



SUMMITCRS  
COLLISION REPAIR SYSTEMS

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**Terminal Training & Reference Guide**

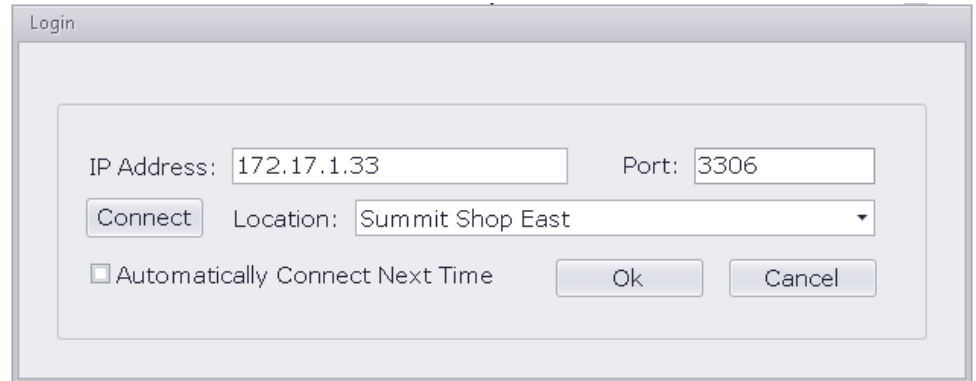
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## **SummitCRS Terminal:**

Designed with the idea of operating like an Airport Terminal sharing data from your open RO's throughout all Production Departments. Terminal provides real-time access to your SummitCRS data acting like an automatically updated Production Meeting on your shop floor ALL DAY LONG. Easily communicate production critical data to any workstation on your network. Terminal is only compatible with SummitCRS 8.

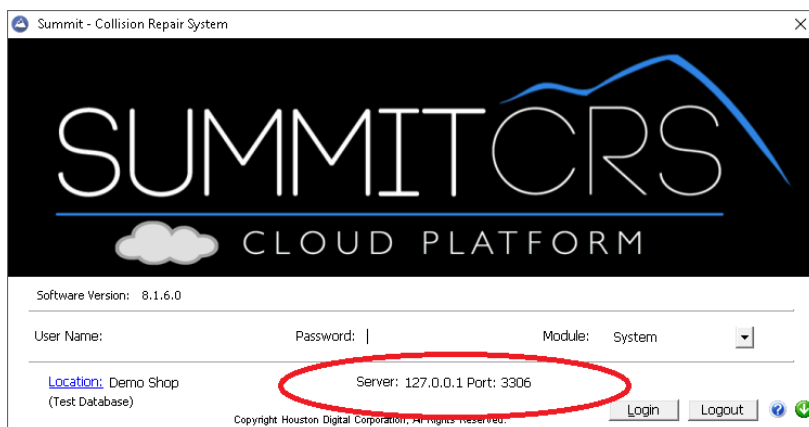
### **Setup:**

To set up Terminal, simply click on the shortcut icon and an initial set up screen will appear. You will need to enter your server IP and Port number then press connect to select your location. Check the "Automatically Connect Next Time" box to have Terminal skip this step the next time you open Terminal on the workstation.



The screenshot shows a 'Login' dialog box with the following fields and controls:

- IP Address: 172.17.1.33
- Port: 3306
- Connect button
- Location: Summit Shop East (dropdown menu)
- Automatically Connect Next Time
- Ok button
- Cancel button



***\*\*You can find your Summit Server IP and Port by viewing your SummitCRS login screen.\*\****

## Terminal Main Screen:

When you open Terminal, it will show all of your Open ROs as they exist in the Summit System. You can easily full screen Terminal in Kiosk mode by hitting "M" on your keyboard to maximize Terminal's use of screen space.

