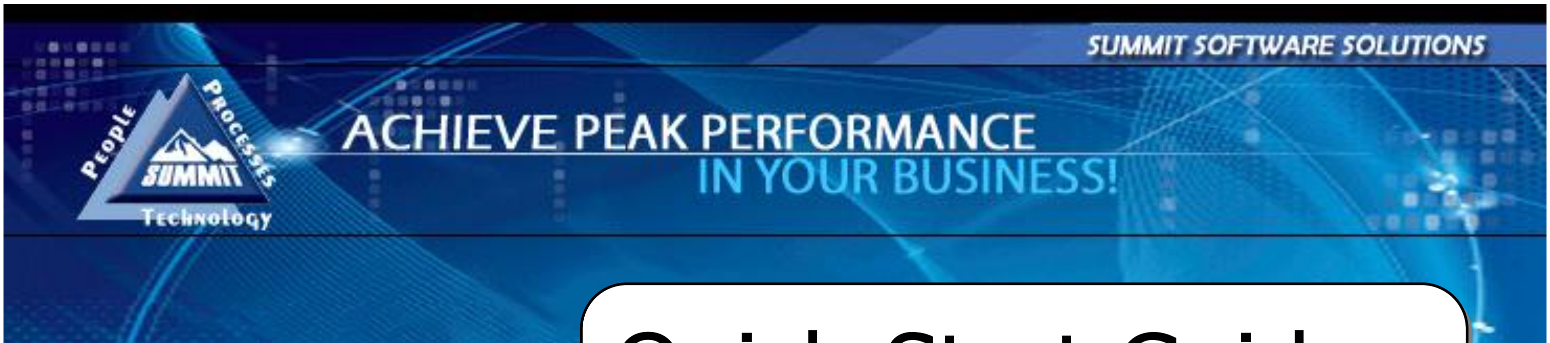


Quick-Start Guide

Training And Reference Manual

SUMMIT
Technical Support

Contents

Getting Started

Understanding the RO List View

1. Log in to Summit (System Module)

2. Open the *Open RO's* tab

3. Choose *RO List View* from *ICON choices* on the left side of the screen,

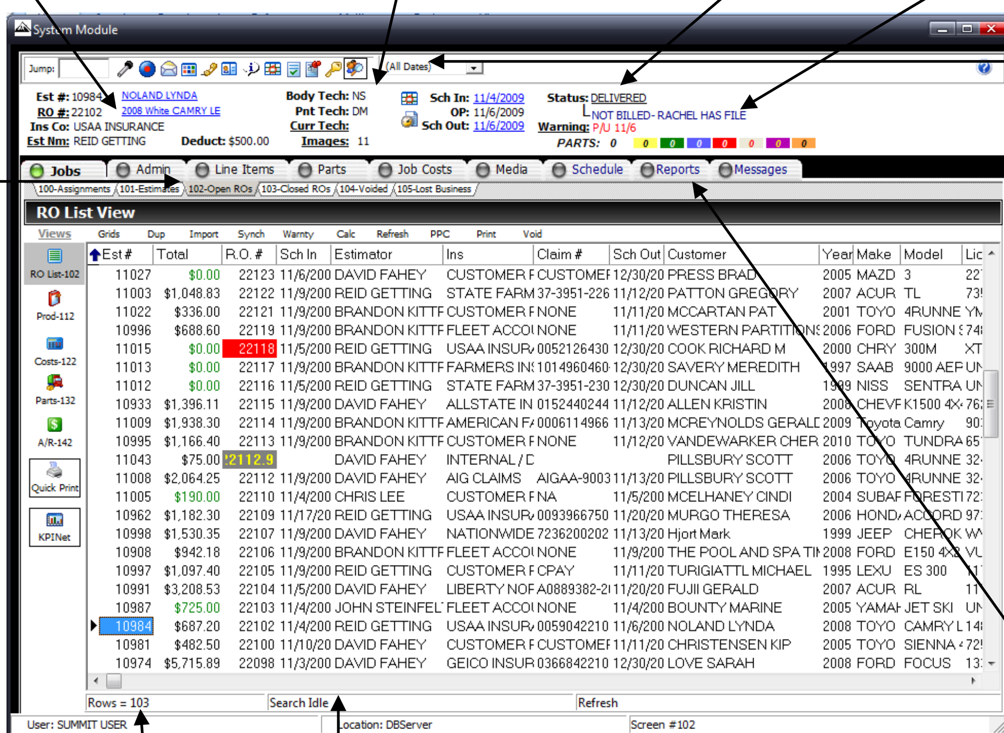
Customer, *Vehicle*, and other *RO* related information is always at the top of your screen.

Body, *Paint*, and *Current Tech*, on existing Repair Order

Scheduled *IN*, *OUT*, and (*OP*) Original Promise Dates

Vehicle Status, *Production "Warning Flag*, and *Parts Status*

Jobs, Admin, Line Items, and *Job Costs,* tabs allow you to "drill down" into selected RO's.



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

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

# of Active RO's

Search Status

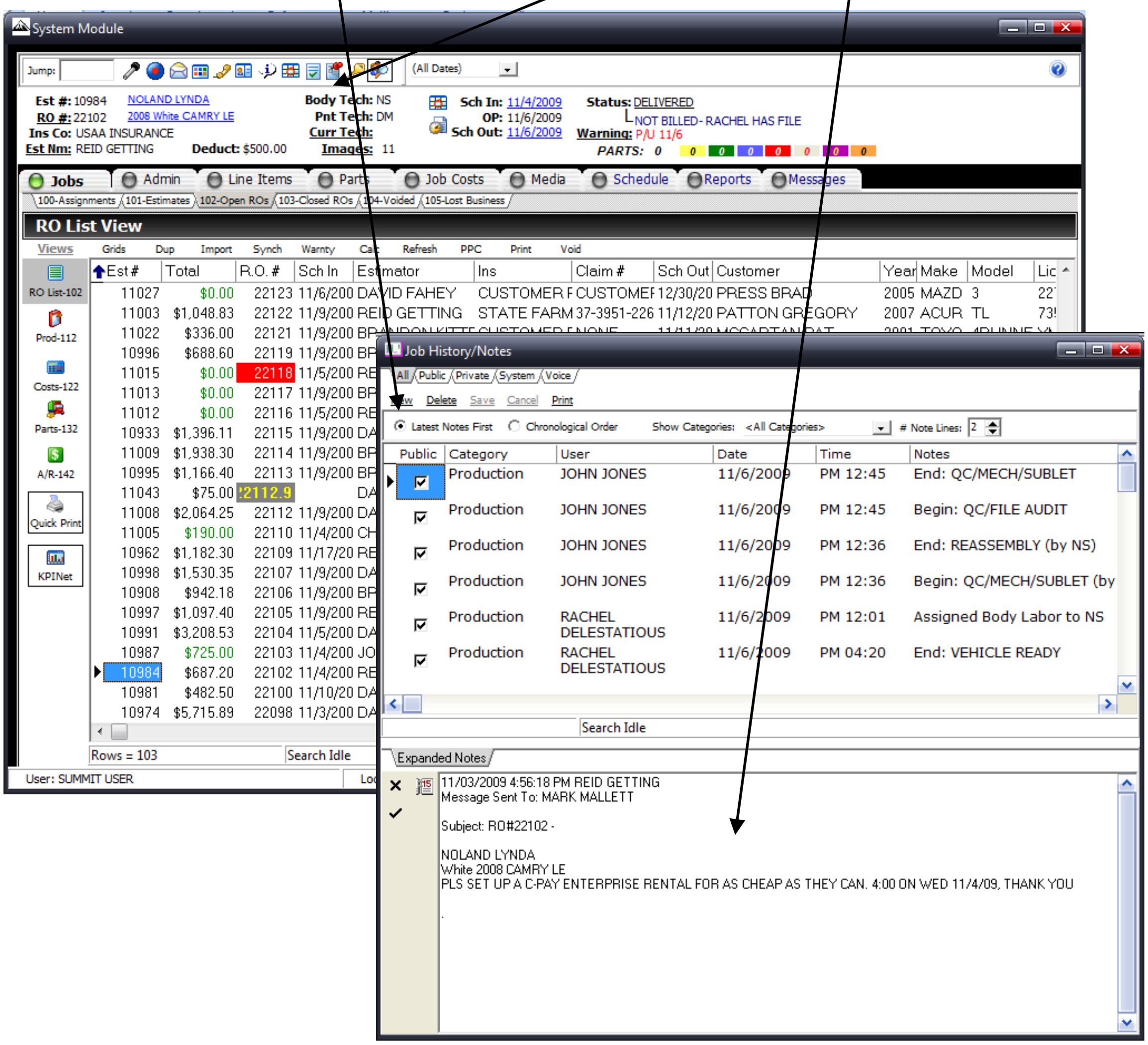
Location Log-in

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

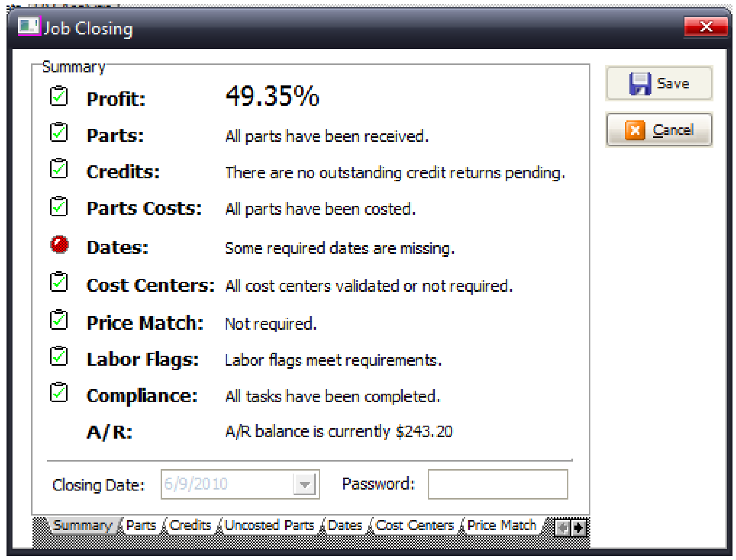
Communications

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

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



Customer Vehicle Deliveries

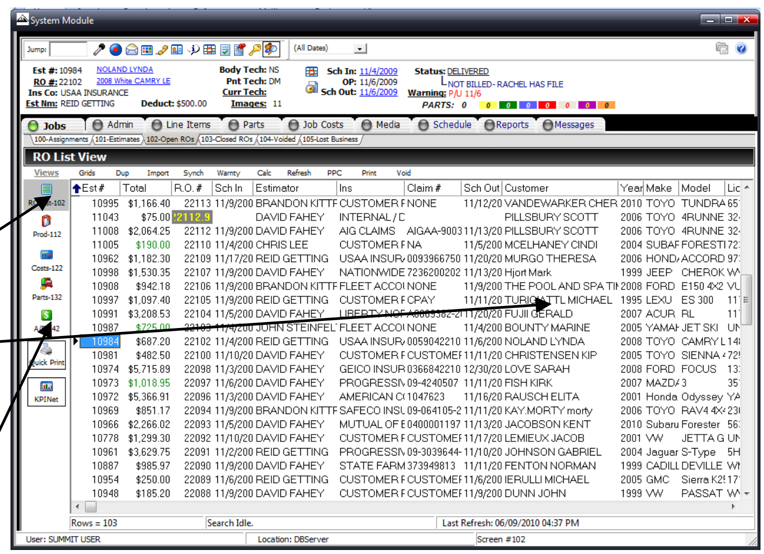


<u>NOTE</u>: Prior to delivering a vehicle the repair order file can be pre-closed.

All RO's **<u>MUST be PRE-CLOSED</u>** by the file handler/estimator prior to delivery. Pre-closed being defined as all checks in the Summit Analysis Pre-Close Screen are **GREEN.**

If there is a RED dot you should correct the RO PRIOR to delivery. (The above screen depicts an RO that **<u>is not</u>** ready to be delivered. All tasks **MUST BE COMPLETED.)**

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



Upon the arrival of the customer:

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

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

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

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

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

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

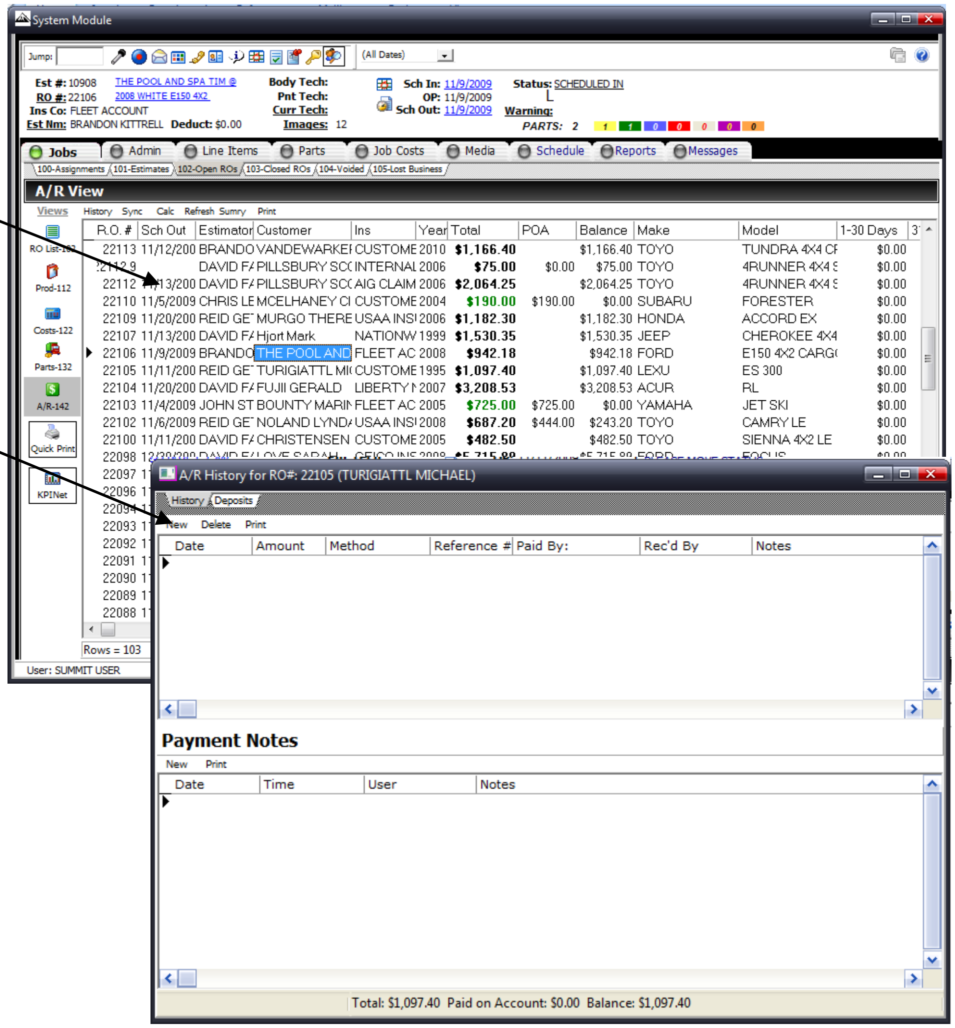
Customer Payments

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

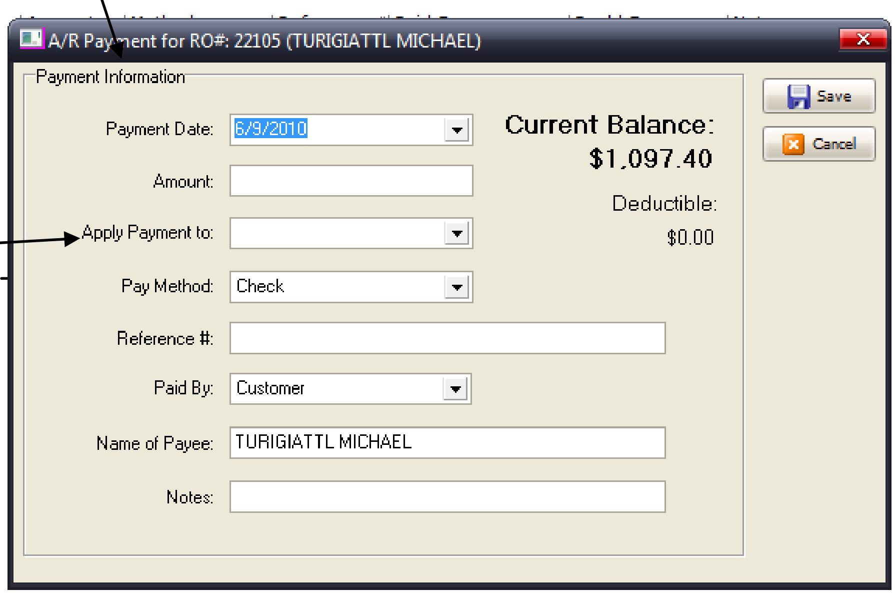
To enter a payment on a specific RO simply "double click" on the screen line and **<u>the following screen</u>** will appear:

1.Click on the *NEW ICON*

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



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



Writing an Estimate and Importing into Summit

Write an Estimate

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

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

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

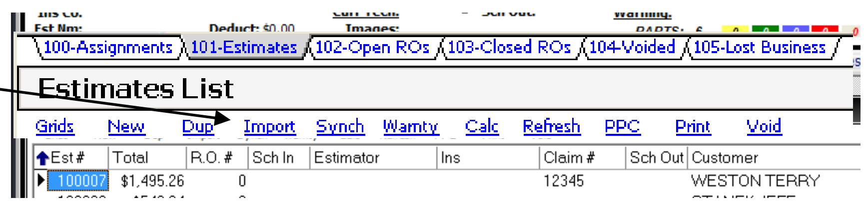
2. Create the export file in the estimating system. In ADP Select File Export, In Mitchell select save and the estimate will automatically export to the EMS folder. CCC has several different EMS export settings.

Import the Estimate to Summit

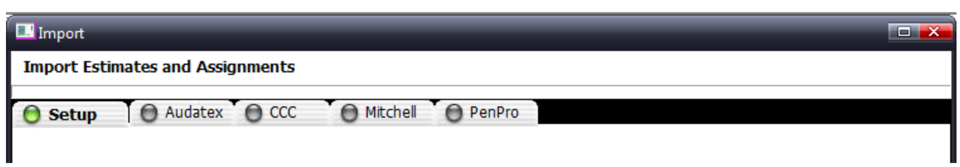
1. Log in to Summit. (System Module)

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

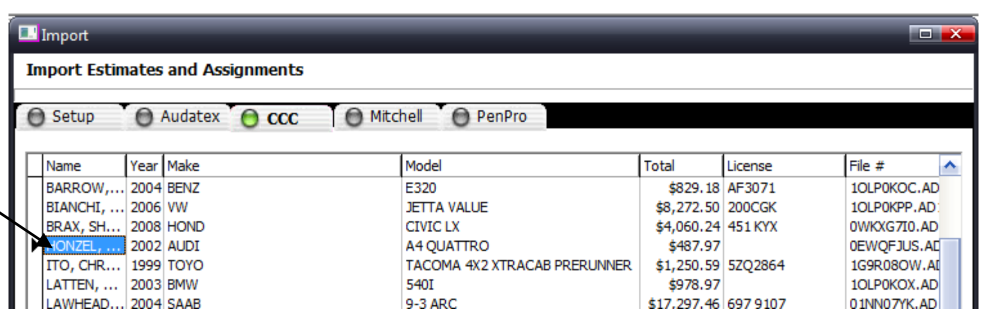
3. Click on the Import link. It is located in the tool bar on the top left side of the screen.



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

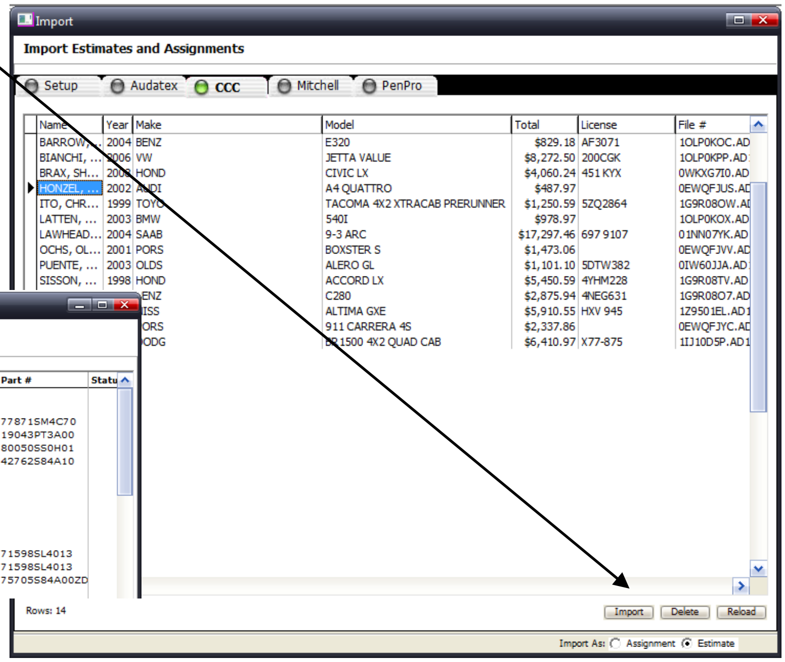


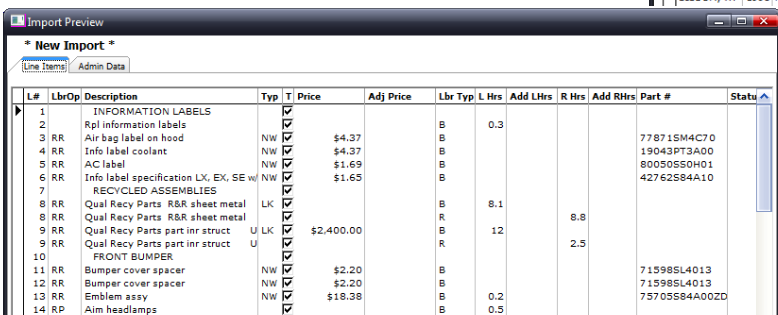
5. Choose the estimate from the list by highlighting it



6. Click the Import Link in the bottom right corner of the screen

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



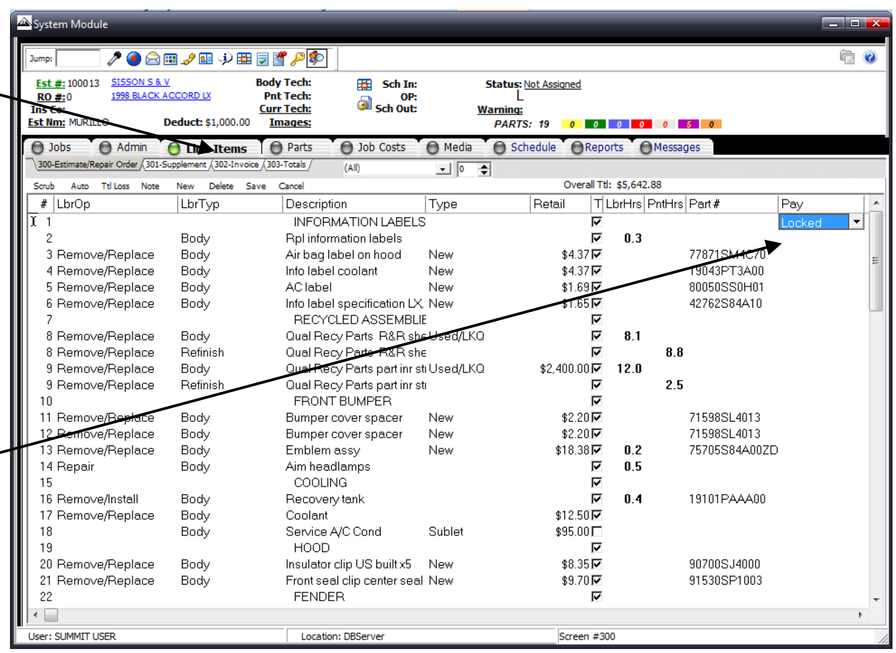


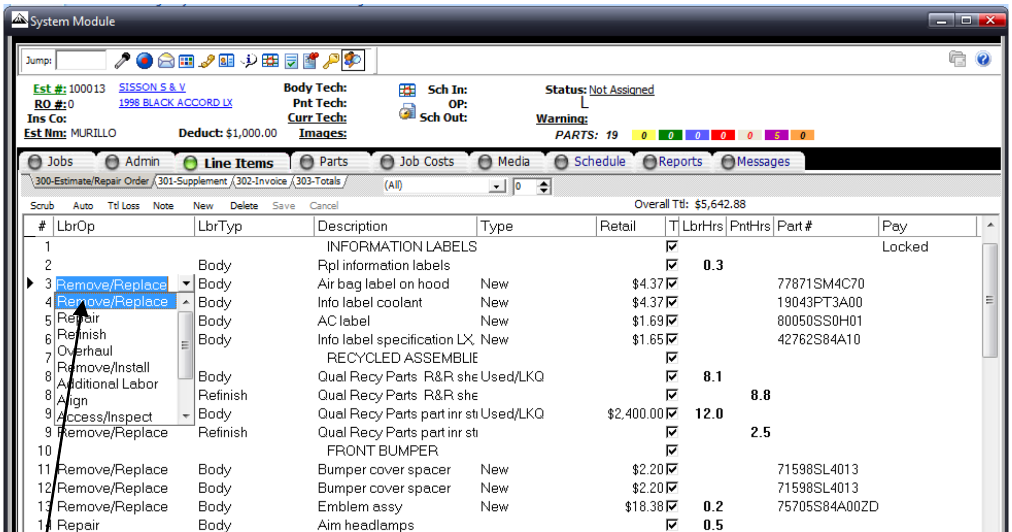
Totaling the Estimate

1. After the estimate has been imported, click the Estimates tab and highlight the estimate. It will be the first estimate in the list. Calculate the estimate by clicking the "Calc" link located in the menu bar above the list of estimates.

