

SUMMIT SOFTWARE SOLUTIONS



ACHIEVE PEAK PERFORMANCE  
IN YOUR BUSINESS!

# Business Rules Guide

TRAINING AND REFERENCE MANUAL

## Business Rules Tab

**Business Rules** are rules that help customize the way you use Summit. These range from mandatory data required by Summit to create an RO to automatically sending notification e-mails.

Log in to the Summit Administration Module and go to the Company / Business Rules tab

Rule #	Enforce	Action	Impact	POI	Description	Notes
1	<input checked="" type="checkbox"/>	Mandatory Data	Repair Order	Creation	Customer Name	(BLOB)
2	<input checked="" type="checkbox"/>	Mandatory Data	Repair Order	Creation	Customer City, State, Zip	(BLOB)
3	<input checked="" type="checkbox"/>	Mandatory Data	Repair Order	Creation	Customer Phone #	(BLOB)
4	<input checked="" type="checkbox"/>	Mandatory Data	Repair Order	Creation	Vehicle Year, Make, Model	(BLOB)
5	<input checked="" type="checkbox"/>	Mandatory Data	Repair Order	Creation	Vehicle Color	(BLOB)
6	<input checked="" type="checkbox"/>	Mandatory Data	Repair Order	Creation	Vehicle Mileage	(BLOB)
7	<input checked="" type="checkbox"/>	Mandatory Data	Repair Order	Creation	Vehicle License Plate #	(BLOB)
8	<input checked="" type="checkbox"/>	Mandatory Data	Repair Order	Creation	VIN #	(BLOB)
9	<input checked="" type="checkbox"/>	Mandatory Data	Repair Order	Creation	Insurance Company	(BLOB)
10	<input checked="" type="checkbox"/>	Mandatory Data	Repair Order	Creation	Claim #	(BLOB)
11	<input checked="" type="checkbox"/>	Mandatory Data	Repair Order	Creation	Estimator	(BLOB)
12	<input checked="" type="checkbox"/>	Mandatory Data	Repair Order	Creation	Job Source	(BLOB)
14	<input type="checkbox"/>	Mandatory Data	Repair Order	Creation	Calculate Job Total	(BLOB)
15	<input checked="" type="checkbox"/>	Mandatory Data	Repair Order	Creation	Status/Department	(BLOB)
16	<input type="checkbox"/>	InterOffice Mail	Estimator	Login	Overdue ROs	(BLOB)

**Explanation:**  
*Require a customer name when the Repair Order is created.*

Save Cancel

## Enable/Disable Business Rules

You must decide which of these rules you want to use. These rules are designed to help you mirror Summit to operations in your shop. Remember that these rules can be changed at any time, so if you are using a rule that does not fit in to your shop operation, you can always disable that rule. In addition, if you begin using the system and find that enabling one of the business rules will help your shop; you can enable that rule at any time.

To change a Business Rule highlight the Business Rule Line and place a check mark in the box by double clicking (if you want to disable a rule, remove the check mark from the box by double clicking) To save your changes click on any other line or click the Save button.

The following is a list of all business rules and their functions:

<b>Business Rule #</b>	<b>Explanation</b>
1	<i>Require a customer name when the Repair Order is created.</i>
2	<i>Require a customer city, state and postal code when the Repair Order is created.</i>
3	<i>Require customer Phone # when the Repair Order is created.</i>
4	<i>Require a vehicle year, make and model when the Repair Order is created.</i>
5	<i>Require a vehicle color when the Repair Order is created.</i>
6	<i>Require vehicle mileage in when the Repair Order is created.</i>
7	<i>Require vehicle license plate # when the Repair Order is created.</i>
8	<i>Require a Vehicle Identification Number (VIN) when the Repair Order is created.</i>
9	<i>Require an insurance company when the Repair Order is created. Note: An Insurance company called "Customer Pay" should be created for non-insurance jobs. Fleet accounts should also be setup as insurance companies.</i>
10	<i>Require a claim number when the Repair Order is created.</i>
11	<i>Require an estimator name when the Repair Order is created.</i>
12	<i>Require a job source when the Repair Order is created. Note: A job source is defined as a marketing source, i.e.; where did the work originate. Some examples are: Yellow Pages Ad, Referral, Insurance Company, etc.</i>
14	<i>Require that a job be calculated PRIOR to creating the Repair Order. Note: This rule will NOT allow Estimates with a sales total of \$0.00 to be converted to Repair Orders.</i>
15	<i>Require a current job status/department when the Repair Order is created.</i>
16	<i>When the estimator logs in to the system, an interoffice mail will be sent containing a list of ALL open repair orders that have a scheduled out date prior to today's date. For example, if today is December 10th, the email will list all open repair orders with a scheduled out date of December 9th or earlier. This acts as a reminder to the estimator to ensure that vehicles are delivered on-time.</i>
17	<i>This rule will send an interoffice mail to the estimator when parts are marked as back-ordered. Since back ordering parts may cause delays in vehicle delivery, the interoffice mail acts as a reminder to the estimator to determine if the scheduled out date (target) needs to be changed.</i>
18	<i>This rule will send an interoffice mail to the estimator when parts prices are changed. Since parts price changes affect the repair order totals, the interoffice mail acts as a reminder to the estimator to make the necessary changes in the estimating system prices for proper uploading of information to insurance companies if required.</i>
19	<i>This rule will send an interoffice mail to the estimator when the target delivery date for the repair order changes. Since the target date may be changed by production managers or in the shop, the interoffice mail acts as a reminder to the estimator to determine if anyone needs to be notified of the change, i.e.; Customer, Insurance Company, etc.</i>
20	<i>This rule will send an Email to the Customer when the target delivery date for the repair order changes. This automated Email may improve customer satisfaction by keeping the customer notified of changes and improve communications.</i>
21	<i>This rule will send an Email to the Insurance Company when the target delivery date for the repair order changes. This automated Email may improve Insurance Company satisfaction by keeping the Insurance Company notified of changes and improve communications.</i>
22	<i>This rule will send an Email to the Rental Car Company when the target delivery date for the repair order changes. This automated Email may improve Rental Car Company satisfaction by keeping the Rental Car Company notified of changes and improve communications.</i>
23	<i>When a repair order is closed, a follow up appointment is automatically set for the estimator who is responsible for the repair order.</i>
24	<i>Allows repair orders to be Re-Opened. There are very few cases where this would be recommended. Accounting data and other sales information are affected when repair orders are re-opened.</i>

25	<i>This allows anyone to change a target date for a repair order without substantiating the change with a pre-set reason.</i>
26	<i>This will automatically popup the dashboard whenever someone logs into the System module.</i>
27	<i>This will automatically popup the dashboard whenever someone logs into the System module.</i>
28	<i>When an estimate in the management system is synchronized with a third-party estimating system, parts that are in the management system that no longer exist in the estimating system will be automatically returned for credit. Enforcing this rule will not automatically return the parts but instead mark them as deleted. (They will still be visible in the Parts section.) The parts can then be handled on a case-by-case basis.</i>
29	<i>This option allows technicians to use the timeclock without requiring passwords.</i>
30	<i>This option affects several different items: Enforcing this rule will 1) Allow a repair order to be over or under flagged 2) The closing procedure will not require the number or RO hours match the number of Flagged hours in each department. Note: This typically does not apply to hourly shops. If you use flat-rate or commission techs, unenforcing this rule is recommended.</i>
31	<i>This allows a repair order to be closed without requiring that all parts be costed.</i>
32	<i>This imports the insurance company name when importing from estimating systems. This is important to enforce if you want batting average and conversion rate reporting. However, since the estimating systems data may not match the management system, you could end up with disparate data anyway.</i>
33	<i>This imports the estimator name when importing from estimating systems. This is important to enforce if you want batting average and conversion rate reporting. However, since the estimating systems data may not match the management system, you could end up with disparate data anyway.</i>
34	<i>This allows repair orders to be closed by bypassing the closing procedure. While it is quicker, it also lends itself to incorrect and invalidated data in the repair order. Typically, this is NOT recommended.</i>
35	<i>This allow access to line items from the Assignments section. Since many assignments do not have line items, this may not be needed.</i>
36	<i>This sends and interoffice message through the management system whenever the vehicle status is changed and reminds the estimator to take additional photos. This is a simple reminder for shops that want to document the entire repair process.</i>
37	<i>This rule forces the estimated price and Adjusted price to match prior to closing the repair order. This can be used as a double-check if parts price changes are being sent back to the estimating system but is an advanced option which is not recommended for new installations.</i>
38	<i>This forces a cost and sale in each cost center and will not allow the repair order to close if the following conditions apply: 1) There is a sale without a cost. 2) There is a cost without a sale.</i>
39	<i>This will ONLY show parts in the parts section which have "RR" (Remove/Replace) as the labor operation. If you plan to track sublets in the parts section, you will need to mark them as "RR" in the labor operation if using this rule.</i>
40	<i>This allows Work In Process reports to be date selection driven. WIP reports in the management system are typically production driven and not accounting driven. This option is not recommended for production driven reports, however, accounting-based reports will require this rule since they will be based on an As Of date.</i>
41	<i>This rule will force the bypassing of the Repair Order creation process which validates data and workload schedules the repair order. This is not an option which allows either RO method. If this rule is enforced, then the RO validation process is ALWAYS skipped.</i>
42	<i>This allows technicians to move the vehicle into different production departments from TechCentral.</i>
43	<i>This allows the technician to clock into multiple jobs at the same time. Clocking into multiple jobs will evenly split time among each job, ie; if 3 jobs are clocked into, the time worked on those jobs will be split in thirds.</i>
44	<i>This will track all changes made in the system and log them against a specific RO in the System section. It will also track the specific user who made those changes.</i>
45	<i>This allows the technicians to assign themselves to line items in TechCentral.</i>
46	<i>This sends and interoffice message to the Production Manager anytime a target date change is made.</i>

