

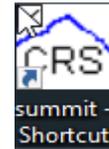
# Summit Basic

TRAINING AND REFERENCE MANUAL

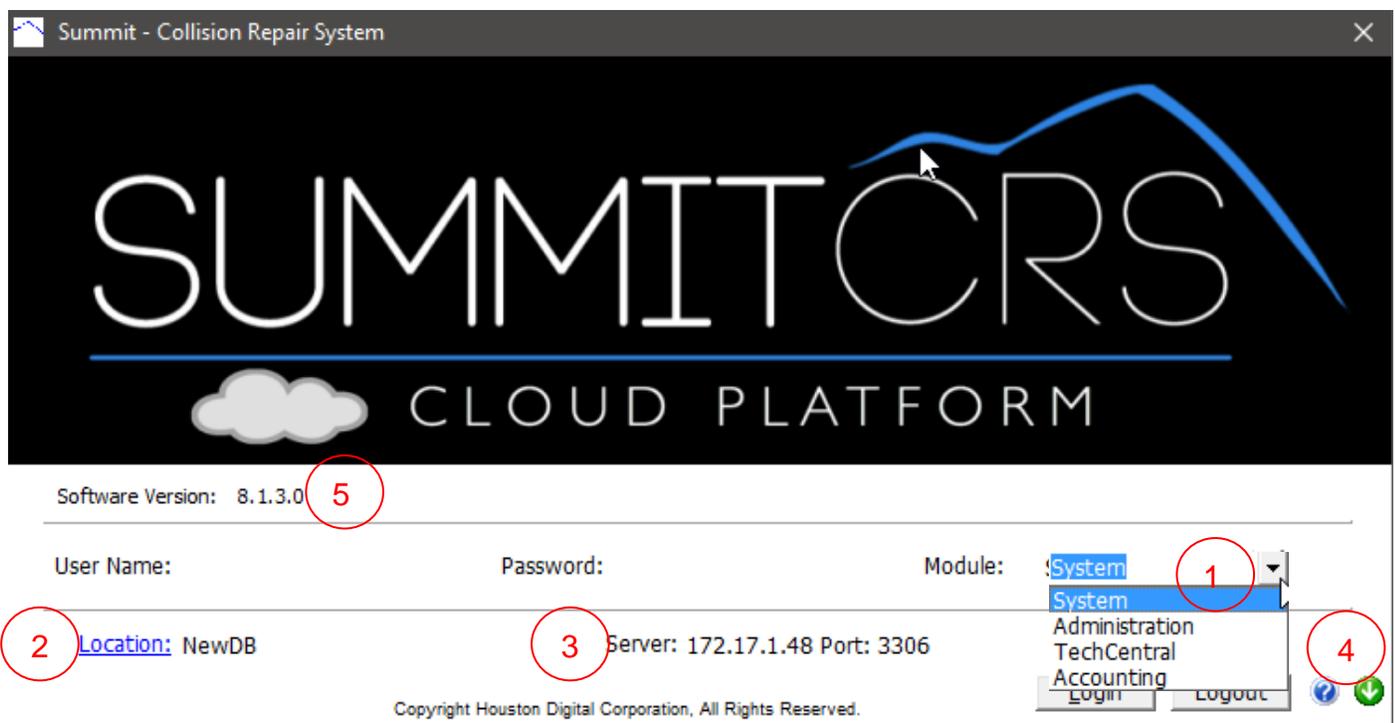
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# Getting Started



- 1) Double Click on the Summit CRS Icon to launch the program
- 2) Summit CRS login screen will pop up. There you will log in with your user name and password.
- 3) Here you will log in to any of the system modules (1) Which are: System, Administration, Tech Central, and Accounting. (Once selected each one will lead to a different screen)
- 4) Other features the Summit login screen has is: (2) **Location** is choosing the location of your auto shop and which database you want to connect with. (3) **Server** shows the IP Address and port number that you need to connect with in order for Summit to be fully functional. (4) This  button is used for quick tech remote access to log into your computer for help. This  button is used for quick access to Summit's support [website](http://www.summitcrs.net) [www.summitcrs.net](http://www.summitcrs.net) (5) **Software Version** shows the latest version of Summit.



# Understanding the RO List View

1. Log in to Summit (System Module)
2. Open the *Open RO's* tab
3. Choose *RO List View* from *ICON* choices on the left side of the screen,

<i>Customer, Vehicle, and other RO related information is always at the top of your screen.</i>	<i>Body, Paint, and Current Tech, on existing Repair Order</i>	<i>Scheduled IN, OUT, and (OP) Original Promise Dates</i>	<i>Vehicle Status, Production "Warning Flag, and Parts Status</i>
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*Jobs, Admin, Line Items, and Job Costs, tabs allow you to "drill down" into selected RO.*

*These icons provide you with access to the Summit Phonebook, Quick Contact, IOU, Calendar, DRP Rules, and Job History features.*

**# of Active RO's**

**Search Status**

**Location Log-in**

*Reports tab provide you with access to dozens of textual and graphical reports.*

**C.O.P.S. unique customizable "control panel" provides each user with quick, easy access to any information on any Repair Order with a single mouse click!**

# CSR / Estimator Daily Responsibilities

Customer Calls and Communication Documentation (incoming, outgoing, and entering notes):

1. Select *RO View* on the left-hand column
2. Click on any name in the *Customer Column*
3. Select the *ESC Key* to clear previous search
4. Begin typing customer name and Summit will locate closest name
5. Once you have located the customer "click on" the *NOTES ICON* and begin entering a note describing your conversation.
6. To enter a note click on *NEW* and begin typing in the *blank area* below the last note.

The screenshot shows a software interface with a main window and a floating 'Job History/Notes' window. The main window displays a list of ROs (Repair Orders) with columns for R.O. #, Sch In, Sch Out, TT, CDR, and Dept/Status. The 'Job History/Notes' window is open over the list, showing a table with columns for Public, Category, User, Date, Time, and Notes. A red circle highlights the 'New' button in the top-left corner of the notes window. Another red circle highlights a blank row in the notes table, indicating where a new note can be entered. Arrows from the numbered list point to these elements.

R.O. #	Sch In	Sch Out	TT	CDR	Dept/Status
48602		10/22/2000	0.00		Body Damage Review
45122	10/10/2013	12/31/2015	0.04	-297	Reassembly
45782	11/10/2014	7/15/2015	0.10	-811	Detail/QC
45985.0	7/4/2015	7/4/2015	0.00		Not Assigned
47925	7/4/2015	7/4/2015	0.11	-278	Body Damage Review
48492	4/20/2015	5/7/2015	0.06	-394	Paint
47345	10/21/2014	7/4/2015	0.00	-580	Body Damage Review
47539	7/4/2015	7/4/2015	0.00		Scheduled In
48020	7/4/2015	7/4/2015	0.00		Scheduled In
47648	7/4/2015	7/4/2015	0.00		Scheduled In
47674	7/4/2015	7/4/2015	0.00		Scheduled In
47683	12/2/2014	7/4/2015	0.00	-539	To Be Assigned
48603	7/4/2015	7/4/2015	0.00		Scheduled In
47758	7/4/2015	7/4/2015	0.00		Scheduled In
47773	12/29/2014	5/15/2015	0.00		Sublet/Mech
48320	5/12/2015	5/13/2015	0.00		Scheduled In
48209	3/12/2015	4/6/2015	0.14	-422	Delivered
48184	4/30/2015	5/6/2015	0.06	-384	Polish
48576	5/18/2015	5/22/2015	0.00		Scheduled In
48356	4/27/2015	5/5/2015	0.08	-385	Delivered
48357	5/6/2015	5/18/2015	0.00		Scheduled In
48252	5/20/2015	6/1/2015	0.00		Scheduled In
48259	4/15/2015	5/11/2015	0.19	-414	Reassembly

Public	Category	User	Date	Time	Notes
<input checked="" type="checkbox"/>		Summit Test Emp	12/9/2015	2:49:37 PM	Begin: Paint(Aaron Lieurance)
<input checked="" type="checkbox"/>		Summit Test Emp	12/9/2015	2:51:18 PM	End: Paint(Aaron Lieurance)
<input checked="" type="checkbox"/>		Summit Test Emp	12/9/2015	2:51:22 PM	Begin: Body(Aaron Lieurance)
<input checked="" type="checkbox"/>		Summit Test Emp	12/9/2015	PM 02:52	End: Body (by SJB)
<input checked="" type="checkbox"/>		Summit Test Emp	12/9/2015	PM 02:52	Begin: Paint (by SJB)
<input checked="" type="checkbox"/>		Summit Test Emp	2/16/2016	PM 08:22	End: Paint
<input checked="" type="checkbox"/>		Summit Test Emp	2/16/2016	PM 08:22	Begin: Polish
<input checked="" type="checkbox"/>		Summit Test Emp	2/16/2016	PM 08:22	End: Polish
<input checked="" type="checkbox"/>		Summit Test Emp	2/16/2016	PM 08:22	Begin: Reassembly
<input checked="" type="checkbox"/>	General	Summit Test Err	5/23/2016	PM 01:47	

# Customer Vehicle Deliveries

**NOTE:** Prior to delivering a vehicle the repair order file must be pre-closed by a Collision Center Estimator OR Manager.

All RO's **MUST be PRE-CLOSED** by the file handler/estimator prior to delivery. Pre-closed being defined as all checks in the Summit Analysis Pre-Close Screen are **GREEN**. If there is a **RED X** you **MUST** correct the RO PRIOR to giving the file to the CSR for delivery. (The above screen depicts an RO that **CANNOT** be given to a CSR to be delivered. All checks **MUST BE GREEN**.)

**Job Closing**

Summary

-  **Profit:** 71.13% (Outside range)
-  **Parts:** All parts have been received.
-  **Credits:** There are no outstanding credit returns pending.
-  **Parts Costs:** All parts have been costed.
-  **Dates:** Some required dates are missing.
-  **Cost Centers:** All cost centers validated or not required.
-  **Price Match:** Not required.
-  **Labor Flags:** Some labor has not been flagged.
-  **Compliance:** All tasks have been completed.
- A/R:** A/R balance is currently \$2,045.42

Once the RO is properly "pre-closed" the following steps should be followed by the CSR.

Upon the arrival of the customer:

1. Review the customer file to ensure ALL paperwork is enclosed.

2. Select **RO View** on the left-hand column

3. Click on any name in the **Customer Column**

4. Select the **ESC Key or Backspace** to clear previous search

5. Begin typing customer name and Summit will locate closest name

6. If the customer has brought payment, the CSR will need to access the **A/R View**. This will launch the **Summit Accounts Receivable** screen.

# Customer Payments

Once you have accessed the *A/R View* it is now time to enter payments:

To enter a payment on a specific RO simply "double click" on the screen line and **the following screen** will appear:

1. Click on the *NEW ICON*

2. Once you have selected new a *new dialog box* will appear

The screenshot shows the 'A/R History for RO#: 19128 (NEWMAN YOLANDA)' window. The 'New' button is circled in red. The main window shows a list of ROs with 'A/R-142' circled in red in the left sidebar. The 'A/R History/Deposits' window has a table with columns: RO #, Sched Out, Name, Estimator, Date, Amount, Method, Reference #, Paid By, Rec'd By, Notes.

RO #	Sched Out	Name	Estimator
19128	8/14/2015	NEWMAN YOL	Yolanda Newm
19136	9/23/2015	Schilling Roger	Jill Rizzo
19184	9/25/2015	Sanda Kelly	Jill Rizzo
19199	3/13/2013	NEWMAN YOL	Yolanda Newm
19219	10/16/2015	ECONOMON L	Yolanda Newm
19224	11/3/2015	BUNKER NIKT	Jill Rizzo
19239	11/13/2015	Erickson Wayn	Jill Rizzo
19251	10/29/2015	2015 NOVEM	Yolanda Newm
19252	11/1/2015	2015 NOVEM	Yolanda Newm
19253	10/29/2015	2015 NOVEM	Yolanda Newm
19260	11/6/2015	PUGACHOV R	FRIDLEY AUT
19265	11/13/2015	NACHATLO J	Rizzo, Jill
19268	11/20/2015	YERKS SAMAN	Jill Rizzo
19272	11/6/2015	NEWMAN YOL	NEWMAN, YO
19273	11/27/2015	KLUENDER TH	Rizzo, Jill
19274	11/27/2015	SZAFLARSKI C	Jill Rizzo
19278	11/16/2015	NACHATLO J	Rizzo, Jill
19281	11/27/2015	KRIENS BERN	Rizzo, Jill
19282	11/24/2015	YOUNGGREN	Rizzo, Jill
19284	11/24/2015	Blake Mark	Jill Rizzo
19285	11/18/2015	ELL THOMAS	Yolanda Newm

Enter in the *Amount, Pay Method, Check #, Paid By, and Notes* related to the payment.

The dialog box is titled 'A/R Payment for RO#: 19184 (Sanda Kelly)'. It contains the following fields:

- Payment Date: 5/24/2016
- Amount: [Empty]
- Apply Payment to: [Empty]
- Pay Method: [Empty]
- Reference #: [Empty]
- Paid By: Customer
- Name of Payee: Sanda Kelly
- Notes: [Empty]

Current Balance: \$272.21  
Deductible: \$0.00

Buttons: Save, Cancel, Scan Payment

# Writing an Estimate and Importing into Summit

## Write an Estimate

1. Create an estimate in your estimating system. Verify that everything is correct in the estimate, and then save it.

**NOTE:** When importing estimate data from ADP, CCC, or Mitchell please beware of the following changes that MIGHT NEED to be made in the Summit RO Line Items under the Type column:

- Flex Additive: Remove R&R and Change to Paint Materials
- Corrosion Protection: Change to Shop Supplies
- Collision Repair Materials: Change to Shop Supplies
- Hazardous Waste: Change to Hazardous Waste
- Tire Tax: Change to NJ or PA Tire Tax
- Cover Car: Change to Paint Supplies
- Anti-Freeze: Change to Shop Supplies
- Bulbs: Change to Shop Supplies
- Pinstripes Tape: Change to Shop Supplies
- Clean Up for Delivery: Change to Shop Supplies

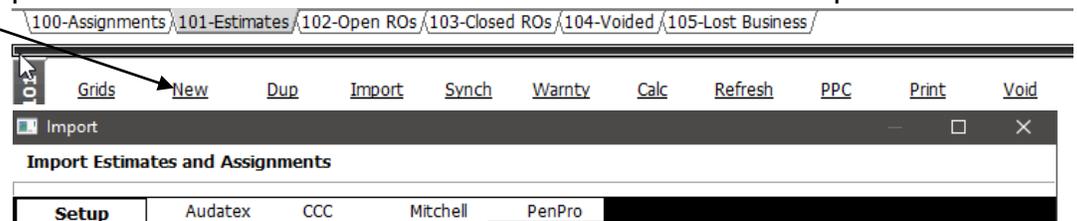
2. Create the export file in the estimating system. In ADP Select File Export, In Mitchell select save and the estimate will automatically export to the EMS folder. CCC has several different EMS export settings.

## Import the Estimate to Summit

1. Log into Summit. (System Module)

2. Open the Estimates OR Open RO's tab and select the RO List view from the drop down menu to the right of the Open RO's tab.

3. Click on "New" to import a new estimate. It is located in the tool bar on the top left side of the screen.



4. From the tool bar across the top of the screen (seen below), choose the estimating system you wrote the estimate in.

5. Choose the estimate from the list by highlighting it

6. Click the IMPORT ICON button in the lower hand of the screen

7. Review the preview screen to ensure that it is the right estimate. Then click the Import button to import

**NOTE:** Once you have imported the estimate go back to the import icon and delete the last estimate you have imported!

The screenshot shows the 'Import' window with the following data:

Name	Year	Make	Model	Total	License
DRAKE STACI	2006	GMC	Yukon XL Denali	\$1,927.92	
EDMOND EDDIE	2011	Mercedes-Benz	C300	\$7,336.37	AEE-7152
LeMoine Maurice	2014	Mercedes-Benz	E350	\$13,793.46	DL8Y23
SPRINK THEODORE	1997	Mercedes-Benz	SL320	\$3,549.13	7AIP453
VASQUEZ JUAN	2007	Infiniti	M35	\$11,629.16	BKVV6031

The 'Import Preview' window shows the following table:

L#	LbrOp	Description	Typ	Price	Adj Price	Lbr Typ	L Hrs	Add Lhrs	R Hrs	Add RHrs	Part #	Status
1	RF	Rear Bumper Cover				R			2.4			
2	OV	Rear Bumper Assy				B	1.9					
3		Rear Add w/Trailer Hitch				B	0.3					
4	RR	Rear Bumper Face Bar	NW	\$721.37		B					19121287	GM
5	RR	R Rear Bumper Step Pad	NW	\$150.77		B					15062869	GM
6	RR	L Rear Bumper Step Pad	NW	\$157.57		B					15062868	GM
7	RR	Rear Ctr Bumper Step Pad	NW	\$287.43		B					15152671	GM
8		FLEX ADDITIVE	AM	\$7.32		R						
9	RP	Rear Bumper Cover				B	2					
10		Hazardous Waste Disposal	HW	\$4.00					1			
11	AD	Clear Coat				R						
12		Paint/Materials	PM	\$102.00								

## Totaling the Estimate

1. After the estimate has been imported, click the Estimates tab and highlight the estimate. It will be the first estimate in the list. Calculate the estimate by clicking the Quick Job Calculation button located in the menu bar above the list of estimates or repair orders.

**IMPORTANT NOTE:** Each estimate MUST be calculated before another estimate is imported.

2. Click the Line Items button at the top of the screen to view and verify the line items are correct. It is VERY important to review the line items of the estimate to insure they match the estimating system and to make any changes to lines that need a part type change (i.e.: shop supplies, etc) or need Hours Changed to \$ for sublet purposes. If you make a change to a line item and you would like to "protect" the LaborOp, Part Type, or any other changes that were made, select Locked from the Pay Column and the changes you made to the line item WILL NOT change upon Synchronization.

