SUMMITCRS
COLLISION REPAIR SYSTEMS

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www.summitcrs.net

ReportPro Training & Reference Guide

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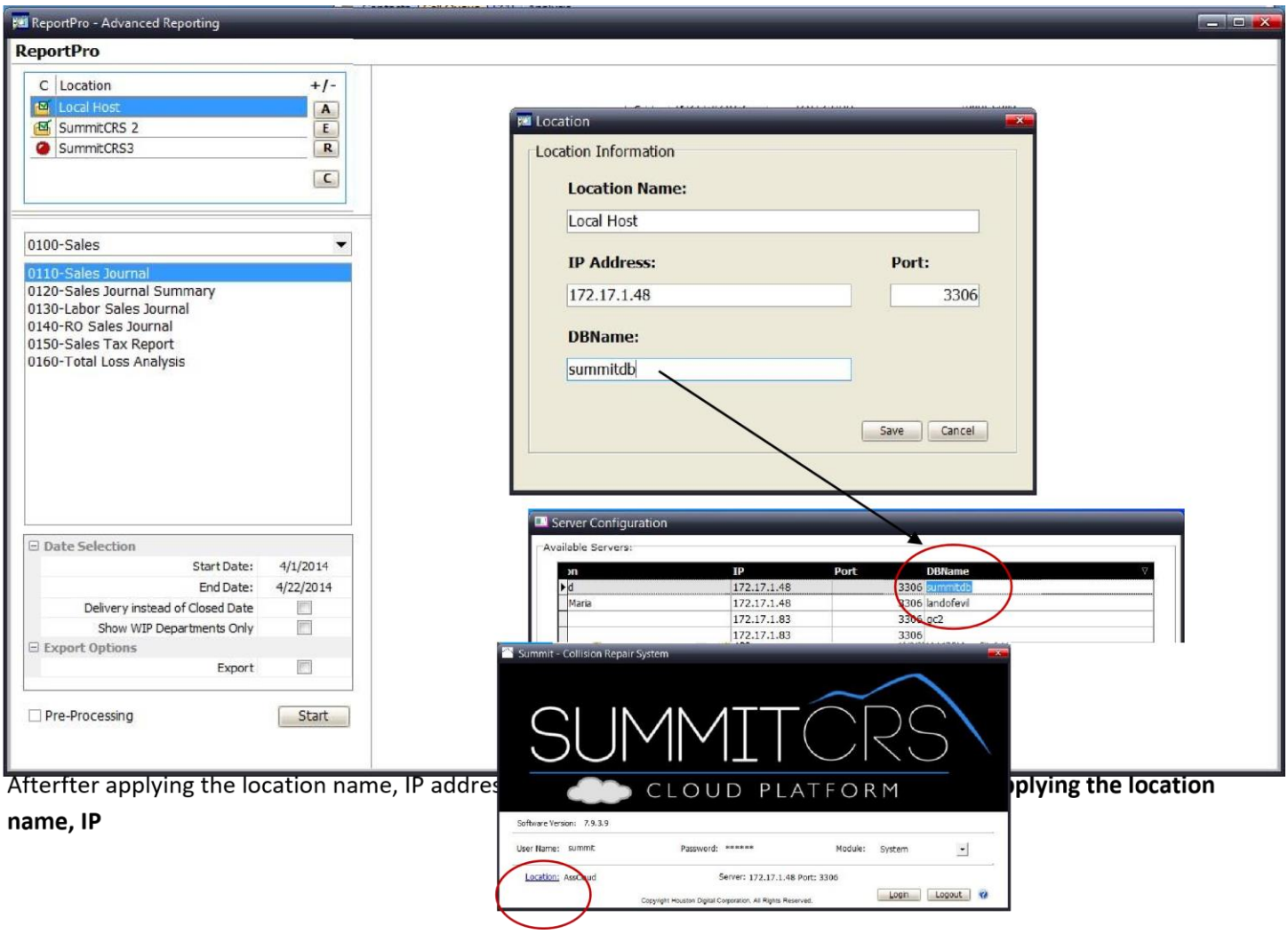
What Is Report Pro

ReportPro replaces the old reporting tab. ReportPro allows simple customization of reports to fit specific users needs allowing adding/removing columns and unlimited grouping and filtering. In short, it allows you to customize the current report list the way YOU want them. It can also be used as an MSO enabled advanced reporting system.

ReportPro generally mirrors the Reporting tab. Because of the flexibility in customizing reports, some reports have been combined.

Setting Up Report Pro

When you first log in to ReportPro, you will need to set your location(s). To do so, highlight “Local Host” click on the “E” for Edit and 1) Name the Location: and 2) Type in the IP Address and port that you see on the SummitCRS Login screen and the DBName that matches the DBName in the Summit client setup (this can be launched by clicking on the blue IP address on the login screen).



Afterfter applying the location name, IP addres **pplying the location name, IP**

Click save and then you can highlight the location name and click “C” for Click the (C) to connect. You will see the folder with a green checkmark on it that will indicate it is connected. If there is NOT a green check on the folder, the location is NOT active.

Report Pro Basics

The reports in Report Pro basically mirror the reports in SummitCRS screen 800. HOWEVER, ReportPro has additional functionality and flexibility.

