SUMMITCRS
COLLISION REPAIR SYSTEMS

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ReportPro Training & Reference Guide (Summit V8)

010 - Sales

011 - Sales Journal Uses: Closed Date.	This report is designed to show the dollar amount of Closed RO's and how much remains to be paid. Sales Amount is the amount of the RO without tax. Total Billed includes tax.
012 - Sales Journal Summary Uses: Closed Date.	This report is a 1-page summary of the 011 report. The report is separated into income categories, page 2 shows the Custom Accounts.
013 - Labor Sales Journal Uses: Closed Date.	This report shows how many labor hours were on each RO. The hours are shown per labor type, with a labor grand total for each RO, and a summary at the end.
014 - RO Sales Journal Uses: RO Creation Date	Each RO listed shows the Total Billed, amount paid, and balance owed. Total Billed includes tax.
015 - Sales Tax Report Uses: Closed Date.	The Total does not include tax. The summary gives the grand total of: total sales, taxable sales, the three tiers of tax, and a grand total of all money billed. The grand total should match the 011 reports Total Billed.
016 – Total Loss Analysis Uses: Closed Date.	This report shows the Closed RO's that had been marked as Total Losses. The total is the amount of the RO that is not considered part of the total loss. (I.e. Tear Down, Towing, etc.)

020 - Work In Process (WIP)

0200 - Accounting WIP Summary Uses: Scheduled Out Date	This report shows cost on open RO's with a scheduled out date in the next calendar month. The cost does not need to be incurred during the current month. This report should be run on the last day of the month.
0201 - Accounting WIP Detail Uses: Scheduled Out Date	Same as report 0200-Accounting WIP Summary, with the difference that each individual RO and cost is displayed.
021 - WIP Sales Report Uses: Scheduled In Date	Unlike the Sales Journal, this report is run on Open RO's. Showing a Sub Total (without tax), and a Grand Total (with tax).
022 - WIP Cost Detail Uses: Scheduled In Date	This report prints each RO on its own page. The top of the page contains the Cost Summary; the bottom portion contains the Cost Details.

023 - WIP Cost Summary Uses: Scheduled In Date	In this report, all RO's that were open during the date range are listed. Costs on each RO are listed by cost center.
024 - WIP Labor Detail Uses: Scheduled In Date	This report displays the total hours for Body, Paint, Frame, and Mechanical on the RO's that were open during the date range.
0251 - WIP Labor Balance (Actual) Uses: RO Creation Date	Only Open RO's created within the date range will show on this report. If Business Rule#40 is disabled, then date selection will not affect the report. This report shows the percent of the job that has been completed based on the Timesheets for that job.
025 - WIP Labor Balance (Flags) Uses: Scheduled In Date	Similar to report number 0521 - WIP Labor Balance (Actual). This report is based on Flagged Labor.
0261 - Not in Process Report Uses: Scheduled In Date	Shows open ROs that are not in a WIP production department, and what department they are in.
026 - WIP Status Report Uses: Scheduled In Date	Displays the current production department of each open RO.
027 - WIP Warning Flag Report Uses: Scheduled In Date	Shows current warning flags on open ROs.
028 - Total Loss Analysis Uses: All Current Open RO's	This report shows all of the open ROs that are marked as Total Loss. If there are still charges on the RO, such as towing, these will show in the Totals column.
029 - WIP Delivered Uses: All Current Open RO's	This report shows all Open RO's that have had the Delivered Date assigned.

