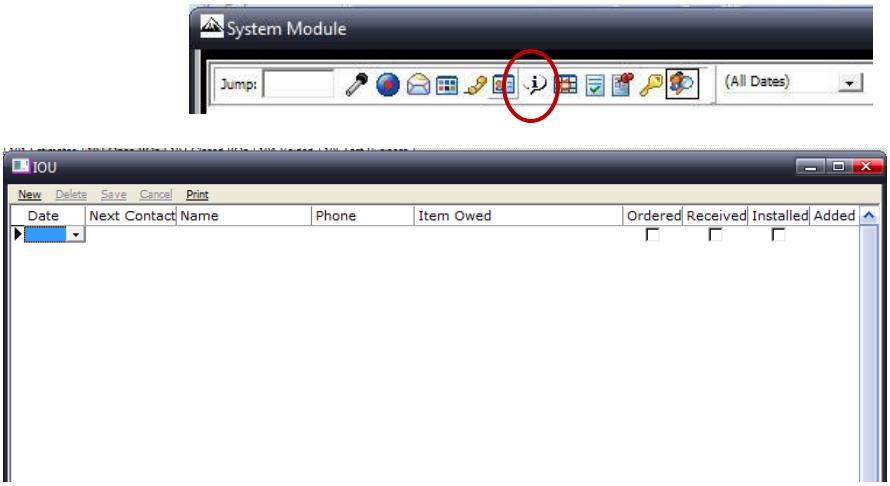
## Quick Contact

"One-Click" Access to the RO Specific Contact Information allows Summit users to access details such as: contact Customer, Insurer and Rental Car information on a specific RO. This option also allows you to send a direct e-mail to anyone of these constituents.



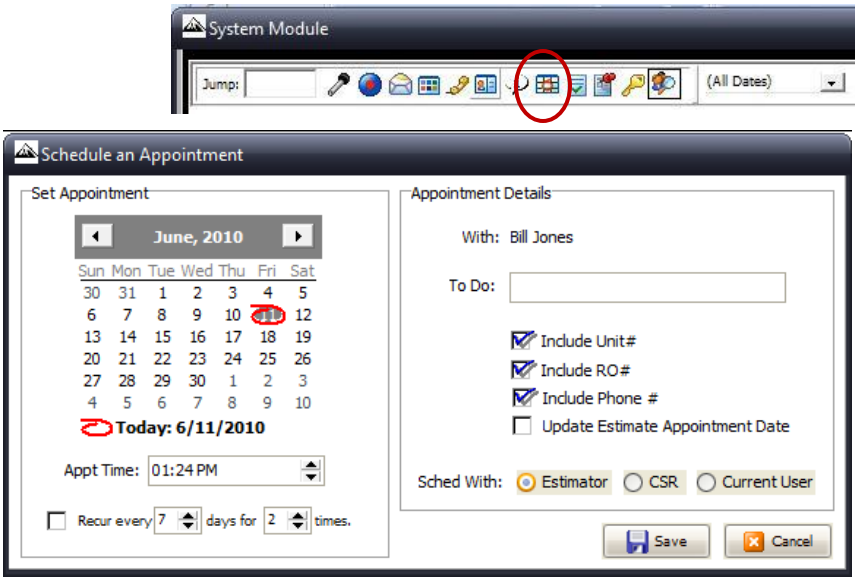

## IOU

"One-Click" Access to the RO Specific IOU Information allows Summit users to access and enter IOU information for a specific repair order. This information is then sent to the Appointment F/U Calendar as well as an Outstanding IOU report.

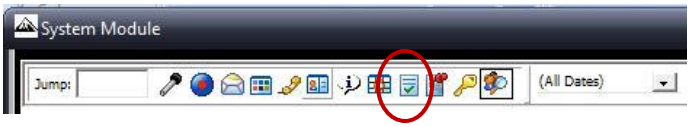



## Schedule an Appointment

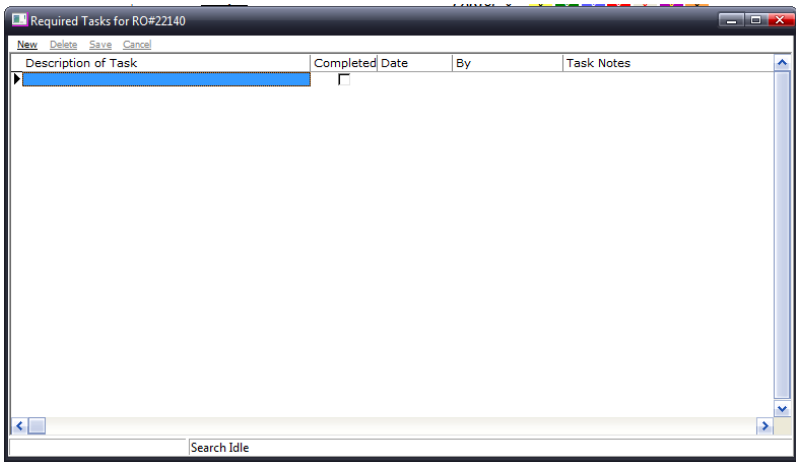
"One-Click" Access to RO Specific Action Appointments allows Summit users to access and enter specific actions, appointments, contacts, and other reminder information on a particular repair order.



