

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.

Jump: Test Database (All Dates)

Est #: 4811 Jeff Bridges B Tech: JB Sch In: 4/24/2015 Status: HOLD Contact: None
 RO #: 13214 2006 LINC ZEPHYR P Tech: PT OP: 4/24/2015 L Notes
 Est Nm: Johnny Deep C Tech: Sch Out: 4/30/2016
 Ins Co: CUSTOMER PAY Rpr Start: 4/24/2015 Warning:
 Deduct: \$0.00 Images: 0 PARTS: 2 0 1 0 0 1 0 0

Jobs

Advanced Search

Customer Name VIN # Claim # Policy # RO # Unit #/Hat # SMS # [smith]

| Status | Est # | RO # | Customer Name | Phone # | SMS | Year | Make | Model | VIN # |
|-----------|-------|-------|----------------|---------------|-----|------|---------|--------------|------------|
| Closed RO | 2999 | 11965 | SMITH LARRY | (208)888-8888 | | 2012 | Ford | Pickup F150 | 1FTEX1CM: |
| Estimate | 6237 | 0 | SMITH LISA | (208)888-8888 | | 2014 | Hyundai | Tucson | KM8JU3AGI |
| Estimate | 2308 | 0 | smith michelle | (208)888-8888 | | 2008 | Toyota | RAV4 | JTMZK31V) |
| Closed RO | 6833 | 14702 | SMITH NONDO | (208)888-8888 | | 2006 | Acura | TL | 19UUA662I |
| Closed RO | 1105 | 11023 | SMITH RANDY | (208)888-8888 | | 2003 | Honda | Element | 5J6YH285E |
| Closed RO | 6002 | 14075 | SMITH ROB | (208)888-8888 | | 2005 | CHEV | C1500 4X2 S | 1GCEC19T0 |
| Closed RO | 5607 | 13786 | SMITH ROBERT | (208)888-8888 | | 2012 | Ford | Fusion | 3FAHP0JA2 |
| Estimate | 6037 | 0 | SMITH ROBERT | (208)888-8888 | | 2012 | Ford | Fusion | 3FAHP0JA2 |
| Closed RO | 6038 | 14100 | SMITH ROBERT | (208)888-8888 | | 2012 | Ford | Fusion | 3FAHP0JA2 |
| Closed RO | 5724 | 13876 | SMITH ROBERT | (208)888-8888 | | 2012 | Ford | Fusion | 3FAHP0JA2 |
| Closed RO | 6194 | 14210 | SMITH SHELLI | (208)888-8888 | | 1993 | Toyota | Corolla | 1NXAE09E! |
| Closed RO | 5160 | 13458 | SMITH SUZANN | (208)888-8888 | | 2000 | TYTA | TUNDRA | 5TBR7341- |
| Closed RO | 5656 | 13823 | SMITH SUZANNE | (208)888-8888 | | 2008 | HOND | PILOT 4X4 E | 5FN9YF184E |
| Closed RO | 5053 | 13383 | SMITH TIMOTHY | (208)888-8888 | | 2010 | Honda | Accord Cross | 5J6TF1H31 |
| Closed RO | 7180 | 14891 | SMITH, THOMAS | (208)888-8888 | | 2013 | CHEVY | IMPALA | 2G1W65E3 |

Jump to -> Closed RO

32 records found.

