8.0 Quick Start Guide

Training And Reference Manual

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Minor Changes to Version 8

Most of the changes to SummitCRS have been done on the database side to increase speed and flexibility and allow for "Cloud" options moving forward. Every attempt has been made to keep the basic usage and functionality the same… initially. A few changes were required and are covered in this guide to help you navigate those minor changes. Check out the new features CLICK HERE

MediaPoint

MediaPoint replaces the Media tab and provides additional flexibility CLICK HERE.

Here's a link to the new MediaPoint Guide: www.summitcrs.net/pdf/MediaPointGuide.pdf

ReportPro

ReportPro is a new option in Reports tab and offers more flexibility and MSO options.

Because of the flexibility in customizing reports, some reports have been combined CLICK HERE.

Here's a link to the ReportPro Guide: www.summitcrs.net/pdf/ReportProGuide.pdf

Legacy Reports

The "Reports" from the past versions of SummitCRS can still easily be launched by clicking on the "Legacy" link in the "Report's" tab.

Moved Buttons

The QuickPrint, Timeclock Status button and RO Schedule buttons have been moved up to the "QuickLinks" for space savings.

New Advanced search

SummitCRS's improved advanced search allows you to search your entire database from your earliest to most recent Assignments, Estimates, Open & Closed Ro's, Voided & Lost Business. By right-clicking you can jump to the desired record in SummitCRS. This feature helps your shop save time and find information easier in SummitCRS.

CHD/TT Column

Calculated Hours Per Day (CHD) Column. The CHD Column has been added to SummitCRS. This may also be indicated as Touch Time or (TT)

CHD/TT = Total hours divided by number of days in the shop. I.e.: total hours/days Uses: Arrival Date as 'Start Date'

Column will indicate 0 if
There are no hours on the job... OR
The vehicle has not arrived... OR
The vehicle arrival date is in the future

And each job must be calculated after import and sync

Colors for CHD/TT Column:
White/Red = 3.99 or below
Black/Yellow = 4.00-5.00
White/Green Above 5.00

CDR Column

The CRD Column has been added to SummitCRS. *Calculated Days Remaining (CDR) Includes Weekends and Holidays

Total Hours/4* = Calculated Days Remaining
* 4 hours is the average number of daily hours required by insurance companies

X = Total RO hours
Y = Cycle Days
X/4 = Y

Delivery Date = Arrival Date + Cycle Days
CDR = (Delivery date - today)

EXAMPLE: If a job has 40 hours on it and it arrives today the CDR column (today) would indicate 10, tomorrow a 9, the next day an 8 and count down each day until on the delivery date, (when the CDR column would indicate 0)

Colors for CDR Column:
Green = Over 1 day
Yellow = 0-1 days
Red = less than 0 days

Dashboard

The dashboard has a new look and feel but still works as before.

Production QuickList

This new form allows you to easily create a daily checklist for technicians or others to sequentially follow.

To see a guide, click here: www.summitcrs.net/pdf/ProductionQuickList.pdf

Repair Start

In the Information Bar you will now see a Repair Start indicator.

New Products

Free with the version 8 upgrade

Production Dashboard Quickview (PDQ): The next generation of "shop floor" scoreboards.

Production Dashboard QuickView
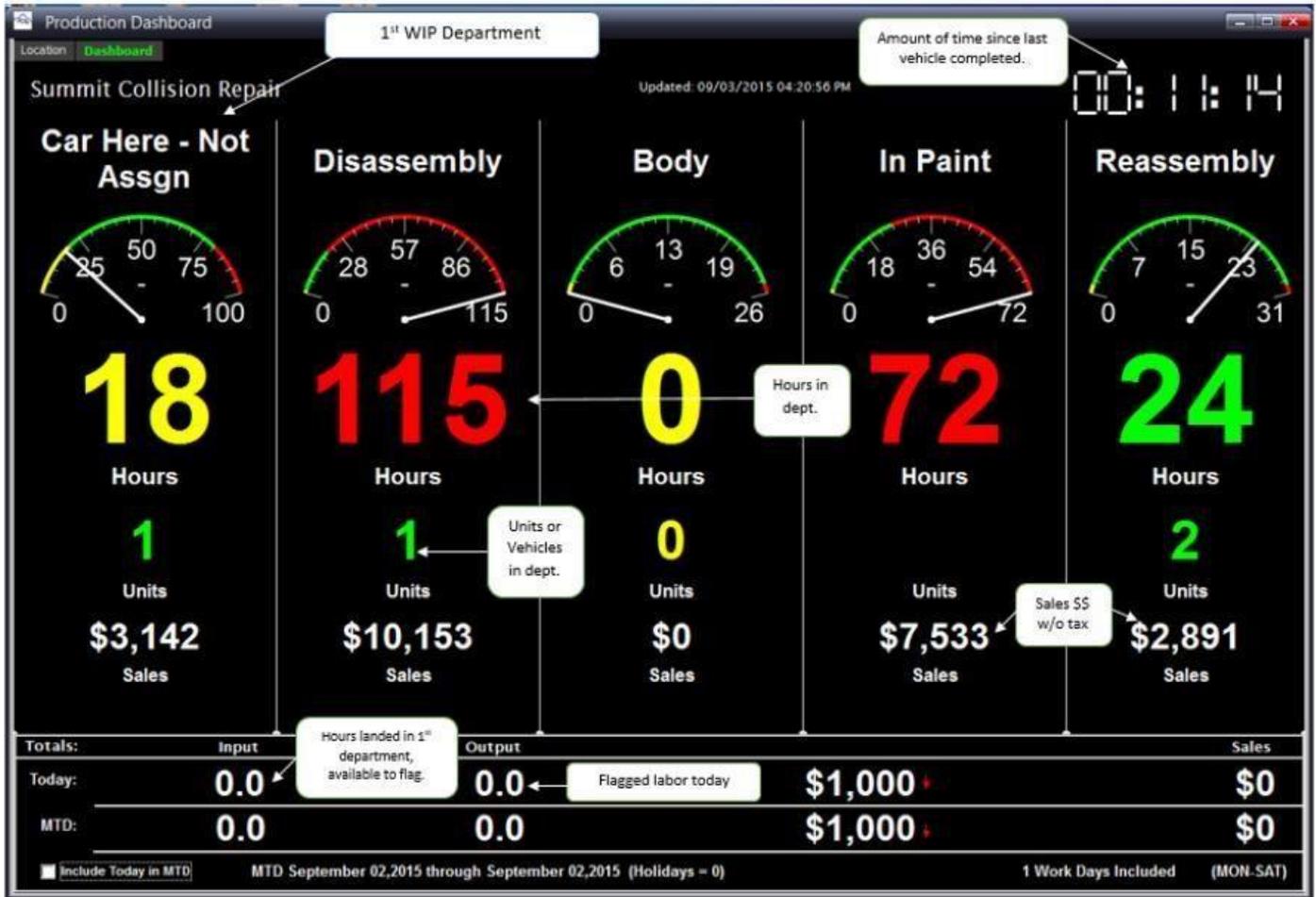
For a complete guide: www.summitcrs.net/pdf/PDQ_Guide.pdf

Terminal

Terminal: Critical information can now be easily shared with the production team. Imagine an automatically updated "Release Meeting" whiteboard on the shop floor ALL DAY LONG! That's Terminal.

For more information, CLICK HERE for a complete guide:

www.summitcrs.net/pdf/TerminalGuide.pdf