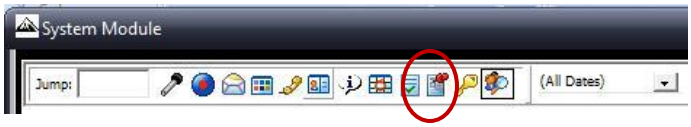
## Compliance Tasklist



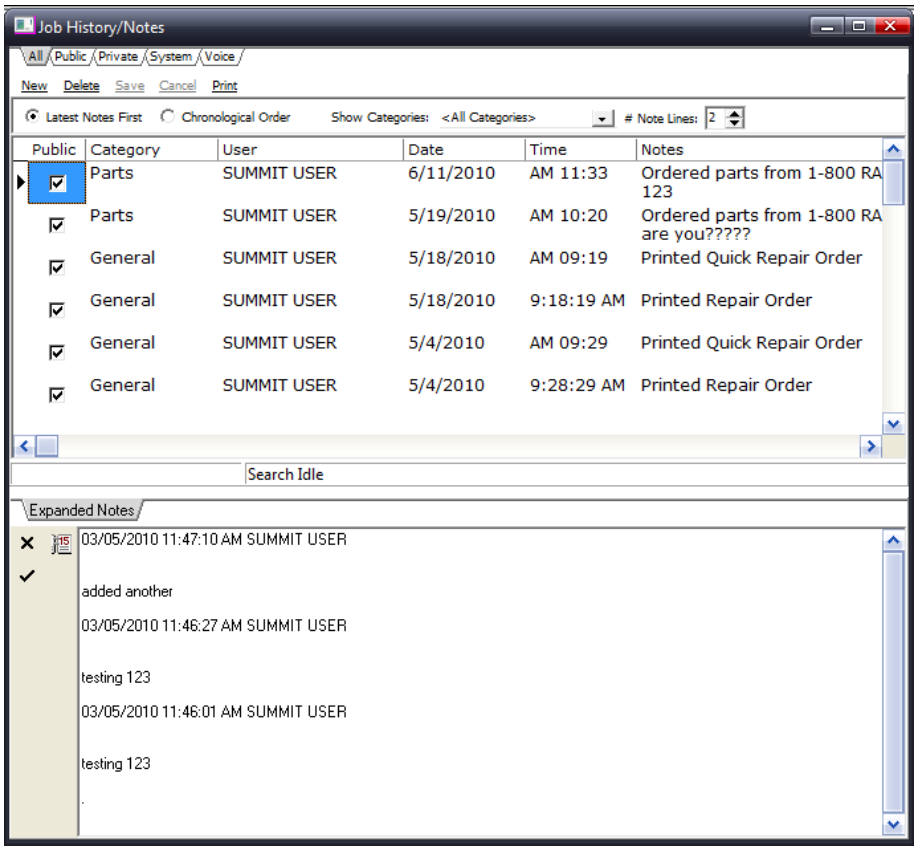

"One-Click" Access to RO Specific Compliance Tasks and Rules allows Summit users to access, monitor, and update Required Tasks or Compliance Rules associated with the Insurer or Fleet Account for this Repair Order. This helps repairers meet/exceed any and all tasks that are required as part of a business relationship with an insurance company or fleet customer. If there are tasks associated with an RO the RO CANNOT be closed unless the tasks are marked as completed.




## Job History/Notes



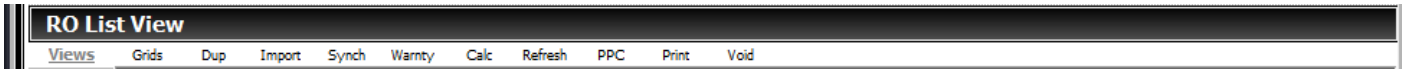

"One-Click" Access to RO Specific Job History/Notes allows Summit users to access, monitor, and update any and all activities that have occurred on any Repair Order. Summit automatically documents all actions that occur in the system so you have a detailed audit trail for you and anyone else that requests one.



