



208.947.1738
www.summitcrs.net

ReportPro Training & Reference Guide

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What Is Report Pro

ReportPro replaces the old reporting tab. ReportPro allows simple customization of reports to fit specific users needs allowing adding/removing columns and unlimited grouping and filtering. In short, it allows you to customize the current report list the way YOU want them. It can also be used as an MSO enabled advanced reporting system.

ReportPro generally mirrors the Reporting tab. Because of the flexibility in customizing reports, some reports have been combined.

Setting Up Report Pro

When you first log in to ReportPro, you will need to set your location(s). To do so, highlight "Local Host" click on the "E" for Edit and 1) Name the Location: and 2) Type in the IP Address and port that you see on the SummitCRS Login screen and the DBName that matches the DBName in the Summit client setup (this can be launched by clicking on the blue IP address on the login screen).

The screenshot shows the ReportPro Advanced Reporting interface. On the left, there is a 'Location' list with 'Local Host' selected. Below it are report categories like '0100-Sales' and '0110-Sales Journal'. At the bottom left, there are 'Date Selection' and 'Export Options' sections. A 'Location' dialog box is open in the center, with fields for 'Location Name' (Local Host), 'IP Address' (172.17.1.48), 'Port' (3306), and 'DBName' (summitdb). Below this is a 'Server Configuration' window showing a table of available servers. A red circle highlights the 'summitdb' entry in the 'DBName' column. At the bottom, the Summit login screen is shown with a red circle around the 'Location: Assauld' field.

IP	Port	DBName
172.17.1.48	3306	summitdb
172.17.1.48	3306	landofevil
172.17.1.83	3306	qc2
172.17.1.83	3306	

After applying the location name, IP address, and port, click on the "E" for Edit and then click on the "C" for Connect. This will apply the location name, IP

Click save and then you can highlight the location name and click "C" for Connect. You will see the folder with a green checkmark on it that will indicate it is connected. If there is NOT a green check on the folder, the location is NOT active.

Report Pro Basics

The reports in Report Pro basically mirror the reports in SummitCRS screen 800. HOWEVER, ReportPro has additional functionality and flexibility.

“A” is to Add locations

“E” is to Edit locations

“R” is to Remove locations

“C” is to Connect locations

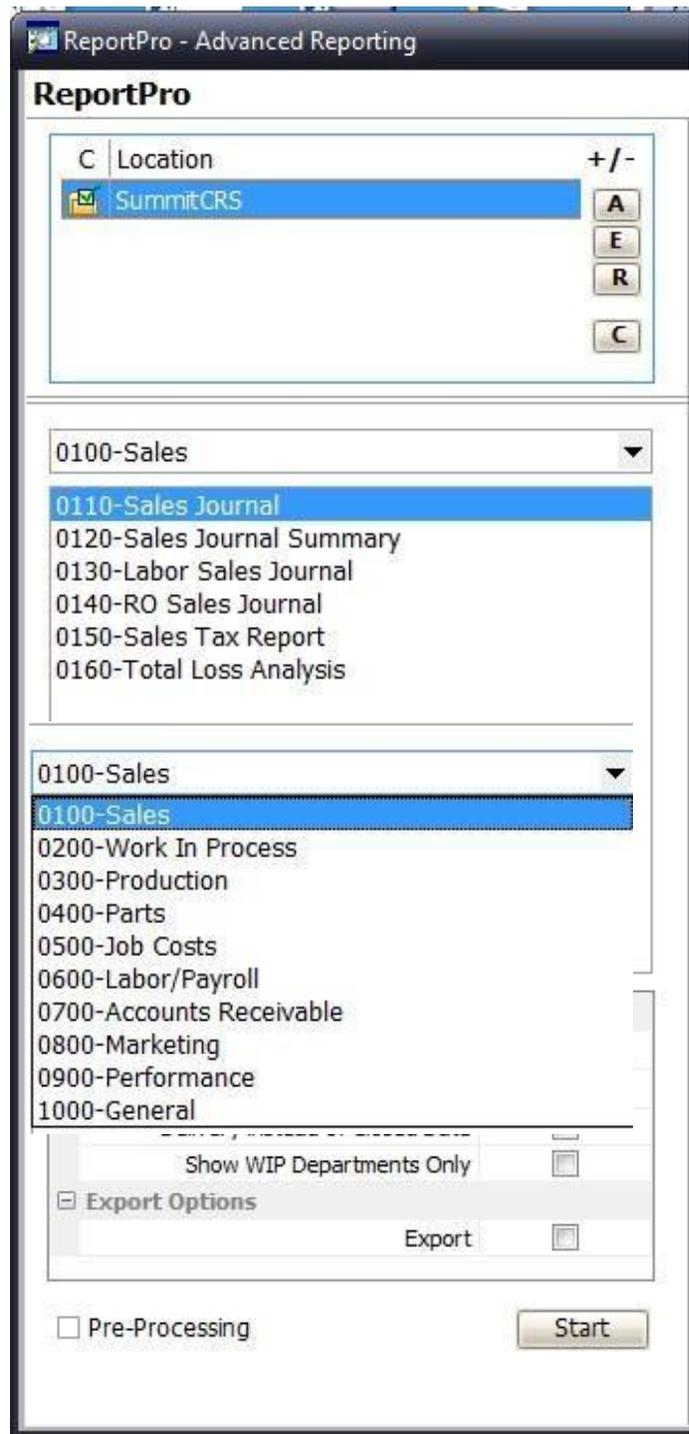
The +/- allows you to Expand/Collapse the Location List (MSO feature)

You can add additional locations by clicking the “A” and setting the Location, IP, and port and then clicking “C” to connect.

