

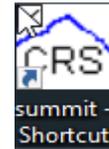
Summit Basic

TRAINING AND REFERENCE MANUAL

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Getting Started



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



Understanding the RO List View

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

| | | | |
|---|--|---|---|
| <i>Customer, Vehicle, and other RO related information is always at the top of your screen.</i> | <i>Body, Paint, and Current Tech, on existing Repair Order</i> | <i>Scheduled IN, OUT, and (OP) Original Promise Dates</i> | <i>Vehicle Status, Production "Warning Flag, and Parts Status</i> |
|---|--|---|---|

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

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

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!

CSR / Estimator Daily Responsibilities

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

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

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

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

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

Customer Vehicle Deliveries

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

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

Job Closing

Summary

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

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

Upon the arrival of the customer:

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

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

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

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

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

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

Customer Payments

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

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

1. Click on the *NEW ICON*

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

The screenshot shows the 'A/R History for RO#: 19128 (NEWMAN YOLANDA)' window. The 'History/Deposits' tab is active, showing a table with columns: RO #, Sched Out, Name, Estimator, Date, Amount, Method, Reference #, Paid By, Rec'd By, and Notes. A red circle highlights the 'New' button in the top right of this window. In the main window's left sidebar, a red circle highlights the 'A/R-142' label.

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

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

- Payment Date: 5/24/2016 (dropdown)
- Amount: [Empty text box]
- Apply Payment to: [Empty dropdown]
- Pay Method: [Empty dropdown]
- Reference #: [Empty text box]
- Paid By: Customer (dropdown)
- Name of Payee: Sanda Kelly (text box)
- Notes: [Empty text box]
- Current Balance: \$272.21
- Deductible: \$0.00
- Buttons: Save, Cancel, Scan Payment

Writing an Estimate and Importing into Summit

Write an Estimate

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

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

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

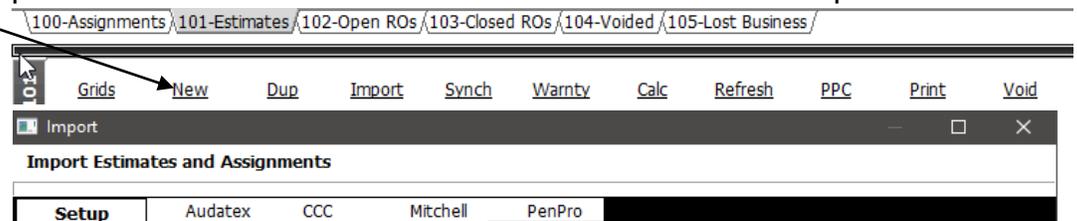
2. Create the export file in the estimating system. In ADP Select File Export, In Mitchell select save and the estimate will automatically export to the EMS folder. CCC has several different EMS export settings.

Import the Estimate to Summit

1. Log into Summit. (System Module)

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

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



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

5. Choose the estimate from the list by highlighting it

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

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

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

The screenshot shows two windows. The top window, titled 'Import', has tabs for 'SetUp', 'Audatex', 'CCC', 'Mitchell', and 'PenPro'. It contains a table of vehicle information:

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

The bottom window, titled 'Import Preview', shows a table of line items:

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

Totaling the Estimate

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

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

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

The screenshot shows the software interface with the following details:

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

The 'Line Items' tab is active, showing a table of items:

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

Overall Ttl: \$2,810.83

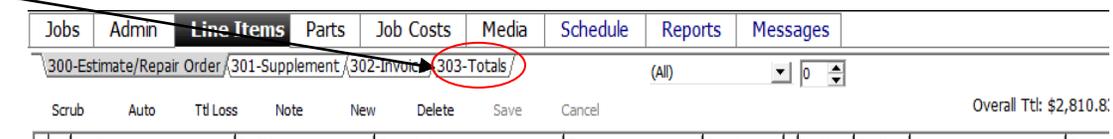
| # | LbrOp | LbrTyp | Description | Type | Retail | T | LbrHrs | PntHrs |
|----|------------------|----------|---------------------------|------|---------|-------------------------------------|--------|--------|
| 1 | Repair | Body | Door Shell,Rear LT | | | <input type="checkbox"/> | 1.0 | |
| 2 |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

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

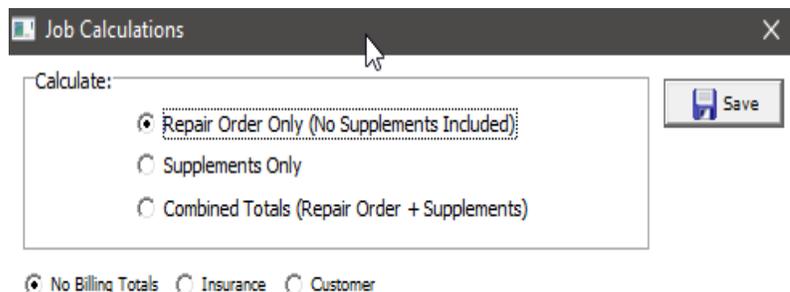
When importing estimate data from ADP or CCC please beware of the following changes that **MUST BE** made in the Summit RO Line Items, TYPE column:

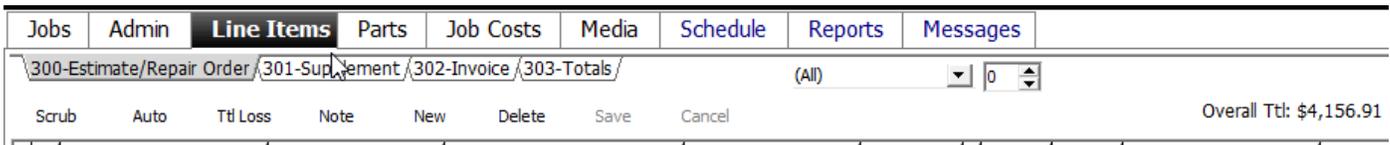
- Flex Additive: Remove R&R and Change to Paint Materials
- Corrosion Protection: Change to Shop Supplies
- Collision Repair Materials: Change to Shop Supplies
- Hazardous Waste: Change to Hazardous Waste
- Tire Tax: Change to NJ or PA Tire Tax
- Cover Car: Change to Paint Supplies
- Anti-Freeze: Change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