"**A**" is to Add locations

"**E**" is to Edit locations

"**R**" is to Remove locations

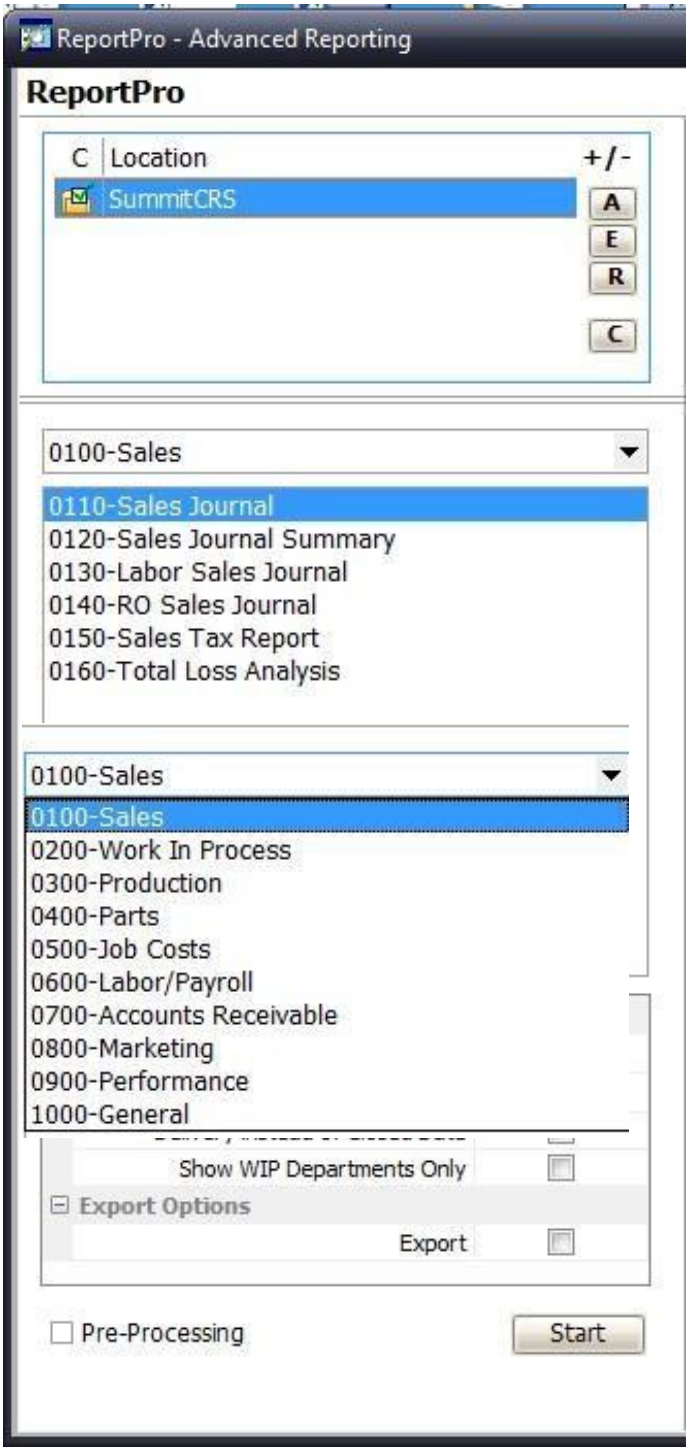
"**C**" is to Connect locations

The +/- allows you to Expand/Collapse the Location List (MSO feature)

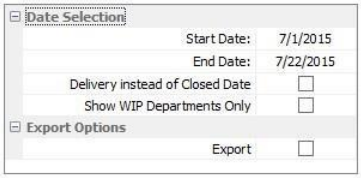
You can add additional locations by clicking the "A" and setting the Location, IP, and port and then clicking "C" to connect.

The Dropdown arrow allows you to choose from the list of "grouped" reports.

Simply choose the "group" and the reports inside will display below.



You can choose your dates by clicking on the actual date.

In ReportPro you can choose to run reports that are Closed Date driven instead by Delivery Date by checking box. **  a

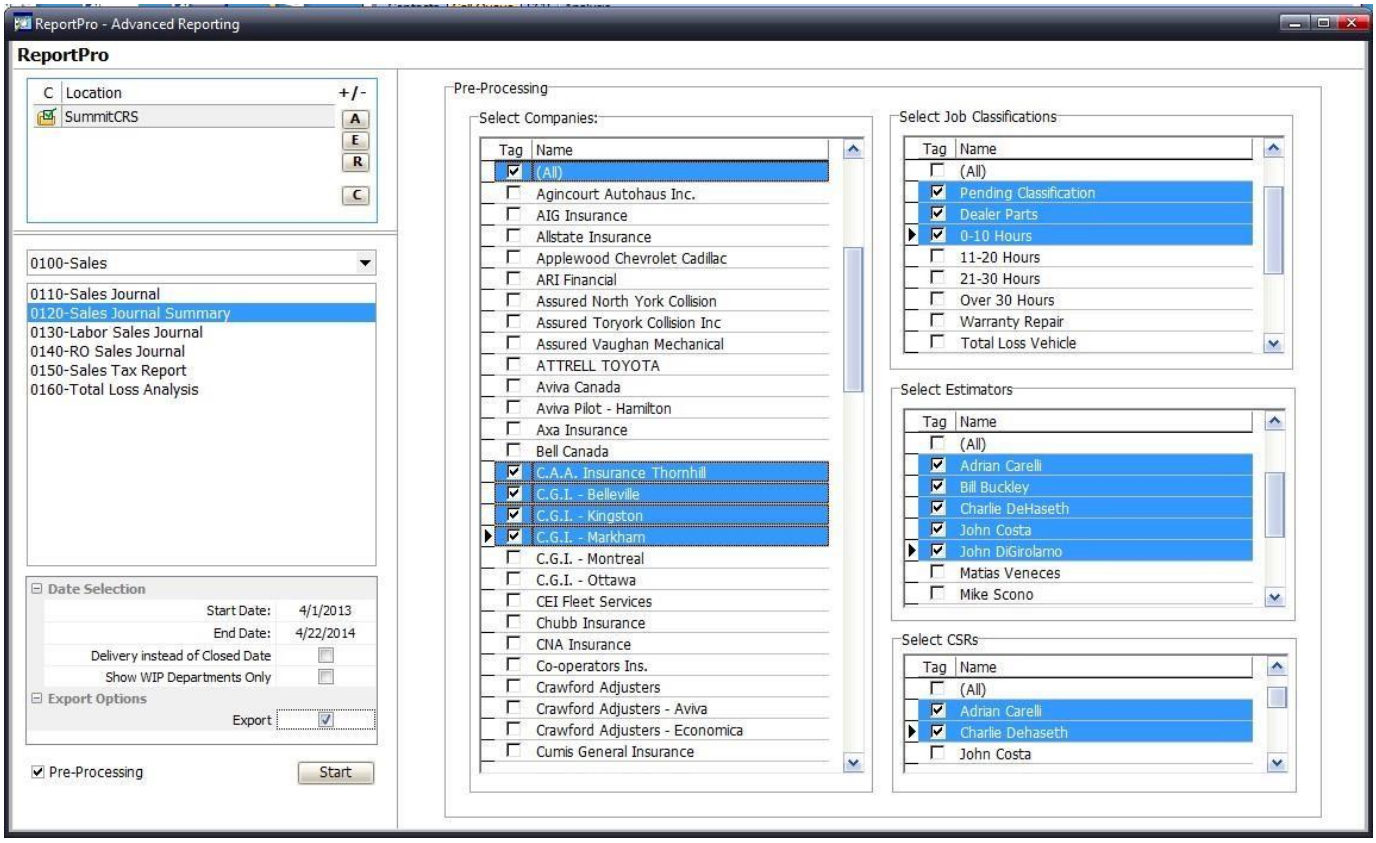
**NOTE: not all reports are Closed Date driven: here is a list: http://www.summitcrs.net/pdf/reportsguide.pdf

You can also filter by WIP Departments.