| | | | | | | | | | | | |
|------|-------|----------|------------------|-------------|-----------|-------------------|-------------|---------|------------------|------------|--------------|
| 7421 | 15043 | 7/14/201 | PROGRESSIVE | Jaime Jones | 8/5/2016 | Chelsey Tulip | 2015 Honda | Accord | 7LCA01HGCR2F50F | \$9,524.01 | 16-3835419-C |
| 7423 | 15020 | 7/15/201 | CUSTOMER PAY | Jaime Jones | 7/15/2016 | Kathryn Schultz | 2014 Toyota | Prius | 7GBF1JTDKN3DU3E | \$0.00 | CAPA-002663 |
| 7433 | 15048 | 7/18/201 | MERCURY INSURANC | Jaime Jones | 7/18/2016 | Craig Tall | 2002 Subaru | Outback | NO PL 4S3BH67582 | \$289.00 | CAPA-003003 |
| 7436 | 15051 | 7/18/201 | AAA INSURANCE | Jaime Jones | 8/8/2016 | Zeke Elliot | 1998 Honda | Accord | 4CMH11HGCG5645V | \$3,627.30 | 012380421-I- |
| 7440 | 15055 | 7/18/201 | MERCURY INSURANC | Jaime Jones | 8/9/2016 | Robert Gronkowski | 2010 Toyota | Prius | 6PMC2JTDKN3DU6A | \$6,578.56 | CAPA-003007 |
| 7442 | 15056 | 7/19/201 | AAA INSURANCE | Jaime Jones | 8/10/2016 | Nicole Smith | 2013 Dodge | Durango | 7BQC11C4SDHDT9C | \$8,578.93 | 012407292-I- |

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

The screenshot shows the SummitCRS System Module interface. At the top, there are fields for Est # (9612), RO # (905068), Est Nm (Sankar, Ryan), Ins Co (Intact Insurance - (Ajax)), and Deduct (\$1,000.00). There are also fields for Techs (B Tech: BDKHA, P Tech: PTGOW, C Tech: PTGOW), Sch In (5/21/2015), OP (6/4/2015), Sch Out (6/1/2015), Rpr Start, Status (Prep), and Contact (None). A warning message reads "Warning: Alignment and tire balance". The PARTS count is 17, with a color-coded breakdown: 5 (green), 10 (yellow), 0 (red), 0 (black), 0 (white), 2 (purple), 0 (grey).

The main table displays a list of jobs with columns for Est #, CHD, Job Class, Customer, Dept/Status, Total, R.O. #, Sch In, and Ins. The CHD values are color-coded: 0.00 (white/red), 1.09 (red), 0.89 (red), 1.27 (red), and 8.40 (green).

| Est # | CHD | Job Class | Customer | Dept/Status | Total | R.O. # | Sch In | Ins |
|-------|------|-------------|-------------------|-------------|------------|----------|-----------|-------|
| 9557 | 0.00 | Warranty Re | Kuo Teu-Yu | Delivered | \$0.00 | 904614.9 | | Intac |
| 9564 | 1.09 | Over 30 Hou | Espinoza Ester | Delivered | \$5,556.72 | 905036 | 5/14/2015 | Intac |
| 9606 | 0.89 | Over 30 Hou | Carlberg Raymond | Refinish | \$6,112.58 | 905063 | 5/20/2015 | Intac |
| 9612 | 1.27 | Over 30 Hou | Kourkoutis Cerise | Prep | \$6,241.42 | 905068 | 5/21/2015 | Intac |
| 9628 | 8.40 | 0-15 Hours | ANDERSON BRAD | Refinish | \$447.60 | 905077 | 6/10/2015 | Allst |

At the bottom of the window, it shows "Rows = 5", "Search Idle", "Last Refresh: 06/25/2015 10:51 AM", "User: Joseph Kelly", "Location: AssCloud", and "Screen #102".

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

The screenshot shows the SummitCRS software interface. At the top, there is a header with various icons and a search bar. Below the header, there is a summary section with fields for Est #, RO #, Est Nm, Ins Co, Deduct, Images, B Tech, P Tech, C Tech, Sch In, OP, Sch Out, Rpr Start, Status, Warning, and Contact. The main area is a table with columns: Grids, Dup, Import, Synch, Warty, Calc, Refresh, PPC, Print, Void, Est #, TT, CDR, Sch Out, Job Class, Customer, Dept/Status, Total, and R.O. The CDR column is color-coded: green for positive values, yellow for 0-1 days, and red for negative values. The table contains 22 rows of job data.