47	<i>This sends and interoffice message to the Customer Service Rep (CSR) anytime a target date change is made.</i>
48	<i>This sends and interoffice message to the Production Manager anytime a repair order is created.</i>
49	<i>This sends and interoffice message to the Parts Manager when a technician is first assigned to a repair order.</i>
50	<i>This allow a technician who has clocked into multiple ROs to clock out of one of them only. Example: A tech is clocked into 3 ROs but finishes one of them and only wants to clock out of that one. If this is done, the time will be evenly divided among the three ROs and then restarted for the remaining two.</i>
51	<i>This sends and interoffice message to the Parts Manager when a vehicle has arrived.</i>
52	<i>This allows users to change dates on accounting transactions that they have access to without a password. Keep in mind that this rule can be enforced and users may still not be allowed access to accounting transactions. This rule is not recommended in shops where accounting data is "swept" in batches on a nightly basis.</i>
53	<i>This option allows the sending of emails through existing Mail Servers such as Exchange. This option requires that additional client software be purchased.</i>
54	<i>This option send data to QuickBooks using the name as the RO#. Shops running multiple locations using QuickBooks may want to enforce this rule.</i>
55	<i>Require a Date of Assignment prior to repair order closing.</i>
56	<i>Require a Date of First Estimate Contact prior to repair order closing.</i>
57	<i>Require a Date of 1st Follow-up prior to repair order closing.</i>
58	<i>Require a Date of 2nd Follow-up prior to repair order closing.</i>
59	<i>Require a Date of Estimate Appointment prior to repair order closing.</i>
60	<i>Require a Date of Vehicle Arrival prior to repair order closing.</i>
61	<i>Require a Date of Customer Authorization prior to repair order closing.</i>
62	<i>Require a Date of Insurance Authorization prior to repair order closing.</i>
63	<i>Require a Date Repair Started prior to repair order closing.</i>
64	<i>Require a Date Vehicle Ready prior to repair order closing.</i>
65	<i>Require a Date of Actual Pickup/Delivery prior to repair order closing.</i>
66	<i>This option forces the showing of Unit #/Hat # in the TechCentral. The RO # will still show. This also makes searching for ROs default to searching by Hat/Unit #.</i>
67	<i>This includes unit #/Hat # on email notifications.</i>
68	<i>This option will disable the popup option which shows a technician the number of RO hours, number of hours clocked and number of hours remaining on the job.</i>
69	<i>This sends and interoffice message to the General Manager when a target date is changed.</i>
70	<i>This rule allows the system to bypass validating the sales and costs for towing. This only is applicable if rule # 38 is enforced. Towing is bypassed in the rule #38 processing.</i>
71	<i>This allows the administrator to change costs with a password AFTER the job has closed.</i>
72	<i>This turns TechCentral into a traditional Punch-In Punch-Out timeclock. It does not keep track of time per RO if this rule is enforced. Shops that Job Cost will NOT want to enforce this rule.</i>
73	<i>This rule pops up a Labor Department selection for a technician when clocking into a job. It comes in handy for techs that perform multiple labor operations on the same repair order.</i>
74	<i>This rule allows parts from multiple cost centers to be ordered and received. Parts received from multiple cost centers will create the appropriate transactions for each cost center.</i>
75	<i>This allows the user to calculate sales tax via the internet. This option should only be used by shops who subscribe to Internet-Based Sales Tax Calculators.</i>
76	<i>This option will allow the technician to view the number of hours for each line item in TechCentral. If this rule is not enforced, the technician will see the line items without the hours. Note: Hours shown in the line items are subject to Labor Allocation options.</i>
77	<i>This rule does not allow manual entry of invoices in Job Cost section or in Parts section. Essentially, it forces all costs to be entered using processes such as TechCentral entry or Parts Invoice Posting.</i>
78	<i>This rule turns OFF the ability to change a parts status in the Parts section manually. With this rule enforced, parts personnel will NOT be able to change parts statuses without a process such as parts ordering, parts receiving or credit processing.</i>
79	<i>This rule turns on department scheduling which affects RO creation and also allows RO department</i>