By checking the "Export" box you can choose to export the chosen report to: CSV, Txt, Excel, XML or HTML

Pre-Processing

By checking the Pre-Processing box prior to running a report it will launch the Pre-Processing screen that allows you to filter as you'd like prior to printing the chosen report.



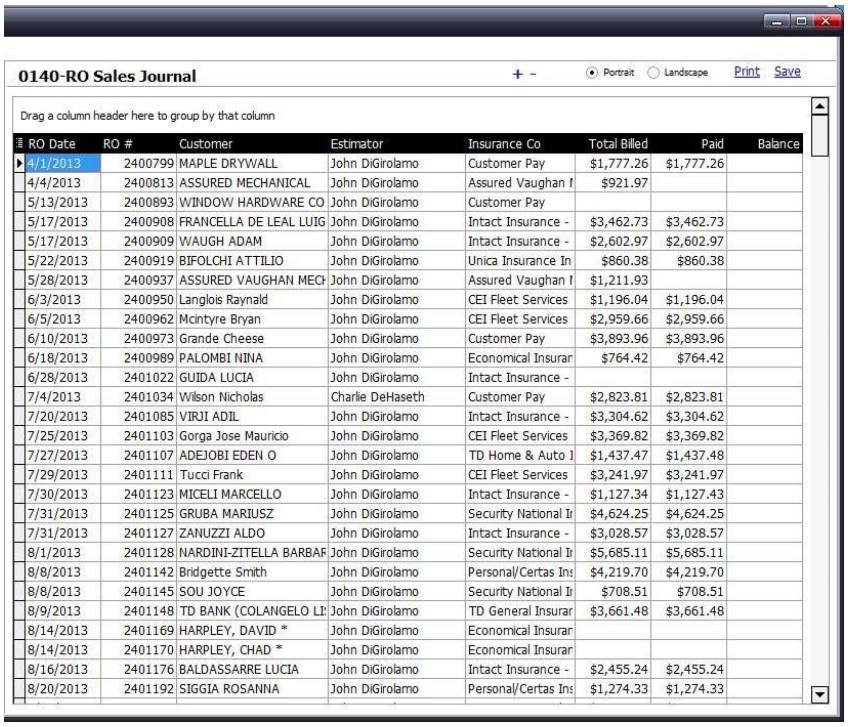
Then click "Start" to run your report

Report Pro Flexibility

ReportPro allows you to manipulate “standard” reports and customize those reports to your specific needs.

Grouping

You can “group” by clicking on and dragging a column header up in to the white space and then expand/collapse by clicking on the **+** or **-**

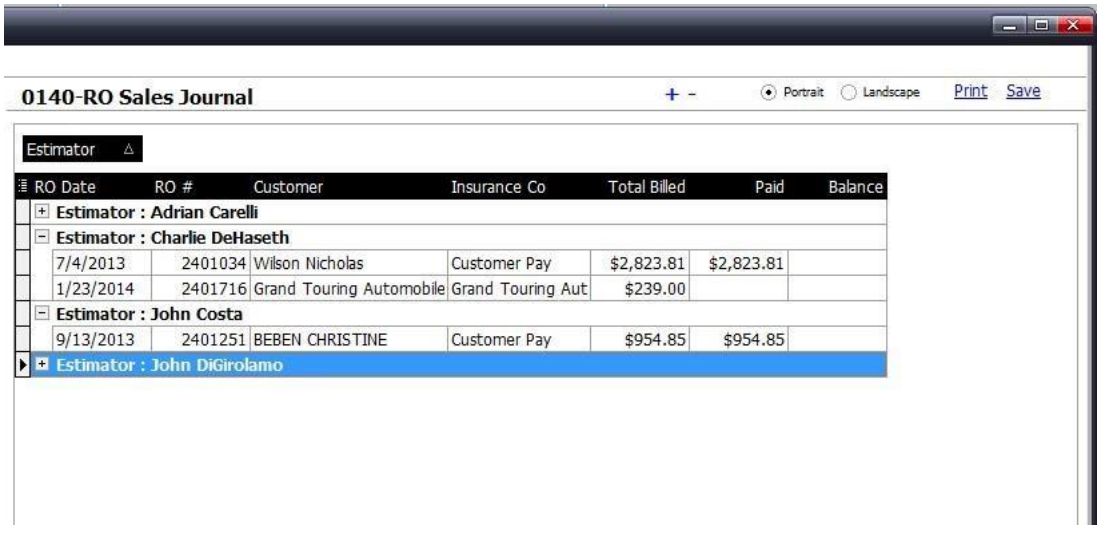


0140-RO Sales Journal

+ - Portrait Landscape Print Save

Drag a column header here to group by that column

RO Date	RO #	Customer	Estimator	Insurance Co	Total Billed	Paid	Balance
4/1/2013	2400799	MAPLE DRYWALL	John DiGirolamo	Customer Pay	$1,777.26	$1,777.26	
4/4/2013	2400813	ASSURED MECHANICAL	John DiGirolamo	Assured Vaughan I	$921.97		
5/13/2013	2400893	WINDOW HARDWARE CO	John DiGirolamo	Customer Pay			
5/17/2013	2400908	FRANCELLA DE LEAL LUIG	John DiGirolamo	Intact Insurance -	$3,462.73	$3,462.73	
5/17/2013	2400909	WAUGH ADAM	John DiGirolamo	Intact Insurance -	$2,602.97	$2,602.97	
5/22/2013	2400919	BIFOLCHI ATTILIO	John DiGirolamo	Unica Insurance In	$860.38	$860.38	
5/28/2013	2400937	ASSURED VAUGHAN MECH	John DiGirolamo	Assured Vaughan I	$1,211.93		
6/3/2013	2400950	Langlois Raynald	John DiGirolamo	CEI Fleet Services	$1,196.04	$1,196.04	
6/5/2013	2400962	Mcintyre Bryan	John DiGirolamo	CEI Fleet Services	$2,959.66	$2,959.66	
6/10/2013	2400973	Grande Cheese	John DiGirolamo	Customer Pay	$3,893.96	$3,893.96	
6/18/2013	2400989	PALOMBI NINA	John DiGirolamo	Economical Insurar	$764.42	$764.42	
6/28/2013	2401022	GUIDA LUCIA	John DiGirolamo	Intact Insurance -			
7/4/2013	2401034	Wilson Nicholas	Charlie DeHaseth	Customer Pay	$2,823.81	$2,823.81	
7/20/2013	2401085	VIRJI ADIL	John DiGirolamo	Intact Insurance -	$3,304.62	$3,304.62	
7/25/2013	2401103	Gorga Jose Mauricio	John DiGirolamo	CEI Fleet Services	$3,369.82	$3,369.82	
7/27/2013	2401107	ADEJOBI EDEN O	John DiGirolamo	TD Home & Auto I	$1,437.47	$1,437.48	
7/29/2013	2401111	Tucci Frank	John DiGirolamo	CEI Fleet Services	$3,241.97	$3,241.97	
7/30/2013	2401123	MICELI MARCELLO	John DiGirolamo	Intact Insurance -	$1,127.34	$1,127.43	
7/31/2013	2401125	GRUBA MARIUSZ	John DiGirolamo	Security National Ir	$4,624.25	$4,624.25	
7/31/2013	2401127	ZANUZZI ALDO	John DiGirolamo	Intact Insurance -	$3,028.57	$3,028.57	
8/1/2013	2401128	NARDINI-ZITELLA BARBAR	John DiGirolamo	Security National Ir	$5,685.11	$5,685.11	
8/8/2013	2401142	Bridgette Smith	John DiGirolamo	Personal/Certas Ins	$4,219.70	$4,219.70	
8/8/2013	2401145	SOU JOYCE	John DiGirolamo	Security National Ir	$708.51	$708.51	
8/9/2013	2401148	TD BANK (COLANGELO LI	John DiGirolamo	TD General Insurar	$3,661.48	$3,661.48	
8/14/2013	2401169	HARPLEY, DAVID *	John DiGirolamo	Economical Insurar			
8/14/2013	2401170	HARPLEY, CHAD *	John DiGirolamo	Economical Insurar			
8/16/2013	2401176	BALDASSARRE LUCIA	John DiGirolamo	Intact Insurance -	$2,455.24	$2,455.24	
8/20/2013	2401192	SIGGIA ROSANNA	John DiGirolamo	Personal/Certas Ins	$1,274.33	$1,274.33	



