User Manual

REPORT AND REFERENCE MANUAL

Introduction

Welcome to Summit. This manual is designed to help you manage your shop using Summit. Summit consists of four modules: Administration, System, TechCentral and Accounting. Each of these modules, along with the general operations that go along with each, will be discussed in this manual. This book is designed to give you step-by-step instructions on how to use Summit. Please refer to the Table of Contents to find answers to specific questions you might have about the system.

As stated, Summit has four modules. The Administration Module is used to set the parameters and settings you want to use in the system. This includes general shop data, vendor lists, employee passwords, etc. The System Module is where most of the work in Summit is done. This is where you will manage your shop. The TechCentral Module is an integrated time clock, allowing you to track timesheets as well as technician performance. Lastly, the Accounting Module is used to export data to your accounting system and view general accounting data for a specified date range. Each of these modules will be covered in greater detail later in this manual.

A lot of information will be tracked and managed using Summit. Summit was designed to work on a "client-server" basis, allowing shops to operate the system on several different machines over a network. To manage and distribute this information over a network, Summit has two parts: the DBServer, which will be installed and run on the network server, and the Summit Client (normally referred to as just "Summit"), which will be installed on any or all workstations in the shop. This manual does not discuss use and configuration of the DBServer because, for the most part, you will not use the DBServer itself. Summit uses the DBServer to send and request data from the database. Please contact Summit Support if you have DBServer-related questions or problems.

Getting help for Summit is easy. Log into the System, Administration, or Accounting module. Click the blue circle with the question mark located in the top right of your screen. This will take you to the Summit Support website. The Knowledge Base is a searchable database with hundreds of questions and answers.

Administration Module

Introduction

The Administration Module controls how Summit works and allows you and your employees to customize the system to your shop. This is where you enter things like shop information, vendor and insurance company lists, and shop rates. The Administration Module is where you will set up production departments, scheduling controllers and create a centralized list of Standard Operating Procedures for your shop.

Administration Module Layout

The Administration Module has two general areas: a header area located along the top of the Administration Module window, and a table area located below the header area (occupies the majority of the window). The header area is where you will choose what you want to set up. It is arranged into eight buttons: Company, Rates, Contacts, Employees, Production, Security, SOP and Other. These eight buttons represent general setup categories. Each of these buttons has tabs that represent specific categories in the chosen button. You will see how these work, as you get familiar with the module. These tabs are located directly below the eight buttons.

The table area of the Administration Module is where you will enter or edit system setup data. The table area at times includes a utility toolbar, which contains navigation tools to move through lists in the system, book-marking tools, as well as save and delete functions. This manual will indicate when you need to use this tool bar.

System Setup in the Administration Module

You are now ready to begin setting up the system and entering your shop's data into Summit. This manual will go through each button and each tab, from left to right, beginning with the Company button. If you need to find specific information, consult the Table of Contents.

Company Button

There are 12 tabs (subcategories) in the Company button: General, Accounting, Defaults, Custom Fields, System Paths, Closing Parameters, Business Rules, Multi Location, Scheduling, Goals, Labor Distribution, and KPINet. Each of the tabs are important and contain information vital to the operation of the system. Make sure that

all information you enter is correct and up-to-date. Summit uses this information frequently, and if the information is entered incorrectly the system will not function properly. However, if you do make a mistake, or you need to make a change, it is simple to edit the information. In addition, if problems arise that this manual does not address, please call Summit Support @ (208) 947-1738 ext. 10 for assistance.

General Tab

The General tab is where you enter basic company information like your company name, address and phone number. This information will be printed on many of the reports available in Summit, so make sure the information is spelled correctly and appears EXACTLY how you want it to look on a final invoice (your company information entered here will be printed on final invoices and parts orders, among others; the shop information will appear just as you enter it).

Enter Basic Shop Information Into Summit

1. Log into the Administration Module
2. Click on the Company button
3. Click on the General tab
4. Click on the line you would like to edit
5. Make the necessary changes (if you are setting the system up for the first time, erase the default information on the line and then enter your shop information)
6. Click on the orange Cancel button to cancel any changes you made in the tool bar on the right side of the screen. Click on Save to save any changes you made.

Accounting Tab

Please contact Summit Support **@ (208) 947-1738 ext. 10** for help setting up the Accounting tab. They will need to know which accounting system you are using (QuickBooks, QuickBooks Canada, Peach Tree, Business Works), your cost and sales account numbers, and item codes if applicable.

Custom Accounts are also available in this tab. Custom accounts are cost centers that you create. Please contact Summit Support **@ (208) 947-1738 ext. 10** for more information

Defaults Tab

The Defaults tab contains system defaults for several different things. First, general default information for estimates manually created in Summit can be entered in this tab. This information includes City, State/Province, Postal Code, and Area Code. This data will not appear if you import an estimate from another program (Mitchell, ADP, CCC).

Create Default Information for Estimates Created in Summit

1. Log in to Administration Module
2. Click on Company button
3. Click on Defaults tab
4. Click on the line you would like to edit. The first four lines are the information related to estimates created in Summit
5. Click on the blue Save button to save your changes

Set/Adjust The Interoffice Mail Interval

The Interoffice Mail Interval sets the default for how often the DB Server checks for interoffice mail (between Summit users) to deliver or receive. If you will be sending a lot of messages between users of Summit, you will want the interval to be relatively short. This will cause messages to be sent and received more quickly. However, this will slow your system down somewhat. A five-minute interval should be adequate for most shops.

1. Log in to Administration Module
2. Click on Company button
3. Click on Defaults tab
4. Adjust the interval by clicking the up or down arrows
5. Click the blue Save button to save the change

Change The Admin Password

The General tab is also where you create or edit your Admin Password. The Admin Password is used to void ROs, log in and out of the TechCentral Module, and manually change RO numbers. Be sure to remember this password.

1. Log into the Administration Module
2. Click on the Company button
3. Click on the General tab
4. Click on the Admin Password line

5.   Edit the password
6.   Click on the blue Save button to save any changes

NOTE: The Admin Password is case sensitive. If you create a password using all lower case letters, it must be entered using all lower case letters when asked for in the system. You will get an error message if you use capital letters when the password was created using lower case letters.

In addition, there is a Business ID line. This line is optional, and can be anything you want. However, the Business ID line is printed with the other shop information on final invoices etc., so make sure it is public information. You may also choose to have nothing in the line.

Choose whether or not The Login Password will be Cleared

The two remaining defaults are related to logging in to Summit. The first will allow you to decide whether or not the login password is cleared at each login. If the box for this default is not checked then the login name and password will NOT be cleared until Summit is closed completely, or another user changes them. If the check box is checked then the login name and password fields will be empty every time the Login Screen appears.

1.   Login to Administration Module
2.   Click on Company button
3.   Click on Defaults tab
4.   Place a check mark in the check box labeled "Clear password characters at each login" to clear the login password at each login. If there is a check in the box, and you do not want the login password to clear, click in the box to uncheck it.
5.   Click the blue Save button to save the change

Setting Disable "Sticky" Reports option.

Sticky Reports is a function that saves the selected reports you printed last. The last reports printed are still selected for print in the same report selection screen. Check this as disabled if your shop uses terminal workstations. To disable the sticky reports, follow the steps listed below. Sticky Reports do not apply to the Reports section. This setting applies to the individual workstation only.

1.   Login to Administration Module
2.   Click on Company button
3.   Click on Defaults tab
4.   Place a check mark in the check box labeled "Disable "Sticky" Reports".

5.   Click the blue Save button to save the change.

Setting Disable Production Panel Statistics option.

This option is used for shops that wish to display the Production screen to their technicians. Checking this button removes the buttons and the dollar amounts from the top of the screen. This setting applies to the individual workstation only.

1.   Login to Administration Module
2.   Click on Company button
3.   Click on Defaults tab
4.   Place a check mark in the check box labeled "Disable Production Panel Statistics".
5.   Click the blue Save button to save the change.

Setting Default Date Ranges to View Estimates/Assignments and Closed RO's

Summit allows you to set the default number of days back you would like to view estimates and closed repair orders. This brings the most pertinent information to you. To set the defaults:

1.   Log in to Administration Module
2.   Click on Company button
3.   Click on Defaults tab
4.   Enter the number of days back you would like to view your estimates and closed repair orders
5.   Click the blue Save button to save the change

Set # days back to view Closed ROs and Estimates/Assignments

Enter a number you would deem appropriate in these fields.
  Note: We recommend 180 days for Closed ROs and 90 days for the Estimates/Assignments.

Closed ROs: Summit, in the System Module, will hide a Closed RO once the RO is closed for the number of days listed in this field (the date it uses is the Closed Date). To view older Closed ROs right mouse click "Closed:" in the System Module and select Specify Date Range.

Estimates/Assignments: Summit, in the System Module, will hide an Estimate once the Estimate/Assignments is older than the number in this field (the date it uses is the Estimate Created Date). To view older Estimates/Assignments right mouse click the "Est#:" in the System Module and select Specify Date Range.

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Set The Default Screen State

Default Screen State allows you to control whether Summit opens maximized (fills the whole screen) or opens normal (fills most of the screen). This setting applies to the individual workstation only.

1. Log in to Administration Module
2. Click on Company button
3. Click on Defaults tab
4. Choose the screen state you would like
5. Click the blue Save button to save the change

Custom Fields Tab

The Custom Fields tab allows you to name custom dates. These custom dates are in the Admin screen in the System module. The dates are available in the Cycle Time Analysis Reports. They can also be made mandatory when closing an RO. (See Business Rules 97 – 100)

System Paths Tab

The System Paths tab allows you to designate where Summit imports information from and where it exports information too. Summit interfaces with the following estimating systems: Mitchell UltraMate, CCC Pathways, and ADP ShopLink. Summit interfaces with the following accounting systems: Intuit QuickBooks, Peachtree Complete, and BusinessWorks. The System Paths tab is where you set up the directory paths to each of these systems.

Set Up the Directory Paths To ADP, CCC, or Mitchell Estimating Systems

1. Log in to Administration Module
2. Click on Company button
3. Click on System Paths tab
4. You can set up Summit to import data from, and export data to, ADP, CCC and Mitchell estimating systems. **Note:** You will need to consult your estimating documentation to find your estimating system's import and export path(s). You will need to set up the paths for each estimating system you would like to import from and export to.
5. The lines labeled by the estimating system followed by '(EMS)' are the import paths from the estimating systems. These are the folders your estimating system exports to and Summit imports from. The paths labeled by the estimating

system followed by '(PPC)' are the paths Summit uses to send information back to the estimating system (parts price changes, etc).

6.   Click on the button with three dots on it next to the path you would like to set up

7.   The Browse for Folder window will appear

8.   Search for the correct drive and folder, highlight the folder, and click OK

9.   Repeat steps 1-6 on EACH workstation

NOTE: You CANNOT manually enter ANY path in the System Paths tab. You MUST browse for them using the procedure just described

Setup the Export Path

The Export field is the location that Summit will export accounting information. This setting applies to the individual workstation only. Support technicians at Summit Support should set up the Export Path. Please call Technical Support **@ (208) 947-1738 ext.10** for assistance.

Setup The Images Path

The Images path is the file Summit stores images in. Summit will store both digital pictures and scanned images of invoices in this folder. A folder will need to be created on your network server to store these images in. This folder can be created anywhere on the server. However, we suggest you create the new folder in the \DBServer\Data folder. Do this by double clicking on the My Computer icon on the desktop of server, or in the case of a peer-to-peer network, the computer with the DB Server installed on it. Double click the drive the DB Server is installed. Then double click on the DB Server folder. In the DB Server folder double click on the Data folder. Right click anywhere on the main part of the screen and choose New. Then choose Folder. Name the folder "Summit Images".

1.   Log in to Administration Module

2.   Click on Company button

3.   Click on System Paths tab

4.   Click on the button with three dots on it

5.   Browse to find the folder you just created on the server, select it and click OK.

6.   Repeat steps 1-5 on each workstation

Enable Using the Actual Vehicle Image in The Production View

Summit can use the actual vehicle image in the Production View (explained later) instead of a generic vehicle image. If this is enabled, Summit uses the first image in the subfolder for the RO. If no images exist for the RO, the default image will be used.

1. Login to Administration Module
2. Click on Company button
3. Click on System Paths tab
4. Put a check mark in the box labeled "Use Actual Vehicle Image in Production View"

Enabling TechCentral Imaging

TechCentral has the ability to allow the technicians to add digital images to the RO they are working on. They take pictures with a digital camera then connect it to the computer running TechCentral. For more details on this feature see the TechCentral guide or contact Technical Support @ (208) 947-1738 ext.10 for assistance.

Setting the Fax Path

The Fax Path also needs to be set up by technicians at Summit Support. Please uncheck the box labeled "Enable Local Faxing" and call Summit Support if you want to use the faxing feature in Summit (if FastTrack training was included in your purchase, the fax path and fax server will be set up during your training)

Enable Local Faxing

Enable Local Faxing is used for those workstations with the Fax Client. The Fax Client is a plug-in for Summit C.O.P.S. If enabled, it will run on your taskbar and will display the status of the faxes sent from the local workstation. To see the status right mouse, click the gray icon in the system tray and select View Fax Client. There are three tabs Pending, Sent, and unsuccessful.

Enabling the Alternate Fax Server

Enabling the Alternate Fax Server allows Summit to interface with Symantec's WinFax Pro 10.0. . For more details on this feature see the TechCentral guide or contact Technical Support @ (208) 947-1738 ext.10 for assistance.

Closing Parameters Tab

Set Closing Parameters

The Closing Parameters tab is where you set the acceptable profit percentage range that most repair orders fall in. You will get a visual indication if the profit percentage is outside the acceptable profit percentage range. The percentage will show in bold red numbers on the RO Closing screen.

1.   Log in to the Administration Module
2.   Click on the Company button
3.   Click on the Closing Parameters tab
4.   Highlight the field labeled "Acceptable Profit % Starting Range"
5.   Enter the low value in the percentage range (if the range is 30%-50%, enter 30, you do not need to enter the "%" sign, only the number)
6.   Highlight the field labeled "Acceptable Profit % Ending Range"
7.   Enter the high value in the percentage range
8.   Click the blue Save button on the right to save the changes

Create/Edit The Closing Password

The Closing Password is the password used to override the acceptable profit % range. If you have a job to close with a profit margin outside the acceptable profit % range, Summit will ask for a password. Enter the Closing Password to close the RO.

1.   Log in to the Administration Module
2.   Click on the Company button
3.   Click on the Closing Parameters tab
4.   Highlight the field labeled "Closing Password"
5.   Enter the new password
6.   Click the blue Save button on the right to save the change

days back to view Closed ROs

This field is the same field in the Defaults tab.

Closed ROs: Summit, in the System Module, will hide a Closed RO once the RO is closed for the number of days listed in this field (the date it uses is the Closed Date). To view older Closed ROs right mouse click **Closed**: in the System Module and select Specify Date Range.

Business Rules (See the Business Rules Guide)

Multi Location Tab

The Multi Location tab is used to help identify shop locations for companies with multiple locations. Contact Summit Support @ (208) 947-1738 for more information

Scheduling Tab

The Scheduling tab allows you to set up Summit's integrated scheduling program. The scheduling program will help you decide the best days to schedule jobs and helps manage your shop time more efficiently. By entering the number of labor hours per day in your shop, Summit will automatically find the optimal day to begin work on a new repair order. You can also create exception days (for holidays or employee vacation days) to maintain a correct picture of how many labor hours are in the shop.

Set Scheduling Parameters for Summit

1. Log in to the Administration Module
2. Click on the Company button
3. Click on the Scheduling tab
4. Highlight the field labeled "Production Hours per Day"
5. Enter your shops production hours per day (this is calculated by dividing your total number of labor hours per month by 21.5; the formula is located on the screen)
6. Click on the Save icon in the toolbar located on the right side of your screen to save the change
7. Highlight the field labeled "Labor Variance %"
8. Enter the labor variance percentage for your shop (this is the percentage above or below your shops production hours per day that is normal for your shop; this allows a little wiggle room for your shop schedule)
9. Click on the Save icon in the toolbar located on the right side of your screen to save the change

Schedule Exception Days for The Shop

You can also schedule exception days in your shop. As stated before, these include holidays for the entire shop (Thanksgiving, Christmas and others) or days when you have employees on vacation. Exception days adjust the number of production hours in your shop for that day to reflect the absence of one or all employees.

1. Login to the Administration Module
2. Click on the Company button

3.	Click on the Scheduling tab

4.	If you are creating an exception day for a single employee (time off, vacation, etc.) skip to step 6

5.	If you are creating an exception day for the entire shop (holiday), double-click the day in the calendar located in the lower left. Enter the description of the holiday in the window that appears and click OK. Skip to step 8

6.	If you are creating an exception day for one employee, click on the Add button located in the toolbar below the list of exception days. This will create a new line in the exception day list

7.	Highlight the new line and enter the date, number of hours to subtract from the total daily labor hours, and a brief description of the exception

8.	If you are adding more than one exception day, click the refresh button and follow steps 4-7 for each day

Goals Tab

The Goals tab allows you to set profitability, sales and efficiency goals for your shop. These goals affect several different parts of the System Module. The center of the window contains goals for parts and labor profitability. These goals are optional, so if you do not want to use them, or have no use for them, you do not need to fill in any values. As stated, these goals can be split into three categories: profitability, sales and efficiency. You may use one, two or all three of these goal categories. A short description and instructions for use follow:

1.	Profitability – this section sets goals for profitability for each cost center (labor, parts, other) available. This includes all labor and part types.

2.	Sales – Monthly Sales Goal, which sets a sales goal for each month that appears at the top of the Production View in the System Module.

3.	Efficiency – this goal affects TechCentral and time clock hours. This is the target efficiency for technicians.

To set any or all of these goals:

1.	Log in to the Administration Module

2.	Click on the Company button

3.	Click on the Goals tab

4.	Find and highlight the goal you would like to enter or change

5.	Enter the value into the field. For profitability goals, enter a percentage between 0 and 100. For Sales, enter the desired Monthly Sales Goal in Dollars. For Efficiency, enter a percentage, most likely over 100%

6.	Repeat steps 4 and 5 for any additional goals you would like to set.

7.	When you are finished entering or changing goals, click the Save button located in the utility toolbar

Capacities: Open RO hours/Units/Dollars

The Open RO hours field is the total hour capacity your shop can produce in 30 days. The Units field is the total number of vehicles repaired or ROs that can be completed in 30 days. The Dollars field is the maximum dollar amount your shop can produce in 30 days. These numbers can be figured using the number of work stalls, average dollar amount per RO, number of ROs, etc.

Labor Distribution Tab

The Labor Distribution tab allows you to reduce the labor times shown on worksheets by a certain percentage. This can be done for each specific labor type. For example, if labor distribution was activated with "10%" for Body Labor. Then the worksheet for a technician assigned 10 hours would actually show nine hours assigned to the tech. **Note:** Labor distribution is for technician worksheets ONLY and has NO effect on any other part of Summit.

To use this feature:

1. Log in to the Administration Module
2. Click the Company Button
3. Click the Labor Distribution Tab
4. Place a check in the Activate Distributions checkbox
5. Enter the percentage you would like removed from the worksheets for each labor type.
6. Click the checkmark in the lower right corner to save your changes

KPINet (Key Point Indicators)

KPINet is a tool used to help you, the shop owner, where the strong and weak points are. It also gives you benchmarks based on industry standards. KPINet will also send you an email daily giving you key point information on your shop. For more information, contact Summit Support @ 208-947-1738 x10.

Rates Button

The Rates button will allow you to set up general shop rates for estimates created in Summit. There are two tabs in the Rates button: Shop Rates and Admin. The Shop Rates tab is a list of all rates used for estimates created in Summit. The Admin tab is where you will create or edit your different shop rates. The Admin tab is also where you will set up the tax rates that apply to each shop rate.

Create Shop Rates for Estimates Created in Summit

1. Log in to the Administration module
2. Click on the Rates button
3. Click on the Shop Rates tab
4. Click the New button in the toolbar on the left side of the screen. This will automatically move you to the Admin tab where you can edit the information
5. If you are creating a new rate, click on the field labeled "Rate Name" and enter the name of the new rate
6. Enter the rate for each body type in the appropriate fields (enter the Body Labor rate in the field labeled "Body" etc.)
7. Summit supports a tiered tax system. Enter the tax rates for each level in the column labeled "Percent" and enter the ranges that those tax rates apply to. If you have only one tax level, enter the tax percentage and then have the first level range be $0-$999,999.99 (note that your top tax level will always have to end with $999,999.99)
8. Place a check mark in the labeled "Tax Labor" if you are required to tax labor
9. Click the Save icon in the toolbar to the right to save the changes
10. Follow steps 4-10 for each labor rate you want to set up

Edit Shop Rates Used for Estimates Created in Summit

1. Log in to the Administration Module
2. Click on the Rates button
3. Click on the Shop Rates tab
4. Highlight the rate you would like to edit
5. Click on the Admin tab and the information for the selected rate will appear
6. Select the field you would like to edit
7. After you have made all the changes, click on the Save icon in the toolbar to the right to save the changes

Contacts Button

The Contacts button manages several important lists of contacts: insurance companies, vendors, rental car companies and general contacts. These lists will be used throughout Summit. It will help you keep track of information like DRP required tasks, vendor discounts, and required daily allocation of hours for insurance companies.

Insurance Company Tab

The Insurance Company tab is divided into three different sub-tabs: List, Admin and Required Task List. The list sub-tab is exactly as it sounds: a list of all insurance companies you have entered into Summit. The Admin sub-tab allows you to edit any insurance company in the list. The Required Task List sub-tab allows you to enter the list of required tasks (if any) for each insurance company.

Create/Edit The Insurance Company List

1. Log in to the Administration Module
2. Click on the Contacts button
3. Click on the Insurance Companies tab
4. Click on the List sub-tab
5. Click the New button located in the toolbar to the left. Clicking the New button will automatically take you to the Admin sub-tab.
6. Create a unique contact code for the insurance company. This code must be unique for ALL contacts (insurance companies, vendors, and rental car companies). In other words, an insurance company and a vendor CANNOT have the same code. We require using the same codes as you use in your accounting package (not required for QuickBooks users).
7. You may now enter the insurance company information in the fields provided. Summit has the ability to automatically notify your contacts of the status of an RO via email or fax (this will be explained later). If you plan on using these features, be sure to enter the insurance companies fax # (you must enter the fax number exactly as it should be dialed manually) and email address.
8. In addition, if you work with insurance companies that require you to work on a vehicle for a certain number of hours per day, the number of hours/day required should be entered in the field labeled "Allocate Hrs/Day"; Summit will automatically assign the entered number of hours when the repair order is created
9. Click on the Save icon in the toolbar to save the record

Create a Required Task List for DRP Insurance Companies

Summit will also manage your DRP required tasks. The system will ensure that all lines on the required task list are completed before the RO is closed. Summit will not allow you to close a job until ALL lines on the required task list are completed.

1. Log in to the Administration Module
2. Click on the Contacts button
3. Click on the Insurance Company tab

4.   Click on the Required Task List sub-tab
5.   Click on the New button located in the toolbar BELOW the list
6.   Add lines to the required task list as needed
7.   Click the Save icon located in the toolbar BELOW the list to save the changes

Note: These tasks will be used in a portion of the System Module; remember that RO's with required tasks CANNOT be closed until all tasks have been checked off (to be explained later).

Delete A Record in the Insurance Company List

1.   Log in to the Administration Module
2.   Click on the Contacts button
3.   Click on the Insurance Companies tab
4.   Click on the List sub-tab
5.   Highlight the record you would like to delete
6.   Click on the Delete (red X) icon located in the toolbar below sub-tabs
7.   Confirm that you want to delete the record and the record will be deleted

Print The Insurance Company List

1.   Log in to the Administration Module
2.   Click on the Contacts button
3.   Click on the Insurance Companies tab
4.   Click on the List sub-tab
5.   Click on the Print icon in the utility toolbar
6.   The Print window will appear. Put a check in the box labeled "Insurance Company List" and click the Print button
7.   The Report Preview window will appear. Click Print icon to print the list

Vendors Tab

The Vendors tab manages vendor information for your shop. This information will be used when processing parts and applying vendor costs. The Vendors tab will store basic data like addresses, but will also keep track of vendor discount percentage and default part types.