# RO List Icons

Summit RO List ICONS provide you with several controls and actions designed to help you better manage all aspects of the RO Creation and Management Process. Your Options are as follows:

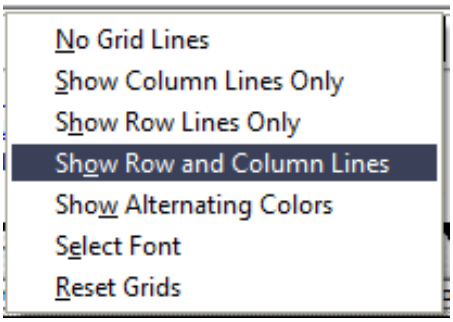
- Grids, Fonts, and Color Controls
- Create a Duplicate Estimate from Existing Estimate/RO
- Import an Estimate
- Synchronize an Existing Estimate/RO with a Revised Estimate in your Estimating System
- Create a Warranty RO
- Calculate the Existing RO
- Refresh Your Workstation
- Send Part Price Changes Back to your Estimating Systems
- Print RO List Reports
- Void Selected RO's




## Grids Fonts and Color Controls

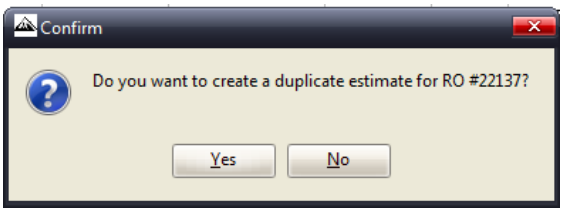
Grids, Fonts, and Color Controls ICON provide you with complete control over how you want to view the grids throughout your Summit Software.

NOTE: This is workstation specific. NOT user specific.




## Duplicate Estimate

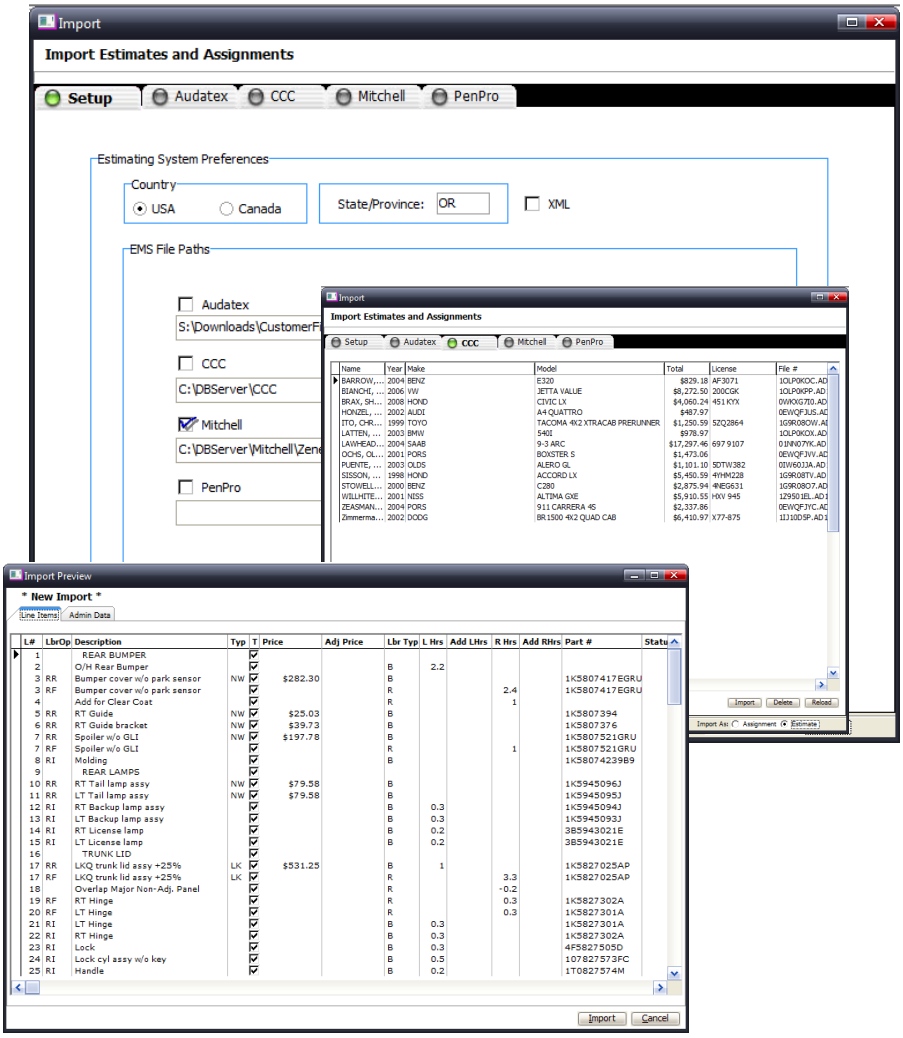
Create a Duplicate Estimate from Existing Estimate/RO ICON allows you to easily create a new estimate from the Administrative data within an existing RO.