0140-RO Sales Journal

+ - Portrait Landscape Print Save

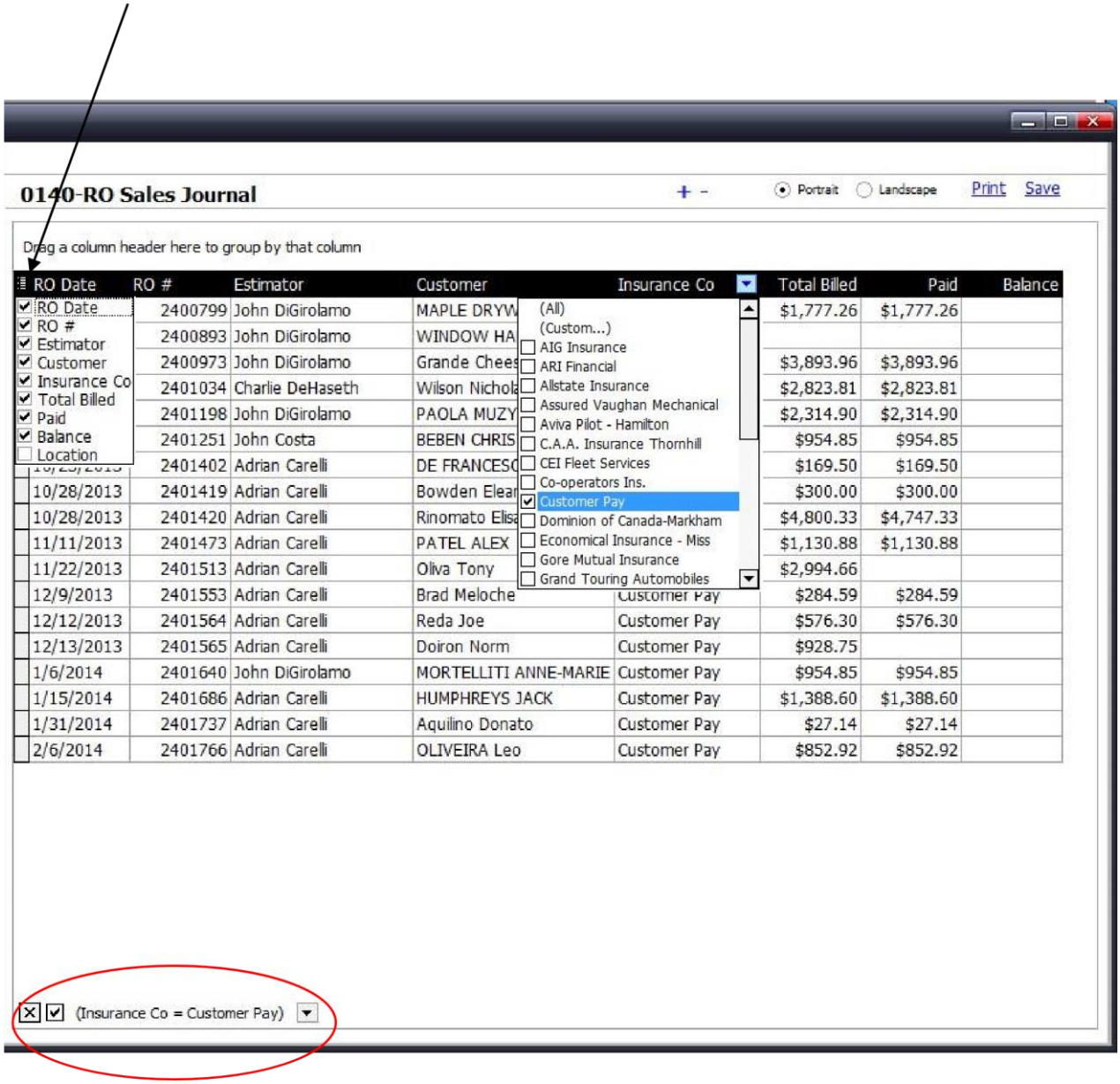
Estimator △

RO Date	RO #	Customer	Insurance Co	Total Billed	Paid	Balance
Estimator : Adrian Carelli						
Estimator : Charlie DeHaseth						
7/4/2013	2401034	Wilson Nicholas	Customer Pay	$2,823.81	$2,823.81	
1/23/2014	2401716	Grand Touring Automobile	Grand Touring Aut	$239.00		
Estimator : John Costa						
9/13/2013	2401251	BEBEN CHRISTINE	Customer Pay	$954.85	$954.85	
Estimator : John DiGirolamo						

Filtering

You can filter any of the columns by clicking on the “down arrow” to the far right of each column and choosing your filter. (Below “Insurance Co is filtered) To revert back to normal, simply click “(All).”