The Dropdown arrow allows you to choose from the list of “grouped” reports.

Simply choose the “group” and the reports inside will display below.

You can choose your dates by clicking on the actual date.



In ReportPro you can choose to run reports that are Closed Date driven instead by Delivery Date by checking box. **

<input type="checkbox"/> Date Selection	
Start Date:	7/1/2015
End Date:	7/22/2015
Delivery instead of Closed Date	<input type="checkbox"/>
Show WIP Departments Only	<input type="checkbox"/>
<input type="checkbox"/> Export Options	
Export	<input type="checkbox"/>

**NOTE: not all reports are Closed Date driven: here is a list: <http://www.summitcrs.net/pdf/reportsguide.pdf>

You can also filter by WIP Departments.

By checking the “Export” box you can choose to export the chosen report to: CSV, Txt, Excel, XML or HTML

Pre-Processing

By checking the Pre-Processing box prior to running a report it will launch the Pre-Processing screen that allows you to filter as you'd like prior to printing the chosen report.

ReportPro

C Location +/-
SummitCRS A
E
R
C

0100-Sales
0110-Sales Journal
0120-Sales Journal Summary
0130-Labor Sales Journal
0140-RO Sales Journal
0150-Sales Tax Report
0160-Total Loss Analysis

Date Selection
Start Date: 4/1/2013
End Date: 4/22/2014
Delivery instead of Closed Date
Show WIP Departments Only

Export Options
Export

Pre-Processing Start

Pre-Processing

Select Companies:

Tag	Name
<input checked="" type="checkbox"/>	(All)
<input type="checkbox"/>	Agincourt Autohaus Inc.
<input type="checkbox"/>	AIG Insurance
<input type="checkbox"/>	Allstate Insurance
<input type="checkbox"/>	Applewood Chevrolet Cadillac
<input type="checkbox"/>	ARI Financial
<input type="checkbox"/>	Assured North York Collision
<input type="checkbox"/>	Assured Toryork Collision Inc
<input type="checkbox"/>	Assured Vaughan Mechanical
<input type="checkbox"/>	ATTRELL TOYOTA
<input type="checkbox"/>	Aviva Canada
<input type="checkbox"/>	Aviva Pilot - Hamilton
<input type="checkbox"/>	Axa Insurance
<input type="checkbox"/>	Bell Canada
<input checked="" type="checkbox"/>	C.A.A. Insurance Thornhill
<input checked="" type="checkbox"/>	C.G.I. - Belleville
<input checked="" type="checkbox"/>	C.G.I. - Kingston
<input checked="" type="checkbox"/>	C.G.I. - Markham
<input type="checkbox"/>	C.G.I. - Montreal
<input type="checkbox"/>	C.G.I. - Ottawa
<input type="checkbox"/>	CEI Fleet Services
<input type="checkbox"/>	Chubb Insurance
<input type="checkbox"/>	CNA Insurance
<input type="checkbox"/>	Co-operators Ins.
<input type="checkbox"/>	Crawford Adjusters
<input type="checkbox"/>	Crawford Adjusters - Aviva
<input type="checkbox"/>	Crawford Adjusters - Economica
<input type="checkbox"/>	Cumis General Insurance

Select Job Classifications

Tag	Name
<input type="checkbox"/>	(All)
<input checked="" type="checkbox"/>	Pending Classification
<input checked="" type="checkbox"/>	Dealer Parts
<input checked="" type="checkbox"/>	0-10 Hours
<input type="checkbox"/>	11-20 Hours
<input type="checkbox"/>	21-30 Hours
<input type="checkbox"/>	Over 30 Hours
<input type="checkbox"/>	Warranty Repair
<input type="checkbox"/>	Total Loss Vehicle

Select Estimators

Tag	Name
<input type="checkbox"/>	(All)
<input checked="" type="checkbox"/>	Adrian Carelli
<input checked="" type="checkbox"/>	Bill Buckley
<input checked="" type="checkbox"/>	Charlie DeHaseth
<input checked="" type="checkbox"/>	John Costa
<input checked="" type="checkbox"/>	John DiGirolamo
<input type="checkbox"/>	Matias Veneces
<input type="checkbox"/>	Mike Scono

Select CSRs

Tag	Name
<input type="checkbox"/>	(All)
<input checked="" type="checkbox"/>	Adrian Carelli
<input checked="" type="checkbox"/>	Charlie Dehaseth
<input type="checkbox"/>	John Costa

Then click "Start" to run your report

Report Pro Flexibility

ReportPro allows you to manipulate “standard” reports and customize those reports to your specific needs.