* RO #	Department	Cycle Hours	Sch	D	Year	Make	Model	Outstanding Parts	BT	BL	RT	RL	MT	ML	Ttl Hrs	FH
17859	PAINT	70:02	09/12	TU	2014	Nissan	Sentra	Qtr Glass Adhesive	MLO	27.40	FR	20.00	BCTE	1.00	48.40	19.50
17873	PAINT	73:19	09/13	W	2017	Ford	Explorer	Liftgate Glass Adhesive	MLO	11.30	FR	11.10	BCTE	1.00	23.40	12.30
17874	PAINT	3:06	09/13	W	2014	Dodge	Charger	-	DAM	8.50	FR	7.00	BCTE	2.00	17.50	3.90
17879	PAINT	73:19	09/13	W	2015	Honda	Accord	-	ED	5.20	FR	7.80	BCTE	1.00	14.00	4.90
17863	PAINT	101:59	09/15	F	2015	Nissan	Sentra	Rear Bumper Energy Absorber Rear Bumper Reinforcement Bar	MLO	16.40	FR	11.60	BCTE	1.00	33.00	14.70
17867	PAINT	76:20	09/15	F	2006	Toyota	Camry	-	MLO	11.00	FR	13.50	BCTE	1.00	25.50	9.80
17832	PAINT	123:03	09/18	M	2017	Volkswage	Jetta	-	BCTE	1.50	FR	1.60		0.00	3.10	1.00
17832	PAINT	102:26	09/18	M	2017	Volkswage	Jetta	R Ctr Pillar Applique	MLO	11.00	FR	9.30		1.00	21.30	6.70
17811	PAINT	4:12	09/21	TH	2016	Nissan	Altima	-	ED	46.20	FR	22.20	BCTE	1.00	71.40	31.00
17864	PAINT	70:08	09/26	TU	2011	Toyota	RAV4	Frnt Body Side Mldg Set	ED	34.10	FR	25.80	BCTE	1.00	60.90	19.90
17762	REASSEMBLY	262:27	09/11	M	2016	Honda	Fit	-	ED	48.70	FR	23.10	ED	2.60	77.40	55.60
17846	REASSEMBLY	71:40	09/11	M	2005	Toyota	Tacoma	Rear Bumper Cover Rear Bumper Step Pad R Rear Bumper Step Pad Extension L Rear Bumper Step Pad Extension R Rear Inr Bumper Mounting Arm L Rear Inr Bumper Mounting Arm R Rear Bumper Reinforcement L Rear Bumper Reinforcement Rear Bumper Reinforcement Bar	MLO	15.20	FR	8.40	BCTE	1.00	33.60	22.50

## Sorting Terminal:

Terminal allows for multiple Parent-Child Sorts within its grid. Apply your first sort by clicking the desired column header you want to sort, the first click sorts A-Z 0-9, the second Z-A 9-0. To add a child sort simply Shift-Click the additional column header you would like to apply the secondary sort to. You can tell where your Sorts are by the triangle sort icon next to the Column Header.