The screenshot shows the following summary information:

- Est #: 6110, RO #: 19184, Est Nm: Jill Rizzo, Ins Co: U.S.A.A., Deduct: \$0.00
- Sanda Kelly, 2003 Lincoln Town Ca
- B Tech: , P Tech: , C Tech:
- Sch In: 9/21/2015, OP: 9/25/2015, Sch Out: 9/25/2015, Rpr Start: 9/21/2015
- Status: INS/Final Supp Appro
- Contact: None
- Warning:
- PARTS: 4 (0 Green, 4 Yellow, 0 Red, 0 Blue, 0 Purple, 0 Orange)

The 'Line Items' table is as follows:

#	LbrOp	LbrTyp	Description	Type	Retail	LbrHrs	PntHrs	Part #	Pay
0	Repair	Body	Door Shell,Rear LT			1.0		REPAIR	
2	Refinish	Refinish	Door Shell,Rear LT				2.9	REFINISH	
3	Remove/Install	Body	Mldg,Rear Door Scalp L/R			0.3		R&I ASSEMBLY	

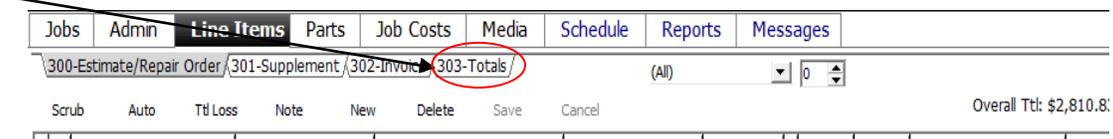
#	LbrOp	LbrTyp	Description	Type	Retail	T	LbrHrs	PntHrs
1	Repair	Body	Door Shell,Rear LT			<input type="checkbox"/>	1.0	
2	Remove/Replace	Refinish	Door Shell,Rear LT			<input type="checkbox"/>		2.9
3	Repair	Body	Mldg,Rear Door Scalp L/R			<input type="checkbox"/>	0.3	
4	Overhaul	Body	Mldg,Rear Door GarnishL/F			<input type="checkbox"/>		
5	Remove/Install	Body	Mldg,Rear Door Side LT			<input type="checkbox"/>	0.4	
6	Additional Labor	Body	Pnl,Inner Door Trim LT			<input type="checkbox"/>		
7	Align	Body	Rear Vent Glass R & I LT			<input type="checkbox"/>	1.3	
8	Access/Inspect	Body	Handle,RR Door Outer LT			<input type="checkbox"/>	0.5	
9	Remove/Install	Body	Mldg,Roof Drip LT	New	\$49.63	<input checked="" type="checkbox"/>	0.9	
10	Remove/Replace	Refinish	Mldg,Roof Drip LT			<input type="checkbox"/>		0.4
11	Repair	Body	Pnl,Qtr (in Window Opn LT			<input type="checkbox"/>	13.0	
12	Refinish	Refinish	Pnl,Qtr (in Window Opn LT			<input type="checkbox"/>		4.8
13	Repair	Body	Door,Fuel Filler LT			<input type="checkbox"/>	0.3	
14	Refinish	Refinish	Door,Fuel Filler LT			<input type="checkbox"/>		0.4

**NOTE:** Labor Operations, Labor, Pay, and Part Types can be changed within the Summit Line Items screen. Simply "click on" the field and a "drop down" box appears. You can also change descriptions, prices, and labor time within this screen. If you want to retain these changes you must select locked from the pay column.

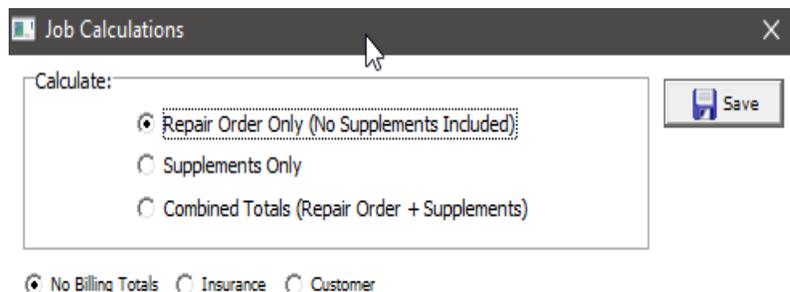
When importing estimate data from ADP or CCC please beware of the following changes that **MUST BE** made in the Summit RO Line Items, TYPE column:

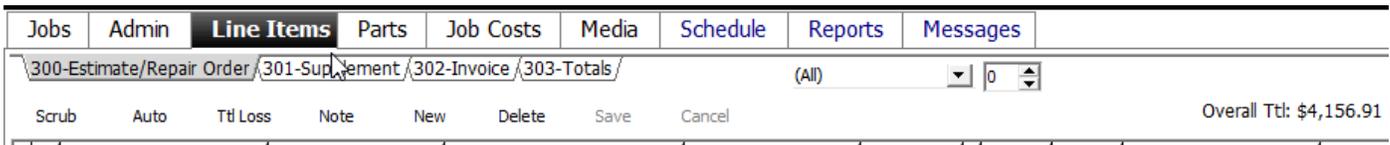
- Flex Additive: Remove R&R and Change to Paint Materials
- Corrosion Protection: Change to Shop Supplies
- Collision Repair Materials: Change to Shop Supplies
- Hazardous Waste: Change to Hazardous Waste
- Tire Tax: Change to NJ or PA Tire Tax
- Cover Car: Change to Paint Supplies
- Anti-Freeze: Change to Shop Supplies
- Bulbs: Change to Shop Supplies
- Pinstripes Tape: Change to Shop Supplies
- Clean Up for Delivery: Change to Shop Supplies

3. When you have completed any changes and are ready to check your totals "click on" the Totals tab.



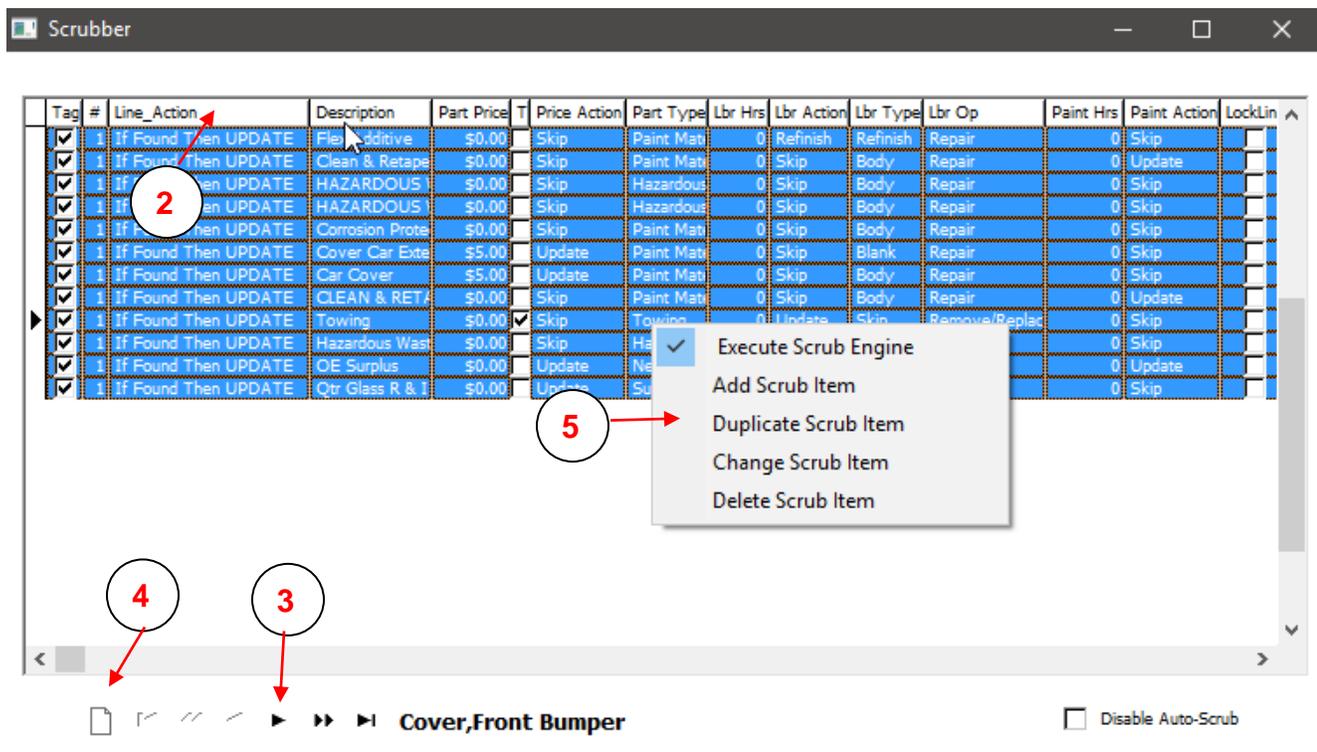
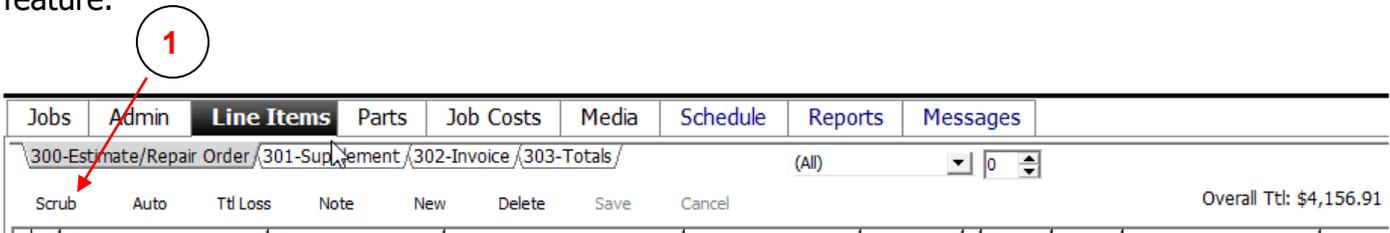
4. Select Estimate Only option from the options that appear, and click Save. Verify the totals.





## Scrubbing the Estimate

An automated scrubber is now available in the Line Items tab. The scrubber allows you to automatically add or change your RO line items. Left click on the scrub icon (1) to open this feature.

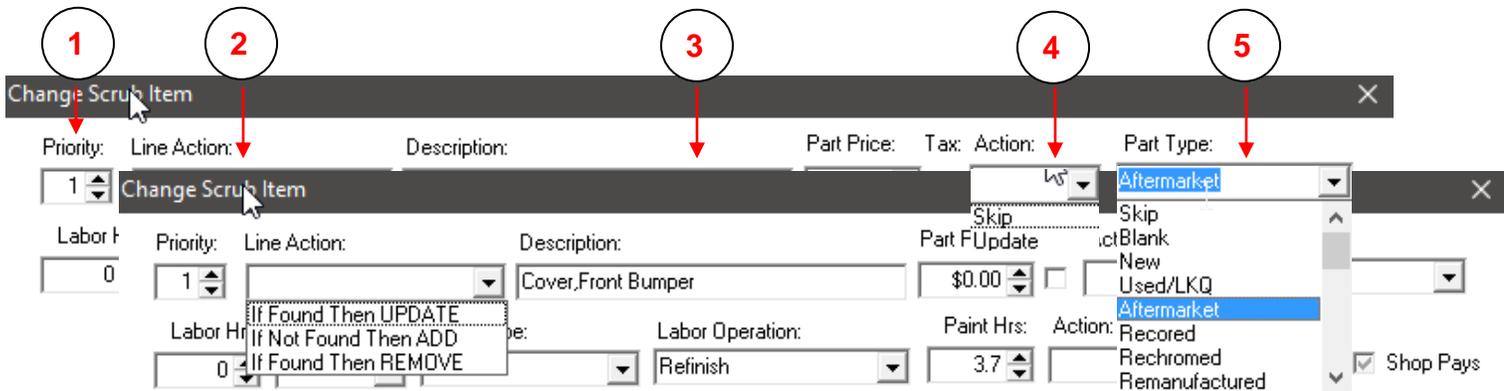


Once in the Scrubber, you will see your list of Scrub Items (2).

Use the arrows at the bottom of the screen (3) to add a Scrub Item base cycle through line items. Arrow over to the desired line item and select the new button (4) to add the Scrub Item.

You can also Add, Change, Delete, or Execute your Scrub Items by right clicking on your current Scrub Items. (5)

When you select the New Button, Add Scrub Item, or Change Scrub Item, you will be taken to the Change Scrub Item screen:



You will find several options that are the same in most of the drop down boxes. **Skip** will leave the field untouched, as imported from the estimating system. **Blank** will erase what has been



imported from the estimating system, leaving the field empty.

If you use the new button to add an existing line, most of the information will be filled out for you, as shown above.

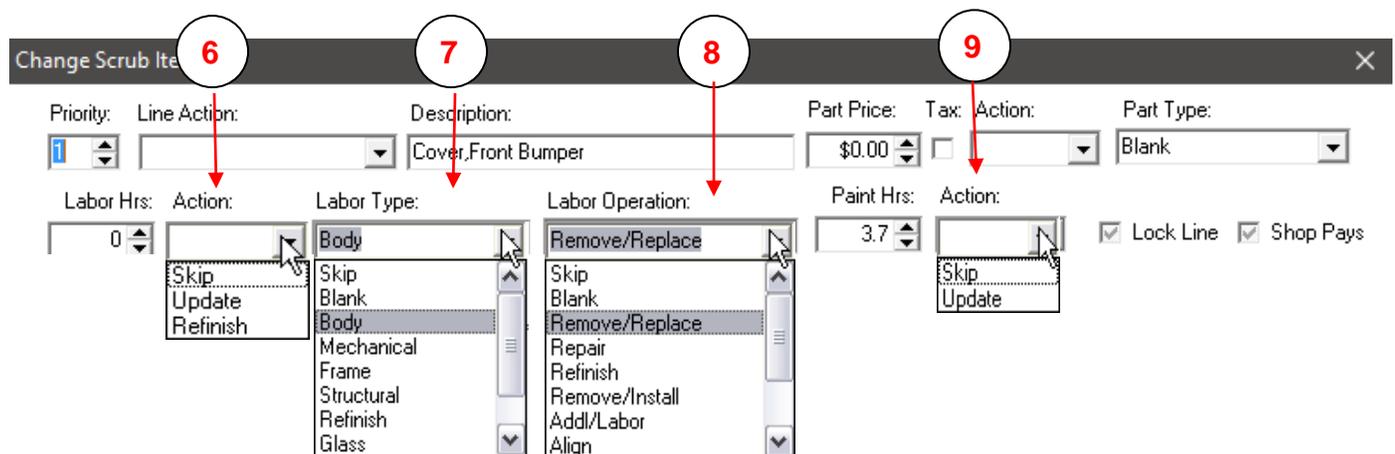
The Priority number (1) shows the order the Scrub Items are executed in.

The three options available in Line Action (2) determine what the Scrub Item will accomplish.

Your Description (3) needs to match the way it will be imported from your estimating system.

Each Action (4) box applies to the numeric value entered just before it.

You can set the line's Part Type (5) to be anything in the drop down list.



The Refinish option under the Labor Hrs Action box (6) will transfer any hours you have entered to Refinish Labor.

Labor Type (7) and Labor Operation (8) can be set to anything in the drop down list.

The Paint Hrs Action (9) also applies only to the numbers entered in the Paint Hours box before it.

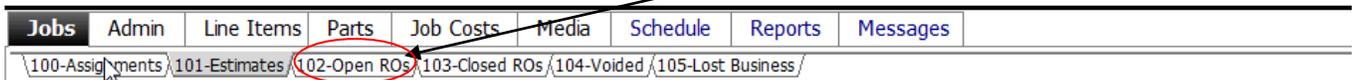
# Creating a Repair Order with an Estimate

Now that your estimate has been imported and calculated, you can create a Repair Order.

1. "Click on" the *Jobs Tab* and your estimate will be visible in the estimate list.



2. Select the Estimate, "Left Click" and "Drag" it up to the *Open RO's Tab*.



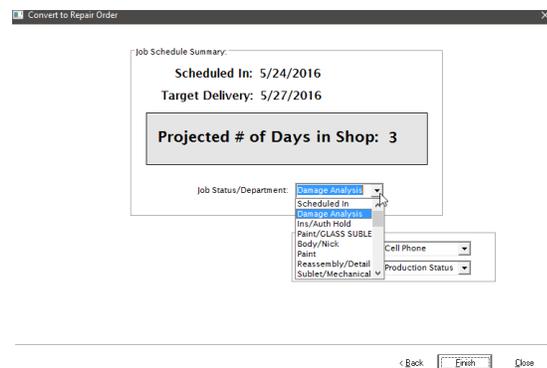
3. Once you "drag" it up, the Summit "RO Wizard" appears. The following screens will appear. Please fill in all fields with a **RED \*** select Next when you have completed the appropriate fields.

4. The *Job Data* window provides you with information related to the repair dollars and hours, Insurance Company and Claim information as well as areas to enter in the estimator, actual RO creation data, and how many hours per day you or your insurer would like to spend repairing the

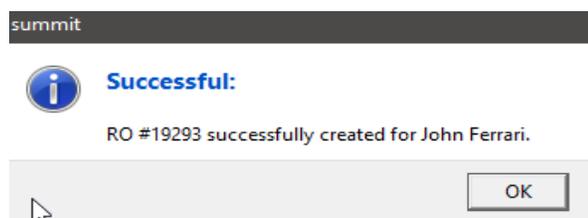
vehicle. This helps in the scheduling process.

**NOTE:** Summit can automatically "classify" your repairs if you have set up your Repair Classification profile in the Summit System Administration module.

5. Choose current status/dept., click finish, and then click close. The system will assign an RO number and then tell you what the new RO number is. The RO can now be found under the open RO's tab. (it *should* be the first RO in the list)



6. Once you have successfully completed the RO Wizard Process Summit will generate your *Repair Order #*.

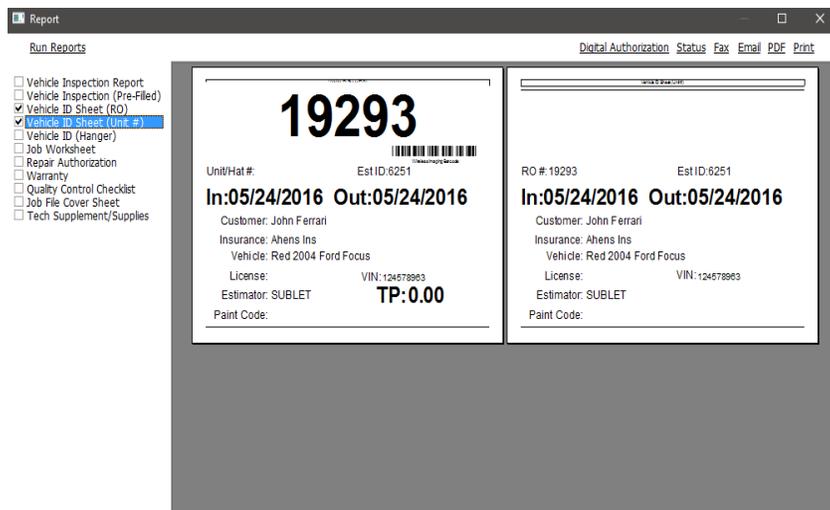


## Print the RO Document Pack

1. Find the RO that was just created in the *Open RO's* tab, highlight it and right click. Choose *Reports*. This will bring up a menu that will allow you to choose to print any or all of the following reports/forms:

- Vehicle Inspection
- Vehicle Identification Report
- Vehicle ID Sheet (RO)
- Vehicle ID Sheet (Unit #)
- Job Worksheet
- Job ID (Hanger)
- Job Worksheet
- Repair Authorization
- Warranty
- Quality Control Checklist
- Job File Cover Sheet
- Tech Supplement/Supplies

2. Click *Print* to preview each report, and then print the reports.

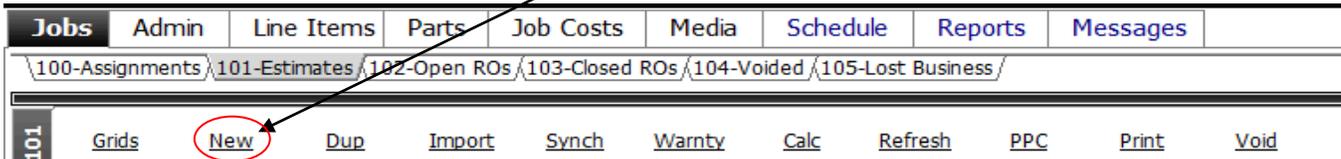


**NOTE:** Once you have selected the report(s) you would like to print from this print box, or others, Summit will remember the reports so you **DO NOT** have to re-select them in the future.