	<i>re-scheduling and department schedule viewing and printing from the System Module. (Note: Not available in Ascent)</i>
80	<i>Places a follow-up appointment in the CSR's appointment calendar as a follow up reminder set to 7 days after the job closes.</i>
81	<i>This will send an interoffice mail to the Estimator when vehicles are late arriving in scheduled departments. (Requires that Department Scheduling be activated.)</i>
82	<i>This will send an interoffice mail to the CSR when vehicles are late arriving in scheduled departments. (Requires that Department Scheduling be activated.)</i>
83	<i>This will send an interoffice mail to the Production Manager when vehicles are late arriving in scheduled departments. (Requires that Department Scheduling be activated.)</i>
84	<i>This will send an interoffice mail to the General Manager when vehicles are late arriving in scheduled departments. (Requires that Department Scheduling be activated.)</i>
85	<i>Enforcing this rule will treat Shop Pay items the same as insurance pay items. Normally, shop pay items are not added into the job totals.</i>
86	<i>Primarily used for Data Warehousing, this rule will place the name of the Towing Company used, if any, in the Miscellaneous field under the vehicle tab. This takes place if a towing invoice is entered into the system.</i>
87	<i>Enforcing this rule changes the Auto-Flag process in the following manner a) Primary Technicians are NO LONGER used for flagging b) Line Item Allocations are used EXCLUSIVELY for flagging. If this rule is enforced, you should ALWAYS allocate EACH line on EACH repair order.</i>
88	<i>This will send an interoffice mail to the Parts Manager when a Repair Order is created.</i>
89	<i>Enforcing this rule ensures that Closed Repair Orders that have been exported to accounting CANNOT be re-opened. (Even if the Re-Open Business Rule #24 is enforced.)</i>
90	<i>Enforcing this rule will force importing of estimates to update Adjusted List and Additional Labor values rather than Standard List and Labor Hours. This will also enable Supplement Pay Tracking on Repair Orders that will show balances due for each supplement on a Repair Order.</i>
91	<i>This will send an interoffice mail to the Estimator when parts are Automatically Returned during the Synchronization process.</i>
92	<i>This will send an interoffice mail to the Estimator when received parts are Automatically Deleted during the Synchronization process.</i>
93	<i>This will send an interoffice mail to the Parts Manager when parts are Automatically Returned during the Synchronization process.</i>
94	<i>This will send an interoffice mail to the Parts Manager when received parts are Automatically Deleted during the Synchronization process.</i>
95	<i>Enforcing this rule will cause the system to automatically REFRESH the Repair Order list data every 5 minutes without user interaction.</i>
96	<i>Enforcing this rule will show all mandatory data fields which have not been completed after a job calculation from the List view.</i>
97	<i>Require Custom Date # 1 prior to repair order closing.</i>
98	<i>Require Custom Date # 2 prior to repair order closing.</i>
99	<i>Require Custom Date # 3 prior to repair order closing.</i>
100	<i>Require Custom Date # 4 prior to repair order closing.</i>
101	<i>Require a Referral Source when the Repair Order is created. Note: A Referral Source called "N/A" should be created for non-applicable jobs.</i>
102	<i>Enforcing this rule disables the adding of new parts in the parts section. End-Users with estimating system interfaces will enter ALL parts in the estimating system first in this case.</i>
103	<i>Require a CSR when the Repair Order is created.</i>
104	<i>Require that Acceptable Profit % ranges are met prior to repair order closing. Profit % parameters are set in the "Closing Parameters" tab above.</i>
105	<i>Require that the Repair Order is in the LAST Department in the Production View. This rule does not require that all production steps have been taken, only that the RO is in the last production step (department) at the time of close.</i>
106	<i>This will treat sublet as parts in the parts section. Even if Business Rule #39 is enforced the Sublet items will still show in the parts section.</i>
107	<i>Require policy # when the Repair Order is created.</i>
108	<i>This will require parts statuses to fit standard criteria prior to allowing additional parts status changes. ie; Parts that are not ON ORDER could not be RECEIVED. Parts that are not RECEIVED</i>