Grouping

You can “group” by clicking on and dragging a column header up in to the white space and then expand/collapse by clicking on the + or -

0140-RO Sales Journal

Portrait Landscape Print Save

Drag a column header here to group by that column

RO Date	RO #	Customer	Estimator	Insurance Co	Total Billed	Paid	Balance
4/1/2013	2400799	MAPLE DRYWALL	John DiGirolamo	Customer Pay	\$1,777.26	\$1,777.26	
4/4/2013	2400813	ASSURED MECHANICAL	John DiGirolamo	Assured Vaughan I	\$921.97		
5/13/2013	2400893	WINDOW HARDWARE CO	John DiGirolamo	Customer Pay			
5/17/2013	2400908	FRANCELLA DE LEAL LUIG	John DiGirolamo	Intact Insurance -	\$3,462.73	\$3,462.73	
5/17/2013	2400909	WAUGH ADAM	John DiGirolamo	Intact Insurance -	\$2,602.97	\$2,602.97	
5/22/2013	2400919	BIFOLCHI ATTILIO	John DiGirolamo	Unica Insurance In	\$860.38	\$860.38	
5/28/2013	2400937	ASSURED VAUGHAN MECI	John DiGirolamo	Assured Vaughan I	\$1,211.93		
6/3/2013	2400950	Langlois Raynald	John DiGirolamo	CEI Fleet Services	\$1,196.04	\$1,196.04	
6/5/2013	2400962	Mcintyre Bryan	John DiGirolamo	CEI Fleet Services	\$2,959.66	\$2,959.66	
6/10/2013	2400973	Grande Cheese	John DiGirolamo	Customer Pay	\$3,893.96	\$3,893.96	
6/18/2013	2400989	PALOMBI NINA	John DiGirolamo	Economical Insurar	\$764.42	\$764.42	
6/28/2013	2401022	GUIDA LUCIA	John DiGirolamo	Intact Insurance -			
7/4/2013	2401034	Wilson Nicholas	Charlie DeHaseth	Customer Pay	\$2,823.81	\$2,823.81	
7/20/2013	2401085	VIRJI ADIL	John DiGirolamo	Intact Insurance -	\$3,304.62	\$3,304.62	
7/25/2013	2401103	Gorga Jose Mauricio	John DiGirolamo	CEI Fleet Services	\$3,369.82	\$3,369.82	
7/27/2013	2401107	ADEJOBI EDEN O	John DiGirolamo	TD Home & Auto J	\$1,437.47	\$1,437.48	
7/29/2013	2401111	Tucci Frank	John DiGirolamo	CEI Fleet Services	\$3,241.97	\$3,241.97	
7/30/2013	2401123	MICELI MARCELLO	John DiGirolamo	Intact Insurance -	\$1,127.34	\$1,127.43	
7/31/2013	2401125	GRUBA MARIJUSZ	John DiGirolamo	Security National Ir	\$4,624.25	\$4,624.25	
7/31/2013	2401127	ZANUZZI ALDO	John DiGirolamo	Intact Insurance -	\$3,028.57	\$3,028.57	
8/1/2013	2401128	NARDINI-ZITELLA BARBAR	John DiGirolamo	Security National Ir	\$5,685.11	\$5,685.11	
8/8/2013	2401142	Bridgette Smith	John DiGirolamo	Personal/Certas Ins	\$4,219.70	\$4,219.70	
8/8/2013	2401145	SOU JOYCE	John DiGirolamo	Security National Ir	\$708.51	\$708.51	
8/9/2013	2401148	TD BANK (COLANGELO LP	John DiGirolamo	TD General Insurar	\$3,661.48	\$3,661.48	
8/14/2013	2401169	HARPLEY, DAVID *	John DiGirolamo	Economical Insurar			
8/14/2013	2401170	HARPLEY, CHAD *	John DiGirolamo	Economical Insurar			
8/16/2013	2401176	BALDASSARRE LUCIA	John DiGirolamo	Intact Insurance -	\$2,455.24	\$2,455.24	
8/20/2013	2401192	SIGGIA ROSANNA	John DiGirolamo	Personal/Certas Ins	\$1,274.33	\$1,274.33	

0140-RO Sales Journal

Portrait Landscape Print Save

Estimator

RO Date	RO #	Customer	Insurance Co	Total Billed	Paid	Balance
+ Estimator : Adrian Carelli						
- Estimator : Charlie DeHaseth						
7/4/2013	2401034	Wilson Nicholas	Customer Pay	\$2,823.81	\$2,823.81	
1/23/2014	2401716	Grand Touring Automobile	Grand Touring Aut	\$239.00		
- Estimator : John Costa						
9/13/2013	2401251	BEBEN CHRISTINE	Customer Pay	\$954.85	\$954.85	
+ Estimator : John DiGirolamo						

Filtering

You can filter any of the columns by clicking on the “down arrow” to the far right of each column and choosing your filter. (Below “Insurance Co is filtered) To revert back to normal, simply click “(All).”

You can even remove or add available columns to the print list by clicking in the top, left-hand corner of the columns list and checking/unchecking the options you desire.