# Without an Estimate (Towed Vehicles)

## Moving an Estimate to the Open RO List

1. Click the *Estimates* tab and Select the **NEW ICON**.



2. Follow the screens below and complete the forms in their entirety.

**Create New Assignment**

Customer Name: Collision  
 Insurance Co.: Allied Ins  
 Vehicle Year: 2009  
 Make: Ford  
 Model: F150

Hint: After clicking on Finish - select the Admin Tab and complete information such as assignment date, phone #'s, etc.

< Back Finish Cancel

**Create New Estimate**

Customer Name: John Ferrari  
 Insurance Co.:  
 Vehicle Year: 2004  
 Make: Ford  
 Model: Focus

Hint: After clicking on Finish - select the Admin Tab and complete information such as assignment date, phone #'s, etc.

< Back Finish Cancel

3. After you complete the basic *Customer Information Screen* the system will take you directly to the detailed *ADMIN* section for that Repair Order. Beginning with the *Customer Tab*, and working "left to right", simply fill out all the appropriate information in each tab and "click on" the *SAVE ICON* when you are completed.

Estimate #: 6253 Customer ID: Billing Code:

Name/Company: John Ferrari Home Phone:

Contact: Work Phone:

Address 1: Cellular Phone:

Address 2: Fax/Pager:

City: St/Prov Postal Code:

E-Mail Address: Communications: None

SMS:

4. After *SAVE*, "click on" the *Jobs Tab* and your estimate will now be visible in the estimate list.

The screenshot shows the 'Jobs' tab selected. The top section displays details for Estimate # 6253, Customer John Ferrari, and vehicle 2004 Ford Focus. Below this is a summary bar with 'PARTS: 0' and a row of colored status indicators. The bottom section is a table with columns: R.O.#, Sch In, Sch Out, TT, CDR, Dept/Status, Job Class, Total, Ins, Estimator, Customer, Est #, Year, Make, Model, Lic #, VIN, Claim #, CSR.

R.O.#	Sch In	Sch Out	TT	CDR	Dept/Status	Job Class	Total	Ins	Estimator	Customer	Est #	Year	Make	Model	Lic #	VIN	Claim #	CSR
0		1/1/1900	0.00		Not Assigned		\$0.00			John Ferrari	6253	2004	Ford	Focus				
0		12/30/1899	0.00		Not Assigned	Same Day Repair	\$0.00	Acuity Ins	SUBLET	John Smith	6252	2004	Ford	Focus		123456789		
0					Not Assigned		\$0.00	AAA		John Doe	6242							

5. Select the Estimate, “Left Click” and “Drag” it up to the *Open RO’s Tab*.

6. Once you “drag” it up the Summit “RO Wizard” appears. The following screens will appear. Please fill in all fields with a **RED \*** select Next when you have completed the appropriate fields.

7. The *Job Data* window provides you with information related to the repair dollars and hours, Insurance Company and Claim information, as well as areas to enter in the estimator, actual RO creation data, and how many hours per day you or your insurer would like to spend repairing the vehicle. This helps in the scheduling process.

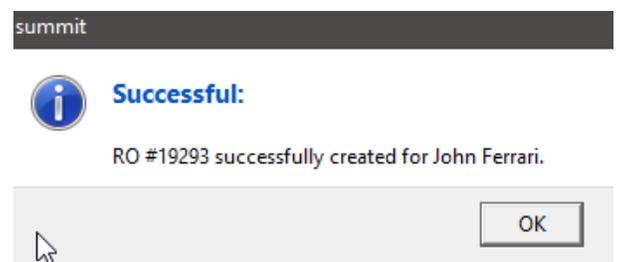
**NOTE:** Summit can automatically “classify” your repairs if you have set up your Repair Classification profile in the Summit System Administration module.

On tow-ins select *Bypass Scheduling*.

8. Choose *Current Status/Dept.*, click *Finish*, and then click *Close*. The system will assign an RO number and then tell you what the new RO number is. The RO can now be found under the *Open RO’s* tab (it SHOULD be the first RO in the list).

**NOTE:** For Tow-in’s select *Vehicle Here Dept.*

9. Once you have successfully completed the RO Wizard Process Summit will generate your *Repair Order #*.



# Printing the RO Document Pack

1. Find the RO that was just created in the *Open RO's* tab, highlight it and right click. Choose *Reports*, then click *RO Pack*. This will bring up a menu that will allow you to choose to print any or all of the following reports/forms:

- Vehicle Identification Report
- Job Worksheet
- Repair Authorization
- Warranty
- Quality Control Checklist
- Job File Cover Sheet
- Tech Supplement/Supplies

Est #: 6222      SZAFARSKI DEBRA      B Tech:      Sch In: 11/12/2015      Status:      Ins/Auth Hold      Contact: None  
 RO #: 19274      2010 Ford Fusion      P Tech:      OP: 11/27/2015      L      Notes  
 Est. Nbr: Jill Rizzo      C Tech:      Sch Out: 11/27/2015  
 Ins Cos: State Farm Ins.      Rpr Start:      Warning:  
 Deduct: \$500.00      Images: 0      PARTS: 2      0      2      0      0      0      0      0

Jobs    Admin    Line Items    Parts    Job Costs    Media    Schedule    Reports    Messages

100-Assignments/101-Estimates/102-Open ROs/103-Closed ROs/104-Voided/105-Lost Business/

Locate    Late    IOU    Returns    Refresh    Print    (All Parts Statuses)

Sch Out	R.O. #	Customer	Ins	Year	Make	Model	Parts	Ord	Rec	BO	Ret	OCR	Claim #	CSR
12/2/201	19288	SABALLY L	State Farm Ins.	2011	Honda	Pilot	3	0	0	0	0	0	23-764L-34801	
11/24/20	19287	Blake-REN'	Western National	2007	Hyundai	Sonata	1	0	0	0	0	0	03006682459	
11/25/20	19286	Voss Kevin	Selective Service	2011	Ford	Edge	7	0	3	0	0	0	21582572	
11/18/20	19285	ELL THOM	State Farm Ins.	2000	Chevrolet	Silverado K25 HD	1	0	1	0	0	0	23-7L15-40501	
11/24/20	19282	YOUNGRI	State Farm Ins.	2005	Toyota	Sienna	27	0	24	0	1	2	23-763N-03301	
11/27/20	19278	KRIENS BE	State Farm Ins.	2006	Volkswagen	Jetta	0	0	0	0	0	0	23-7M30-65202	
11/16/20	19276	NACHATIL	Self Pay	2005	Chevrolet	Malibu	0	0	0	0	0	0		
11/27/20	19274	SZAFARSKI	State Farm Ins.	2010	Ford		2	0	2	0	0	0	23-762K-03701	
11/27/20	19273	KLUENDER	State Farm Ins.	2006	Ford		14	0	0	0	0	0	13-7L84-67401	
11/6/201	19272	NEWMAN Y	State Farm Ins.	2006	Ford		1	0	1	0	0	0	23-7L74-43102	
11/20/20	19268	YERKS SAJ	State Farm Ins.	2008	Ford		13	0	9	0	2	2	23-7L00-61001	
11/13/20	19265	NACHATIL	State Farm Ins.	2005	Ford		27	1	15	0	3	3	23-756K-79001	
11/6/201	19260	PUGACHO	Esumace	2005	Toyota	Avalon	2	0	1	0	0	0	WIS-0067874-01	
10/29/20	19251	2015 NOV	Shop Supplies	2015	Shop Supplies	Shop Supplies	3	0	0	0	0	0		
10/29/20	19253	2015 NOV	Monthly Cost Ma	2015	LIQUID	LIQUID	0	0	0	0	0	0		
11/1/201	19252	2015 NOV	Monthly Cost Ma	2015	Allied	Allied	0	0	0	0	0	0		
11/13/20	19239	Ericksen W	Self Pay	2006	Ford	Ranger	49	0	29	0	1	2		
11/3/201	19224	BUNKER WJ	American Family	2010	Ford	Fusion	44	0	40	0	3	1	00345127156-0C	
10/16/20	19219	ECONOMC	Selective Service	2012	Nissan	Altima	15	0	13	0	2	0	21575216-1	
3/13/201	19199	NEWMAN Y	Self Pay	2003	Ford	Taurus	5	0	5	0	0	0		
9/25/201	19184	Sanda Kelly	U.S.A.A.	2003	Lincoln	Town Car	4	0	4	0	0	0	01161984200000000000	
9/23/201	19136	Schilling R	Grinnell Select	2001	Toyota	Tacoma	16	0	12	0	4	0	SND0007921	
8/14/201	19128	NEWMAN Y	Progressive Insu	1999	Mitsubishi	Eclipse	1	0	0	0	0	0		

2. Click *Print* to preview each report, and then print the reports.

**NOTE:** Once you have selected the report(s) you would like to print from this print box, or others, Summit will remember the reports so you DO NOT have to re-select them in the future.

Report

Run Reports      Digital Authorization    Status    Fax    Email    PDF    Print

- Vehicle Inspection Report
- Vehicle Inspection (Pre-Filled)
- Vehicle ID Sheet (RO)
- Vehicle ID Sheet (Unit #)
- Vehicle ID (Hanger)
- Job Worksheet
- Repair Authorization
- Warranty
- Quality Control Checklist
- Job File Cover Sheet
- Tech Supplement/Supplies

19293

Unit/Hat #:      Est ID: 6251

In: 05/24/2016    Out: 05/24/2016

Customer: John Ferrari  
 Insurance: Ahens Ins  
 Vehicle: Red 2004 Ford Focus  
 License:      VIN: 124578963  
 Estimator: SUBLET      TP: 0.00  
 Paint Code:

RO #: 19293      Est ID: 6251

In: 05/24/2016    Out: 05/24/2016

Customer: John Ferrari  
 Insurance: Ahens Ins  
 Vehicle: Red 2004 Ford Focus  
 License:      VIN: 124578963  
 Estimator: SUBLET  
 Paint Code:

# Parts Management

**NOTE:** Parts can account for over 50% of your revenues so it is VERY important to implement controls for all aspects of the parts procurement process.

## The Summit Parts View

The Summit Parts View has been designed to provide your collision repair facility with the easiest, yet most complete parts management system available.

*Scheduled In and Out Dates,*  
*Parts Status Filters,* combined with *Color Coded Parts Statuses* insures accurate, up to the minute parts management and control!

The *Parts View* menu includes the ability *Locate Parts*, view *Late Parts*, *IOU's*, *Refresh* your connection to the Summit Server, and *Print* Parts related reports.

## Locating Parts

To Locate Parts that you have on an RO or have received from a vendor:

1. "Click on" the Locate link and Summit will launch the search screen below.
2. Enter in the part # or Vendor Invoice # and Summit will display the RO#, Vendor Code, Vendor Invoice #, Part #, Cost, and Description. Please beware that to locate a part, the part # or invoice number MUST BE an exact match.

## Late Parts

To locate *Late Parts*, "click on" the *Late Parts ICON*. Summit will display a list of late parts and parts on order based on an "as of date". This feature will help you identify parts that are late or have been ordered.

PO #	Ordered	Date Due	Description	Price	Part #	Vendor
15728-3	5/28/2009	5/29/2009	Pinstripes-Tape		15 ECONOMY PART	FRIDLEYAUT
15728-3	5/28/2009	5/29/2009	Cover Car Exterior		5 ECONOMY PART	FRIDLEYAUT
15724-6	6/9/2009	6/10/2009	Cover Car Exterior		5 ECONOMY PART	FRIDLEYAUT
16000-1	1/20/2010	1/21/2010	RT AIR DUCT INLET RETAINER	3.96		FRICHEV
16000-1	1/20/2010	1/21/2010	LT AIR INLET DUCT RETAINER	3.96		FRICHEV
16111-1	4/14/2010	4/15/2010	Pinstripes-Tape		30 ECONOMY PART	FRICHEV
16148-1	5/12/2010	5/13/2010	SHOP MATERIALS		34 ECONOMY PART	TOUSLFORD
16200-2	6/24/2010	6/25/2010	Door,Fuel Filler RT	72.9	22603019	FRICHEV
16200-1	6/24/2010	6/25/2010	Wheel,Rear RT	179	RECONDITIONED PART	KEYSTONE
16245-2	8/5/2010	8/6/2010	Refrigerant		20 ECONOMY PART	WZTNISSAN
16261-1	8/10/2010	8/11/2010	Sealant Kit,Qtr Glass LT		25 ECONOMY PART	LUTOYSCIO
16438-1	1/4/2011	1/5/2011	Hazardous Waste Removal		5 SUBLET REPAIR	SUBURBAN
17196-1	10/1/2012	10/2/2012	Hazardous Waste Removal		5 SUBLET REPAIR	SUBURBAN
17811-3	9/9/2013	9/9/2013	Panel,Front End	300.35	6W7Z8190A	
19090-10	9/8/2015	9/9/2015	APPLIQUE		0	AUTONATIO
19265-3	11/11/2015	11/11/2015	Cover,Front Bumper		276 PXN RECONDITIONED	

# IOU's

There are many situations where a collision repair facility delivers a vehicle that still needs a molding, label, or other small part that is not crucial to the repair but still needs to be tracked and delivered to the customer. Summit's *IOU* tracking system provides collision repairers with an easy to use, proactive methodology to improve customer satisfaction and communications. To see what outstanding IOU's you have in your business "click on" the *IOU* *ICON* and Summit will launch the screen below:



IOU Management									
Total # IOU's	Need To Be Ordered:	Waiting For Arrival:	Needs To Be Installed:						
92	36	41	15	<a href="#">Re-Count</a>					
Since	RO	Estimator	Name	Phone	Owed	Ordered	Received	Installed	
4/13/2009	15684	Yolanda Newman	MOHAMED SAA	(763)788-5423	SPOILER A/M DECALS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4/13/2009	15684	Yolanda Newman	MOHAMED SAA	(763)788-5423	A/M FOGLAMP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
10/1/2010	16273	Patty Netzinger	CLARK EMIL B	(763)784-2431		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
12/27/2010	16377	Yolanda Newman	CARUSO FRANI	(612)282-1380	PROTECTIVE FILM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
1/24/2011	16454	Patty Netzinger	WHITE JAMES	(651)636-4865	Decal,Front Door LT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
1/24/2011	16454	Patty Netzinger	WHITE JAMES	(651)636-4865	Decal,Front Door LT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4/26/2012	16868	Yolanda Newman	Welch Edna	763-571-2899	clear guard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5/2/2012	16982	Jill Rizzo	Doherty Rick	952-500-1624		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5/2/2012	16969	Jill Rizzo	NUGENT MOLL	763-571-4779		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5/2/2012	16987	Jill Rizzo	MAY CAROL	(763)493-5198		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
5/2/2012	16952	Jill Rizzo	Marshall Judy	7632422574		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
5/2/2012	16967	Jill Rizzo	GARY SCOTT	(612)850-6529		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
5/2/2012	16968	Jill Rizzo	OATES KENNE	612-501-4091		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5/11/2012	16953	Jill Rizzo	Zamora Doug/C	(612)590-3133		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
6/28/2012	17055	Jill Rizzo	ENGSEETHER I	(763)571-9115	paint protection-rosedale cl	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
7/30/2012	17100	Jill Rizzo	Blake Mark	(763)571-8254	Clear Guard Hood	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
7/30/2012	17100	Jill Rizzo	Blake Mark	(763)571-8254	Visor install	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2/24/2013	17469	Yolanda Newman	Bostrom Steven	612-978-1555	Bedside Decal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
7/3/2013	17705	Jill Rizzo	Mcgrath Brian/S	(763)438-9266 xS	4 door belt moldings, Rt Qt	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
7/5/2013	17684	Yolanda Newman	MARTONIK RIC	(763)434-7324	RT tail light	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
7/19/2013	17722	Jill Rizzo	JONES MARSH	763-331-5212		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
7/31/2013	17074	Jill Rizzo	NYQUIST GARY	(612)418-0430	SHOCK ABSORBER IS LE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
7/31/2013	17124	Jill Rizzo	Oviasu Dami//AI	(763)439-9155	HEADLAMP KEEPS BURN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

By selecting the Print ICON in the Parts, Summit allows you to print the following reports:



- Open RO's Parts Report
- Photo Report
- Missing reports names

Report

Run Reports Digital Authorization

- Open RO Parts Summary**
- Parts To Be Ordered
- Open POs (Vendor)
- Parts On Order (Vendor)
- Back Ordered POs (Vendor)
- Back Ordered Parts (Vendor)
- Late Parts (Vendor)
- Late Parts (Estimator)

Fridley Auto Body

**Open RO Parts Summary**

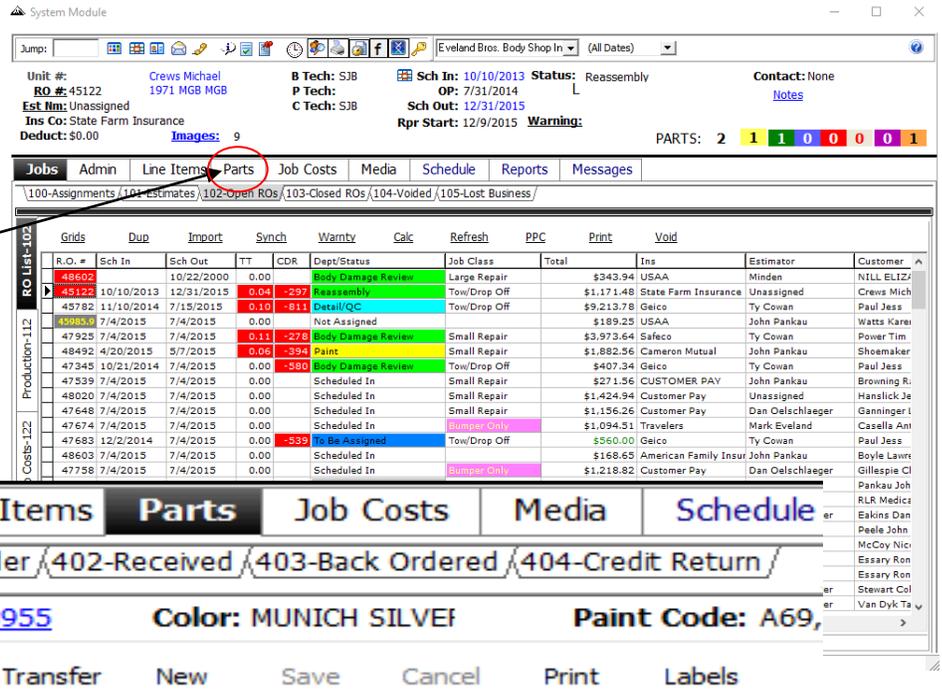
Sched Out	RO #	Customer	Insurance	Vehicle	Parts	Ord	Rec	BO	Ret	OCR	SUB	Late
09/14/2015	19184	Sanda Kelly	U.S.A.A.	2003 EBONY Lincoln Town Car	4	0	4	0	0	0	0	0
09/10/2015	19186	Schilling Roger	Grinnell Select	2001 IMPULSE RED PRL	16	0	12	0	4	0	0	0
09/16/2015	19128	NEWMAN YOLANDA	Progressive Insurance	1999 MUNICH SILVERMET (through Eclipse	1	0	0	0	0	0	0	0

Summary	
# of Parts:	243
# on Order:	1
# of Rec'd:	162
# on Back Ordered:	0
# of Sublets:	16
# Late:	1
# of Returned (Rec'd Credit):	16
# of Outstanding Credit Returns:	17

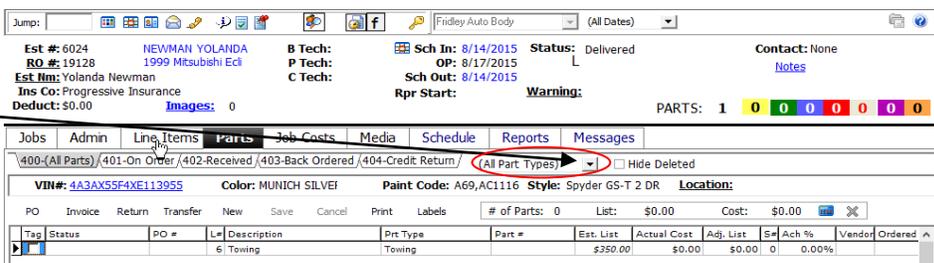
# Ordering Parts

1. Click on the *Open RO's* button and choose the *RO List* view
2. Highlight the RO that parts will be ordered for.
3. Click the *Parts* button.