030 - Production	
031 - Cycle Time Analysis Uses: Closed Date.	Gives a list of dates to use for the Cycle Time Report. Only VALID dates will print. If a date is missing or is invalid from an RO, the RO will NOT print on the report.
032 - Rental Car Status Not Date Specific	Shows ROs that have rental cars assigned. Also shows if the car is late for delivery and by how many days.
033 - Production Time log Uses: Closed Date.	Shows Logs that were entered within the date range selected. This report lists the production log entries from job notes. The

	notes contain: when the RO changed departments, the date/time of the entry, and the short notes of the entry.
0340 - Production Schedule-In Uses: Scheduled Out Date	This report shows RO's scheduled-out within the date range selected. Displays RO information, total labor hours, and amount total.
0341 - Production Schedule-Out Uses: Scheduled Out Date	This report shows RO's scheduled-out within the date range selected. Compares original promise date (OP) against the scheduled-out date, and shows how many days difference there are.
0342a - Production Sublet Report Uses: Scheduled Out Date	This report shows RO's scheduled-out within the date range selected. Designed to show the Sublet Items entered for each RO.
0342 - Production Delivery Report Uses: Scheduled Out Date	This report shows the Expected Delivery Date (scheduled out date) versus the Actual Delivery Date. Important Notes will display the warning flags for each RO.
035 - Target Date Change Analysis by Insurance Co. Uses: Target Date	Selects ROs with Target Date changes that happened within date range. Shows, by insurance company, how many changes were made and the reason for it.
036 - Target Date Change Analysis by Estimator Uses: Target Date	Selects ROs with Target Date changes that happened within date range. Shows, by estimator, how many times a reason for the change was used.

040 - Parts	
040 - Parts Invoice History Uses: Invoice Date	This report shows invoices entered within the date range selected. The invoices are listed by vendor. Invoice numbers, RO numbers, Cost Centers, and amounts are all shown.
041 - Parts Usage Analysis Uses: ????	This report lists: total number of parts by type, total dollar amount spent on each part type, and an overall percentage based on dollars spent.
042 - Late Parts Analysis Uses: Parts Due Date	This report shows parts received after their date due. Separated by vendor, this report displays which parts are late with the number of days late.

043 - Vendor Invoice History Uses: Invoice Date	This report shows invoices entered within the date range selected. Each Vendor prints on a separate page. Shows invoice#, RO#, Cost Centers, amounts, and any taxes listed.
044 - Vendor Tax Report Uses: Invoice Date	Shows invoices that had taxes on them.
045 - Vendor Discount Analysis Uses: Invoice Date	This report shows invoices entered within the date range selected. This report is designed to show the List and Cost amount of the part, and the discount percentage received.
0461 - Outstanding Credits by Vendor Uses: Invoice Date	This report shows all invoices entered before the End Date selected. Shows any Credits that the Vendor still owes the shop. One vendor per page.
046 - Outstanding Credit Returns Uses: Invoice Date	This report shows all invoices entered before the End Date selected. Shows any Credits that the Vendor still owes the shop.
047 - Credit Return Reasons by Vendor	Lists reasons for parts returned and how many returns per reason. All vendors are listed separately.
048 - Credit Return Reasons by Estimator	Lists reasons for parts returned and how many returns per reason. All estimators are listed separately.
049 - Outstanding IOUs	This report shows all outstanding IOUs per RO number and what their current status is. IOUs are parts or services the shop owes the customer.

050 - Job Costs	
050 - RO Cost Detail Report Uses: Cost Date	This report shows individual details of costs incurred within the date range specified. One RO per page, starting with the nonRO related costs. This report includes Open and Closed RO costs.
051 - Closed RO Cost Summary Uses: Cost Date	This report shows a summary of costs incurred within the date range specified. On the last page it gives the Total Cost, Total Sales, Gross Profit, and the totals for the individual cost centers. There is also a gross profit percentage that is calculated by averaging each RO's individual gross profit percentage.