0140-RO Sales Journal

Portrait Landscape Print Save

Drag a column header here to group by that column

RO Date	RO #	Estimator	Customer	Insurance Co	Total Billed	Paid	Balance
10/28/2013	2400799	John DiGirolamo	MAPLE DRYW	(All)	\$1,777.26	\$1,777.26	
10/28/2013	2400893	John DiGirolamo	WINDOW HA	(Custom...)			
10/28/2013	2400973	John DiGirolamo	Grande Chees	<input type="checkbox"/> AIG Insurance	\$3,893.96	\$3,893.96	
10/28/2013	2401034	Charlie DeHaseth	Wilson Nichol	<input type="checkbox"/> ARI Financial	\$2,823.81	\$2,823.81	
10/28/2013	2401198	John DiGirolamo	PAOLA MUZY	<input type="checkbox"/> Allstate Insurance	\$2,314.90	\$2,314.90	
10/28/2013	2401251	John Costa	BEBEN CHRIS	<input type="checkbox"/> Assured Vaughan Mechanical	\$954.85	\$954.85	
10/28/2013	2401402	Adrian Carelli	DE FRANCESC	<input type="checkbox"/> Aviva Pilot - Hamilton	\$169.50	\$169.50	
10/28/2013	2401419	Adrian Carelli	Bowden Elea	<input type="checkbox"/> C.A.A. Insurance Thornhill	\$300.00	\$300.00	
10/28/2013	2401420	Adrian Carelli	Rinomato Elis	<input type="checkbox"/> CEI Fleet Services	\$4,800.33	\$4,747.33	
11/11/2013	2401473	Adrian Carelli	PATEL ALEX	<input type="checkbox"/> Co-operators Ins.	\$1,130.88	\$1,130.88	
11/22/2013	2401513	Adrian Carelli	Oliva Tony	<input type="checkbox"/> Customer Pay	\$2,994.66		
12/9/2013	2401553	Adrian Carelli	Brad Meloche	Customer Pay	\$284.59	\$284.59	
12/12/2013	2401564	Adrian Carelli	Reda Joe	Customer Pay	\$576.30	\$576.30	
12/13/2013	2401565	Adrian Carelli	Doiron Norm	Customer Pay	\$928.75		
1/6/2014	2401640	John DiGirolamo	MORTELLITI ANNE-MARIE	Customer Pay	\$954.85	\$954.85	
1/15/2014	2401686	Adrian Carelli	HUMPHREYS JACK	Customer Pay	\$1,388.60	\$1,388.60	
1/31/2014	2401737	Adrian Carelli	Aquilino Donato	Customer Pay	\$27.14	\$27.14	
2/6/2014	2401766	Adrian Carelli	OLIVEIRA Leo	Customer Pay	\$852.92	\$852.92	

(X) (Insurance Co = Customer Pay) ▼

Applying Totals

ReportPro allows you to add Column Total Options for review and print.

To add a column total for review or print, simply highlight the column you'd like to total, right click and it will launch the "Column Total Options" window.

The screenshot shows the ReportPro interface with the '0110-Sales Journal' report. A dialog box titled 'Column Total Options' is open, allowing the user to select a column to total. The 'Selected Column' is 'Sale Total'. The dialog offers three options for the column total: 'Count', 'Sum' (selected), and 'Average'. It also offers two options for the format: 'Currency' (selected) and 'Hours'. There is a checkbox for 'Clear Selected Column Total'. The background report shows a table with columns: Closed, RO #, Insurance Company, Customer, Sale Total, Total Billed, and Paid. The 'Sale Total' column is highlighted in blue.

Closed	RO #	Insurance Company	Customer	Sale Total	Total Billed	Paid
2/13/2015	47849	AAA	Bahr Craig	\$1,023.30	\$1,023.30	\$1,023.30
1/28/2015	47784	AAA	McGriff Kristen	\$1,088.81	\$1,088.81	\$1,088.81
1/16/2015	47699	AAA	Drumm Jean	\$2,062.55	\$2,062.55	\$2,062.55
1/31/2015	47715	AAA	Horan Joan	\$4,991.09	\$4,991.09	\$4,991.09
2/9/2015	47812	AAA	Salas Marc	\$3,990.93	\$3,990.93	\$3,990.93
2/27/2015	47853	AAA	Levine Nicholas	\$6,156.51	\$6,156.51	\$6,156.52
3/16/2015	48106	AAA	Malomo Anthony J.	\$5,263.61	\$5,263.61	\$5,263.60
1/22/2015	47820	AAA	Mendez Mike	\$4,473.44	\$4,473.44	\$4,473.44
1/20/2015	47850	AAA	Chi Diego	\$1,063.00	\$1,063.00	\$1,108.00
2/6/2015	478			\$1,664.95	\$1,664.95	\$1,664.95
1/22/2015	478			\$604.67	\$604.67	\$604.67
2/27/2015	479			\$2,854.50	\$2,854.50	\$2,967.42
2/4/2015	479			\$1,200.00	\$1,200.00	\$1,200.00
2/23/2015	480			\$911.73	\$911.73	\$911.73
4/6/2015	481			\$3,872.51	\$3,872.51	\$2,567.41
3/25/2015	481			\$509.02	\$509.02	\$509.02
4/20/2015	483			\$1,919.41	\$1,919.41	\$1,919.41
4/30/2015	474			\$35,279.74	\$35,279.74	\$35,279.74
1/31/2015	475			\$24,658.94	\$24,658.94	\$24,665.84
1/23/2015	476			\$14,440.98	\$14,440.98	\$14,440.98
2/13/2015	478			\$10,113.44	\$10,113.44	\$10,346.99
3/31/2015	478			\$30,872.49	\$30,872.49	\$30,872.49
2/13/2015	479			\$3,684.35	\$3,684.35	\$3,684.35
3/11/2015	480			\$1,336.41	\$1,336.41	\$1,336.41
2/25/2015	480			\$1,172.31	\$1,172.31	\$1,172.31
4/14/2015	481			\$5,302.79	\$5,302.79	\$5,302.79

This allows you to choose Count, Sum or Average and to format the numbers in Currency or Hours. The totals will show at the bottom of the screen.