## Importing an Estimate

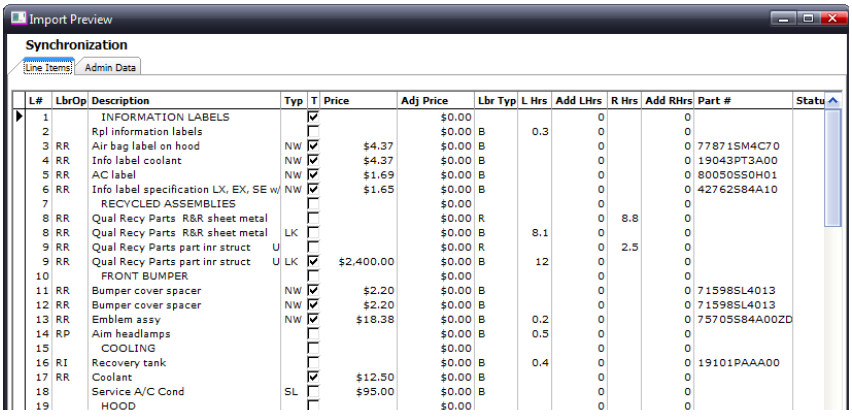
Import an Estimate ICON allows you to import an assignment OR estimate into Summit from the following estimating systems and web sites:

- ADP Shoplink US and Canada
- CCC Pathways
- Mitchell Ultramate US and Canada
- Pen Pro – British Columbia Canada



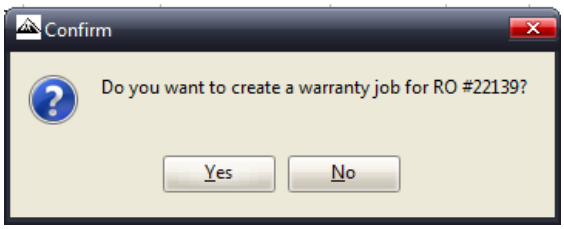

## Synchronize an Estimate

Synchronize an Existing Estimate / RO with a Revised Estimate in your Estimating System insures your estimating system and management system RO are "in sync" with regards to pricing.



## Warranty

Create a Warranty RO from Existing Estimate / RO ICON allows you to easily create a Warranty RO from the Administrative data within an existing RO. All Warranty RO's include a .9 at the end of the original RO#.

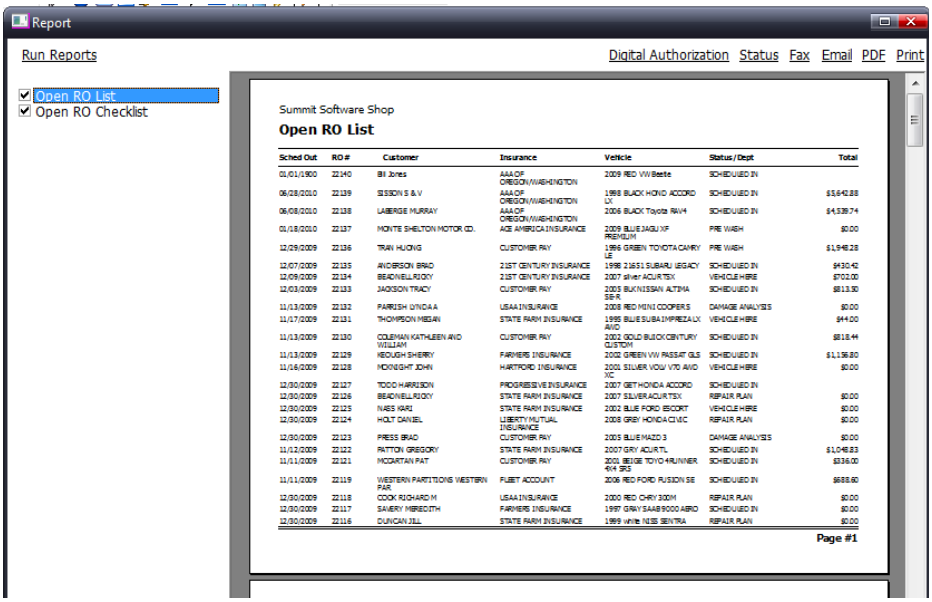



## Part Price Changes

Send Part Price Changes Back to your Estimating Systems ICON allows a Summit user to send any Parts Price Increases OR Decreases back to their estimating system of choice. Simply "click" on the lines you want to send back to the estimating system and the *Send PPC's* box, at the bottom of the screen, and the PPC's will be added to your estimating system as a supplement.

## Print RO List

Print RO List Reports ICON allows Summit Users to print two (2) reports from the RO List.