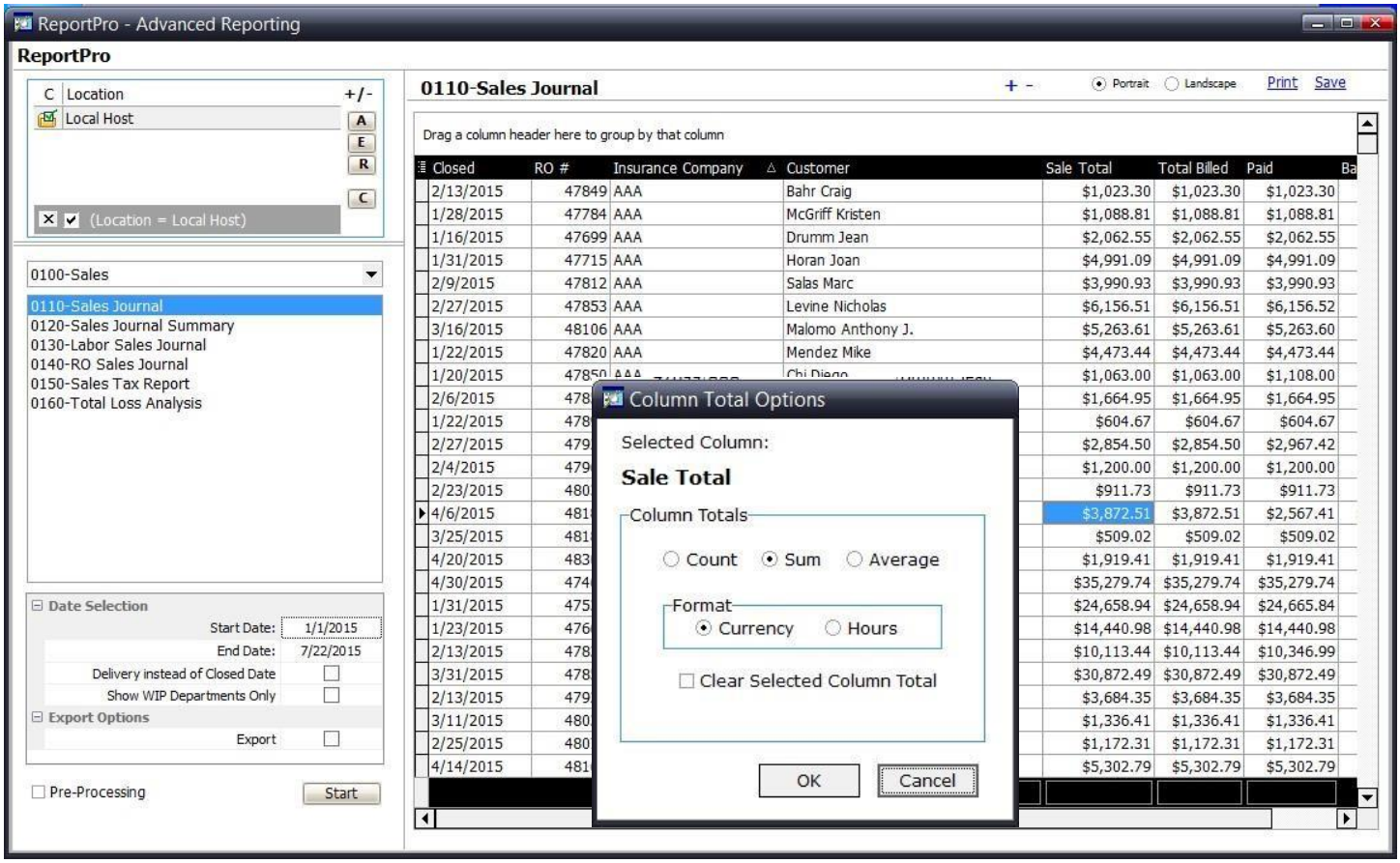
You can even remove or add available columns to the print list by clicking in the top, left-hand corner of the columns list and checking/unchecking the options you desire.



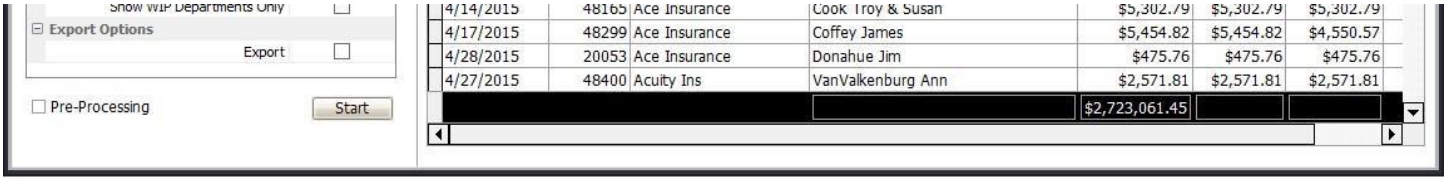
Applying Totals

ReportPro allows you to add Column Total Options for review and print.

To add a column total for review or print, simply highlight the column you'd like to total, right click and it will launch the "Column Total Options" window.