060 - Labor / Payroll

060 - Manual Entry Timesheet Uses: None	This is a form for the Technicians to write down time spent on individual ROs.
0610a - Flagged Labor Summary Report Uses: Flagged Date	This report shows Total hours flagged and dollar amounts for each employee within a specified date range. Also contains vehicle data (Color, Year, Model).
0610 - Flagged Labor Report Uses: Flagged Date	Time flagged within the date range show on this report. It is sorted by Labor Type and Has totals for hours by labor type, and total dollar amounts. Separated by technician.
0611- Flagged Labor (No Cost) Uses: Flagged Date	Same as the Flagged Labor Report 610, but without any dollar amounts. Vehicle info is not included. There is not an overall summary for this report.
0613 - Team Payroll Uses: Flagged Date	Only techs assigned to a team will show here. Technicians that are part of the same team will all have the same amount of labor posted.
0620 - Timesheets by Employee Uses: Time Entry Date	This shows the time an employee has clocked in Summit. Each employee is printed on separate pages, allows you to choose which options are to be included in the report.
0621 - Timesheets by Date Uses: Time Entry Date	This report shows the time that was clocked on the particular day. Each Day having its own page.
0626 - Timesheet Summary by Cost Center Uses: Time Entry Date	Listed by employees, this report shows the total hours a tech was clocked in for. The hours are shown in total amounts, under each labor type, or Cost Center.
063 - Technician Bank Report Uses: Flagged Date	Listed by tech, in order by RO, and labor type. Shows how many of those hours were done previously (flags that were done outside of the date range), and how many are current flags (hours flagged within the date range).
064 - Labor Profit Analysis	Each labor type shows how many of the total RO's had that labor type on them. It also shows the costs and profits for each type with the percentages.

070 - Accounts Rec.

070 - Aged Sales Ledger Uses: NONE	Prints a list of Closed ROs that have an outstanding Balance. Selecting a date Range will not affect this report. This report also shows overdue amounts on a 30/60/90-day chart.
071 - A/R By Date Uses:	Prints a list of closed ROs with a balance due and payments made. At the bottom of the last page is a summary of total billed, paid on account, and balance due.
072 - A/R Payment Analysis Uses: Payment Made Date	Prints a list of all payments made during the selected date range with specific data for each payment.
073 - Receipt Summary by Estimator Uses: Payment Made Date	Prints a grand total of all payments received on each estimator's ROs.
074 - Statement of Account Uses: Payment Made Date	Prints a list of each Insurance company's RO's, with a balance due. This report is designed to be run one Insurance Company at a time. At the bottom of the last page is a Please Pay This Amount grand total.

080 - Marketing	
080 - Customer Address List Uses: RO Creation Date	Prints an address list for all ROs created within the selected date range.
081 - Customer Satisfaction Follow Up Uses: Closed Date	This report prints specific RO information used to collect CSI data. Includes the Total Sale for each RO.
082a - Outsourced CSI (Delivered) Uses: Delivered Date	This report is the same as the Outsourced CSI 082 report. With the exception that this report is based on Delivered Date rather than the Closed Date.
082 - Outsourced CSI Uses: Closed Date	This report displays specific information used to collect CSI data, without dollar amounts.
0831 - Source Detail Uses: RO Creation Date	Prints a list of Open and Closed ROs separated by Job/Estimate Source. Each source is printed on its own page. These sources are assigned at the time of conversion from estimate to RO.
083 - Source Analysis Report Uses: Closed Date	Prints a list of combined RO Job/Estimate Sources with totals and grand totals.

084 - Referral Source Analysis Uses: Closed Date	Prints a list of combined RO referral sources with totals and grand totals.
085a - Referral Source Detail (In) Uses: Arrival Date	Same as report above, except this report is run by vehicle Arrival Date rather than RO Close Date.
085 - Referral Source Detail Uses: Closed Date	Prints a list of individual RO's separated by referral sources with totals and grand totals. Each referral source is printed on a separate page.
086 - Estimate Follow Up List Uses: Estimate Creation Date	Contains a list of Estimates that were written, but have not yet been converted to an RO. Use this to assist in follow up calls.