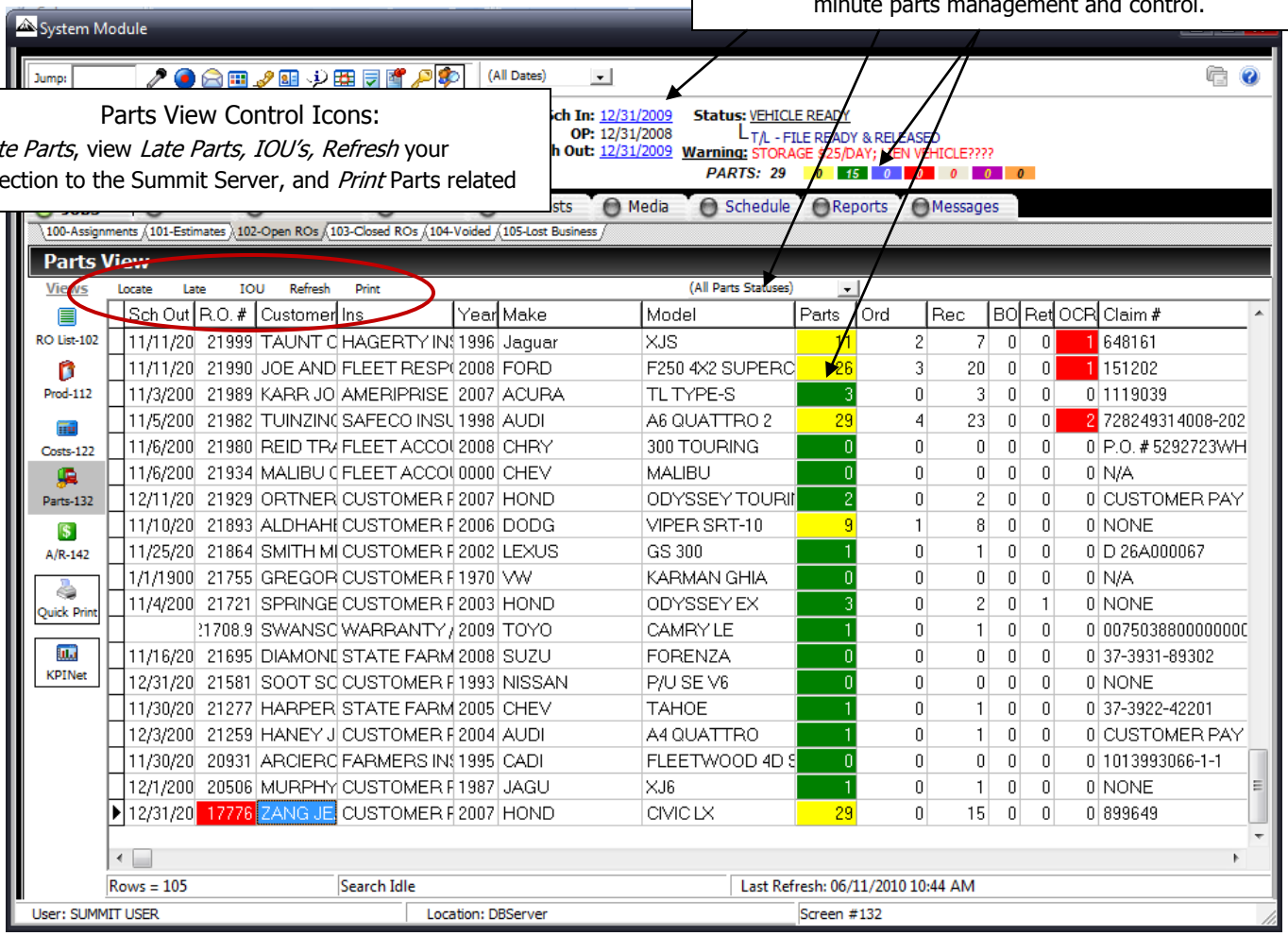
# The Summit Parts View

## Overview

The Summit Parts View has been designed to provide your collision repair facility with the easiest, yet most complete parts management system available.

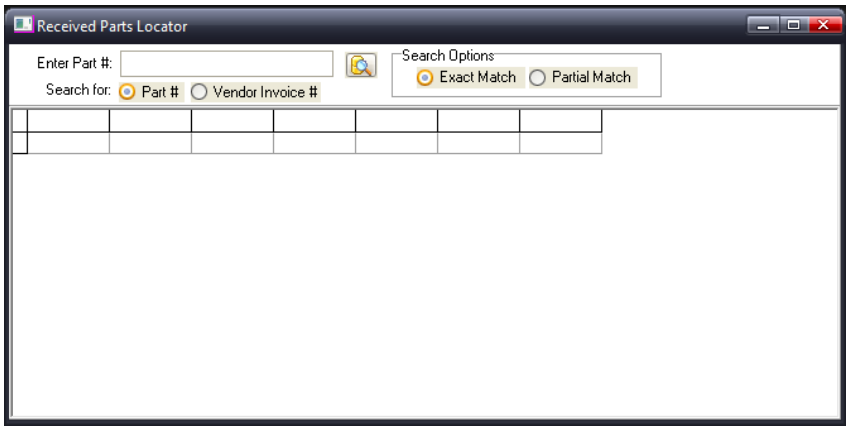
*Scheduled In and Out Dates, Parts Status Filters*, combined with Color Coded Parts Statuses insures accurate, up to the minute parts management and control.