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

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



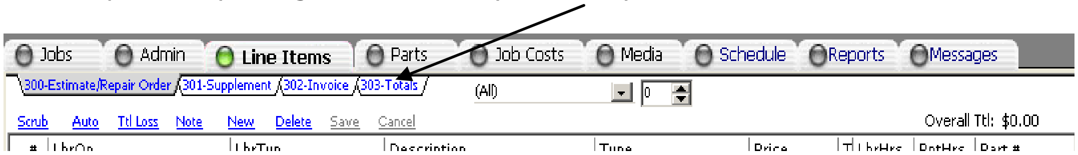


NOTE: Labor Operations, Labor, Pay, and Part Types can be changed within the Summit Line Items screen. Simply "click on" the field and a "drop down" box appears. You can also change descriptions, prices, and labor time within this screen. If you want to retain these changes you must select locked from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

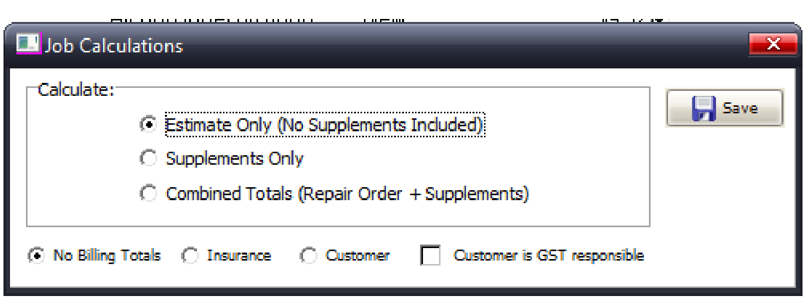
When importing estimate data from ADP or CCC please beware of the following changes that MUST BE made in the Summit RO Line Items, TYPE column:

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

3. When you have completed any changes and are ready to check your totals "click on" the 303-Totals tab.

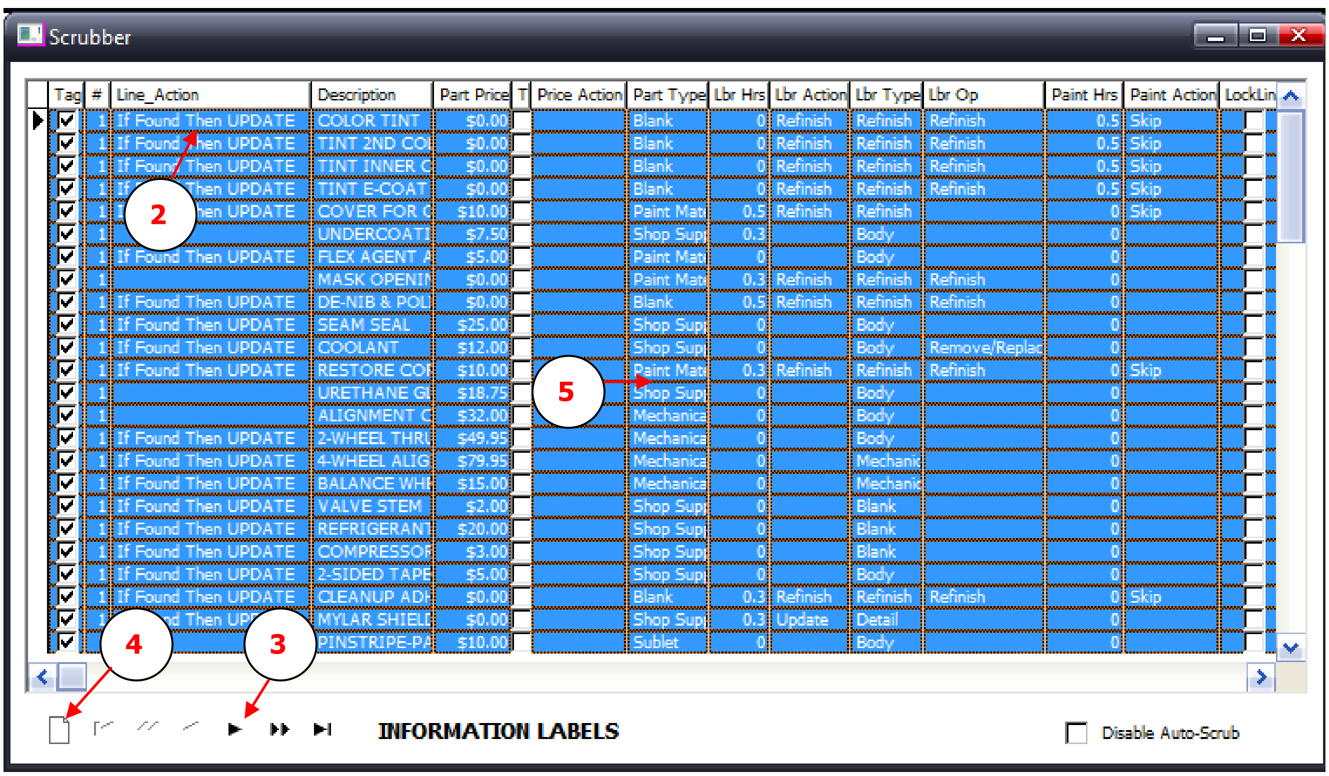


4. Select Estimate Only option from the options that appear, and click Save. Verify the totals.



Scrubbing the Estimate

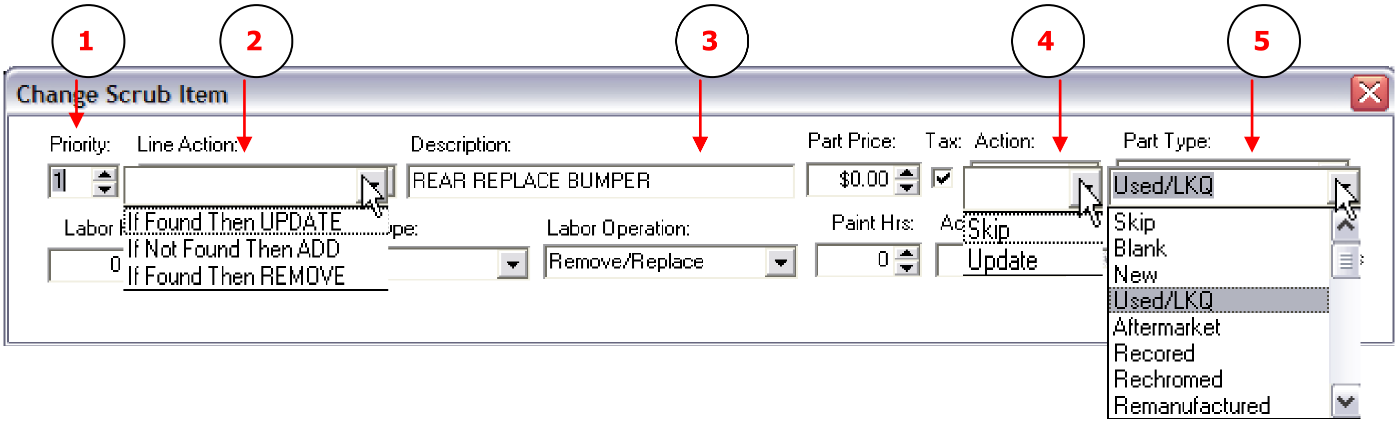
An automated scrubber is now available in the Line Items tab. The scrubber allows you to automatically add or change your RO line items. Left click on the scrub icon (**1**) to open this feature.



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

Use the arrows at the bottom of the screen (**3**) to add a Scrub Item based on an existing line item.
Arrow over to the desired line item and select the new button (**4**) to add the Scrub Item.
You can also Add, Change, Delete, or Execute your Scrub Items by right clicking on your current Scrub Items. (**5**)

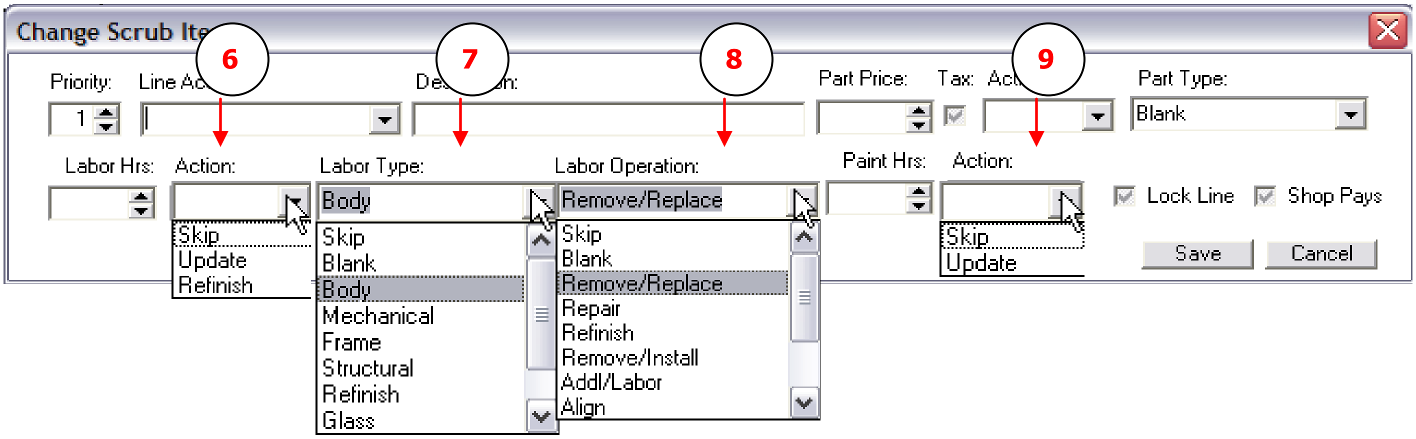
When you select the New Button, Add Scrub Item, or Change Scrub Item, you will be taken to the Change Scrub Item screen:



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

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

The Priority number (**1**) shows the order the Scrub Items are executed in.
The three options available in Line Action (**2**) determine what the Scrub Item will accomplish.
Your Description (**3**) needs to match the way it will be imported from your estimating system.
Each Action (**4**) box applies to the numeric value entered just before it.
You can set the line's Part Type (**5**) to be anything in the drop down list.



The Refinish option under the Labor Hrs Action box (**6**) will transfer any hours you have entered to Refinish Labor.
Labor Type (**7**) and Labor Operation (**8**) can be set to anything in the drop down list.
The Paint Hrs Action (**9**) also applies only to the numbers entered in the Paint Hours box before it.

Creating a Repair Order

With an Estimate

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

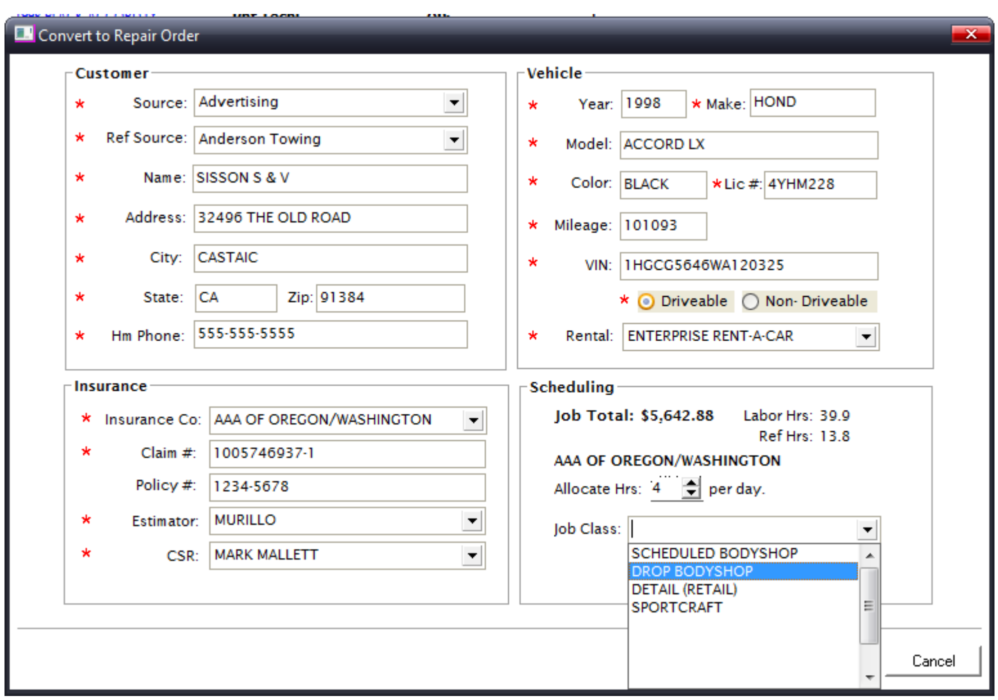
1. "Click on" the *Jobs Tab* and your estimate will be visible in the estimate list.

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

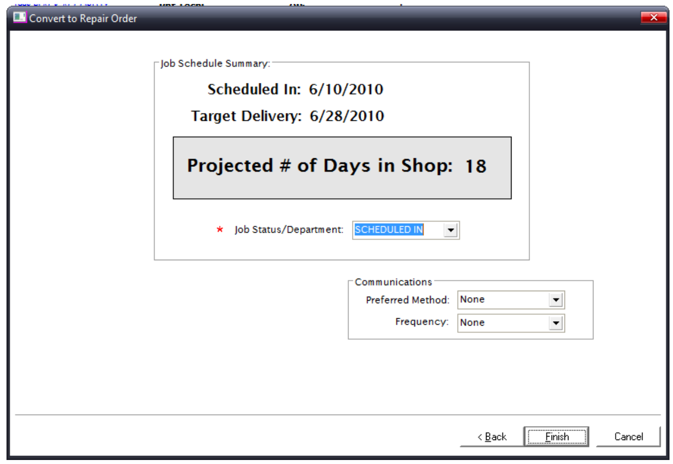
3. Once you "drag" it up, the Summit "RO Wizard" appears. The following screens will appear. Please fill in all fields with a RED * select Next when you have completed the appropriate fields.

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

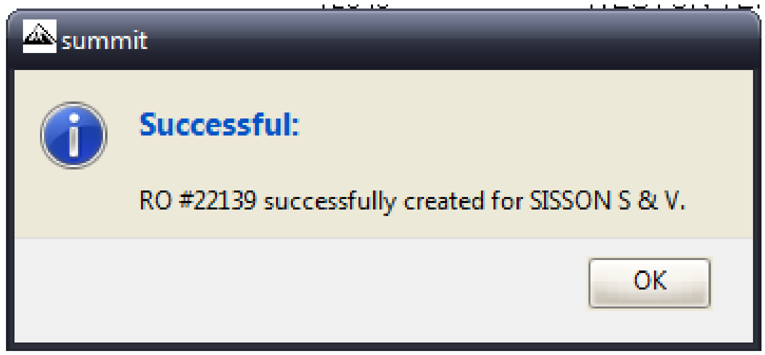
NOTE: Summit can automatically "classify" your repairs if you have set up your Repair Classification profile in the Summit System Administration module.



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



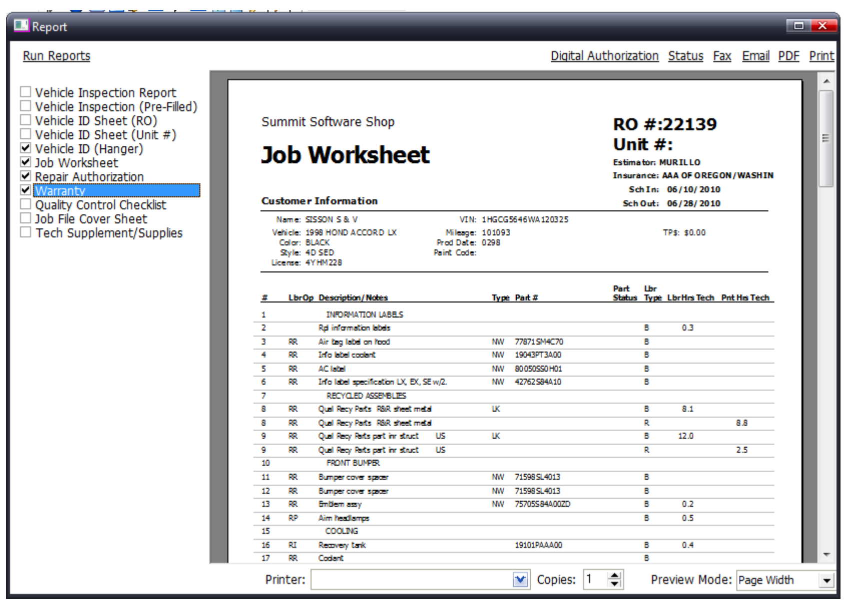
6. Once you have successfully completed the RO Wizard Process Summit will generate your *Repair Order #.*



Print the RO Document Pack

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

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



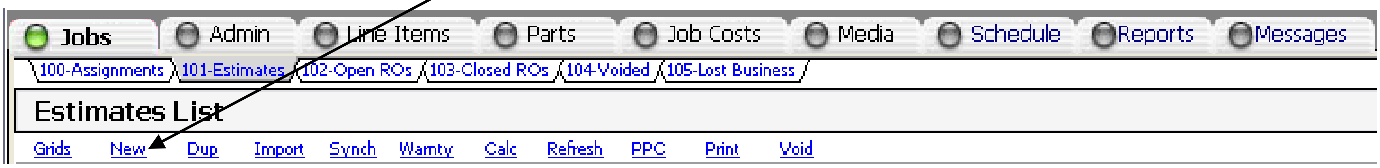
2. Click Run Reports to preview each report, and then print the reports.

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

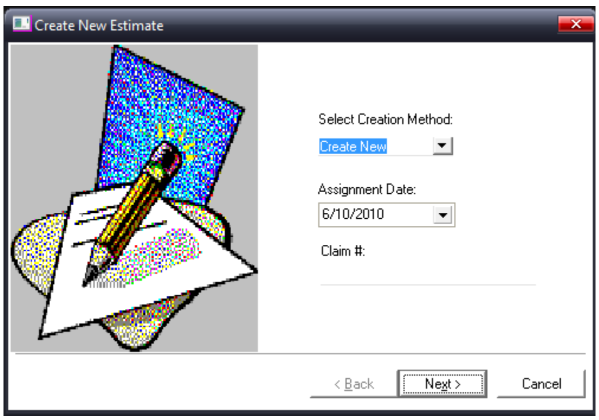
Without an Estimate (Towed Vehicles)

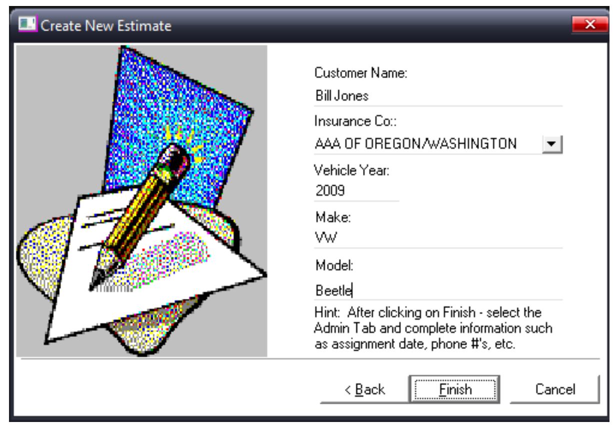
Creating an Estimate in Summit and then Moving the Estimate to the Open RO List

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

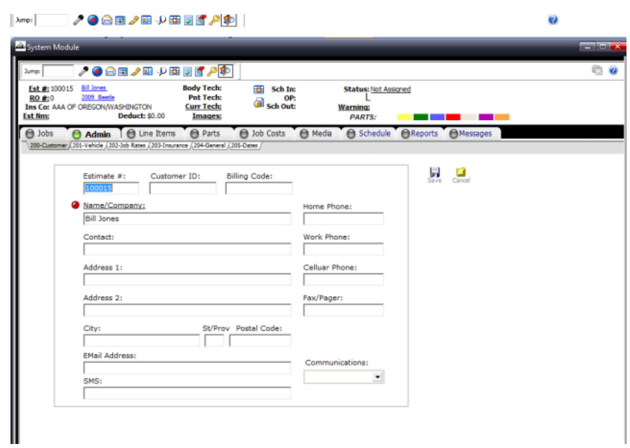


2. Follow the screens below and complete the forms in their entirety.

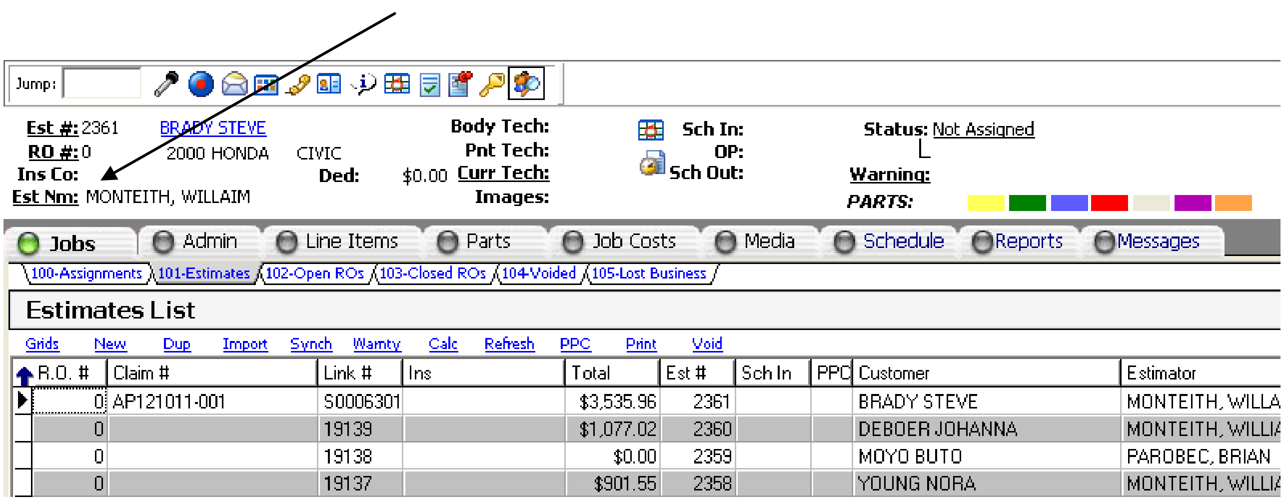




3. After you complete the basic *Customer Information Screen* the system will take you directly to the detailed *ADMIN* section for that Repair Order. Beginning with the *Customer Tab,* and working "left to right", simply fill out all the appropriate information in each tab and "click on" the *SAVE ICON*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