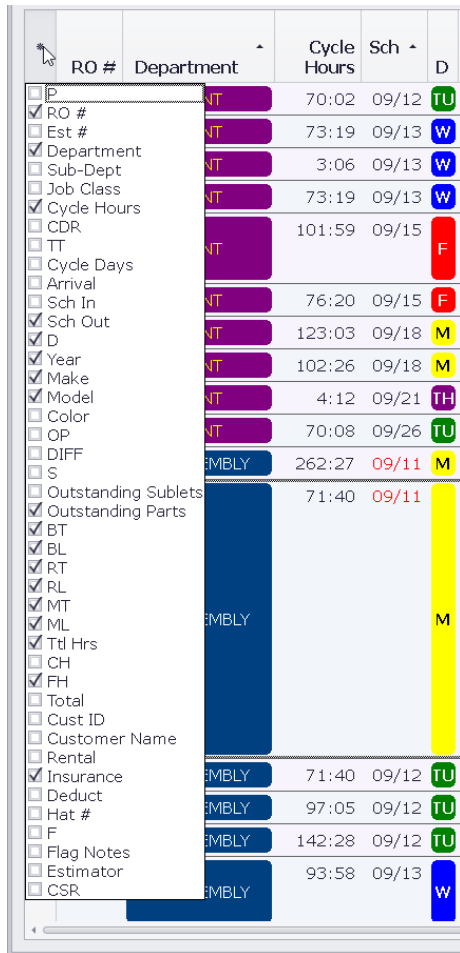
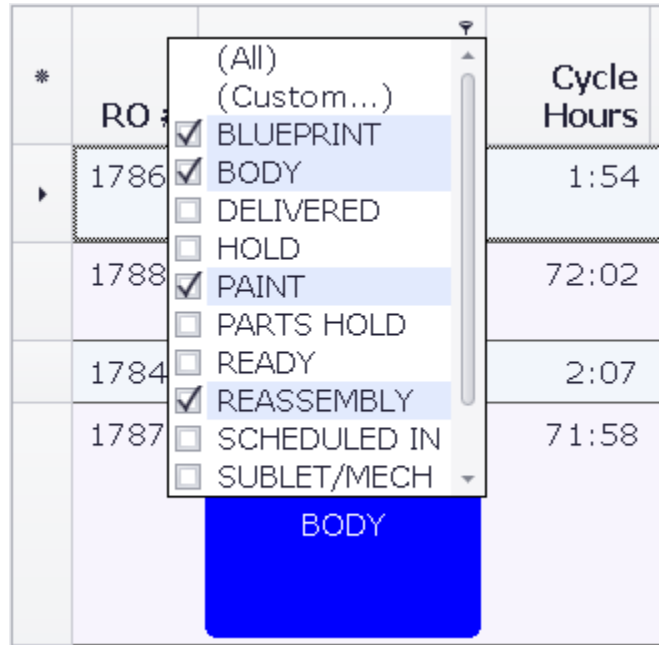
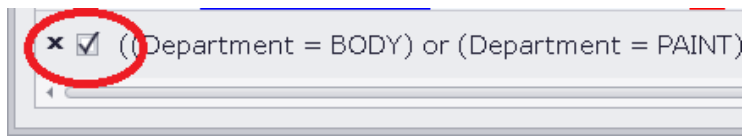
**\*\*We recommend applying your first sort to the Department to put your ROs into the production order, then the child sort to Sch Out so that ROs scheduled out sooner will appear at the top of the Department List.\*\***

* RO #	Department	Cycle Hours	Sch	D	Year
17832	PAINT	123:29	09/18	M	2017
17832	PAINT	102:53	09/18	M	2017
17811	PAINT	4:38	09/21	TH	2016
17864	PAINT	70:34	09/26	TU	2011
17762	REASSEMBLY	262:53	09/11	M	2016
17846	REASSEMBLY	72:06	09/11	M	2005
17827	REASSEMBLY	72:06	09/12	TU	2016

**Filtering Terminal:**

With Terminal we can filter any of our column headers and apply multiple filters. To apply a filter to a column locate the filter icon in the top right of the column header and click it. The filter window will open and you can select what items you want to filter by from the list or select Custom to create your own filter parameters. Terminal Allows for unlimited Filters and will display any active filters at the bottom of the Terminal Window unless Kiosk Mode is Enabled.

You can remove all filters by clicking the 'X' on the far left of the filter bar at the bottom of the Terminal Window.



**Setting up the Grid:**

Terminal is a workstation based application which means any settings we create or grid preferences we edit will only affect the workstation upon we made the edit for. It is recommended to set up Terminal on one workstation the way you want it to be then copy that C:/Summit/Terminal folder to each workstation we want terminal added to thereafter preformatted and ready to run.

To Add/Remove Column headers we want to click on the '\*' Located at the top left of the Terminal Grid. This will reveal our Column List which will show us all available Terminal Columns as well as the order in which our grid is in. From this drop-down we can check or uncheck each item as we see fit, we can also drag column names into different orders in the list and this change will reflect in the grid.

***\*\*We are able to lock the grid in Terminal Preferences under the Grid Tab to protect sensitive information from being displayed. Terminal Preferences can be password protected.\*\****

***\*\* You can install and set up multiple "Terminals" displaying different datasets depending on your needs for each department in your shop.\*\****