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



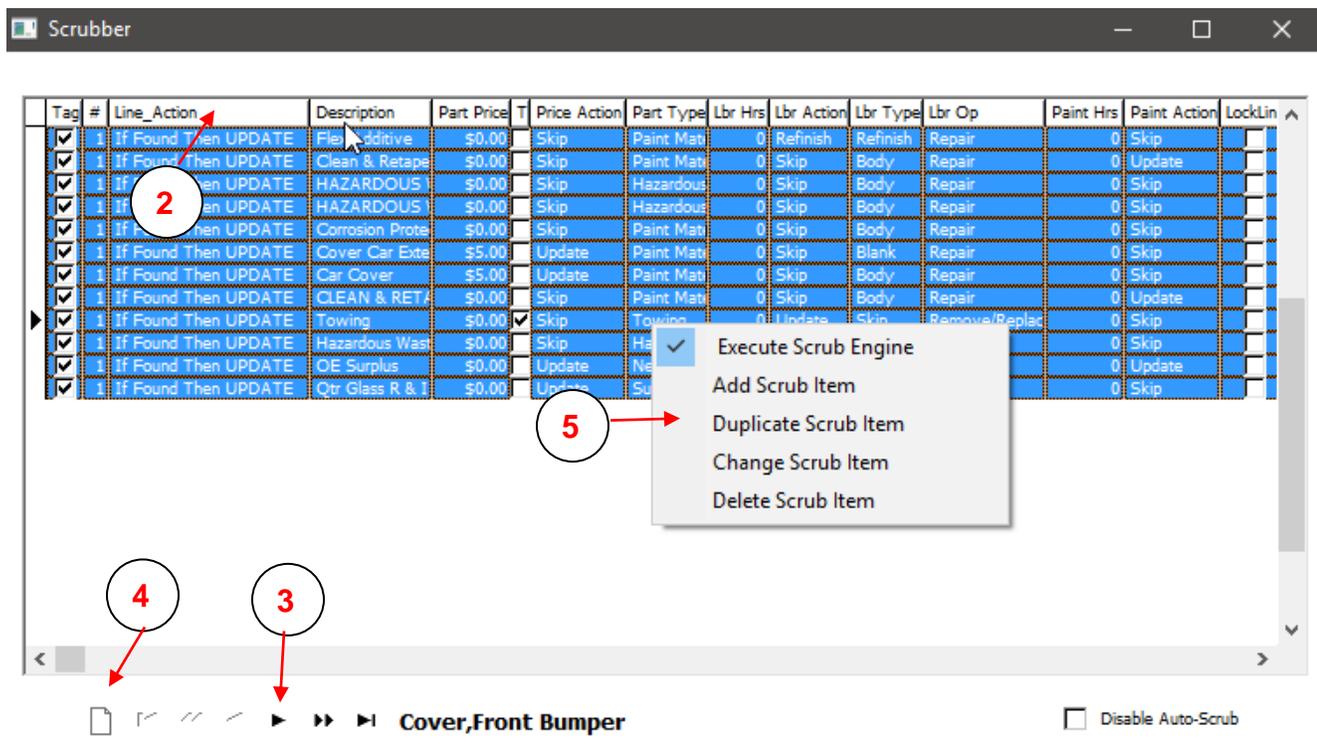
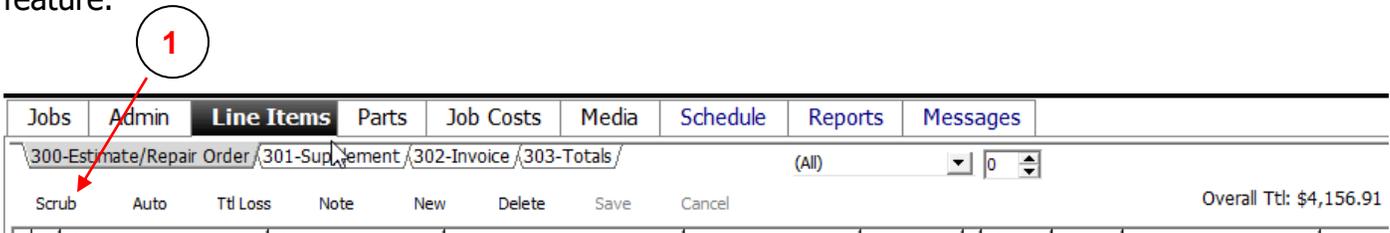
4. Select Estimate Only option from the options that appear, and click Save. Verify the totals.





Scrubbing the Estimate

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

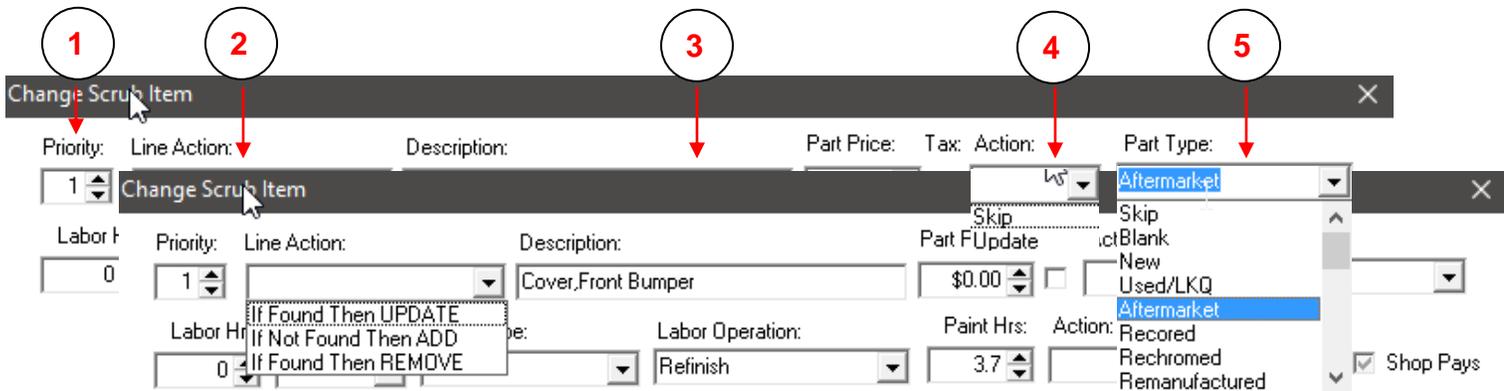


Once in the Scrubber, you will see your list of Scrub Items (2).

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

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

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



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



imported from the estimating system, leaving the field empty.

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

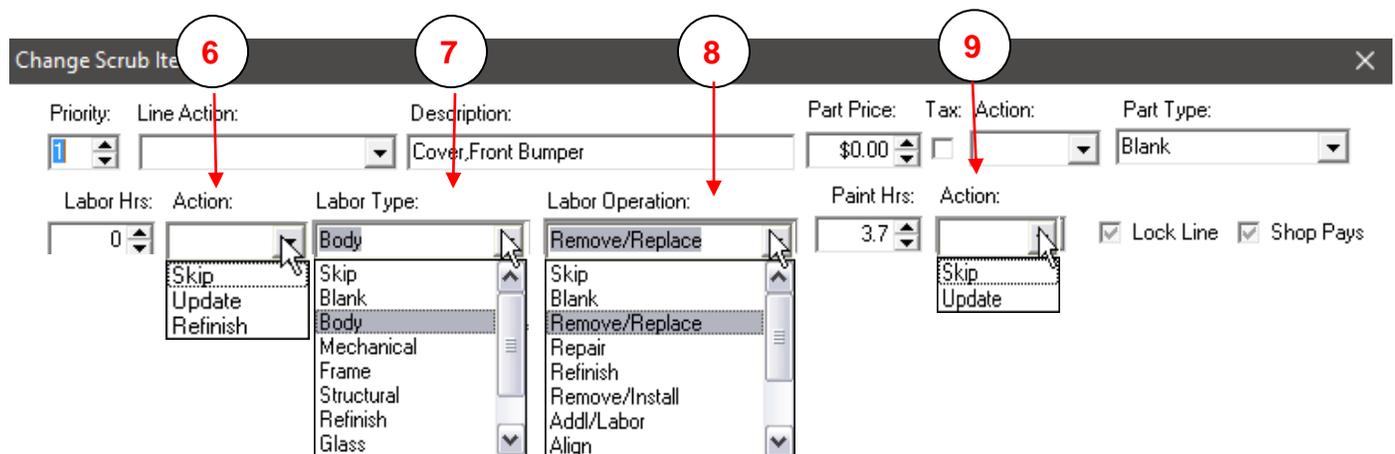
The Priority number (1) shows the order the Scrub Items are executed in.

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

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

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

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



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

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

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

Creating a Repair Order with an Estimate

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

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



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



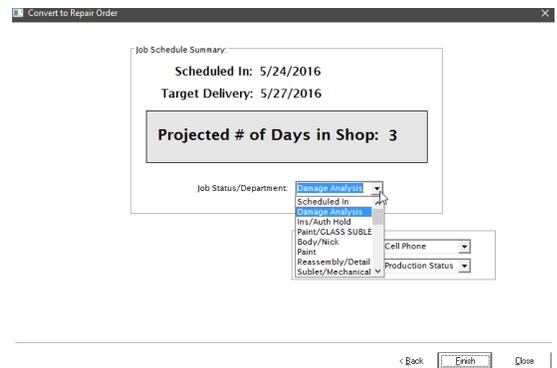
3. Once you "drag" it up, the Summit "RO Wizard" appears. The following screens will appear. Please fill in all fields with a **RED *** select Next when you have completed the appropriate fields.

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

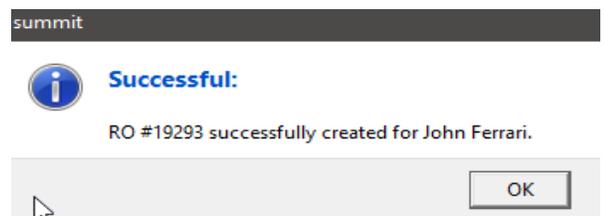
vehicle. This helps in the scheduling process.