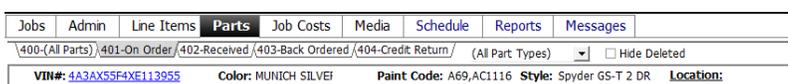


The RO Parts Menu provides the user with the following options: *Order Parts, Receive Parts, Backorder, Select and Print Purchase Orders, Enter Invoices, Return Parts, Transfer Parts Costs, Enter New Parts on RO's, Print Parts Reports and Labels.*

4. Verify that all parts are under the All Parts tab
5. Select the "Part Type" that you need. This filters out all other "Part Types".



6. "Tag" the parts to be ordered by putting a check mark in the box located to the left of the part name (it is in the *Tag* column)
7. Click-and-drag ONE of the parts that were tagged up to the *On Order* tab.



**IMPORTANT NOTE:** By clicking-and-dragging ONE tagged part to the *On Order* tab, you move ALL tagged parts to the *On Order* tab.

8. Choose a vendor, verify the date and PO#, then click *OK*.

**NOTE:** If you have set up default vendors in the Summit System Administration module your vendor will be chosen automatically.

9. To print, fax, or e-mail the parts order, click on one of the *Vendor Delivery Options*, then click *OK*.

**NOTE:** To e-mail parts orders the business must have a broadband connection. To fax parts orders the business must have a dedicated fax line connected to the server.

## Receiving Parts

1. Click on the *On Order* tab

2. Check the *Estimated List* and *Actual Cost* against the vendor invoice. Make changes in Summit to match the invoice. If the list price changed, enter the new list price in the *Adjusted List* column. If the actual price changed, enter the new price in the *Actual Cost* column.

Adj. List	S#	Ach %	Vendor	Ordered	Target Cost	Due
\$0.00	0	0.00%		12/31/1969	\$0.00	12/31/1

3. "Tag" the parts to be received, and click-and-drag one of the parts to the Received tab (same procedure as ordering parts)

4. Fill in the remaining invoice information in the Receive Parts window, then click *OK*

**NOTE:** The invoice is automatically posted to the *Vendor Costs* tab under the *Job Costs* button.

## Back Ordered and Credit Returned Parts

Follow the same procedure to place parts on *Back Ordered* and *Credit Return*.

**IMPORTANT NOTE:** Clicking-and-dragging a part to the *Credit Return* tab will cause the line item containing the part to be deleted from the *Repair Order*. This is used when the part is not needed. If you want to return a part and reorder another to replace it, highlight the part and click the *Return and Reorder* button, located in the menu bar above the parts line items. This will place one part in *Credit Return* and a copy of it in *On Order*.

## Print the Parts Labels

To print the appropriate label, you MUST be in the received tab

1. Click the *Parts* tab. Then click the *Labels* icon located in the menu bar on the top-middle of the screen

Jobs	Admin	Line Items	Parts	Job Costs	Media	Schedule	Reports	Messages			
400-(All Parts) / 401-On Order / 402-Received / 403-Back Ordered / 404-Credit Return / (All Part Types) <input type="checkbox"/> Hide Deleted											
VIN#: STDZA23C55S36A716		Color: RED		Paint Code:		Style: LE 4 DR Passenger		Location:			
PO	Invoice	Return	Transfer	New	Save	Cancel	Print	Labels			
								# of Parts: 1	List: \$182.00	Cost:	
Adj. List	S#	Ach %	Vendor	Ordered	Target Cost	Due	Rec'd	Inv Date	Inv #	Credit Rec'd	Reason for Return
\$0.00	0	0.00%		12/31/1969	\$0.00	12/31/1969	12/31/1969	12/31/1969			
\$0.00	0	0.00%			\$0.00						

2. Once you have selected the *Labels* icon you need to select the desired *PO* and click *Save*. A labels preview will appear and you can print either standard size or small size.

PO	Vendor	Date
19282-1	KEYSTONE	12/31/1969
19282-10	LKQ VIKING	12/30/1899
19282-2	INVERTOY	12/31/1969
19282-3	KEYSTONE	12/31/1969
19282-4	RADIATOR	11/23/2015
19282-5	RPWHEAD	12/31/1969
19282-6	KEYSTONE	11/18/2015
19282-7	RADIATOR	11/17/2015
19282-8	INVERTOY	12/31/1969
19282-9	ACTION	11/19/2015

Save Cancel

3. Once you have selected the *Label ICON* the following print box appears. Click *OK* and Summit will print the same # of labels as you have on the order.

**NOTE:** Summit recommends SEIKO printers for parts labels

Standard: Seiko Smart Label Printer (Avery #4153) Small: Dymo Label Printer (# 30252)

# Print the Parts Status and

## Parts List Reports

1. Click the *All Parts* tab.

Jobs Admin **Line Items** **Parts** Job Costs Media Schedule Reports Messages

400-(All Parts) / 401-On Order / 402-Received / 403-Back Ordered / 404-Credit Return / (All Part Types)  Hide Deleted

VIN#: STDZA23C555364716 Color: RED Paint Code: Style: LE 4 DR Passenger Location:

PO Invoice Return Transfer New Save Cancel **Print** Labels # of Parts: 1 List: \$182.00 Cost:

Adj. List	S#	Ach %	Vendor	Ordered	Target Cost	Due	Rec'd	Inv Date	Inv #	Credit Rec'd	Reason for Return
\$0.00	0	0.00%			\$0.00	12/31/1969	12/31/1969	12/31/1969		<input type="checkbox"/>	
\$0.00	0	0.00%		12/31/1969	\$0.00	12/31/1969	12/31/1969	12/31/1969		<input type="checkbox"/>	

2. Then click the *Print* icon located in the menu bar on the left side of the screen

3. In the menu that appears, place a check mark in the box next to *Parts Status* or *Parts List* and click the *Print* button.

Report

Run Reports Photo Manager Digital Authorization Status Fax Email PDF Print

Parts List  
 Parts Status Report  
 Photo Report  
 Image Thumbnails

Fridley Auto Body  
 960 Osborne Rd NE  
 Fridley, MN 55432  
 PH:763-784-4211 Fax:763-784-4233

**RO #:19282**  
**Unit #:**  
 Estimator: Rizzo, Jill

### Parts Status Report

Customer Information		Vehicle Information		Insurance Information	
Name:	YOUNGJOHN/ANGELA	Vehicle:	2005 RED Toyota Sienna	Ins Co:	State Farm Ins.
Address:	2702 21ST ST NW	State:	IA	Company:	
Phone:	952-288-9438	License:	233 PCA	Phone:	651-285-9260
		VIN:	5TC2A2C38364716	#:	25783013002
		Message:	115205	Default:	\$50000

#	Description	Part #	Vendor	Invoice #	Inv Date	Status	Ordered	ETA	RD \$	List	Cost	GP %
28	Paint Primer Sump	82184 8010			12/31/1969	D			\$101.91	\$101.91	\$0.00	
1	Conv. Paint Sump	82184 8010			12/31/1969	D	12/31/1969	12/31/1969	\$345.32	\$345.32	\$0.00	
18	Hinge, Hood Panel	LT	SAVIAZE PART		12/31/1969	D	12/31/1969	12/31/1969	\$52.50	\$52.50	\$0.00	
12	Panel, Hood	LT	SAVIAZE PART		12/31/1969	D	12/31/1969	12/31/1969	\$255.00	\$255.00	\$0.00	
12	Hoodline Hse. H/Adapter	RT	PMI RECYCLED QIAD		12/31/1969	D	12/31/1969	12/31/1969	\$135.87	\$135.87	\$0.00	
24	Radiator		BOGHOFF PART			D			\$284.00	\$284.00	\$0.00	
18	Hinge, Hood Panel	RT	SAVIAZE PART		12/31/1969	D	12/31/1969	12/31/1969	\$52.50	\$52.50	\$0.00	
9	Hoodline Hse. H/Adapter	LT	PMI RECYCLED QIAD		12/31/1969	D	12/31/1969	12/31/1969	\$135.87	\$135.87	\$0.00	
42	Condenser A/C		BOGHOFF PART	KESTON	11/07/2018	R	12/31/1969	12/31/1969	\$189.00	\$189.00	\$89.27	45.39%
99	Radiator		SAVIAZE PART	LIQ	70391123	S			\$182.00	\$0.00	\$182.00	23.09%
28	Break, Battery Hse	LT	ZIVERTDY	127821	11/17/2018	R	12/31/1969	12/31/1969	\$19.18	\$19.18	\$14.37	28%
8	Motor, Fuel Sump		ZIVERTDY	127821	11/18/2018	R	12/31/1969	12/31/1969	\$88.88	\$88.88	\$71.87	28%
4	Motor, Fuel Sump	LT	ZIVERTDY	127821	11/17/2018	R	12/31/1969	12/31/1969	\$24.85	\$24.85	\$20.14	24.99%
22	Control Arm Panel Lwr		ZIVERTDY	127821	11/17/2018	R	12/31/1969	12/31/1969	\$88.37	\$88.37	\$73.78	28%
48	Shut, Inner Panel	LT	ZIVERTDY	127821	11/18/2018	R	12/31/1969	12/31/1969	\$107.82	\$107.82	\$85.84	28%
17	Latch, Hood Panel		ZIVERTDY	127821	11/17/2018	R	12/31/1969	12/31/1969	\$85.18	\$85.18	\$58.13	28.19%
18	Shield, Hood Latch		ZIVERTDY	127821	11/17/2018	R	12/31/1969	12/31/1969	\$14.80	\$14.80	\$10.94	28%
9	Motor, Fuel Sump	RT	ZIVERTDY	127821	11/17/2018	R	12/31/1969	12/31/1969	\$24.85	\$24.85	\$20.14	24.99%
20	Control Arm Panel Lwr	RT	ZIVERTDY	127821	11/17/2018	R	12/31/1969	12/31/1969	\$88.71	\$88.71	\$65.35	28%
22	Control Arm Panel Lwr	LT	ZIVERTDY	127821	11/18/2018	R	12/31/1969	12/31/1969	\$88.71	\$88.71	\$65.35	28%
8	Orbital, Gr-R		ZIVERTDY	127821	11/17/2018	R	12/31/1969	12/31/1969	\$28.85	\$28.85	\$21.54	24.99%

Page #1

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# Production Management

## Assign Technicians to Jobs

1. Click the *Open RO's* tab and choose the *RO List* view.
2. "Right Click" on the specific RO you want to allocate, Select *Assign Labor* and the "Assign Labor Box" appears. (You will notice there are different colors. **GREEN** = Already assigned, **BLUE** = Needs to be assigned, **RED** = No hours available to be assigned)

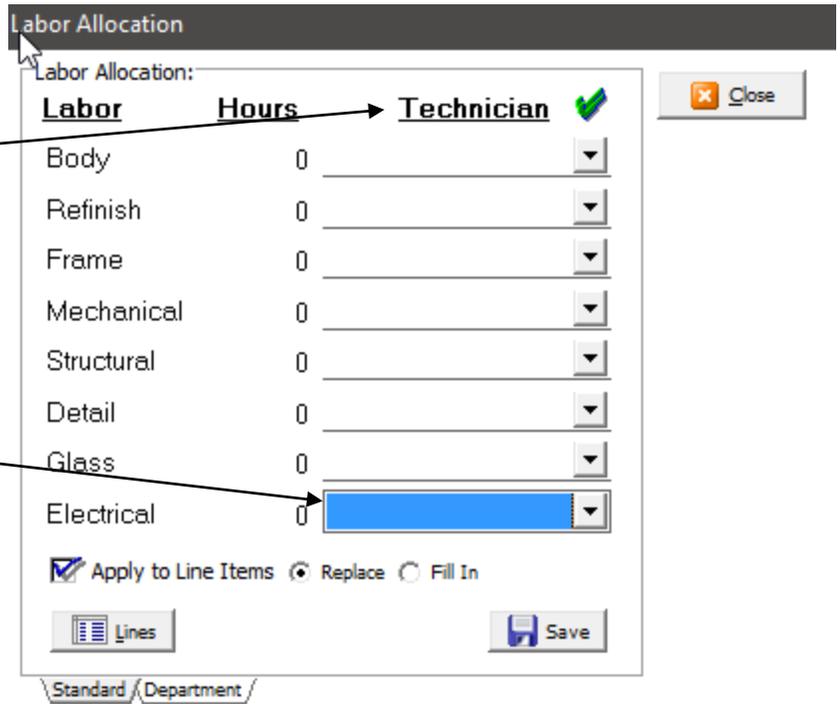
The screenshot shows a software window titled "System Module" with a toolbar and a header section containing job details. Below the header is a navigation bar with tabs like "Jobs", "Admin", "Line Items", etc. The main area is a grid of ROs with columns for R.O. #, Sch In, Sch Out, TT, CDR, Dept/Status, Job Class, Total, Ins, Estimator, and Customer. A context menu is open over row 19260, with "Assign Labor" highlighted. The grid shows various ROs with different status colors (green, blue, red) and a total of 27 rows.

R.O. #	Sch In	Sch Out	TT	CDR	Dept/Status	Job Class	Total	Ins	Estimator	Customer
19219	10/12/2015	10/16/2015	0.15	-218	Delivered	Medium SheetMetal	\$4,693.25	Selective Service	Yolanda Newman	ECONOMC
19224	10/13/2015	11/3/2015	0.20	-216	Del/Waiting Credits	Heavy Hit	\$7,665.33	American Family Ins.	Jill Rizzo	BUNKER N:
19239	10/26/2015	11/13/2015	0.00		Reassembly/Detail	Heavy Hit	\$8,783.14	Self Pay	Jill Rizzo	Erickson W
19251	10/29/2015	10/29/2015	0.00		Delivered	Same Day Repair	\$0.00	Shop Supplies	Yolanda Newman	2015 NOV
19252	11/1/2015	11/1/2015	0.00		Delivered	Same Day Repair	\$0.00	Monthly Cost Manager	Yolanda Newman	2015 NOV
19253	10/29/2015	10/29/2015	0.00		Delivered	Same Day Repair	\$0.00	Monthly Cost Manager	Yolanda Newman	2015 NOV
19260	11/2/2015	11/6/2015	0.00		/Auth Hold	Heavy Hit	\$381.36	Esumance	FRIDLEY AUTO BODY	PUGACHO
19265	11/3/2015	11/13/2015	0.00		Sublet/Mechanical	Medium SheetMetal	\$4,156.91	State Farm Ins.	Rizzo, Jill	NACHATIL
19268	11/9/2015	11/20/2015	0.00		/Waiting Credits	Medium SheetMetal	\$4,584.21	State Farm Ins.	Jill Rizzo	YERKS SAN
19272	11/6/2015	11/6/2015	0.00		/Auth Hold	Heavy Hit	\$276.92	State Farm Ins.	NEWMAN, YOLANDA	NEWMAN Y
19273	11/6/2015	11/6/2015	0.00		/Auth Hold	Heavy Hit	\$0.00	State Farm Ins.	Rizzo, Jill	KLUENDER
19274	11/6/2015	11/6/2015	0.00		/Auth Hold	Heavy Hit	\$469.40	State Farm Ins.	Jill Rizzo	SZAFIARS
19275	11/6/2015	11/6/2015	0.00		Sublet/Mechanical	Express Repair	\$151.60	Self Pay	Rizzo, Jill	NACHATIL
19276	11/6/2015	11/6/2015	0.00		Ins/Auth Hold	Heavy Hit	\$0.00	State Farm Ins.	Rizzo, Jill	KRIENS BE
19277	11/6/2015	11/6/2015	0.00		Body/Nick	Medium SheetMetal	\$5,698.28	State Farm Ins.	Rizzo, Jill	YOUNGGRI
19278	11/6/2015	11/6/2015	0.00		Reassembly/Detail	Medium SheetMetal	\$2,714.82	Western National Mutu	Jill Rizzo	Blake Mark
19285	11/18/2015	11/18/2015	0.00		Scheduled In	Same Day Repair	\$286.88	State Farm Ins.	Yolanda Newman	ELL THOM
19286	11/19/2015	11/25/2015	0.00		Paint	Medium SheetMetal	\$2,707.70	Selective Service	Rizzo, Jill	Voss Kevin
19287	11/18/2015	11/24/2015	0.00	-190	Reassembly/Detail	Light Sheet-Metal	\$0.01	Western National Mutu	Jill Rizzo	Blake-REN
19288	11/23/2015	12/2/2015	0.00		Damage Analysis	Light Sheet-Metal	\$2,052.30	State Farm Ins.	NEWMAN, YOLANDA	SABALLY L
19290	11/19/2015	11/25/2015	0.00		Paint	Medium SheetMetal	\$0.00	Selective Service	Jill Rizzo	Voss RENT
19291	11/23/2015	11/27/2015	0.00		Damage Analysis	Medium SheetMetal	\$1,207.31	American Family Ins.	Jill Rizzo	GARPETTI
19293	5/24/2016	5/24/2016	0.00		Damage Analysis	Same Day Repair	\$0.00	Ahens Ins	SUBLET	John Ferrar

3. Once you select the specific department you want to assign labor, the *Labor Allocation* window will appear. Choose a technician from the drop down list.

4. Put a check in the box next to *Apply to Line Items* to apply the tech to all body labor line items for that RO. Click *Save*.

5. Follow the same procedure for the other labor types. The other labor types are located to the right of the blue body labor "B".