Create/Edit The Vendor List

1.   Log in to the Administration Module
2.   Click on the Contacts button
3.   Click on the Vendors tab
4.   Click on the List sub-tab
5.   Click on the New icon located in the toolbar under the sub tabs. This will automatically take you to the Admin tab.
6.   Create a unique contact code for the vendor. Remember that this code CANNOT be the same as a contact code used for either a rental car company or an insurance company. This code can be up to 10 characters long.
7.   Enter the appropriate information in the fields requested. As with insurance companies, if you are you using automatic notification you must fill in the email and fax # fields (you must enter the fax number exactly as it should be manually dialed on a fax machine).
8.   Summit will also track your discount percentage from your vendors. Enter the average discount percentage for each vendor in the field labeled "Discount" (Summit uses this number to calculate assumed cost when ordering parts).
9.   Fill in the "Default Make" with each vehicle make the vendor sells. (Use something like the following example: DODGE;Ford;Chevy)
   Note: It is only necessary to use the first four letters of the "Make" name. Use a semi colon to separate and add subsequent "Makes". DO NOT use spaces between each "Make". To set a Default Vendor for aftermarket, LKQ/Used, Towing, or Sublet use in the word "Default" for the "Make" and select the appropriate Part type.
10.   Fill in the "Default Part Type" with the Part Type the vendor sells
   Note: To set a Default Vendor Part Type for aftermarket, LKQ/Used, Towing, or Sublet use in the word "Default" for the "Make" and select the appropriate Part type.
11.   After all the information has been entered, click the Save Icon on the toolbar.

Delete A Vendor Record from the List

1.   Login to the Administration Module
2.   Click on the Contacts button
3.   Click on the Vendors tab
4.   Click on the List sub-tab
5.   Click on the Delete button located in the toolbar
6.   Confirm that you want to delete the record. The record will be deleted when you click OK

Print the Vendor List

1.   Log in to the Administration Module
2.   Click on the Contacts button
3.   Click on the Vendors tab
4.   Click on the List sub-tab
5.   Click on the Print icon in the utility toolbar
6.   The Print window will appear. Put a check in the box labeled "Vendor List" and click the Print button
7.   The Report Preview window will appear. Click Print icon to print the list

Rental Car Companies Tab

The Rental Car Companies tab manages the list of rental car companies your shop deals with on a regular basis.

Create/Edit The Rental Car Company List

1.   Log in to the Administration Module
2.   Click on the Contacts button
3.   Click on the Rental Car Companies tab
4.   Click on the List sub-tab
5.   Click on the New icon located on the toolbar. This will automatically take you to the Admin sub-tab
6.   Create a unique contact code for the rental car company. Remember that this code must be unique and cannot be shared with an insurance company or vendor
7.   Fill in the appropriate fields. Remember that if you will be using Summit's automatic notification feature you will need to fill in the email address and fax # (you must enter the fax number exactly as it should be manually dialed on a fax machine).
8.   Click on the Save button in the utility toolbar to save your entries

To delete a record, follow the same procedure followed to delete an insurance company or vendor record. To print the rental car company list, follow the same procedure to print an insurance company or vendor list.

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Contacts Tab

The Contacts tab is a list of all other contacts your shop may want to keep track of. These could be anything from local mechanics to the pizza shop down the street. These contacts, along with the other contacts will be readily available to system users in a system Phone Book (explained later).

Create/Edit A General Contacts List

1.   Log in to the Administration Module
2.   Click on the Contacts button
3.   Click on the Contacts tab
4.   Click on the List sub-tab
5.   Click on the New icon located in the utility toolbar. This will automatically take you to the Admin sub-tab
6.   Fill the appropriate contact information. Note that there is not a unique contact code associated with the Contacts sub-tab. The General Contacts list is for your own reference and does not need a code.
7.   Click on the Save icon on the utility toolbar to save the entries/changes

Follow the same procedures used for the other Contacts lists to delete records and print a General Contacts list.

Employees Button

The Employees button is used to create, edit, and store important employee information. This includes administration data like addresses, phone numbers, and date of hire. It also includes pay types (commission, flat rate, hourly) and pay rates. In addition, the Employees button is where you set up system defaults for specific employees. For example, you can set up a time clock password for each employee (used when each employee logs in to the time clock). You can also assign default labor departments for each technician. You will need to create records of all employees in your shop.

The Employees button is divided in to five separate tabs: Management, Office, Technician, Inactive, and Admin. The first three tabs (Management, Office, Technician) organize your employee records by employee type. These tabs contain lists of each type of employee and include information like employee code, pay type and rate, home phone number, etc. The Admin tab is used to create or edit your employee records.

Create Employee Records

1. Log in to the Administration Module
2. Click on the Employees button
3. Click on the Admin tab and then click the New button.
4. Choose an employee type from the drop down box in the "Type" field. Your choices are Management, Office, and Technician
5. Assign an employee code. This code must be 1-5 letters or numbers long, and must be unique to the employee (i.e. no two employees can have the same code). This code will be used throughout Summit when referring to this employee. This code is not a password, simply a reference number.
6. Fill in the employee's personal information in the fields provided
7. Enter the Mechanic ID # (if applicable; this field can be left blank if your state does not require a Mechanic ID #)
8. Enter the employee's birthday and date of hire (if available) by clicking on the day on the drop-down calendar in that field. Note that a "Happy Birthday" greeting will appear at the TechCentral when the tech logs in, or when the employee logs in to the system.
9. Select the employee's Pay Type (Hourly, Salary, Flat Rate, Commission)
10. Enter the employee's Pay Rate. (Optional for technicians only) Click on the ellipses (the button with the three dots on it located to the right of the "Pay Rate" field. This will bring up the "Pay Rates" window). This window has eight different fields labeled with eight different labor types. Fill in the employee's rates (as applicable) for each field
11. If the employee you are creating a record for is an hourly employee AND you pay overtime, fill in the OT Rate field with the dollar rate of overtime for the employee. For example, if the employee is paid $30 per hour, and they are paid "time-and-a-half" for overtime, you would enter, $45 in the OT Rate field. You will also need to enter the number of regular hours per day for the employee (8 or possibly 10 hours per day). Enter this value in the Limit/Day field
12. Create a Time Clock Password for the employee. A time clock password is only needed if you are using the time clock, and if the employee whose record you are creating will use the time clock. The Time Clock Password is entered in the "TC Password" field and must be a combination of 1-10 NUMBERS (the code MUST be numeric).
13. If the employee you are creating the record for is a technician, select a default labor department for the technician. If the tech is a body man, select "Body", etc. The default department will be used in the time clock, which will be discussed later in this manual
14. Select the Categorize setting for the employee. This information controls who can be selected as an Estimator, CSR, Parts Manager, etc. Any one person who writes estimates, regardless of actual job title or position, needs to be estimator. This option is used for the Auto-Notification functions, which are set in the Business Rules.

15.   If the employee you are creating a record for is part of a team, enter the team name in the field labeled "Team". The team name must be entered EXACTLY as it was entered for the other members of the team. In other words, "red team" and "RED TEAM" are different.

16.   If desired, right click the white box in the upper right area to add a picture of the employee.

17.   Click the Email: link at the right of the Address field to add the employees email address.

18.   After all appropriate information has been entered, click the Save button.

Employee History

Summit can help you track employee evaluation, employee history, etc. by allowing you to enter notes on each employee. To add or edit employee notes:

1.   Log in to the Administration Module

2.   Click on the Employees button

3.   Click on the tab (Management, Office, Technician) pertaining to the employee. If the employee is a manager, click on the Management tab, etc.

4.   Find the employee whose record you would like to edit and highlight it

5.   Click the Notes button

6.   The History for: window will appear. Click the New button and enter the new note directly in the list. Click the Save button to save the note.

Edit an Employee Record

1.   Log in to the Administration Module

2.   Click on the Employees button

3.   Click on the tab (Management, Office, Technician) pertaining to the employee. If the employee is a manager, click on the Management tab, etc.

4.   Find the employee whose record you would like to edit and highlight it.

5.   Click on the Admin tab. This will bring up all the admin information for the employee.

6.   Click on the field/fields you would like to edit and make the necessary changes.

7.   When you have made all changes to the employee's record, click the Save button to save the changes.

IMPORTANT NOTE: Be sure to enter employee names in other parts of the Administration Module EXACTLY as you entered them in the Employees button. If they are not entered identically, the interoffice email, many of the Estimator functions and some of the Business Rules will not work properly.

Inactive Employees

Inactive employees are employees that you want to be maintained in the system, but you no longer want to appear within the system (dropdown menus, reports, etc). This may be useful for extended leaves-of-absence or other circumstances. To convert regular employees to inactive employees:

1.	Log in to the Administration Module
2.	Click on the Employees button
3.	Click the tab associated with the employee you would like to convert to inactive (Management, Office, Technician)
4.	Find and highlight the employee you would like to convert to inactive from the list of employees and click the Admin tab
5.	Change the Type field from the current employee type to Inactive by selecting Inactive from the dropdown menu
6.	Click the Save button located in the utility toolbar to save the change
7.	The employee can now be found in the Inactive tab

Create A Team

A team is a group of individual technicians that work together as a group. Summit allows you to assign RO's to teams, flag labor to teams and track team efficiencies. Setting up teams in Summit can be tricky so be sure to follow the procedure below carefully to avoid problems in the future. The process for creating a team has two parts: first, create an employee that represents that team and second, add real technicians to that team. Here are the details of the process:

1.	Log in to the Administration Module
2.	Click the Employees button
3.	Click the Admin tab
4.	Click the New button located in the utility toolbar. A blank employee form will appear.
5.	You will now create an employee representing the team. This record only needs two things: an employee types and an employee code. The Employee Type must be Technician. Select Technician from the dropdown in the Type field.
6.	The Code field represents the name of the team. This name must be 5 letters/numbers or less, and should be all capital letters. Fill in the Code field with the name of the team and click the Save button to save the record
7.	You will now need to add technicians to the team you just created. To add technicians to the team you just created:
8.	Click the Technician tab and find and highlight one of the technicians on the team you just created.
9.	Click the Admin tab and enter the code used for the team you just created in the Team field (near the bottom of the screen). You must enter the team

name EXACTLY as it appears in the team admin section. After adding the team code to the technician, click the Save button to save the changes
10.   Follow the above procedure for all technicians that need to be added to the team.
11.   Follow steps 4 through 7 to create additional teams.

Production Button

The Production button is where you will specify the names for all your departments, configure them, and establish triggers for specific events in the system. If configured properly, Summit will automatically flag labor as each job is moved through Production. Summit will allow you to automatically flag labor to an individual, and even to a team. Auto flagging will be explained in further detail when we discuss the System Module and using Summit.

Summit will also automatically send notification e-mails to customers, insurance companies, and rental car companies. These e-mails are sent (or not sent) as each vehicle is moved through the system. The Production button allows you to decide if an automatic e-mail is sent, WHOM it's sent to, and WHAT the e-mail will say. In addition, you can configure the system to notify YOU (or whoever is using the system) that an automatic e-mail has been sent.

Departments Tab

You may define up to fourteen departments in your shop. You can name these departments whatever you like, but they need to be entered in the correct order. In other words, the first department needs to be the first department on the list and the last department needs to be the last department on the list.

The following is a list of all columns in the Production button grid, and their function.

Column Name	Function
Department	Describes the department. These departments can be named whatever you want (to a max of 14 departments)
WIP	Work in Process. This column indicates whether of not a department is classified as "WIP" or not
Trigger	Checking this column tells the system to send notification e-mails, flag labor, and dates to post when the vehicle is moved to the department. It also activates the Department Scheduling function.
Update	Selects the system date to be updated when a vehicle enters the department. This date is updated when the vehicle *arrives* in the department
Labor	Indicates the type of labor for the department (Body, Frame,

	Mechanical, Glass, Detail, Structural, Electrical, Refinish, and <N/A>)
%	The percentage of labor that will automatically be flagged when the vehicle leaves the department
Max Hrs	Max hours to schedule for that department for an individual day. This only gets used if you use the Department Scheduling. (See Business Rule 79)
S %	This is used for Department Scheduling and what percentage of the job is to be applied to the specific department. It then takes the labor and applies it over "X" number of days. (See Business Rule 79)
Admin Days	This adds the specified number of days to a RO's Department Scheduling. This only gets used if you use the Department Scheduling. (See Business Rule 79)
C	Stands for "Customer". This column lets you decide if you will send automatic notification e-mails to customers
R	Stands for "Rental Car Companies". This column lets you decide if you will send automatic notification e-mails to rental car companies
I	Stands for "Insurance Company". This column lets you decide if you will send automatic notification e-mails to insurance companies
Confirm	If a check mark is in this column, Summit will pop up a window in the system confirming that you want to send a notification e-mail
Customer Msg.	The actual message that will be sent to customers
Rental Msg.	The actual message that will be sent to rental car companies
Ins. Msg.	The actual message that will be sent to insurance companies

Set Up Production Departments

1. Log in to the Administration Module
2. Click on the Production button
3. Highlight the first field in the Departments column and type the name of the department. It is important to enter your departments in correct chronological order.
4. Click Save to save the entry
5. If the department is classified as "WIP" (Work in Process), place a check mark in the box in WIP column
6. Follow steps 3-6 for each department in your shop

The departments can be colored for use in the System module. To set the colors: Right click on the department line you wish to set. Select Set Department Background Color. Select the desired color and click ok. Next, right click the same department and click Select Department Font Color. Select the desired color and click ok.
Note: This is a required function. Each department needs a color set for both background and font for it to work. If no color-coding is desired choose white for the background and black for the font.

ADMINISTRATION MODULE

Set Up Automatic Labor Flagging

1.   Log in to the Administration Module
2.   Click on the Production button
3.   For each department you want to automatically flag labor, put a check in the box in the "Trigger" column. This will tell the system to automatically flag the labor when the vehicle leaves the department
4.   For each department you want to auto-flag, choose a labor type (Body, Frame, Mechanical, Glass, Detail, Structural, Electrical, or Refinish) from the "Labor" column
5.   You must now decide how much labor will be automatically flagged for each department. For example, if you normally do about 10% of total body labor in a teardown department you would enter "10" into the "%" column. This means that if 50 total body hours are assigned, 5 hours will be flagged when the vehicle leaves "Tear Down". Note that the system will NOT automatically overflag. In other words, if you tell the system to auto-flag 25% of body labor when leaving Tear Down, 50% when leaving Body, and 35% when leaving Assembly (for a total of 110%), the system will only flag 25% when leaving Assembly (this applies to AUTO-FLAGGING ONLY, it is possible to over flag labor MANUALLY). Enter the percent to be flagged for each department in the "%" column.
6.   Click the Save button in the utility toolbar to save the entries

Set up Department Scheduling

1.   Log in to the Administration Module
2.   Click on the Production button
3.   Enter a labor type for the appropriate departments.
4.   Check the Trigger column for each department that has a labor type in the Labor column.
5.   Select Max Hrs for the department you wish to set and enter the maximum hours per day.
6.   Select S % for the department you wish to set and enter the percentage of the labor you want to give that department. Example: The RO has 50 hours of body labor and you enter 20% for a Body department. Summit will apply 10 hours to that department.
7.   Select the Admin Days for the department you wish to set and enter a 1 or higher number. If a department does not need an Admin Day leave this field BLANK. Admin Days are for adding days to you ROs schedule. Example: You have a Sublet department and want to add a day for all ROs with Sublet.

The Department Scheduling can be a difficult feature setup. For assistance please call Summit Support at 208-947-1738 x10.

Set Up Automatic E-Mail Status Notification

To setup the Automatic E-Mail Status Notification to Customers, Insurance Companies and Rental Car Companies perform the following steps:

1.   Log in to the Administration Module
2.   Click on the Production button
3.   Put a check in the "Trigger" column (if there is already a check there, leave it) for the departments you would like Summit to send e-mails for. Remember that the e-mail is sent when the vehicle arrives in the department.
4.   Now you must decide WHO Summit sends the e-mails to. The three small columns labeled "C", "I" and "R" represent the three different groups that Summit will send e-mails to: Customers, Insurance companies, and Rental car companies. Put a check in the columns that apply. For example, if you wanted Summit to send a message to the customer that his/her vehicle had reached "Assembly" you would put a check mark in the "C" column for the "Assembly" department. You can send messages to one, two or all three parties for each department
5.   Now you need to define what the message will say. This is done in the three columns labeled "Customer Msg", "Ins. Msg" and "Rental Msg". These messages can be no more then 120 characters long. Highlight the line you would like to edit and then type in the desired message
6.   Click on Save to save the message
7.   The last is to decide whether or not you want Summit to confirm that you are sending the message while you are working in the system. To do this put a check mark in the "confirm" column. If the box is checked, a window will pop up in the System Module when you move the vehicle to that department
8.   Follow steps 3-7 for all departments you would like to send auto-notify messages for (including non-WIP departments)

Department Checklist Items

The Department Checklist Items are required task that must be completed before a vehicle can be moved to the next production department.

1.   Log in to the Administration Module
2.   Click on the Production button
3.   Click in the Department Checklist Items field
4.   Click on New and type in the description of the checklist item
5.   Click Save to save the current entry

Job Classifications Tab

The Job Classifications Tab is used to define up to ten different categories. You have the option of basing these categories on the hourly amounts that can be entered in the Bdy Limit and Ref Limit columns. Job Classification can be used based on the labor hours on a job, but it does not need to be. Your classifications can consist of descriptions only, if you want to classify them by location, for example. Summit's classification system is very flexible. To set up classifications:

1. Log in to the Administration Module
2. Click the Production Button
3. Click the Job Classifications Tab
4. Highlight Description column in the first line. Enter the description of the first job classification. Fill in any of the other columns (Bdy Limit, Ref Limit, etc.) that you would like.
5. Follow the same procedure for other classifications. Your changes will be automatically saved as you make them, so there is no need to click the save button.

The Job Classification can be colored for use in the System module. To set the colors: right click on the job class description line you wish to set. Select Set Department Background Color. Select the desired color and click ok. Next, right click the same job class description and click Select Department Font Color. Select the desired color and click ok.

Note: This is a required function. Each Job Classification needs a color set for both background and font for it to work. If no color-coding is desired, choose white for the background and black for the font.

Security Button

An important function of Summit is its security and permission features. Summit can be configured to isolate users from parts of the system that they don't use. In fact, if a Summit user does not have access to a portion of Summit, that portion will not even appear on the screen. For example, if your parts manager does not have access to the Line Items button (a menu button in the System Module that will be explained later) he will not even SEE the Line Items button on his screen. This will make more sense as you become more familiar with the System module.

The Security button is also where you will set up user names and passwords for the other Summit users. Note that anyone with access to the Administration Module can change these user names and codes.

Create A New Summit User

1. Log in to the Administration Module
2. Click on the Security button
3. The default tab is the User's List Tab. Click on the New button located in the utility toolbar. This will automatically take you to the Admin tab
4. Fill in the new user's full name in the "Full Name" field. Enter the name exactly how it was entered in the Employees button
5. Create a User Name for the employee. This user name is what the employee will use to log in to Summit. A user name will need to be created for ALL Summit users. The user name must be 1-10 letters or numbers long.
6. Create a Password for the new user. This password will be used to log in to the system and must consist of 1-10 letters or numbers. A Password must be created for ALL Summit users

Assign System User Access Rights

1. Log in to the Administration Module
2. Click on the Security button
3. In the Users List, click on the user you would like to assign rights to
4. Click on the Admin tab.
5. You will need to assign which modules the new user can access. Put a check next to the modules that you would like the user to have rights to
6. You also need to decide whether or not the user can add contacts (Ins. Co, Vendors, Rental Car Co.) Put a checkmark in the appropriate boxes.
7. When you initially assign rights, the check boxes next to the module names will have a check mark in them, but appear grayed out. This means they have not been checked or unchecked. You will need to uncheck the boxes, and then check the ones you want to give the employee rights to.
8. The drop-down menus below the module choices refer to buttons and views in the System. Most of these menus have three options: Read/Write, Read Only and No Access. You will need to assign one of these options for all ten System buttons/views. If you assign Read/Write access, the employee can both see and change data in that portion of the program: For example, if you give Read/Write access in the Job Costs button in the System, then the System User could see the data and add or delete costs. Read Only access is exactly as it sounds: the user can access the portion of the system, but cannot add, delete or edit information. The No Access option will remove the button/view from the screen for that user. In other words, if you assign No Access to the Parts button, then the Parts button will not appear when the user logs in to the System.
9. Click on Save to save the entry

Set Up the Default Open RO View

1. Log in to the Administration Module
2. Click on the Security button
3. The Security button opens with the Users List tab selected. Highlight the user you would like to set the default Open RO view for and click the Admin tab
4. The Admin tab will open with the user's information in the fields. Click on the drop-down menu labeled "Open RO View" and select the default Open RO view (RO List, Production, Parts, Job Costs, A/R)
5. Click the Save button in the utility toolbar to save the change

Edit Summit User Access Rights

1. Log in to the Administration Module
2. Click on the Security button
3. Highlight the user whose record you would like to edit in the Users List tab and click the Admin tab
4. The Admin tab will open with the user's information in the fields
5. Edit the fields you need to edit
6. Click the Save button to save your changes

NOTE: If you are setting up a TechCentral user, be sure that "TechCentral" is the ONLY Module the TC user has access to (uncheck all Modules except "TechCentral"). Also ensure that ALL System options are set to Read/Write.

Dashboard Settings

This is where your setup which Dashboard view appears. The menu selection is sorted by job title. The job title determines what daily job responsibilities show. All other screens are basically the same except for estimators. The graphs and charts will be specific to the individual estimator. All other job types show an overall view in graphs and charts.

SOP Button

Create Standard Operating Procedures

1.   Log in to the Administration Module
2.   Click on SOP
3.   Click on the Standard Operating Procedures tab
4.   If you are adding a new SOP, click the Add a New SOP button located to the right of the dropdown menu at the top of the window (looks like a large plus sign). Enter a description of the SOP in the window that appears and click OK
5.   To edit current, or newly created, SOP's, select the SOP from the dropdown menu located near the top left corner of the Administration window
6.   To edit details, just highlight the line and make the changes. To create a new line, select the SOP from the drop down and click the New Button.
7.   Enter the SOP detail/steps in the line that was created when you clicked New in the utility toolbar
8.   Repeat steps 4-7 for each SOP you want to create/edit
9.   When you are finished, click Save to save the changes

Create/Edit Daily Job Responsibilities

1.   Log in to the Administration Module
2.   Click on the SOP button
3.   Click on the Daily Job Responsibilities tab
4.   Select a job title from the dropdown menu located in the upper left portion of the Administration window.
5.   To add a new job responsibility, click New. Highlight the line that is created and add the description of the responsibility along with a priority rating.
6.   To edit an existing responsibility, double-click the line you want to edit and make the change
7.   Follow this procedure for all changes/additions you want to make
8.   Click Save to save the changes

Other Button

The Other button is much like the rest of the Administration Module. Editing and creating new items in this button is just like editing and creating items in the other buttons and tabs in the Administration Module. The Other button contains six tabs: Parts Database, Estimate Sources, Referral Sources, Presets, Forms/Letters, and TechLinks.

Parts Database Tab

This parts database is used for estimates written in Summit, or manually entered line items. These are items you keep in stock, use often, etc. They can be added to an estimate or RO by following the procedures in the System Module portion of this manual. Add items to this database in the same manner you added items to other lists in the Administration Module.