## Preferences:

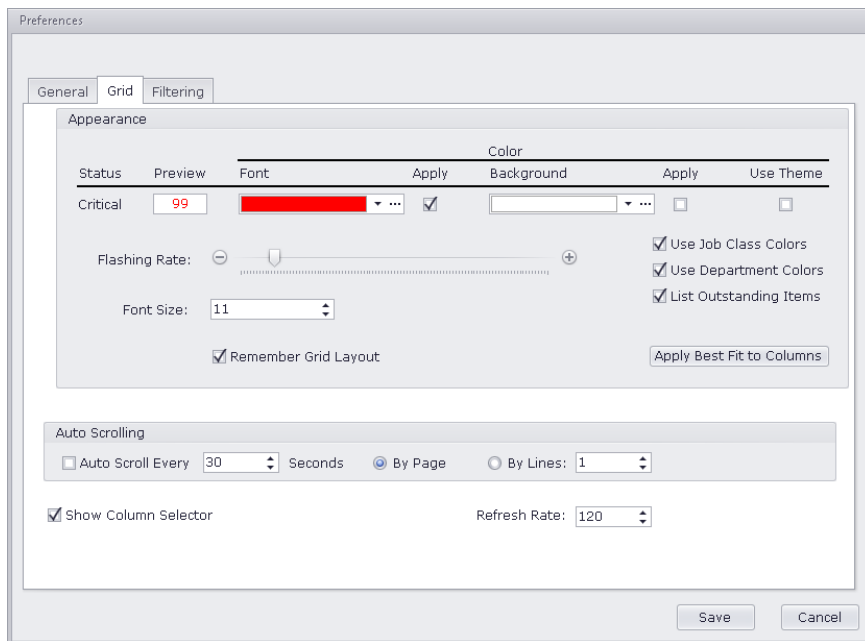
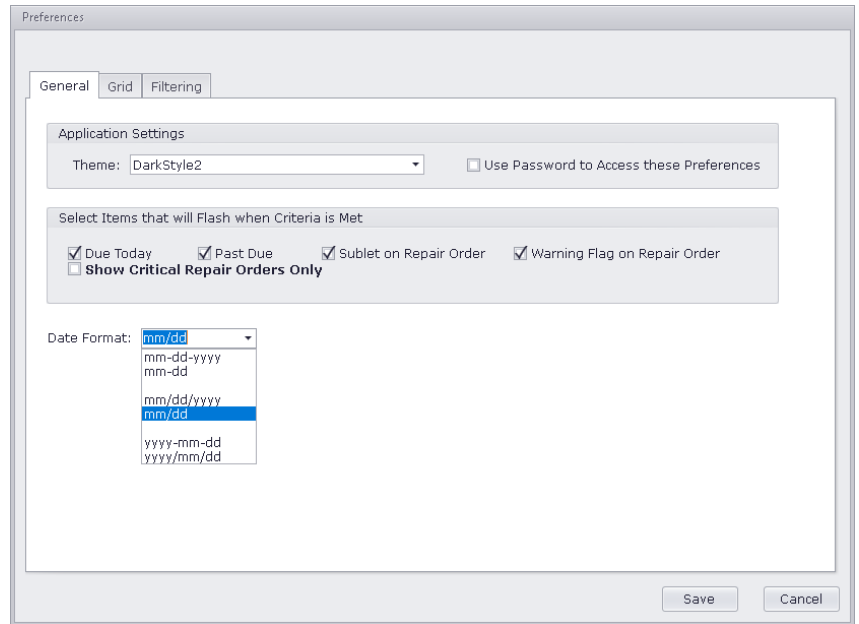
Terminal's Preferences can be accessed by clicking Preferences at the top left of the Terminal Window.

The General Tab allows us to change Terminal's themes for different looks to the application. Some themes are easier to view in sunlight than others.

By Checking the "Use Password to Access these preferences" Terminal will prompt the user for a password anytime they want to change preferences.

Terminal includes option flash points for Items Due Today, Past Due, Sublets & Warning Flags. Checking the boxes here will enable those items to flash in the Terminal Grid.

Date Format allows the user to select multiple date formats to save space in the Terminal Grid by not displaying the Year.



The Grid Tab includes a plethora of settings important to the look and feel of Terminal.