| Grids | Dup | Import | Synch | Warty | Calc | Refresh | PPC | Print | Void | Est # | TT | CDR | Sch Out | Job Class | Customer | Dept/Status | Total | R.O. |
|-------|-----|--------|-------|-------|------|---------|-----|-------|------|-------|-------|-----|-----------|----------------------|-------------------|----------------------|------------|------|
| | | | | | | | | | | 7632 | 0.03 | -83 | | WARRANTY | TATUSKO PATRICK | Gone\$\$\$\$ | \$155.56 | 4 |
| | | | | | | | | | | 7649 | 0.01 | -79 | 6/5/2015 | \$3,000 - \$4,999.99 | WORCH MATTHIAS | Total Loss | \$80.00 | |
| | | | | | | | | | | 7687 | 0.00 | -1 | 6/2/2015 | \$3,000 - \$4,999.99 | SANKARAN VELLIYUR | Total Loss | \$0.00 | |
| | | | | | | | | | | 7701 | 0.01 | -70 | 6/11/2015 | \$5,000 - \$7,499.99 | AMICAR ALBERTA | Total Loss | \$81.00 | |
| | | | | | | | | | | 7726 | 5.00 | 1 | 6/9/2015 | \$1,500 - \$2,999.99 | WOLF BRENT | Pre Order\$\$\$\$ | \$2,017.34 | |
| | | | | | | | | | | 7730 | 40.40 | 9 | 6/6/2015 | \$5,000 - \$7,499.99 | RANJO MARK | Ready For Delivery | \$5,410.52 | |
| | | | | | | | | | | 7734 | 0.16 | -54 | 6/9/2015 | \$0-\$1,499.99(NO S | OHARA SEAN | Body | \$1,315.28 | |
| | | | | | | | | | | 7742 | 0.19 | -56 | 6/4/2015 | \$1,500 - \$2,999.99 | VASQUEZ JORGE | Reassembly | \$2,036.54 | |
| | | | | | | | | | | 7745 | 0.30 | -49 | 6/10/2015 | \$1,500 - \$2,999.99 | BLOOM CPT ALVIN | Waiting for Estimate | \$1,543.26 | |
| | | | | | | | | | | 7746 | 0.00 | | 6/26/2015 | \$5,000 - \$7,499.99 | DEKLEVA SUZANNE | On Hold | \$0.00 | |
| | | | | | | | | | | 7749 | 0.38 | -52 | 6/5/2015 | \$1,500 - \$2,999.99 | JHOVAHN KHELRI | Ready For Delivery | \$2,161.98 | |
| | | | | | | | | | | 7751 | 0.00 | | 6/4/2015 | TOTAL LOSS | MAINS STEVEN | Total Loss | \$0.00 | |
| | | | | | | | | | | 7752 | 0.69 | -46 | 6/15/2015 | \$5,000 - \$7,499.99 | Mills Corine | Body | \$4,555.22 | |
| | | | | | | | | | | 7756 | 0.00 | | 6/8/2015 | SAME DAY!!!! | CALDWELL ANTONY | Pre Order\$\$\$\$ | \$145.21 | |
| | | | | | | | | | | 7757 | 0.26 | -52 | 6/9/2015 | \$1,500 - \$2,999.99 | GRIMM ISABELLE | Body | \$1,665.22 | |

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.

The screenshot shows a software interface window titled "System Module". Below the title bar is a toolbar with various icons for navigation and actions. The main area contains a summary of information for a specific unit, organized into several columns:

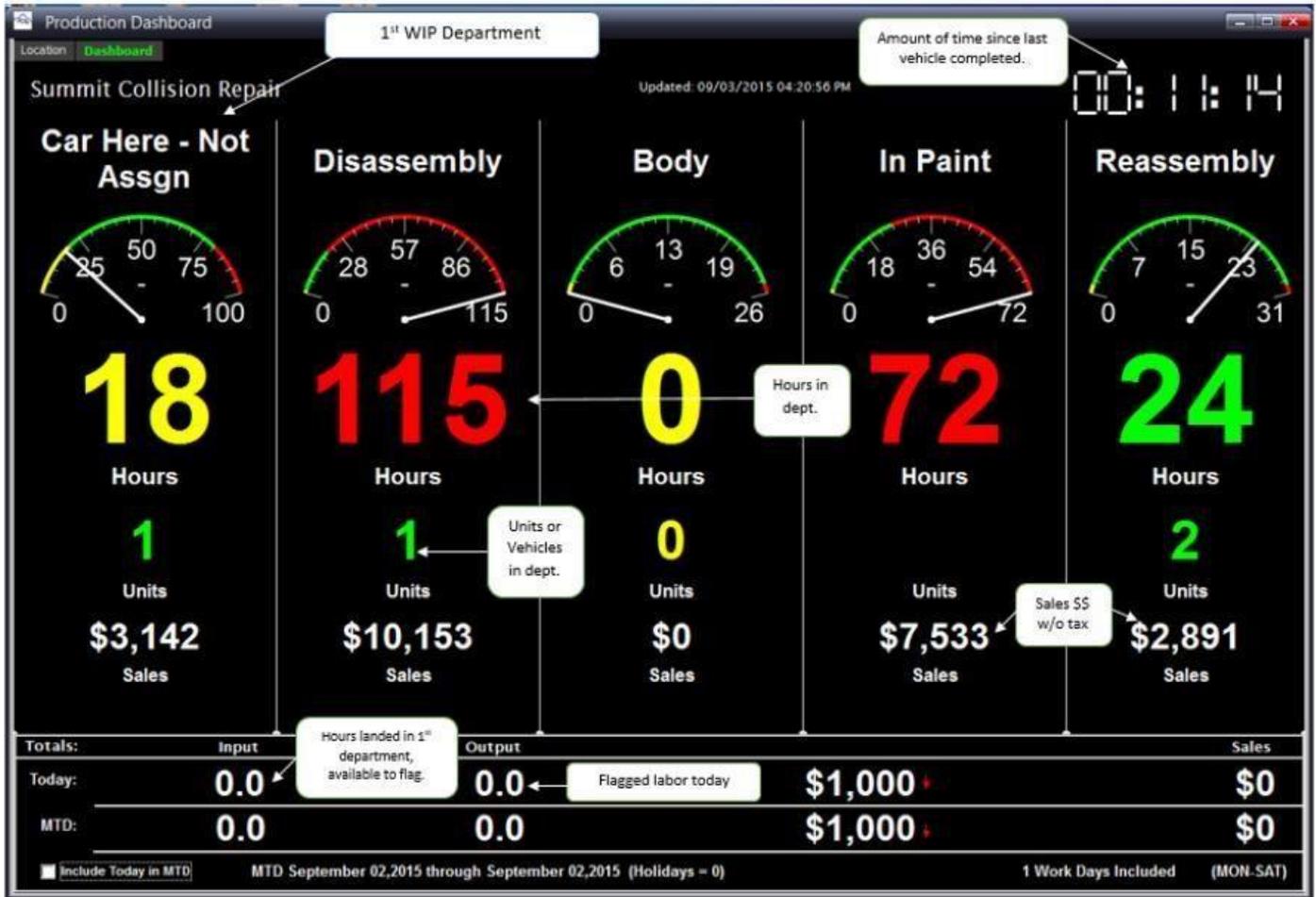
| | | | | |
|-------------------------------------|------------------|--------------------|----------------------------|-------------------------------|
| Unit #: | Crews Michael | B Tech: SJB | Sch In: 10/10/2013 | Status: To Be Assigned |
| RO #: 45122 | 1971 MGB MGB | P Tech: | OP: 7/31/2014 | L |
| Est Nm: Unassigned | | C Tech: | Sch Out: 12/31/2015 | |
| Ins Co: State Farm Insurance | | | Rpr Start: 7/9/2015 | Warning: |
| Deduct: \$0.00 | Images: 9 | | | PARTS: |

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.