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

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



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

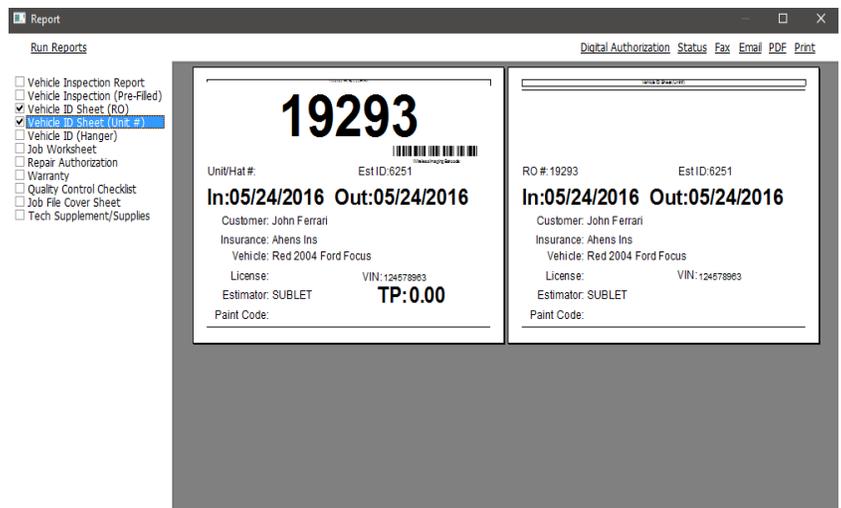


Print the RO Document Pack

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

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

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



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

Without an Estimate (Towed Vehicles)

Moving an Estimate to the Open RO List

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



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

Create New Assignment

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

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

< Back Finish Cancel

Create New Estimate

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

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

< Back Finish Cancel

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

Estimate #: 6253 Customer ID: Billing Code:

Name/Company: John Ferrari Home Phone:

Contact: Work Phone:

Address 1: Cellular Phone:

Address 2: Fax/Pager:

City: St/Prov Postal Code:

E-Mail Address: Communications: None

SMS:

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

The screenshot shows the 'Jobs' tab selected in the navigation bar. The main area displays details for Estimate # 6253 for John Ferrari, a 2004 Ford Focus. The status is 'Not Assigned'. Below this is a 'PARTS' bar with 10 colored buttons (0 0 0 0 0 0 0 0 0 0). The bottom section shows a table of estimates.

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

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

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

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

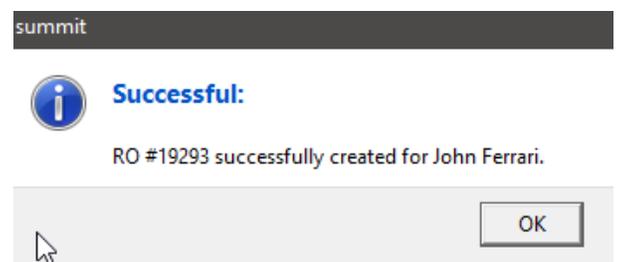
NOTE: Summit can automatically “classify” your repairs if you have set up your Repair Classification profile in the Summit System Administration module.

On tow-ins select *Bypass Scheduling*.

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

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

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



Printing the RO Document Pack

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

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

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

Jobs Admin Line Items Parts Job Costs Media Schedule Reports Messages

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

Locate Late IOU Returns Refresh Print (All Parts Statuses)

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

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

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

Report

Run Reports Digital Authorization Status Fax Email PDF Print

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

19293

Unit/Hat #: Est ID: 6251

In: 05/24/2016 Out: 05/24/2016

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

RO #: 19293 Est ID: 6251

In: 05/24/2016 Out: 05/24/2016

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

Parts Management

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

The Summit Parts View

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

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

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

Locating Parts

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

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

Late Parts

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

16 late parts as of 5/25/2016 [Print](#)

Drag a column header here to group by that column

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

IOU's

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



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

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



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

Report

Run Reports Digital Authorization

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

Fridley Auto Body

Open RO Parts Summary

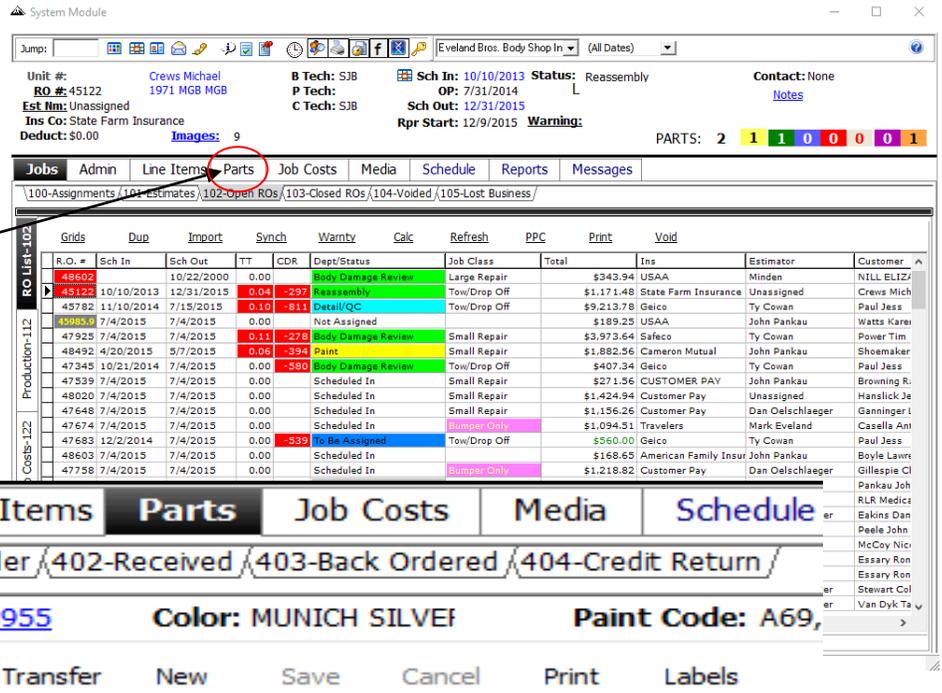
| Sched Out | RO # | Customer | Insurance | Vehicle | Parts | Ord | Rec | BO | Ret | OCR | SUB | Late |
|------------|-------|-----------------|-----------------------|--|-------|-----|-----|----|-----|-----|-----|------|
| 09/14/2015 | 19184 | Sanda Kelly | U.S.A.A. | 2003 EBONY Lincoln Town Car | 4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

Summary

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

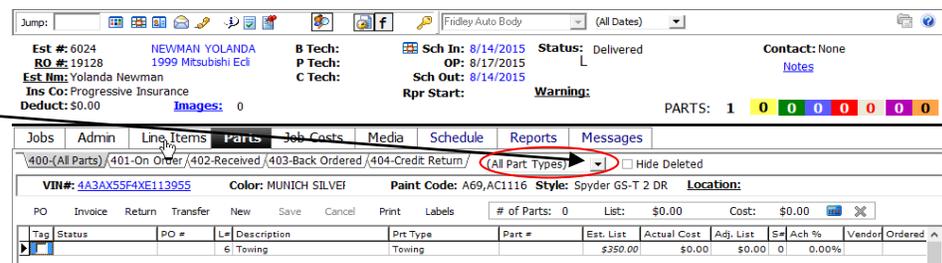
Ordering Parts

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

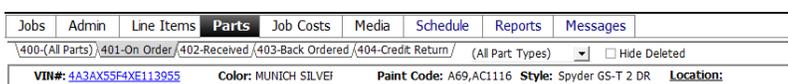


The RO Parts Menu provides the user with the following options: *Order Parts, Receive Parts, Backorder, Select and Print Purchase Orders, Enter Invoices, Return Parts, Transfer Parts Costs, Enter New Parts on RO's, Print Parts Reports and Labels.*