Estimate Sources Tab

Estimate sources provide a way to track marketing return-on-investment. The Estimate Sources tab provides a description of the source, as well as a column for the allocated annual budget for the item. These items can include Yellow Pages ads, TV ads, word-of-mouth, etc. These sources are used in a marketing report and can be selected from a drop down menu when an RO is created.

Referral Sources Tab

This tab contains information that can also be selected when an RO is created. This will allow you to track who the major referrers are for your shop. These most likely will include insurance agents and external estimators.

Presets Tab

The Presets Tab lets you specify reasons why certain things happen in relation to a specific RO. System users will be able to choose these items from a menu that appears when these certain things happen. Summit provides presets for: Target Date Change, Credit Returns, Warning Flags, Technician Messages, (this will be discussed in the TechCentral Module portion of this manual) Line Notes, Lost Business, Voided Job, PO Notes, and Non-RO Items.

Forms/Letters Tab

This tab lets you edit certain forms in Summit. These forms include: Estimate Follow-up, Estimate Follow-up #2, Thank You Letter, Vehicle Warranty, Repair Authorization, Estimate Disclaimer, Repair Order Disclaimer, Supplement Disclaimer, Invoice Disclaimer, Quality Control Checklist, and six Custom Forms. For help editing these forms Contact Summit Support Technical Support @ (208) 947-1738 ext. 10.

TechLinks Tab

The TechLinks tab sets up websites technicians will be allowed to access from the TechCentral. This prevents techs from roaming free on the internet, while allowing them to access valuable web-based resources. To add links to the list of allowed websites, simply click the New button and enter a description and fully qualified URL (http://www.ford.com, for example; 'http://' must be included) and click the save button to add the link.

System Module

All production management, scheduling, parts management, and job costing is done from the System Module. A clear understanding of the System Module and its procedures will increase shop efficiency and will increase the return from your Summit investment.

Using the System Module

This section explains general operations in the system. It will describe how to navigate through the system and gives a general description of how to use system data. This will make using the system easier and faster, as well as allowing you to focus on using Summit instead of worrying about how to move through the system.

System Module Layout

The System Module is designed to make finding and using management data simple, fast, and efficient. A single-screen layout makes it easy and quick to move from one part of the System Module to another. All System Module screens have similar general features. Customer and job information for the currently selected RO will always be found along the top of System Module screens. This top portion of the screen has functionality. For example, you can right-click on the customer name to include it in the contacts list that is maintained in the Administration Module.

Below the customer information at the top of each screen are nine buttons (Jobs, Admin, Line Items, Parts, Job Costs, Imaging, Schedule, Reports, Messages), the last three highlighted blue. We will talk about these buttons individually. A utility toolbar containing buttons with labeled icons will always be found just below these nine buttons. This toolbar will help you perform important system tasks related to the section of the program you have selected. The information found in the middle of the screen is a list of RO's or estimates in the system, or a list of information for the currently selected RO.

The Information Bar

The information bar is located along the top of the System Module screen. It contains the selected customers record information. Some of the data located here has special functions. Below is a list of functions:

1. Est # or Unit #: Right mouse click to set the date range of Assignments/Estimates listed on the screen. This function uses the Estimate Created date to select the records to show.
2. RO #: Right mouse click to manually assign RO#. Note you must ensure that the RO number is not being used by any other RO. This includes Open/Closed ROs, Voided, and Lost Business.
3. Est Nm: Right mouse click to filter the list of jobs based on Current logged in user's name, Estimator's name, and CSR's name. Filtering will remove all non applicable jobs from view
4. Customers Name: Left click to send customer information to accounting (i.e. QuickBooks, BusinessWorks, etc.). Right mouse clicks to add Customer's name to Summit's Contact list.
5. Curr Tech: Right mouse click to print a Job Worksheet, filter to show only the Current Tech's ROs, filter to show any tech's RO's, and TechCentral Status.
6. Reschedule: Click this button located just left of "Sch In:" to reschedule the selected RO.
7. Time Clock Status: Click to view the overall status of hourly labor for the selected RO. (This button is located next to "Sch Out:")
8. Sch In:/Sch Out: Click here to change the scheduled in or scheduled out date.
9. Status: Right click to view import info or to change the import link.
10. Warning: Right click to add or remove a warning flag.
11. Blue button with white question mark: Left click this to search Summit Support's Knowledge Base.

QuickAccess Buttons

The QuickAccess buttons, located in the upper right corner of all System Module screens, were designed to make useful system information easy to access. There are nine QuickAccess buttons: Email/Interoffice, Dashboard, Phonebook, Quick Contact, IOU Items, Schedule an Appointment, Compliance Task List, Job History/Notes, and Lock Screen. These buttons do not have text labels, but if you hover your mouse pointer over one of the buttons, a description of the button will appear on the screen

Each of these buttons gives you access to important system information with a single mouse click. Some of these buttons even allow you to do important RO-related tasks, like checking compliance tasks and tracking IOU items. Each of these buttons will be discussed in its own section.

Email/InterOffice Mail Button

Summit's "Email/InterOffice Mail" feature allows users to skip several steps in the messaging process. This feature is accessed by clicking on the envelope located in the upper right corner of the System Module window. The envelope is located next to the Dashboard button. The "Quick Message" feature takes a user directly to the Compose window as though the user was in the Messages Button. It also adds a subject related to the currently selected RO. To use this feature:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Select the RO for which you would like to send a related message
5.   Click the envelope located next to the Dashboard button in System Module window
6.   The Message window will appear. Follow the same procedure used to compose a message in the Messages button and click Save to send the message

Dashboard Button

Summit's exclusive "Dashboard" feature provides personalized information for every Summit user. This information includes daily job responsibilities, appointments, and vehicle arrival and delivery schedule. It also includes the Inbox for the System user. Finally, a personalized contact list is available, which can include anything from relative's phone numbers to the address of the pizza joint down the street.

View the Dashboard

The Dashboard can be viewed from anywhere in the System Module. To view the Dashboard:

1.   Log in to the System Module
2.   From anywhere in the System Module, click the Dashboard button located in the upper right corner of the System window
3.   The Dashboard window will then appear

There are ten tabs in the Dashboard window: Daily Responsibilities, Procedures, Appointments, In Box, Vehicles Arriving, Delivery Schedule, My Contacts, My Statistics, Outstanding IOUs and My Internet Places.

Clock In and Out From the Dashboard

The Dashboard allows hourly employees to clock in directly from the System Module instead of clocking in using the TechCentral. To use this feature:

1. Log in to the System Module
2. From anywhere in the System Module, click the Dashboard button located in the upper right corner of the System window
3. The Dashboard window will then appear
4. In the upper right corner of the Dashboard there is a clock with a Clock In/Out button beneath it. To clock in or out, simply click the Clock In/Out button.
5. The Quick Clock In window will appear. This will have several clocking options (Start of Day, Lunch, etc.). Select the most appropriate option and click Save.
6. You will then be clocked in or out of the system, depending on your selection.

Today's Overview

This view shows general information and is the default view when the Dashboard opens.

Appointments

Summit's Dashboard is designed to help system users manage all aspects of their work, including appointments. To view appointments from anywhere in the System window:

1. Log in to the System Module
2. From anywhere in the System Module, click the Dashboard button located in the upper right corner of the System window
3. The Dashboard window will appear
4. Click the Appointments button. The list of all appointments for the user will appear

In Box

The In Box tab is essentially the Inbox tab from the Messages button. You cannot, however, edit any information in the Dashboard In Box. This is for reference only. To view the Dashboard In Box, do the following:

1.   Log in to the System Module
2.   From anywhere in the System Module, click the Dashboard button located in the upper right corner of the System window
3.   The Dashboard window will appear
4.   Click the In Box tab. All messages in the system users' inbox will appear in the window

Vehicles Arriving

The Vehicles Arriving tab displays all vehicles scheduled to arrive that day. This helps system users to better manage time and efficiency from anywhere in the System Module. Viewing the list of vehicles scheduled to arrive for the day is as easy as:

1.   Log in to the System Module
2.   From anywhere in the System Module, click the Dashboard button located in the upper right corner of the System window
3.   The Dashboard window will appear
4.   Click the Vehicles Arriving tab. The list of all vehicles scheduled to arrive for the day will appear in the window

Deliveries

Summit's Dashboard also includes a list of all vehicles scheduled for delivery to the day. This list is closely tied to the information found in the Vehicles Arriving tab. They, along with the Appointments tab, are intended to give a general picture of the daily schedule in your shop. Here's how to view the delivery schedule for the day:

1.   Log in the System Module
2.   From anywhere in the System Module, click the Dashboard button located in the upper right corner of the System window
3.   The Dashboard window will appear
4.   Click the Delivery Schedule tab to view the list of vehicles scheduled for delivery for the day

My Contacts Tab

This is a personal contact list accessible only to the specific person logged into the system. This can contain anything from the users' physician to his/her mother-in-law. Contacts can be added, deleted or edited, and even printed. To do this:

1.   Log in to the System Module
2.   From anywhere in the System Module, click the Dashboard button located in the upper right corner of the System window
3.   The Dashboard window will appear
4.   Click the My Contacts tab to view your contacts. Use the buttons in the utility toolbar to add, delete, edit or print your contact list

My Statistics

My Statistics shows several different items. From the dropdown you can get Conversion Ratio, Top Insurance Companies and Estimator Gross Profit. Depending on your Security settings and Employee settings in Administration Module you can get varied results. Examples: If an Estimator logs in, the Dashboard would show the estimators personal statistics. If the General Manager logs in, the Dashboard would show an overall set of statistics for all estimators. These statistics can be filtered by a selected date range.

Daily Responsibilities

This tab contains a list of the daily job responsibilities for the system user. These items can be checked off as they are completed. To view and check off daily responsibilities:

1.   Log in to the System Module
2.   From anywhere in the System Module, click the Dashboard button located in the upper right corner of the System window
3.   The Dashboard window will then appear. Click the Daily Responsibilities tab
4.   The list of the system user's daily job responsibilities will appear. To check off an item in the list, put a check mark in the box next to the item you would like to check off

Shop Procedures

The Procedures tab is a resource for all system users, showing standard operating procedures for your shop. These are broken down into several different categorizes, and are defined in the Administration Module. Here's how to view the procedures list:

1.   Log in to the System Module
2.   From anywhere in the System Module, click the Dashboard button located in the upper right corner of the System window
3.   Click the Procedures tab
4.   Choose a procedure category from the dropdown menu located below the tabs in the Dashboard window
5.   The list of procedures for that category will then appear

Outstanding IOU's

Estimators can view all outstanding IOU's on their estimates from the Outstanding IOU's Tab.

My Internet Places

My Internet Places is a mini web browser. You can view only a few selected websites. To set these web sites log into the Administration Module Other button and TechLinks and add or subtract from the list.

Phonebook Button

The Phonebook button lets you access contact information (including phone numbers and mailing addresses) of all insurance companies, rental car companies, vendors and contacts in the system. The Phonebook lists information entered in the Administration Module. This feature allows you to easily find contact information for RO-related parties (like vendors) without leaving the screen you are in. To use the Phonebook:

1.   Log in to the System Module
2.   No matter where you are in the System Module, click the Phonebook button located in the upper right corner of the System window. The Phonebook gives non-RO-related information, so it doesn't matter where you are in the System Module, since the information you see is not directly linked to the selected RO

3.   The Phonebook window will appear. Click the tab at the top of the window that corresponds with the type of information you would like to use (insurance company, rental car company, etc.)

4.   Scroll through the information using the navigation buttons located in the utility toolbar of the Phonebook window, OR use the direction keys on your keyboard to scroll through the list

5.   Note that clicking the column header for any column will sort the grid by that column

6.   When you are ready to close the Phonebook window, click the "X" in the upper right corner of the window

Adding Contacts on the Fly in the Phonebook

You can add contacts (i.e. insurance co., vendors, rental car co.) on the fly from the phonebook. This requires the correct access rights for the user who is logged in to the system (see Security section of the Administration Module). To add a contact:

1.   Log in to the System Module
2.   Click the Phonebook button
3.   Click the appropriate tab for the type of contact you would like to add
4.   Click the New button.
5.   A new window will appear. Enter the appropriate information for the type of contact you are entering. Note that it is important to enter discount % for vendors and Hrs./Day for insurance companies.
6.   Click the Save button to save the new contact

Quick Contact Button

The Quick Contact button gives you access to important customer, insurance company and rental car company contact information like phone numbers and e-mail addresses for the selected RO. The procedure below will help you use the Quick Contact button:

1.   Log in the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Find and highlight the RO for which you would like to view quick contact information
5.   Click the Quick Contact button located in the upper right corner of the System Module window
6.   The Quick Contact window will appear, showing information for the selected RO. When you are ready to close the Quick Contact window, click OK

View IOU Items Button

The View IOU Items button, which looks like a "thought" bubble with an "i" in it, allows you to view, create, edit, delete or print IOU items for the selected RO. The following procedures will show you how to use these IOU features.

View IOU Items for an RO

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Find and highlight the RO for which you would like to view IOU items from the list of RO's in the center of the System window
5.   Click the View IOU Items button located in the upper right corner or the System window (looks like a "thought" bubble with an "i" in it)
6.   The IOU window will appear. The list of all IOU items for the selected RO will be in the center of the IOU window

Create an IOU Item for the Selected RO

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab (OR Closed RO's tab if the job has been closed)
4.   Find and highlight the RO for which you would like to create IOU items from the list of RO's in the center of the System window

5. Click the View IOU Items button located in the upper right corner or the System window (looks like a "thought" bubble with an "i" in it)
6. The IOU window will appear. The list of all IOU items for the selected RO will be in the center of the IOU window
7. Click the Create New IOU Item button located in the utility toolbar of the IOU window (looks like a blank sheet of paper)
8. A new line will be created in the list of IOU items. Click on the "Description" field for the new item and enter a description of the item owed
9. Click the check mark located in the utility toolbar of the IOU window to save the new item

Delete an IOU Item

1. Log in to the System Module
2. Click the Jobs button
3. Click the Open RO's tab (OR Closed RO's tab if the job has been closed)
4. Find and highlight the RO for which you would like to delete IOU items from the list of RO's in the center of the System window
5. Click the View IOU Items button located in the upper right corner or the System window (looks like a "thought" bubble with an "i" in it)
6. The IOU window will appear. The list of all IOU items for the selected RO will be in the center of the IOU window
7. Find and highlight the IOU item you would like to delete
8. Click the Delete Current Record button located in the utility toolbar of the IOU window
9. A confirmation window will appear. Click OK to delete the IOU item
10. The selected item will then be deleted

Print the List of IOU Items for the Selected RO

1. Log in to the System Module
2. Click the Jobs button
3. Click the Open RO's tab (OR Closed RO's tab if the job has been closed)
4. Find and highlight the RO for which you would like to print IOU items from the list of RO's in the center of the System window
5. Click the View IOU Items button located in the upper right corner or the System window (looks like a "thought" bubble with an "i" in it)
6. The IOU window will appear. The list of all IOU items for the selected RO will be in the center of the IOU window
7. Click the Print button located in the utility toolbar of the IOU window (looks like a printer)

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8.   The Print window will appear. Put a checkmark in the checkbox next to the "IOU Report" field and click the Print button

9.   The Report Preview window will appear. Verify that you want to print the report and click the printer icon located in the upper left corner of the window to print the report

Mark IOU Items as Ordered, Received and Installed

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab (OR Closed RO's tab if the job has been closed)
4.   Find and highlight the RO for which you would like to order, receive or install IOU items from the list of RO's in the center of the System window
5.   Click the View IOU Items button located in the upper right corner or the System window (looks like a "thought" bubble with an "i" in it)
6.   The IOU window will appear. The list of all IOU items for the selected RO will be in the center of the IOU window
7.   Find and highlight the IOU item you would like to mark as received or installed
8.   Put a checkmark in the "Ordered" field if you have ordered the item, a checkmark in the "Received" field if you have received the item, a checkmark in the "Installed" field if you have installed the item
9.   Click the checkmark in the utility toolbar in the IOU window to save the changes to the IOU items

Schedule an Appointment Button

Summit users can schedule an appointment from anywhere in the System Module with a single mouse click. This can be done with the Schedule an Appointment button, located with the QuickAccess buttons in the upper left corner of the System window. This button allows you to schedule appointments for the current system user, or for the estimator.

Schedule an Appointment

To schedule an appointment using the Schedule an Appointment button:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab

4.   Find and highlight the RO for which you would like to schedule an appointment from the list that appears in the center of the System window

5.   Click the Schedule an Appointment button located in the upper right corner of the System window (looks like a calendar)

6.   The Schedule an Appointment window will appear. Fill in the description of the appointment in the "To Do" field, select the day of the appointment by clicking on the day in the calendar to the left and fill in the time you would like to have the appointment, check the boxes below if you want the record of the appointment to include the RO number and the customer phone number and select whether you would like to schedule the appointment for the estimator or the current system user

7.   When you are ready to schedule the appointment, click Save

8.   The appointment will then be scheduled (note that the appointment will appear in the Appointments tab in the Dashboard of the person the appointment is scheduled for; the appointment can also be seen in the Appointments tab in the Schedule button

Compliance Task List Button

Most insurance companies have special requirements and tasks for DRP shops. These tasks can be easily tracked and managed from the Compliance Task List button. This button will allow you to view all tasks for the selected RO, create new tasks, and check off tasks as they are completed. Remember that Summit can be configured to create these tasks when an RO is created (see Administration Module, Company button, Contacts tab).

View the Compliance Task List

To view the Compliance Task List, do the following:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Find and highlight the RO you would like to work with from the RO list in the center of the screen
5.   Click the Compliance Task List located in the upper right hand corner of the window
6.   The Required Tasks window will appear. If there are no required tasks for the selected RO, the list will appear blank

Add a New Task to the Compliance Task List

You can manually create tasks in the Compliance Task List window, in addition to those created by when the RO is created. Here's how to add a new task:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Find and highlight the RO you would like to work with from the RO list in the center of the screen
5.   Click the Compliance Task List located in the upper right hand corner of the window
6.   The Required Tasks window will appear. Click the Add New Task button located in the Required Tasks window's utility toolbar
7.   A new line will be added in the list. Enter the task description, date, etc. for the new task.
8.   After you have entered the information for the new task, click the Save button, located in the utility toolbar of the Required Tasks window to save the new task

Delete a Required Task

Compliance tasks can also be deleted. Follow this procedure to delete a required task for the selected RO:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Find and highlight the RO for which you would like to delete a required task from the list in the center of the system window
5.   Click the Compliance Task List button located in the upper right hand corner of the System window
6.   The Required Tasks window will appear. Find and highlight the task you would like to delete from the list in the center of the Required Tasks window
7.   Click the Delete Current Record button located in the utility toolbar of the Required Tasks window
8.   A confirmation window will appear. Click OK to delete the task, or click Cancel to keep the task
9.   When you click OK, the task will be deleted

Job History/Notes Button

The Job History/Notes button is a useful tool designed to track events for each RO. When action is taken for the selected RO (converted to RO, parts ordered, closed, etc), a record of that action is recorded in the Job History/Notes button. This allows system users to review RO-related events, ensure action is taken, and keep track of who is doing what with regards to the RO.

This button also includes expanded job notes, allowing you to write extended notes for in-depth clarification of specific items. This feature comes with a date/time stamp. Notes can also be marked public or private, meaning you can "hide" certain job notes from other system users. If you mark a job note private, other Summit users will not be able to see the note. Note that this does NOT apply to job history items.

The System tab is used for tracking system changes. This includes deleted items, repair order synchronization and other system changes.

View Job History/Notes

The job history and notes for the selected RO can be viewed from anywhere in the System Module. To view the history and notes for the selected RO:

1.	Log in to the System Module
2.	Click the Jobs button
3.	Click the Open RO's tab
4.	Find and highlight the RO for which you would like to view job history and notes
5.	Click the Job History/Notes button located in the upper right corner of the System Module window
6.	The Job History/Notes window will appear. The list of all job history items and job notes will appear in the center of the window

Add a New Note or Extended Note to the Selected RO

To add a new note or extended note for the selected job:

1.	Log in to the System Module
2.	Click the Jobs button
3.	Click the Open RO's tab
4.	Find and highlight the RO for which you would like to add a new job note or extended note

5.   Click the Job History/Notes button located in the upper right corner of the System Module window

6.   The Job History/Notes window will appear. If you are adding an extended note, skip to step 8. Click the Add button located in the utility toolbar of the Job History/Notes window

7.   A new line will appear in the list of history items and notes in the center of the Job History/Notes window. Fill in the note information by clicking on each field in the new line and typing in the information and click the Save button to save the new line

8.   To add an extended note to the item, highlight the job history item or the note you want to add the extended note to and click the Extended tab in the Job History/Notes window. Type in the desired note and click the Save button of the Job History/Notes window to save the note. Note that you can add a date/time stamp to the note by clicking the Date\Time Stamp New Note button located in the utility toolbar of the Job History/Notes window (looks like a desk calendar page)

9.   The new note and extended note will be added. If you are adding more than one standard note at a time, you may press the down arrow when you are at the bottom of the list to add another line to then list. You can then follow the instructions above to add the note.

Note: Summit will automatically save when you exit Job History/Notes.

Mark a Note Public/Private

As stated earlier, job notes added manually by system users can be declared public or private. If they are declared private, only the system users that created the note will be able to see the note. To change a note from public to private:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Find and highlight the RO that has the note you want to mark public/private
5.   Click the Job History/Notes button located in the upper right corner of the System Module window
6.   The Job History/Notes window will appear. Find and highlight the note you would like to make public or private. NOTE that you cannot change the status of automatically entered job history items
7.   To mark the selected note public, put a checkmark in the checkbox labeled "Public" for the item. To mark a note private, remove the checkmark from the "Public" field for the item. **Note:** You will be asked for the Admin password

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8.   Click the Save icon located in the utility toolbar of the Job History/Notes window to save the change to the note

Print a Job History Report

To print a job history report:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Find and highlight the RO for which you would like to print a job history report
5.   Click the Job History/Notes button located in the upper right hand corner of the System Module window
6.   Click the Print button located in the utility toolbar of the Job History/Notes window (looks like a printer)
7.   The Print window will then appear. Check the "Job History" report and click the Print button located in the Print window
8.   The Reports Preview window will appear. Verify that you want to print the selected report and click the Print icon located in the upper left corner of the Reports

Lock Screen Button

The Lock Screen button allows you to lock the screen. This is useful if you are looking at private or sensitive system data and you need to step away from the computer, but don't want to log out of the system. NOTE that this feature is also available in the Administration Module. To lock the System Module screen:

1.   Log in to the System Module
2.   Click the Lock Screen button located in the upper right corner of the System window (looks like a key)
3.   The screen will then be grayed out
4.   To unlock the screen, enter your LOGIN password in the small window that appears in the middle of the system window

List Sorting

Sorting can be a useful feature in any of the lists in Summit's System Module. To sort the list by specific data simply click the column header you would like to sort by. There is one exception to this rule: clicking on the Job Class column header will open a new popup window that will allow you to sort or filter by any of your designated job classes. Remember that you must select (All) if you want to view all jobs (this only applies to Filtering). You can sort in reverse order by clicking the blue arrow to the left of the column headers. The direction of the blue arrow dictates the sort direction for all columns. Summit also has an Advanced Filter. To use this feature, right click on any RO and select Advanced Filter from the menu. You will then be prompted for the Admin password. After you enter the password you can then filter/search almost any available field.

Summit's Knowledge Base

Summit's Knowledge Base is a web based help file. In the Knowledge Base you will find frequently asked questions, how do I instructions, and help on error messages. Click the blue circle with the white question mark in the upper right corner to access the Summit Knowledge Base.

System Module Buttons

The buttons at the top of every System Module screen below the customer and job information are, from left to right: Jobs, Admin, Line Items, Parts, Job Costs, Imaging, Schedule, Reports, and Messaging. The first button (Jobs) is where you will find the list of estimates and assignments that have been imported into the system, the list of open and closed RO's in the system, the list of any jobs that have been voided, and lost business. Note that when you select an entry in any of these lists, the customer and job information is displayed at the top of the screen.