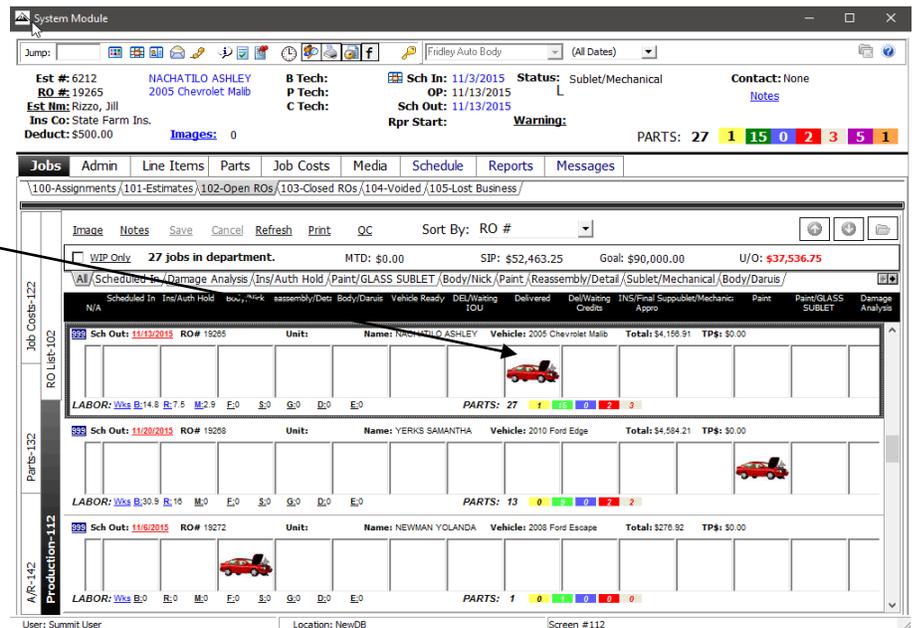
## Move the Vehicle Through Production Stages

1. Click the *Open RO's* tab and go to the *Production view*.

2. Select an RO.

3. Left click on the "car image" and drag it to the next department to move it through the production stages.

**Note:** The vehicle has to go through each individual department, it can't skip departments.



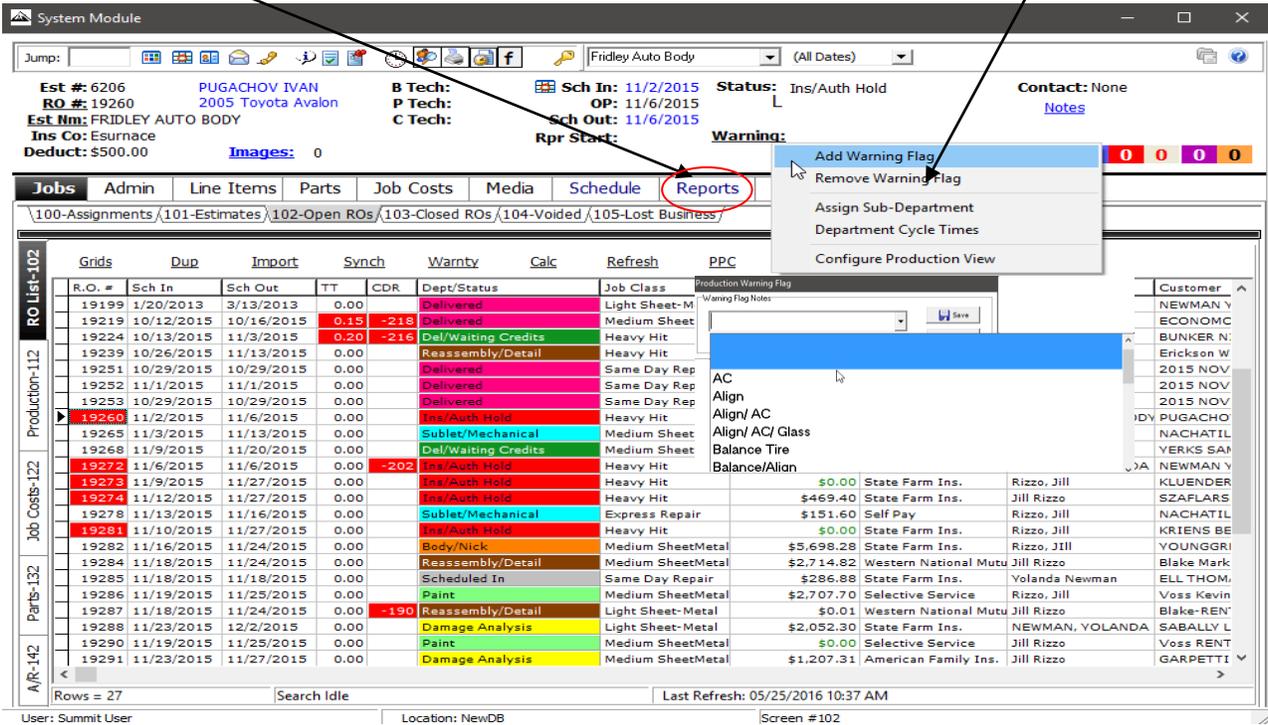
## Warning Flags

Warning Flags can be used for a variety of purposes such as identify a production delay, communicating that an RO needs specific repairs such as an alignment, glass, etc.

1. Click the *Open RO's* tab and go to the *RO List* view.

2. Choose the RO you want to create or remove the warning flag for.

3. Right click *Warning* for the selected RO. To add a warning flag, choose *Add Warning Flag*. The *Warning Flag* screen will appear. Choose one of the "preset" reasons from the drop down list and click *Save*.



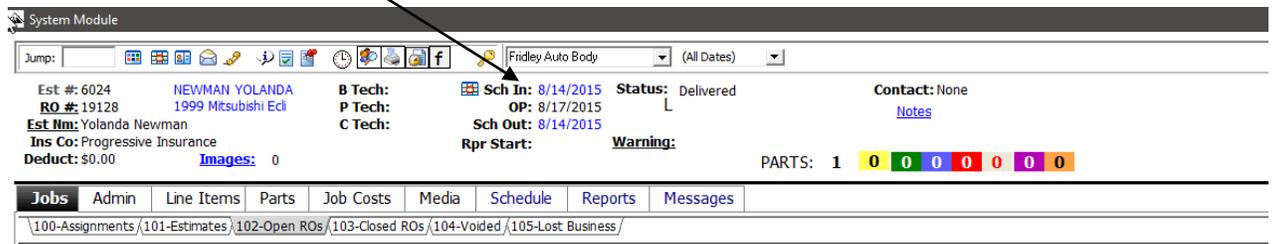
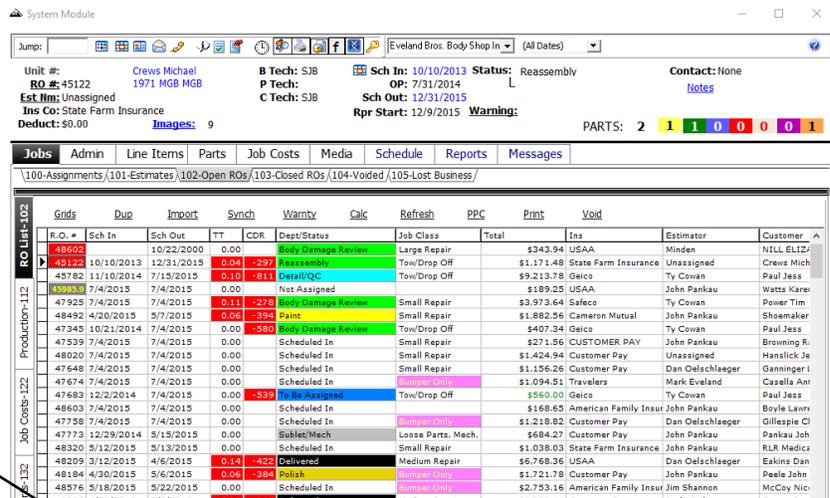
4. The *warning flag* will appear in **Red Letters** in the customer information at the top of the screen  
 5. To remove a warning flag, right click on the vehicle icon and choose *Remove Warning Flag*. The warning flag will be removed.

## Change Scheduled In Date

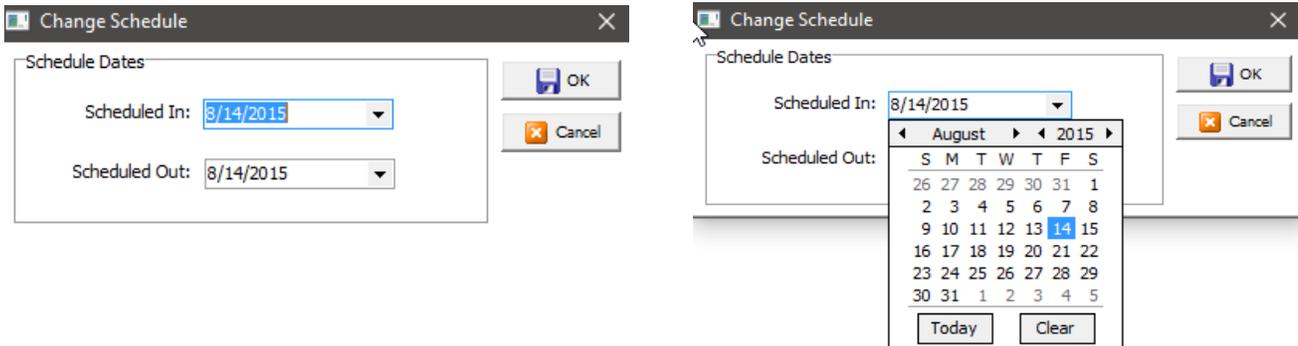
1. Click the *Open RO's* tab and go to the *RO List* view.

2. Choose the RO you want to change the *Scheduled In Date* for.

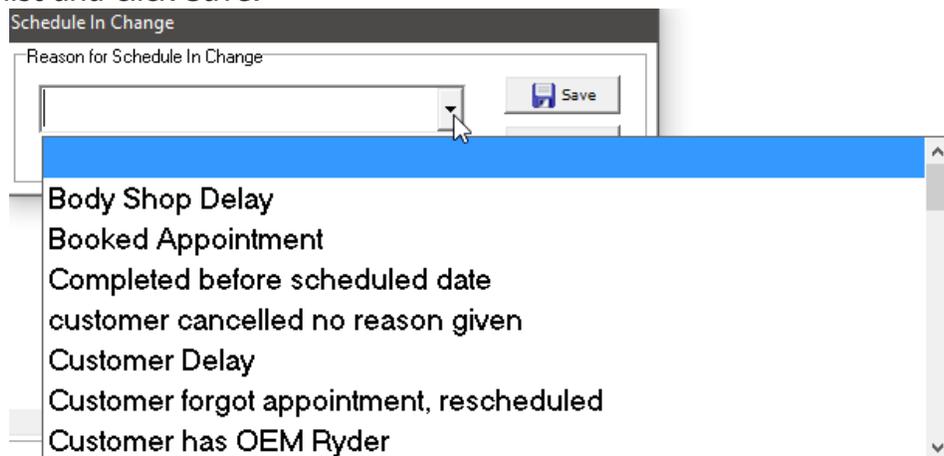
3. The *Scheduled In* and *Scheduled Out* dates are found in the customer information at the top of the screen (they are underlined and highlighted in blue)



4. Click on the *Scheduled In* date. Select the new Scheduled In date by clicking on the day in the drop down calendar that appears. Verify the hours of work per day for the RO and the new *Scheduled Out* date, and click *OK*.



5. The *Reason for Target Date Change* window will appear. Choose a reason for the change from the drop down list and click *Save*.



## Change Scheduled Out Date

Follow the same procedure as *Scheduled In* to change the *Scheduled Out* date.

# Job Costing

## Entering a Manual Vendor Cost

Summit automatically posts vendor costs as parts are received.

1. Vendor Costs can also be entered manually. Choose the RO you would like to add a vendor cost to (in the *RO List*).
2. Click the *Job Costs* button and then click the *Vendor Costs* tab.
3. Click the add a *New Cost* button in the menu bar on the left side of the screen.

Est #: 6212    NACHATILO ASHLEY  
 RO #: 19265    2005 Chevrolet Malibu  
 Est Nm: Rizzo, Jill  
 Ins Co: State Farm Ins.  
 Deduct: \$500.00    Images: 0

B Tech:    Sch In: 11/13/2015    Status: Sublet/Mechanical  
 P Tech:    OP: 11  
 C Tech:    Sch Out: 11  
 Rpr Start:

Jobs   Admin   Line Items   Parts   **Job Costs**   Media   Schedu

\500-Vendor Costs / \501-Flag Labor / \502-Timesheets / \503-Analysis /

Multi   Reverse   **New**   Edit   Delete   Save   Cancel   Totals

Date	Inv #	Vendor	List	Cost	%
11/9/2015	118159	SUBURBAN	\$13.95	\$9.07	34.98%
11/10/2015	118154	SUBURBAN	\$890.97	\$562.18	36.90%

Receive Parts Details:

C.O.D. Invoice

Vendor: Lkq Viking Auto Salvage

Cost Center: Parts: Used/LKQ

Rec'd Date: 5/25/2016     Multiple

PO#: 19282-10

Inv #:

Inv Date: 5/25/2016

Inv Amount: 0

Tax Amount: 0     Add to Invoice Total

Due Date: 5/25/2016

List Amount: \$182.00

Calc'd Cost: \$140.00

[Scan Invoice](#)

4. In the window that appears, fill in the vendor, invoice date, invoice #, amount, cost center, due date and any notes pertaining to the invoice. When all information has been entered, click *Save*.

## Entering Manual Job Costing

### Manually Flagging Flat Rate or Commission Labor Costs

1. To manually flag labor, choose the RO you would like to flag labor to (in the *RO List*).

2. Click the *Job Costs* button and the *Flag Labor* tab.

3. Click the add a *New Cost* button in the menu bar on the top of the screen

4. Enter the appropriate information in the window that appears. After all information has been entered, click the *Save Icon*.

Jobs   Admin   Line Items   Parts   **Job Costs**

\500-Vendor Costs / \501-Flag Labor / \502-Timesheets / \503-Analysis /

Multi   Reverse   **New**   Edit   Delete   Save   Cancel   Totals

Flag Labor

Cost Center: \_\_\_\_\_

Technician: \_\_\_\_\_

Date: 5/25/2016    Bld: Shop    Flanged:    Avail:    %:

Hours: \_\_\_\_\_    0.00    0.00    0.00    0.00    0.00%

Amount: \_\_\_\_\_    \$0.00    \$0.00    \$0.00    0.00%

Notes: \_\_\_\_\_

Previously Flagged:

technician	Cost_Center	Hours	Amount

5. The new labor cost will be posted in the *Flag Labor* tab.

500-Vendor Costs / 501-Flag Labor / 502-Timesheets / 503-Analysis /						
Multi	Reverse	New	Edit	Delete	Save	Cancel Totals
						<input type="checkbox"/> Include Supplies/Haz Wst in Reports
Date	Technician	Hours	Amount	Cost Center	Notes	Ent

## Manually Entering Hourly Labor Costs

Hourly Job Costing and Technician Efficiency Measurement

1. Click the *Job Costs* button and the *Timesheets* tab and then select the *New* ICON.

Est #: 6132 NACHATILO ASHLEY B Tech: Sch In: 11/13  
 RO #: 19265 2005 Chevrolet Malib P Tech: OP: 11/13  
 Est Nm: Rizzo, Jill C Tech: Sch Out: 11/20  
 Ins Co: State Farm Ins. Rpr Start:  
 Deduct: \$500.00 Images: 0

Jobs Admin Line Items Parts Job Costs Media Schedule

500-Vendor Costs / 501-Flag Labor / 502-Timesheets / 503-Analysis /

Multi Reverse New GTE Edit Delete Save Cancel Totals

Date Tech Cost Center Dept Start Time End

Tech Timesheet Entry

Timesheet Data

RO #: 19265

Technician: Detail

Cost Center: Prep Labor

Department: Ins/Auth Hold

Date: 5/18/2016

Start Time: 12:00:00 AM

End Time: 9:00:00 PM

Hours: 0.0833333333333333

Force OT: Amount: \$0.00

Notes: Flat Rate

2. Select the Technician, Cost Center, Date of Cost, and then enter in the hours applied to that Repair Order.

## Manually Entering Hourly Labor Costs for Multiple Repair Orders

Hourly Job Costing and Technician Efficiency Measurement

1. Select *Timesheets* Tab and then select *Multiple* ICON.

Est #: 6132 NACHATILO ASHLEY B Tech: Sch In: 11/13/2015 Status: Suble  
 RO #: 19265 2005 Chevrolet Malib P Tech: OP: 11/13/2015 L  
 Est Nm: Rizzo, Jill C Tech: Sch Out: 11/20/2015  
 Ins Co: State Farm Ins. Rpr Start: Warning:  
 Deduct: \$500.00 Images: 0

Jobs Admin Line Items Parts Job Costs Media Schedule Reports Mess.

500-Vendor Costs / 501-Flag Labor / 502-Timesheets / 503-Analysis /

Multi Reverse New GTE Edit Delete Save Cancel Totals  Include Supplies/Haz Wst in Reports

Date Tech Cost Center Dept Start Time End Time Hours Amount

Tech Timesheet Entry

Timesheet Data

RO #: 75656

Technician: Darius McRae-Crooks

Cost Center: Refinish Labor

Department:

Date: 5/25/2016

Start Time: 12:00:00 AM

End Time: 12:00:00 AM

Hours: 0.0

Force OT: Amount:

Notes:

2. Enter the RO #, Select Technician, Date, and then enter in the # of hours accrued on that RO and then Select NEXT. This will allow you to enter in the costs of multiple RO's from a single entry point!

# Costing Paint Materials, Hazardous Waste, and Shop Supplies

1. Choose the RO you would like to add the costs to. (in the *RO List* view)

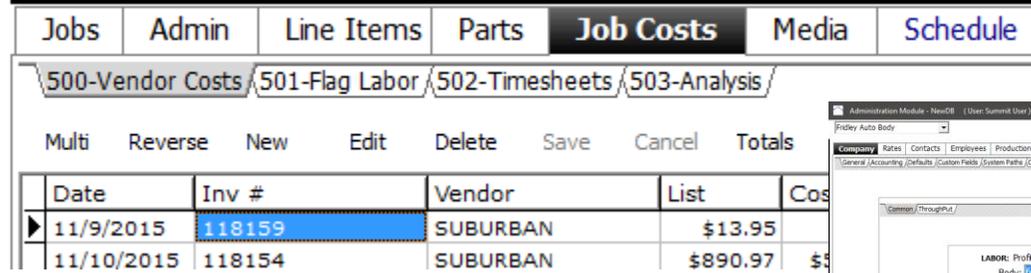
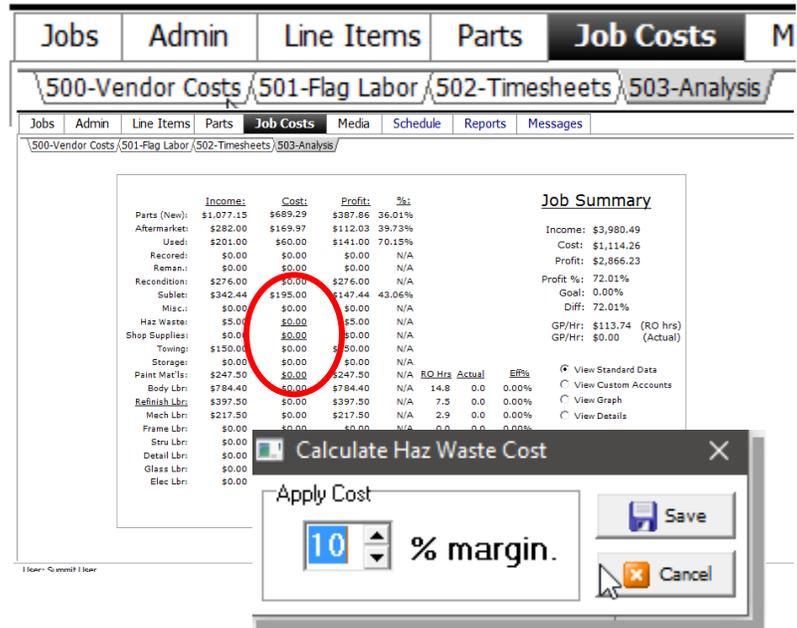
2. Click on the *Job Costs* button and choose the *Analysis* tab.