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



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



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

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

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

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

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

Receiving Parts

1. Click on the *On Order* tab

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

| Jobs | Admin | Line Items | Parts | Job Costs | | |
|--|---------|------------|----------|-----------------|-------------|---------|
| 400-(All Parts) / 401-On Order / 402-Received / 403-Back Ordered | | | | | | |
| VIN#: STDZA23C55S368716 | | Color: RED | | | | |
| PO | Invoice | Return | Transfer | New Save Cancel | | |
| Adj. List | S# | Ach % | Vendor | Ordered | Target Cost | Due |
| \$0.00 | 0 | 0.00% | | 12/31/1969 | \$0.00 | 12/31/1 |
| \$0.00 | 0 | 0.00% | | | \$0.00 | |

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

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

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

Back Ordered and Credit Returned Parts

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

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

Print the Parts Labels

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

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

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

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

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

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

NOTE: Summit recommends SEIKO printers for parts labels

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

Print the Parts Status and

Parts List Reports

1. Click the *All Parts* tab.

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

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

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

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

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

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

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

Report

Run Reports Photo Manager Digital Authorization Status Fax Email PDF Print

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

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

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

Parts Status Report

| Customer Information | | Vehicle Information | | Insurance Information | |
|--------------------------|--|---------------------------------|--|-------------------------|--|
| Name: YOUNGSHAW/ANGELA | | Vehicle: 2005 RED Toyota Sienna | | Ins Co: State Farm Ins. | |
| Address: 2702 21ST ST NW | | State: LE 4 DR Passenger V8 | | Company: 0 | |
| NEB/BROOKTON MN 55112 | | License: 233 PCA | | Phone: 851-285-9260 | |
| Phone: 952-285-9438 | | VIN: STCZA23C555364716 | | #: 85-7830-13002 | |
| | | Message: 11/2/05 | | Default: \$50000 | |

| # | Description | Part # | Vendor | Invoice # | Inv Date | Status | Ordered | ETA | RD \$ | Unit | Cost | GP % |
|----|-------------------------|------------|-------------------|-----------|------------|--------|------------|------------|----------|----------|----------|--------|
| 28 | Paint Primer S&S | 814802001 | | | | D | | | \$101.91 | \$101.91 | \$0.00 | |
| 1 | Conv. Paint Sunscr | 81194 8010 | | | 12/31/1969 | D | 12/31/1969 | 12/31/1969 | \$340.32 | \$340.32 | \$0.00 | |
| 18 | Hinge, Hood Panel | LT | SAVIAZE PART | | 12/31/1969 | D | 12/31/1969 | 12/31/1969 | \$52.50 | \$52.50 | \$0.00 | |
| 12 | Panel, Hood | LT | SAVIAZE PART | | 12/31/1969 | D | 12/31/1969 | 12/31/1969 | \$250.00 | \$250.00 | \$0.00 | |
| 12 | Hoodline H&V, Passenger | RT | PMI RECYCLED QIAD | | 12/31/1969 | D | 12/31/1969 | 12/31/1969 | \$139.87 | \$139.87 | \$0.00 | |
| 24 | Radiator | | BOGHOFF PART | | | D | | | \$284.00 | \$284.00 | \$0.00 | |
| 18 | Hinge, Hood Panel | RT | SAVIAZE PART | | 12/31/1969 | D | 12/31/1969 | 12/31/1969 | \$52.50 | \$52.50 | \$0.00 | |
| 8 | Hoodline H&V, Passenger | LT | PMI RECYCLED QIAD | | 12/31/1969 | D | 12/31/1969 | 12/31/1969 | \$192.57 | \$192.57 | \$0.00 | |
| 42 | Condenser A/C | | BOGHOFF PART | KESTON | 11/07/2018 | R | 12/31/1969 | 12/31/1969 | \$180.00 | \$180.00 | \$80.27 | 45.00% |
| 99 | Radiator | | SAVIAZE PART | LIQ | 70391123 | S | | | \$182.00 | \$0.00 | \$182.00 | 23.00% |
| 28 | Break, Battery H&V | LT | ZIVBETDY | 127821 | 11/17/2018 | R | 12/31/1969 | 12/31/1969 | \$19.18 | \$19.18 | \$14.37 | 28% |
| 8 | Motor, Front Sunscr | | ZIVBETDY | 127820 | 11/18/2018 | R | 12/31/1969 | 12/31/1969 | \$88.88 | \$88.88 | \$71.87 | 28% |
| 4 | Motor, Front Sunscr | LT | ZIVBETDY | 127821 | 11/17/2018 | R | 12/31/1969 | 12/31/1969 | \$34.88 | \$34.88 | \$28.14 | 24.99% |
| 22 | Control Arm Panel Lwr | | ZIVBETDY | 127821 | 11/17/2018 | R | 12/31/1969 | 12/31/1969 | \$88.37 | \$88.37 | \$73.78 | 28% |
| 48 | Shc, Inner Panel | LT | ZIVBETDY | 127820 | 11/18/2018 | R | 12/31/1969 | 12/31/1969 | \$107.82 | \$107.82 | \$86.84 | 28% |
| 17 | Latch, Hood Panel | | ZIVBETDY | 127821 | 11/17/2018 | R | 12/31/1969 | 12/31/1969 | \$82.18 | \$82.18 | \$68.18 | 28.01% |
| 18 | Shc, Hood Latch | | ZIVBETDY | 127821 | 11/17/2018 | R | 12/31/1969 | 12/31/1969 | \$14.80 | \$14.80 | \$12.94 | 28% |
| 8 | Motor, Front Sunscr | RT | ZIVBETDY | 127821 | 11/17/2018 | R | 12/31/1969 | 12/31/1969 | \$34.88 | \$34.88 | \$28.14 | 24.99% |
| 20 | Control Arm Panel Lwr | RT | ZIVBETDY | 127821 | 11/17/2018 | R | 12/31/1969 | 12/31/1969 | \$88.71 | \$88.71 | \$80.35 | 28% |
| 22 | Control Arm Panel Lwr | LT | ZIVBETDY | 127820 | 11/18/2018 | R | 12/31/1969 | 12/31/1969 | \$88.71 | \$88.71 | \$80.35 | 28% |
| 8 | Shc, Inner Gr-Br | | ZIVBETDY | 127821 | 11/17/2018 | R | 12/31/1969 | 12/31/1969 | \$28.88 | \$28.88 | \$21.84 | 24.99% |

Page #1

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Production Management

Assign Technicians to Jobs

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

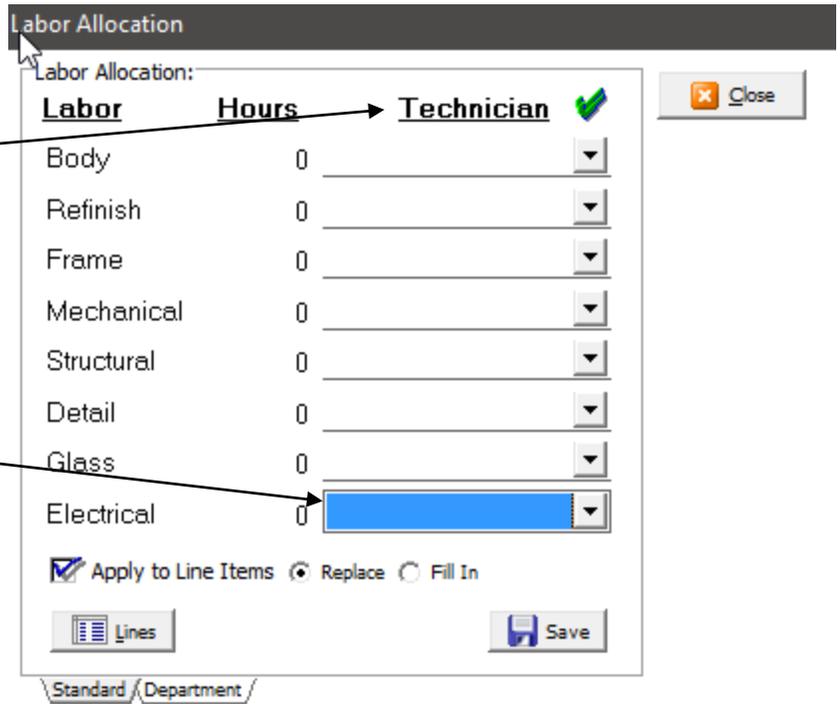
The screenshot shows a software window titled "System Module" with a toolbar and a data grid. The grid has columns for R.O. #, Sch In, Sch Out, TT, CDR, Dept/Status, Job Class, Total, Ins, Estimator, and Customer. A context menu is open over row 19260, with "Assign Labor" selected. The grid shows various ROs with different status colors (green, blue, red) and a total of 27 rows.