090 - Performance	
0900 - Employee Activity Audit Uses: Notes Entry Date	Prints a list of all Job/History Notes generated by each employee. Each employee's entries are listed separate from the others, sorted by date. The Category column is currently used for internal referencing.
0901- CSI Performance Uses:	This report relies on the shop entering 3rd party CSI percentages into the system.
0902 - Rental Car Performance Uses:	
091a - Gross Profit Summary w/Total Loss Uses: Closed Date	This report shows Income versus Cost, before tax, on each type of Profit/Cost Center. Does not separate Custom Accounts. Includes Total Losses.

091 - Gross Profit Summary by Profit Center Uses: Closed Date	This Report Shows Income versus Cost, before tax, on each type of Profit/Cost Center. Does not separate Custom Accounts. Excludes Total Losses.

0920 - Technician Efficiency Uses: Closed Date	This report can be printed using either Standard or Cost Methods. Standard Method shows the hours assigned to the Primary tech only. Cost Method uses Dynamic Allocation for hours, and does not incorporate any hours assigned.
0921 - Technician Efficiency Summary Uses: Closed Date	This is a summary of report #0920, and can be printed using either Standard or Cost Methods. Standard Method shows the hours assigned to the Primary tech only. Cost Method uses Dynamic Allocation for hours, and does not incorporate any hours assigned.
0922 - Applied Labor Uses: Flagged Labor Date	This report is for shops that only have flat rate, or commission techs. Each tech has a page. The available hour's column is always 8. The applied column shows how many hours have been applied to the tech. The Non-RO column shows hours that the tech has worked that don't belong to an RO. The Unapplied column is the difference between the first three columns.
093 - Team Efficiency Uses: Closed Date	This report is similar to Tech Efficiency 0920, except that the Team report shows the overall efficiency for the entire team. With each Team being separate.
094a - Estimator Analysis Report Uses: Closed Date	Shows how many RO's were closed by each Estimator, within the dates selected. Includes: Sales, Totals, Profits, and Profits %.
094b - Insurance Analysis Report Uses: Closed Date	Shows how many RO's were closed by each Insurance Company, within the dates selected. Includes: Sales, Totals, Profits, and Profits %.
095a - Batting Average by Estimator Uses: Estimate Import Date	The purpose of this report is to show how many estimates are being written per Estimator, versus how many of those RO's are closed, or Sold.
095b - Batting Average by Insurance Company Uses: Estimate Import Date	The purpose of this report is to show how many estimates are being written per Insurance Company, versus how many of those RO's are closed, or Sold.
096a - Conversion Rate by Estimator Uses: Estimate Import Date	This report is designed to show how many estimates are being written per Estimator versus how many are actually being made into RO's. Or meaning how many are being converted to Open RO's.
096b - Conversion Rate by Insurance Company Uses: Estimate Import Date	This report is designed to show how many estimates are being written per Insurance Company versus how many are actually being made into RO's. Or meaning how many are being converted to Open RO's.

097a - Shop Pay List - Open RO's Uses: All Open RO's	This report searches all open RO's for lines marked as Shop Pay. The RO#, price, labor, and tech are included. Totals are also provided.
097b - Shop Pay List - Closed RO's Uses: Closed Date	This report searches RO's closed with-in the date range selected, for lines marked as Shop Pay. The RO#, price, labor, and tech are included. Totals are also provided.
098 - Lost Business Analysis Uses: Closed Date	Prints a list of lost business reasons, number of jobs lost per reason, and sales amount lost per reason. Prints totals summary at bottom of page.
099 - Touch Time (Vehicle) Uses: Time Sheet Entry Date	This report includes ALL techs with hours entered in Time Sheets. Only Time Sheets entered with-in the date range will show, regardless of RO status. (Open or Closed)

100 - General

100 - Company Profile Uses: NONE	Prints the entire list of Business Rules and their status. The true or false status means whether or not the Business Rule is checked or not.
101 - Insurance Log Uses: Closed Date	Prints a list of individual RO information by insurance company. Each insurance company prints on separate pages.