3. The numbers in the *Cost* column for *Paint Materials*, *Hazardous Waste* and *Shop Supplies* will be highlighted in blue.

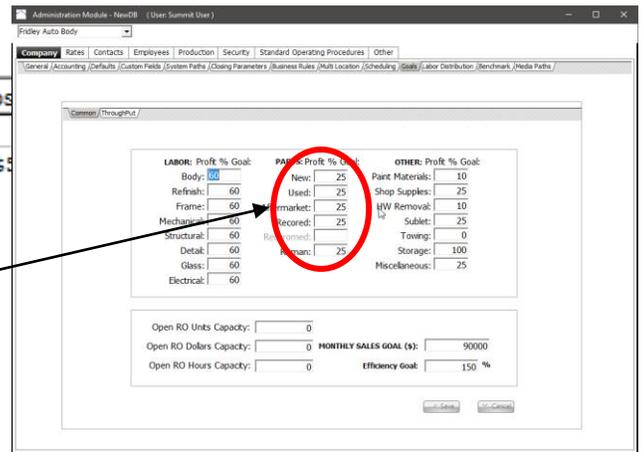
4. To post a cost for any of these categories, click the blue highlighted number in the *Cost* column.

5. The *Calculate Cost* window will appear. Choose a percent margin and click *Save*.

6. The cost will be posted in the *Vendor Costs* tab



7. If you want this costs to occur automatically you must set up your *Goals* in the *System Administration Module* and those goals will apply costs based on your shop's individual goals.

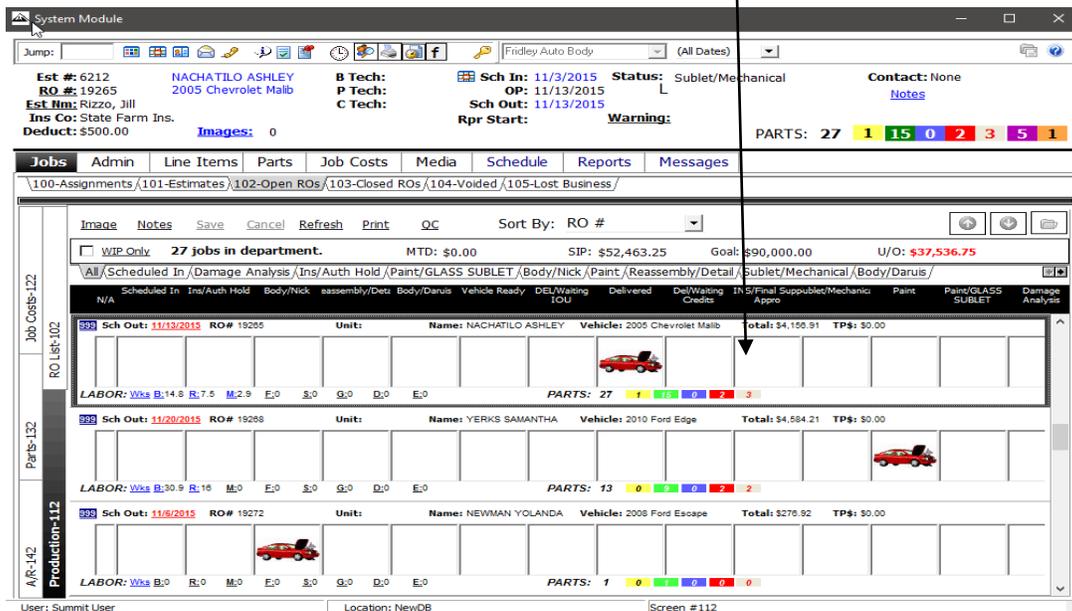


# Vehicle Delivery

## Vehicle Delivery Process

1. ALL RO's must be "pre-closed" prior to giving the paperwork to the CSR.

2. Once the paperwork has been delivered to the CSR, the CSR should contact the customer and schedule a delivery date and time. The CSR should then "drag" the image of the vehicle to the "Ready" department.



## Customer Pay

For all RO's that are Customer Pay the following processes should be followed:

1. CSR to collect funds from customer and provide them with the following documents:

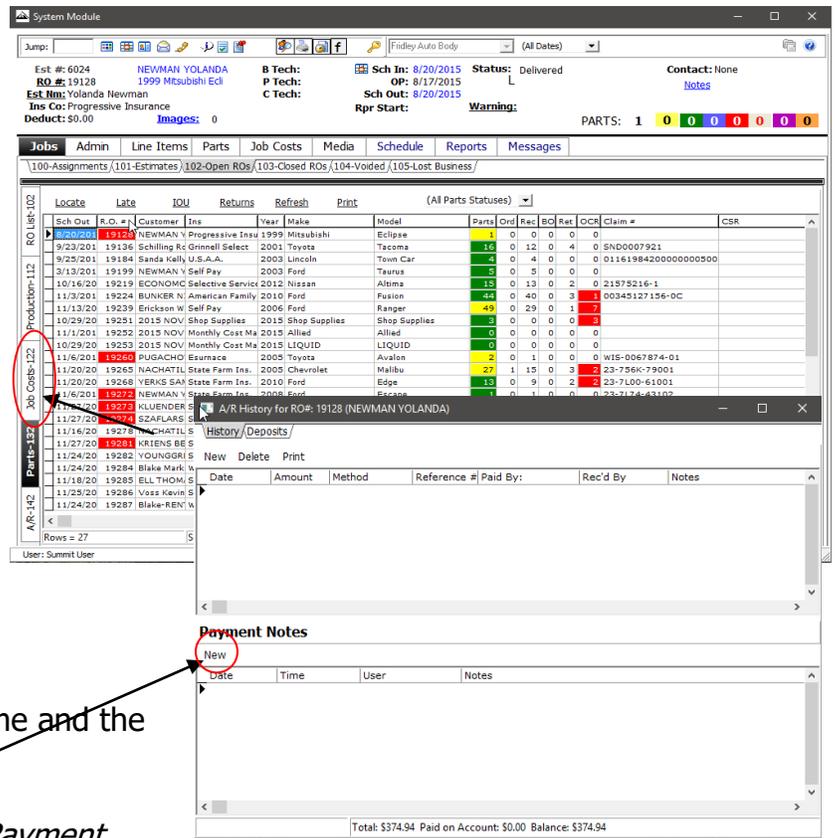
- CCC Estimate
- Summit Invoice with Rates
- Summit Collision Centers and Insurance Warranty documents.

2. CSR to enter in payments into Summit software. "Click on" Accounts Receivable View.

3. Locate the customer name.

4. "Double Click" on the customer name and the following screen appears.

5. "Click on" the NEW ICON and the Payment Screen will appear.



6. Enter in the appropriate payment information and “click on” the *SAVE ICON*.

7. Once you have saved your entries “click on” the *PRINT ICON* and the Print dialog box will appear. Select *Customer Receipt* and *Print*. Print 2 copies.

The 'Report' dialog box shows the following options:

- A/R Payment History
- Customer Receipt

The 'Customer Receipt' preview includes:

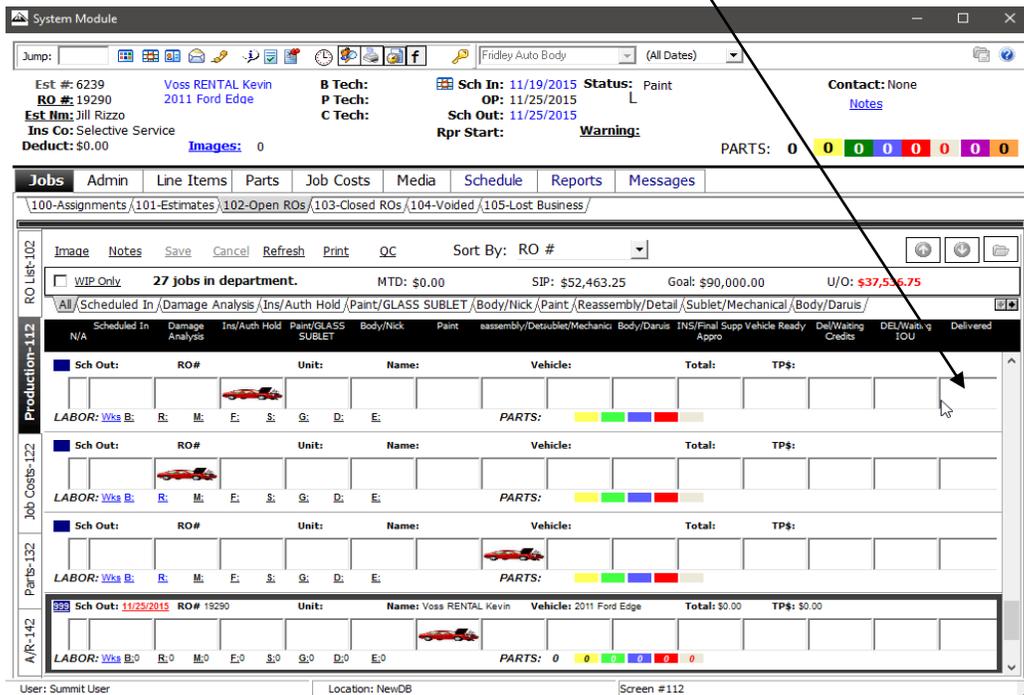
- Friday Auto Body, 4800 Deanna Dr SE, P.O. Box 19152422, Ph: 754-764-4111, Fax: 754-764-4222, 334096
- Customer Information: Name: John Ferrari, Address: 8411, State: FL, Zip: 32825, Phone: 202825
- Vehicle Information: Vehicle: 2007 Red Ford Focus, VIN: 1FADP34945D, Make: FORD, Model: Focus
- Insurance Information: Company: State Farm, Policy: 10214-4222, Deductible: \$500
- Table:
 

Date	Reference	Received From	Received By	Amount
05/26/2016		John Ferrari	Summit Lee	
- Signature lines for Date, Signature, RO Total, Paid, and Balance Due.

## Vehicle Delivery Process (DRP)

1. ALL RO's must be “pre-closed” prior to giving the paperwork to the CSR.

2. Once the paperwork has been delivered to the CSR, the CSR should contact the customer and schedule a delivery date and time. The CSR should then “drag” the image of the vehicle to the “Delivered” department.



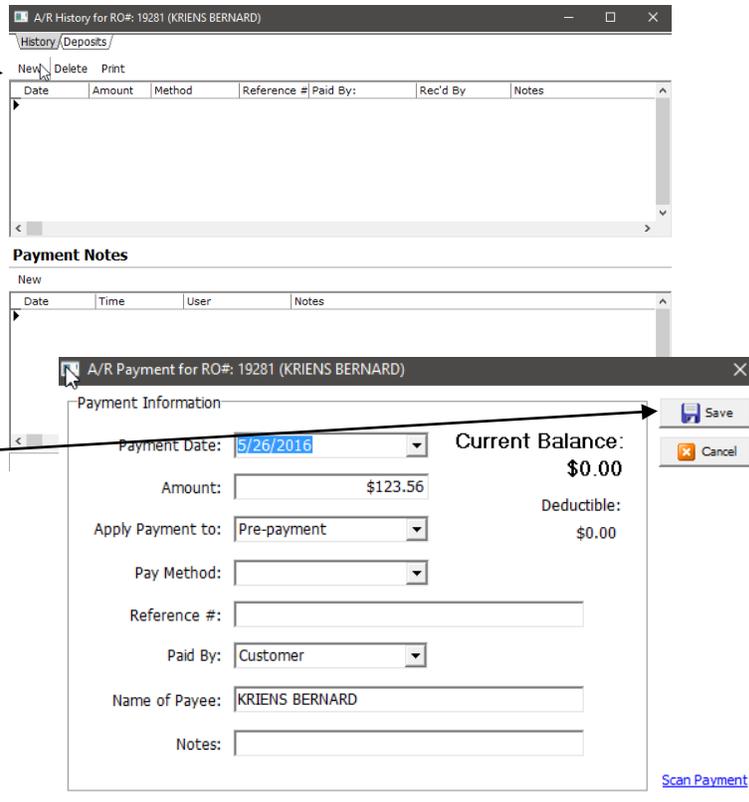
## DRP

For all RO's that are *Direct Repair* the following processes should be followed:

1. CSR to collect funds from customer and provide them with the following documents:
  - CCC Estimate
  - Summit Invoice W/ Rates
  - Summit Collision Centers and Insurance Warranty documents.
2. CSR to enter in payments into Summit software.
3. “Click on” *Accounts Receivable* Tab
4. Locate the customer name

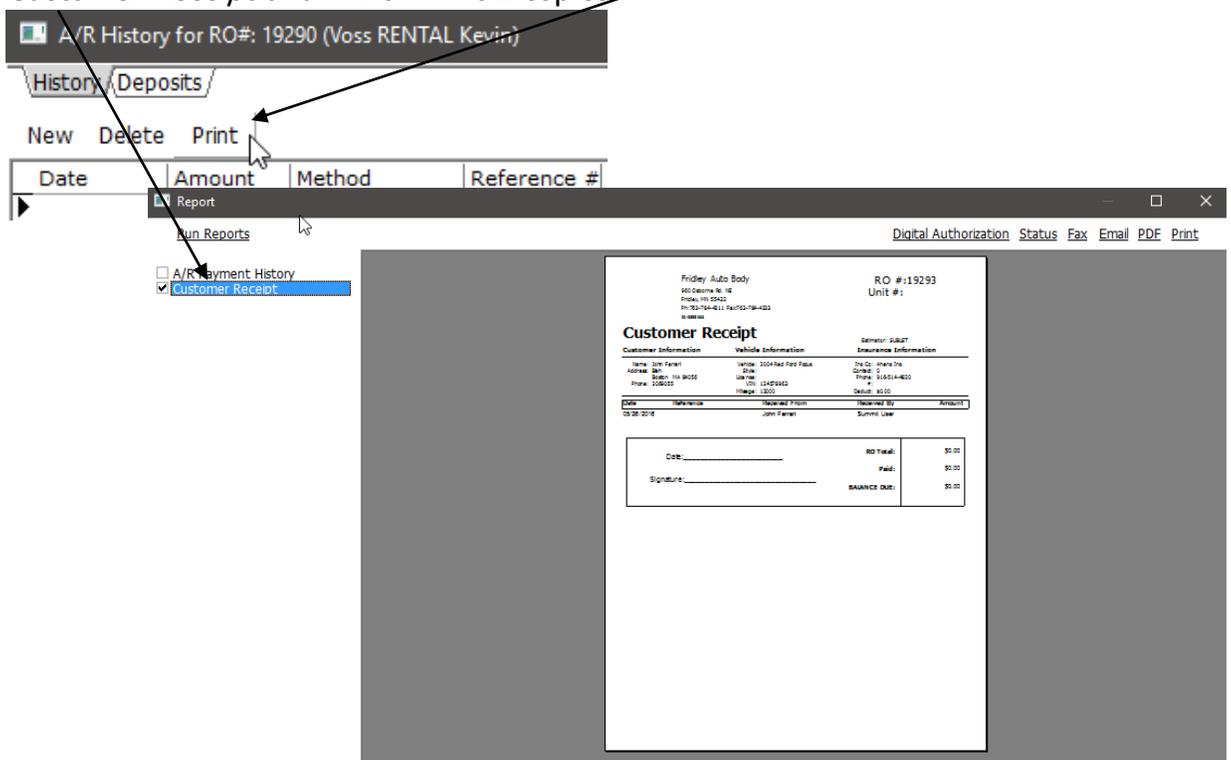
5. "Double Click" on the customer name and the following screen appears.

6. "Click on" the *NEW ICON* and the *Payment Screen* will appear.



7. Enter in the appropriate payment information and "click on" the *SAVE ICON*.

8. Once you have saved your entries "click on" the *PRINT ICON* and the Print dialog box will appear. Select *Customer Receipt and Print*. Print 2 copies.