Parts View Control Icons:
*Locate Parts*, view *Late Parts, IOU's, Refresh* your connection to the Summit Server, and *Print* Parts related



## Parts View Icons

### Locate

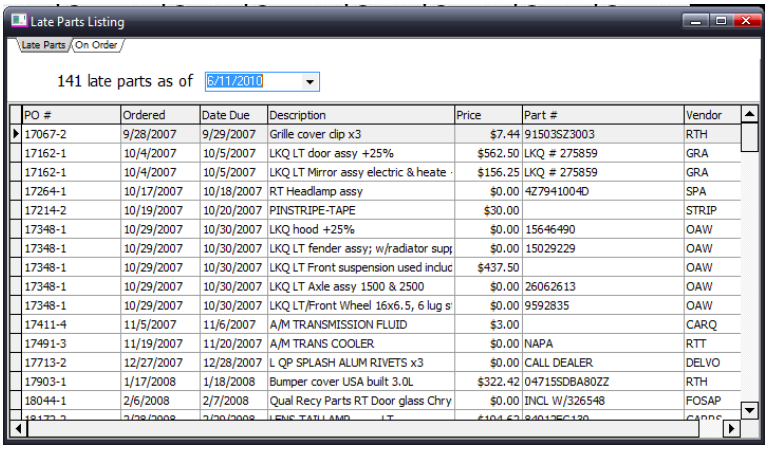



To Locate Parts that you have on an RO or have received from a vendor:

"Click on" the Locate ICON and Summit will launch the search screen below.
2. Enter in the part # or Vendor Invoice # and Summit will display the RO#, Vendor Code, Vendor Invoice #, Part #, Cost, and Description.

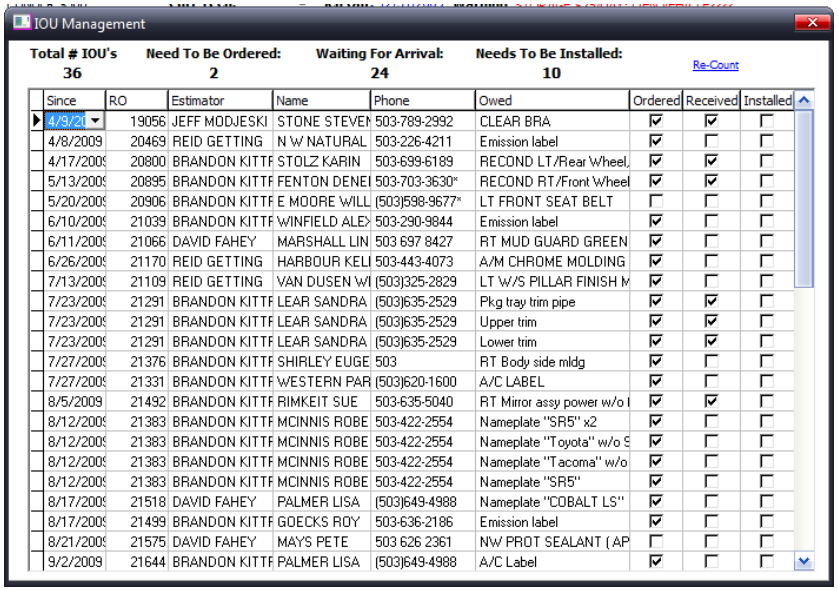
Please be aware that to locate a part the part # or invoice number MUST BE an exact match

### Late Parts




| PO # | Ordered | Date Due | Description | Price | Part # | Vendor |
|---|---|---|---|---|---|---|
| 17067-2 | 9/28/2007 | 9/29/2007 | Grille cover clip x3 | $7.44 | 91503SZ3003 | RTH |
| 17162-1 | 10/4/2007 | 10/5/2007 | LKQ LT door assy +25% | $562.50 | LKQ # 275859 | GRA |
| 17162-1 | 10/4/2007 | 10/5/2007 | LKQ LT Mirror assy electric & heate | $156.25 | LKQ # 275859 | GRA |
| 17264-1 | 10/17/2007 | 10/18/2007 | RT Headlamp assy | $0.00 | 4Z7941004D | SPA |
| 17214-2 | 10/19/2007 | 10/20/2007 | PINSTRIPE-TAPE | $30.00 | | STRIP |
| 17348-1 | 10/29/2007 | 10/30/2007 | LKQ hood +25% | $0.00 | 15646490 | OAW |
| 17348-1 | 10/29/2007 | 10/30/2007 | LKQ LT fender assy; w/radiator supp | $0.00 | 15029229 | OAW |
| 17348-1 | 10/29/2007 | 10/30/2007 | LKQ LT Front suspension used incluc | $437.50 | | OAW |
| 17348-1 | 10/29/2007 | 10/30/2007 | LKQ LT Axle assy 1500 & 2500 | $0.00 | 26062613 | OAW |
| 17348-1 | 10/29/2007 | 10/30/2007 | LKQ LT/Front Wheel 16x6.5, 6 lug s | $0.00 | 9592835 | OAW |
| 17411-4 | 11/5/2007 | 11/6/2007 | A/M TRANSMISSION FLUID | $3.00 | | CARQ |
| 17491-3 | 11/19/2007 | 11/20/2007 | A/M TRANS COOLER | $0.00 | NAPA | RTT |
| 17713-2 | 12/27/2007 | 12/28/2007 | L QP SPLASH ALUM RIVETS x3 | $0.00 | CALL DEALER | DELVO |
| 17903-1 | 1/17/2008 | 1/18/2008 | Bumper cover USA built 3.0L | $322.42 | 04715SDBA80ZZ | RTH |
| 18044-1 | 2/6/2008 | 2/7/2008 | Qual Recy Parts RT Door glass Chry | $0.00 | INCL W/326548 | FOSAP |