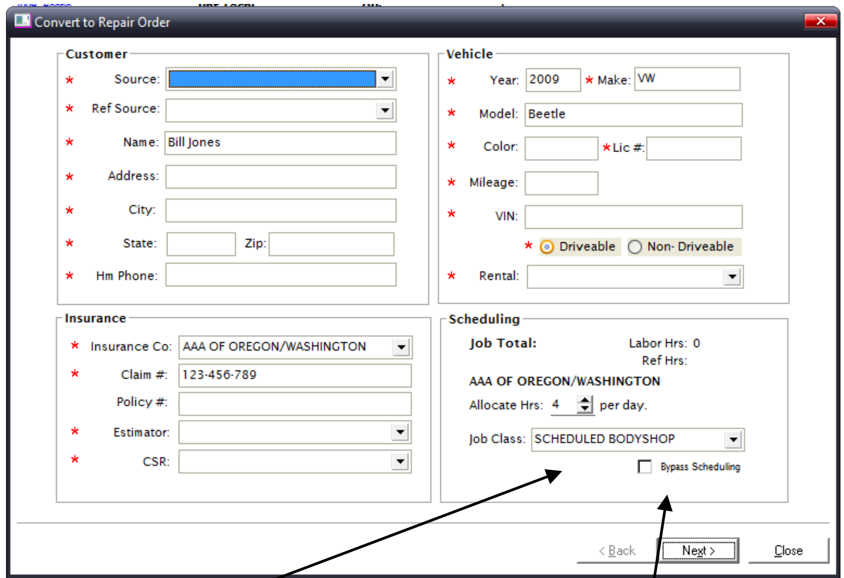


4. After *SAVE*, "click on" the *Jobs Tab* and your estimate will now be visible in the estimate list.



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

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



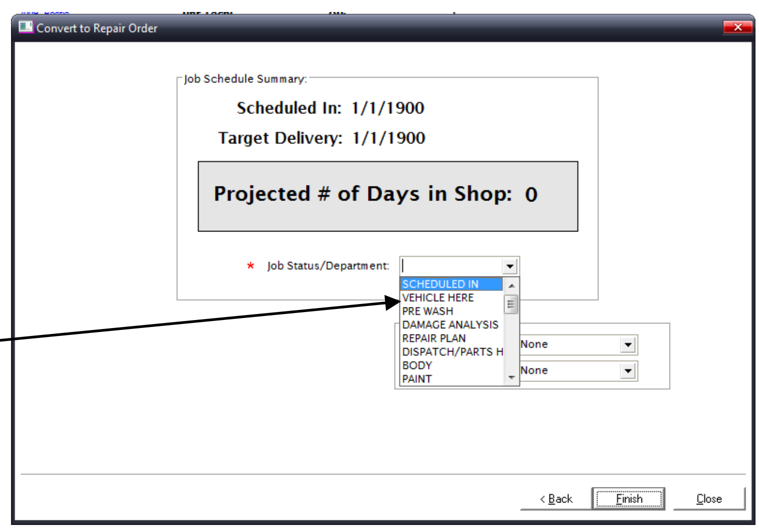
7. The *Job Data* window provides you with information related to the repair dollars and hours, Insurance Company and Claim information, as well as areas to enter in the estimator, actual RO creation data, and how many hours per day you or your insurer would like to spend repairing the vehicle. This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

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

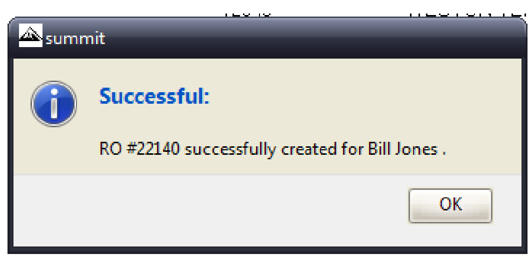
On tow-ins select *Bypass Scheduling.*

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

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

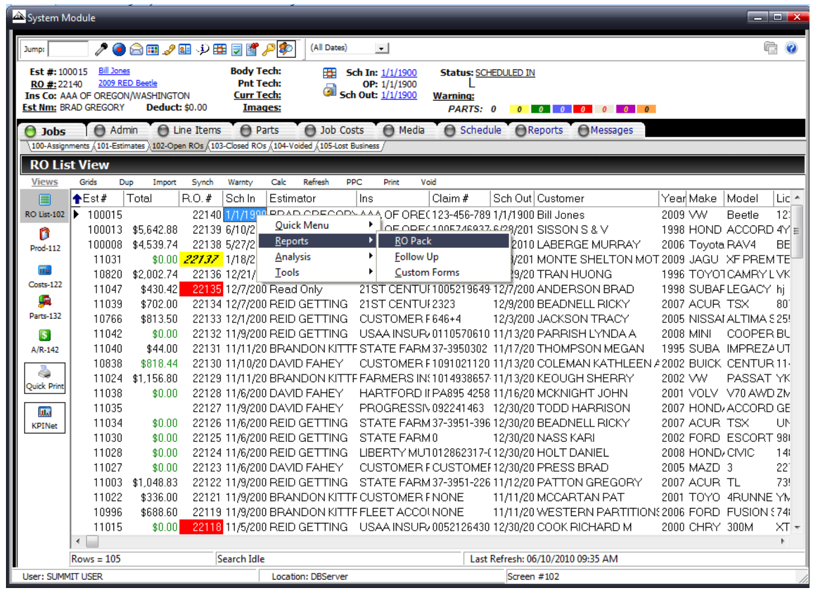


9. Once you have successfully completed the RO Wizard Process Summit will generate your *Repair Order #.*



Printing the RO Document Pack

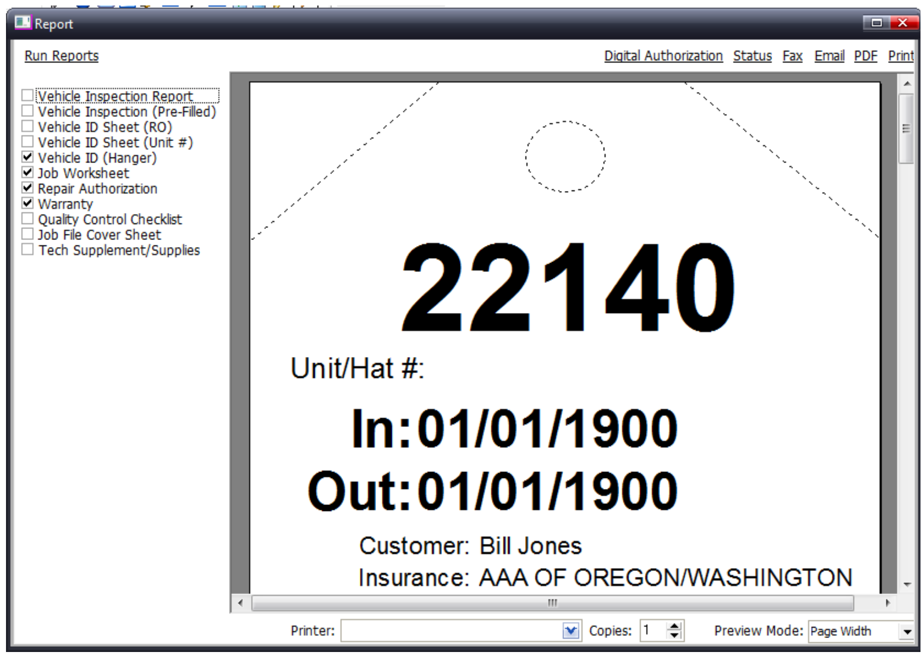
1. Find the RO that was just created in the *Open RO's* tab, highlight it and right click. Choose *Reports*, then click *RO Pack.* This will bring up a menu that will allow you to choose to print any or all of the following reports/forms:



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

2. Click <u>Run Reports</u> to preview each report, and then print the reports.

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



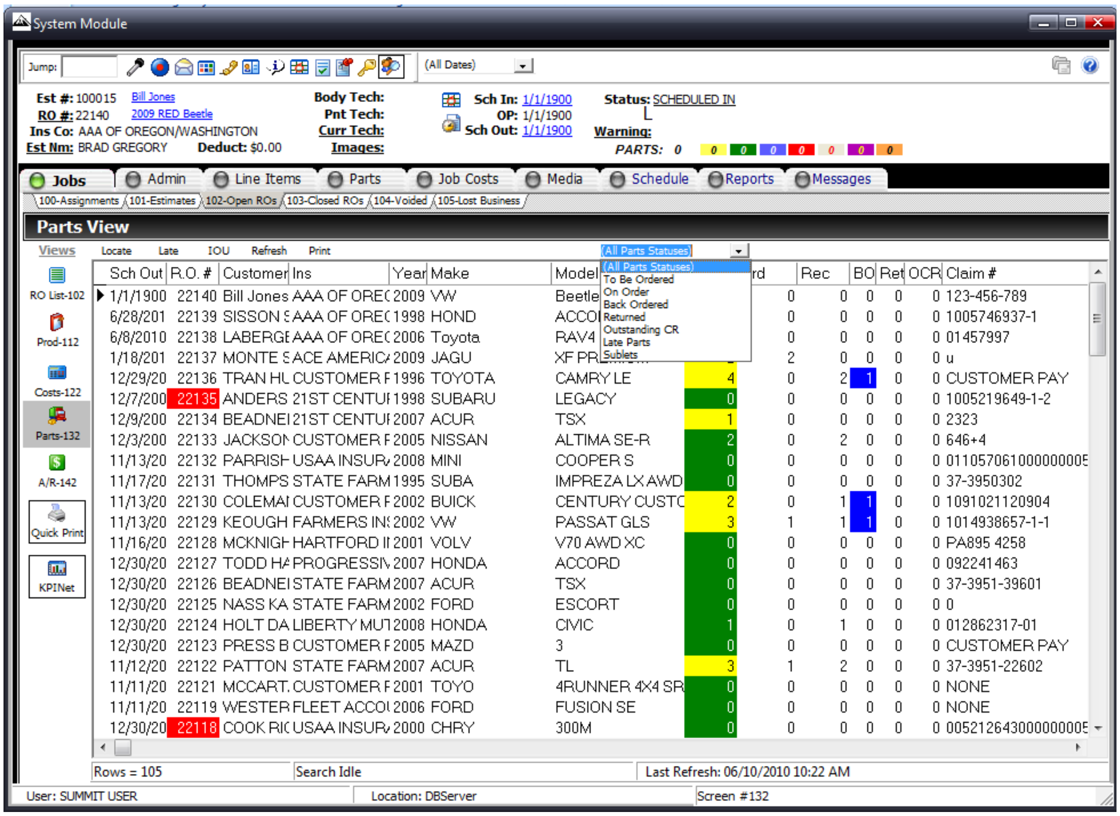
Parts Management

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

The Summit Parts View

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

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



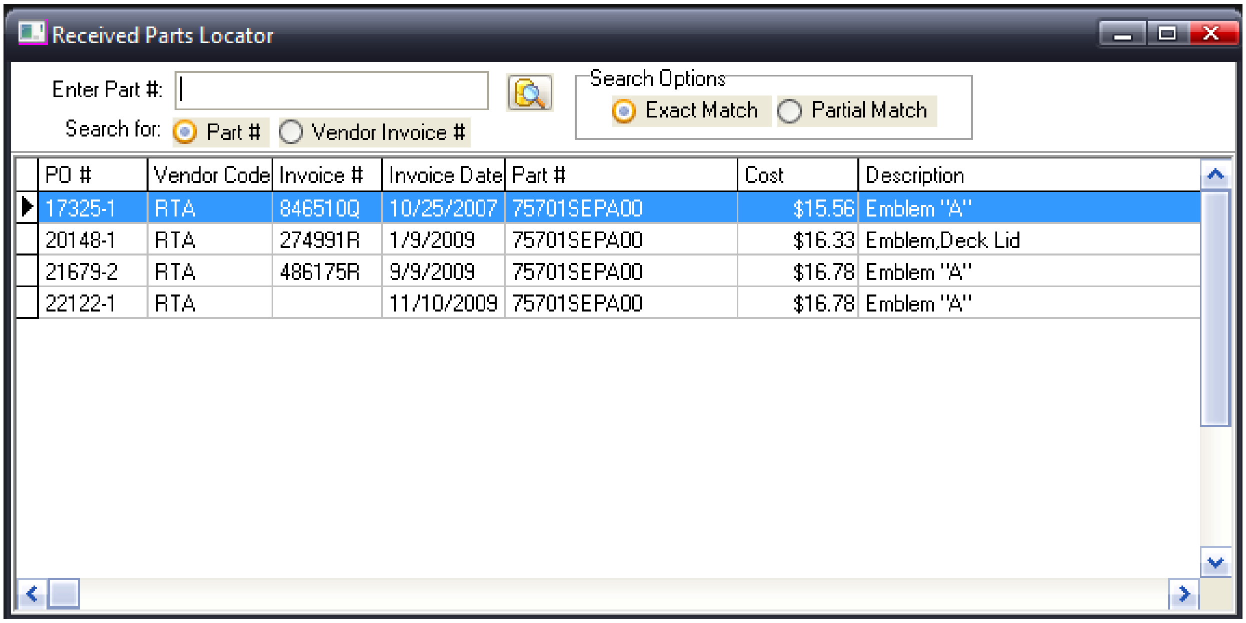
The *Parts View* menu includes the ability *Locate Parts*, view *Late Parts*, *IOU's*, *Refresh* your connection to the Summit Server, and *Print* Parts related reports.

Locating Parts

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

1. “Click on” the Locate link and Summit will launch the search screen below.

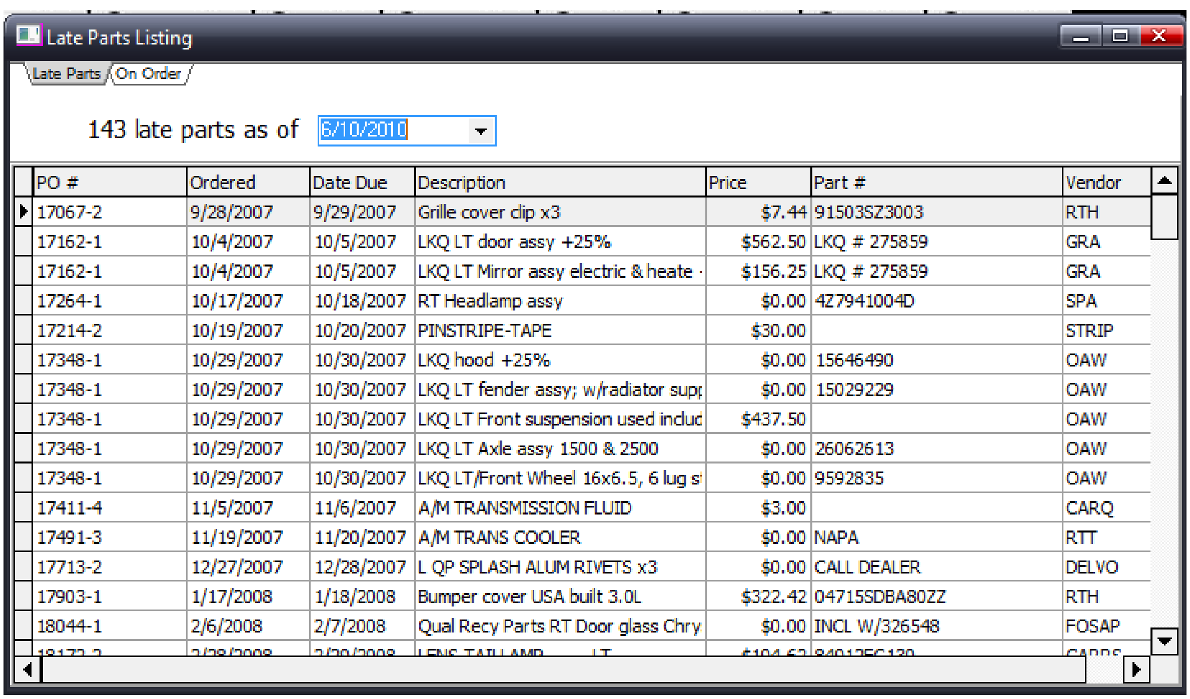
2. Enter in the part # or Vendor Invoice # and Summit will display the RO#, Vendor Code, Vendor Invoice #, Part #, Cost, and Description. Please beware that to locate a part, the part # or invoice number MUST BE an exact match.



PO #	Vendor Code	Invoice #	Invoice Date	Part #	Cost	Description
17325-1	RTA	846510Q	10/25/2007	75701SEPA00	$15.56	Emblem "A"
20148-1	RTA	274991R	1/9/2009	75701SEPA00	$16.33	Emblem,Deck Lid
21679-2	RTA	486175R	9/9/2009	75701SEPA00	$16.78	Emblem "A"
22122-1	RTA		11/10/2009	75701SEPA00	$16.78	Emblem "A"

Late Parts

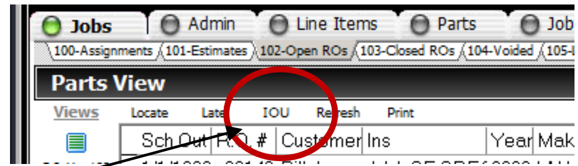
To locate *Late Parts,* “click on” the *Late Parts ICON.* Summit will display a list of late parts and parts on order based on an “as of date”. This feature will help you identify parts that are late or have been ordered.

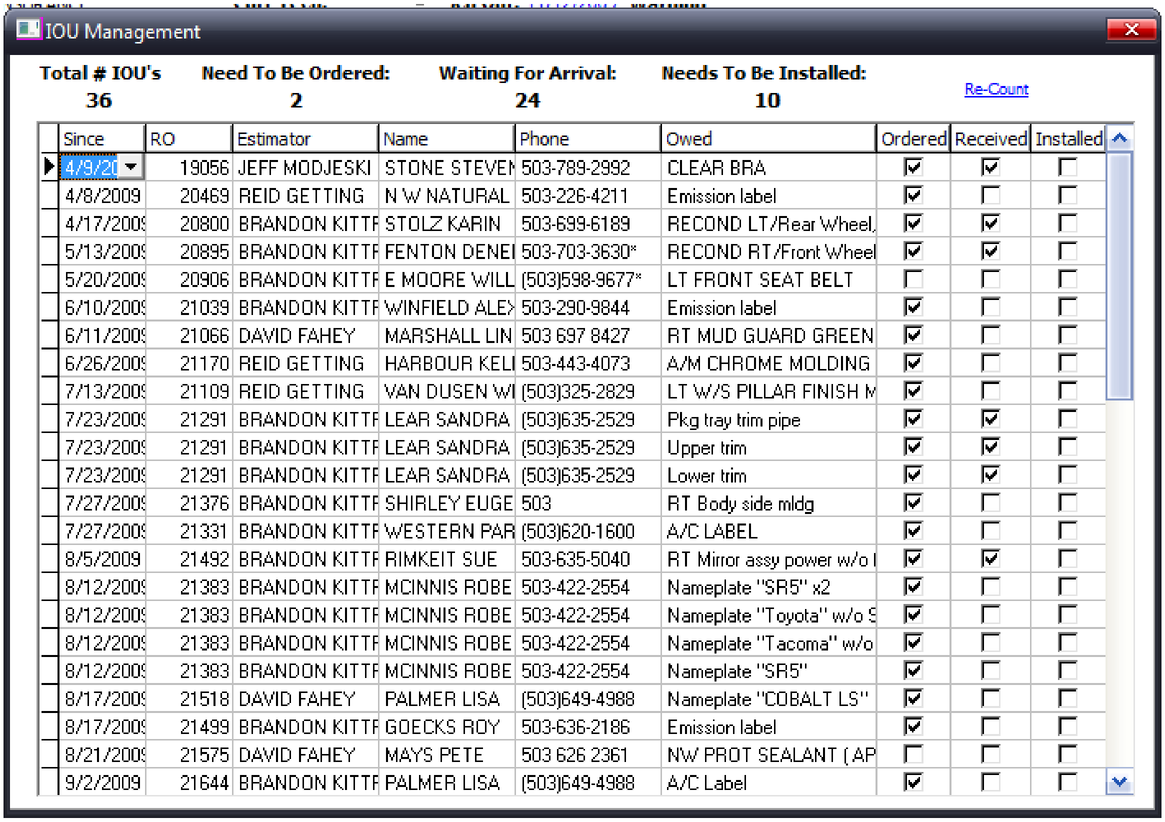


PO #	Ordered	Date Due	Description	Price	Part #	Vendor
17067-2	9/28/2007	9/29/2007	Grille cover clip x3	$7.44	91503SZ3003	RTH
17162-1	10/4/2007	10/5/2007	LKQ LT door assy +25%	$562.50	LKQ # 275859	GRA
17162-1	10/4/2007	10/5/2007	LKQ LT Mirror assy electric & heate	$156.25	LKQ # 275859	GRA
17264-1	10/17/2007	10/18/2007	RT Headlamp assy	$0.00	4Z7941004D	SPA
17214-2	10/19/2007	10/20/2007	PINSTRIPE-TAPE	$30.00		STRIP
17348-1	10/29/2007	10/30/2007	LKQ hood +25%	$0.00	15646490	OAW
17348-1	10/29/2007	10/30/2007	LKQ LT fender assy; w/radiator sup	$0.00	15029229	OAW
17348-1	10/29/2007	10/30/2007	LKQ LT Front suspension used incluc	$437.50		OAW
17348-1	10/29/2007	10/30/2007	LKQ LT Axle assy 1500 & 2500	$0.00	26062613	OAW
17348-1	10/29/2007	10/30/2007	LKQ LT/Front Wheel 16x6.5, 6 lug s	$0.00	9592835	OAW
17411-4	11/5/2007	11/6/2007	A/M TRANSMISSION FLUID	$3.00		CARQ
17491-3	11/19/2007	11/20/2007	A/M TRANS COOLER	$0.00	NAPA	RTT
17713-2	12/27/2007	12/28/2007	L QP SPLASH ALUM RIVETS x3	$0.00	CALL DEALER	DELVO
17903-1	1/17/2008	1/18/2008	Bumper cover USA built 3.0L	$322.42	04715SDBA80ZZ	RTH
18044-1	2/6/2008	2/7/2008	Qual Recy Parts RT Door glass Chry	$0.00	INCL W/326548	FOSAP