The screenshot shows the ReportPro interface with the '0110-Sales Journal' report. The 'Column Total Options' dialog box is closed. The report table is visible, and the total for the 'Sale Total' column is displayed at the bottom of the table. The total is \$2,723,061.45.

4/14/2015	48165	Ace Insurance	Cook Troy & Susan	\$5,302.79	\$5,302.79	\$5,302.79
4/17/2015	48299	Ace Insurance	Coffey James	\$5,454.82	\$5,454.82	\$4,550.57
4/28/2015	20053	Ace Insurance	Donahue Jim	\$475.76	\$475.76	\$475.76
4/27/2015	48400	Acuity Ins	VanValkenburg Ann	\$2,571.81	\$2,571.81	\$2,571.81
				\$2,723,061.45		

NOTE: If your screen is sorted or filtered, the totals may show below the viewable area. To view them, simply scroll down to the bottom of the page and you will see the totals.

Column Totals with Different Options Applied

You can also sort one column by Totals and a different column by Average, etc.

ReportPro - Advanced Reporting

ReportPro

C | Location +/-
Local Host A
E
R
C

X (Location = Local Host)

0100-Sales
0110-Sales Journal
0120-Sales Journal Summary
0130-Labor Sales Journal
0140-RO Sales Journal
0150-Sales Tax Report
0160-Total Loss Analysis

Date Selection
Start Date: 1/1/2015
End Date: 7/22/2015
Delivery instead of Closed Date
Show WIP Departments Only

Export Options
Export

Pre-Processing **Start**

0110-Sales Journal + - Portrait Landscape Print Save

Drag a column header here to group by that column

Closed	RO #	Insurance Company	Customer	Sale Total	Total Billed	Paid	Balance
2/13/2015	47849	AAA	Bahr Craig	\$1,023.30	\$1,023.30	\$1,023.30	
1/28/2015	47784	AAA	McGriff Kristen	\$1,088.81	\$1,088.81	\$1,088.81	
1/16/2015	47699	AAA	Drumm Jean	\$2,062.55	\$2,062.55	\$2,062.55	
1/31/2015	47715	AAA	Horan Joan	\$4,991.09	\$4,991.09	\$4,991.09	
2/9/2015	47812	AAA	Salas Marc	\$3,990.93	\$3,990.93	\$3,990.93	
2/27/2015	47853	AAA	Levine Nicholas	\$6,156.51	\$6,156.51	\$6,156.52	
3/16/2015	48106	AAA	Malomo Anthony J.	\$5,263.61	\$5,263.61	\$5,263.60	
1/22/2015	47820	AAA	Mendez Mike	\$4,473.44	\$4,473.44	\$4,473.44	
1/20/2015	47850	AAA	Chi Diego	\$1,063.00	\$1,063.00	\$1,108.00	
2/6/2015	47856	AAA	Highbarger Greg	\$1,664.95	\$1,664.95	\$1,664.95	
1/22/2015	47896	AAA	Snyder Jim	\$604.67	\$604.67	\$604.67	
2/27/2015	47923	AAA	Garcia Varonica	\$2,854.50	\$2,854.50	\$2,967.42	
2/4/2015	47966	AAA	Cooper Paul	\$1,200.00	\$1,200.00	\$1,200.00	
2/23/2015	48036	AAA	Ruppert Joshua	\$911.73	\$911.73	\$911.73	
4/6/2015	48186	AAA	Farnsworth Vanessa	\$3,872.51	\$3,872.51	\$2,567.41	
3/25/2015	48188	AAA	Peters Jennifer	\$509.02	\$509.02	\$509.02	
4/20/2015	48305	AAA	Ehioba George	\$1,919.41	\$1,919.41	\$1,919.41	
4/30/2015	47465	Ace Insurance	Montague Don	\$35,279.74	\$35,279.74	\$35,279.74	
1/31/2015	47538	Ace Insurance	ARISTOCRAT MOTORS	\$24,658.94	\$24,658.94	\$24,665.84	
1/23/2015	47666	Ace Insurance	Spurgeon Melinda	\$14,440.98	\$14,440.98	\$14,440.98	
2/13/2015	47823	Ace Insurance	Jones Caroline	\$10,113.44	\$10,113.44	\$10,346.99	
3/31/2015	47859	Ace Insurance	Donahue Jim	\$30,872.49	\$30,872.49	\$30,872.49	
2/13/2015	47924	Ace Insurance	Farrish Bert	\$3,684.35	\$3,684.35	\$3,684.35	
3/11/2015	48030	Ace Insurance	New Jay	\$1,336.41	\$1,336.41	\$1,336.41	
2/25/2015	48079	Ace Insurance	Sight Jim	\$1,172.31	\$1,172.31	\$1,172.31	
4/14/2015	48165	Ace Insurance	Cook Troy & Susan	\$5,302.79	\$5,302.79	\$5,302.79	
				\$2,723,061.45	\$3,518.17		

To clear the totals, simply right click on the column, and choose "Clear Selected Column Totals"

Column Total Options

Selected Column:
Sale Total

Column Totals

Count Sum Average

Format

Currency Hours

Clear Selected Column Total

OK Cancel

Saving Your Changes

You can "lock in" customized reports by clicking "Save" in the top right of the screen ** NOTE: Your report will now "default" to the "Saved" choice you made every time you run the report.