ARRIVALS

| RO # | Customer Name | Insurance | Job Class | Scheduled In | Total | Year | Make | Model |
|--------|-------------------------|---------------|--------------|--------------|-----------|------|-----------|--------------------|
| 4950 | BROWN RICARDO | ALLSTATE | Job Class 2 | | \$378.77 | 1993 | CADIL | FLEETWOOD |
| 4866.9 | CUMMINS CHRISTO | GEICO | | | \$0.00 | 2007 | AUDI | A4 QUATTRO 5-LIN |
| 5161.9 | DAVAULT ANDREA | CSAA | Job Class 1C | | \$0.00 | 2013 | Honda | Accord |
| 3516 | HOLLIMAN DRAKE | A - GUEST PAY | Job Class 2 | | \$583.86 | 2003 | BENZ | E300 |
| 5423.9 | | A - WARRANTY | Job Class 1C | | \$0.00 | 2005 | TOYO | AWALDN LIMITED |
| 5283.9 | RODRIGUEZ MORELA | - WARRANTY | Job Class 1C | | \$0.00 | 2010 | CHEV | CAMARO SS2 |
| 5529.9 | GARCON GUINNESS | GEICO | | | \$0.00 | 2011 | SUBA | IMPREZA WRX |
| 5499.9 | VALENCIA BELYN | GEICO | Job Class 1C | | | | | |
| 5506.9 | ELIAS PEDRO | CSAA | | | | | | |
| 5496 | CHAMBERLAIN MARALLSTATE | | Job Class 4 | 5/13/2015 | | | | |
| 5527 | | GEICO | Job Class 3 | 5/18/2015 | | | | |
| 5507 | IBARRA BEATRIZ | CSAA | Job Class 3 | 5/21/2015 | | | | |
| 5569 | | CSAA | Job Class 9 | 5/21/2015 | \$0.00 | 1997 | LEXUS | SC400 |
| 5530 | | GEICO | Job Class 3 | 5/25/2015 | \$1,085.1 | 2015 | NISS | VERSA SV |
| 5507 | | CSAA | Job Class 2 | 5/26/2015 | \$956.54 | 2010 | Chrysler | 300 |
| 5511 | KHALIQ DOOST NACSA | | Job Class 2 | 5/26/2015 | \$704.07 | 2010 | Toyota | Camry |
| 5599 | PITTS MELANIE | ALLSTATE | Job Class 4 | 5/27/2015 | \$4,550.5 | 2003 | HOND | ODYSSEY EXL |
| 5574 | Serna Nike | CSAA | Job Class 3 | 5/29/2015 | \$1,436.6 | 2011 | Toyota | Yaris |
| 5100 | MILLER NICOLE | CSAA | Job Class 8 | 6/1/2015 | \$0.00 | 2003 | Toyota | 4Runner |
| 5359 | MARTINEZ ALFRED | CSAA | Job Class 8 | 6/1/2015 | \$54.00 | 2001 | Chevrolet | Pickup Silverado C |
| 5534 | STEVENS CAGI | FARMERS | Job Class 4 | 6/1/2015 | \$3,537.9 | 2007 | VW | RABBIT |
| 5576 | MURRIETA HAZEL | NATIONAL GEN | Job Class 4 | 6/1/2015 | | | | |
| 5589 | Boyd Gledine | GEICO | Job Class 2 | 6/1/2015 | | | | |
| 5596 | Ramos Norma | GEICO | Job Class 3 | 6/1/2015 | | | | |
| 5597 | NIETO HECTOR | NATIONWIDE | Job Class 1 | 6/1/2015 | | | | |
| 5585 | GALLOWAY TRICIA | GEICO | Job Class 3 | 6/3/2015 | \$2,386.3 | 2013 | HYUN | SONATA HYBRID L |
| 5518 | MORENO MARY | A - GUEST PAY | Job Class 2 | 6/8/2015 | \$1,217.4 | 2013 | TOYO | TACOMA 4X2 DOUB |
| 5575 | STAPP ELIZABETH | A - GUEST PAY | Job Class 1 | 6/9/2015 | \$1,170.3 | 2013 | HOND | CIVIC LX |