	<i>could not be RETURNED FOR CREDIT, etc.</i>
109	<i>Enforcing this rule "TURNS ON" the Adjuster Tracking feature which is available in the RO List view by Right-Clicking on the list and selecting "Adjuster Tracking" from the popup menu. This rule also automatically creates an Adjuster Tracking record automatically whenever a Repair Order is created.</i>
110	<i>Require a Rental Car Company when the Repair Order is created.</i>
111	<i>Enforcing this rule will cause the Production view to show SIP #'s that include ALL date ranges. Prior to this business rule, the SIP #'s were calculated based on Month-To-Date.</i>
112	<i>This will send an interoffice mail to the Parts Manager when new parts are added during the Synchronization process.</i>
113	<i>This sends an interoffice message to the Production Manager when a vehicle has arrived.</i>
114	<i>This allows hourly technicians to Auto-Flag hours against a vehicle. Hours auto-flagged will have a cost of ZERO since costing for hourly technicians takes place using timesheets or timeclocks against a Repair Order. This business rule is primarily for use by shops who want to report on hourly technicians using the Flag reports.</i>
115	<i>This will require parts that have been received can ONLY be Credit Returned.</i>
116	<i>When the estimator logs in to the system, an interoffice mail will be sent containing a summary of the aging of Assignments.</i>
117	<i>When the estimator logs in to the system, an interoffice mail will be sent containing a summary of the aging of Estimates.</i>
118	<i>When the estimator logs in to the system, an interoffice mail will be sent containing a summary of the Vehicles due to arrive on the next business day.</i>
119	<i>When the estimator logs in to the system, an interoffice mail will be sent containing a summary of the Vehicles due to be delivered on the next business day.</i>
120	<i>When the Production Manager logs in to the system, an interoffice mail will be sent containing a summary of the aging of Assignments.</i>
121	<i>When the Production Manager logs in to the system, an interoffice mail will be sent containing a summary of the aging of Estimates.</i>
122	<i>When the Production Manager logs in to the system, an interoffice mail will be sent containing a summary of the Vehicles due to arrive on the next business day.</i>
123	<i>When the Production Manager logs in to the system, an interoffice mail will be sent containing a summary of the Vehicles due to be delivered on the next business day.</i>
124	<i>When the General Manager logs in to the system, an interoffice mail will be sent containing a summary of the aging of Assignments.</i>
125	<i>When the General Manager logs in to the system, an interoffice mail will be sent containing a summary of the aging of Estimates.</i>
126	<i>When the General Manager logs in to the system, an interoffice mail will be sent containing a summary of the Vehicles due to arrive on the next business day.</i>
127	<i>When the General Manager logs in to the system, an interoffice mail will be sent containing a summary of the Vehicles due to be delivered on the next business day.</i>
128	<i>This rule forces all Outstanding Credit Returns to be received prior to closing the repair order. All Credit must be received or the RO will not be able to be closed.</i>
129	<i>This rule forces Job Costs to use Burdened Costs when reporting flagged or commissioned labor on reports and in 500 series screens. This rule is NOT retroactive. Only costs entered AFTER enforcement will reflect burdens.</i>
130	<i>This rule forces Labor Allocation to be done by Production Department rather than Labor Type. Labor type allocation is disabled but may still take effect if existing allocations are in process.</i>
131	<i>This rule forces Vendor Invoices to be checked for duplicates upon new entry. A duplicate invoice number or credit memo number for a specific vendor will NOT be allowed with this rule enforced.</i>
132	<i>This rule will hide the calculated parts cost when receiving a parts invoice. Typically, this calculated cost is used as a "check point" but in some cases parts personnel have used this number to provide them with a "quick reconciliation" instead of manually entering the cost for each part line by line. Hiding the calculated cost will help enforce the entering of costs on a line by line basis.</i>
133	<i>Enforcing this rule will eliminate popup warning messages that occur when moving a vehicle through production without labor assignments.</i>