IOU’s

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



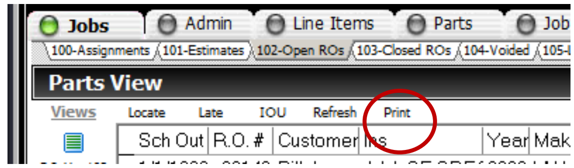


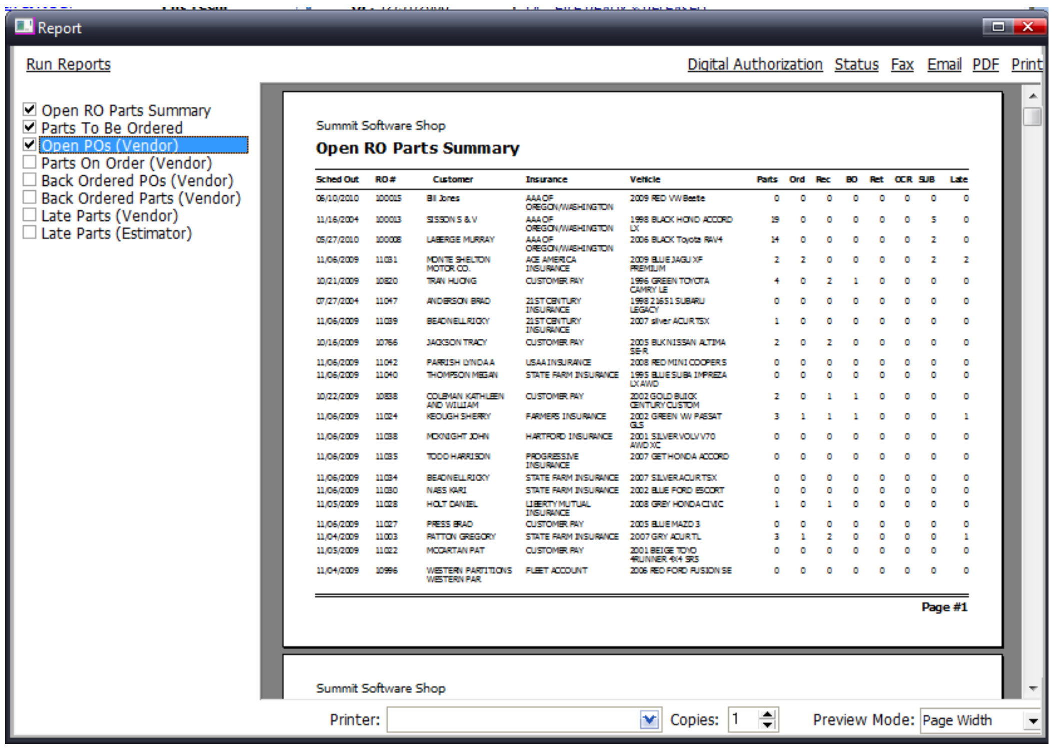
Since	RO	Estimator	Name	Phone	Owed	Ordered	Received	Installed
4/9/20	19056	JEFF MODJESKI	STONE STEVEI	503-789-2992	CLEAR BRA	☑	☑	☐
4/8/2009	20469	REID GETTING	N W NATURAL	503-226-4211	Emission label	☑	☐	☐
4/17/2009	20800	BRANDON KITTF	STOLZ KARIN	503-699-6189	RECOND LT/Rear Wheel,	☑	☑	☐
5/13/2009	20895	BRANDON KITTF	FENTON DENEI	503-703-3630*	RECOND RT/Front Wheel	☑	☑	☐
5/20/2009	20906	BRANDON KITTF	E MOORE WILL	(503)598-9677*	LT FRONT SEAT BELT	☐	☐	☐
6/10/2009	21039	BRANDON KITTF	WINFIELD ALEX	503-290-9844	Emission label	☑	☐	☐
6/11/2009	21066	DAVID FAHEY	MARSHALL LIN	503 697 8427	RT MUD GUARD GREEN	☑	☐	☐
6/26/2009	21170	REID GETTING	HARBOUR KELI	503-443-4073	A/M CHROME MOLDING	☑	☐	☐
7/13/2009	21109	REID GETTING	VAN DUSEN WI	(503)325-2829	LT W/S PILLAR FINISH M	☑	☐	☐
7/23/2009	21291	BRANDON KITTF	LEAR SANDRA	(503)635-2529	Pkg tray trim pipe	☑	☑	☐
7/23/2009	21291	BRANDON KITTF	LEAR SANDRA	(503)635-2529	Upper trim	☑	☑	☐
7/23/2009	21291	BRANDON KITTF	LEAR SANDRA	(503)635-2529	Lower trim	☑	☑	☐
7/27/2009	21376	BRANDON KITTF	SHIRLEY EUGE	503	RT Body side mldg	☑	☐	☐
7/27/2009	21331	BRANDON KITTF	WESTERN PAR	(503)620-1600	A/C LABEL	☑	☐	☐
8/5/2009	21492	BRANDON KITTF	RIMKEIT SUE	503-635-5040	RT Mirror assy power w/o I	☑	☑	☐
8/12/2009	21383	BRANDON KITTF	MCINNIS ROBE	503-422-2554	Nameplate "SR5" x2	☑	☐	☐
8/12/2009	21383	BRANDON KITTF	MCINNIS ROBE	503-422-2554	Nameplate "Toyota" w/o S	☑	☐	☐
8/12/2009	21383	BRANDON KITTF	MCINNIS ROBE	503-422-2554	Nameplate "Tacoma" w/o	☑	☐	☐
8/12/2009	21383	BRANDON KITTF	MCINNIS ROBE	503-422-2554	Nameplate "SR5"	☑	☐	☐
8/17/2009	21518	DAVID FAHEY	PALMER LISA	(503)649-4988	Nameplate "COBALT LS"	☑	☐	☐
8/17/2009	21499	BRANDON KITTF	GOECKS ROY	503-636-2186	Emission label	☑	☐	☐
8/21/2009	21575	DAVID FAHEY	MAYS PETE	503 626 2361	NW PROT SEALANT (AP	☐	☐	☐
9/2/2009	21644	BRANDON KITTF	PALMER LISA	(503)649-4988	A/C Label	☑	☐	☐

Parts View Printing

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

- Open RO's Parts Summary
- Parts To Be Ordered
- Open Pos (Vendor)
- Parts on Order (Vendor)
- Back Ordered POs (Vendor)
- Back Ordered Parts (Vendor)
- Late Parts (Vendor)
- Late Parts (Estimator)



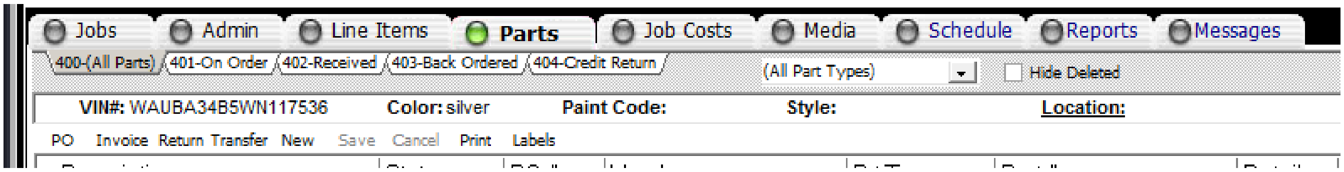


Ordering Parts

1. Click on the *Open RO's* button and choose the *RO List* view

2. Highlight the RO that parts will be ordered for.

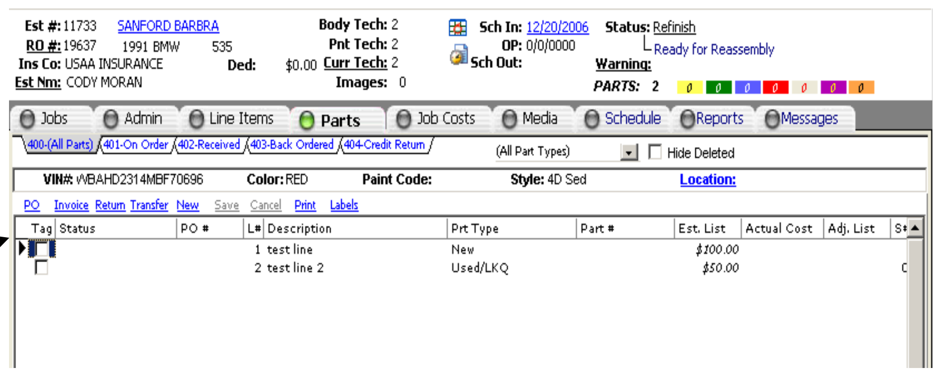
3. Click the Parts tab.



The RO Parts Menu provides the user with the following options: 400-(All Parts), 401-On Order, 402-Received. 403-Back Ordered, 404-Credit Return, *Select and Print Purchase Orders, Enter Invoices, Return Parts, Transfer Parts Costs, Enter New Parts on RO's, Print Parts Reports* and *Labels.*

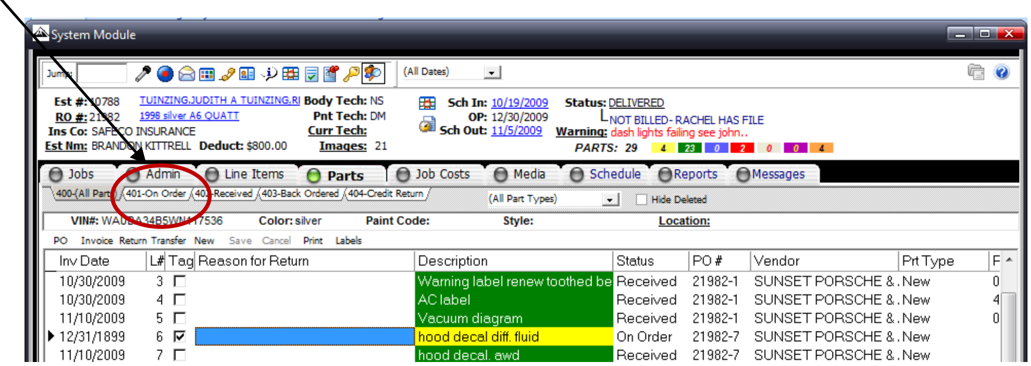
4. Verify that all parts are under the All Parts tab

5. Select the "Part Type" that you need. This filters out all other "Part Types".



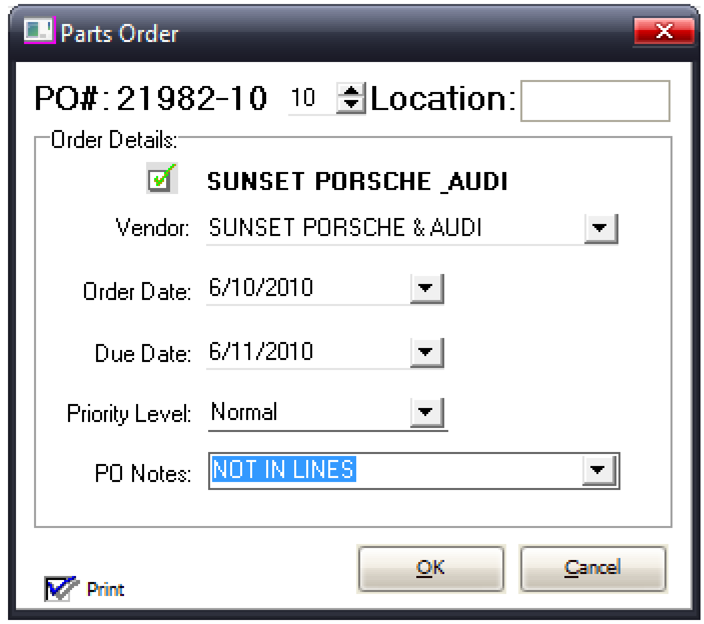
6. "Tag" the parts to be ordered by putting a check mark in the box located to the left of the part name (it is in the *Tag* column)

7. Click-and-drag ONE of the parts that were tagged up to the 401-On Order tab.



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

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



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

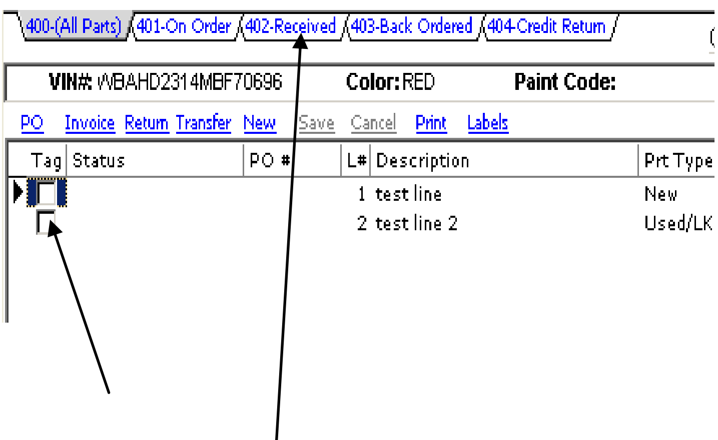
9. After you click OK, Report and Send options will pop up on a new screen.

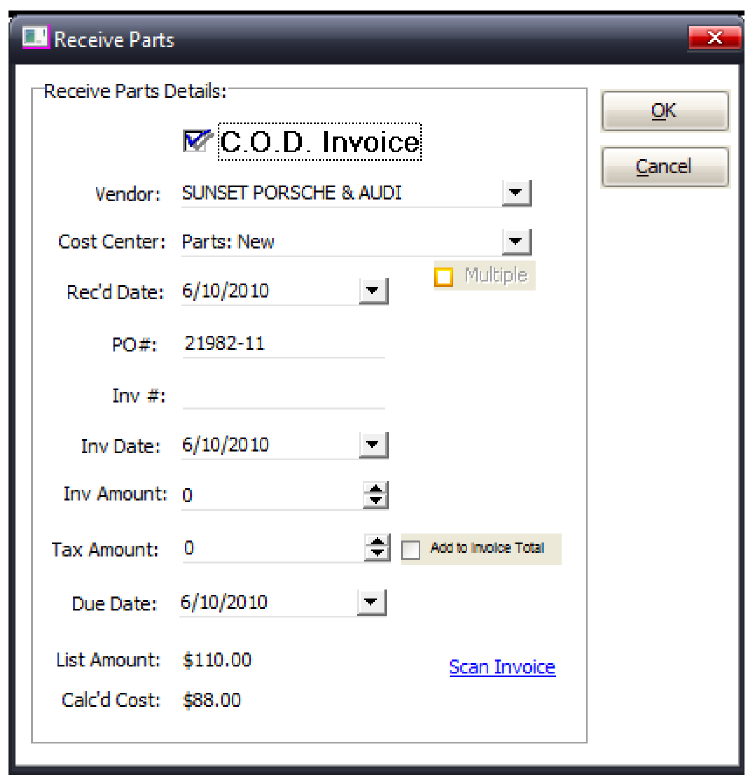
You can Print/Send any of the following:
Parts Order, Purchase Order, Parts List, Photo Report and Image Thumbnail.

Receiving Parts

1. Click on the 401-On Order tab

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





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

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

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

Back Ordered and Credit Returned Parts

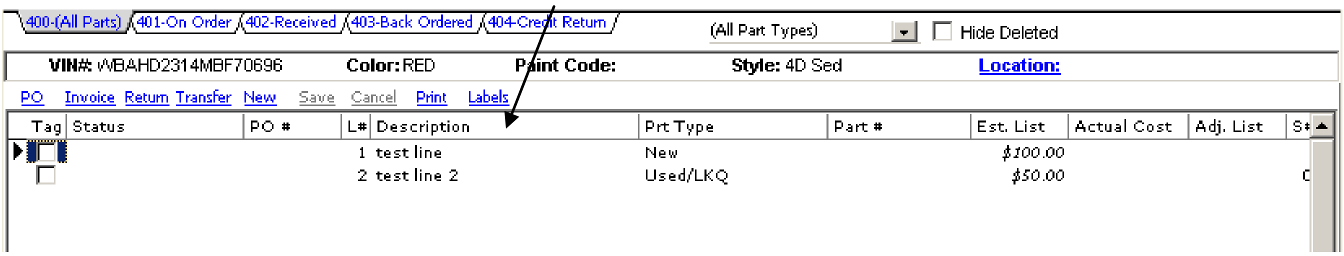
Follow the same procedure to place parts on *Back Ordered* and *Credit Return*.

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

Print the Parts Labels

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

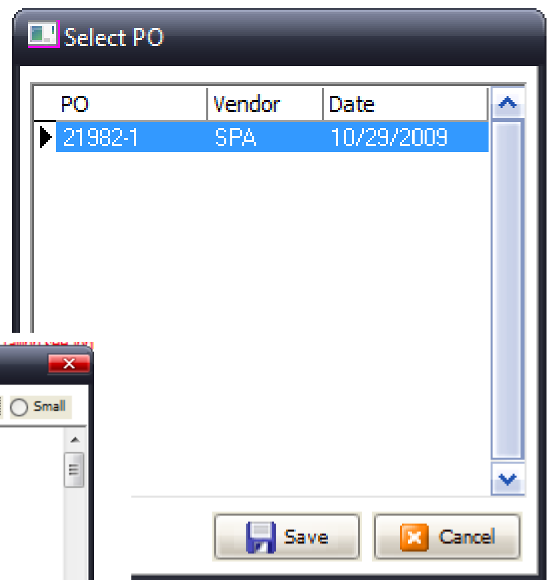
1. Click the *Parts* tab. Then click the *Labels* icon located in the menu bar on the top-middle of the screen

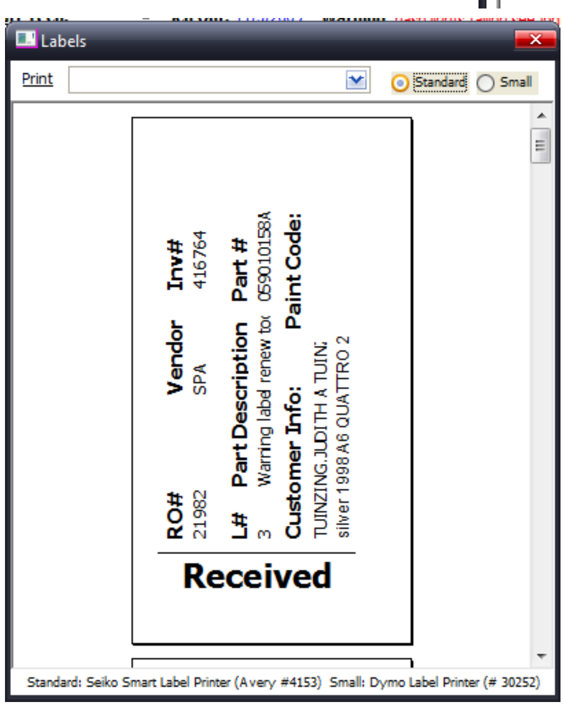


2. Once you have selected the Label link the following print box appears.

Click Save and Summit will print the same # of labels as you have on the order.

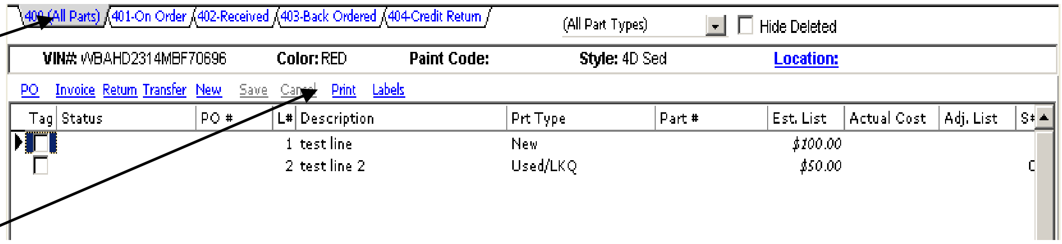
NOTE: Summit recommends SEIKO printers for parts labels





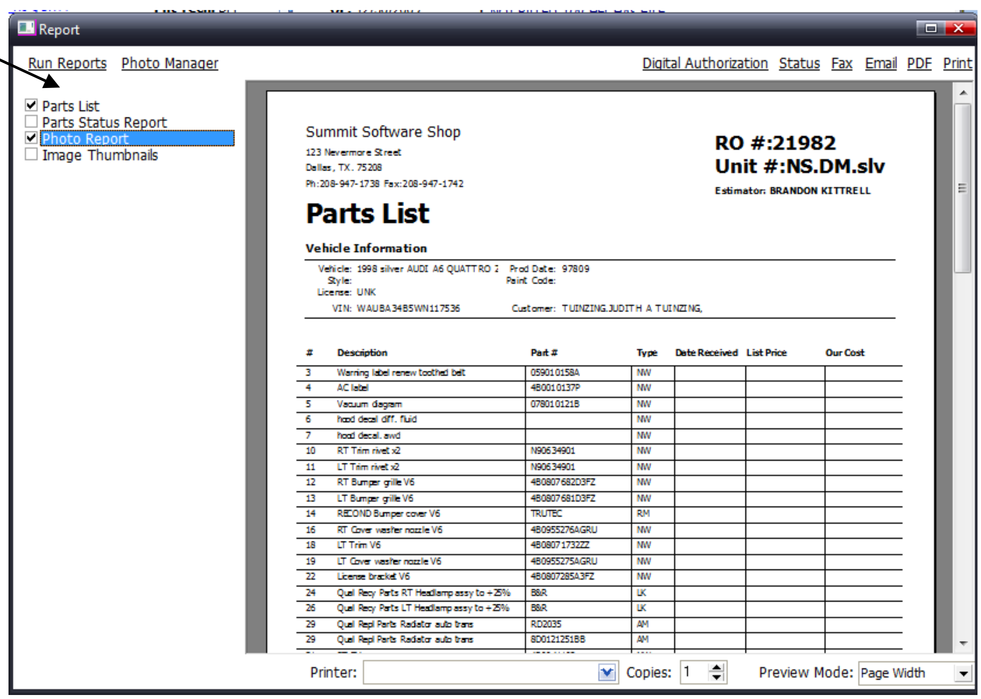
Print the Parts Status and Parts List Reports

1. Click the *All Parts* tab.



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

3. In the menu that appears, place a check mark in the box next to Reports desired and click the Run Reports link.



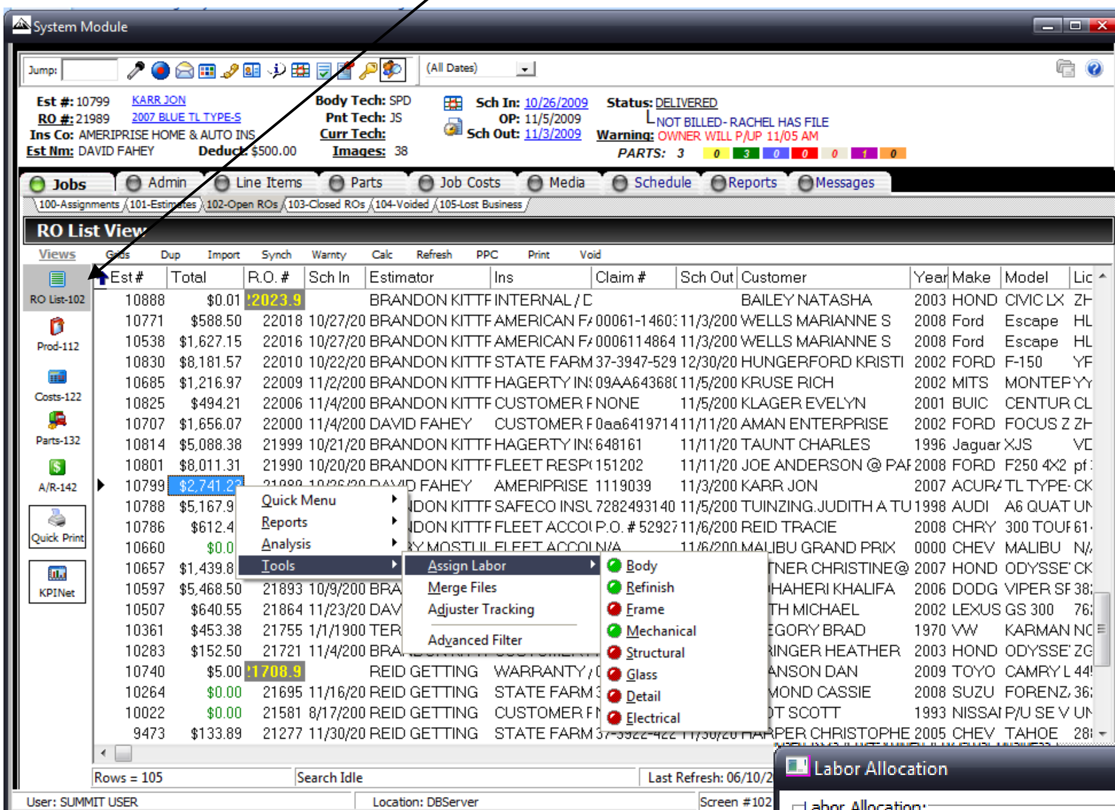
You can print the following reports:

- Parts List
- Parts Status Report
- Photo Report
- Image Thumbnails

Assign Technicians to Jobs

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

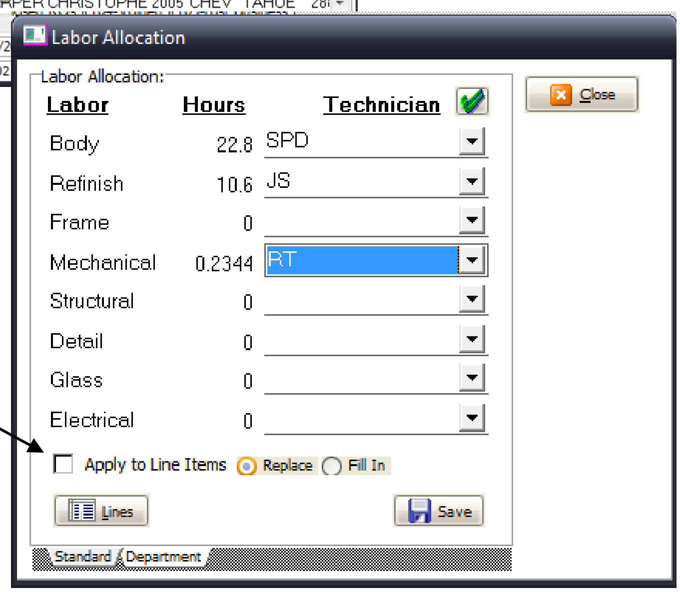
2. "Right Click" on the specific RO you want to allocate, Select *Assign Labor* and the "Assign *Labor Box* appears. (You will notice there are different colors. GREEN = Already assigned, BLUE = Needs to be assigned, RED = No hours available to be assigned)