# Pre-Close Process

1. Open Summit Software and Access Repair Order in RO View.
2. Locate RO file.

System Module

Jump: [Icons] Eveland Bros. Body Shop In (All Dates)

Unit #: Crews Michael  
 RO #: 45122  
 Est Nm: Unassigned  
 Ins Co: State Farm Insurance  
 Deduct: \$0.00  
 Images: 9

B Tech: SJB  
 P Tech:  
 C Tech: SJB

Sch In: 10/10/2013  
 OP: 7/31/2014  
 Sch Out: 12/31/2015  
 Rpr Start: 12/9/2015  
 Status: Reassembly  
 Warning:

Contact: None  
[Notes](#)

PARTS: 2 1 1 0 0 0 0 1

Jobs Admin Line Items Parts Job Costs Media Schedule Reports Messages

100-Assignments / 101-Estimates / 102-Open ROs / 103-Closed ROs / 104-Voided / 105-Lost Business

Grids	Dup	Import	synch	Warranty	Calc	Refresh	PPC	Print	Void	
R.O. #	Sch In	Sch Out	TT	CDR	Dept/Status	Job Class	Total	Ins	Estimator	Customer
48602	10/10/2013	10/22/2000	0.00		Body Damage Review	Large Repair	\$343.94	USAA	Minden	NILL ELIZ
45122	10/10/2013	12/31/2015	0.04	-297	Reassembly	Tow/Drop Off	\$1,171.48	State Farm Insurance	Unassigned	Crews Mich
45782	11/10/2014	7/15/2015	0.10	-811	Detail/QC	Tow/Drop Off	\$9,213.78	Geico	Ty Cowan	Paul Jess
43009	7/4/2015	7/4/2015	0.00		Not Assigned		\$189.25	USAA	John Pankau	Watts Karei
47925	7/4/2015	7/4/2015	0.11	-278	Body Damage Review	Small Repair	\$3,973.64	Safeco	Ty Cowan	Power Tim
48492	4/20/2015	5/7/2015	0.06	-394	Paint	Small Repair	\$1,882.56	Cameron Mutual	John Pankau	Shoemaker
47345	10/21/2014	7/4/2015	0.00	-580	Body Damage Review	Tow/Drop Off	\$407.34	Geico	Ty Cowan	Paul Jess
47539	7/4/2015	7/4/2015	0.00		Scheduled In	Small Repair	\$271.56	CUSTOMER PAY	John Pankau	Browning R.
48020	7/4/2015	7/4/2015	0.00		Scheduled In	Small Repair	\$1,424.94	Customer Pay	Unassigned	Hanslick Je
47648	7/4/2015	7/4/2015	0.00		Scheduled In	Small Repair	\$1,156.26	Customer Pay	Dan Oelschlaeger	Ganninger I
47674	7/4/2015	7/4/2015	0.00		Scheduled In	Bumper Only	\$1,094.51	Travelers	Mark Eveland	Casella Ant
47683	12/2/2014	7/4/2015	0.00	-539	To Be Assigned	Tow/Drop Off	\$560.00	Geico	Ty Cowan	Paul Jess
48603	7/4/2015	7/4/2015	0.00		Scheduled In		\$168.65	American Family Insur	John Pankau	Boyle Lawre
47758	7/4/2015	7/4/2015	0.00		Scheduled In	Bumper Only	\$1,218.82	Customer Pay	Dan Oelschlaeger	Gillespie Cl
47773	12/29/2014	5/15/2015	0.00		Sublet/Mech	Loose Parts, Mech,	\$684.27	Customer Pay	John Pankau	Pankau Joh
48320	5/12/2015	5/13/2015	0.00		Scheduled In	Small Repair	\$1,038.03	State Farm Insurance	John Pankau	RLR Medica
48209	3/12/2015	4/6/2015	0.14	-422	Delivered	Medium Repair	\$6,768.36	USAA	Dan Oelschlaeger	Eakins Dan
48184	4/30/2015	5/6/2015	0.06	-384	Polish	Bumper Only	\$1,721.78	Customer Pay	John Pankau	Peele John
48576	5/18/2015	5/22/2015	0.00		Scheduled In	Bumper Only	\$2,753.16	American Family Insur	Jim Shannon	McCoy Nic
48356	4/27/2015	5/6/2015	0.08	-385	Delivered	Medium Repair	\$2,733.44	Customer Pay	Jack Kimlin	Essary Ron
48357	5/6/2015	5/18/2015	0.00		Scheduled In	Medium Repair	\$2,651.13	Customer Pay	Jack Kimlin	Essary Ron
48252	5/20/2015	6/1/2015	0.00		Scheduled In	Medium Repair	\$4,226.43	Farmers Insurance	Dan Oelschlaeger	Stewart Col
48259	4/15/2015	6/1/2015	0.19	-414	Reassembly	Tow/Drop Off	\$16,023.93	Chubb Insurance	Dan Oelschlaeger	Van Dyk Ta

Rows = 178 Search Idle Refresh

User: Summit Test Employee Location: Server Screen #102

3. "Click on" Job Cost Tab. The following screen will appear.

System Module

Jump: [Icons] Fridley Auto Body (All Dates)

Est #: 6154  
 RO #: 19219  
 Est Nm: Yolanda Newman  
 Ins Co: Selective Service  
 Deduct: \$500.00  
 Images: 0

ECONOMON LOIS  
 2012 Nissan Altima

B Tech:  
 P Tech:  
 C Tech:

Sch In: 10/12/2015  
 OP: 10/12/2015  
 Sch Out: 10/16/2015  
 Rpr Start: 10/13/2015  
 Status: Delivered  
 Warning:

Contact: None  
[Notes](#)

PARTS: 15 0 13 0 0 2 1 0

Jobs Admin Line Items Parts Job Costs Media Schedule Reports Messages

500-Vendor Costs / 501-Flag Labor / 502-Timesheets / 503-Analysis

Multi Reverse New Edit Delete Save Cancel Totals  Include Supplies/Haz Wstn Reports

Date	Inv #	Vendor	List	Cost	%	Cost Center	Due Date	COD	Notes
10/13/2015	20648-	TIREDEPOT	\$167.18	\$115.00	31.21%	Parts: Aftermarket	10/13/201	M	ck10060
10/15/2015	805999	PAMS	\$325.00	\$250.00	23.08%	Parts - LKQ	11/10/201	F	Parts Posted Invoice
10/15/2015	301272	MORRIE	\$981.89	\$679.74	30.77%	Parts: New	11/10/201	F	Parts Posted Invoice
10/15/2015	301244	MORRIE	\$140.90	\$105.67	25.00%	Parts: New	11/10/201	F	Parts Posted Invoice

4. Open physical RO File and insure all invoices that are listed on screen are in the file. If the Estimators/File Handlers locate invoices in the file that are not on the screen the Estimators/File Handlers should look at the top of the screen to review the *Parts Status*. In most cases the Estimators/File Handlers will notice parts still on order. If parts are still on order they should be received at this time.

System Module

Jump: [Icons] Fridley Auto Body (All Dates)

Est #: 6154 ECONOMON LOIS B Tech: Sch In: 10/12/2015 Status: Delivered Contact: None  
 RO #: 19219 2012 Nissan Altima P Tech: OP: 10/12/2015 Notes  
 Est Nm: Yolanda Newman C Tech: Sch Out: 10/16/2015  
 Ins Co: Selective Service Rpr Start: 10/13/2015 Warning:  
 Deduct: \$500.00 Images: 0 PARTS: 15 0 13 0 0 2 1 0

Jobs Admin Line Items Parts **Job Costs** Media Schedule Reports Messages

500-Vendor Costs / 501-Flag Labor / 502-Timesheets / 503-Analysis /

Multi Reverse New Edit Delete Save Cancel Totals  Include Supplies/Haz Wst in Reports

Date	Inv #	Vendor	List	Cost	%	Cost Center	Due Date	COD	Notes
10/13/2015	20648-	TIREDEPOT	\$167.18	\$115.00	31.21%	Parts: Aftermarket	10/13/201	<input checked="" type="checkbox"/>	ck10060
10/15/2015	805999	DAMS	\$295.00	\$250.00	84.75%	Parts - LKQ	11/10/201	<input type="checkbox"/>	Parts Entered Invoice

5. If an invoice needs to be entered in from the Job Cost screen, simply click on the *NEW ICON* and the following screen will appear.

Receive Parts

Receive Parts Details:

**C.O.D. Invoice**

Vendor: Lkq Viking Auto Salvage

Cost Center: Parts: Used/LKQ

Rec'd Date: 5/25/2016  Multiple

PO#: 19282-10

Inv #: \_\_\_\_\_

Inv Date: 5/25/2016

Inv Amount: 0

Tax Amount: 0  Add to Invoice Total

Due Date: 5/25/2016

List Amount: \$182.00

Calc'd Cost: \$140.00

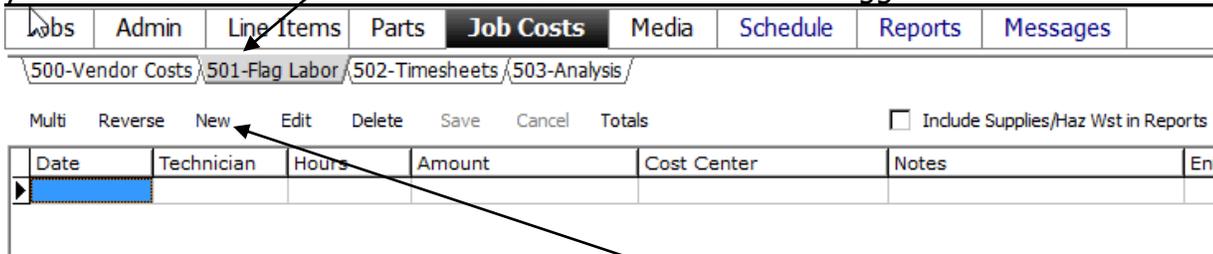
OK

Cancel

[Scan Invoice](#)

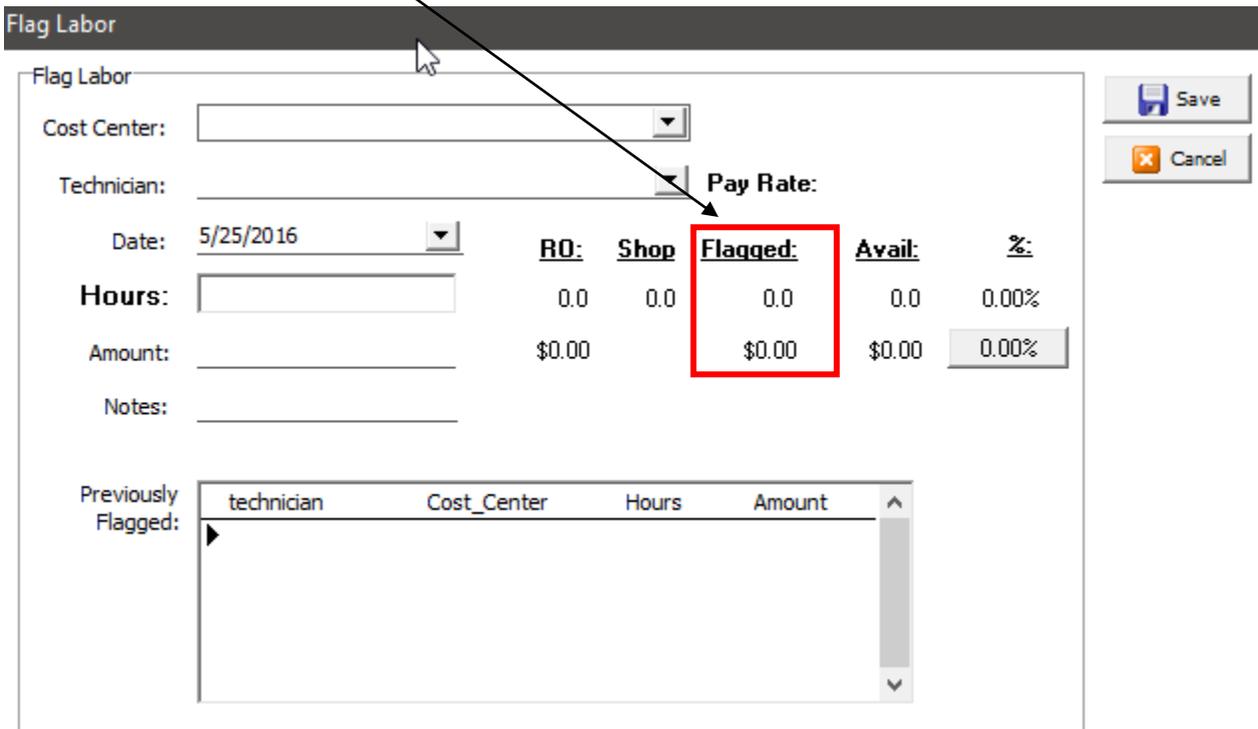
6. Enter in the appropriate invoice information.

7. "Click" on the *FLAG LABOR* Tab. Please verify all labor has been flagged. To validate all labor is flagged, look at the *Cost Centers* to see if hours have been "flagged" against the repair order. If you do not see "buff detail" all the hours HAVE NOT been flagged.



8. If the hours have not been flagged "click on" the *NEW ICON* and the flag labor screen will appear. Click on "Cost Center" drop down arrow and select *Labor: Body* and the system will display the # of hours that need to be flagged.

9. "Click on" the *Technician* drop down arrow and select the appropriate technician that should be flagged, enter in the *remaining hours*, and "click on" the *Save Icon*.



10. Select the *Analysis Tab*. Once the tab is selected the following screen will appear. The key here is to make sure that for EVERY *Income* there is an associated *Cost*. Also check for appropriate GP% in the Parts areas.

Jobs	Admin	Line Items	Parts	<b>Job Costs</b>	Media	Schedule	Reports	Messages																																																																																																														
\500-Vendor Costs\501-Flag Labor\502-Timesheets\503-Analysis/																																																																																																																						
<table border="1"> <thead> <tr> <th></th> <th><u>Income:</u></th> <th><u>Cost:</u></th> <th><u>Profit:</u></th> <th><u>%:</u></th> </tr> </thead> <tbody> <tr><td>Parts (New):</td><td>\$1,077.15</td><td>\$689.29</td><td>\$387.86</td><td>36.01%</td></tr> <tr><td>Aftermarket:</td><td>\$282.00</td><td>\$169.97</td><td>\$112.03</td><td>39.73%</td></tr> <tr><td>Used:</td><td>\$201.00</td><td>\$60.00</td><td>\$141.00</td><td>70.15%</td></tr> <tr><td>  Recorded:</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>N/A</td></tr> <tr><td>  Reman.:</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>N/A</td></tr> <tr><td>Recondition:</td><td>\$276.00</td><td>\$0.00</td><td>\$276.00</td><td>N/A</td></tr> <tr><td>  Sublet:</td><td>\$342.44</td><td>\$195.00</td><td>\$147.44</td><td>43.06%</td></tr> <tr><td>  Misc.:</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>N/A</td></tr> <tr><td>  Haz Waste:</td><td>\$5.00</td><td><u>\$0.00</u></td><td>\$5.00</td><td>N/A</td></tr> <tr><td>Shop Supplies:</td><td>\$0.00</td><td><u>\$0.00</u></td><td>\$0.00</td><td>N/A</td></tr> <tr><td>  Towing:</td><td>\$150.00</td><td>\$0.00</td><td>\$150.00</td><td>N/A</td></tr> <tr><td>  Storage:</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>N/A</td></tr> <tr><td>Paint Mat'ls:</td><td>\$247.50</td><td><u>\$0.00</u></td><td>\$247.50</td><td>N/A</td></tr> <tr><td>  Body Lbr:</td><td>\$784.40</td><td>\$0.00</td><td>\$784.40</td><td>N/A</td></tr> <tr><td>  Refinish Lbr:</td><td>\$397.50</td><td>\$0.00</td><td>\$397.50</td><td>N/A</td></tr> <tr><td>  Mech Lbr:</td><td>\$217.50</td><td>\$0.00</td><td>\$217.50</td><td>N/A</td></tr> <tr><td>  Frame Lbr:</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>N/A</td></tr> <tr><td>  Stru Lbr:</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>N/A</td></tr> <tr><td>  Detail Lbr:</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>N/A</td></tr> <tr><td>  Glass Lbr:</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>N/A</td></tr> <tr><td>  Elec Lbr:</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>N/A</td></tr> </tbody> </table>									<u>Income:</u>	<u>Cost:</u>	<u>Profit:</u>	<u>%:</u>	Parts (New):	\$1,077.15	\$689.29	\$387.86	36.01%	Aftermarket:	\$282.00	\$169.97	\$112.03	39.73%	Used:	\$201.00	\$60.00	\$141.00	70.15%	Recorded:	\$0.00	\$0.00	\$0.00	N/A	Reman.:	\$0.00	\$0.00	\$0.00	N/A	Recondition:	\$276.00	\$0.00	\$276.00	N/A	Sublet:	\$342.44	\$195.00	\$147.44	43.06%	Misc.:	\$0.00	\$0.00	\$0.00	N/A	Haz Waste:	\$5.00	<u>\$0.00</u>	\$5.00	N/A	Shop Supplies:	\$0.00	<u>\$0.00</u>	\$0.00	N/A	Towing:	\$150.00	\$0.00	\$150.00	N/A	Storage:	\$0.00	\$0.00	\$0.00	N/A	Paint Mat'ls:	\$247.50	<u>\$0.00</u>	\$247.50	N/A	Body Lbr:	\$784.40	\$0.00	\$784.40	N/A	Refinish Lbr:	\$397.50	\$0.00	\$397.50	N/A	Mech Lbr:	\$217.50	\$0.00	\$217.50	N/A	Frame Lbr:	\$0.00	\$0.00	\$0.00	N/A	Stru Lbr:	\$0.00	\$0.00	\$0.00	N/A	Detail Lbr:	\$0.00	\$0.00	\$0.00	N/A	Glass Lbr:	\$0.00	\$0.00	\$0.00	N/A	Elec Lbr:	\$0.00	\$0.00	\$0.00	N/A	<h3>Job Summary</h3> <p>Income: \$3,980.49            Cost: \$1,114.26            Profit: \$2,866.23            Profit %: 72.01%            Goal: 0.00%            Diff: 72.01%            GP/Hr: \$113.74 (RO hrs)            GP/Hr: \$0.00 (Actual)</p> <p> <input checked="" type="radio"/> View Standard Data  <input type="radio"/> View Custom Accounts  <input type="radio"/> View Graph  <input type="radio"/> View Details         </p> <p> <input checked="" type="checkbox"/> <input type="checkbox"/> Print         </p>
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I User: Summit I User      Location: NewPR      Screen #503

11. "Click on" the **GREEN** Check Mark. This will launch the following "pre-close" checklist.

ALL items must have a **GREEN** Checkmark next to it BEFORE the file is ready for delivery!

If an item has a **RED X** in front of it something has not been completed. To see what needs to be completed "click on" the *associated tab* at the bottom of this screen.

**Job Closing**

Summary

- Profit:** 71.13% (Outside range)
- Parts:** All parts have been received.
- Credits:** There are no outstanding credit returns pending.
- Parts Costs:** All parts have been costed.
- Dates:** Some required dates are missing.
- Cost Centers:** All cost centers validated or not required.
- Price Match:** Not required.
- Labor Flags:** Some labor has not been flagged.
- Compliance:** All tasks have been completed.

**A/R:** A/R balance is currently \$2,045.42

12. Once the "pre-close" process is complete you should select *PRINT* and print a "Pre-Close" Report.

System Module

Jump: Findley Auto Body (All Dates)

Est #: 6154 ECONOMON LOIS B Tech: Sch In: 10/12/2015 Status: Delivered Contact: None  
 RO #: 19219 2012 Nissan Altima P Tech: OP: 10/12/2015  
 Est Nm: Yolanda Newman C Tech: Sch Out: 10/16/2015  
 Ins Co: Selective Service Rpr Start: 10/13/2015 Warning: PARTS: 15 0 13 0 0 2 1 0  
 Deduct: \$500.00 Images: 0

Jobs Admin Line Items Parts Job Costs

500-Vendor Costs 501-Flag Labor 502-Timesheets 503-Analysis

Income: Cost:  
 Parts (New): 1409.27 1005.92  
 Aftermarket: 167.18 115  
 Used: 0 0  
 Recored: 0 0  
 Raman.: 0 0  
 Recondition: 0 0  
 Sublet: 69.99 49.95  
 Misc.: 20.15 0  
 Haz Waste: 5 0  
 Shop Supplies: 0 0  
 Towing: 0 0  
 Storage: 0 0  
 Paint Mats: 5147.9 409.32  
 Body Lbr: 1136.8 284.2  
 Refinish Lbr: 688.8 246  
 Mech Lbr: 195.5 32.2  
 Frame Lbr: 0 0  
 Stru Lbr: 0 0  
 Detail Lbr: 0 0  
 Glass Lbr: 0 0  
 Elec Lbr: 0 0

Printer: Microsoft XPS Document Writer Copies: 1 Preview Mode: Whole Page

Print

User: Summit User Location: NewDB Screen #503

13. Once the 'Pre-Close' Report is printed "click on" the Job History/Notes ICON.

Enter in a note "File Pre-Closed".