DEPARTURES

| Job Class | DOW | Scheduled Out | Flag | Flag Notes | Sublet Count | Status | Year | Make | Model |
|-------------|-----|---------------|------|------------|--------------|-------------------|------|-----------|------------------------|
| Job Class 3 | M | 5/28/2015 | | | 0 | Pre Order\$\$\$\$ | 2015 | NISS | VERSA SV |
| Job Class 2 | M | 6/3/2015 | | | 1 | Pre Order\$\$\$\$ | 2010 | Chrysler | 300 |
| Job Class 4 | M | 6/3/2015 | | | 0 | Pre Order\$\$\$\$ | 2014 | SCIO | XB |
| Job Class 2 | SA | 7/18/2015 | | | 1 | Pre Order\$\$\$\$ | 2013 | TOYO | TACOMA 4X2 DOUBLE |
| Job Class 4 | SA | 7/18/2015 | | Mark | 0 | Waiting on Estim | 2007 | HOND | ACCORD LX |
| Job Class 1 | TU | 6/9/2015 | | | 0 | Pre Order\$\$\$\$ | 2013 | HOND | CIVIC LX |
| Job Class 4 | M | 6/9/2015 | | | 0 | Body | 2007 | VW | RABBIT |
| Job Class 4 | M | 6/10/2015 | | | 0 | In Paint | 2004 | SUZU | FORENZA EX |
| Job Class 3 | F | 6/5/2015 | | | 0 | \$\$TECHS PAID\$S | 2013 | HYUN | SONATA HYBRID LIMI |
| Job Class 3 | TH | 6/4/2015 | | Car @ B4 | 0 | \$\$TECHS PAID\$S | 2007 | KIA | RONDO LX |
| Job Class 3 | TH | 6/4/2015 | | | 0 | Body | 2014 | HOND | ACCORD EXL |
| Job Class 3 | W | 6/3/2015 | | | 0 | Disassembly | 2011 | Toyota | Yaris |
| Job Class 2 | TU | 6/2/2015 | | | 0 | Pre Order\$\$\$\$ | 2010 | Toyota | Camry |
| Job Class 3 | TU | 6/2/2015 | | | 0 | Pre Order\$\$\$\$ | 2011 | Ford | Fusion |
| Job Class 2 | TU | 6/2/2015 | | | 0 | Q/C - BAR Audit | 2015 | VW | JETTA SE |
| Job Class 4 | TU | 6/2/2015 | | | 2 | Body | 2003 | HOND | ODYSSEY EXL |
| Job Class 8 | M | 6/1/2015 | | | 0 | Pre Order\$\$\$\$ | 2003 | Toyota | 4Runner |
| Job Class 8 | M | 6/1/2015 | | | 0 | Pre Order\$\$\$\$ | 2001 | Chevrolet | Pickup Silverado C1500 |
| Job Class 9 | M | 6/1/2015 | | | 0 | Total Loss | 1997 | LEXUS | SC400 |
| Job Class 1 | M | 6/1/2015 | | | 0 | Pre Order\$\$\$\$ | 2010 | NISS | VERSA S |
| Job Class 2 | SA | | | WTG 087 | | | 1993 | CADIL | FLEETWOOD |
| | | | | | | | 2007 | AUDI | A4 QUATTRO 5-LINE |
| | | | | | | | 2013 | Honda | Accord |
| | | | | | | Pre Order\$\$\$\$ | 2003 | BENZ | E300 |
| | | | | | | Q/C - BAR Audit | 2005 | TOYO | AWALDN LIMITED |
| | | | | | | Q/C - BAR Audit | 2010 | CHEV | CAMARO SS2 |
| | | | | | | | 2011 | SUBA | IMPREZA WRX |
| | | | | | | Body | 2005 | CHEV | TANDE 4X4 271 |

Create "Multiple Views" with different columns that reflect "YOUR" critical information.

Imagine an automatically updated "Release Meeting" whiteboard on the shop floor ALL DAY LONG. That's Terminal.

YOU Choose and Order (Customize) the View. -- Column Options Include:
RO #, Total, Arrival, Scheduled In Date, Day of Week, Scheduled Out Date, Year, Make, Model, Sublet, Flag, Flag Notes, Customer Name, Cust ID, Rental, Deduct, Hat #, Insurance, Sub-Dept, Priority, Job Class, Bdy Tech, Bdy Hrs, Ttl Hrs, Pnt Hrs, Status.

For more information, [CLICK HERE](#) for a complete guide:

www.summitcrs.net/pdf/TerminalGuide.pdf