The next five buttons (Admin through Imaging) allow you to get to specific information for the entry you selected from the list in the Jobs button. For example, if you highlight an RO in the Open RO List in the Jobs button, and you want to order parts for that RO click on the Parts button. In the Parts button you will find the list of parts (if any) for the RO you selected in the Jobs button. Another example is, if you wanted to view the line items for an RO. From Jobs button select the Estimate or RO for which you want to see the line items and click the Line Items button. The list of line items for the RO you selected will then appear.

The last three buttons (Schedule, Reports, Messages) DO NOT follow this pattern and are not related directly with the selected RO. Instead, they deal with System Module functions not tied with a specific RO. The button text is a different color to set them apart from the other six buttons. The functions they perform will be discussed in a later portion of this manual.

Jobs Button

As stated previously, the Jobs button contains system information organized in several different lists. Summit separates these lists with tabs. Tabs are used throughout the System Module. Tabs are located directly below the System buttons. There are six tabs in the Jobs button: Assignments, Estimates, Open RO's, Closed RO's, Voided, and Lost Business. They represent the potential stages for all jobs that come in to your shop.

Assignments Tab

The Assignments tab lists all assignments that have either been created in the system or imported from an estimating system. Assignments can be converted to Open ROs. Unless Business Rule 35 is checked the Line Items button cannot be accessed.

Create a New Assignment

1. Log in to the System Module
2. Click the Jobs button
3. Click the Assignments tab
4. Click the New button located in the utility toolbar (looks like a blank sheet of paper)
5. The Create New Assignment window will appear. Fill in the necessary information (i.e. Assignment Date, Claim #, etc.) and click Next.
6. Enter the necessary information, double-check that all entries are correct, and click Finish, and then Close.
7. Fill in the Admin data and click Save
8. The new assignment will appear at the top of the list in the Assignments tab.

Import a New Assignment

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click Assignments tab
4.   Click the Import button located in the utility toolbar (looks like a sheet of paper with a green arrow on it)
5.   The Import window will appear. Select the estimating system used to create the assignment from the options found at the top of the window
6.   All estimates and assignments available to be imported for the chosen estimating system will appear. Find and highlight the assignment you want to import from the list.
7.   Choose to import the information as an assignment by selecting "Assignment" from the options at the bottom left of the import screen
8.   When you are ready to import the assignment, click the Import button at the top left corner of the screen
9.   The Import Preview window will appear. Verify that all information is correct and click the Import button located in the upper left corner of the window
10.   Click the Assignments tab. The newly imported assignment will be the first entry in the assignments list

Convert an Assignment to an RO

Eventually, assignments in Summit will need to be converted into an RO. Follow the steps below to convert an assignment to an open RO.

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Assignments tab
4.   Find and highlight the assignment you would like to convert to an RO
5.   Click and hold the mouse button on the highlighted Assignment
6.   Drag the mouse pointer up to the Open RO's tab. When you hover the mouse pointer over the Open RO's tab, the pointer will turn into a pointer with a sheet of paper behind it. When this happens, release the mouse button.
7.   When you release the mouse button, the Convert to Repair Order window will appear. Fill in the required and necessary information (mandatory data has a red star next to them). Click Next to continue
8.   Follow this procedure for the next several screens. When you get to the Calendar screen, verify that the Scheduled In and Target Delivery Dates are correct. Click the drop down calendar for each date and highlight a new date to adjust them. Click Next to continue

9.   Enter the remaining needed information, click Finish, and then Close to complete the process

10.   Click the Open RO's tab to view the newly created RO. The newly created RO will be at the top of the RO List

Estimates Tab

The Estimates tab contains a list of all estimates that have been created in Summit, or imported from an estimating system to Summit. These estimates can then be converted into RO's as work is approved, the car arrives, etc. As mentioned, estimates can be manually written in Summit.

Selecting Estimates to View (Date Range Driven)

Summit allows you to restrict the number of days back for which you would like to view estimates. These settings are established in the Administration module (Company button | Defaults tab). To override the default settings and view a selected date range:

1.   Login to the System Module
2.   Click on the Jobs button
3.   Click the Estimates tab
4.   Right-click on the "Est #: or Unit #:" label in the header information in the upper left corner of the main window
5.   Select Specify Date Range. The Select Dates window will appear.
6.   Select the desired date range you would like to view and click on Save
7.   To return to default date range, simply right-click on the Est# label and choose View Last X Days (Default)

Create a New Estimate in Summit

Summit allows you to manually write estimates in the system. Note that Summit does NOT include a parts or labor database. These items can be manually entered into the system, but are not included in the management system. Follow the steps below to create an estimate in Summit.

1.   Log in to the System Module
2.   Click on the Jobs button
3.   Click on the Estimates tab
4.   Click on the New button located in the utility toolbar (looks like a blank sheet of paper)
5.   The Create New Estimate window will appear. Fill in the requested information (i.e. Creation Method, Assignment Date, etc.) and click Next.
6.   Continue the process by filling in the remaining information about the estimate. When you have entered the information and are ready to finish the

creation process, click Finish and then Close. The system will automatically bring up the Admin section to complete the Customer information.

7.　It is good practice to highlight the newly-created estimate in the list and click the Admin tab and fill in the remaining estimate information

Import an Estimate

After writing an estimate in your estimating software, you will want to import that estimate into Summit. This is essentially the first step in the management process. Importing an estimate allows you to work with that estimate from a management standpoint. It will allow you to manage production, parts, job costs, etc., as well as help you evaluate business progress by generating reports. Follow the steps below to import an estimate.

1.　Log in to the System Module
2.　Click on the Jobs Button
3.　Click on the Estimates tab
4.　Click the Import button
5.　The Import window will appear. From the options located at the top of the window, select the estimating system you want to import an estimate from.
6.　After you select the estimating system you want to import from, a list of estimates available to import will appear. Find and highlight the estimate in the list. Ensure that you have chosen to import the estimate as an estimate instead of an assignment (make this selection at the lower left corner of the screen)
7.　Click the Import Button located in the upper left corner of the window to begin the import process.
8.　A pop-up window will appear telling you the estimate was imported successfully. Click OK.
9.　The Import Preview window will appear. Double-check all line items and admin information to ensure they are correct. When all information has been verified, click the import button located in the upper left corner of the window.

Download Progressive WebTracker Estimates

Summit automates downloading Progressive WebTracker estimates. The system allows you to enter a file and download all estimate files related to that estimate. This requires some specific setup:

1.　Log in to the System Module
2.　Click the Jobs button
3.　Click the Open ROs tab
4.　Click the Import button located in the utility toolbar

5. Click the Setup option at the top left of the Import window
6. Append the URL already in the "Progressive Web Download" with your Progressive WebTracker user name (the user name you use when logging in to Progressive's website)
7. You need to get file numbers available when you log in to the Progressive website
8. After you have file numbers available on the web, click the "Download" link located to the right of the URL
9. The Progressive File Download window will appear
10. Enter the file number of the file you would like to download and click the OK button
11. The file will be downloaded and placed in the Mitchell section of the Import section

Calculate Job Total for an Estimate

The newly imported estimate should now be totaled to ensure correct importing. Calculating an estimate is easy. These steps will show you how to calculate an estimate (this process applies to calculating RO's as well)

1. Log in to the System module
2. Click on the Jobs button
3. Click on the Estimates tab
4. Find and highlight the estimate you want to calculate.
5. Click the Calc button (located in the utility toolbar; looks like a blue/green calculator).
6. Double-check that the imported total matches the total in your estimating system
7. After the Calc is complete you will be asked to check mandatory data. Click yes and Summit will report any mandatory data that is missing. Click OK and the Calc process is complete.

Synchronize an Estimate

Situations will arise when a supplement is written in the estimating software after the estimate has been imported into Summit. You will certainly want these changes accounted for in the management system. The following procedure will show you how to import these changes into Summit. This process is called synchronizing an estimate.

1. Log in to the System Module
2. Click on the Jobs Button
3. Click on the Estimates tab
4. Find and highlight the estimate you want to synchronize

5.   Click the Synchronize Estimate button

6.   The Synchronization Preview window will appear. Ensure all supplement information is correct. Once you have verified all information is correct, click the Import button located in the upper left corner of the window.

7.   Recalculate the RO using the Calc button

8.   Click on the Line Items button to double check that all lines were synchronized correctly

Convert an Estimate to an RO

Estimates generally remain in the Estimates tab until customers and/or insurance companies approve the work to be done. Eventually, you will need to convert estimates into RO's. Follow the steps below to do this. This process is almost identical to converting an assignment to an RO.

1.   Log in to the System Module

2.   Click the Jobs button

3.   Click the Estimates tab

4.   Find and highlight the assignment you would like to convert to an RO

5.   Click and hold the mouse button on the highlighted estimate

6.   Drag the mouse pointer up to the Open ROs tab. When you hover the mouse pointer over the Open ROs tab, the pointer will turn into a pointer with a sheet of paper behind it. When this happens, release the mouse button.

7.   When you release the mouse button, the Convert to Repair Order window will appear. Fill in the required and necessary information (mandatory data will have a red star next to them). Click Next to continue

8.   Follow this procedure for the next several screens. When you get to the Calendar screen, verify that the Scheduled In and Target Delivery Dates are correct. Click the drop down calendar for each date and highlight a new date to adjust them, or simply click the date on the large calendar to set the Scheduled In date. Click Next to continue

9.   Enter the remaining needed information, click Finish, and then Close to complete the process.

10.   Click the Open RO's tab to view the newly created RO. The newly created RO will be at the top of the RO List

Open RO's Tab

The Open RO's tab allows you to view all open RO's in Summit. This allows you to access information about specific RO's, including production tracking, jobs costs, parts management, and Accounts Receivable. There are several useful ways of looking at the list of all open RO's. For example, it might be useful for a parts manager to view the list of all open RO's with regards to the parts status of all RO's. The same might be useful for a production manager, or office personnel in charge of accounts receivable, etc. Summit allows you to break down the system information into useful categories. The methods of organization are called "views". There are six views available in the Open RO's tab: RO List, Production, Job Costs, Parts, Accounts Receivable, Schedule, and Quick Print. Each "view" has distinct functions associated with it, so each view will be discussed individually.

RO List View

The view most familiar to you at this point is the RO List view. The RO List view is a base view, one that all other views are based on. This view contains a list of all open RO's in the system, with basic RO information (Customer name, RO #, Job Total, Estimator, etc.). You have probably noticed that this view is the default view when logging in to the system. Whenever you will log in to the System Module, you will log in to the Jobs button, Open RO's tab, and RO List view. When importing an assignment or estimate, you had to come in to the Open RO's tab, RO List view. The RO List is a starting point for many System Module functions because you have to choose the RO you want to work with.

Schedule Button

The Schedule Button allows you access to department scheduling. This feature is turned on and off with Business Rule 79. (See Business Rules Guide) Department scheduling helps you control when and where the vehicle is when it goes through your shop. For more information on this feature contact Summit Support @ 208-947-1738

Quick Print Button

The Quick Print button is located in the Views toolbar to the left. This button allows you to print The RO and two different types of labels: a) Keytag label (label used to attach to a key chain) and b) Job Folder Labels (used on the outside of job folder). These labels are to be printed on a label printer. (We recommend Seiko Smart Label Printer 200). To print these labels:

    1.   Log in to the System Module
    2.   Click the Jobs button
    3.   Click the Open RO's tab
    4.   Find and highlight the RO you want to print for
    5.   Click the Quick Print button located in the Views toolbar to the left and select the option you would like to print

Another Quick Print option is Repair Order. This option is similar to the RO printing in Line Items. To print the Repair Order:

    1.   Highlight the desired RO
    2.   Click the Quick Print Button and select Repair order
    3.   Select Repair Order only or Combined Totals
    4.   Select the Billing option you want
    5.   Click Save
    6.   On the print option screen select Printer, Preview or File

Assign Labor

You can assign labor for all labor hours on a specific RO directly from the Open RO's list. You can also view which types of labor have been assigned, which have not been assigned, and which have no labor to assign. To view labor assignments, and to assign labor (note that you can match tech skill levels with job difficulty):

    1.   Log in to the System Module
    2.   Click the Jobs button
    3.   Click the Open RO's tab
    4.   Find and highlight the RO for which you would like to assign labor
    5.   Right-click anywhere on the highlighted RO and select Assign Labor
    6.   Another menu will appear showing all labor types with a colored dot next to them. If the dot is blue, labor needs to be assigned. If the dot next to the labor is green, labor has been assigned. If the dot is red, no labor needs to be assigned.
    7.   Click the labor type you would like to assign.

8.   The Labor Allocation window will appear. Select the technician from the list you would like to assign to the labor.

9.   Note that you don't need to exit the Labor Allocation window to assign other types of labor. Click the letter at the top of the window (i.e. 'B', 'R', etc) to assign another type of labor.

10.   Click the Save button to assign all labor and exit the window

Calculate Job Total for an RO

This process is exactly the same for ROs as it is for Estimates.

1.   Log in to the System module
2.   Click on the Jobs button
3.   Click on the Open RO's tab
4.   Find and highlight the RO you want to calculate
5.   Click the Calc button
6.   Double-check that the total in the Totals column is correct

Synchronize an RO with a Supplement

In the event that a supplement is written after the estimate has been converted to an RO, follow the steps below to import the changes to the RO in Summit:

1.   Log in to the System Module
2.   Click on the Jobs Button
3.   Click on the Open RO's tab
4.   Find and highlight the RO you want to synchronize
5.   Click the Synch button
6.   The Synchronization Preview window will appear. Ensure all supplement information is correct. Once you have verified all information is correct, click the Import button located in the upper left corner of the window.
7.   Recalculate the RO using the Calc button
8.   Click on the Line Items button to double check that all lines were synchronized correctly

Print RO Packet Reports

Summit includes many reports/forms generally related to most RO's. The RO Packet includes the following reports: Vehicle Inspection Report, Vehicle Identification Report, Job Worksheet, Repair Authorization, Warranty, Quality Control Checklist, Job Cover Sheet, Job Worksheet w/ prices, Pre-Filled Vehicle Inspection, Job File Cover Sheet, Hat/Unit I.D. Sheet, and Tech Supplement/Supplies.
Note: The Repair Authorization Report brings up a window with "Original Promise Date" for customer and can be changed.

Some of these forms and reports are general in nature and do not pertain to the currently selected RO. However, some reports in the RO Packet DO pertain to the currently selected RO. Be sure to verify you want to print the report/s you selected.

The following reports DO NOT pertain to the selected RO:
1.   Vehicle Inspection Report
2.   Quality Control Checklist

The remainder of all the reports pertains to the currently selected RO. To print any or all of the reports in the RO Packet:

1.   Login to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Select the RO List view
5.   Find and highlight the RO for which you would like to print reports
6.   Right click anywhere on the selected line and click Reports from the options that appear
7.   The Print window will appear. Put a check in the checkbox next to the report(s) to select the report or reports you would like to print and click the Print button
8.   The Report Preview window will appear. Verify you have selected the correct reports and click the Print icon located in the upper left corner of the window
9.   The report(s) will then be printed

Merge an Estimate with an RO

Merging is used to accommodate timing issues with importing RO's. For example, instances will occur when a job has not been imported into Summit yet, but production has started or parts need to be ordered. To track this, a 'dummy' RO can be manually created in Summit. However, when the estimate is finally imported into Summit, two entries will exist for the same job (the test RO and the estimate that was imported). Merging allows you to combine the two together so only one entry in Summit will exist. To merge an estimate with an RO:

1. Log in to the System Module
2. Click on the Jobs Button
3. Take note of the test RO's RO#
4. Click on the Estimates tab
5. Highlight and right mouse click the estimate you want to merge
6. On the menu click Merge Files. Enter the RO number you would like to merge the selected estimate with. Once you have entered the RO number, click OK. A Warning window will appear. Verify that you want to proceed. **BE SURE THE ESTIMATE AND RO ARE CORRECT!! THIS IS NON-REVERSIBLE.** Once you are sure you want to proceed, click on Yes.
7. The information from the estimate will be merged with the information from the RO. The following Admin fields from the estimate will overwrite the RO: year, make, model, style, license, color, production date, VIN, and job rates.
8. You will then be asked if you want to change the customer and vehicle information. If you select "Yes" then the customers' admin data will change to what was in the estimate. If you select "No" the original Admin data will remain unchanged.
9. After the merge has completed, a Re-Scheduling screen will appear for you to accurately schedule the RO for repair.
10. Because you have just changed the scheduled out date you will need to select a Target Date Change Reason. Select a reason from the dropdown list and click save.

Parts Price Changes and Estimating Two-Way Interfaces

The PPC button located in the utility toolbar allows you to view all parts price changes on the selected job in the list of all open repair orders. Summit also allows you to send all parts price changes made in the system back to the estimating system. To use the estimating two-way interface:

1. Log in to the System Module
2. Click the Jobs button
3. Click the Open Ro's tab
4. Find and highlight the job for which you would like to send parts price changes back to the estimating system.
5. Click the PPC button located in the utility toolbar.
6. The Parts Price Changes window will appear. All line items with parts price changes and supplement numbers on the selected repair order will appear in the window.
7. Click the Tag box to select all Part Price Changes you want to send back to the estimating system.
8. To send parts price changes to the estimating system, click the Send PPC's button located at the bottom of the window.

Note: That if the Send PPC's button is grayed out, either the PPC path is not set up correctly (See the Administration Module | Company Button | System Paths tab section of the manual) or the original EMS file does not exist and needs to be re-exported from the estimating system.

Note: Matched Tagged is used to change any part prices with an adjusted list back to the original price.

Production View

The second Open RO's view is the Production view (also known as Summit's visual production tracking system). The Production view is a visual representation of the job status of all open RO's and is designed to help the production managers be more efficient. You can change to the Production view by clicking "Production" in the "Views" toolbar to the left.

The general layout of the Production view is unique. Each horizontal row represents one RO. The selected RO appears in a different color. Note that the customer and job information is located in the left portion of each row. Moving left to right you will find squares representing each production department, and a vehicle image in one of those squares. That vehicle image represents vehicle status for that job. In other words, the

location of the vehicle image corresponds with the department the vehicle is actually in. This makes production management and tracking simple and visually based.

There are two other important features of the Production view. First, below the customer and job information for each row you will find a label "Labor", followed by several blue or green letters. These letters represent labor types, and the amount of labor for each type for that job. You will use these letters to assign labor (discussed later). The second feature, "Parts", is immediately right of the "Labor" information. The "Parts" label shows the parts status for that job.

Viewing WIP Departments Only

You can choose to view only jobs currently in departments marked as WIP (see Production setup in Administration Module). To view only WIP jobs, put a checkmark in the <u>WIP Only</u> checkbox located in the utility toolbar.

Assign Labor and Print Job Worksheets

One of the first things you will need to do when managing production is assign labor to specific technicians. This is done from the Production view. You will need to assign technicians to each type of labor needed for each job. The following procedure will help you assign labor (note that you can match tech skill levels with job difficulty):

1. Log in to the System Module
2. Click on the Jobs Button
3. Click on the Open RO's tab
4. Choose the RO List view
5. Find and highlight the RO you want to assign labor for
6. Select the Production view. The job you highlighted in the RO List view will be highlighted in gray.
7. The capital letters labeled "Labor" indicate the types of labor (B=Body, R=Refinish, M=Mechanical, etc). If the letters are blue, labor has not yet been assigned. If they are green, then labor has been assigned. If the letters are black, there is no labor to assign.
8. To assign labor, click the letter corresponding with the labor that needs to be assigned.
9. The Labor Allocation window will appear. Select the technician or team you want to assign from the drop down menu labeled "Tech".
10. Put a checkmark in the box labeled "Apply to Line Items". This will associate the assigned technician with the assigned labor line items. This is only necessary if you will be using technician worksheets.

11.   Click Save to assign the labor. The letter you clicked will then turn green. Repeat this process for all unassigned labor (letters highlighted in blue).

After assigning all labor, you may want to print job worksheets for assigned technicians. Several different types of worksheets can be printed from Summit. For example, standard worksheets, technician worksheets, and department worksheets can be printed. You can also print worksheets with a supplement only, or you can include part prices. Follow the instructions to print job worksheets:

1.   Log in to the System Module
2.   Click on the Jobs Button
3.   Click on the Open RO's tab
4.   Choose the RO List view
5.   Find and highlight the RO you want to assign labor for
6.   Select the Production view. The job you highlighted in the RO List view will be highlighted in gray.
7.   Click the blue "Wks" located below the customer information. This will bring up the Select Job Worksheet Style window
8.   Select the type of worksheet you want to print and click Save. Note that the technician worksheet will print correctly only if you put a check mark in the "Apply to Line Items" box when you allocated labor.
9.   The Output Options Report Preview window will appear. Choose the option that applies (most often "Preview") and click OK
10.   If you chose to preview the report, ensure that it is the style you want and click the Print icon located in the upper left corner of the window (icon looks like a printer). The report will then print to your default printer

Move a Vehicle Through Production / Change Job Status

You will eventually need to move vehicles from department to department in the production process. This will help you and your production manager track vehicles in production. Summit also has the capacity to automatically flag assigned labor. Labor is automatically flagged as vehicles move departments. The labor allocated to the previous department is flagged when it is moved to the next department. This process is "invisible", which means you do not have to do anything but set the system up correctly to automatically flag labor. For that reason, no instruction is needed for auto-flagging. However, follow the steps below to move a vehicle to the next production department:

1.   Log in to the System Module
2.   Click on the Jobs Button
3.   Click on the Open RO's tab
4.   Choose the RO List view
5.   Find and highlight the RO you want to assign labor for
6.   Select the Production view. The job you highlighted in the RO List view will be highlighted in gray.
7.   To move a vehicle to the next production department, click on the vehicle, drag it to the next department, and drop it there.
Note: The Department Checklist Items box may appear. This message box warns you of what needs to be done/has been done. Check the boxes and select complete. Then click the X in the upper right corner.
8.   Note that the "Status" field in the customer and job information at the top of the screen has changed
9.   If a "Missing E-Mail Address" message appears, fill in the requested e-mail address and click OK, or click Cancel to continue. An e-mail address is only needed if you are using Summit's integrated automatic status notification

Add a Warning Flag to an RO

Situations arise when you will need to "mark" certain RO's because of special circumstances. For example, work might be halted on a certain RO pending approval from the customer to continue work. RO's that need to be tracked because of special circumstances can have a Warning Flag added to them to let all system users know that there is some kind of abnormality with the RO. These reasons were defined when you set up the system in the Administration Module. Here is how you add a Warning Flag to an RO:

1.   Log in to the System Module
2.   Click on the Jobs Button
3.   Click on the Open RO's tab

4.   Choose the RO List view
5.   Find and highlight the RO you want to assign labor for
6.   Select the Production view. The job you highlighted in the RO List view will be highlighted in gray.
7.   Right-click on the icon that represents the vehicle in the production process.
8.   Choose Add Warning Flag. The Production Warning Flag window will appear. Select a "Warning Flag Note" from the drop down menu, or type notes into the line.
9.   Click Save to finish. Note that a warning flag has been added near the customer information in the left portion of the row. In addition, the Warning Flag reason is listed beneath the "Status" field in the customer information at the TOP of the screen.

To remove a Warning Flag, right click on the vehicle image in the Production view and choose "Remove Warning Flag". The Warning Flag will then be removed.

Assign Job Priority Level

You may wish to assign priority levels to certain jobs. This will allow you to sort all open RO's by their priority level, and allow you to keep track of jobs that have a higher priority than others. The following procedure will show you how to assign priority levels to RO's:

1.   Log in to the System Module
2.   Click on the Jobs Button
3.   Click on the Open RO's tab
4.   Choose the RO List view
5.   Find and highlight the RO you want to assign labor for
6.   Select the Production view. The job you highlighted in the RO List view will be highlighted in gray.
7.   Click on the blue box located in the left corner of the highlighted row. The Job Priority Level window will appear. **NOTE:** Higher Priority level indicates higher priority (10 is higher than 1). Use the up and down arrows to set the priority level, and click Save.