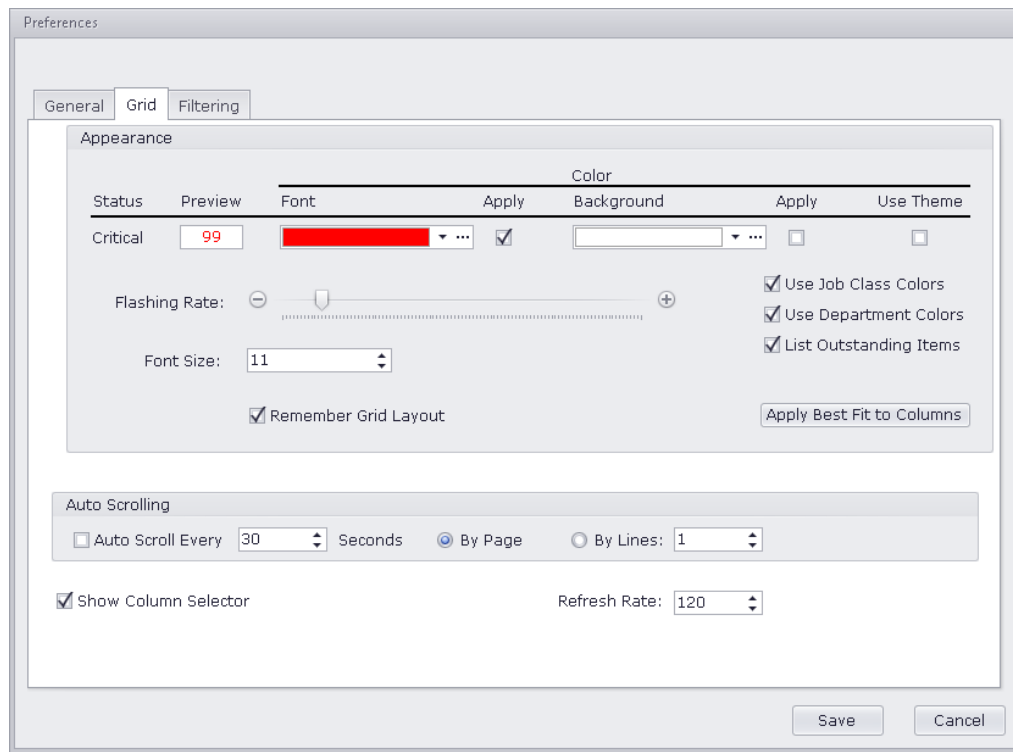
Appearance allows the user to change the color and background of items they selected as Flashpoints in the General Tab. As a default Terminal sets all flashpoints to be Red Text on the theme's default background, simply change the colors to what you want them to be and make sure the Apply box is checked otherwise they will not appear in the Terminal Grid as configured. **Warning:** Checking Use Theme will ignore any color settings and default those selections to the Theme selected in the General Tab.

Job Class and Department Colors will mirror your Summit Production scheme as to keep the familiar look in Terminal as is in Summit.

List Outstanding Items will put each Item on its own line in Terminal as opposed to Word Wrapping the text to fill the box. List view is easier to view but requires more screen space.

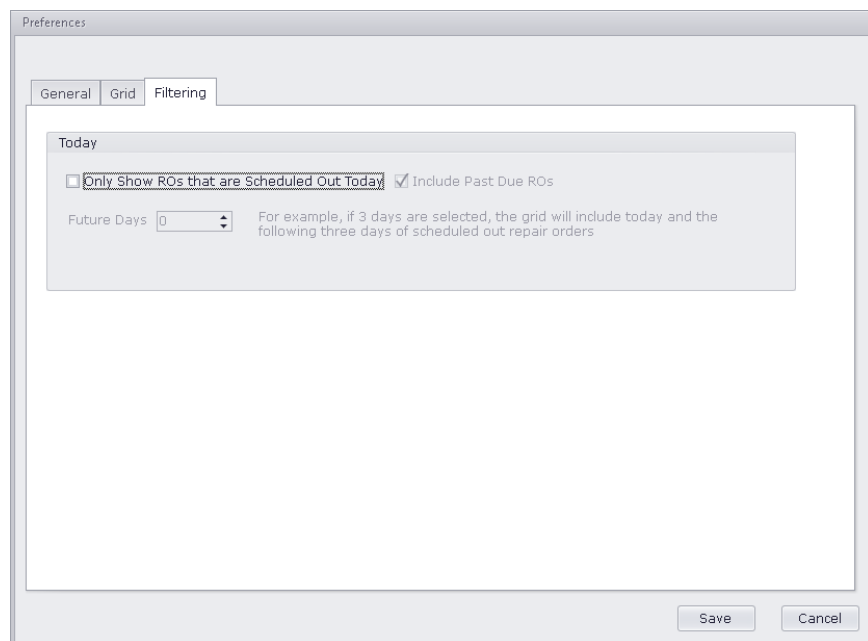
Start by clicking the “Apply Best Fit to Columns” button. This will resize your columns to fit all of your data without truncating information in the column width. You may use this as a starting point then manually make adjustments within the terminal window by clicking the edges of the columns to manually resize.