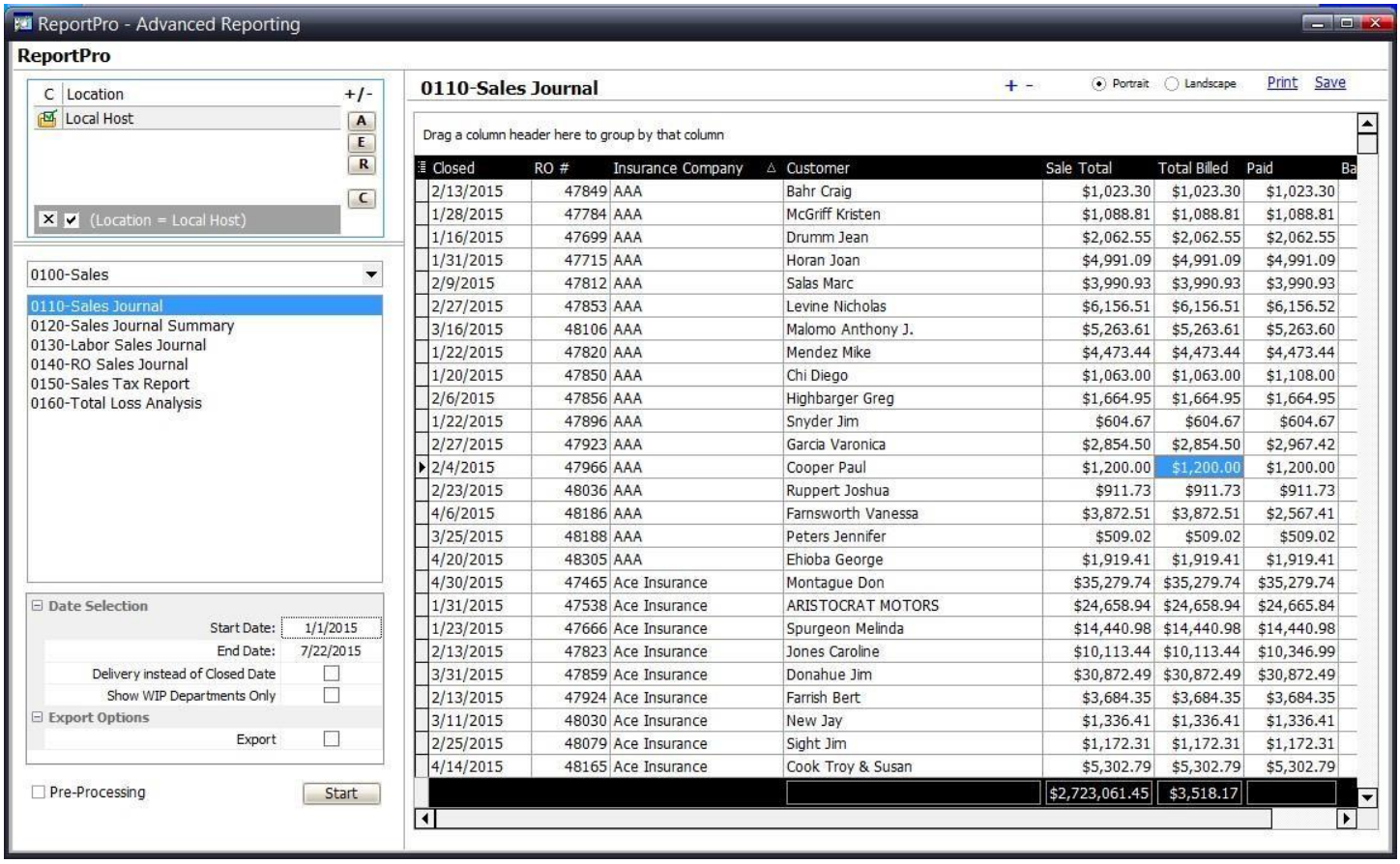
This allows you to choose Count, Sum or Average and to format the numbers in Currency or Hours. The totals will show at the bottom of the screen.



NOTE: If your screen is sorted or filtered, the totals may show below the viewable area. To view them, simply scroll down to the bottom of the page and you will see the totals.

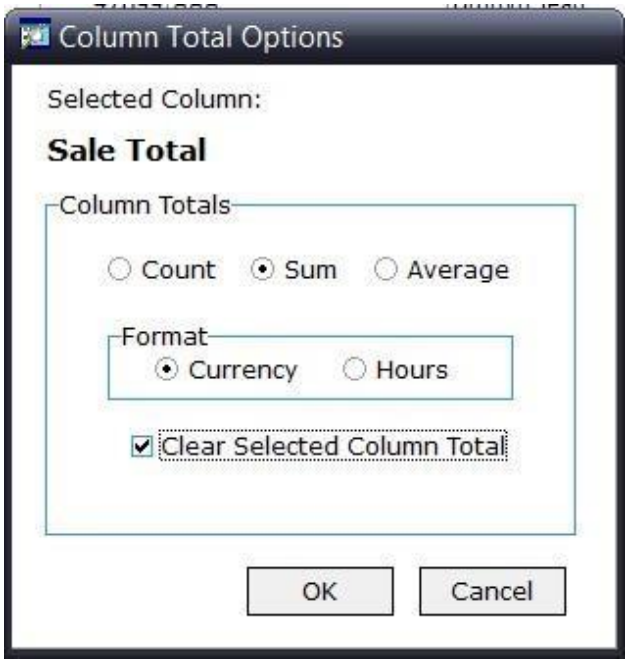
Column Totals with Different Options Applied

You can also sort one column by Totals and a different column by Average, etc.



Closed	RO #	Insurance Company	Customer	Sale Total	Total Billed	Paid	Ba
2/13/2015	47849	AAA	Bahr Craig	$1,023.30	$1,023.30	$1,023.30	
1/28/2015	47784	AAA	McGriff Kristen	$1,088.81	$1,088.81	$1,088.81	
1/16/2015	47699	AAA	Drumm Jean	$2,062.55	$2,062.55	$2,062.55	
1/31/2015	47715	AAA	Horan Joan	$4,991.09	$4,991.09	$4,991.09	
2/9/2015	47812	AAA	Salas Marc	$3,990.93	$3,990.93	$3,990.93	
2/27/2015	47853	AAA	Levine Nicholas	$6,156.51	$6,156.51	$6,156.52	
3/16/2015	48106	AAA	Malomo Anthony J.	$5,263.61	$5,263.61	$5,263.60	
1/22/2015	47820	AAA	Mendez Mike	$4,473.44	$4,473.44	$4,473.44	
1/20/2015	47850	AAA	Chi Diego	$1,063.00	$1,063.00	$1,108.00	
2/6/2015	47856	AAA	Highbarger Greg	$1,664.95	$1,664.95	$1,664.95	
1/22/2015	47896	AAA	Snyder Jim	$604.67	$604.67	$604.67	
2/27/2015	47923	AAA	Garcia Varonica	$2,854.50	$2,854.50	$2,967.42	
2/4/2015	47966	AAA	Cooper Paul	$1,200.00	$1,200.00	$1,200.00	
2/23/2015	48036	AAA	Ruppert Joshua	$911.73	$911.73	$911.73	
4/6/2015	48186	AAA	Farnsworth Vanessa	$3,872.51	$3,872.51	$2,567.41	
3/25/2015	48188	AAA	Peters Jennifer	$509.02	$509.02	$509.02	
4/20/2015	48305	AAA	Ehioba George	$1,919.41	$1,919.41	$1,919.41	
4/30/2015	47465	Ace Insurance	Montague Don	$35,279.74	$35,279.74	$35,279.74	
1/31/2015	47538	Ace Insurance	ARISTOCRAT MOTORS	$24,658.94	$24,658.94	$24,665.84	
1/23/2015	47666	Ace Insurance	Spurgeon Melinda	$14,440.98	$14,440.98	$14,440.98	
2/13/2015	47823	Ace Insurance	Jones Caroline	$10,113.44	$10,113.44	$10,346.99	
3/31/2015	47859	Ace Insurance	Donahue Jim	$30,872.49	$30,872.49	$30,872.49	
2/13/2015	47924	Ace Insurance	Farrish Bert	$3,684.35	$3,684.35	$3,684.35	
3/11/2015	48030	Ace Insurance	New Jay	$1,336.41	$1,336.41	$1,336.41	
2/25/2015	48079	Ace Insurance	Sight Jim	$1,172.31	$1,172.31	$1,172.31	
4/14/2015	48165	Ace Insurance	Cook Troy & Susan	$5,302.79	$5,302.79	$5,302.79	
				$2,723,061.45	$3,518.17		