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

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

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

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



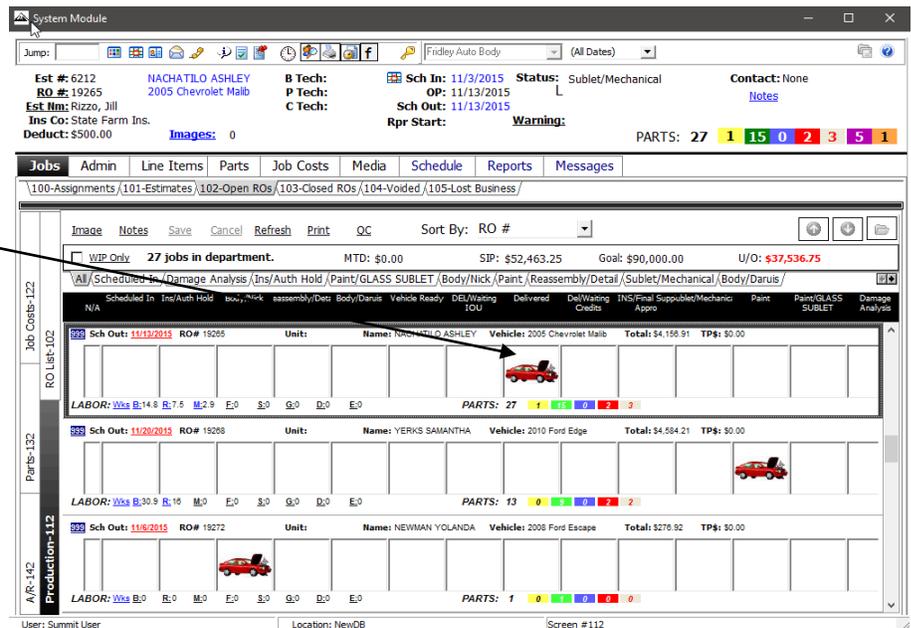
Move the Vehicle Through Production Stages

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

2. Select an RO.

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

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



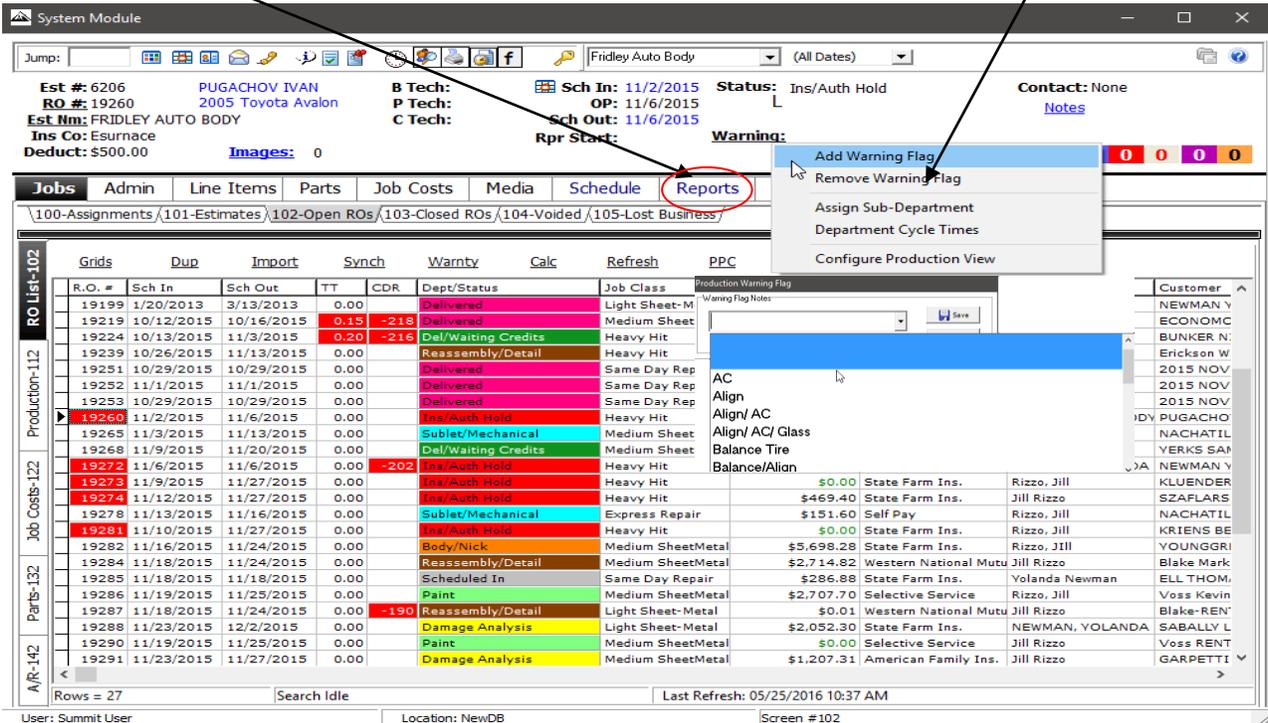
Warning Flags

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

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

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

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



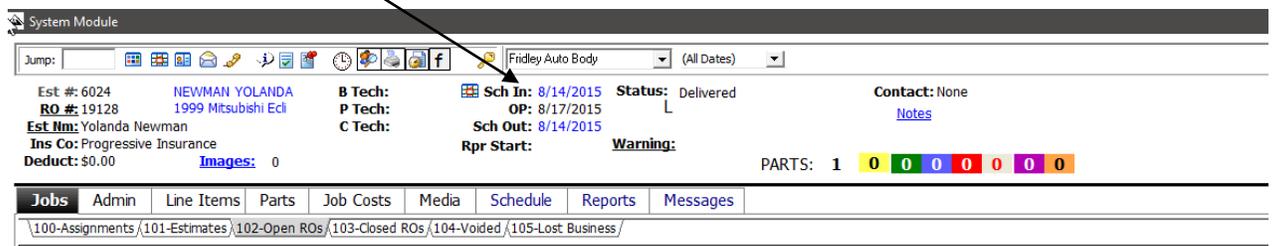
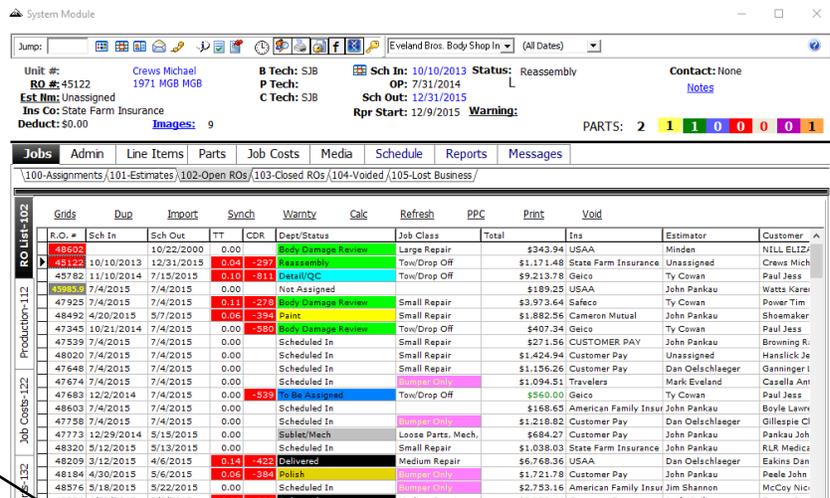
4. The *warning flag* will appear in **Red Letters** in the customer information at the top of the screen
 5. To remove a warning flag, right click on the vehicle icon and choose *Remove Warning Flag*. The warning flag will be removed.