Search the Production View

Searching the Production view for a specific customer or RO can he very useful when dealing with the details of the production process for individual RO's. There are two search options in the Production view: search by customer name, or search by RO number. To use these search features in Summit:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Select the Production view
5.   Click the Search button located in the upper right portion of the window
6.   Four options will appear: Search for RO#, Search for Unit#, Search for Name and Search for License#. Select the option you would like to use. The Search dialog will appear.
7.   Enter the appropriate information (name or RO#) and click OK.
8.   If the search finds any matches, the first match will be highlighted. If no matches exist, the curser will not move

Sort the Production View

Sorting the Production view can be an effective production management tool. There are ten different sorting methods available in the Production view: RO #, Scheduled Out, Estimator, Current Tech, Body Tech, Paint Tech, Status, Warning Flag, Priority Level, and Hat/Unit#. Each of these sorts can help you to identify problems early and track production flow of your shop. Here's how to sort the Production view:

1.   Log in to the System Module
2.   Click on the Jobs Button
3.   Click on the Open RO's tab
4.   Choose the RO List view
5.   Select the Production view.
6.   Select the sort method from the drop down menu located in the middle of your screen to the right of the sub tabs.
7.   The Production view will automatically be sorted according to the selected sort method.

There are also sub-tabs for each production department in the Production view. This allows you to view only the RO's in one department. These sub-tabs are located below the Open RO's tab. There is a tab for each department, and the default tab (All) displays all RO's in all departments. To view the RO's in only one department, click the department sub-tab.

Print Production View Reports

There are several reports available in the Production View: RO Roster (Separate Pages), RO Roster, Technician Production Report, Production Walk-through Worksheet, RO Roster w/ Warning Flags, Photo Report, RO Roster (double-spaced), Technician Production (Double Spaced), and Production Walk-through Worksheet (double-spaced).

The first two reports (RO Rosters) print all RO's showing on the screen. The way you sort or limit the Production View is the way these reports will print. These two reports show each RO on the screen along with labor hours (Body hrs., etc), labor assignments and current status. The RO Roster (Separate Pages) prints one RO per page, whereas the standard RO Roster prints in list format.

The rest of the reports are designed to complement the daily activities of most production managers. The Technician Production Report prints a separate page for each technician. Each page lists all current assignments for that technician. The Production Walk-through Worksheet lists all RO's and their current status, and leaves space for notes that can be entered into the system later.

To print any of these reports:

1. Log in to the System Module
2. Click the Jobs button
3. Click the Open RO's tab
4. Select the Production View
5. Sort or limit the Production View as desired, or leave the screen as it is
6. Click the Print button located in the utility toolbar (looks like a printer)
7. The Print window will then appear. Select the report/reports you would like to print by putting a check in the checkbox to the left of the report name
8. Click the Print button. The Print Preview window will appear. Verify that you want to print the report, and that it is in the format you want, and then click the Print icon located in the upper left corner of the window.
9. The report/reports will then be printed.

Job Costs View

The Job Costs view displays a list of all open RO's from a job costs standpoint. It lists all open RO's, Job Total, Cost Total, and Percent Margin for the job. This allows owners, managers, and those responsible for job costing to view cost information for all open RO's. The overview available in the Job Costs helps you identify problems or abnormalities with job costing (missing invoices, over flagged labor, etc.). The Job Costs view serves as a good starting point for job cost work. The % column is color coded to show if a job falls within the acceptable profit percentage range. Jobs that are currently in the acceptable range are color-coded green, and jobs outside the range are red. To get an accurate job costing image click the Re-Calc button. Clicking the Re-Calc button will give you the option to recalculate all ROs or just the one selected. Click Yes to recalculate all the ROs.

Parts View

The Parts view is geared to help your Parts Manager track the parts status of all open RO's. The Parts view is very similar to the RO List view, but with different information in the table. The Parts view is designed to give a visual overview of the parts status of all open RO's, and uses color coding to indicate whether action is needed for an RO or not. Click the Parts button located in the "View" toolbar to the left to see the Parts view. The "Parts" column uses green to indicate that no action is needed for that RO, and yellow to indicate that action is needed. In addition, the column labeled "OCR" represents the number of outstanding credit returns the RO has. If there are any OCR's for an RO, the column will be colored red for that RO.

The Parts view acts mostly as a starting point for further operation of specific RO's, just like the RO List view. There is, however, one operation that is exclusive to the Parts view. The Parts Locator allows you to match "lost" parts with the RO's they belong to. The Parts Locator allows you to enter a part number and will match that number with all RO's that have that part as a line item. The Parts Locator also lets you search for a specific vendor invoice number to match invoices with the RO's they belong to. Here's how to use the Parts Locator:

1. Log in to the System Module
2. Click on the Jobs Button
3. Click on the Open RO's tab
4. Choose the Parts view
5. Click the Locate button located in the utility toolbar (looks like a magnifying glass)
6. The Received Parts Locator window will appear. Enter either a part number OR a vendor invoice number in the "Enter Part #" field located at the top of the window. This field is case sensitive, so you must enter the part number or

invoice number <u>EXACTLY</u> as it appears in the system, or the search will not find the part.

7.   After you have entered the part or invoice number, click the Search button located next to the "Enter Part #" field. All matches will appear in the window

The Parts View also includes a Late button, which shows all late parts for all open repair orders, as of a certain date. To use the Late button:

1.   Log in to the System Module
2.   Click on the Jobs Button
3.   Click on the Open RO's tab
4.   Choose the Parts view
5.   Click the Late button located in the utility toolbar
6.   The Late Parts Listing window will appear. This contains a list of all late parts as of the current date.
7.   To print the list of late parts, click the Print button located in the upper right corner of the Late Parts Listing window

The IOU's button allows the parts manager to manage all outstanding IOU's (items still owed to customers). This button will allow the person using the Parts view to see all IOU's, mark them as ordered, received and installed. To use the IOU's button:

1.   Log in to the System Module
2.   Click on the Jobs Button
3.   Click on the Open RO's tab
4.   Choose the Parts view
5.   Click the IOU's button located in the utility toolbar
6.   The IOU Management window will appear. This window shows totals for each category of IOU, as well as lists all outstanding IOU's for all jobs.
7.   To mark an IOU as ordered, received or installed, simply put a check in the appropriate checkbox in the grid.
8.   To print the list of IOU's, click the Print button

Filtering the Parts View

The Parts view can be filtered according to different parts status. To filter the Parts view:

1.   Log in to the System Module
2.   Click on the Jobs Button
3.   Click on the Open RO's tab
4.   Choose the Parts view
5.   Select the filter you would like to use from the dropdown menu located in the utility toolbar. Choose (All Parts Status') to view all repair orders.

Accounts Receivable View

The fifth Open RO's view, Accounts Receivable, is designed mainly for those who need to track payments, such as receptionist, accountant, or other office personnel. The A/R view lists all open RO's with respect to payment and payment history. All payments accepted will be recorded in this view.

Receive Payment

As you receive payments for RO's, you will want to record the payment(s) in Summit. As stated, this is done from the Accounts Receivable view of the Open RO's tab. The following steps will walk you through entering a payment in Summit:

1.   Log in to the System Module
2.   Click on the Jobs Button
3.   Click on the Open RO's tab if the job you are accepting payment for is still open, or click the Closed RO's tab if the job has been closed
4.   Choose the A/R view
5.   Find and highlight the RO you would like to accept payment for
6.   Click the History button located in the utility toolbar
7.   The A/R Payment window will appear. Click New and fill in the appropriate information (i.e. Payment Date, Amount, etc.) then click the Save button. Note that the deductible amount is viewable below the invoice amount in the A/R Payment window.
8.   Note that A/R Payments can be exported to QuickBooks. This may be done before the job has closed.

You may want to view the payment history for any particular RO. This is done with only a couple of mouse clicks. Here's how you do it:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click on the Open RO's tab if the job you are accepting payment for is still open, or click the Closed RO's tab if the job has been closed
4.   Find and highlight the RO you would like to view the payment history for
5.   Click the History button located on the toolbar
6.   The A/R History window will appear

Closing an RO

As work on open RO's is completed, the vehicle is delivered, and/or payment is received, then the completed jobs will need to be closed. This seems like an obvious step, but important to mention because several reports in Summit depend on accurate closing dates to produce useful information. Before you close an RO, double check that all labor has been flagged and all parts are accounted for, including Outstanding Credit Returns. Be sure that all DRP compliance requirements have been fulfilled, shop procedures have been followed, etc.

Note: You will not be allowed to close an RO if Business Rule #30 is enforced and labor for the job to be closed is either under flagged or over flagged. Popup menus will appear if these conditions are not satisfied indicating what the problem is.

Once you are sure the RO is ready to be closed, follow these steps to close the RO:

1.   Log in the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Find and highlight the RO you would like to close
5.   Drag the mouse pointer up to the Closed RO's tab. When you hover the mouse pointer over the Closed RO's tab, the pointer will turn into a pointer with a sheet of paper behind it. When this happens, release the mouse button.
6.   When you release the mouse button, the Job Closing window will appear. The window will show you if all parts have been received, whether or not you have any outstanding credit returns, and the current A/R balance. It will also list allocated and flagged labor. Ensure that all information is correct.
7.   Click the Compliance Task List tab located at the bottom of the Job Closing window. This will bring up a list of all compliance tasks for this job. Ensure that all have been completed and checked off. The job will not close if there are any unchecked tasks.
8.   Click the Summary tab to return to the main screen. Once you are ready to close the job, click Save.
9.   Enter the closing password in the popup window that appears and confirm that you want to close the job.

10.   You will then get a message that the RO has been successfully closed. The RO can now be found in the Closed RO's tab.

Closed RO's Tab

The Closed RO's tab is a holding place for all closed RO's. The Closed RO's tab is almost identical in layout to the Open RO's tab. The five "views" available in the Open RO's tab are available in the Closed RO's tab, except for the Production view. This is not available for the obvious reason that all closed jobs have left the production cycle. The other four views (RO List, Parts, Job Costs, A/R) are available because each contains important information for closed RO's (e.g. outstanding credit returns in the Parts view). There are no unique procedures in the Closed RO's tab. Use the Closed RO's tab to follow up on closed RO's, ensure you receive credit for returned parts, and evaluate performance based on job costs.

Voided Tab

The Voided tab is like a permanent wastebasket for all assignments, estimates and RO's imported into Summit. Assignments, estimates and RO's are NEVER deleted from Summit once they are imported into the system. This protects the data from randomly being erased, as well as allowing you to recover "deleted" RO's. Note that when voiding an RO or estimate, you will be asked to give a reason why the job was voided (set up in the Administration Module).

Purging Voided RO's

Summit allows you to purge (permanently delete) voided RO's by date range. To purge RO's:

1.   Log in the System Module
2.   Click the Jobs button
3.   Click the Voided tab
4.   Click the Purge button located in the utility toolbar
5.   The Select Dates window will appear. Select the date range for deletion (estimate date) and click the Save button.
6.   You will be asked if you are sure you want to delete the Voided RO's. Click Yes to delete, or No to cancel

Lost Business tab

The Lost Business tab is where you store any ROs that are lost. Some reasons why a job might be lost; customer took cash settlement, insurance steering, or customer spent insurance money just to name a few.

1. Log in the System Module
2. Click the Jobs button
3. Click the Open RO's tab
4. Find and highlight the RO you would like to send to Lost Business.
5. Drag the mouse pointer up to the Lost Business tab.
6. When you release the mouse button, the Lost Business window will appear. The window will ask for a reason, select one and click Save.

Note: If the RO has payments received, parts received, or Labor costed you cannot move it to Lost business.

Admin Button

The Admin button controls all administration data for each RO. Before discussing this button further, remember that you must select which RO you want to work with in the Jobs button, usually from one of the Open RO's views. Therefore, to view the administration data for an RO, click the Jobs button, select the RO you want to work with by highlighting it in one of the tabs or views, and click the Admin button.

The Admin button is divided into six tabs: Customer, Vehicle, Job Rates, Insurance, General, and Dates. These tabs represent types of administration data available for the selected RO. For example, all insurance information for the selected estimate or RO is located in this tab. This applies to all six tabs. Adding administration data for a job is done in one of these tabs. You can also edit existing admin information using these tabs. Each of the six tabs will be discussed briefly. Note that this section of the System Module is very similar to sections of the Administration Module.

Customer Tab

The Customer tab contains basic customer information including names, contacts, telephone numbers, and addresses. This information can be entered or changed. Follow the steps below to enter or change information in the Customer tab:

1. Log in to the System Module
2. Click the Jobs button
3. Click the Open RO's tab
4. Find and highlight the RO you would like to enter or edit administration information for
5. Click the Admin button
6. Click the Customer tab (located beneath the Admin button)
7. Click the field you would like to enter or edit information for
8. Enter the appropriate information in the field you clicked on
9. Click the Save icon to save the change (if you do not click save before exiting the Customer tab, the information you entered will not be saved and the field will return to how it was before you changed it)
10. Repeat these steps for all fields in the Customer tab you would like to enter or edit

Vehicle Tab

All information about the vehicle is located in the Vehicle tab. This information includes Year, Make, Model, Mileage, VIN #, etc. Much of this information is imported from your estimating system, but some of it is not. If there is needed information that is not imported from the estimating system, it can be entered in the Vehicle tab. In addition, if data was entered incorrectly in the estimating system, it can be edited in the Vehicle tab. To enter or change data in the Vehicle tab:

1. Log in to the System Module
2. Click the Jobs button
3. Click the Open RO's tab
4. Find and highlight the RO you would like to enter or edit administration information for
5. Click the Admin button
6. Click the Vehicle tab (located beneath the Admin button)
7. Click the field you would like to enter or edit information for
8. Enter the appropriate information in the field you clicked on
9. Click the Save icon to save the change (if you do not click the Save icon before exiting the Vehicle tab, the information you entered will not be saved and the field will return to how it was before you changed it)

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10.   Repeat these steps for all fields in the Vehicle tab you would like to enter or edit

Job Rates Tab

The Job Rates tab is similar to the first two tabs. It contains all job rates (including tax rates) for each job. The instructions below will help you set up or edit job rates:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Find and highlight the RO you would like to enter or edit administration information for
5.   Click the Admin button
6.   Click the Job Rates tab (located beneath the Admin button)
7.   Click the field you would like to enter or edit information for. If the job was imported from an estimating system, the rates in the "Rates" fields are those applied in the estimating system. If the estimate was manually entered into Summit, you can apply rates. Choose rates from the "Select Rates" dropdown menu at the bottom of the window (these rates were set up in the Administration Module)
8.   If you selected a field, enter the appropriate information in the field you clicked on
9.   Click the Save icon to save the change (if you do not click the Save icon before exiting the Job Rates tab, the information you entered will not be saved and the field will return to how it was before you changed it)
10.   Repeat these steps for all fields in the Job Rates tab you would like to enter or edit

Insurance Tab

The Insurance tab is somewhat different from the other three tabs in that not all fields are editable. This Insurance tab contains information about the insurance company, like company name, address, etc. It also includes RO-specific information like claim #, appraiser/adjuster, etc. Information not RO-specific (like insurance company name) cannot be edited. This information can only be changed in the Administration Module of Summit. However, here is how to edit RO-specific information:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab

4.   Find and highlight the RO you would like to enter or edit administration information for

5.   Click the Admin button

6.   Click the Insurance tab (located beneath the Admin button)

7.   Click one of the RO-specific fields (Policy Number, Claim Number, Deductible, etc.)

8.   Enter the appropriate information in the field you clicked on

9.   Click the Save icon to save the change (if you do not click the Save icon before exiting the Insurance tab, the information you entered will not be saved and the field will return to how it was before you changed it)

10.   Repeat these steps for all fields in the Insurance tab you would like to enter or edit

General Tab

Information about the estimate or RO that does not fall into one of the other categories is found in the General tab. This includes estimate # and RO # (not editable in this screen), referral source, estimator, etc. Most fields in this tab have a dropdown menu that allows you to choose from pre-entered options. Here's how to enter or edit general administration data:

1.   Log in to the System Module

2.   Click the Jobs button

3.   Click the Open RO's tab

4.   Find and highlight the RO you would like to enter or edit administration information for

5.   Click the Admin button

6.   Click the General tab (located beneath the Admin button)

7.   Click the dropdown menu for the field you would like to edit, or click the field itself if there is not a dropdown menu

8.   Enter the appropriate information in the field you choose

9.   Click the Save icon to save the change (if you do not click the Save icon before exiting the General tab, the information you entered will not be saved and the field will return to how it was before you changed it)

10.   Repeat these steps for all fields in the General tab you would like to enter or edit

Dates Tab

Summit has the ability to track important RO-related dates, such as approval dates, target delivery dates, etc. These dates are important for several reports, like the cycle time analysis report. Some of these dates are recorded when action is taken on the RO (when the RO is created, for example). These dates cannot be changed. Many of the dates, however, can be changed. Here is how you enter or change RO dates:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Find and highlight the RO you would like to enter or edit administration information for
5.   Click the Admin button
6.   Click the Dates tab (located beneath the Admin button)
7.   Click the dropdown calendar for the field you would like to edit, or click the field itself if there is not a dropdown menu
8.   Enter the appropriate information in the field you choose
9.   Click the Save icon to save the change (if you do not click the Save icon before exiting the Dates tab, the information you entered will not be saved and the field will return to how it was before you changed it)
10.   Repeat these steps for all fields in the Dates tab you would like to enter or edit

Line Items Button

Line items represent parts and labor to be done for an RO. The Line Items button lists all line items for the selected RO. You will use the Line Items button to add or adjust lines for an RO, as well as mark supplements. This section of Summit also generates the final invoice for all jobs. In addition, there are several functions found only in the Line Items button: marking an open RO as a total loss job and adding line item notes. You can also group supplemental lines together in whatever fashion you choose.

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. You can use the scrubber by doing the following:

1.   Log in to the System Module
2.   Click on the Jobs button
3.   Click on the Open RO's tab

4.   Select the RO you wish to use, then click the Line Items Tab.
5.   Click on the Scrub button in the top left.

Once in the Scrubber, you will see your list of Scrub Items

1.   Use the arrows at the bottom of the screen to add a Scrub Item based on an existing line item.
2.   Arrow over to the desired line item and select the new button to add the Scrub Item.

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

Add a New Line Item / Edit / Delete Current Line Item

You may want to add a new line item at some time in the production process. Lines can be manually entered using the following procedure:

6.   Log in to the System Module
7.   Click on the Jobs button
8.   Click on the Open RO's tab
9.   Find and highlight the RO you would like to add a line item to
10.   Click the Line Items button
11.   Click the Estimate/Repair Order tab or the Supplement tab
12.   Click the New button located in the utility toolbar OR right click anywhere in the table and choose Quick Add.
13.   The new line will appear at the bottom of the list. Fill in all needed information for the line and click the Save icon located in the utility toolbar to save the line

You may also want to edit one or more of the existing lines on an RO. This can be done easily by:

1.   Log in to the System Module
2.   Click on the Jobs button
3.   Click on the Open RO's tab
4.   Find and highlight the RO for which you would like to edit line items
5.   Click the Line Items button
6.   Click the Estimate/Repair Order tab or the Supplement tab
7.   Highlight the record from the line item list that you would like to edit
8.   Make any changes to that line
9.   Click the Save icon in the utility toolbar to save the changes to the record
10.   Repeat this process for all lines you would like to change

Add Line Notes for a Line Item

Shop managers and estimators may need to make quick notes about specific lines for the technicians responsible for those lines. These notes can be anything from labor clarification to a note to see the estimator before beginning work. Adding notes to line items is as follows:

1. Log in to the System Module
2. Click on the Jobs button
3. Click on the Open RO's tab
4. Find and highlight the RO for which you would like to makes line item notes
5. Click the Line Items button
6. Click the Estimate/Repair Order tab
7. Click the Notes button located in the utility toolbar
8. Add the line note in the window that pops up and click OK
9. Line items with line notes are highlighted in light blue

Create a Total Loss Job

When insurance companies decide a job is not worth saving, you need to mark that job as a total loss. All total loss jobs are highlighted in red in the Open RO's, RO List view. Marking the job as a total loss will 1) automatically return all received parts and 2) zero out the job. Here's how to create a total loss job:

1. Log in to the System Module
2. Click on the Jobs button
3. Click on the Open RO's tab
4. Find and highlight the RO you would like to make a total loss
5. Click on the Line Items button
6. Click the Total Loss button located in the utility toolbar
7. A Warning window will appear to confirm you want to zero out the job and return any received parts. Click Yes to proceed
8. All received parts will be returned and the job will be zeroed out. The RO will be highlighted red in the Open RO's, RO List view

Line Items Tabs

There are four tabs under the Line Items button: Estimate/Repair Order, Supplement, Invoice, and Totals. These tabs separate line items into useful categories. It also allows you to determine supplement numbers for certain lines.

Estimates/Repair Order Tab

The Estimates/Repair Order contains information like line #, labor operation and type, payment, part type and price, and labor hours. You may also click the down arrow on the keyboard to add a new line. This tab contains all lines for the job. You can also add a new line and copy entire line items, or just refinish or parts upgrade.

Supplement Tab

The Supplements tab is very similar to the Estimates/Repair Order tab, but with several key differences. The first difference between the two tabs is an added column next to the line number column (usually the first column to the left) labeled "S#". This column represents the supplement number for the line. This number is added when you want to mark one or more lines as a supplement. Here's how to give line items a supplement number:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Find and highlight the RO you would like to work with from one of the Open RO's views
5.   Click the Line Items button
6.   Click the Supplement tab
7.   Find and highlight the line you would like to give a supplement number
8.   Highlight the "S#" column (usually the second column from the left)
9.   Enter the supplement number you would like to give that line (must be a number from 1– 9)
10.   Follow this procedure for all lines you want to assign supplement numbers to. If you want to group more than one line together, give those lines the same supplement number
11.   Click the Save icon to save the changes made to the supplement numbers

Several of the other columns in the Supplements tab are different than the Estimates/Repair Order tab. The Supplement tab includes columns for adjusted list price, additional labor and additional refinish labor. These list the details of any supplement in the system. These columns can be edited just like the columns in the Estimate/Repair Order. Any changes listed in the Supplement are in addition to the labor and/or part price listed in the Estimate/Repair Order tab. In other words, the hours or prices in the Supplement tab are added to or subtracted from the hours or prices in the Estimate/Repair Order.

Automatic Calculations Button

The Automatic Calculations button is a tool designed to automatically calculate paint material, shop supplies, hazardous waste removal and storage charges costs. It will also automatically add lines for each cost calculated. This button is used most often with estimates entered manually in Summit. Here's how to use the Automatic Calculations button:

1. Log in to the System Module
2. Click the Jobs button
3. Click the Open RO's button
4. Find and highlight the RO you would like to work with
5. Click the Line Items button
6. Click the Automatic Calculations button located in the utility toolbar (Labeled Auto)
7. The Automated Calculations window will appear. Check the box next to the items in the "Calculation" column you would like to calculate (you may choose any or all of them).
8. Fill in the desired rate for each item you selected in the "Rate" column OR select a flat rate to apply by checking the box next to the "Use Flat Rates" column and selecting the flat rate to be applied
9. When you are ready to calculate and add lines for the selected items, click the Save icon
10. Note that line items for each selected calculation have been added to the end of the list of line items

Mark Up a Line Item

Marking up a line item increases the list price of the item by a certain percentage of the original price. This allows you to essentially specify how much profit you would like on the specific line item. To mark up a line item:

1. Log in to the System Module
2. Click the Jobs Button
3. Click the Open RO's Tab
4. Find and highlight the RO which has the part you would like to mark up from the list of open RO's
5. Click the Line Items button to view the line items for the selected job
6. Find and highlight the line you would like to mark up
7. Right click on the highlighted line and choose Markup Line Item
8. The Markup Line Item window will appear. Select the Standard method, Margin method or the Cost method you would like to mark the line up and click Save

9.   The List Price for the line item will be increased by the selected percentage

Invoice Tab

It may be useful to view a combination of the Estimate/Repair Order and Supplement tabs. This is found in the Invoice tab. The Invoice tab contains the basic information from the Estimate/Repair Order tab, and includes the supplemental information from the Supplement tab. No information in the Invoice tab can be edited; all editing and additions to line items must be done in the Estimate/Repair Order or Supplement tabs.