To clear the totals, simply right click on the column, and choose "Clear Selected Column Totals"



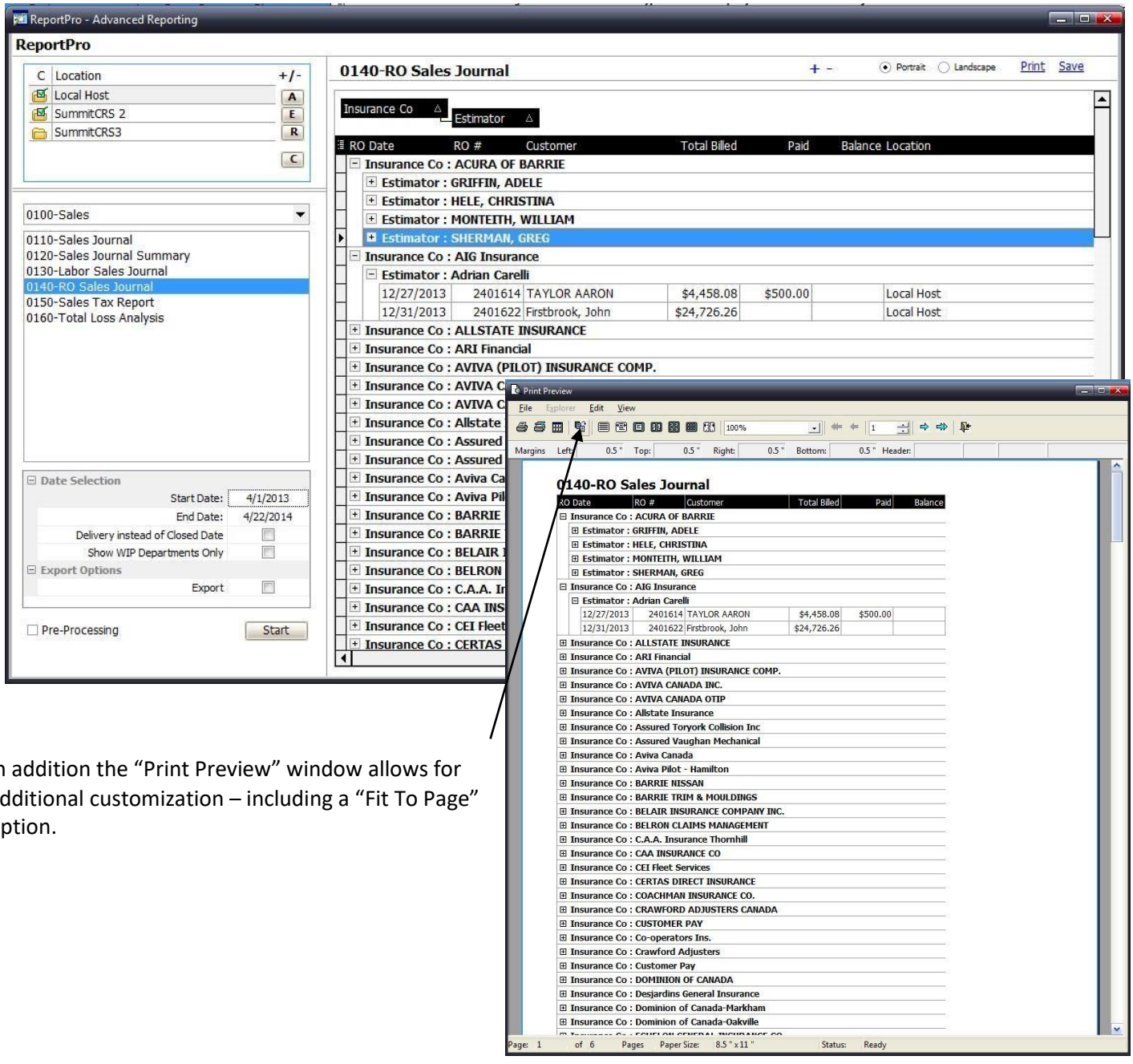
Saving Your Changes

You can "lock in" customized reports by clicking "Save" in the top right of the screen ** NOTE: Your report will now "default" to the "Saved" choice you made every time you run the report.

Printing

When you print, ReportPro will display on the Print Preview exactly what you see on the screen. Should the columns be too wide for the printed page, the extra columns will fall to page 2.

Report Pro now allows you to choose to print your report in Portrait or Landscape by clicking on your choice.