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

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

5. Follow the same procedure for the other labor types.

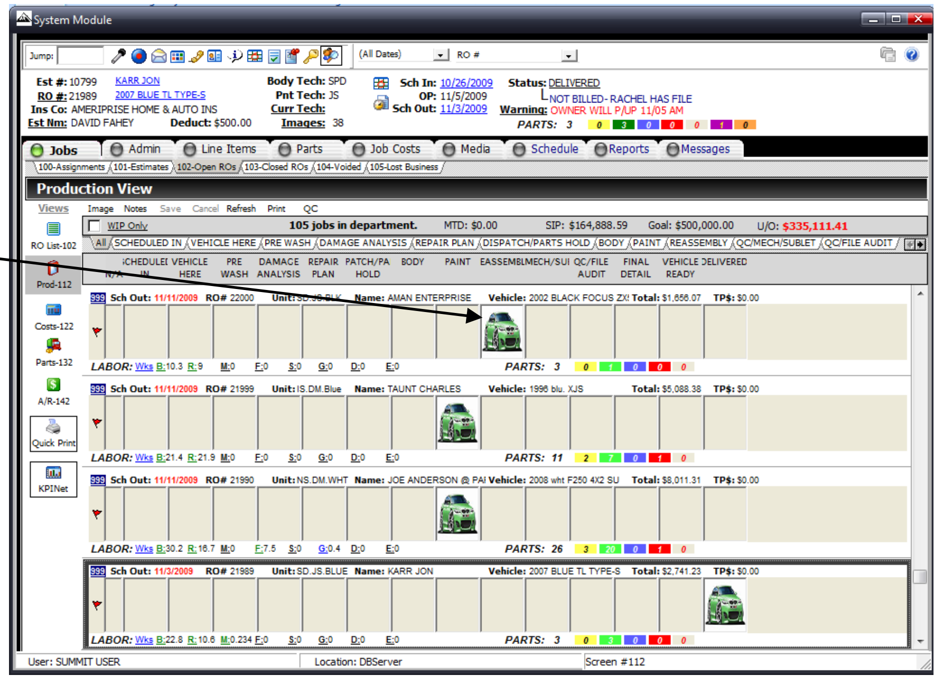


Move the Vehicle through Production Stages

1. Click the *Open RO's* tab and go to the Production-112 View.

2. Select an RO.

3. Left click on the "car image" and drag it to the next department.



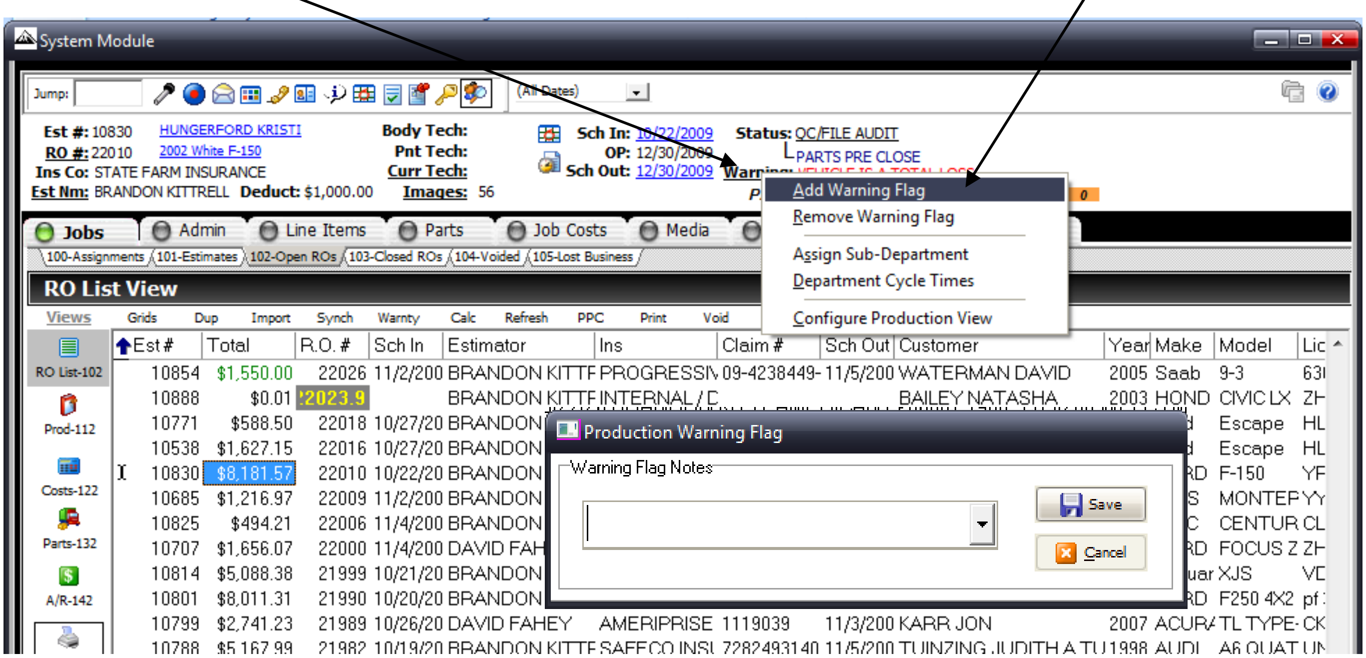
Warning Flags

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

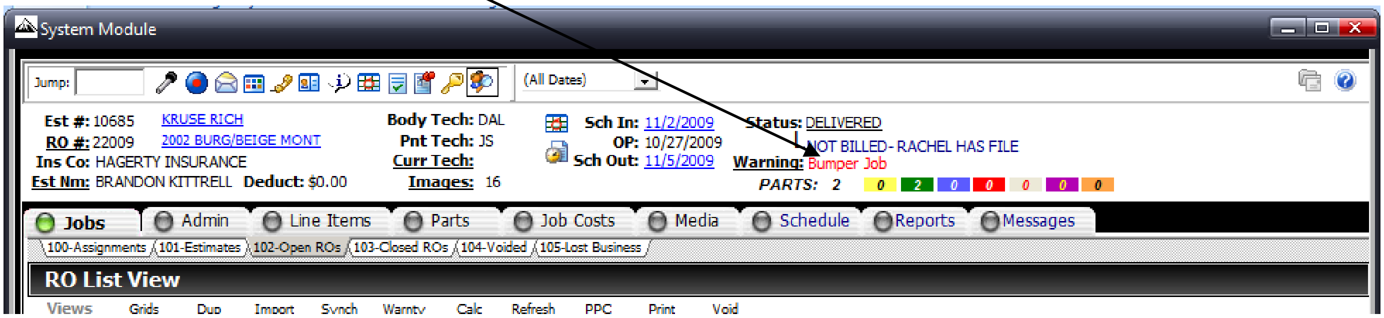
1. Click the *Open RO's* tab and go to the *RO List* view.

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

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



4. The *warning flag* will appear in Red Letters in the customer information at the top of the screen



5. To remove a warning flag, right click on the vehicle icon and choose *Remove Warning Flag.* The warning flag will be removed.

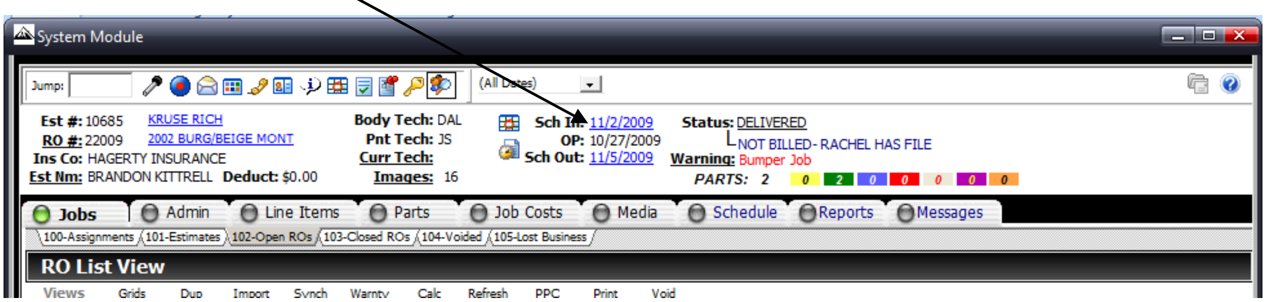
Scheduled In/Out Date Changes

Change Scheduled In Date

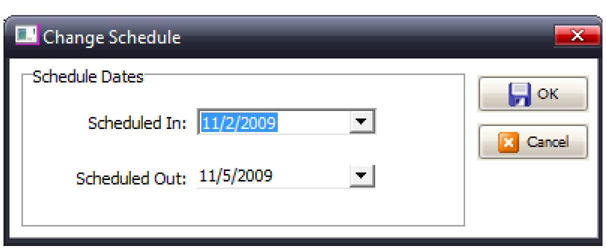
1. Click the *Open RO's* tab and go to the *RO List* view.

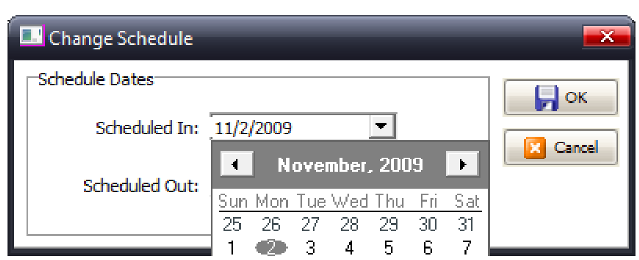
2. Choose the RO you want to change the *Scheduled In Date* for.

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

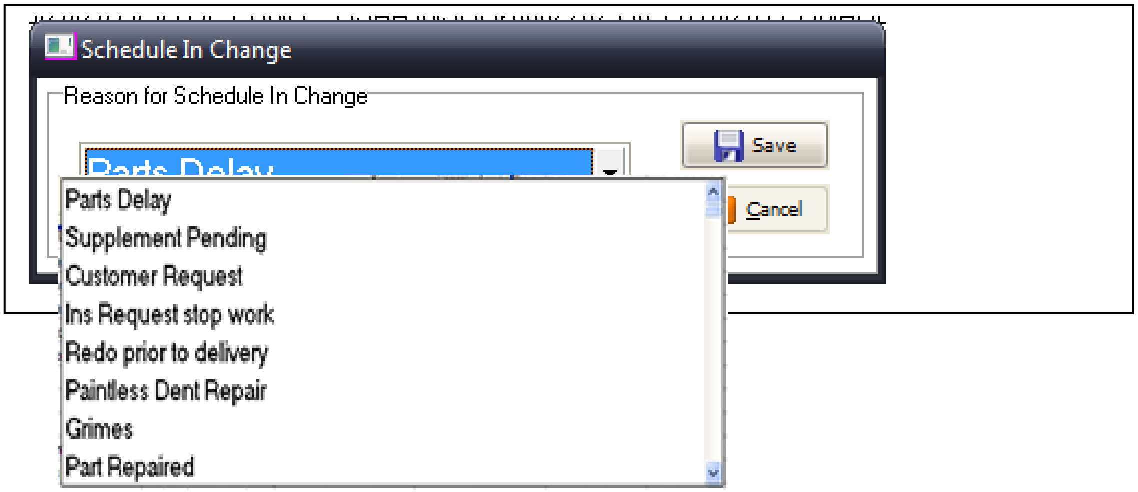


4. Click on the *Scheduled In* date. Select the new Scheduled In date by clicking on the day in the drop down calendar that appears. Verify the hours of work per day for the RO and the new *Scheduled Out* date, and click *OK*.





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



Change Scheduled Out Date

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

Job Costing

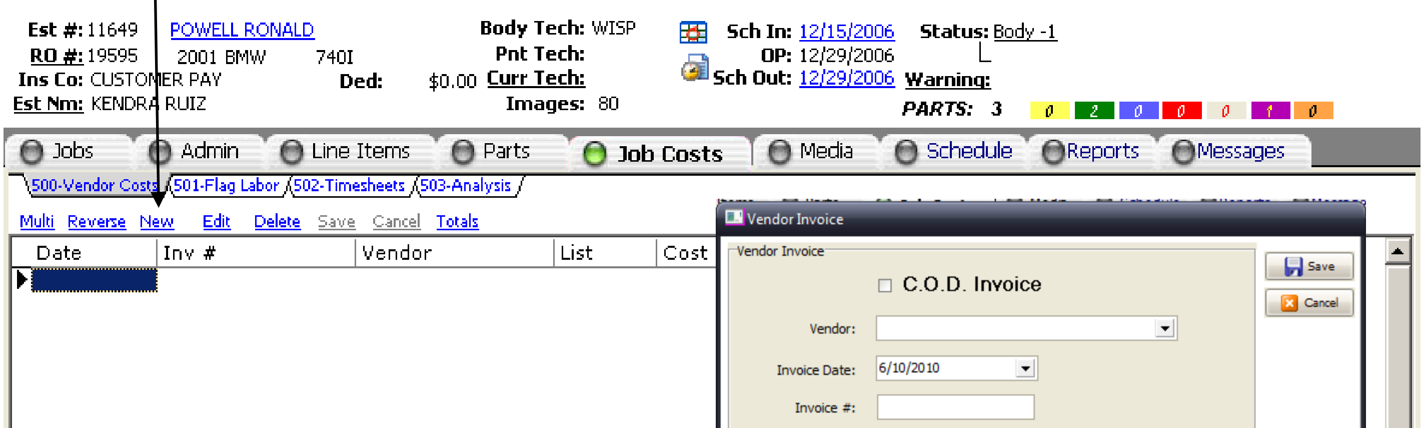
Entering a Manual Vendor Cost

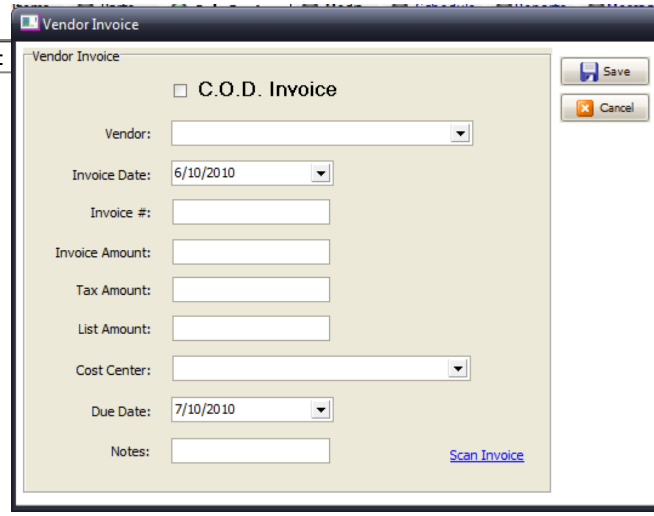
Summit automatically posts vendor costs as parts are received.

1. Vendor Costs can also be entered manually. Choose the RO you would like to add a vendor cost to (in the *RO* List).

2. Click the Job Costs tab and then click the 500-Vendor Costs tab.

3. Click the New link in the menu bar on the left side of the screen.





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

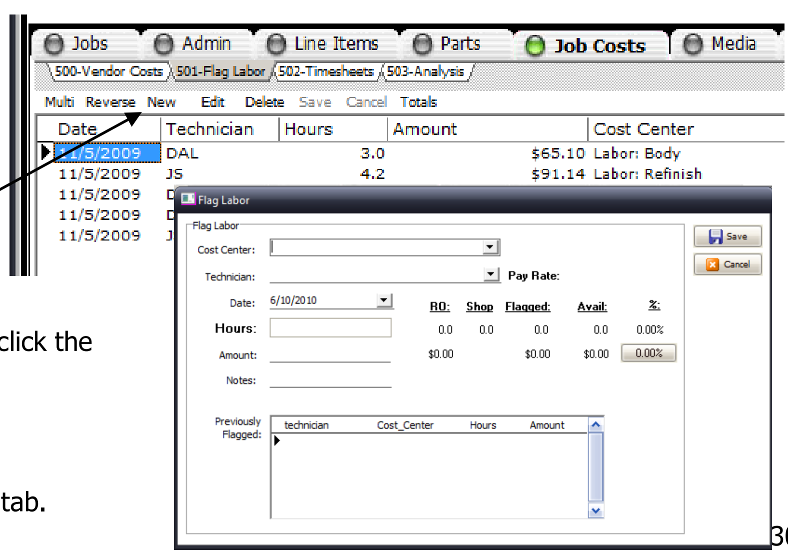
Entering Manual Costing

Manually Flagging Flat Rate or Commission Labor Costs

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

2. Click the 501-Flag Labor tab.

3. Click the New link in the menu bar on the top of the screen



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

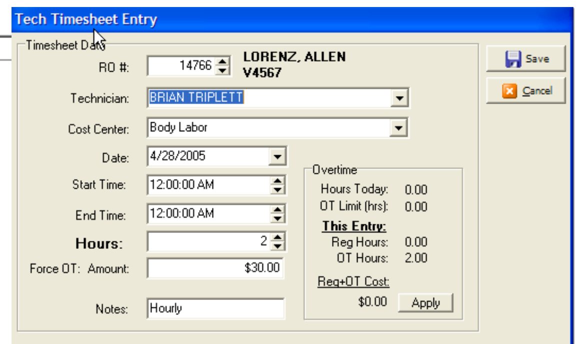
5. The new labor cost will be posted in the *Flag Labor* tab.

Manually Entering Hourly Labor Costs

Hourly Job Costing and Technician Efficiency Measurement

1. Click the Job Costs button and the 502-Timesheets tab and then select the New link.

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

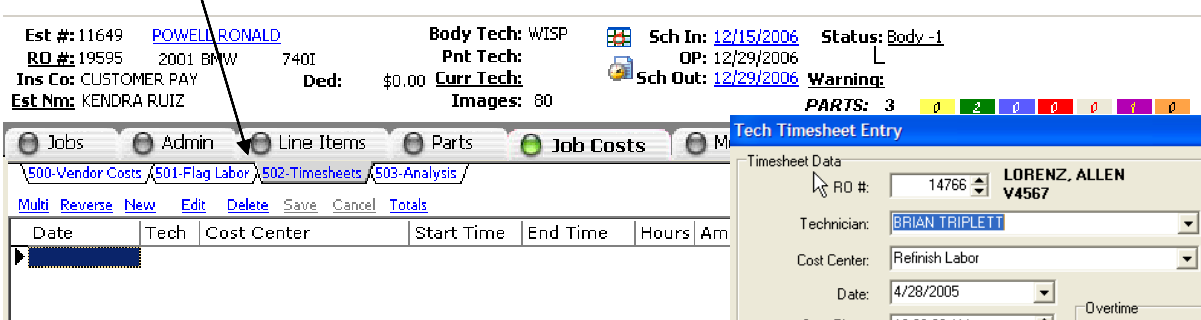


then

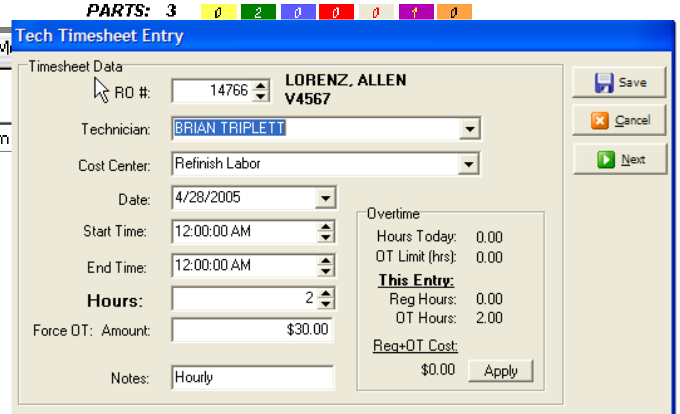
Manually Entering Hourly Labor Costs for Multiple Repair Orders

Hourly Job Costing and Technician Efficiency Measurement

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



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



Costing Paint Materials, Hazardous Waste, and Shop Supplies

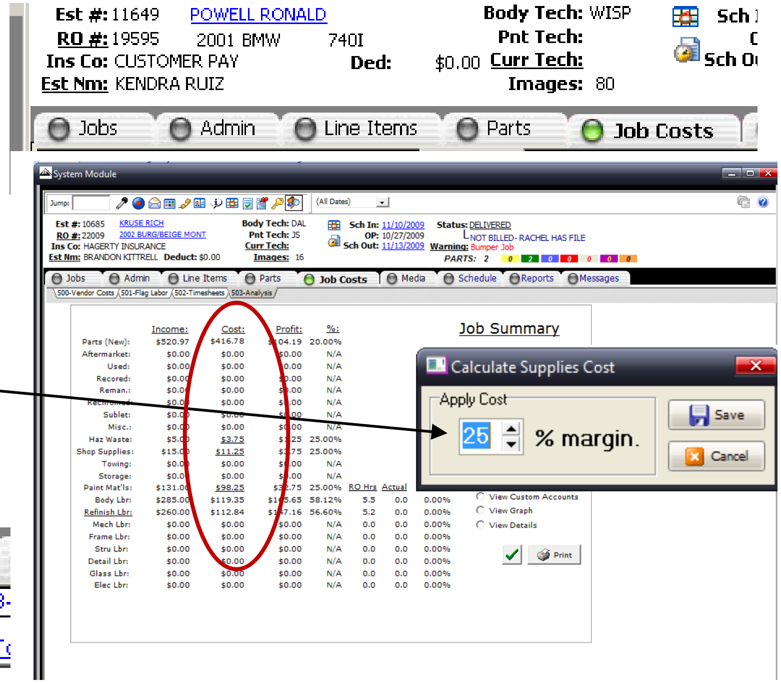
1. Choose the RO you would like to add the costs to. (in the *RO List* view)

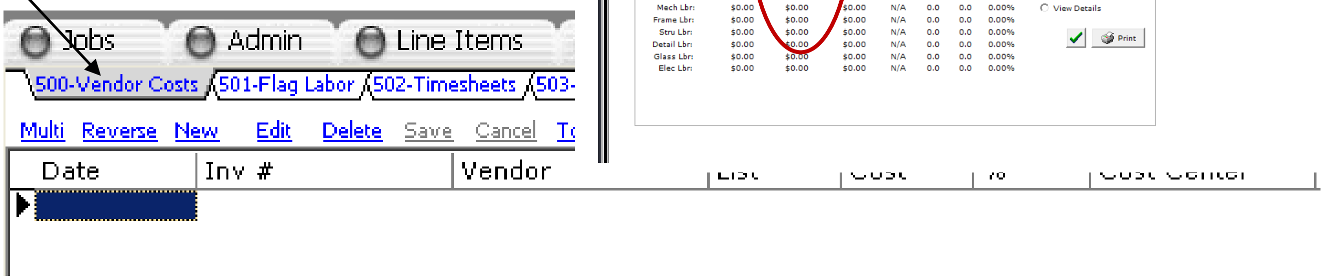
2. Click on the Job Costs button and choose the 503-Analysis tab.

3. To post a cost for any of these categories, click the linked (anything with a line underneath) in the *Cost* column.

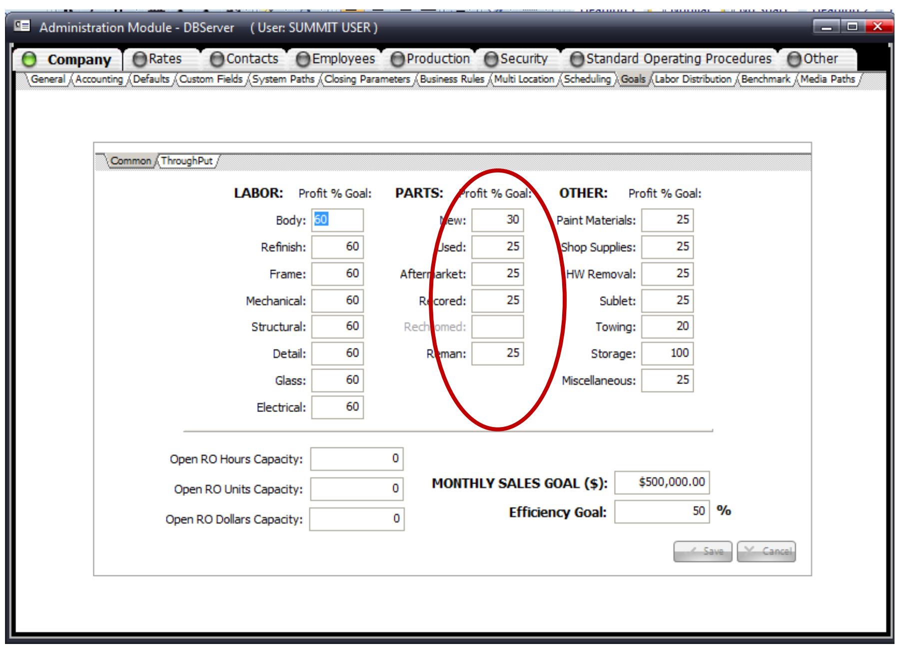
5. The *Calculate Cost* window will appear. Choose a percent margin and click *Save*.