### IOU's



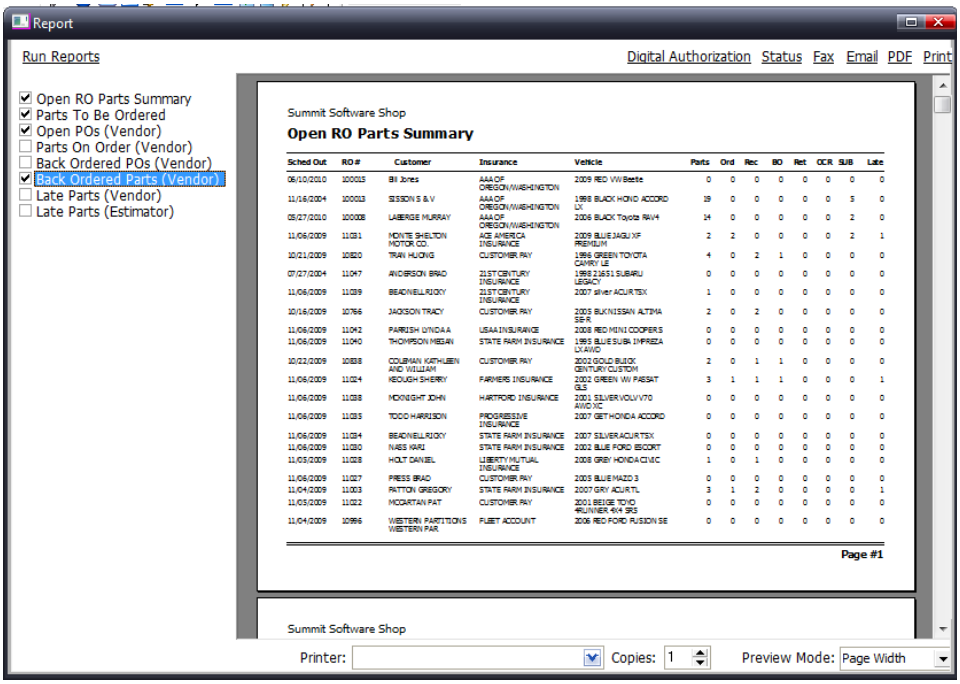

| Since | RO | Estimator | Name | Phone | Owed | Ordered | Received | Installed |
|---|---|---|---|---|---|---|---|---|
| 4/9/20 | 19056 | JEFF MODJESKI | STONE STEVEN | 503-789-2992 | CLEAR BRA | ☑ | ☑ | ☐ |
| 4/8/2009 | 20469 | REID GETTING | N W NATURAL | 503-226-4211 | Emission label | ☑ | ☐ | ☐ |
| 4/17/200 | 20800 | BRANDON KITTF | STOLZ KARIN | 503-699-6189 | RECOND LT/Rear Wheel, | ☑ | ☑ | ☐ |
| 5/13/200 | 20895 | BRANDON KITTF | FENTON DENEI | 503-703-3630* | RECOND RT/Front Wheel | ☑ | ☑ | ☐ |
| 5/20/200 | 20906 | BRANDON KITTF | E MOORE WILL | (503)598-9677* | LT FRONT SEAT BELT | ☐ | ☐ | ☐ |
| 6/10/200 | 21039 | BRANDON KITTF | WINFIELD ALEX | 503-290-9844 | Emission label | ☑ | ☐ | ☐ |
| 6/11/200 | 21066 | DAVID FAHEY | MARSHALL LIN | 503 697 8427 | RT MUD GUARD GREEN | ☑ | ☐ | ☐ |
| 6/26/200 | 21170 | REID GETTING | HARBOUR KELI | 503-443-4073 | A/M CHROME MOLDING | ☑ | ☐ | ☐ |
| 7/13/200 | 21109 | REID GETTING | VAN DUSEN WI | (503)325-2829 | LT W/S PILLAR FINISH M | ☑ | ☐ | ☐ |
| 7/23/200 | 21291 | BRANDON KITTF | LEAR SANDRA | (503)635-2529 | Pkg tray trim pipe | ☑ | ☑ | ☐ |
| 7/23/200 | 21291 | BRANDON KITTF | LEAR SANDRA | (503)635-2529 | Upper trim | ☑ | ☑ | ☐ |
| 7/23/200 | 21291 | BRANDON KITTF | LEAR SANDRA | (503)635-2529 | Lower trim | ☑ | ☑ | ☐ |
| 7/27/200 | 21376 | BRANDON KITTF | SHIRLEY EUGE | 503 | RT Body side mldg | ☑ | ☐ | ☐ |
| 7/27/200 | 21331 | BRANDON KITTF | WESTERN PAR | (503)620-1600 | A/C LABEL | ☑ | ☐ | ☐ |
| 8/5/2009 | 21492 | BRANDON KITTF | RIMKEIT SUE | 503-635-5040 | RT Mirror assy power w/o l | ☑ | ☑ | ☐ |
| 8/12/200 | 21383 | BRANDON KITTF | MCINNIS ROBE | 503-422-2554 | Nameplate "SR5" x2 | ☑ | ☐ | ☐ |
| 8/12/200 | 21383 | BRANDON KITTF | MCINNIS ROBE | 503-422-2554 | Nameplate "Toyota" w/o S | ☑ | ☐ | ☐ |
| 8/12/200 | 21383 | BRANDON KITTF | MCINNIS ROBE | 503-422-2554 | Nameplate "Tacoma" w/o | ☑ | ☐ | ☐ |
| 8/12/200 | 21383 | BRANDON KITTF | MCINNIS ROBE | 503-422-2554 | Nameplate "SR5" | ☑ | ☐ | ☐ |
| 8/17/200 | 21518 | DAVID FAHEY | PALMER LISA | (503)649-4988 | Nameplate "COBALT LS" | ☑ | ☐ | ☐ |
| 8/17/200 | 21499 | BRANDON KITTF | GOECKS ROY | 503-636-2186 | Emission label | ☑ | ☐ | ☐ |
| 8/21/200 | 21575 | DAVID FAHEY | MAYS PETE | 503 626 2361 | NW PROT SEALANT ( AP | ☐ | ☐ | ☐ |
| 9/2/2009 | 21644 | BRANDON KITTF | PALMER LISA | (503)649-4988 | A/C Label | ☑ | ☐ | ☐ |