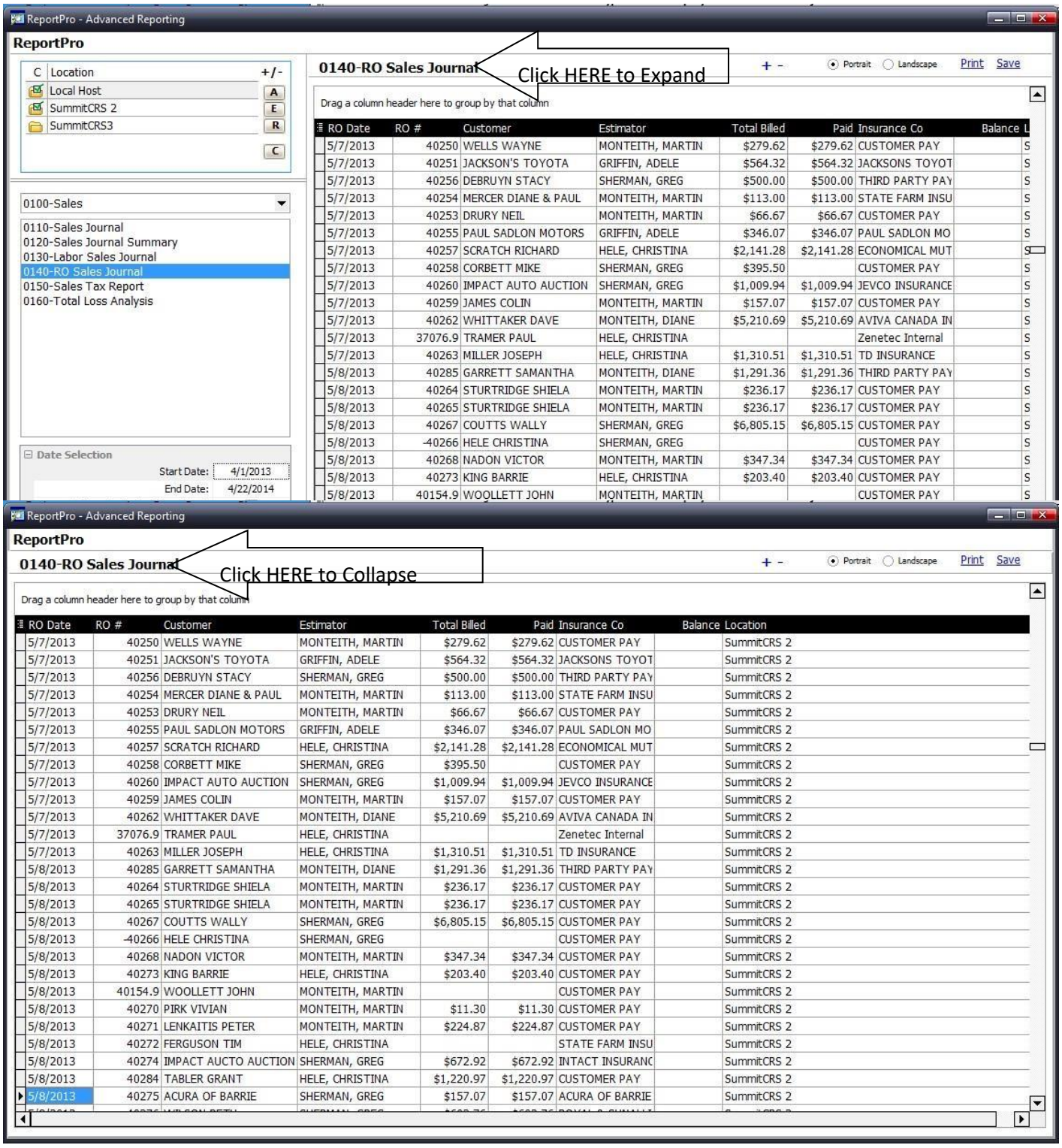


In addition the “Print Preview” window allows for additional customization – including a “Fit To Page” option.

Additional Tips

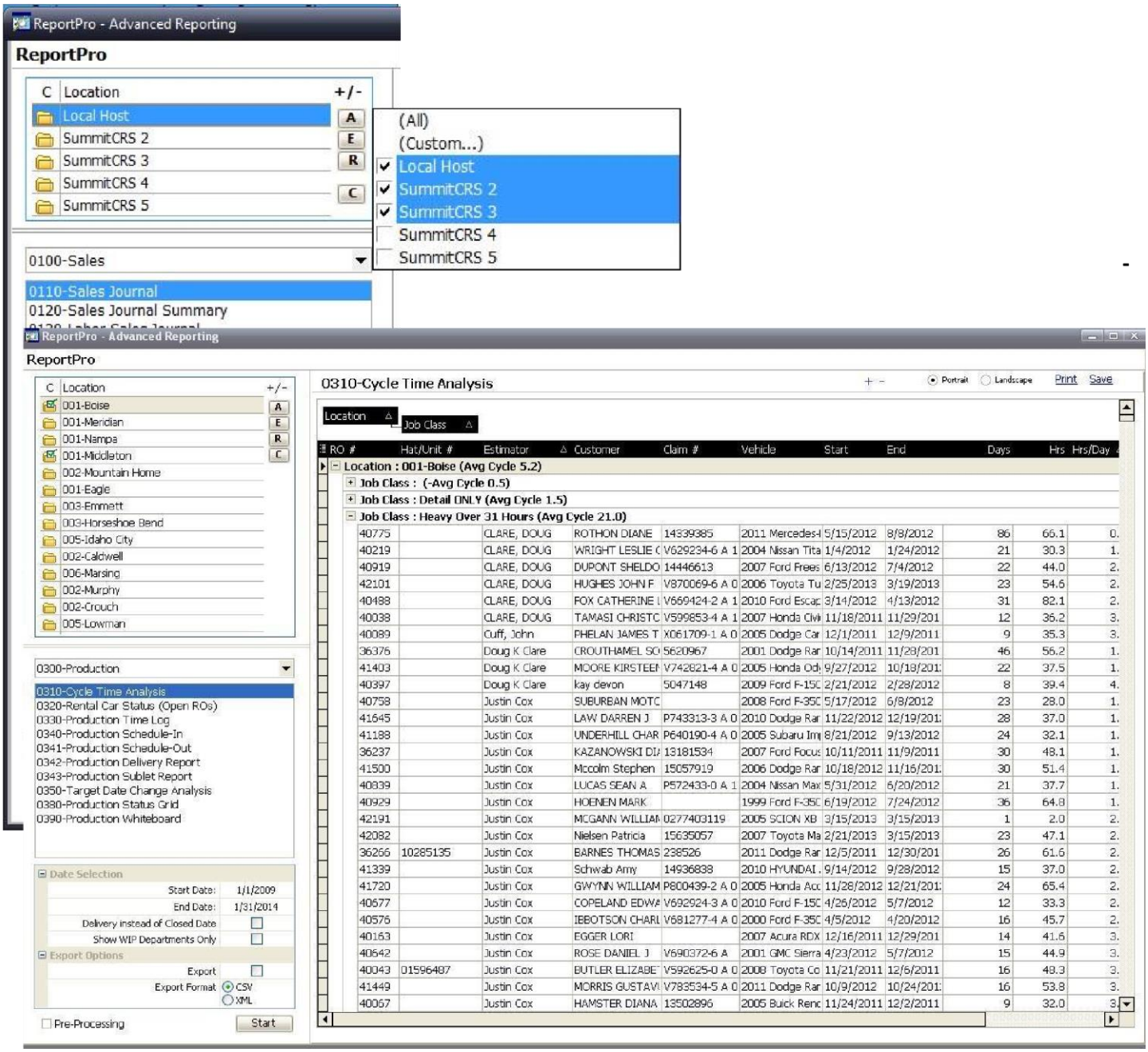
Expanding the “View”

To ONLY see the report and exclude the “setup” simply click on the report name, i.e.: **0140-RO Sales Journal** and the report view will expand. To return the screen to default simply click on the report name again.



MSO Features

Roll-Up Reporting for multiple shops.

Add all your shops to run reports. OR, you can filter in/out shops by clicking on the drop-down arrow in the “C Location” row and checking the ones you choose.

Finally, if you have so many locations that you cannot see all of them in the setup screen, you can simply click the **+ /** to the right of the “C Location” row to Expand/Collapse the Location List