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





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

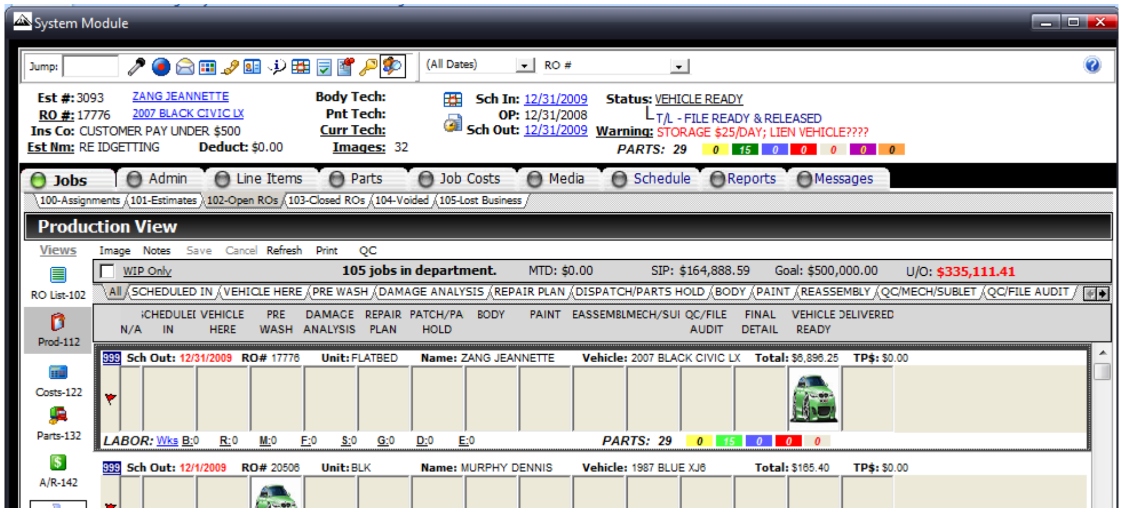


Vehicle Delivery

Vehicle Delivery Process

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

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



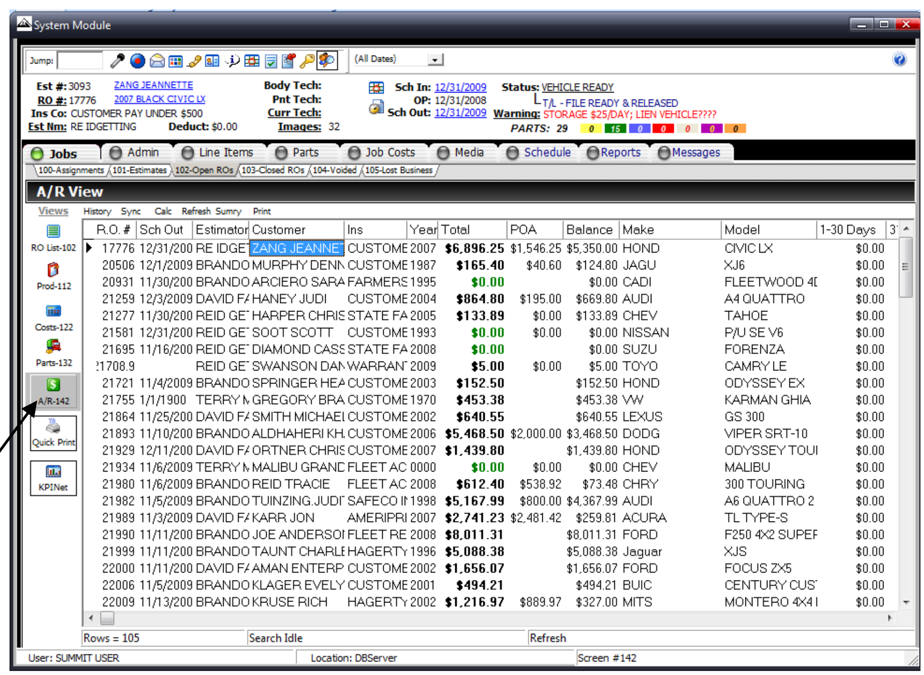
Customer Pay

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

1. Collect funds from customer and provide them with the following documents:

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

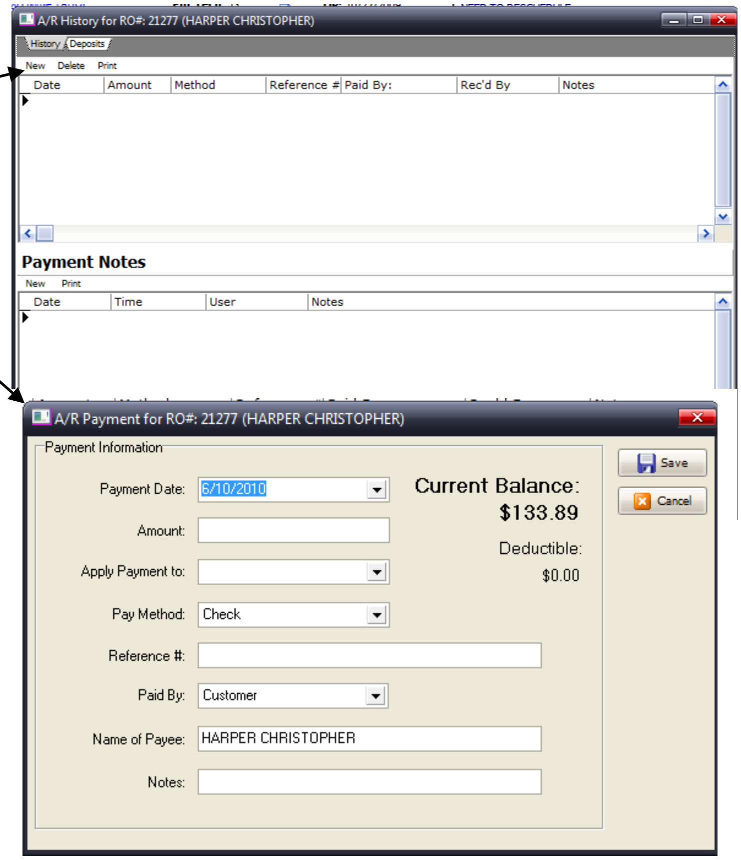
2. CSR to enter in payments into Summit software. "Click on" Accounts *Receivable View*.



3. Locate the customer name.

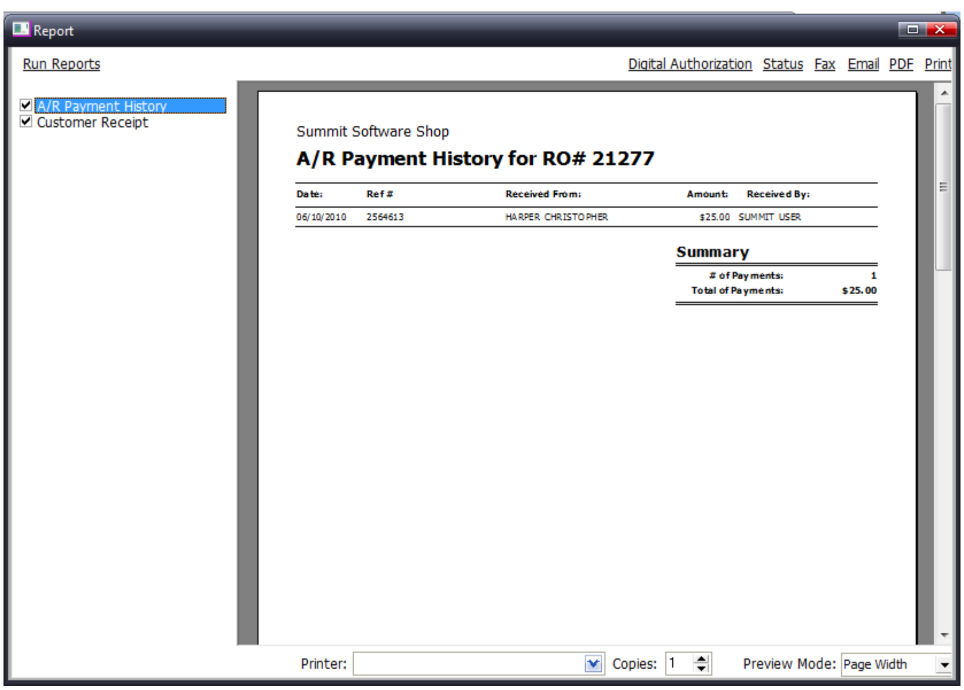
4. "Double Click" on the customer name and the following screen appears.

5. "Click on" the <u>New</u> link and the *Payment Screen* will appear.



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

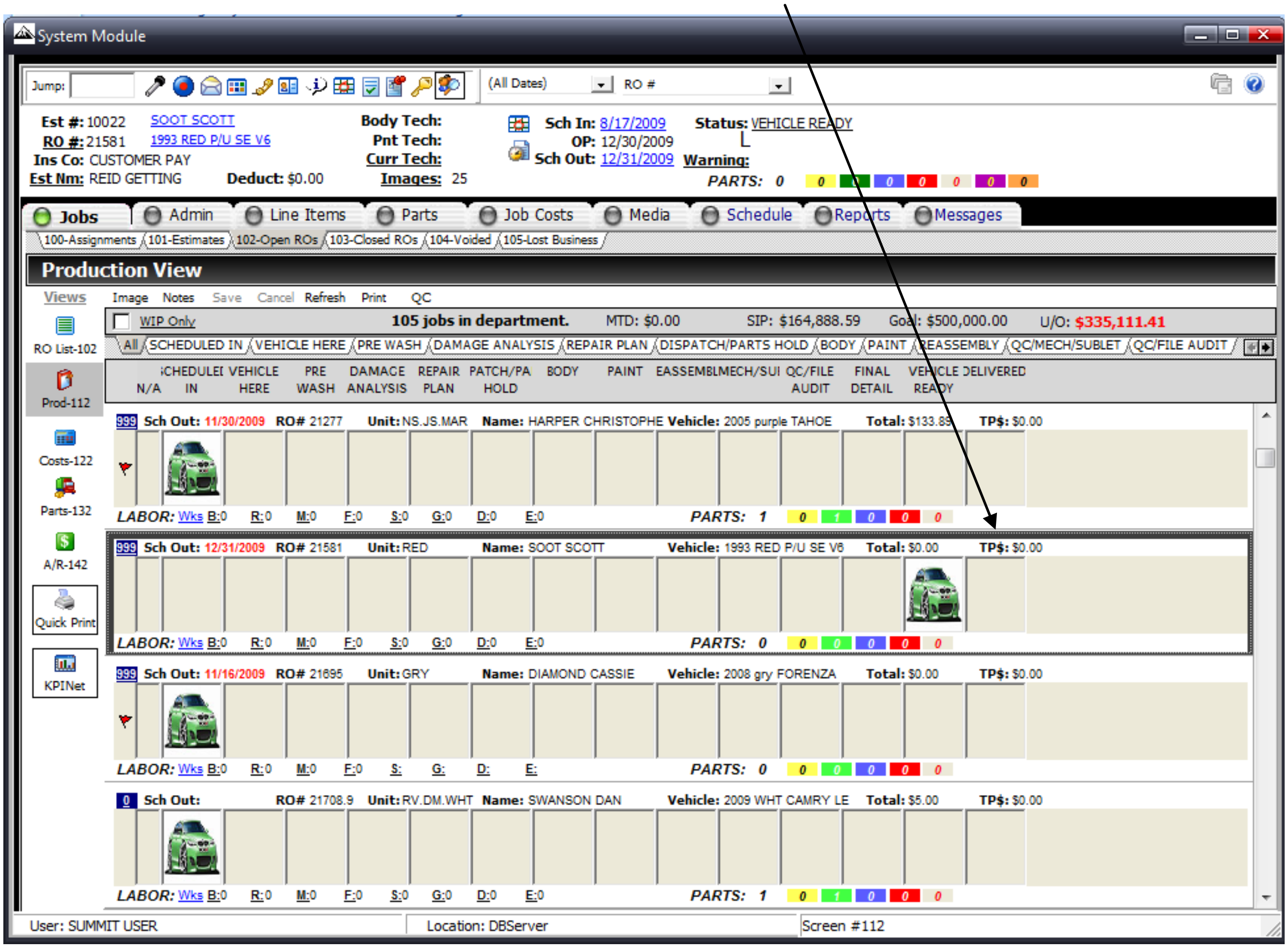
7. Once you have saved your entries, they will appear in the customer A/R history scree. Then you can "click on" the <u>Print</u> link and the Print dialog box will appear. Select the report(s) you would like to print and click <u>Run Reports.</u>



Vehicle Delivery Process (DRP)

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

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



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

1. CSR to collect funds from customer and provide them with the following documents:
    - Estimate
    - Summit Invoice W/ Rates
    - Summit Collision Centers and Insurance Warranty documents.

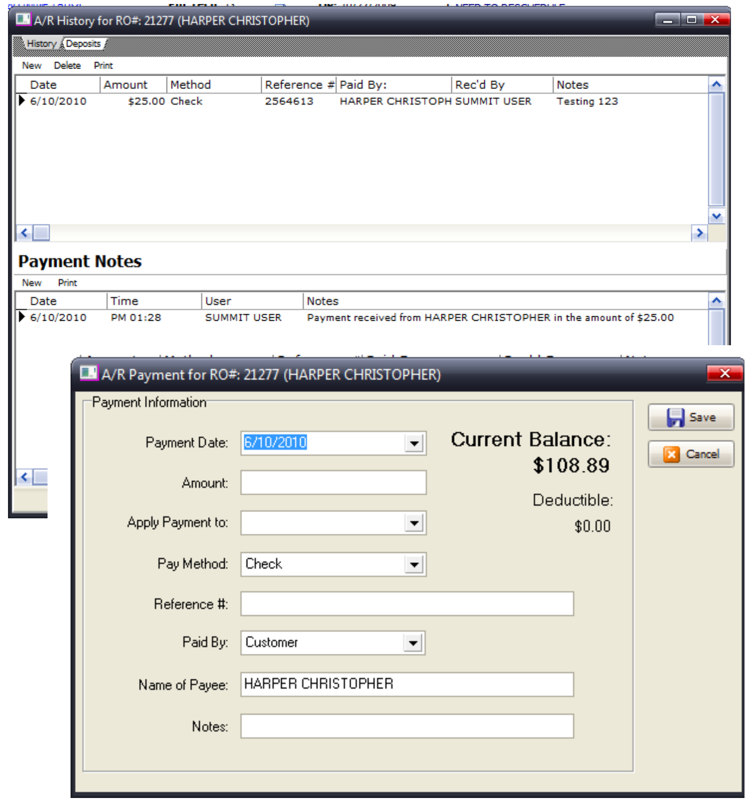
2. CSR to enter in payments into Summit software.

3. "Click on" *Accounts Receivable* Tab

4. Locate the customer name

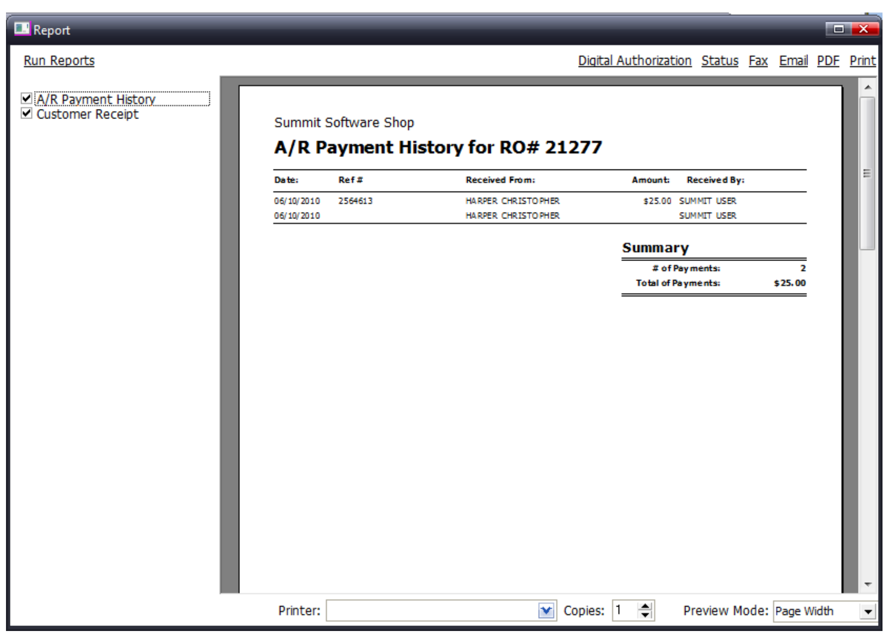
5. "Double Click" on the customer name and the following screen appears.

6. "Click on" the New Link and the Payment Screen will appear.



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

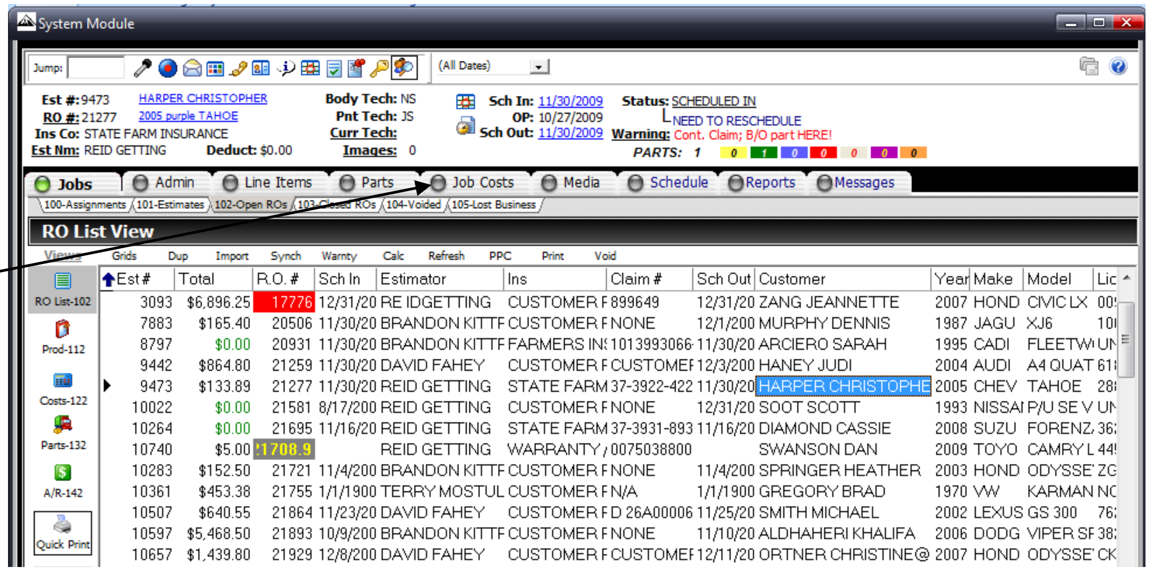
8. Once you have saved your entries "click on" the *PRINT ICON* and the Print dialog box will appear. Select *Customer Receipt and Print*. Print 2 copies.



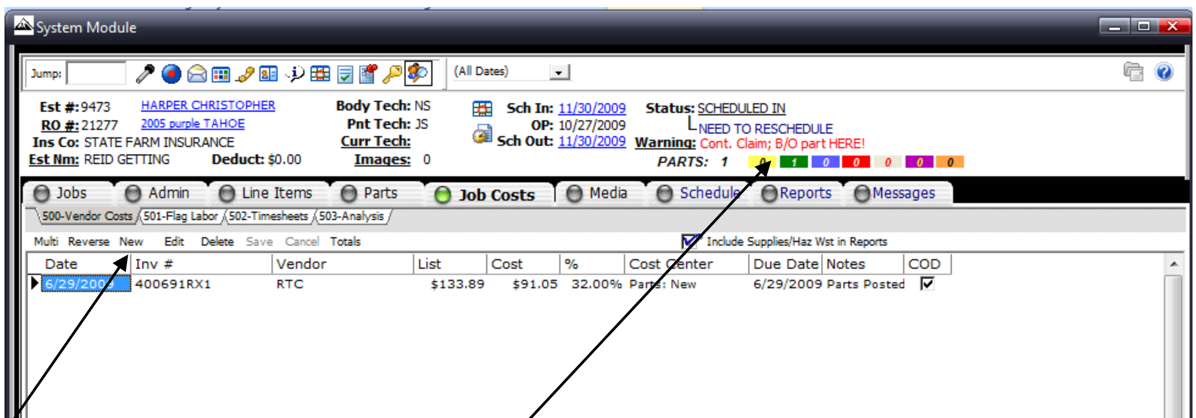
Pre-Close Process

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

2. Locate RO file.

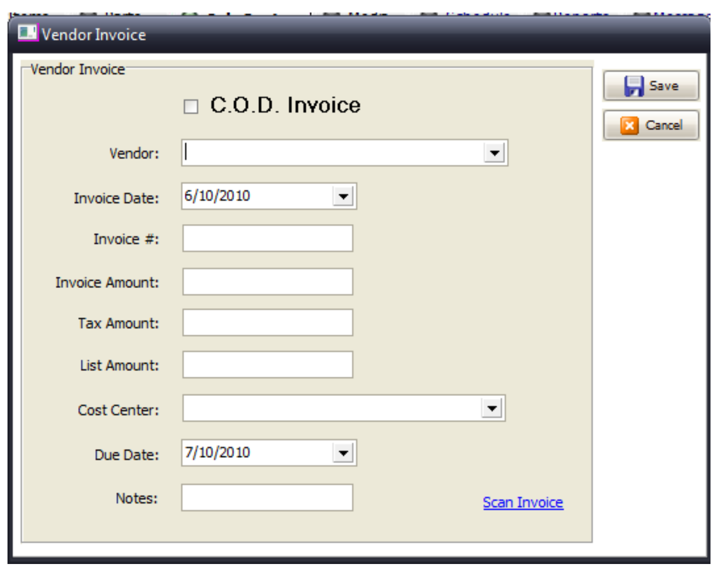


3. "Click on" *Job Cost Tab*. The screen below will appear.



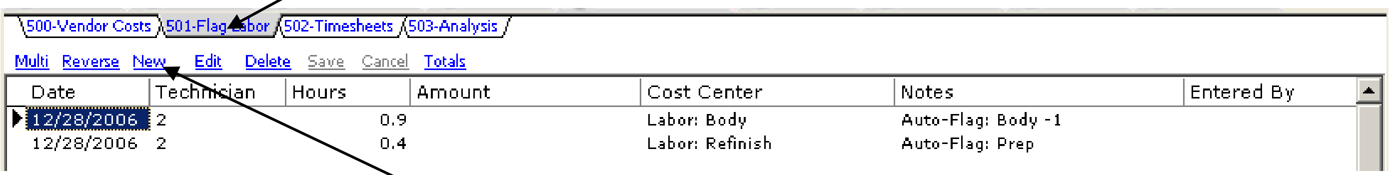
Open physical RO File and insure all invoices that are listed on screen are in the file. If the Estimators/File Handlers locate invoices in the file that are not on the screen the Estimators/File Handlers should look at the top of the screen to review the *Parts Status.* In most cases the Estimators/File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

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



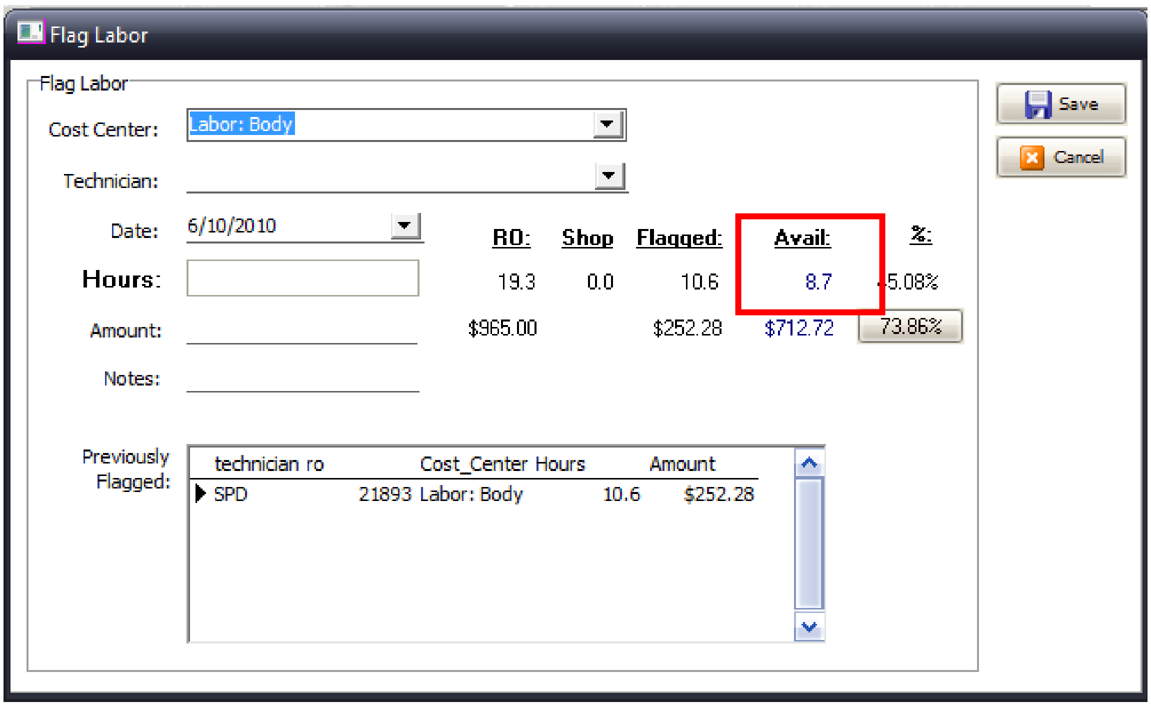
6. Enter in the appropriate invoice information.