At the bottom of the Grids tab we have our Auto Scrolling settings. Here we can set how often we want Terminal to scroll as well as how we want it to scroll. Terminal gives us the option of scrolling by a variable number of lines or by full page of information as often as desired.



As mentioned earlier this is also where we located the “Show Column Selector” by unchecking this box the ‘\*’ will not appear in the grid and columns will not be allowed to be added or removed without access to the preferences.

Refresh Rate is how often Terminal will refresh its data from the Summit Server, as a default this is set to every two minutes.



The Filtering tab gives the user the ability to filter the RO list in terminal by what has a scheduled out date of the current day. The user then has the option to include Past Due ROs in the list.

Future Days allows the user to then include ROs that are scheduled out past today depending on the variable entered. For example if future days was set to 3 the RO list would include ROs scheduled out today and the next three days.

**Terminal Fields:**

<b>P</b>	Priority, this is edited in the Production Tab of Summit, allowing the shop to set a priority list for ROs in a department. Terminal can then Sort on this field to mirror that priority order.
<b>RO #</b>	The Repair Order number.
<b>EST #</b>	The Estimate Number.
<b>Department</b>	The current Production Department of the RO.
<b>Sub-Dept</b>	The current Sub Department of the RO.
<b>Job Class</b>	The Job Class
<b>Cycle Hours</b>	How long, HH:MM, the RO has been sitting in the current production department. <b>** Summit "Ascent" users will not be able to utilize cycle hours and cycle days**</b>
<b>Cycle Days</b>	How many days the RO has been sitting in the current production department <b>** Summit "Ascent" users will not be able to utilize cycle hours and cycle days**</b>
<b>CDR</b>	Calculated Days Remaining, the total RO hours divided by 4 hr Touch Time.
<b>TT</b>	Touch Time if vehicle was delivered today.
<b>Arrival</b>	Arrival Date of RO
<b>OP</b>	Original Promise Date
<b>Sch In</b>	The scheduled in date
<b>Sch Out</b>	The scheduled out date
<b>D</b>	Day of the week the scheduled out date is. (Monday, Tuesday....)
<b>DIFF</b>	Number of days difference between original promise date and scheduled out.
<b>Year</b>	Year of vehicle
<b>Make</b>	Make of vehicle
<b>Model</b>	Model of vehicle
<b>S</b>	Number of Sublets
<b>Outstanding Sublets</b>	Lists the descriptions of Sublet line items on the RO.
<b>Outstanding Parts</b>	Lists the descriptions of Parts that are On Order and not received.
<b>BT</b>	Assigned Body Tech
<b>RT</b>	Assigned Refinish Tech
<b>MT</b>	Assigned Mechanical Tech
<b>BL</b>	Total Body Labor on the RO
<b>RL</b>	Total Refinish Labor on the RO
<b>ML</b>	Total Mechanical Labor on the RO
<b>Ttl Hrs</b>	Total RO Labor Hours
<b>CH</b>	Total Time Clocked Labor Hours
<b>FH</b>	Total Flagged Labor Hours
<b>Total</b>	Job Total in \$
<b>Cust ID</b>	Customer ID
<b>Customer Name</b>	Customer Name
<b>Rental</b>	Rental Company
<b>Insurance</b>	Insurance Company
<b>Deduct</b>	Amount of Deductible
<b>Hat #</b>	Hat Tag #
<b>F</b>	Indicates if there are any present warning notes for the RO.
<b>Flag Notes</b>	Displays warning notes from Summit
<b>Estimator</b>	Assigned Estimator
<b>CSR</b>	Assigned CSR