Change Scheduled In Date

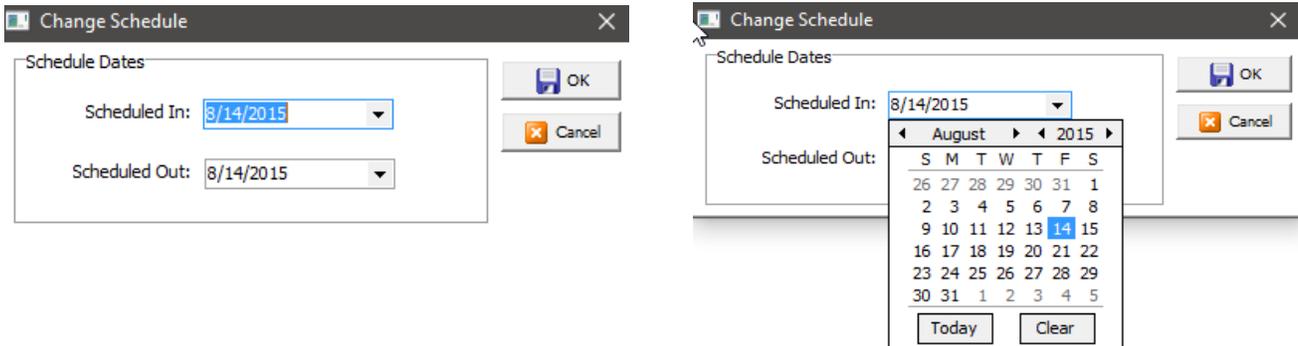
1. Click the *Open RO's* tab and go to the *RO List* view.

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

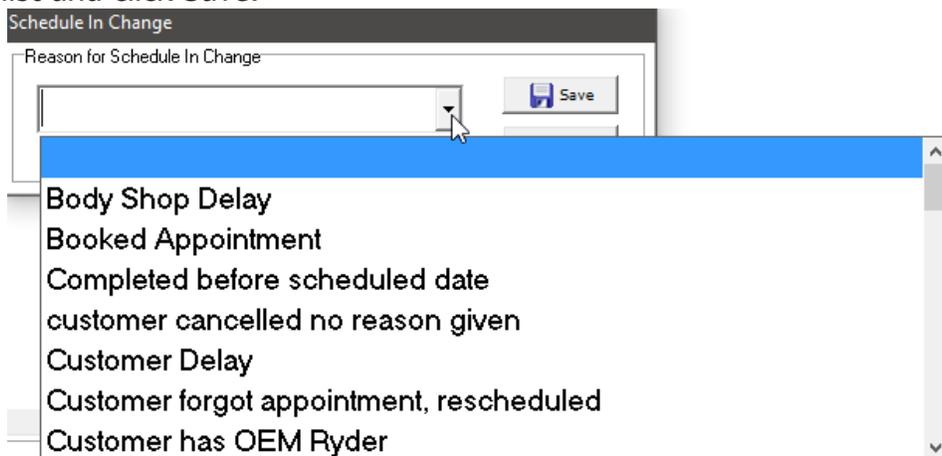
3. The *Scheduled In* and *Scheduled Out* dates are found in the customer information at the top of the screen (they are underlined and highlighted in blue)



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



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



Change Scheduled Out Date

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

Job Costing

Entering a Manual Vendor Cost

Summit automatically posts vendor costs as parts are received.

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

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

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

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

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

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

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

Receive Parts Details:

C.O.D. Invoice

Vendor: Lkq Viking Auto Salvage

Cost Center: Parts: Used/LKQ

Rec'd Date: 5/25/2016 Multiple

PO#: 19282-10

Inv #:

Inv Date: 5/25/2016

Inv Amount: 0

Tax Amount: 0 Add to Invoice Total

Due Date: 5/25/2016

List Amount: \$182.00

Calc'd Cost: \$140.00

[Scan Invoice](#)

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

Entering Manual Job Costing

Manually Flagging Flat Rate or Commission Labor Costs

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

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

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

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

Jobs Admin Line Items Parts **Job Costs**

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

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

Flag Labor

Technician: _____

Cost Center: _____

Date: 5/25/2016 B1: Shop Flanged: Avail: %:

Hours: _____ 0.0 0.0 0.0 0.0 0.00%

Amount: _____ \$0.00 \$0.00 \$0.00 0.00%

Notes:

Previously Flagged:

| technician | Cost_Center | Hours | Amount |
|------------|-------------|-------|--------|
| | | | |

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

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

Manually Entering Hourly Labor Costs

Hourly Job Costing and Technician Efficiency Measurement

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

The screenshot shows the 'Job Costs' tab selected in the software. A 'Tech Timesheet Entry' dialog box is open, allowing for the manual entry of labor costs. The 'New' button in the 'Job Costs' tab is circled in red. The dialog box contains the following fields:

- RO #: 19265
- Technician: Detail
- Cost Center: Prep Labor
- Department: Ins/Auth Hold
- Date: 5/18/2016
- Start Time: 12:00:00 AM
- End Time: 9:00:00 PM
- Hours: 0.0833333333333333
- Force OT: Amount: \$0.00
- Notes: Flat Rate

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

Manually Entering Hourly Labor Costs for Multiple Repair Orders

Hourly Job Costing and Technician Efficiency Measurement

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

The screenshot shows the 'Timesheets' tab selected in the software. A 'Tech Timesheet Entry' dialog box is open, allowing for the manual entry of labor costs for multiple repair orders. The 'Multiple' button in the 'Timesheets' tab is circled in red. The dialog box contains the following fields:

- RO #: 75656
- Technician: Darius McRae-Crooks
- Cost Center: Refinish Labor
- Department:
- Date: 5/25/2016
- Start Time: 12:00:00 AM
- End Time: 12:00:00 AM
- Hours: 0.0
- Force OT: Amount:
- Notes:

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

Costing Paint Materials, Hazardous Waste, and Shop Supplies

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

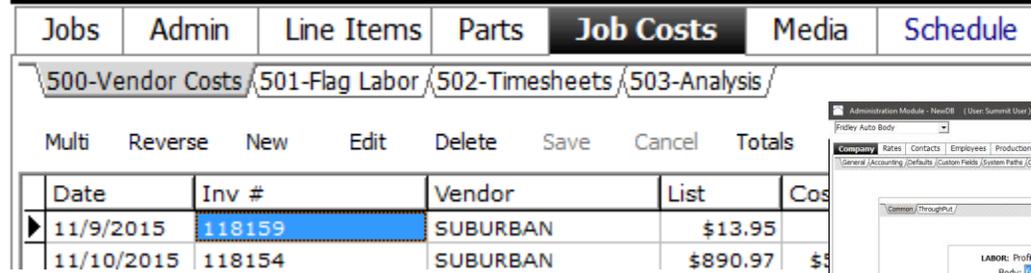
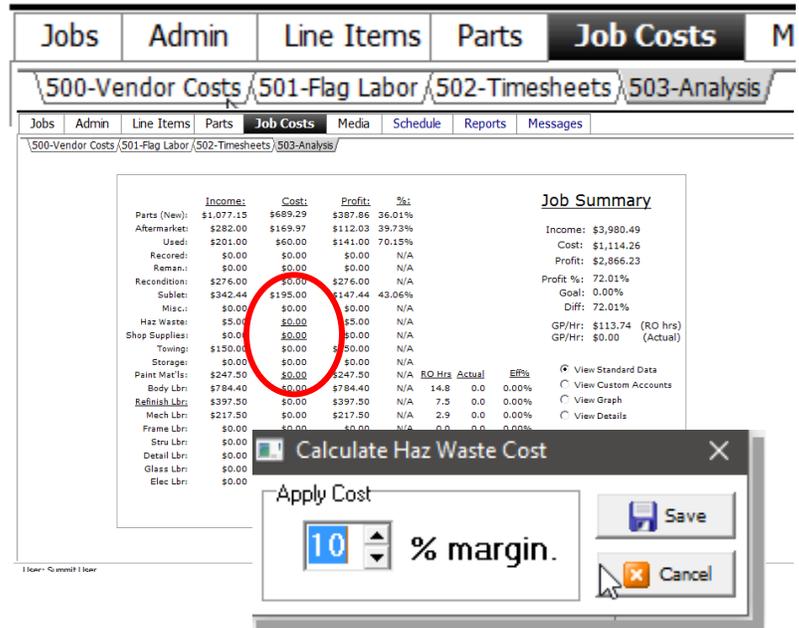
2. Click on the *Job Costs* button and choose the *Analysis* tab.