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

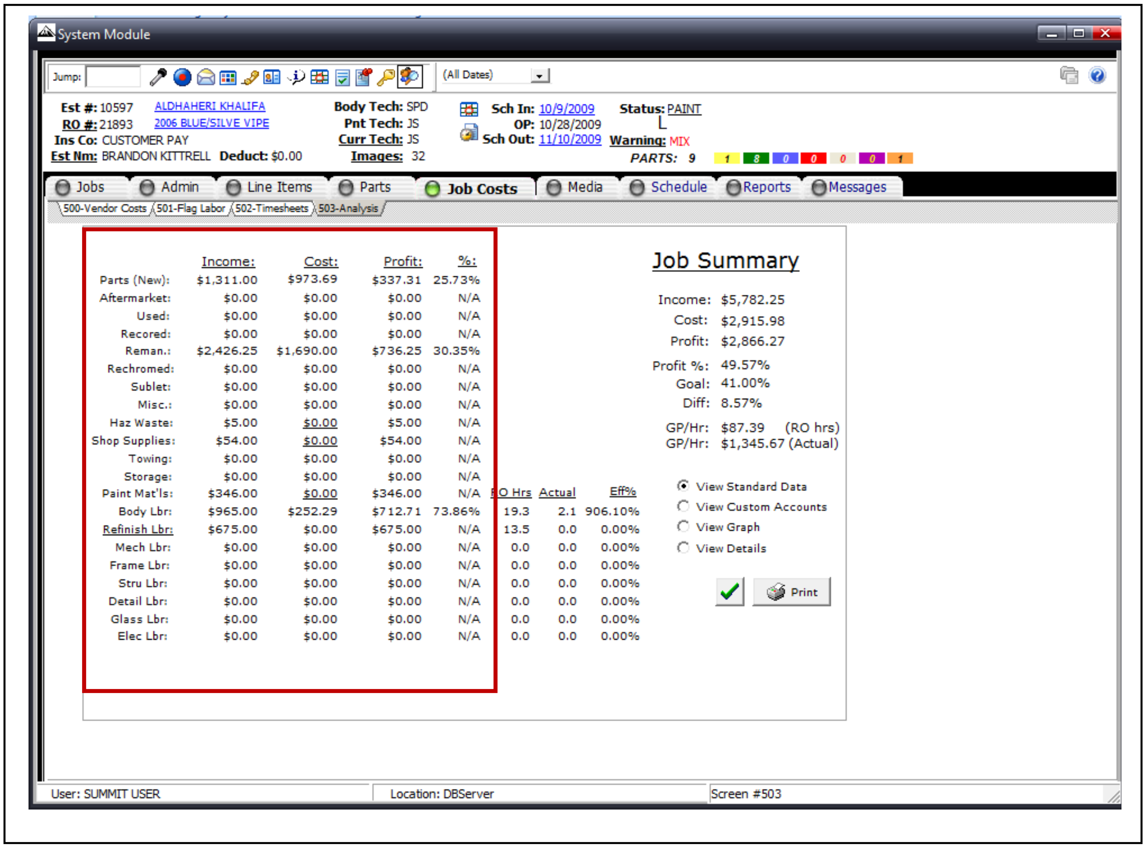


8. If the hours have not been flagged "click on" the New link and the flag labor screen will appear. Click on "Cost Center" drop down arrow and select *Labor: Body* and the system will display the # of hours that need to be flagged.

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



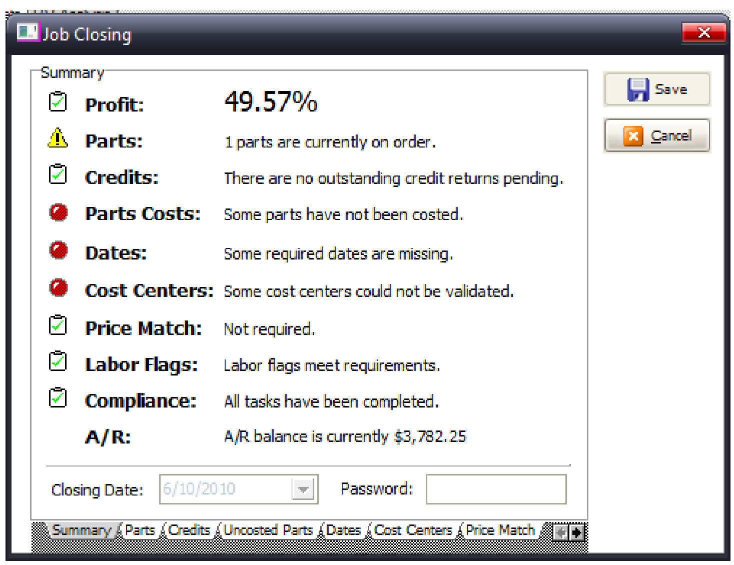
10. Select the *Analysis Tab*. Once the tab is selected the following screen will appear. The key here is to make sure that for EVERY *Income* there is an associated *Cost*. Also check for appropriate GP% in the Parts areas.



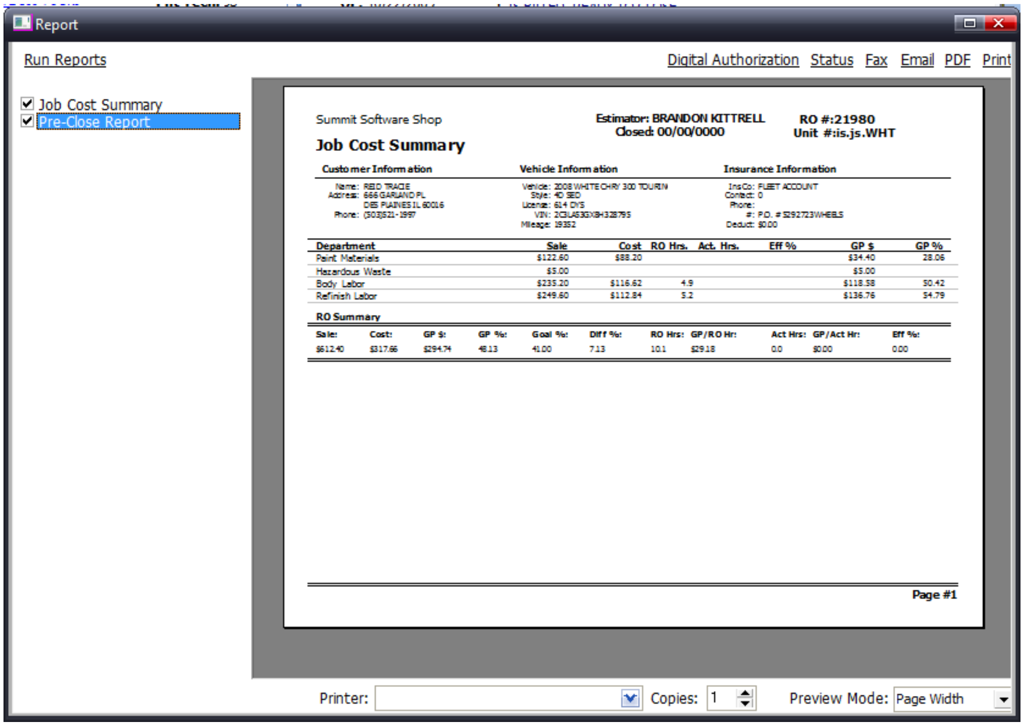
11. "Click on" the GREEN Check Mark. This will launch the following "pre-close" checklist.

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

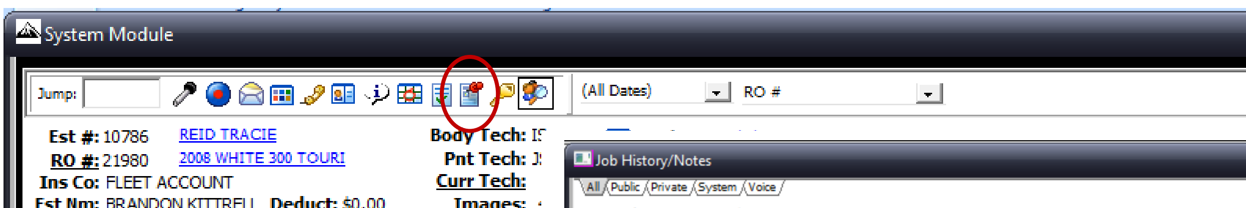
If an item has a **RED DOT** in front of it something has not been completed. To see what needs to be completed "click on" the *associated tab* at the bottom of this screen.



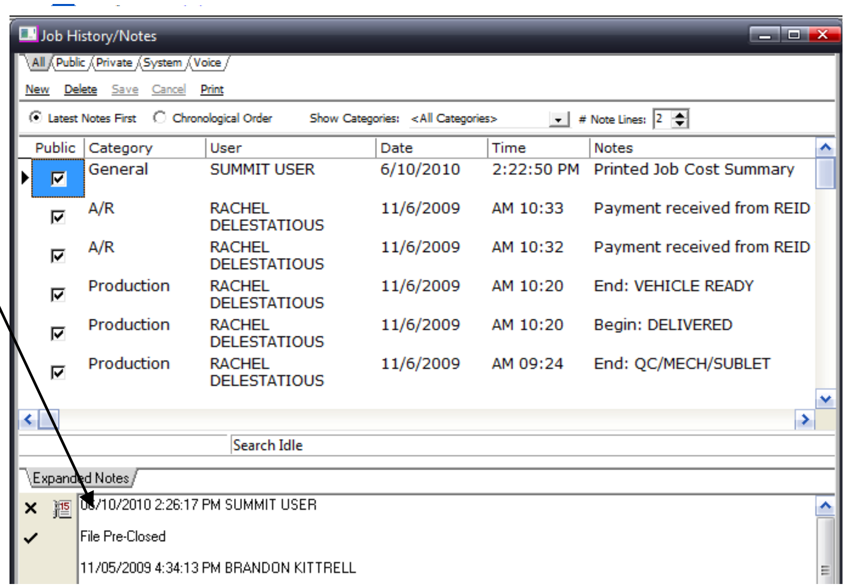
12. Once the "pre-close" process is complete you should select *PRINT* and print a *"Pre-Close" Report*.



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



Enter in a note *"File Pre-Closed".*



14. Print Customer Invoice:

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

15. Turn completed file over to CSR.

<u>NOTE</u>: All Files should include the following paperwork:

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

Synchronizing and Parts Price Changes

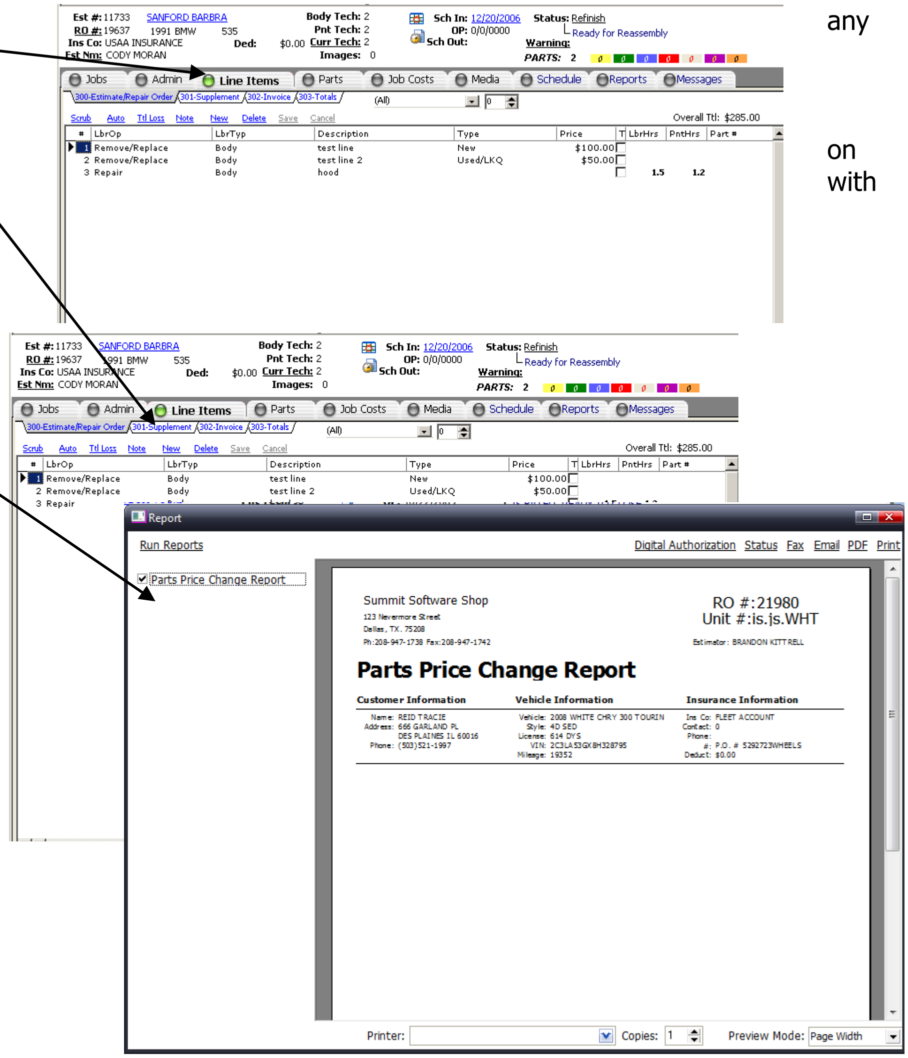
Synchronizing a Summit Repair Order with an Estimating System Supplement

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

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

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

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



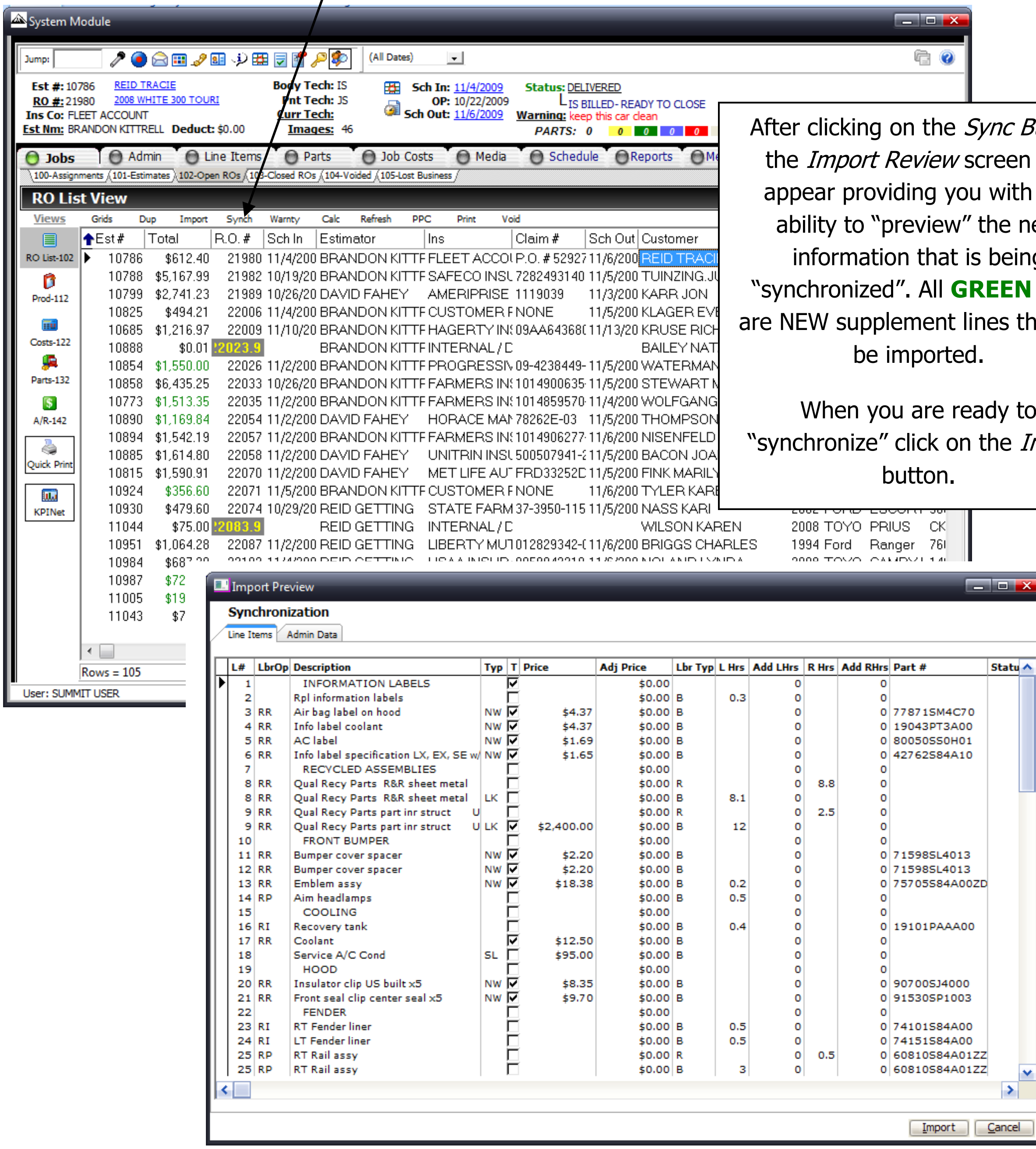
any

on

with

5. Create the export file in the estimating system.

6. Re-select the Repair Order in Summit and then click on the *Sync* button. This will automatically “grab” the changes made in the estimating system and “synchronize” them with your P-Page Estimating system.



After clicking on the *Sync Button* the *Import Review* screen will appear providing you with the ability to “preview” the new information that is being “synchronized”. All **GREEN** lines are NEW supplement lines that will be imported.

When you are ready to “synchronize” click on the *Import* button.

Summit’s Unique “Synchronization” process eliminates Estimate/Repair Order “Ping Pong”. This feature alone could help you eliminate up to 30 minutes per Repair Order.

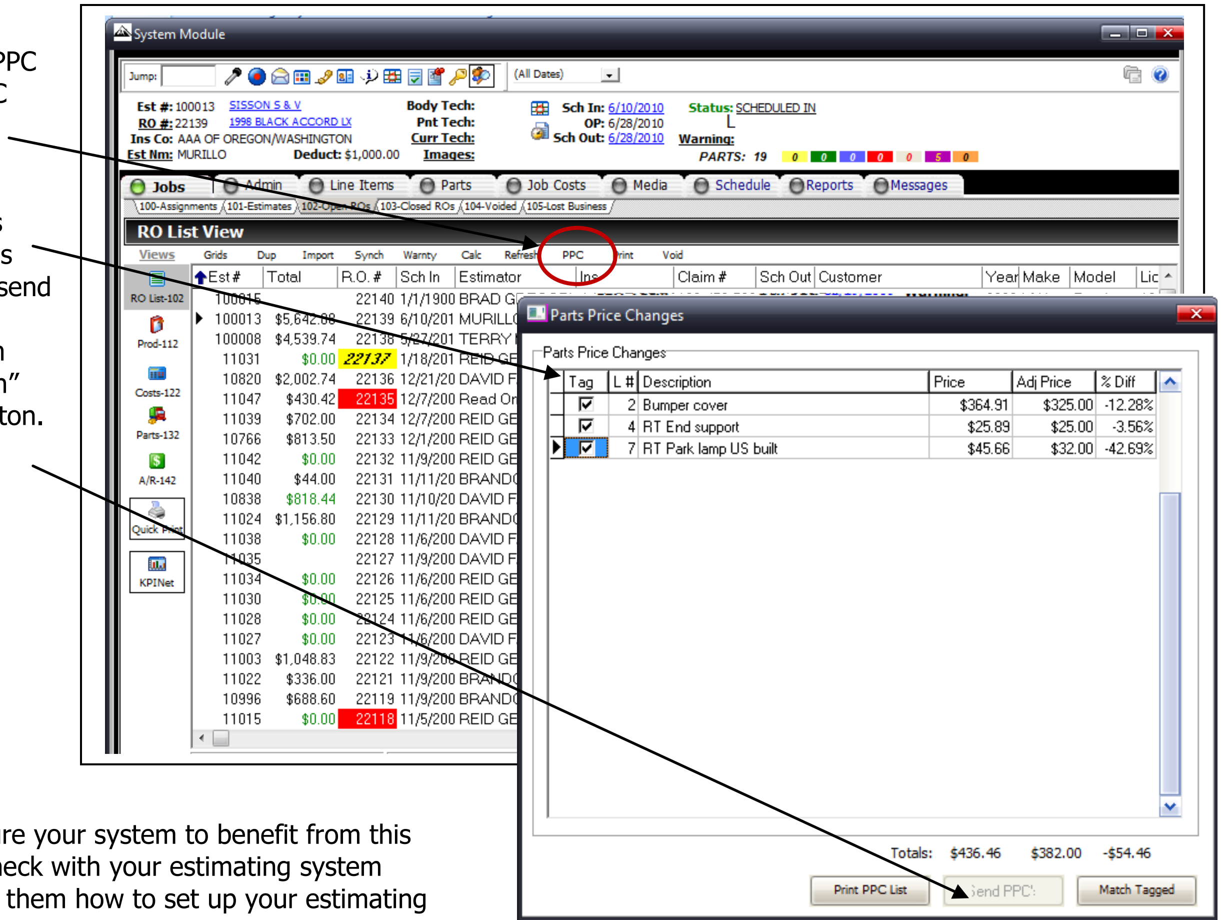
Sending Parts Price Changes BACK into Your Estimating Systems

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

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

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

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

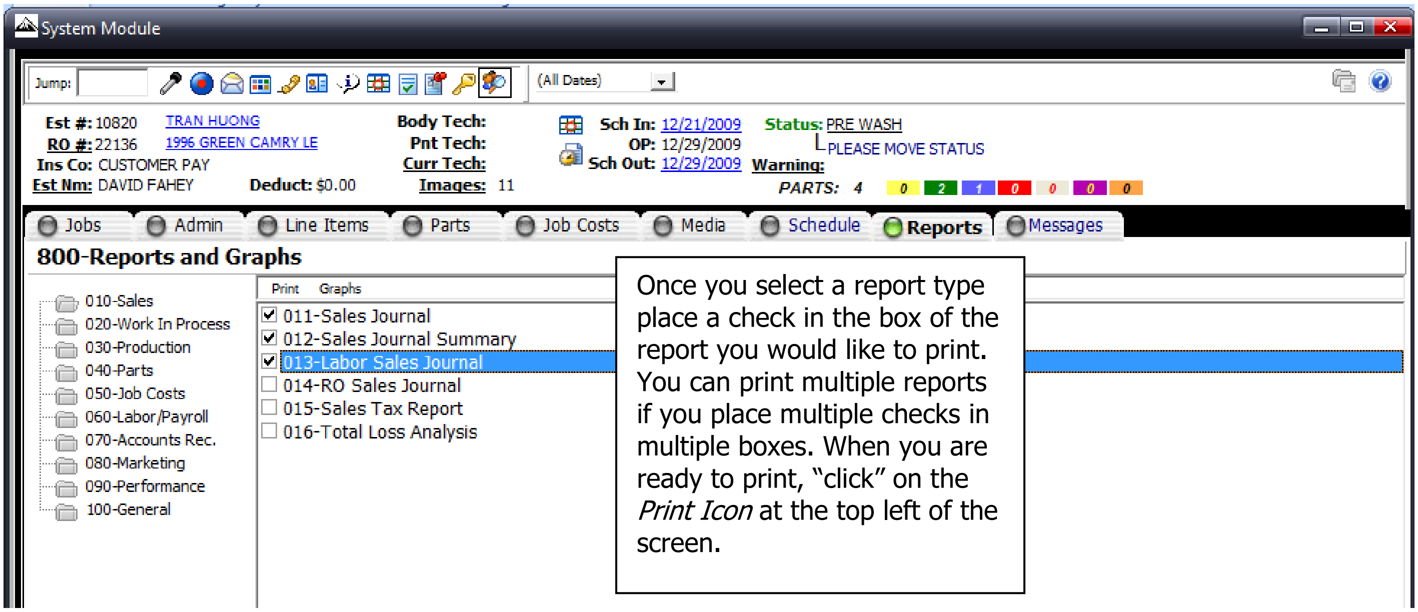


NOTE: to configure your system to benefit from this feature, please check with your estimating system company and ask them how to set up your estimating system to accept PPC's from Summit.