Printing

When you print, ReportPro will display on the Print Preview exactly what you see on the screen. Should the columns be too wide for the printed page, the extra columns will fall to page 2.

Report Pro now allows you to choose to print your report in Portrait or Landscape by clicking on your choice.

The screenshot displays the ReportPro interface. On the left, a sidebar shows a tree view of reports, with '0140-RO Sales Journal' selected. Below this are date selection and export options. The main window shows the '0140-RO Sales Journal' report, which is a table with columns for RO Date, RO #, Customer, Total Billed, Paid, and Balance Location. The report is organized by insurance company and estimator. A 'Print Preview' window is overlaid on top, showing the same report content. The print preview window includes a menu bar (File, Explorer, Edit, View), a toolbar, and margin settings (Left: 0.5", Top: 0.5", Right: 0.5", Bottom: 0.5", Header: 0.5"). The status bar at the bottom of the print preview window indicates 'Page: 1 of 6 Pages, Paper Size: 8.5" x 11"', and the main window status bar shows 'Status: Ready'.

In addition the "Print Preview" window allows for additional customization – including a "Fit To Page" option.

Additional Tips

Expanding the "View"

To ONLY see the report and exclude the "setup" simply click on the report name, i.e.: **0140-RO Sales Journal** and the report view will expand. To return the screen to default simply click on the report name again.

ReportPro - Advanced Reporting

ReportPro

0140-RO Sales Journal **Click HERE to Expand**

Drag a column header here to group by that column

RO Date	RO #	Customer	Estimator	Total Billed	Paid	Insurance Co	Balance
5/7/2013	40250	WELLS WAYNE	MONTEITH, MARTIN	\$279.62	\$279.62	CUSTOMER PAY	
5/7/2013	40251	JACKSON'S TOYOTA	GRIFFIN, ADELE	\$564.32	\$564.32	JACKSONS TOYOT	
5/7/2013	40256	DEBRUYN STACY	SHERMAN, GREG	\$500.00	\$500.00	THIRD PARTY PAY	
5/7/2013	40254	MERCER DIANE & PAUL	MONTEITH, MARTIN	\$113.00	\$113.00	STATE FARM INSU	
5/7/2013	40253	DRURY NEIL	MONTEITH, MARTIN	\$66.67	\$66.67	CUSTOMER PAY	
5/7/2013	40255	PAUL SADLON MOTORS	GRIFFIN, ADELE	\$346.07	\$346.07	PAUL SADLON MO	
5/7/2013	40257	SCRATCH RICHARD	HELE, CHRISTINA	\$2,141.28	\$2,141.28	ECONOMICAL MUT	
5/7/2013	40258	CORBETT MIKE	SHERMAN, GREG	\$395.50		CUSTOMER PAY	
5/7/2013	40260	IMPACT AUTO AUCTION	SHERMAN, GREG	\$1,009.94	\$1,009.94	JEVCO INSURANCE	
5/7/2013	40259	JAMES COLIN	MONTEITH, MARTIN	\$157.07	\$157.07	CUSTOMER PAY	
5/7/2013	40262	WHITTAKER DAVE	MONTEITH, DIANE	\$5,210.69	\$5,210.69	AVIVA CANADA IN	
5/7/2013	37076.9	TRAMER PAUL	HELE, CHRISTINA			Zenetec Internal	
5/7/2013	40263	MILLER JOSEPH	HELE, CHRISTINA	\$1,310.51	\$1,310.51	TD INSURANCE	
5/8/2013	40285	GARRETT SAMANTHA	MONTEITH, DIANE	\$1,291.36	\$1,291.36	THIRD PARTY PAY	
5/8/2013	40264	STURTRIDGE SHIELA	MONTEITH, MARTIN	\$236.17	\$236.17	CUSTOMER PAY	
5/8/2013	40265	STURTRIDGE SHIELA	MONTEITH, MARTIN	\$236.17	\$236.17	CUSTOMER PAY	
5/8/2013	40267	COUTTS WALLY	SHERMAN, GREG	\$6,805.15	\$6,805.15	CUSTOMER PAY	
5/8/2013	-40266	HELE CHRISTINA	SHERMAN, GREG			CUSTOMER PAY	
5/8/2013	40268	NADON VICTOR	MONTEITH, MARTIN	\$347.34	\$347.34	CUSTOMER PAY	
5/8/2013	40273	KING BARRIE	HELE, CHRISTINA	\$203.40	\$203.40	CUSTOMER PAY	
5/8/2013	40154.9	WOOLLETT JOHN	MONTEITH, MARTIN			CUSTOMER PAY	