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

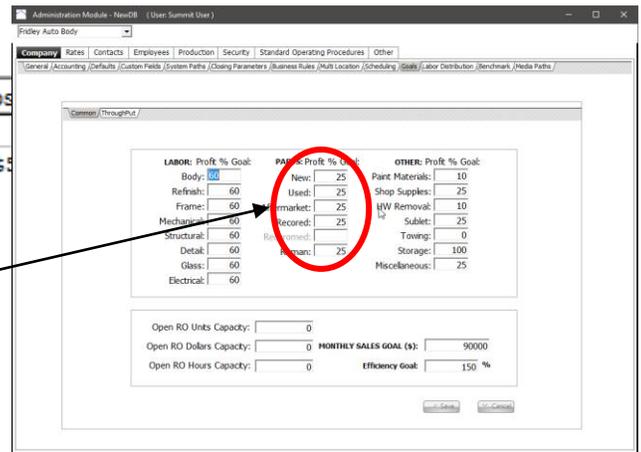
4. To post a cost for any of these categories, click the blue highlighted number in the *Cost* column.

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

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



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

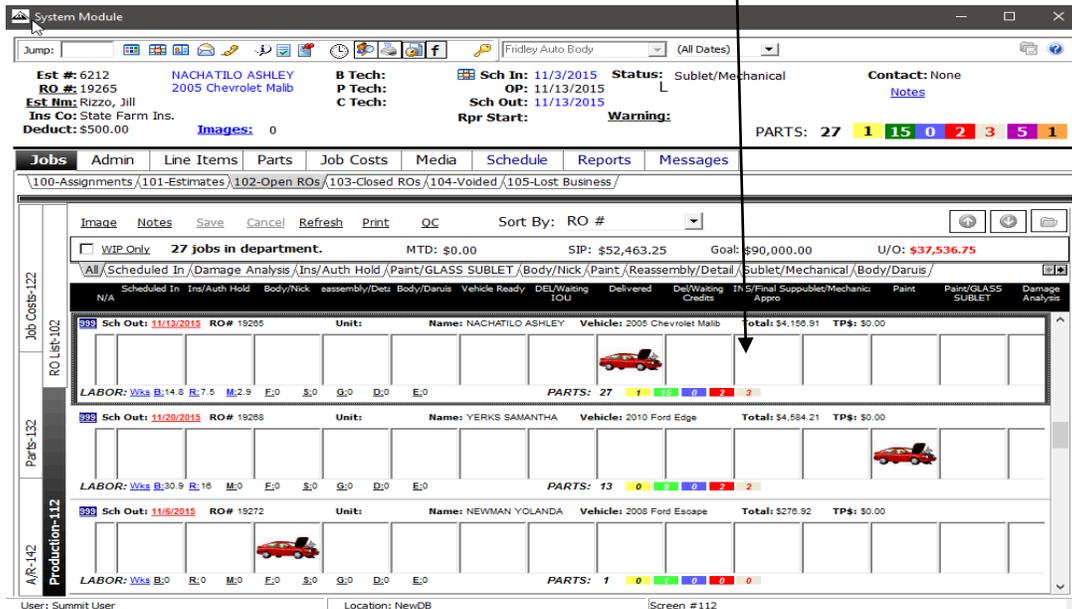


Vehicle Delivery

Vehicle Delivery Process

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

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



Customer Pay

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

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

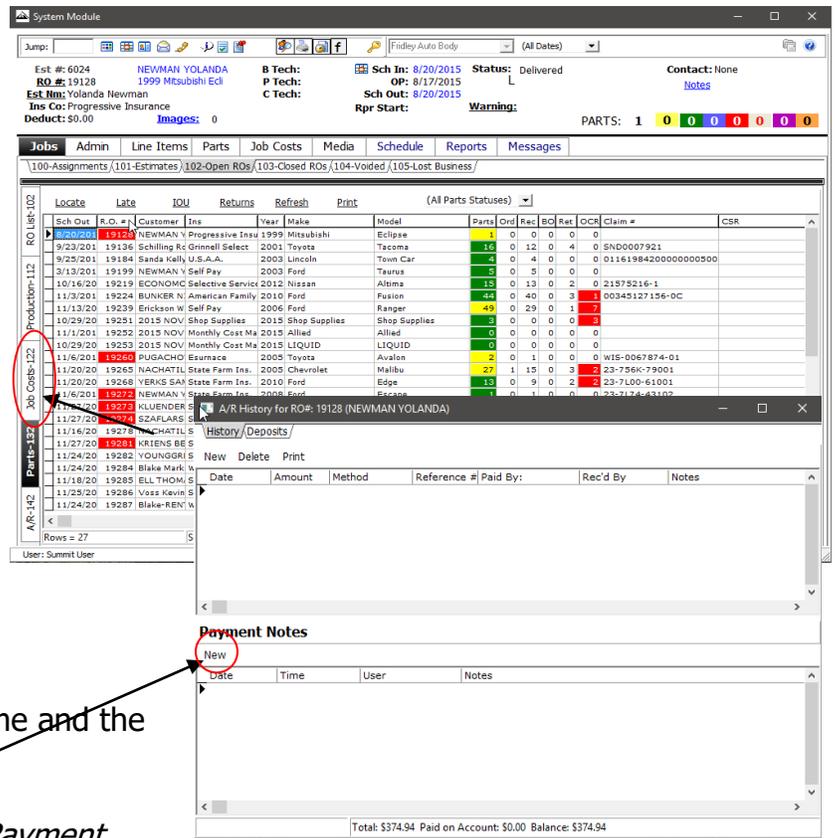
- CCC Estimate
- Summit Invoice with Rates
- Summit Collision Centers and Insurance Warranty documents.

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

3. Locate the customer name.

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

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



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

A/R Payment for RO#: 19293 (John Ferrari)

Payment Information

Payment Date: 5/26/2016 Current Balance: \$0.00

Amount: [] Deductible: \$0.00

Apply Payment to: []

Pay Method: []

Reference #: []

Paid By: Customer

Name of Payee: John Ferrari

Notes: []

Save Cancel Scan Payment

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

A/R History for RO#: 19290 (Voss RENTAL Kevin)

History Deposits

New Delete Print

Date Amount Report

Run Reports

A/R Payment History

Customer Receipt

Digital Authorization Status Fax Email PDF Print

Friday Auto Body
 480 Deanna Dr. SE
 Atlanta, GA 30322
 Ph: 770-764-4111 Fax: 770-764-4222

RO #: 19293
 Unit #:

Customer Receipt

Customer Information Vehicle Information Service DUBIT Insurance Information

Name: John Ferrari Vehicle: 2007 Red Ford Focus Tax Co: 0444742
 Address: 8411 W. 8400 St. Vin. Control #
 Phone: 202822 VIN: 1F4D994G0
 Make: FORD Year: 2007 Model: 4-Door Sedan
 Mileage: 12000