Totals Tab

The Totals tab combines the labor and parts prices in the Estimate/Repair Order and Supplement and allows you to print final invoices. The Totals tab gives you several totals options: repair order only, supplement only, or combined totals (repair order + all supplements). Each choice produces different reports/invoices and will be discussed separately.

Print a Repair Order

Printing a repair order may be useful in a variety of different situations, including customer approval of work. These repair orders do not include supplements added to the repair order. Here's how to print only a repair order:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Find and highlight the RO for which you would like to print a repair order
5.   Click the Line Items button
6.   Click the Totals tab. Select the "Repair Order Only" option
7.   Select No Billing Totals, Insurance, or Customer from the Job Calculations dialog box then click Save
8.   Verify that the totals for the repair order are correct
9.   Click the Print button located in the utility toolbar (looks like a printer)
10.   The Print window will appear. Check the type of repair order you would like to print (Repair Order OR Repair Order (Dollars)) and click the Print button
11.   The Report Preview window will appear. Review the totals, ensure they are correct and click the Print button located in the upper left corner of the window

Print a Supplement

You may also want to print a supplement only. This process is almost identical to printing a repair order. Follow the steps below to print a supplement:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Find and highlight the RO for which you would like to print a repair order
5.   Click the Line Items button
6.   Select the supplement number you would like to work with (note that if you have not given supplement numbers to line items, the supplement you print will be exactly like the repair order). This is done with the option box located in the upper middle portion of the screen (beneath the Schedule and Reports buttons)
7.   Click the Totals tab. Select the "Supplement Only" option
8.   Select No Billing Totals, Insurance, or Customer from the Job Calculations dialog box then click Save
9.   Verify that the totals for the Supplement are correct
10.   Click the Print button located in the utility toolbar (looks like a printer)
11.   The Print window will appear. Check the type of Supplement you would like to print (Supplement OR Supplement (Dollars)) and click the Print button
12.   The Report Preview window will appear. Review the totals, ensure they are correct and click the Print button located in the upper left corner of the window

Print a Final Invoice/Final Bill Letter

The final invoice and final bill letter will naturally need the combination of the original repair order and all supplements. Summit has several different invoice styles to choose from. The following procedure will help you to print final invoices and bill letters:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Find and highlight the RO you would like to print a final invoice or bill letter for
5.   Click the Line Items button
6.   Click the Totals Tab Select No Billing Totals, Insurance, or Customer from the Job Calculations dialog box
7.   Choose the "Combined Totals" option and click Save

8.   Totals, including sub totals and sales tax, will appear. Verify that the totals are correct and click the Print button locate in the utility toolbar (looks like a printer)

9.   The Print window will appear. Check the type of invoice you would like to print by checking the box next to the desired invoice style (you can print more than one at a time by checking more than one style). Once you have chosen the invoices you would like to print, click the Print button

10.   The Report Preview will appear. Again, verify that the totals are correct and click the Print button locate in the upper left corner of the screen to print the invoices

Parts Button

The Parts button is where you will do all parts management and organization. This button will help you track the status of parts of individual RO's. The Parts button has unique and powerful features like a single-click return and re-order button, cost transferring, and an easy-to-use format. Use the Parts button to order, receive, backorder, and credit return parts for any RO in the system. Color-coding makes identifying which parts have been ordered simple.

There are four distinct states a part can be in: ordered, received, backordered or returned for credit. The Parts button has five tabs to account for these states, one for each status, and one tab that shows all parts together.

Changing the status of any part is easy. There is a process for each of the four states a part can be in. These procedures are all very similar, but each has its own unique properties, so they will be discussed separately in the following sections:

Order Parts

When an estimate is imported from an estimating system, the parts that come with each RO have no status. In other words, they are not on order, received, or anything else. As the RO enters the production process, you will need to order parts. Summit will help you keep track of which parts have been ordered, etc. On Order parts are color-coded yellow. The process of the ordering parts is easy:

1.   Log in to the System Module
2.   Click on the Jobs button
3.   Click on the Open RO's tab
4.   Find and highlight the job you want to order parts for
5.   Click on the Parts button
6.   "Tag" the parts to be ordered by putting a check in the "Tag" box for each part

7.   Drag ONE of the "tagged" parts up to the On Order tab. When the mouse pointer turns into a pointer with a blank sheet of paper attached to it, release the mouse button

8.   The Parts Order window will appear. Fill in the needed information (i.e. Vendor, Order Date, etc.) and click OK

9.   PO Notes are preset in the Administration Module, but can be added on the fly. If the note does not already exist in your preset list when you click OK, a window will appear and ask if you want to add the note to your presets. Click Yes if you want to add the note, or click No if you don't

10.   The ordered parts will then be colored yellow in the (All Parts) tab, have "On Order" status and appear in the On Order tab

Viewing a Single Parts Order

Summit allows you to view all the parts on a single parts order. To do this:

1.   Log in to the System Module
2.   Click on the Jobs button
3.   Click on the Open RO's tab
4.   Find and highlight the job you want to order parts for
5.   Click on the Parts button
6.   Click the PO button located in the utility toolbar above the list of parts
7.   Find and highlight the parts order you would like to view
8.   Click the Save button to view that PO only
9.   To return the view to all parts orders, click the PO button, and then immediately click the Cancel button

Receive Parts

The next step in the parts management process is changing the status of ordered parts to received parts. This process is almost identical to ordering parts. Different information is required when receiving parts, but the process is essentially the same. Received parts are color-coded green.

1.   Log in to the System Module
2.   Click on the Jobs button
3.   Click on the Open RO's tab
4.   Find and highlight the job you want to receive parts for
5.   Click on the Parts button
6.   "Tag" the parts to be received (usually parts with "On Order" status) by putting a check in the "Tag" box for each part

7.   Drag ONE of the "tagged" parts up to the Received tab. When the mouse pointer turns into a pointer with a blank sheet of paper attached to it, release the mouse button

8.   The Receive Parts window will appear. Fill in all information (if you need to enter a PO #, you must enter a digit and not a letter), and click OK. Marking the invoice as COD will exclude that invoice from the Accounting Module. Note that you are not allowed to receive the parts if the invoice amount does not match the total cost of the parts that will be received. A running total of all parts tagged is located at the bottom of the window (labeled Calc'd Cost).

9.   The received parts will turn green in the (All Parts) tab, have "Received" status and appear in the Received tab

Mark Up a Part Price from Cost

Marking up a line item increases the list price of the item by a certain percentage of the original price. This allows you to essentially specify how much profit you would like on the specific line item. To mark up a line item:

1.   Log in to the System Module
2.   Click the Jobs Button
3.   Click the Open RO's Tab
4.   Find and highlight the RO which has the part you would like to mark up from the list of open RO's
5.   Click the Parts button to view the line items for the selected job
6.   Find and highlight the part you would like to mark up
7.   Right click on the highlighted line and choose Markup Line Item from Cost
8.   The Markup Line Item window will appear. Select the percentage you would like to mark the line up and click Save
9.   The List Price for the part will be increased by the selected percentage

Backordered Parts

At times, parts will be backordered. Summit allows you to keep track of these backordered parts in the Parts button. These backordered parts are color-coded blue in the (All Parts) tab. The following steps will walk you through backordering parts:

1.   Log in to the System Module
2.   Click on the Jobs button
3.   Click on the Open RO's tab
4.   Find and highlight the job you want to mark as backordered
5.   Click on the Parts button

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6.   "Tag" the parts to be backordered (parts with "On Order" status or no status only) by putting a check in the "Tag" box for each part
7.   Drag ONE of the "tagged" parts up to the Back Ordered tab. When the mouse pointer turns into a pointer with a blank sheet of paper attached to it, release the mouse button
8.   The back ordered parts will turn blue in the (All Parts) tab, have "Back Ordered" status and appear in the Back Ordered tab

Returning Parts for Credit

Credit returns are a unique issue. There are generally two reasons for returning a part: the part is no longer needed for a job (as with a total loss job) OR the part was damaged in shipping, the wrong part was sent, or some other problem has arisen. In this second case, you most likely will need to return the part and re-order the correct part. These two situations are handled differently in Summit.

If you are returning a part because the part is no longer needed (if you don't need to re-order the part), follow the next procedure. This process is very similar to the other parts management process is Summit.

1.   Log in to the System Module
2.   Click on the Jobs button
3.   Click on the Open RO's tab
4.   Find and highlight the job you want to return for credit
5.   Click on the Parts button
6.   "Tag" the parts to be return for credit (parts with "Received" status only) by putting a check in the "Tag" box for each part
7.   Drag ONE of the "tagged" parts up to the Credit Return tab. When the mouse pointer turns into a pointer with a blank sheet of paper attached to it, release the mouse button
8.   The Part Processing window will appear. Select Return Only. Choose a reason for the return from the drop down menu and put a check mark in the "Part has been picked up" checkbox if the part has been picked up (you can mark a returned part picked up in the Parts List section).
9.   Click Save when you are finished
10.   The credit returned parts will turn red in the (All Parts) tab, have "Credit Return" status and appear in the Credit Return tab

Return and Re-Order a Part

As stated, returning and re-ordering a part is handled differently than conventional credit returns. Summit was designed with an easy way to return and re-order needed parts. The procedure below will describe the process:

1. Log in to the System Module
2. Click on the Jobs button
3. Click on the Open RO's tab
4. Find and highlight the job you want to return for credit
5. Click on the Parts button
6. "Tag" the part to be returned and reordered (parts with "Received" status only).
7. Click on the Return and Re-order button located in the utility toolbar
8. The Returning: window will appear. Choose a reason for the return from the drop down menu and click Save
9. The part is then marked as "On Order" and a copy is credit returned

OR

1. Log in to the System Module
2. Click on the Jobs button
3. Click on the Open RO's tab
4. Find and highlight the job you want to return for credit and reorder
5. Click on the Parts button
6. "Tag" the parts to be return for credit (parts with "Received" status only) by putting a check in the "Tag" box for each part
7. Drag ONE of the "tagged" parts up to the Credit Return tab. When the mouse pointer turns into a pointer with a blank sheet of paper attached to it, release the mouse button
8. The Part Processing window will appear. Select Return/ReOrder.
9. Choose a reason for the return from the drop down menu and put a check mark in the "Part has been picked up" checkbox if the part has been picked up (you can mark a returned part picked up in the Parts List section).
10. Click Save when you are finished
11. The credit returned parts will turn red in the (All Parts) tab, have "Credit Return" status and appear in the Credit Return tab

Receiving Credit for Parts Returned

After returning parts, you will eventually need to post credit memos. This process is very easy:

1. Log in to the System Module
2. Click on the Jobs button
3. Click on the Open RO's tab
4. Find and highlight the job you want to receive a Credit Memo
5. Click on the Parts button
6. "Tag" the parts to be return for credit (parts with "Received" status only) by putting a check in the "Tag" box for each part
7. Drag ONE of the "tagged" parts up to the Credit Return tab. When the mouse pointer turns into a pointer with a blank sheet of paper attached to it, release the mouse button
8. The Part Processing window will appear. Select Credit Memo.
9. Choose a reason for the return from the drop down menu and put a check mark in the "Part has been picked up" checkbox if the part has been picked up (you can mark a returned part picked up in the Parts List section).
10. Click Save when you are finished
11. The credit returned parts will turn red in the (All Parts) tab, have "Credit Return" status and appear in the Credit Return tab

Note that if tax was included in the original vendor invoice, the tax will also be credit returned.

Printing Labels

The Labels button prints three different labels (at the same time): a) standard parts label, b) Vendor Parts Labels and c) credit memo labels. These labels need to be printed to a thermal label printer like Seiko Smart Label Printer. To print these labels:

1. Log in to the System Module
2. Click the Jobs button
3. Click the Open RO's tab
4. Find and highlight the job for which you would like to post credit memos
5. Click the Parts button
6. Click the Labels button
7. A Print Preview window will appear. To print the labels, click the Print button in the upper left corner of the window

Deleted Parts

Deleted parts are parts that have been removed from the original estimate (in your estimating system). This feature is primarily for those who choose to implement Business Rule #28 (Disable Automatic Credit Returns). If you remove parts from the estimate in the estimating system, export the changes and then synchronize the repair order, all parts that have been removed will be marked as Deleted Parts. Note that deleted parts are not included in Parts totals.

Transferring Cost from One Part to Another

You may find you need to manually enter a part into Summit before you actually write and import a supplement from your estimating system. This might happen if you need to order supplemental parts for a job right away, and can't until the estimator writes and imports the supplement. The manually entered part might act as a placeholder so you don't loose track of the part, even though you may not have cost information for the part. Eventually, however, the estimator will write the supplement and import the supplement into Summit. There will then be duplicate parts in the system: the manually entered part, and the part imported from the estimating system. The costing information can be transferred from one part to the other by following the steps below:

1.   Log in to the System Module
2.   Click on the Jobs button
3.   Click on the Open RO's tab
4.   Find and highlight the job you want to transfer parts costs on
5.   Click on the Parts button
6.   In the (All Parts), "tag" the part you want to transfer cost to by checking the box in the "Tag" column for the part
7.   Highlight the part you want to transfer cost from
8.   Click the Transfer Cost button located in the utility toolbar
9.   A confirmation window will appear. Click Yes to continue, or No to cancel
10.   The part cost will be transferred. Another confirmation window will appear and ask if you want to delete the old line. Click Yes to delete the old line, or No to continue without deleting the line

Printing Reports from the Parts Button

There are several parts reports available from the Parts button. These reports pertain to the currently selected RO ONLY (to find reports pertaining to parts for all RO's, see the Parts tab in the Reports button). Each tab in the Parts button has relevant reports to that tab (i.e. The Received tab has reports about received parts for that RO.

The following reports are available:

1.   (All Parts) – Parts Status Report, Parts List
2.   On Order – Parts Order, Parts Labels, Laser Label Sheets (Avery #5162), Vendor Parts Labels
3.   Received – Parts Invoice History, Vender Parts Labels+
4.   Credit Returns – Credit Memo, Credit Return Labels

To access and print these reports:

1.   Log in to the System Module
2.   Click on the Jobs buttons
3.   Click on the Open RO's tab
4.   Find and highlight the job for which you would like to print parts reports
5.   Click on the Parts button
6.   Click the tab from which you would like to print report(s)
7.   Click the Print button located in the utility toolbar (looks like a printer). If you selected the Received Tab, you will be asked to specify a Purchase Order (PO) number. Enter the desired PO number, or 0 for all PO's
8.   The Print window will appear. Select the report or reports you would like to print by placing a check in the checkbox next to the report(s). Click the Print button to preview the report(s)
9.   The Report Preview window will appear. Verify the report(s) are correct and click the Print button located in the upper left corner of the window (looks like a printer)
10.   The report(s) will be printed.

Job Costs Button

Job costing is an important part of any business, especially in the Collision Repair Business. A powerful job-costing tool can help any shop owner or manager understand where money is made or lost, and how to improve profitability. Summit's Job Costs button is just such a tool. The Job Costs button allows you to view vendor and labor costs separately, manually add or adjust job costs and analyze costing data.

The Job Costing button contains four tabs, dividing cost information into the following categories: Vendor Costs, Flag Labor, Timesheets, and Analysis. The first three show you all posted costs in each category and allows you to manually enter additional costs. The last tab, Analysis, gives a detailed breakdown of all cost categories (labor type, paint materials, parts, etc.), and shows a percentage margin. These categories will be discussed separately in the following sections.

Vendor Costs Tab

This tab naturally shows all posted vendor invoices for the selected RO. These include all parts invoices automatically posted when parts are received. You can also edit previously posted invoices, add new costs, and reverse line costs.

Manually Enter Vendor Costs

To manually enter vendor costs, follow the procedure below:

1. Log in to the System Module
2. Click on the Jobs Button
3. Click on the Open RO's tab
4. Find and highlight the RO you want to post invoices for
5. Click the Job Costs button
6. Click the Vendor Costs tab
7. Click the New button located in the utility toolbar (looks like a sheet of paper)
8. The Vendor Invoice window will appear. Fill in all needed information (i.e. Vendor, Amount, etc.) and click Save. The new cost will appear at the bottom of the list

Edit Existing Costs

Use the following process to edit vendor costs that have already been posted:

1.   Log in to the System Module
2.   Click on the Jobs Button
3.   Click on the Open RO's tab
4.   Find and highlight the RO for which you want to edit invoices
5.   Click the Job Costs button
6.   Click the Vendor Costs tab
7.   Click the Edit Current Cost button located in the utility toolbar (looks like a pencil w/ a sheet of paper). If the cost was posted today, you will not need a password to edit it. However, if the cost was posted before today, you will need to use the administration password to edit the record. If you need to, enter the password and click OK
8.   The Vendor Invoice window will appear. Fill in all needed information (i.e. Vendor, Amount, etc.) and click Save. The change will be made in the list

Deleting a Cost

An automatically or manually posted vendor cost can be deleted using the Delete Cost button located in the utility toolbar (looks like a red "X"). To delete a cost, follow this procedure:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Find and highlight the RO for which you would like to delete a cost
5.   Click the Job Costs button
6.   Click the Vendor Costs tab
7.   Find and highlight the cost you would like to delete. When you have highlighted it, click the Delete Cost button.
8.   The Admin Rights Required window will appear. Enter the administration password and click OK
9.   The Warning window will appear. If you are sure you would like to delete the cost, click Yes. The cost will then be deleted

Reverse a Cost Entry

You may encounter a situation when you need to reverse a cost entry (change it from positive to negative and vice versa). Summit makes this easy with the Reverse Entry button located in the utility toolbar. This will add a cost entry that is the negative amount of the highlighted entry. For example, if you have a $120 vendor cost, the Reverse Entry function will add a -$120 entry, thus canceling the highlighted entry. This is useful when dealing with returned parts. Here's how to use this function:

1. Log in to the System Module
2. Click the Jobs button
3. Click the Open RO's tab
4. Find and highlight the RO for which you would like to reverse a cost
5. Click the Job Costs button
6. Click the Vendor Costs tab.
7. Find and highlight the cost you would like to reverse from the list
8. Click the Reverse button located in the utility
9. A confirmation window will appear. If you are sure you would like to reverse the selected entry, click Yes
10. The reverse cost of the highlighted entry will be added to the end of the list

Category Costing Subtotals

You can find the cost subtotals for all vendor invoices for the selected job by clicking the Totals button located in the utility toolbar. This will open the Vendor Cost Totals by Cost Center window showing a breakdown of costing by cost center (i.e. New Parts, Used/LKQ Parts, etc.). To close the window, simply click the "X" in the upper right corner of the window.

COD Invoices

The COD option (checkbox in each row in the Vendor Costs tab) excludes that invoice from the Accounting Module. It is assumed that you have already paid for the invoice (cash on delivery), so there is no need to export the invoice to your accounting module.

Flag Labor Tab

The Flag Labor tab is identical to the Vendor Costs tab, but deals with labor costs of flat rate or commission technicians (labor for hourly techs is handled in the Timesheets tab). You will be able to perform the exact functions in the Flag Labor tab as you did in the Vendor Costs tab. You will be able to edit automatically flagged labor (this labor is auto-flagged as a vehicle moves through production; discussed in the Jobs button section), manually flag labor, delete existing flagged labor, and reverse a labor flag entry.

Manually Flag Labor

The following procedure will guide you through manually flagging labor:

1. Log in to the System Module
2. Click on the Jobs Button
3. Click on the Open RO's tab
4. Find and highlight the RO you want to flag labor for
5. Click the Job Costs button
6. Click the Flag Labor tab
7. Click the New button located in the utility toolbar
8. Enter necessary information (i.e. Technician, Hours, etc.) and click Save
9. The manually entered cost will then be added

Edit Flagged Labor

The process of editing flagged labor is almost exactly like editing vendor costs. Here's how you do it: (Editing of Flagged Labor can prevent or allow by using Business Rule 30)

1. Log in to the System Module
2. Click on the Jobs Button
3. Click on the Open RO's tab
4. Find and highlight the RO for which you want to edit invoices
5. Click the Job Costs button
6. Click the Flag Labor tab
7. Click the Edit button located in the utility toolbar (looks like pencil w/ a sheet of paper). If the cost was posted today, you will not need a password to edit it. However, if the cost was posted before today, you will need to use the administration password to edit the record. If you need to, enter the password and click OK

8.   The Flag Labor window will appear. Fill in all needed information (i.e. Cost Center, Tech, etc.) and click Save. The change will be made in the list

Delete Flagged Labor

Deleting flagged labor is as easy as deleting vendor costs. The steps below will help you delete flagged labor:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Find and highlight the RO for which you would like to delete a cost
5.   Click the Job Costs button
6.   Click the Flag Labor tab
7.   Find and highlight the cost you would like to delete. When you have highlighted it, click the Delete Cost button.
8.   The Admin Rights Required window will appear. Enter the administration password and click OK
9.   The Warning window will appear. If you are sure you would like to delete the cost, click Yes. The cost will then be deleted

Category Costing Subtotals

You can find the cost subtotals for all vendor invoices for the selected job by clicking the Totals button located in the utility toolbar. This will open the Flagged Labor Totals window, showing a breakdown of costing by cost center (i.e. Body Labor, Detail Labor, etc). To close the window, simply click the "X" in the upper right corner of the window.

Timesheets Tab

The Timesheets tab keeps track of all hourly technician posts. This applies to automatically posted hourly labor via Summit's integrated time clock, and manually posted hourly labor in the Timesheets tab. This tab is identical to the Flag Labor tab, but deals exclusively with hourly labor.

Manually Enter Timesheet Entries

The following procedure will guide you through manually posting timesheet entries:

1.   Log in to the System Module
2.   Click on the Jobs Button
3.   Click on the Open RO's tab
4.   Find and highlight the RO you want to flag labor for
5.   Click the Job Costs button
6.   Click the Timesheets tab
7.   Click the New button located in the utility toolbar
8.   The Tech Timesheet Entry window will appear
9.   Enter necessary information (i.e. Technician, Hours, etc.)
10.   You can force all or a portion of the hours to be considered overtime. To do this, simply enter the number of hours you would like to force to overtime in the Force Overtime field
11.   Click Save to enter the timesheet
12.   The manually entered cost will then be added

Edit Timesheet Entries

The process of editing timesheet entries is exactly like editing vendor costs. Here's how you do it:

1.   Log in to the System Module
2.   Click on the Jobs Button
3.   Click on the Open RO's tab
4.   Find and highlight the RO for which you want to edit invoices
5.   Click the Job Costs button
6.   Click the Timesheets tab
7.   Click the Edit button located in the utility. If the cost was posted today, you will not need a password to edit it. However, if the cost was posted before today, you will need to use the administration password to edit the record. If you need to, enter the password and click OK
8.   The Tech Timesheet Entry window will appear. Fill in all needed information (i.e. Tech, Cost Center, Hours, etc.) and click Save. The change will be made in the list

Delete Timesheet Entries

Deleting flagged labor is as easy as deleting vendor costs. The steps below will help you delete flagged labor:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Find and highlight the RO for which you would like to delete a cost
5.   Click the Job Costs button
6.   Click the Timesheets tab
7.   Find and highlight the cost you would like to delete. When you have highlighted it, click the Delete button.
8.   The Admin Rights Required window will appear. Enter the administration password and click OK
9.   The Warning window will appear. If you are sure you would like to delete the cost, click Yes. The cost will then be deleted

Category Costing Subtotals

You can find the cost subtotals for all vendor invoices for the selected job by clicking the Totals button located in the utility toolbar. This will open the Timesheet Totals window, showing a breakdown of costing by technician. To close the window, simply click the "X" in the upper right corner of the window.