ReportPro - Advanced Reporting

ReportPro

0140-RO Sales Journal **Click HERE to Collapse**

Drag a column header here to group by that column

RO Date	RO #	Customer	Estimator	Total Billed	Paid	Insurance Co	Balance	Location
5/7/2013	40250	WELLS WAYNE	MONTEITH, MARTIN	\$279.62	\$279.62	CUSTOMER PAY		SummitCRS 2
5/7/2013	40251	JACKSON'S TOYOTA	GRIFFIN, ADELE	\$564.32	\$564.32	JACKSONS TOYOT		SummitCRS 2
5/7/2013	40256	DEBRUYN STACY	SHERMAN, GREG	\$500.00	\$500.00	THIRD PARTY PAY		SummitCRS 2
5/7/2013	40254	MERCER DIANE & PAUL	MONTEITH, MARTIN	\$113.00	\$113.00	STATE FARM INSU		SummitCRS 2
5/7/2013	40253	DRURY NEIL	MONTEITH, MARTIN	\$66.67	\$66.67	CUSTOMER PAY		SummitCRS 2
5/7/2013	40255	PAUL SADLON MOTORS	GRIFFIN, ADELE	\$346.07	\$346.07	PAUL SADLON MO		SummitCRS 2
5/7/2013	40257	SCRATCH RICHARD	HELE, CHRISTINA	\$2,141.28	\$2,141.28	ECONOMICAL MUT		SummitCRS 2
5/7/2013	40258	CORBETT MIKE	SHERMAN, GREG	\$395.50		CUSTOMER PAY		SummitCRS 2
5/7/2013	40260	IMPACT AUTO AUCTION	SHERMAN, GREG	\$1,009.94	\$1,009.94	JEVCO INSURANCE		SummitCRS 2
5/7/2013	40259	JAMES COLIN	MONTEITH, MARTIN	\$157.07	\$157.07	CUSTOMER PAY		SummitCRS 2
5/7/2013	40262	WHITTAKER DAVE	MONTEITH, DIANE	\$5,210.69	\$5,210.69	AVIVA CANADA IN		SummitCRS 2
5/7/2013	37076.9	TRAMER PAUL	HELE, CHRISTINA			Zenetec Internal		SummitCRS 2
5/7/2013	40263	MILLER JOSEPH	HELE, CHRISTINA	\$1,310.51	\$1,310.51	TD INSURANCE		SummitCRS 2
5/8/2013	40285	GARRETT SAMANTHA	MONTEITH, DIANE	\$1,291.36	\$1,291.36	THIRD PARTY PAY		SummitCRS 2
5/8/2013	40264	STURTRIDGE SHIELA	MONTEITH, MARTIN	\$236.17	\$236.17	CUSTOMER PAY		SummitCRS 2
5/8/2013	40265	STURTRIDGE SHIELA	MONTEITH, MARTIN	\$236.17	\$236.17	CUSTOMER PAY		SummitCRS 2
5/8/2013	40267	COUTTS WALLY	SHERMAN, GREG	\$6,805.15	\$6,805.15	CUSTOMER PAY		SummitCRS 2
5/8/2013	-40266	HELE CHRISTINA	SHERMAN, GREG			CUSTOMER PAY		SummitCRS 2
5/8/2013	40268	NADON VICTOR	MONTEITH, MARTIN	\$347.34	\$347.34	CUSTOMER PAY		SummitCRS 2
5/8/2013	40273	KING BARRIE	HELE, CHRISTINA	\$203.40	\$203.40	CUSTOMER PAY		SummitCRS 2
5/8/2013	40154.9	WOOLLETT JOHN	MONTEITH, MARTIN			CUSTOMER PAY		SummitCRS 2
5/8/2013	40270	PIRK VIVIAN	MONTEITH, MARTIN	\$11.30	\$11.30	CUSTOMER PAY		SummitCRS 2
5/8/2013	40271	LENKAITIS PETER	MONTEITH, MARTIN	\$224.87	\$224.87	CUSTOMER PAY		SummitCRS 2
5/8/2013	40272	FERGUSON TIM	HELE, CHRISTINA			STATE FARM INSU		SummitCRS 2
5/8/2013	40274	IMPACT AUCTO AUCTION	SHERMAN, GREG	\$672.92	\$672.92	INTACT INSURANC		SummitCRS 2
5/8/2013	40284	TABLER GRANT	HELE, CHRISTINA	\$1,220.97	\$1,220.97	CUSTOMER PAY		SummitCRS 2
5/8/2013	40275	ACURA OF BARRIE	SHERMAN, GREG	\$157.07	\$157.07	ACURA OF BARRIE		SummitCRS 2

MSO Features

Roll-Up Reporting for multiple shops.

Add all your shops to run reports. OR, you can filter in/out shops by clicking on the drop-down arrow in the "C Location" row and checking the ones you choose.

Finally, if you have so many locations that you cannot see all of them in the setup screen, you can simply click the + / to the right of the "C Location" row to Expand/Collapse the Location List

The screenshot displays the ReportPro interface. The top window shows the 'ReportPro - Advanced Reporting' window with a 'C Location' list. A dropdown menu is open, showing a selection of locations: (All), (Custom...), Local Host, SummitCRS 2, SummitCRS 3, SummitCRS 4, and SummitCRS 5. Below this, the '0110-Sales Journal' is selected.