System Module

Jump: Eveland Bros. Body Shop In (All Dates)

Unit #: Crews Michael B Tech: SJB Sch In: 10/10/2013 Status: Reassembly Contact: None  
 RO #: 45122 1971 MGB MGB P Tech: OP: 7/31/2014  
 Est Nm: Unassigned C Tech: SJB Sch Out: 12/31/2015  
 Ins Co: State Farm Insurance Rpr Start: 12/9/2015 Warning: PARTS: 2 1 1 0 0 0 0 1  
 Deduct: \$0.00 Images: 9

Jobs Admin Line Items Parts Job Costs Job History/Notes

100-Assignments 101-Estimates 102-Open ROs 103-Closed

Public Category User Date Time Notes

Public	Category	User	Date	Time	Notes
✓	Parts	Jill Rizzo	11/17/2015	PM 02:00	Received parts from Auto Nation Ford White Bea La, Invoice#3510780-
✓	Import	Jill Rizzo	11/17/2015	PM 01:49	Job File Synchronization.
✓	Parts	Jill Rizzo	11/17/2015	AM 09:59	Received parts from Auto Nation Ford White Bea La, Invoice#3513283
✓	Import	Jill Rizzo	11/17/2015	AM 09:55	Job File Synchronization.
✓	Import	Jill Rizzo	11/17/2015	AM 09:54	Job File Synchronization.
✓	Parts	Jill Rizzo	11/17/2015	AM 09:51	Returned for credit: Brkt.Tire Pressure Sns LT
✓	Import	Jill Rizzo	11/17/2015	AM 09:51	Job File Synchronization.
✓	General	Jill Rizzo	11/17/2015	7:01:47 PM	Printed Job Cost Summary
✓	General	Jill Rizzo	11/17/2015	7:01:47 PM	Printed Pre-Close Report
✓	General	Jill Rizzo	11/17/2015	3:11:52 PM	Printed Warranty

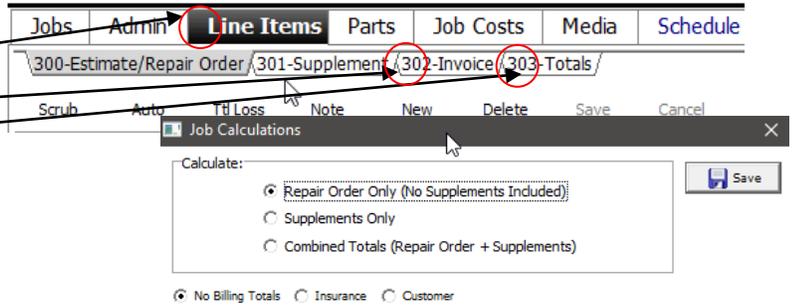
Search Idle

Expanded Notes

Est #: 6206 PUGACHOV IVAN B Tech: Sch In: 11/2  
 RO #: 19260 2005 Toyota Avalon P Tech: OP: 11/6  
 Est Nm: FRIDLEY AUTO BODY C Tech: Sch Out: 11/6  
 Ins Co: Esurnace Rpr Start:  
 Deduct: \$500.00 Images: 0

14. Print Customer Invoice:

- a. Locate customer name in *RO View*
- b. "Click on" *Line Items*
- c. "Click on" *Invoice*
- d. "Click on" *Totals*
- e. Verify all totals are correct
- f. "Click on" the *Print Icon*.



- g. Select Final *Invoice with Rates*.

15. Turn completed file over to CSR.

Jobs Admin **Line Items** Parts Job Costs Media Schedule Reports Messages

300-Estimate/Repair Order /301-Supplement /302-Invoice /303-Totals/ (All)

Print  Estimate Format

Description	Units	Rate	Total	G/L Account #
Estimate/Repair Order Totals				
Towing			\$356.00	4200
Sub Total			\$356.00	
MN Sales Tax (7.125%)			\$25.36	25500
GRAND TOTAL			\$381.36	
Minus Deductible			\$500.00	

**NOTE:** All Files should include the following paperwork:

- Summit Invoice
- ADP, CCC, or Mitchell Estimate
- Summit Pre-Close Report
- Copies of all invoices
- Signed Repair Authorization and Power of Attorney
- Signed Insurance Authorization and Direction to Pay (when applicable)
- Copy of Faxed Assignment (When applicable)

# Synchronizing and Parts Price Changes

## Synchronizing a Summit Repair Order with an Estimating System Supplement

1. Identify a Supplement in Summit (If a part price has changed or additional labor has been added IN SUMMIT a potential supplement will be identified with a GREEN "box" on the part price or labor column)

2. Click the *Line Items* tab and you will see that any Summit generated supplemental items will be highlighted in **GREEN**.

3. To view the details of the supplement, click on the *Supplement* tab. This will provide you with the supplement details.

4. Click on the *Print* icon to print the Summit Parts Price Change report.

5. Create the export file in the estimating system.

The screenshot displays the Summit software interface for a repair order. The main window shows the 'Line Items' tab, which lists various items with their descriptions, types, and prices. A 'Supplement' tab is also visible, showing details for a specific supplement. A 'Parts Price Change Report' is printed, showing details for 'Remove/Replace' and 'Refinish' items. The report includes columns for 'Customer Information', 'Vehicle Information', and 'Insurance Information'. The printer is identified as 'Microsoft XPS Document Writer'.

LibrOp	LibrTyp	Description	Type	Retail	LbrHrs	PntHrs	Part #	Pay
1	Remove/Replace	Body	Cover/Front Bumper	Aftermarket	\$231.00	1.7	ECONOMY PART	Total Loss Item
2	Refinish	Body	Cover/Front Bumper			3.7	REFINISH	Total Loss Item
3	Refinish	Body	Paint Materials	Paint Materials	\$133.20			Total Loss Item



# Sending Parts Price Changes BACK into Your Estimating Systems

Due to the CIECA EMS standard, you can send parts prices changes from Summit BACK to your estimating system.

1. Re-select the Repair Order in Summit with a *Part Price Change* (PPC). You can identify PPC's via the RO List Screen in the *PPC Column*.

2. "Click" on the PPC ICON and the PPC Selection Box appears.

3. "Tag" the parts with price changes that you want to send back to the estimating system and then "Click on" the *Send PPC* button.

The screenshot displays the Summit software interface. At the top, there's a header for 'System Module' and 'Eveland Bros. Body Shop In'. Below that, a summary section shows details like 'Unit #: Crews Michael', 'RO #: 45122', 'B Tech: SJB', 'Sch In: 10/10/2013', 'Status: Reassembly', and 'Contact: None'. A 'PARTS: 2' indicator shows a bar chart with colored segments. The main area is a table with columns: 'R.O. #', 'Sch In', 'Sch Out', 'TT', 'CDR', 'Dept/Status', 'Job Class', 'Total', 'Ins', 'Estimator', and 'Customer'. A 'PPC' column is visible, containing icons for parts price changes. A 'Parts Price Changes' dialog box is open, showing a table with columns: 'Tag', 'L #', 'Description', 'Price', 'Adj Price', and '% Diff'. The 'Tag' column has a 'PPC' icon next to it. At the bottom of the dialog, there are buttons for 'Print PPC List', 'Send PPC's', and 'Match Tagged'. The 'Send PPC's' button is highlighted with a red circle.

**NOTE:** to configure your system to benefit from this feature, please check with your estimating system company and ask them how to set up your estimating system to accept PPC's from Summit.

# Accessing and Utilizing Reports

**Information is Power!** The following pages will provide you with an overview of Summit's reporting capabilities. As you have seen there are many reports that are available in each section of the Summit application. In addition to the feature specific reports, Summit also offers you an unlimited number of business, operational, and financial reports by clicking on the *Reports* tab.

Once you access the Reports tab you will have hundreds of report options at your fingertips. You can select a *Report Type* by clicking on the *Report Folder* and then the specific *Report #*

**Job #:** 6242     **John Doe**     **B Tech:**     **Sch In:** 1/1/1900     **Status:** Not Assigned     **Contact:** None  
**RO #:** 0     **P Tech:**     **OP:**     **Sch Out:** 1/1/1900     **Warning:**     [Notes](#)  
**Est Nm:** Jill Rizzo     **C Tech:**     **Rpr Start:**     **Warning:**  
**Ins Co:** AAA     **Images:** 0     **PARTS:** 0 0 0 0 0 0 0 0  
**Deduct:** \$0.00

Jobs | Admin | Line Items | Parts | Job Costs | Media | Schedule | **Reports** | Messages

[Legacy](#)  
[ReportPro](#)  
[Graphs](#)  
[KPINet](#)

SummitCRS Reports

**800-Reports**

010-Sales

020-Work In Process  
 030-Production  
 040-Parts  
 050-Job Costs  
 060-Labor/Payroll  
 070-Accounts Rec.  
 080-Marketing  
 090-Performance  
 100-General

Print | Graphs

011-Sales Journal  
 012-Sales Journal Summary  
 013-Labor Sales Journal  
 014-RO Sales Journal  
 015-Sales Tax Report  
 016-Total Loss Analysis

Once you select a report type place a check in the box of the report you would like to print. You can print multiple reports if you place multiple checks in multiple boxes. When you are ready to print, "click" on the *Print Icon* at the top left of the screen.

Print Options

Report Parameters:  
 Start Date: 5/1/2016     End Date: 5/26/2016     Sort Order: RO #  
 Utilize Delivery Date instead of Closed Date where Applicable.

Select Companies:

Tag	Name
<input type="checkbox"/>	(All)
<input type="checkbox"/>	21ST CENTURY N AMER INS
<input type="checkbox"/>	AAA
<input type="checkbox"/>	Acuity Ins
<input type="checkbox"/>	Ahens Ins
<input type="checkbox"/>	All State Ins. Co
<input type="checkbox"/>	Allied Ins
<input type="checkbox"/>	American Family Ins.
<input type="checkbox"/>	American Nat & Casu
<input type="checkbox"/>	Ari Fleet
<input type="checkbox"/>	Auto Owners Ins
<input type="checkbox"/>	BFS
<input type="checkbox"/>	Blaine Police Department
<input type="checkbox"/>	Bristol West
<input type="checkbox"/>	CEI Ins Services
<input type="checkbox"/>	CertFit
<input type="checkbox"/>	Choose Broadspire
<input type="checkbox"/>	Chubb Group of Ins
<input type="checkbox"/>	City Auto Glass

Select Job Classifications:

Tag	Name
<input type="checkbox"/>	(All)
<input type="checkbox"/>	Same Day Repair
<input type="checkbox"/>	Express Repair
<input type="checkbox"/>	Light Sheet-Metal
<input type="checkbox"/>	Medium SheetMetal-S

Select Estimators:

Tag	Name
<input type="checkbox"/>	(All)
<input type="checkbox"/>	
<input type="checkbox"/>	

Select CSRs:

Tag	Name
<input type="checkbox"/>	(All)
<input type="checkbox"/>	
<input type="checkbox"/>	

Start | Cancel | Export

Once you select the **Print ICON** you will be asked to select a **start and end date**. You will also be given the opportunity to **Sort** by Insurance Company, Estimator, and/or RO#, Scheduled In, Out, and Estimator.

Once you have completed this selection you now can select individual, multiple, or **All Companies, Repair Classifications, Estimators, and CSR's**. You can also any report to Excel and customize it for your needs!



# Recommended Reports: Daily, Weekly, Monthly Reports

## Weekly Payroll

System Module

Jump: [Icons] Fridley Auto Body (All Dates)

Est #: 6206 PUGACHOV IVAN B Tech: Sch In: 11/2/2015 Status: Ins/Auth Hold Contact: None  
 RO #: 19260 2005 Toyota Avalon P Tech: OP: 11/6/2015 L Notes

Est Nm: FRIDLEY AUT Ins Co: Esurnace Deduct: \$500.00

SummitCRS Reports

**800-Reports**

Jobs Admin

Legacy  
ReportPro  
Graphs  
KPINet

- 010-Sales
- 020-Work In Process
- 030-Production
- 040-Parts
- 050-Job Costs
- 060-Labor/Payroll
- 070-Accounts Rec.
- 080-Marketing
- 090-Performance
- 100-General

Print Graphs

- 060-Manual Entry Timesheet
- 0610a-Flagged Labor Summary Report
- 0610-Flagged Labor Report
- 0611-Flagged Labor (No Cost)
- 0613-Team Payroll
- 0620-Timesheets by Employee
- 0621-Timesheets by Date
- 0626-Timesheet Summary by Cost Center
- 063-Technician Bank Report
- 064-Labor Profit Analysis

This report to be used for Flat Rate Payroll

This report to be used for hourly employees

This report to be used to give to techs re: payroll info

## Sales and

System Module

User: Summit User Location: NewDB Screen #800

Jump: [Icons] Fridley Auto Body (All Dates)

Est #: 6206 PUGACHOV IVAN B Tech: Sch In: 11/2/2015 Status: Ins/Auth Hold Contact: None  
 RO #: 19260 2005 Toyota Avalon P Tech: OP: 11/6/2015 L Notes

Est Nm: FRIDLEY AUT Ins Co: Esurnace Deduct: \$500.00

SummitCRS Reports

**800-Reports**

Jobs Admin

Legacy  
ReportPro  
Graphs  
KPINet

- 010-Sales
- 020-Work In Process
- 030-Production
- 040-Parts
- 050-Job Costs
- 060-Labor/Payroll
- 070-Accounts Rec.
- 080-Marketing
- 090-Performance
- 100-General

Print Graphs

- 0900-Employee Activity Audit
- 0901-CSI Performance
- 0902-Rental Car Performance
- 091a-GP Summary w/Total Loss
- 091-Gross Profit Summary
- 0920-Technician Efficiency
- 0921-Technician Efficiency Summary
- 0922-Applied Labor
- 093-Team Efficiency
- 094a-Estimator Analysis Report
- 094b-Insurance Analysis Report
- 095a-Batting Average by Estimator
- 095b-Batting Average by Insurance Company
- 096a-Conversion Rate by Estimator
- 096b-Conversion Rate by Insurance Company
- 097a-Shop Pay List (Open ROs)
- 097b-Shop Pay List (Closed ROs)
- 098-Lost Business Analysis
- 099-Touch Time (Vehicle)

User: Summit User Location: NewDB Screen #800

# Sales and Marketing: Weekly

System Module

Jump: [Icons] Fridley Auto Body (All Dates)

Est #: 6206 PUGACHOV IVAN B Tech: Sch In: 11/2/2015 Status: Ins/Auth Hold Contact: None  
 RO #: 19260 2005 Toyota Avalon P Tech: OP: 11/6/2015 Notes

Est Nm: FRIDLEY AU  
 Ins Co: Esurnace  
 Deduct: \$500.00

SubmitCRS Reports

### 800-Reports

Print Graphs

- 010-Sales
- 020-Work In Process
- 030-Production
- 040-Parts
- 050-Job Costs
- 060-Labor/Payroll
- 070-Accounts Rec.
- 080-Marketing
- 090-Performance
- 100-General
- 080-Customer Address List
- 081-Customer Satisfaction Follow Up
- 082a-Outsourced CSI (Delivered)
- 082-Outsourced CSI
- 0831-Source Detail
- 083-Source Analysis Report
- 084-Referral Source Analysis
- 085a-Referral Source Detail (In)
- 085-Referral Source Detail
- 086-Estimate Follow Up List

Jobs Admin

[Legacy](#)  
[ReportPro](#)  
[Graphs](#)  
[KPINet](#)

User: Summit User Location: NewDB Screen #800

# Work in Process: Monthly

System Module

Jump: [Icons] Fridley Auto Body (All Dates)

Est #: 6206 PUGACHOV IVAN B Tech: Sch In: 11/2/2015 Status: Ins/Auth Hold Contact: None  
 RO #: 19260 2005 Toyota Avalon P Tech: OP: 11/6/2015 Notes

Est Nm: FRIDLEY AU  
 Ins Co: Esurnace  
 Deduct: \$500.00

SubmitCRS Reports

### 800-Reports

Print Graphs

- 010-Sales
- 020-Work In Process
- 030-Production
- 040-Parts
- 050-Job Costs
- 060-Labor/Payroll
- 070-Accounts Rec.
- 080-Marketing
- 090-Performance
- 100-General
- 0200-Accounting WIP Summary
- 0201-Accounting WIP Detail
- 021-WIP Sales Report
- 022-WIP Cost Detail
- 023-WIP Cost Summary
- 024-WIP Labor Detail
- 0251-WIP Labor Balance (Actual)
- 025-WIP Labor Balance (Flags)
- 0261-Not In Process Report
- 026-WIP Status Report
- 027-WIP Warning Flag Report
- 028-Total Loss Analysis
- 029-WIP Delivered

Jobs Admin

[Legacy](#)  
[ReportPro](#)  
[Graphs](#)  
[KPINet](#)

User: Summit User Location: NewDB Screen #800

# Technician Efficiency: Weekly

System Module

Jump: [Icons] Fridley Auto Body (All Dates)

Est #: 6206 PUGACHOV IVAN B Tech: Sch In: 11/2/2015 Status: Ins/Auth Hold Contact: None  
 RO #: 19260 2005 Toyota Avalon P Tech: OP: 11/6/2015 Notes

Est Nm: FRIDLEY AUT Ins Co: Esurnace Deduct: \$500.00

SummitCRS Reports

**800-Reports**

Jobs Admin

Legacy  
ReportPro  
Graphs  
KPINet

010-Sales  
020-Work In Process  
030-Production  
040-Parts  
050-Job Costs  
060-Labor/Payroll  
070-Accounts Rec.  
080-Marketing  
090-Performance  
100-General

Print Graphs

0900-Employee Activity Audit  
 0901-CSI Performance  
 0902-Rental Car Performance  
 091a-GP Summary w/Total Loss  
 091-Gross Profit Summary  
 0920-Technician Efficiency  
 0921-Technician Efficiency Summary  
 0922-Applied Labor  
 093-Team Efficiency  
 094a-Estimator Analysis Report  
 094b-Insurance Analysis Report  
 095a-Batting Average by Estimator  
 095b-Batting Average by Insurance Company  
 096a-Conversion Rate by Estimator  
 096b-Conversion Rate by Insurance Company  
 097a-Shop Pay List (Open ROs)  
 097b-Shop Pay List (Closed ROs)  
 098-Lost Business Analysis  
 099-Touch Time (Vehicle)

User: Summit User Location: NewDB Screen #800

# Payment Report: Daily

System Module

Jump: [Icons] Fridley Auto Body

Est #: 6206 PUGACHOV IVAN B Tech: Sch In: 11/2/2015 Status:  
 RO #: 19260 2005 Toyota Avalon P Tech: OP: 11/6/2015 L

Est Nm: FRIDLEY AUT Ins Co: Esurnace Deduct: \$500.00

SummitCRS Reports

**800-Reports**

Jobs Admin

Legacy  
ReportPro  
Graphs  
KPINet

010-Sales  
020-Work In Process  
030-Production  
040-Parts  
050-Job Costs  
060-Labor/Payroll  
070-Accounts Rec.  
080-Marketing  
090-Performance  
100-General

Print Graphs

070-Aged Sales Ledger  
 071-A/R By Date  
 072-AR Payment Analysis  
 073-Receipt Summary by Estimator  
 074-Statement of Account