Enter Multiple Timesheet Entries for One Technician

Summit allows you to enter multiple timesheet entries for a single technician. This requires the RO number for each RO the technician worked on in the given period. To enter multiple entries for one technician:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Find and highlight the RO for which you would like to enter multiple timesheet entries
5.   Click the Job Costs button
6.   Click the Timesheets tab
7.   Click the Multiple button located in the utility toolbar (looks like several sheets of paper stacked on top of each other)

8.	The Tech Timesheet Entry window will appear. Enter the RO number for the first RO for which you would like to enter timesheet entries. Enter the technician, cost center and times (or hours) for the timesheet entry

9.	After you have entered all information for the first entry, click the Next button on the right side of the window. This will record your first entry and start a blank window for the next entry.

10.	Repeat this for all entries. When you have finished the last entry, click Save instead of Next. This will close the Tech Timesheet Entry window and show you the list of all entries made during the session. You may then double check your entries and correct any mistakes in the list. To make corrections simply click on the line you would like to change and click the Edit button located in the utility toolbar

11.	To finish and disperse the timesheet entries to the correct RO's simply move out of the Timesheets tab

Note that, unlike most procedures in Summit, this procedure does not necessarily pertain to the selected RO.

Analysis Tab

The Analysis tab is designed to help shop owners and manager's breakdown job costing into different categories to identify profitable and wasteful business processes. It also helps ensure that all costs are accounted for before continuing or closing a job. The Analysis tab lists part and labor types, along with cost, profit and profit percentage for each. The Analysis tab also allows you to cost paint materials, shop supplies, and hazardous waste removal.

Costing Paint Materials, Hazardous Waste Removal, and Shop Supplies

As ROs move through production and near completion, you will want to account for material costs. Your costing data will not be accurate if you do not. Summit lets you cost paint materials, hazardous waste removal and shop supplies from the Analysis tab. Follow the procedure below to cost these items:

1.	Log in to the System Module
2.	Click on the Jobs button
3.	Click the Open RO's button
4.	Find and highlight the RO you would like to cost Hazardous Materials, Shop Supplies and Paint Materials for
5.	Click on the Job Costs button
6.	Click the Analysis tab

7.   The amounts for Hazardous Waste, Shop Supplies and Paint Materials in the cost column are blue. Click the blue amount you would like to cost

8.   The Calculate window will appear. Choose a percentage of income to cost and click Save

9.   The cost will then appear in the Analysis tab and the Vendor Costs tab

Media Button

The Media button organizes all digital images associated with the selected RO. This includes pictures taken with digital cameras or scanned in with a scanner. It also includes scanned vendor invoices and other paperwork you would like to have available with the RO. This saves time and money, and helps RO-related information stay consolidated.

Add an Image from a Disk

Adding an image from a floppy disk or hard drive is easy. This allows you to take images with a digital camera, download the images to your hard drive or floppy disk, and then import them to Summit. After you have downloaded the images to a floppy disk or hard drive, follow the instructions below to import them to Summit:

1.   Log in the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Find and highlight the RO for which you would like to import images
5.   Click the Media button
6.   Click the Add button located in the utility toolbar (looks like a sheet of paper)
7.   The Open window will appear. Find the file in the directory listing that you would like to import into Summit. When you have chosen the file, click Open.
8.   The image will then appear in the Images area

Add a Scanned Image

Summit also lets you import images from a scanner. This includes images as well as documents. The instructions below assume your scanner has been properly configured. Be sure that all needed drivers are installed and that the scanner is functioning properly. The instructions below will walk you through scanning an image into Summit:

1.   Log in to the System Module

2.	Click the Jobs button
3.	Click the Open RO's tab
4.	Find and highlight the RO for which you like to scan images
5.	Click the Media button
6.	Make sure the image or document you would like to scan is in the scanner and then click the Add button
7.	Select the scanning device from the Source window that appears and click Select
8.	Your scanning software will scan the image and the image will be imported into Summit

Copy an Image to a Floppy Disk

In the event that customers, insurance companies or other concerned parties need an image or images related to a specific RO, images can be copied from Summit to a floppy disk. The following steps will help you copy an image to a disk:

1.	Log in to the System Module
2.	Click the Jobs button
3.	Click the Open RO's tab
4.	Find and highlight the RO for which you would like to copy images to a disk
5.	Click the Media button
6.	Find and highlight the image (picture or document) you would like to copy to the floppy disk
7.	Ensure there is a blank formatted floppy disk in the floppy disk drive
8.	Click the Copy button located in the utility toolbar (looks like a sheet of paper with a red arrow pointing out from it) OR right click on the image and select Copy Image to FDD option from the menu that appears
9.	A copy Pictures window will appear asking for the path to send the image
10.	The image will then be copied to the floppy disk

Delete an Image

You may need to delete an image. Follow the short process below to delete an image:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Find and highlight the RO for which you would like to delete images
5.   Click the Media button
6.   Find and highlight the image you would like to delete
7.   Click the Delete button located in the utility toolbar (looks like a red X) OR right click on the image and choose Delete Image from the menu that appears
8.   A confirmation window will appear. Click Yes to delete the image, or No to cancel
9.   The image will then be deleted

Use an Actual Vehicle Image in the Production View

You can choose to use actual vehicle images in the Production view. This allows for easy job identification by production managers and shop owners. Here's how to choose the image you would like to use in the Production view:

1.   Log in the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Find and highlight the RO for which you would like to choose a Production view image
5.   Click the Media button
6.   Find and highlight the image you would like to use in the Production view
7.   Right click on the image and choose Use In Production

Print, Fax or E-Mail any Image

Summit gives you the ability to print any image in the system. More importantly, Summit allows you to fax or e-mail any digital image or document directly from Summit. This section assumes that Summit's integrated e-mail and fax servers have been configured correctly. Follow the instructions below to print, fax or e-mail images from Summit:

1.   Log in to the System Module
2.   Click the Jobs button

3.   Click the Open RO's tab
4.   Find and highlight the RO you would like to work with
5.   Click the Media button
6.   Find and highlight the image (picture or document) you would like to print, fax, or e-mail
7.   Click the Print button located in the utility toolbar (looks like a printer)
8.   The Print window will appear. Place a check mark in the box next to the type of image you would like to send
9.   If you are printing the image, click Print. A print preview will appear. Once you have verified that you want to print the image, click the print icon located in the upper left corner of the window
10.   If you are faxing the image, click Fax. The Fax to: window will appear. Fill in the requested information (Send Fax to: Recipient fax #, etc.) and click Save. A print preview will appear. Once you have verified that you want to send the image, click the print icon located in the upper left corner of the window.
11.   If you are e-mailing the image, click E-mail. The E-mail to: window will appear. Fill in the requested information (recipient information, etc.) and click Save. The message will then be queued on the server and sent

Printing a Photo Report

The Summit photo report prints as many images as you want on one report, with four images per page. The Photo Report includes shop and job information at the top, and can include captions for each image. To print a photo report from the Imaging button:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's button
4.   Find and highlight the job for which you would like to print a photo report
5.   Click the Media button
6.   Highlight an image you would like to appear on the photo report. Right-click on the image and choose Add Selected Image to Print List
7.   If you would like to add a caption to the image, right-click on the highlighted image and choose Show Image Preview. A small inner window will appear at the bottom of window with a preview of the image and space to enter a caption. Enter the caption and click the Save button (checkmark button below the preview). Note that the image must be added to the print list before it can be previewed.
8.   To remove an image from the print list, right-click on the image and choose Remove from Print List
9.   Repeat steps 6-8 for each image you would like to add to the Photo Report.

Note that the Photo Report can be printed from several different places in the System Module. If you would like to print the report from places in the System Module other than the Imaging button, you will need to 'create' the report from the Imaging button.

Schedule Button

The Schedule button is highlighted blue, and is the first button not directly related to the RO selected in the Jobs button. The Schedule button deals with shop and technician scheduling to help create an efficient flow of work through your shop. This button will help you schedule your shop in the most efficient manner.

There are four tabs in the Schedule button: Scheduled In, Scheduled Out, Appointments and Workload. These tabs organize scheduled activities into logic sections. The Scheduled In tab shows all work that is scheduled in for a specific date or date range. The Scheduled Out tab does the same for jobs that are scheduled out for a specific date or date range. The Appointments tab organizes scheduled appointments for Summit users. As stated, these first three tabs can be organized for a specific date or date range. They can also be organized by estimator, allowing you to view all work scheduled in or out, and all appointments for a specific estimator.

The fourth tab, Workload, is different. The Workload tab shows a calendar for a specified month, along with the number of hours scheduled for each day in that month, as well as whether or not the shop is below, at, or above capacity. This feature will help you schedule work in the most efficient manner, thus creating good workflow through your shop. This will increase profit and streamline the repair order process.

Select a Day and Date Range to View in the Schedule Button

As stated, Summit allows you to view the information in the first three tabs in the Schedule button by a specific date or date range. This means that you can view all work scheduled in and out, as well as appointments for one day, one week from the selected day, or up to eight weeks from the selected day. The following steps will help you to choose a date and date range to view in the Schedule button:

1.   Log in to the System Module
2.   Click the Schedule button
3.   Click the Scheduled In tab, Scheduled Out tab, or the Appointments tab, depending on the type of information you would like to work with
4.   Click on the day you would like to start with (the selected day will be highlighted in blue). If you would like to view a single day, click on the day you want to view. If you want to see information for an entire week, click the first day of the week you would like to view.

5.   After you have highlighted the starting day you would like to work with, select the desired timeframe you would like to work with. This is done using the dropdown menu located directly below the Schedule button. You may choose to view a single day, or up to eight weeks. This timeframe is measured from the starting date you chose in the previous step

6.   The information for the date and/or date range selected will appear. Note that if you move from the Scheduled In tab to another tab, the organization parameters (the date and date range selected) will stay the same. In other words, you only need to enter the desired date and date range once, until you want to view a new set of dates

Select an Estimator For Which to View Scheduling Information

You can also view all the information for the selected date and/or date range by estimator. This allows you to view all appointments and scheduled work for a specific estimator. Here's how to choose a specific estimator to view:

1.   Log in to the System Module

2.   Click the Schedule button

3.   Click the Scheduled In tab, Scheduled Out tab, or the Appointments tab, depending on the type of information you would like to work with

4.   From the dropdown menu located directly below the Reports button, select the estimator for which you would like to view information

5.   The information for that estimator will appear. Like selecting a date or date range to work with, you can move from one tab to another without having to re-choose an estimator every time

6.   Note that this feature can be used in conjunction with the date selection feature to view scheduling information for a specific estimator for a specific date and/or date range

Mark a Vehicle Scheduled In as Arrived

Although the Scheduling tab is used mainly as an information resource, important management procedures are also done here. One of these processes is marking whether or not a vehicle scheduled for repair is on the premises. This is done in the Scheduled In tab. All vehicles not yet on the premises are not colored. All vehicles that have arrived are marked in green. Here's how to mark that a vehicle has arrived:

1.   Log in the System Module
2.   Click the Schedule button
3.   Click the Scheduled In tab
4.   Find and highlight the vehicle you would like to mark as arrived (you may need to select a different date or date range) from the list below the three calendars
5.   Once you have highlighted the vehicle you would like to mark, click the Status button located in the utility toolbar
6.   A confirmation window will appear. Click Yes to mark that the vehicle has arrived, or No to cancel
7.   The vehicle will then appear green

Mark that a Vehicle Scheduled Out Has Been Delivered

It will also be useful to mark vehicles when they are delivered. This will help you to keep track of finished vehicles, and whether or not they are still on the premises. As with vehicles marked as arrived, vehicles that are scheduled out, but are still on the premises, are colored green. When vehicles are marked as delivered, the green highlight is removed. Follow these instructions to mark that a vehicle has been delivered:

1.   Log in the System Module
2.   Click the Schedule button
3.   Click the Scheduled Out tab
4.   Find and highlight the vehicle you would like to mark as delivered (you may need to select a different date or date range) from the list below the three calendars
5.   Once you have highlighted the vehicle you would like to mark, click the Status button located in the utility toolbar
6.   A confirmation window will appear. Click Yes to mark the vehicle as delivered, or No to cancel
7.   The green highlight will then be removed

Add an Appointment in the Appointments Tab

You may also want to schedule an appointment for an estimator or system user. This can be done from the Appointments tab. In addition, all appointments can be managed from this tab. If you need to add an appointment from the Appointments tab, follow the procedure below:

1. Log in to the System Module
2. Click the Schedule button
3. Click the Appointments tab
4. Click the New button located in the utility toolbar (looks like a blank sheet of paper)
5. A new line will be created in the list located below the three calendars. Click in the "Person" column for the new line and choose the person the appointment is for from the dropdown menu.
6. Click in the "Description" column for the new line. Type in the description of the appointment
7. Fill in the time (if any) the appointment is for
8. Click the Save button located in the utility toolbar to save the new appointment (note that if you don't click the check mark before leaving the Appointments tab, the new appointment will be erased)

Delete an Appointment in the Appointments Tab

The Appointments tab also lets you delete appointments to help you manage scheduling. This is done using the steps below:

1. Log in to the System Module
2. Click the Schedule button
3. Click the Appointments tab
4. Find and highlight the appointment you would like to delete
5. Click the Delete button located in the utility toolbar
6. A confirmation window will appear. Click OK to delete the appointment, or Cancel to not delete the appointment
7. The appointment will then be deleted

Reports Button

The Reports button offers Summit users in-depth information and analysis about the repair process and general business operations. Summit's reports offer you the ability to manage your shop more efficiently, identify improvement areas in your business, maintain customer satisfaction and loyalty, as well as focus marketing and advertisement efforts. The information available in Summit will help you save time and generate more revenue.

Summit divides the Reports button into ten sub-categories: Sales, WIP, Production, Parts, Job Costs, Labor/Payroll, Accounts Receivable, Marketing, Performance and General. These sub-categories are organized into tabs in the Reports button. This manual will give a brief description of each of these sections and the reports in each. Then it will describe how to print or otherwise use the reports.

Note: For more information, see the Report Guide.

Print One or More Summit Reports

Summit allows you to generate and print one or more reports at a time. This allows you to view several related reports at a time. The steps below will help show you how to print reports in the Reports button. The procedure works for all reports in this button:

1.   Log in to the System Module
2.   Click the Reports button
3.   Click the tab for which the report(s) you would like to print corresponds (if you want to print a Late Parts Analysis report, click the Parts tab)
4.   Place a checkmark in the box next to the report(s) you would like to print. Note that you cannot select reports from one tab and move to another tab to select additional reports. If you want to print more than one report they must be located in the same tab.
5.   Click the Print button located in the utility toolbar (looks like a printer)
6.   The Print Options window will appear. Choose the date range you would like to work with from the dropdown calendars, set other print parameters (Insurance company, etc.; most of the time these will not be changed), and click Start.
7.   The Report Preview window will appear. Ensure the information on the report(s) is/are what you want to print, and click the Print icon (looks like a printer) located in the upper left corner of the Report Preview window.
8.   The report(s) will then be printed

Exporting Reports

Summit is capable of exporting all the reports from the Reports Section. It uses the following formats; CSV (Comma Separated Value), TXT (Text File), Excel (*.xls), XML (Extensible Markup Language), and HTML (Hyper Text Markup Language) .To export a report, use the following steps:

1. Check the box to select the report
2. Click the Printer icon
3. When the print dialog screen opens select the date range if applicable
4. Select any other filter options from the same screen and click Export
5. Select the file format
6. Select the Export Path by typing in the path or use the browse button on the right of the field
7. Name the file (By default it names the file after the selected report)
8. Click Export then click OK on the confirmation screen

Summit Graphs

Included in Summit's Reports button is a series of graphs and charts designed to visually help you analyze your business process. These charts can be printed as separate reports or can be pasted into other documents. The following graphs are included in the system:

- **Insurance Company $ Sales**
- **Estimator $ Sales**
- **Insurance Company Unit Sales**
- **Estimator Unit Sales**
- **Insurance Company $ Averages**
- **Estimator $ Averages**
- **Labor Unit Sales**
- **Labor $ Sales**
- **Technician Production Hours**
- **Vehicle Make $ Sales**
- **Vehicle Make Unit Sales**
- **Vehicle Make $ Averages**
- **Job Source $ Sales**
- **Job Source Unit Sales**
- **Job Source $ Averages**
- **Postal Code $ Sales**
- **Postal Code Unit Sales**
- **Postal Code $ Averages**
- **Referral Source $ Sales**
- **Referral Source Unit Sales**
- **Referral Source $ Averages**

- **Rental Car Usage (# Jobs)**
- **City $ Sales**
- **City Unit Sales**
- **City $ Averages**
- **Ins. Co. Total Loss Units**
- **Ins. Co. Total Loss $ Sales**
- **Ins. Co. Total Loss $ Averages**

Open the Graphs and Charts Window

The Graphs and Charts window can be accessed from anywhere in the Reports button:

1.   Log in to the System Module
2.   Click the Reports button
3.   Click the Graphs button located in the utility toolbar (looks like several colored geometric shapes)
4.   The Graphs and Charts window will then appear

Display a Graph or Chart

There are several options for displaying the graphs and charts in Summit. These options include viewing information as a line graph, bar graph or pie chart. You can also choose the number of bars, points or pie sections in your graphs and charts. The following procedure will show you how to select the parameters for your graphs and charts:

1.   Log in to the System Module
2.   Click the Reports button
3.   Click the Graphs button located in the utility toolbar (looks like several colored geometric shapes)
4.   The Graphs and Charts window will appear. Select the type of graph or chart you would like to display from the dropdown menu at the top left corner of the window (an initial graph will be drawn when you select the type)
5.   Select the date range you would like to work with from the date range options menus located next to the type selection dropdown menu
6.   Select the style of graph or chart you would like to work with (bar, line or pie) from the options located in the lower left corner of the window
7.   Select the maximum number or points you would like to work with (i.e. the max number of bars or pie sections you would like to work with) from the "Max # Points" field located in the bottom middle portion of the window.
8.   Put a checkmark in the "View 3D" box next to the "Max # Points" field if you would like to view the graph or chart in 3D

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9. When you are ready to create the graph or chart, click the Draw Graph button located in the upper middle portion of the window (looks like a green circle with a white arrow) to re-draw the new graph with the parameters you selected

Copy a Graph or Chart to the Clipboard

All graphs and charts in Summit can be copied to the Clipboard for use in other documents. This allows you to use Summit graphs and charts in other documents, like business reports, etc. This is how you copy a chart to the Clipboard:

1. Log in the System Module
2. Click the Reports button
3. Click the Graphs button located in the utility toolbar (looks like several colored geometric shapes)
4. Choose the parameters and draw the graph or chart you would like to copy to the Clipboard as previously explained
5. Click the Copy Graph to Clipboard button located in the upper middle portion of the window (looks like two sheets of paper)
6. The graph will then be copied to the Clipboard and be available for you to paste into other documents

Print a Graph or Chart

You can also print any of the charts or graphs in Summit. Follow the below procedure to print any of the graphs:

1. Log in to the System Module
2. Click the Reports button
3. Click the Graphs button located in the utility toolbar (looks like several colored geometric shapes)
4. Choose the parameters and draw the graph or chart you would like to copy to the Clipboard as previously explained
5. Click the Print Graph button located in the upper middle portion of the window (looks like a printer)
6. The Tee Chart Print Preview window will appear. Choose the desired printing options for the chart or graph and click Print (located in the upper middle portion of the window)
7. The graph or chart will then be printed

Messages Button

The final System Module button is the Messages button, which allows you to compose, send and receive interoffice and Internet e-mail. This section assumes that the e-mail server has been properly set up and operating correctly. The Messages button contains four sections: Inbox/Unread, Outbox/Pending, Sent/Completed, Saved/Read.

Inbox/Unread

The Inbox contains any newly received messages. These messages can be viewed, saved, deleted or printed.

View a New Message in the Inbox

Follow this procedure to view new interoffice and e-mail messages:

1.   Log in to the System Module
2.   Click the Messages button
3.   Click on Inbox/Unread
4.   Find and highlight the message you want to view from the list of messages in the center of the window
5.   Click the Edit button located in the utility toolbar
6.   A Message window will appear. This will allow you to view the new message. NOTE that this will also allow you to edit the new message, so be careful to only change things you really want to change
7.   When you are finished with the message, click Save to close the Message window. Follow steps 4-7 to view additional Messages

Save a New Message

New messages can be saved for future reference or use. Saved messages will be stored in the Saved tab so they can be accessed at any time. To save a new message:

1.   Log in to the System Module
2.   Click the Messages button
3.   Click on Inbox/Unread
4.   Find and highlight the new message you would like to save
5.   Click the Save File button located in the utility toolbar
6.   The message will then be saved and moved to Saved/Read

Reply to a Message

To reply to a message, you have received:

1.   Log in to the System Module
2.   Click the Messages button
3.   Click on Inbox/Unread or Sent/Completed
4.   Find and highlight the message you would like to reply to
5.   Click the Reply button located in the utility toolbar
6.   A new message window will appear. Fill in the appropriate information for your reply
7.   Click Save to send the message

Delete a New Message

To delete a new message in your Inbox:

1.   Log in to the System Module
2.   Click the Messages button
3.   Click on Inbox/Unread
4.   Find and highlight the message you would like to delete
5.   Click the Delete button located in the utility toolbar (looks like a red X)
6.   A confirmation window will appear. Click OK to delete the message, or click Cancel if you do not want to delete the message
7.   The message will then be deleted

Print a Message from your Inbox

You can print any of the messages in your Inbox/Unread. This gives you the option of storing a paper copy of the message as well as a copy in the Saved/Read. Here's how to print an inbox message:

1.   Log in to the System Module
2.   Click the Messages button
3.   Click on Inbox/Unread
4.   Find and highlight the message you would like to print from the list appearing in the center of the window
5.   Click the Print button and a print window will appear. Put a checkmark in the box next to "Messages" and click the Print icon
6.   The Report Preview window will appear. NOTE that all messages in the Inbox will be printed. When you are ready to print, click the Print button located in the upper left portion of the window
7.   The messages will then be printed

Outbox/Pending

This section holds all messages waiting to be sent by the server, including all interoffice and Internet e-mails. Messages are removed from this tab when they are sent. Sent messages are moved to the Sent/Completed. To edit, print or delete a message in the Outbox, follow the steps to edit, print or delete messages in the Inbox.

Sent/Completed

As stated, all messages that have been successfully sent are moved to this tab. Just as with the Outbox, messages in the Sent/Completed can be edited, printed, or deleted, but not saved. Follow the procedure for printing, editing and deleting messages found in the Inbox section of this manual.

Saved/Read

The Saved/Read is similar to the Pending and Sent/Completed tabs. The Saved/Read contains all saved messages. Just as with the Pending and Sent/Completed tabs, messages in the Saved tab can be printed, deleted or edited, but not saved. Follow the procedures in the Inbox section to print, edit or delete messages in this tab.

Compose a Message

To compose a message in Summit, follow the procedure below:

1. Log in to the System Module
2. Click the Messages button
3. Click the New icon
4. The Message window will appear. If you are sending an interoffice message, highlight the name of the person you would like to send the message to from the dropdown menu located in the "To:" field. If you are sending Internet e-mail, type the e-mail address you would like to send the message to in the "To:" field.
5. Type in a subject in the "Subject:" field if you would like one (this is not mandatory)
6. Select the type of message you would like to send (interoffice or e-mail) from the dropdown menu in the "Message Type" field
7. Type in the body of the message you would like to send in the "Message" field

8.   When you are ready to send the message, click Save (click Cancel to exit the Message window without sending the message)
9.   The message will be moved to Outbox/Pending.