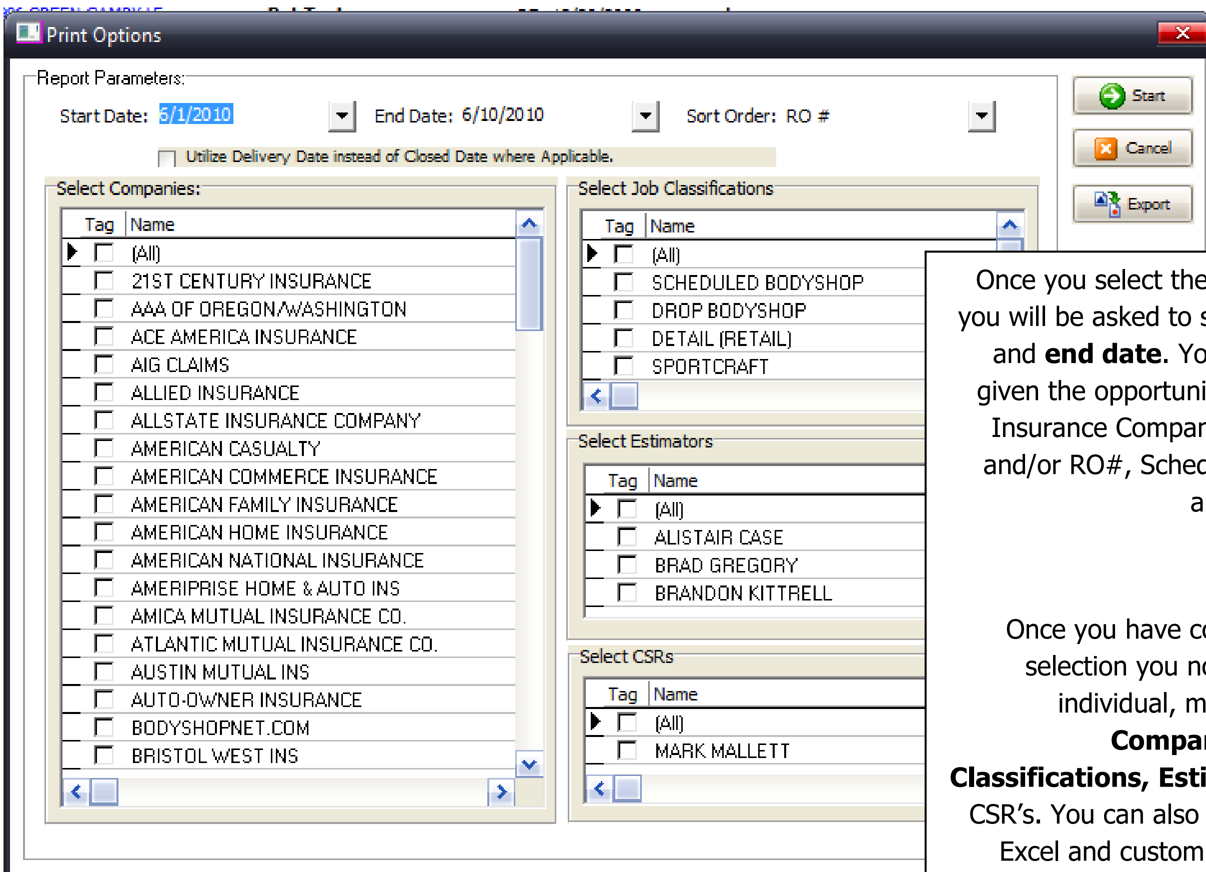
Accessing and Utilizing Reports

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

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



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



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

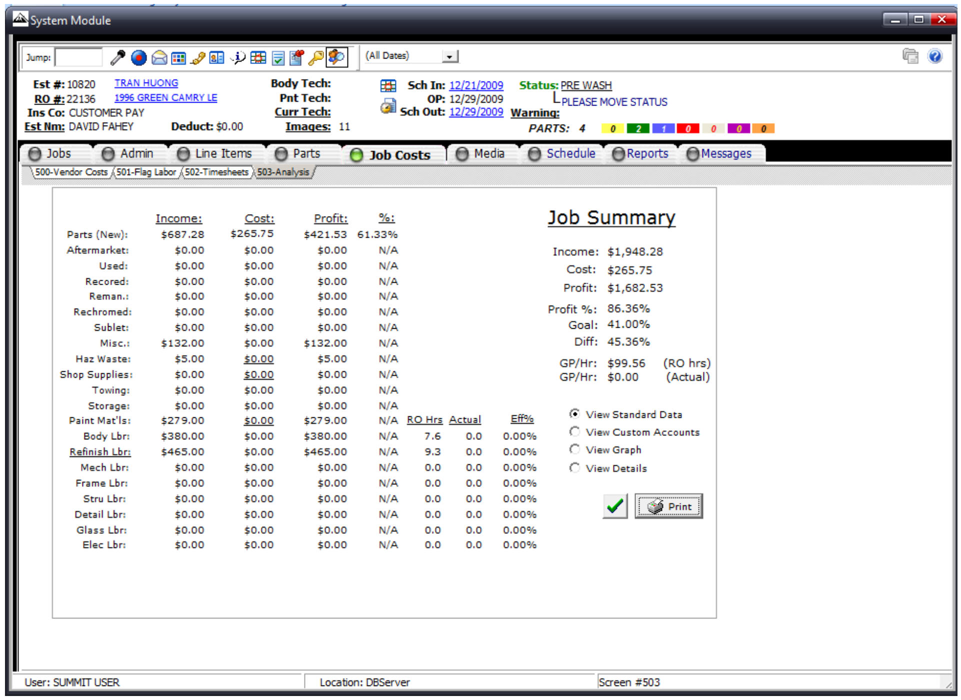
Once you have completed this selection you now can select individual, multiple, or **All Companies**, **Repair Classifications, Estimators**, and CSR's. You can also any report to Excel and customize it for your needs!

Recommended Reports: RO Reports

Job Cost Analysis

To review the profitability of each Repair Order review the *RO Job Cost Analysis.* To access this report, locate the Repair Order, select the *Job Costs* tab, and select the *Analysis* tab.

This report can also be printed by clicking the Print button.



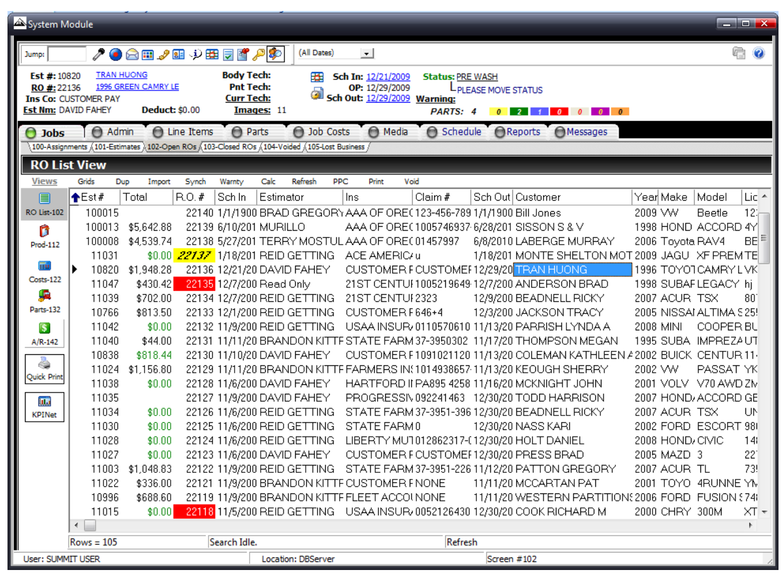
Overall Gross Profit

1. To review the Overall Gross Profit of all Open Repair Orders select the *Job Cost View*.

2. This view will provide you with an overall GP% view of all Open Repair Orders. If the RO is **GREEN** then it is presently within your GP% goals.

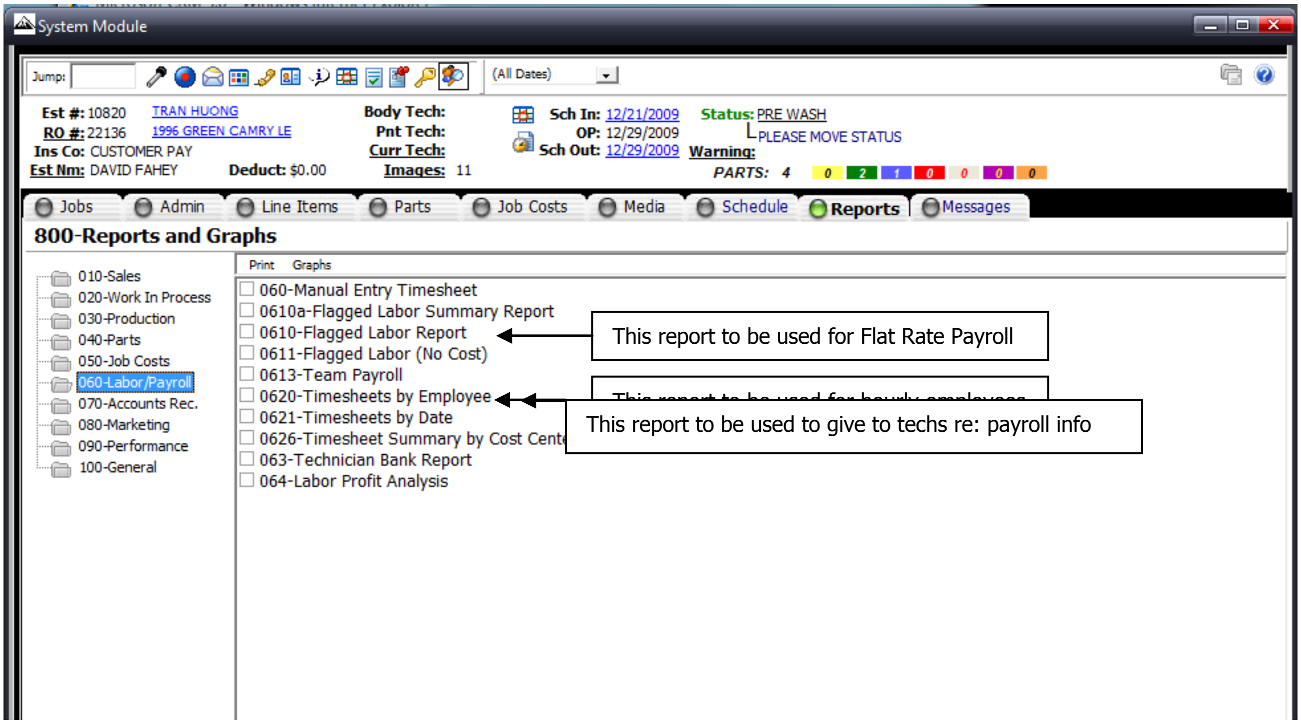
Note: Goals must be set in the Administration Module

3. If the RO is **RED** then it presently DOES NOT meet your GP% goals of 45% and 60%. To look into more details on a specific RO "double click" on that specific RO and you will be taken to the *JOB COST* tab. Once inside the JOB COST tab you can evaluate all costs on the repair order.

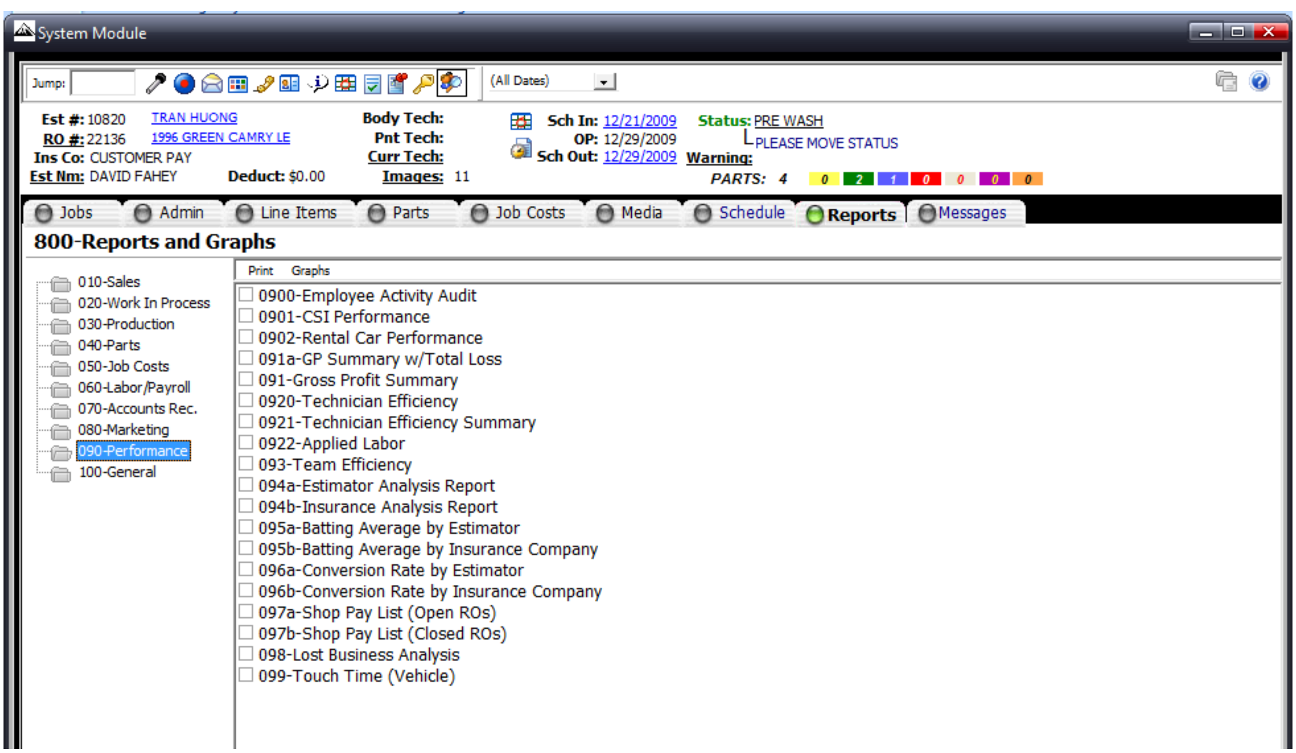


Recommended Reports: Daily, Weekly, Monthly Reports

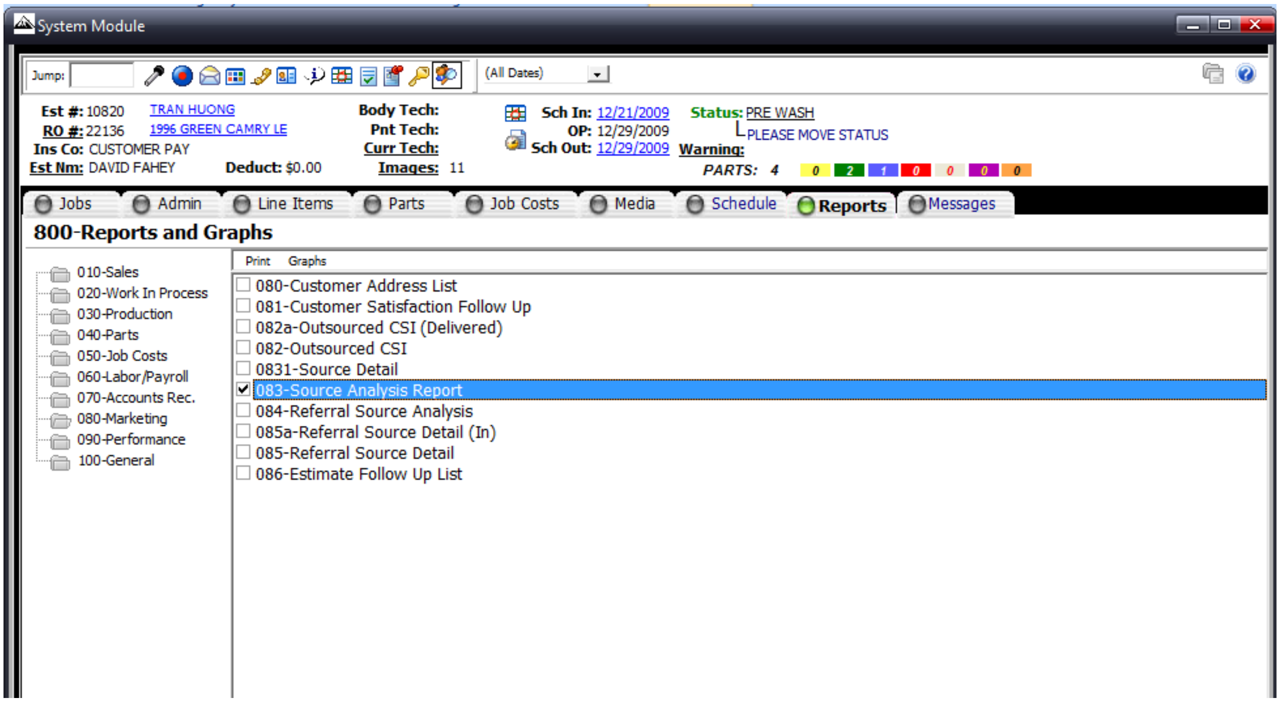
Weekly Payroll



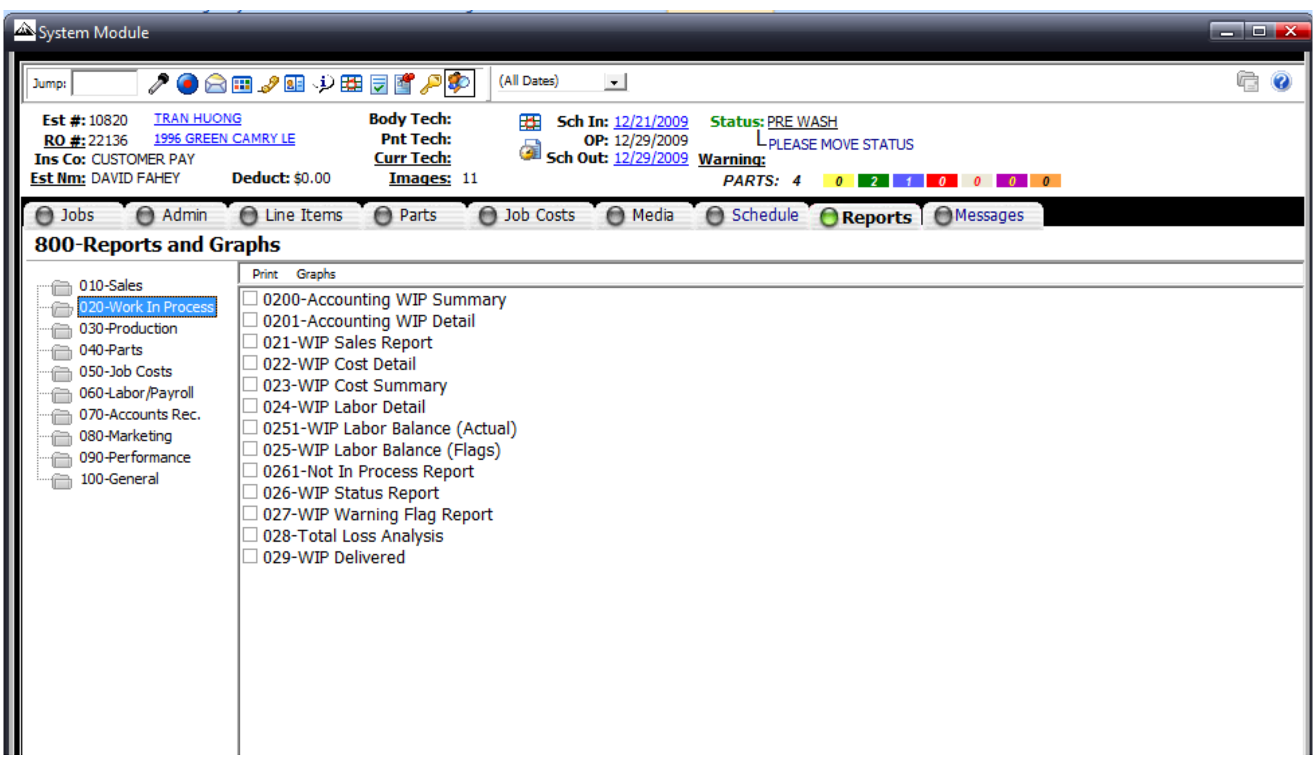
Sales and Gross Profit: Weekly



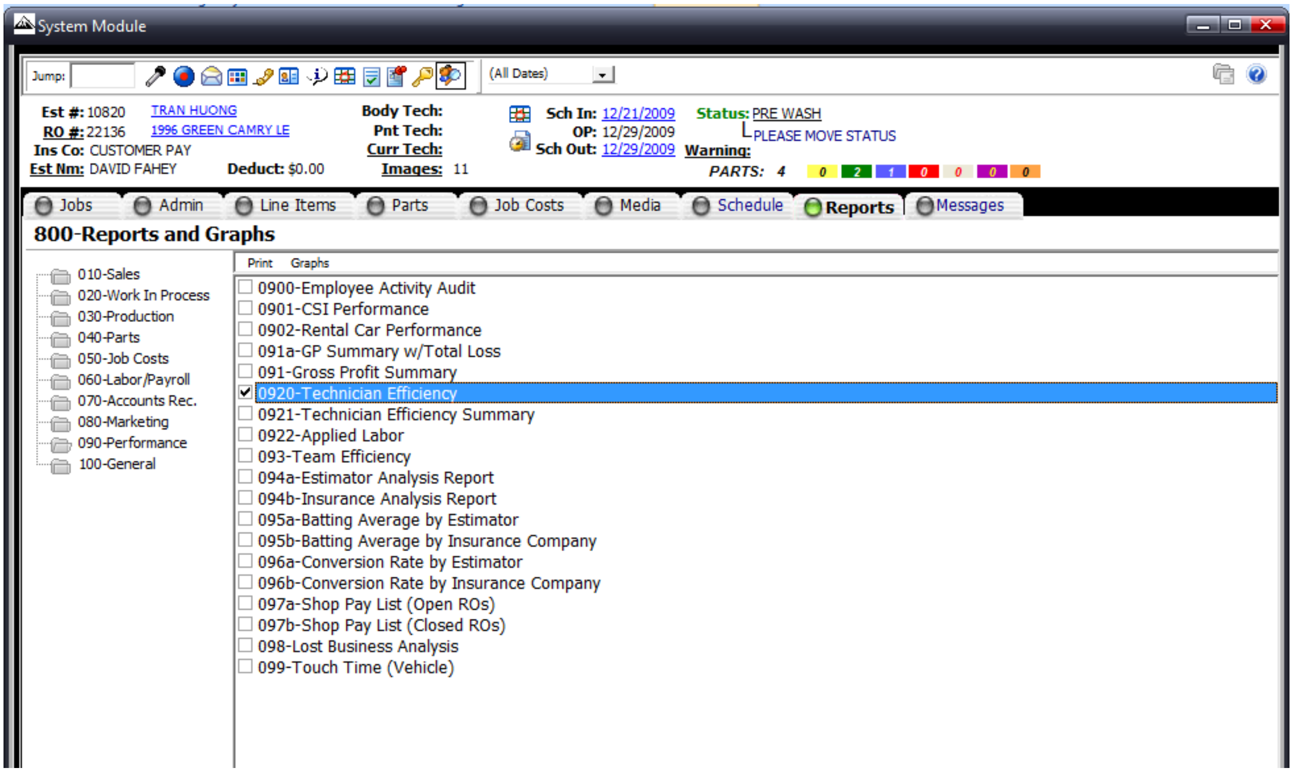
Sales and Marketing: Weekly



Work in Process: Monthly



Technician Efficiency: Weekly



Payment Report: Daily