The bottom window shows the '0310-Cycle Time Analysis' report. The left sidebar lists various report options under '0300-Production', with '0310-Cycle Time Analysis' selected. The main area displays a table with columns: RO #, Hat/Unit #, Estimator, Customer, Claim #, Vehicle, Start, End, Days, Hrs, and Hrs/Day. The report is filtered for 'Location : 001-Boise (Avg Cycle 5.2)' and 'Job Class : Heavy Over 31 Hours (Avg Cycle 21.0)'. The table contains 25 rows of data, including details for various vehicles and estimators.

RO #	Hat/Unit #	Estimator	Customer	Claim #	Vehicle	Start	End	Days	Hrs	Hrs/Day
40775		CLARE, DOUG	ROTHON DIANE	14339385	2011 Mercedes	5/15/2012	8/9/2012	86	66.1	0.
40219		CLARE, DOUG	WRIGHT LESLIE C	V629234-6 A 1	2004 Nissan Tita	1/4/2012	1/24/2012	21	30.3	1.
40919		CLARE, DOUG	DUPONT SHELDO	14446613	2007 Ford Frees	6/13/2012	7/4/2012	22	44.0	2.
42101		CLARE, DOUG	HUGHES JOHN F	V870069-6 A 0	2006 Toyota Tu	2/25/2013	3/19/2013	23	54.6	2.
40488		CLARE, DOUG	FOX CATHERINE L	V659424-2 A 1	2010 Ford Escap	3/14/2012	4/13/2012	31	82.1	2.
40038		CLARE, DOUG	TAMASI CHRIS TC	V599853-4 A 1	2007 Honda Clw	11/18/2011	11/29/2011	12	36.2	3.
40089		Cuff, John	PHELAN JAMES T	X061709-1 A 0	2005 Dodge Car	12/1/2011	12/9/2011	9	35.3	3.
36376		Doug K. Clare	CROUTHAMEL SO	5620967	2001 Dodge Ram	10/14/2011	11/23/2011	46	55.2	1.
41403		Doug K. Clare	MOORE KIRSTEE H	V742621-4 A 0	2005 Honda Od	9/27/2012	10/13/2012	22	37.5	1.
40397		Doug K. Clare	kay devon	5047148	2009 Ford F-15C	2/21/2012	2/28/2012	8	39.4	4.
40758		Justin Cox	SUBURBAN MOTC		2008 Ford F-35C	5/17/2012	6/9/2012	23	28.0	1.
41645		Justin Cox	LAW DARREN J	P743313-3 A 0	2010 Dodge Ram	11/22/2012	12/19/2012	28	37.0	1.
41188		Justin Cox	UNDERHILL CHAR	P640190-4 A 0	2005 Subaru Imp	8/21/2012	9/13/2012	24	32.1	1.
36237		Justin Cox	KAZANOWSKI DI	13181534	2007 Ford Focus	10/11/2011	11/9/2011	30	48.1	1.
41500		Justin Cox	Mccolm Stephen	15057919	2006 Dodge Ram	10/18/2012	11/16/2012	30	51.4	1.
40839		Justin Cox	LUCAS SEAN A	P572433-0 A 1	2004 Nissan Max	5/31/2012	6/20/2012	21	37.7	1.
40929		Justin Cox	HOENEN MARK		1999 Ford F-35C	6/19/2012	7/24/2012	36	64.8	1.
42191		Justin Cox	MCGANN WILLIAM	0277403119	2005 SCION XB	3/15/2013	3/15/2013	1	2.0	2.
42082		Justin Cox	Nielsen Patricia	15635057	2007 Toyota Ma	2/21/2013	3/15/2013	23	47.1	2.
36266	10285135	Justin Cox	BARNES THOMAS	238526	2011 Dodge Ram	12/5/2011	12/30/2011	26	61.6	2.
41339		Justin Cox	Schwab Amy	14936838	2010 HYUNDAI	9/14/2012	9/23/2012	15	37.0	2.
41720		Justin Cox	GWYNN WILLIAM	P800439-2 A 0	2005 Honda Acc	11/28/2012	12/21/2012	24	65.4	2.
40677		Justin Cox	COPELAND EDWA	V692924-3 A 0	2010 Ford F-15C	4/26/2012	5/7/2012	12	33.3	2.
40576		Justin Cox	IBBOTSON CHARL	V681277-4 A 0	2000 Ford F-35C	4/5/2012	4/20/2012	16	45.7	2.
40163		Justin Cox	EGGER LORI		2007 Acura RDX	12/16/2011	12/29/2011	14	41.6	3.
40642		Justin Cox	ROSE DANIEL J	V690372-6 A 0	2001 GMC Sierra	4/23/2012	5/7/2012	15	44.9	3.
40043	01596487	Justin Cox	BUTLER ELIZABE	V592625-0 A 0	2008 Toyota Co	11/21/2011	12/6/2011	16	48.3	3.
41449		Justin Cox	MORRIS GUSTAV	V783534-5 A 0	2011 Dodge Ram	10/9/2012	10/24/2012	16	53.8	3.
40067		Justin Cox	HAMSTER DIANA	13502896	2005 Buick Ren	11/24/2011	12/2/2011	9	32.0	3.