### IOU's

There are many situations where a collision repair facility delivers a vehicle that still needs a moulding, label, or other small part that is not crucial to the repair but still needs to be tracked and delivered to the customer. Summit's *IOU* tracking system provide collision repairers with an easy to use, proactive methodology to improve customer satisfaction and communications. To see what outstanding IOU's you have in your business simply "click on" the *IOU* icon and Summit will launch the IOU screen.

Print

By selecting the Print ICON in the Parts, Summit allows you to print the following reports.

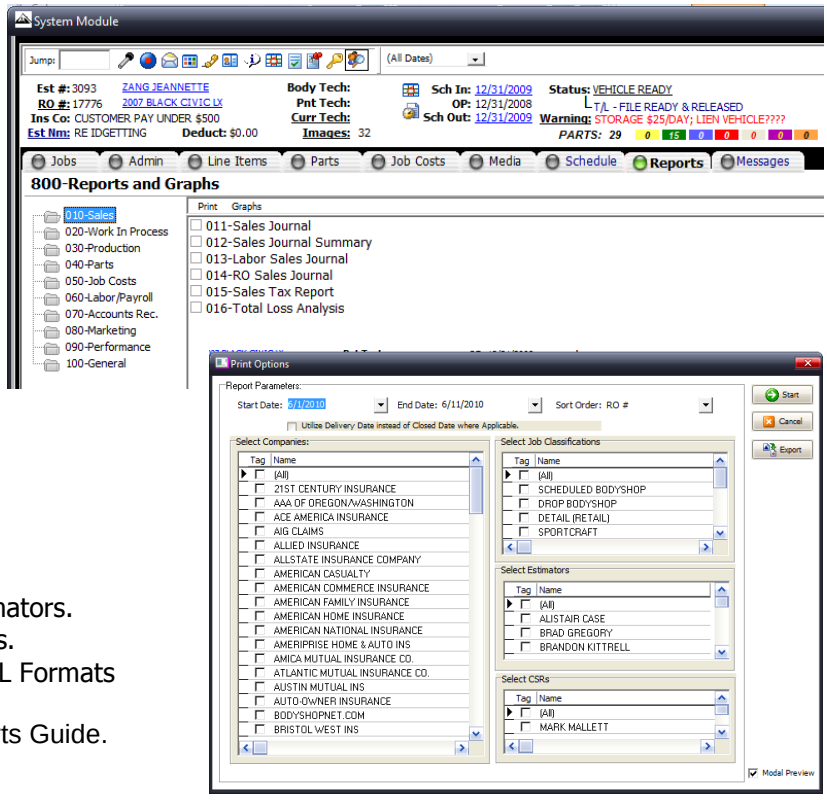



# Reports Options

## Reports Tab

Choose the Report Folder from which you'd like to print.

After selecting the report you want to produce, Summit's Reporting Engine provides you with dozens of options for creating Parts Management and Control reports. In the example below you have the following choices:




- Date Range.
- Sort Order.
- All or Individual Insurers.
- Combinations of Repair Classifications.
- All, Individual, or Combinations of Estimators.
- All, Individual, or Combinations of CSR's.
- Export to CSV, Txt, Excel, XML, or HTML Formats

For more information on Reports see our Reports Guide.