"Quick Message" Feature

Summit's "Quick Message" feature allows users to skip several steps in the messaging process. This feature is accessed by clicking on the envelope located in the upper right corner of the System Module window. The envelope is located next to the Dashboard button. The "Quick Message" feature takes a user directly to the Compose window as though the user was in the Messages Button. It also adds a subject related to the currently selected RO. To use this feature:

1.   Log in to the System Module
2.   Click the Jobs button
3.   Click the Open RO's tab
4.   Select the RO for which you would like to send a related message
5.   Click the envelope located next to the Dashboard button in System Module window
6.   The Message window will appear. Follow the same procedure used to compose a message in the Messages button and click Save to send the message
Note: This is used for interoffice mail only.

TechCentral Module

Summit's TechCentral Module is an integrated time clock designed to track hourly payroll and technician efficiency. Your technicians can clock in and out of jobs, clock on and off breaks, as well as start and end shifts. These features also apply to teams, allowing you to track team efficiency as well.

The TechCentral Module helps keep your technicians connected with the estimators. Technicians can send short, user-defined messages (defined in the Administration Module) to the estimator of a specific job. This allows the technicians to receive clarification of labor, work approval, etc. in an efficient and easy manner.

Using the TechCentral Module

This section explains general operations in the TechCentral. It will describe how to navigate through the time clock, and gives a general description of how to use TechCentral Module features. This will make using the system easier and faster. NOTE that the TechCentral Module requires a dedicated machine for the time clock operations, as well as a dedicated TechCentral system user (the TechCentral has to be logged in to Summit like a human user). This may mean you will need to purchase an additional Summit user. Please contact Summit Support @ (208) 947-1738 for details.

TechCentral Module Layout

The TechCentral Module consists of five tabs or screens:

The First tab is RO List, which consists of a large clock located in the right-center portion of the window. This clock takes up the majority of the TechCentral Module window. Located to the left of the clock are several dropdown menus with information "slots" below them. These slots will be explained later. Directly below the time clock there are up to 10 buttons or as few as two.

The Second tab is Production, which consists of all the same vehicle information as does the System Modules Jobs Production View. The only live function on this screen is the sorting option.

The Third tab is History, which shows a list of hourly and flagged labor. Postings listed are based on a date range you set. The date range is set by changing the dates in the form and Through fields then click the Go button.

The Fourth tab is Internet. This tab shows web pages that are limited by settings in the Administration module.

The Fifth tab is Imaging. This screen allows the technicians to add images to the system.

The dropdown menus to the left of the clock allow you (or the technician) to choose WHO to log in, and to WHICH type of labor they want to log in to. When these are chosen, the "slots" below them will be filled with the jobs that are assigned to the selected technician for the selected labor type. For example, if John was the selected technician, and Body was the selected labor type, all jobs with Body labor assigned to John would appear in the slots below the dropdown menus.

The procedures that use these layout features will be explained in the next section.

TechCentral Procedures

As stated, there are several procedures associated with the TechCentral Module. These include clocking in to jobs as well as clocking on and off breaks or start/end of shift. You can also use the time clock to do hourly payroll. Messages from technicians to estimators can be sent with the TechCentral Module.

Create a TechCentral Module User Name and Password

As stated previously, the TechCentral Module requires an additional user. This is because the TechCentral "logs in" to the Summit DBServer just like any other user. This allows the TechCentral to send new information to the database in real-time.

You will need to set up a TechCentral "user". This is done from the Administration Module. The procedure below will help you set the TechCentral user up:

1.   Log in to the Administration Module
2.   Click the Security button located near the upper middle portion of the Administration window
3.   This will bring up a list of all system users. To add a user, click the New button located in the utility toolbar
4.   This will automatically take you to the Admin tab in the Security button. Fill in the information in the first three text fields ("Full Name", "User Name", "Password"). The user name and password will be used to log the TechCentral in to the DBServer.

5.   In the "Access Rights" area, put a checkmark in the checkbox labeled "TechCentral". Be sure that the checkmark has a white background. If it has a gray background, the system will act as though it was not checked at all

6.   In the "Access Rights" area, be sure to remove the checks from the "System", "Administration" and "Accounting" fields. This will prevent people from using the TechCentral username and password to log in to other parts of the system

7.   Click the Save button located in the utility toolbar to save the TechCentral user

Log in to the TechCentral Module

Unlike other Summit modules, the TechCentral Module will usually remain open for the entire workday. That means that you will log in to the TechCentral Module at the beginning of the day, and leave it running for the whole day so technicians and others can use it. Logging in to the TechCentral Module is easy. Here's how to do it:

1.   Click the Summit icon on your computer desktop to open the Summit log in window.

2.   Enter the TechCentral Module user name and password (see Create a TechCentral Module User Name and Password)

3.   Change the "Module" dropdown menu to "TechCentral"

4.   Click Login to log in to the TechCentral Module

5.   The TechCentral window will appear

Clock in to a Job

The most fundamental purpose of the time clock is to clock technicians in and out of jobs, thus enabling payroll functions if technicians are paid hourly, or technician efficiency tracking if technicians are paid on a commission or flat rate basis. This also enables you to do payroll for all hourly employees, not just technicians.

Summit's TechCentral assumes that your employees will always be clocked in to something (a job, break, start-of-shift, etc.), so the TechCentral Module does not have a formal "clock out" function. You will see shortly how this will save your employees a little time while using the time clock. To use the time clock:

1.   Log in to the TechCentral Module

2.   The TechCentral window will appear. TechCentral will usually stay running for the entire work day, so you will only need to do this once at the beginning of the day

3.   The person clocking in will select his/her name from the top dropdown menu to the left of the clock

4.   Then select the type of "labor" they would like to clock in to from the second dropdown menu.

5.   After selecting the Labor click the Show Jobs button.

6.   The person clocking in to the job will then need to the highlight the RO he/she would like to clock in to, and click the large "Clock In' button located below the clock

7.   The person will then be clocked in to the job

"Clocking Out" of a Job

Summit's TechCentral Module does not provide a set way to clock out of jobs. Instead, the TechCentral Module assumes technicians will always be clocked in to something. To "clock out" of a job, a technician only needs clock in to a new job (or "Break" if he is going on break; or "Lunch" if he is going to lunch, etc.).

View Current Clock Status of One or All Technicians

The TechCentral allows you to view the current status of either the currently selected technician, or view the status of all technicians in the system. To view tech status (assuming you are logged into the TechCentral module):

To view one technician

1.   To view the status of one technician, select the technician's name from the upper left corner of the time clock window.

2.   Then look to the right above the clock and you will see Tech Status:

To view all technicians

1.   Click the **Status** button (it doesn't matter which technician you have selected)

2.   Click Yes on the view status of all technicians confirmation screen.

Searching for A Specific RO

The TechCentral Module allows a technician to search for an RO by RO number. It also allows a technician to search jobs by Unit#. To do so:

1.   Select the appropriate name from the first dropdown menu (name of technician using TechCentral)
2.   Select the appropriate labor type from the second dropdown menu
3.   Click Show Jobs
4.   Click the Find RO button located to the right of the first dropdown menu. The Search for RO# window will appear. Enter in the RO # to be searched for and click OK. The RO will then be highlighted in the list IF it could be found

Clocking in to Multiple RO's at the Same Time

Summit's TechCentral allows technicians to clock into multiple jobs at the same time. Labor and time is divided evenly between all jobs that were clocked into. In other words, if a technician is clocked into three jobs at the same time, the time actually allocated by the TechCentral for each job would be total time divided by three. If a tech was clocked into three jobs at the same time for six hours, each job would be allocated two hours (6 hrs / 3 hrs = 2 hrs). To clock into multiple jobs:

1.   Log into the TechCentral as normal.
2.   Before choosing a vehicle to log into, the tech needs to click the Multi-Select button located just below the list of all RO's available to clock into
3.   The appearance of the list will change, and a TAG column will appear
4.   To clock into multiple RO's the person clocking in should "tag" each of the jobs to clock into by putting a check mark in the "TAG" column for each job to clock into
5.   The person can now click the Clock In button as normal
6.   When the technician clocks into the next RO(s), he/she will automatically be logged out of the RO's they were working on

Clocking Out of One of Many Jobs

Summit will also allow a technician to clock out of one of the multiple jobs that the technician is clocked into. There are two ways to do this, both of which are described below:

1.   Assuming you are clocked into the TechCentral, select the technicians name from the list of available technicians.
2.   The technician can clock out of one job by:
       a.   Highlighting the job, they would like to clock out of in the list of jobs below the tech's name and clicking the Out button (located next to the large Clock In button). This will take the tech through the normal clock-out process
       b.   Select the next item(s) to clock into and press the Clock In button. A dialogue will appear asking if you would like to clock out of a job the selected tech is clocked in to. One dialogue will appear for each job clocked in to. Click Yes if you want to clock out of the job, or No if you would like to remain clocked on the job

See the Production View from the TechCentral

Technicians can see (but not edit) the Production View from the TechCentral Module. This allows them to see exactly where all jobs assigned to them are at any given point. Note again that this Production View is read only and cannot be directly affected from the TechCentral Module.

To see the Production view (the TechCentral should already be logged on)

1.   Select the appropriate name from the first dropdown menu (Technician name)
2.   Select the desired labor type for that technician from the second dropdown menu
3.   Click the Production tab located at the bottom left of the screen. The Production view will then appear

Move a Vehicle Through Production from the TechCentral

Technicians can be allowed to move the vehicles they are working on to the next production department in Summit. Business Rule #42 must be checked to allow this. If Business Rule #42 is checked, then technician can be allowed to move the vehicle to the next department in the Production View. This will appear when the technician clocks into a new job. The process is like the normal process, except for the following changes:

1. When logging out of an RO, the Move Vehicle to New Department window will appear

2. If the tech is a commission or flat rate tech, a checkbox labeled "Check this box to flag labor" will be visible (this will not be visible if the tech is paid hourly). The tech should put a check in this box if he wants to be flagged the labor from the current department. The vehicle must be moved to the next department for the flagging to work

3. If the vehicle needs to be moved to the next department, the tech simply needs to click, drag and drop the vehicle to the next department. A window will appear asking the tech to confirm the action.

4. If the tech is clocking into another job, a similar window will appear. The tech can choose any of the previous options, but will probably just click the Next button (located in the lower right corner with the right arrow on it) to clock into the job

View Technician Time Clock / Labor History

Technicians and other employees can see their personal time clock and/or flagged labor history. This shows all timesheet entries and flagged labor for a selected date range.
To use this feature (the Time Clock should already be logged on):

1. Select the appropriate name from the first dropdown menu (Technician name)

2. Select the desired labor type for that technician from the second dropdown menu

3. Click the History tab located at the bottom left of the screen. The Time Clock / Labor History window will then appear.

4. To view data, select a from and Through date from the dropdown calendars at the top of the window and click the Go button, also located at the top of the window.

5. Now select either the Timesheet Entries or Flagged Labor button below the date range dropdowns. This will display the information selected

Edit Non-RO Related Timesheet Entries

You can edit non-RO related timesheet entries from the TechCentral. This requires the Admin Password. To do this:

1. Log in to the TechCentral
2. Select the tech for which you would like to edit a timesheet entry from the first drop down menu
3. Right click on the Status button located just to the right of the first drop down (has a question mark on it)
4. Enter the password in the window that appears
5. The Time Entries window will appear.
6. Make the necessary changes and click the Save button to save your changes. Close the Time Entries window when you have finished

Accessing the Internet from TechCentral

Technicians are allowed to access websites set up in the Administration Module (See Other button | TechLinks Tab). To access the Internet:

1. Select the appropriate name from the first dropdown menu (Technician name)
2. Select the desired labor type for that technician from the second dropdown menu
3. Click the Internet tab located at the bottom left of the screen.
4. The list of available websites will be listed in the left portion of the window. To view a website, click one of the links. The web page will appear in the main part of the window.

Send a Message (to the Estimator, Production Manager, and Parts Manager)

At times it may be necessary for technicians to get clarification, approval, etc. from the estimator, production manager, or the parts manager. This can easily be done from the TechCentral Module. To do this (this assumes that the time clock has been started for the day and that the person sending the message has started his/her shift):

1. Select the appropriate name from the first dropdown menu
2. Select the desired labor "type" from the second dropdown menu and click Show Jobs. The list of all RO's with the selected labor type assigned to the person sending the message will appear below the two dropdown menus
3. Highlight the RO for which you would like to send a message from the list located below the two dropdown menus

4.   Click the estimators name for the highlighted RO (the estimators name is highlighted in blue)
5.   The Send Message to Estimator window will appear. Choose a message from the dropdown menu located in the center of the window. Choose whether to send the message to the estimator or production manager.
6.   Click Save to send the message. The message will then be sent

View Job Lines from the TechCentral

It may also be convenient for technicians to be able to view the job line they are assigned to. Summit's TechCentral Module makes this possible. Technicians may also view job lines assigned to them PLUS all unassigned job lines. To view job lines from the TechCentral Module (this assumes that the time clock has been started for the day and that the person sending the message has started his/her shift):

1.   Select the appropriate name from the first dropdown menu
2.   Select the desired labor "type" from the second dropdown menu and click Show Jobs. The list of all RO's with the selected labor type assigned to the person sending the message will appear below the two dropdown menus
3.   Highlight the RO for which you would like to view job lines from the list located below the two dropdown menus
4.   Click the RO number for the highlighted RO (the RO# is highlighted in blue)
5.   The Job Line Items window will appear. Click the "My Assignments" button to view only lines assigned to the selected technician. Click the "Mine + Unassigned" button to view lines assigned to the selected technician, plus any unassigned line items
6.   This list can be printed in the form of a job worksheet. To print the worksheet, click the Print button located in the middle of the Job Line Items window (looks like a printer). The print preview will then appear. Click the print button in the upper left corner of the print preview to print the worksheet
7.   You can also add short line notes to the line items. To do so, find and highlight the line item for which you would like to add a line note. Then click the Notes button located in the utility toolbar of the Job Line Items window. The Note window will then appear. Type the note in the space provided and click Save to save the note. Pre-set notes may also be added.
8.   When you are finished viewing the job lines, close the window by clicking the "X" in the upper right corner of the window

Find Out if the Selected Technician is Clocked In to a Job

It will certainly be useful for those using the time clock to be able to find out what job they are clocked in to before they clock in to another job. This is especially useful because the TechCentral Module does not include a specific "log out" function. Here's how to find out which job the selected technician is clocked in to:

1. Select a technician from the first dropdown menu on the left side of the TechCentral window
2. To find out which "job" (this includes start-of-shift, break, etc.), click the Show Clocked In Status button located just to the right of the first dropdown menu (looks like a red question mark with a beige background)
3. The confirm window will popup asking if you want to View the Status of ALL Technicians Yes/No
4. A small pop up window will appear with the "clocked in" status of the selected technician ("John is CURRENTLY logged in to Start of Shift" for example)
5. Click the X in the upper right corner when you are finished with it

View the List of all RO's

Technicians can view all RO's, in addition to the ones that have labor assigned to them. To do this:

1. Select the desired technician from the first dropdown menu on the left side of the TechCentral window
2. Select the desired labor type from the second dropdown menu and click Show Jobs. The list of all RO's with the selected labor type assigned to the selected technician will appear below the second dropdown menu
3. To view all RO's (not just the ones with labor assigned to the selected tech), put a checkmark in the "All RO's" checkbox located to the right of the second dropdown menu, click Show Jobs
4. The list of all RO's will appear in the space below the second dropdown menu
5. To view only the RO's assigned to the selected technician, simply remove the checkmark from the "All RO's" checkbox and click Show Jobs

Change the Clock Display Style

Summit's time clock has three different style settings available: analog clock, digital clock, or text clock. To change the display style:

1.   Right-click on the time clock (located in the right-central portion of the TechCentral window; takes up the majority of the window)
2.   A selection menu will appear with three options: Analog Clock, Digital Clock, Text Clock
3.   Click on the desired style. The clock display style will then change to the selected style

Accounting Module

The Accounting Module is a reference source for all accounting data available in Summit. You will also use this module to export accounting data from Summit to Quick Books, Business Works, or Peach Tree. Other useful Accounting Module features include a daily business report (which shows the general business activity for a selected date) and a cash flow forecast report, (showing the jobs scheduled to close in the selected date range).

Using the Accounting Module

This section explains general operations in the Accounting Module. It will describe how to navigate through the Accounting Module and gives a general description of how to use the accounting data. This will make using the system easier and faster, as well as allows you to focus on using Summit instead of worrying about how to move through the module.

Accounting Module Layout

The Accounting Module consists of three general areas: a header toolbar that occupies the upper-most portion of the Accounting Module window, a utility toolbar, located on the left edge of the Accounting Module window (similar to the System and Administration Modules), and the table area, which occupies the majority of the Accounting Module window. The table area is where the list chosen in the header area will be displayed. Note that the general layout of the Accounting Module is very similar to the layout of the System and Administration Modules.

The header area of the Accounting Module contains an "Accounting" label in the upper left corner. Directly below the label are two dropdown date range menus, with a green circle with an arrow and a printer button immediately to the right of the dropdown menus (these menus and buttons will be described in further detail later). Below the date range dropdown menus are four buttons: A/R, A/P, Payroll and Forecast. These buttons operate much like the buttons in the System or Administration Modules in that they represent categories of information. Below these four buttons there will be one or more tabs, depending on the button chosen. These tabs represent specific information in the chosen category.

Accounting Module grid columns can be sorted just like the System Module. In other words, if you click the column header, the grid will be sorted according to the column clicked.

The utility toolbar contains useful buttons that will help you navigate through the Accounting Module, as well as handy book marking tools. You may also refresh the table data using the refresh button.

The table area is used to display the information for the chosen categories. For example, if you clicked the A/R button, and the Closed RO's tab, all closed RO's for the selected date range would be displayed in the table area. These functions, including all buttons and tabs, will be described later in the Accounting Module section.

Log in to the Accounting Module

Before you can use any information in the Accounting Module, or export accounting information to your accounting system, you will need to log in to the Accounting Module. This is very similar to logging in to the other Summit modules. You must have a valid user name and password, with access rights to the Accounting Module, to be able to log in to the Accounting Module (see the Administration Module section). Here's how to log in to the Accounting Module:

1.   Click the Summit icon located on your computer desk top to bring up the Summit login screen
2.   The Log In window will then appear. Fill in your valid user name and password, select the Accounting Module from the "Module" dropdown menu, and click Login
3.   The Accounting Module window will then appear. You can then access the information in the Accounting Module, as well as export accounting data to your accounting system.

Select a Date Range to View

Accounting information is generally associated with a certain date range. This date range might be one day, one week, one month, etc. You can specify the date range you would like to work with in the Accounting Module. This can be done anytime while in the module, but generally will be the first thing you do after logging in. To select a date range to work with:

1.   Log in to the Accounting Module
2.   Click the down arrow for the "From" dropdown menu at the top of the Accounting Module window. A calendar will drop down. Choose the date you would like the date range to start with. If you need to select a different month,

use the left and right arrows at the top of the calendar to scroll through the months

3.   Click the down arrow for the "Thru" dropdown menu located to the right of the "From" dropdown menu. A calendar will drop down. From the calendar, select the date you would like the date range to end with. Note that if want to view a single day, the "From" and "Thru" dates will be the same date.

4.   The date range has been selected. You will now need to choose the type of data you want to view

Select Information to View

The next step in using the Accounting Module is choosing the kind of information to view. There are four buttons arranged horizontally near the top of the window that represent four general categories of information to view.

A/R Button

This button represents accounts receivable information for the selected date range. There are four tabs (located below the button) associated with the A/R button: Receipts, Receivables (New RO's), Closed RO's and Scheduled In. The Receipts tab contains the information about all payments received in the given date range. The Receivables (New RO's) tab shows all RO's created in the given date range. Closed RO's naturally displays all RO's closed in the selected date range. The Scheduled In tab details the jobs that are scheduled to arrive in the date range.

A/P Button

The A/P button represents accounts payable information in Summit. There are only two tabs under the A/P button: Payables and Credit Memos. The Payables tab shows all vendor invoices posted in the date range, as well as paint materials, shop supplies and hazardous waste removal costed in the date range. The Credit Memos tab shows all credit memos for the date range.

Payroll Button

All labor flagged and timesheets posted in the date range can be found in the Payroll button. There are two tabs in the Payroll button: Flagged Labor and Timesheets. The Flagged Labor button shows all labor flagged for commission and flat-rate technicians in

the date range. The Timesheets button displays the timesheets for all hourly employees posted in the date range.

Forecast Button

The Forecast button contains only one tab: Cash Flow. This tab can be used to forecast future cash flows based on the jobs closed or scheduled out in the selected date range.

To select information to view:

1. Log in to the Accounting Module
2. Select the date range you would like to work with
3. Click the button (A/R, A/P, Payroll, Forecast) associated with the type of accounting data you would like to view
4. Click the tab (located below the buttons) associated with specific type of accounting data you would like to work with (Closed RO's, for example)
5. To actually view the data, you will need to click the Query Dates button located in the upper middle portion of the window (looks like a green circle w/ an arrow). Clicking this button will display the selected type of data for the selected date range in the table area of the window

Export Accounting Information to Your Accounting System

The most important function of the Accounting Module is exporting data to your accounting system (Quick Books, Business Works, Peach Tree). The Accounting Module allows you to export accounting information for one or many RO's from the same place. This section assumes that you have set up your export paths and account numbers correctly. Summit exports the following data: customer invoice, credit memo, vendor invoice, and customer information. To export this information:

1. Log in to the Accounting Module
2. Select the date range you would like to work with
3. Select the information you would like to view, and click the Query Dates button located in the upper middle portion of the window
4. To export CUSTOMER INVOICES, click the A/R button and then the Closed RO's tab. CUSTOMER INFORMATION is exported with the CUSTOMER INVOICE. To export VENDOR INVOICES, click the A/P button and then the Payables tab. To export CREDIT MEMOS, click the A/P button and then the Credit Memos tab.

To export A/R PAYMENTS (receipts), click the A/R button and then the Receipts tab.

5.   Put a check mark in the Set Export Path check box if you would like to specify an export path other than the default path

6.   Note that when you select one of these three options, an additional field appears in the header section of the Accounting Module window, to the right of the date range selection fields. This additional field includes an Export to Accounting button, a dropdown menu with accounting system options, a "View Non-Exported" checkbox, and Set Export Path

7.   After you have selected the type of data you would like to export (customer invoice, etc.), put a check mark in the "Tag" column in the table area for each item you would like to export. Click the "Tag" column header to tag all lines.

8.   Select the accounting system you would like to export to (Quick Books, Peach Tree, Business Works) from the dropdown menu locate to the right of the Export to Accounting button

9.   When you have selected the items you would like to export and the accounting system you would like to send the information to, click the Export to Accounting button located in the upper right portion of the Accounting Module window

10.   A confirmation window will appear asking if you want to erase the old export file and create a new one. If you click Yes, the old file will be erased and the newly exported data will replace it. If you click No, the newly exported data will be appended to the old export file.

11.   After you have clicked either Yes or No, the information for all selected items will be exported and the line(s) that were exported will be highlighted in green (green lines indicate that the information has already been exported)

Print Accounting Reports

The Daily Business Report is a consolidated report of business activity for the day. It includes receipts, payables, new RO's, closed RO's, scheduled in, and credit returns. The Forecast Report shows all closed and scheduled out RO's for the selected date range. The AP Transactions Report lists all payables and credit memos posted in the selected date range. To print these reports:

1.   Log in to the Accounting Module

2.   Select the date range you want to work with (remember, to view a single day the "From" and "Thru" dates must be the same)

3.   Click the Print button located in the upper middle portion of the Accounting Module window (looks like a printer)

4.   The Print window will appear. Put a checkmark in the checkbox next to the report(s) you would like to print (you can select all three reports) and click the Print button

5.   The Report Preview window will appear. Preview the reports and click the Print button located in the upper left corner of the Report Preview window (looks like a printer)

6.   The report(s) will then be printed