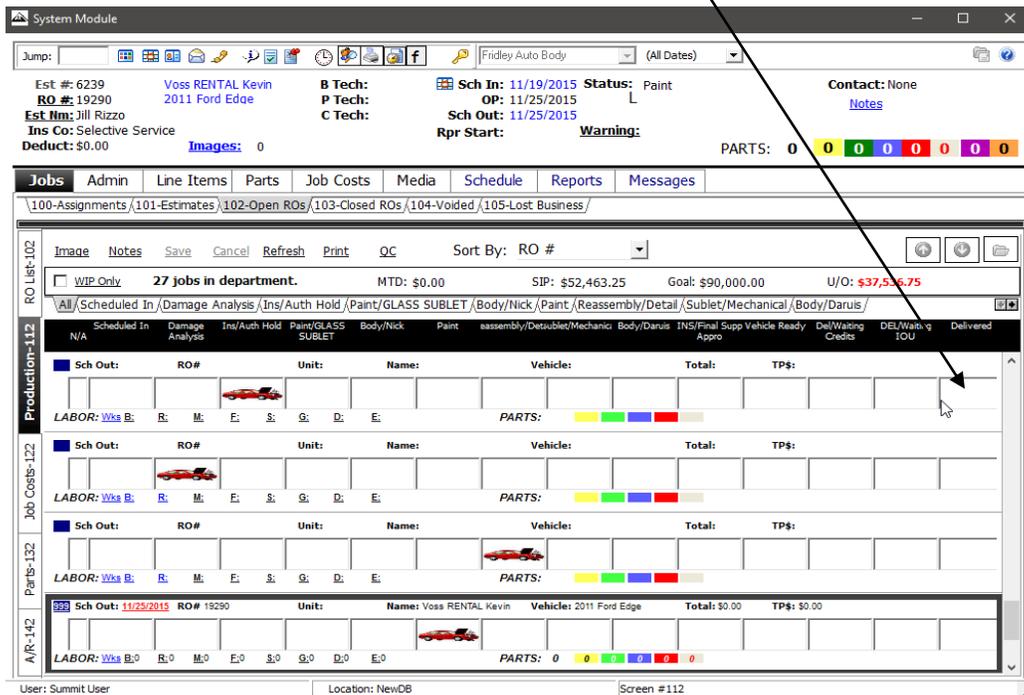
| Date | Reference | Received From | Received By | Amount |
|------------|-----------|---------------|-------------|--------|
| 05/26/2016 | | John Ferrari | Summit Lee | |

Date: _____ RO Total: \$0.00
 Signature: _____ Paid: \$0.00
 Balance Due: \$0.00

Vehicle Delivery Process (DRP)

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

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



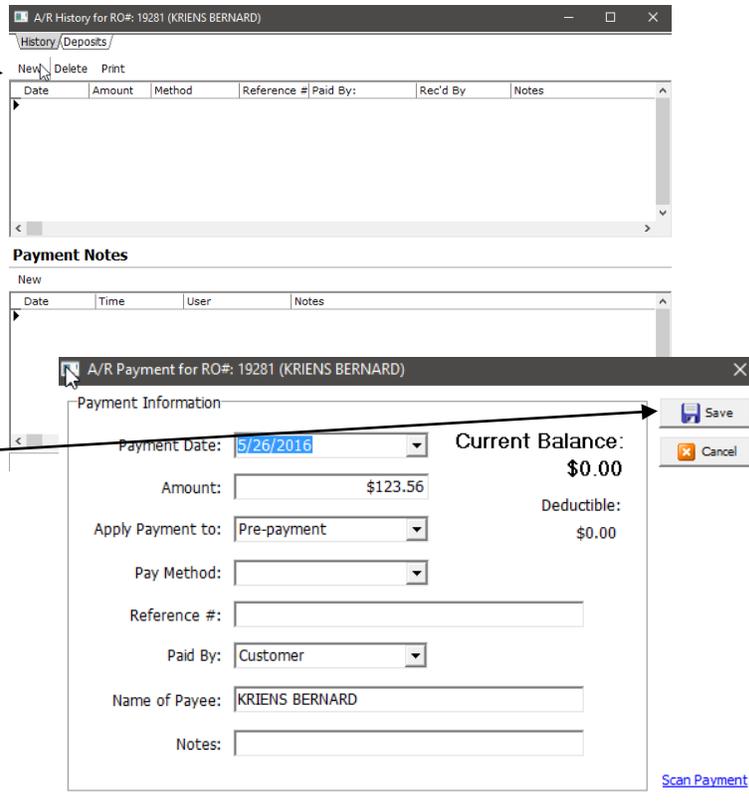
DRP

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

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

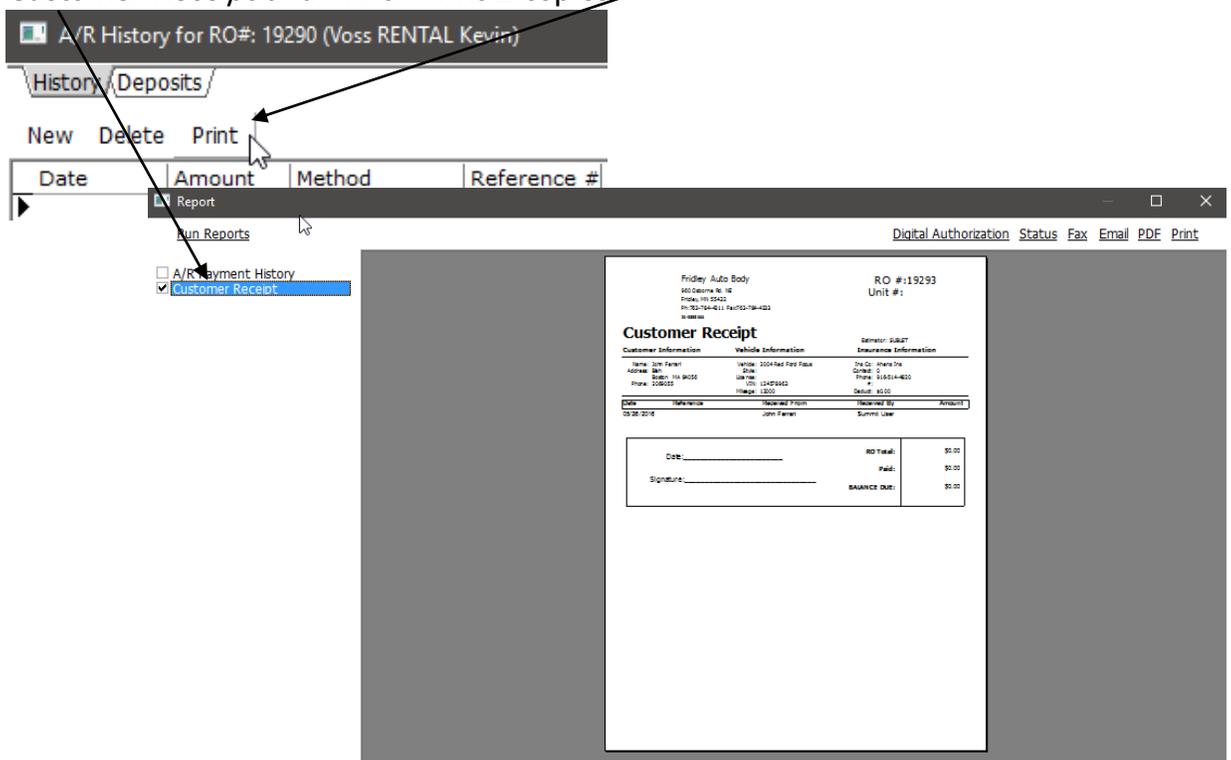
5. "Double Click" on the customer name and the following screen appears.

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



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

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



Pre-Close Process

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

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

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

B Tech: SJB
P Tech: 1971 MGB MGB
C Tech: SJB

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

Status: Reassembly
Contact: None

PARTS: 2 1 1 0 0 0 0 1

Jobs Admin Line Items Parts Job Costs Media Schedule Reports Messages

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

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

Rows = 178 Search Idle Refresh

User: Summit Test Employee Location: Server Screen #102

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

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

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

ECONOMON LOIS
2012 Nissan Altima

B Tech:
P Tech:
C Tech:

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

Status: Delivered
Contact: None

PARTS: 15 0 13 0 0 2 1 0

Jobs Admin Line Items Parts Job Costs Media Schedule Reports Messages

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

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

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

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

System Module

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

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

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

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

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

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

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

Receive Parts

Receive Parts Details:

C.O.D. Invoice

Vendor: Lkq Viking Auto Salvage

Cost Center: Parts: Used/LKQ

Rec'd Date: 5/25/2016 Multiple

PO#: 19282-10

Inv #: _____

Inv Date: 5/25/2016

Inv Amount: 0

Tax Amount: 0 Add to Invoice Total

Due Date: 5/25/2016

List Amount: \$182.00

Calc'd Cost: \$140.00

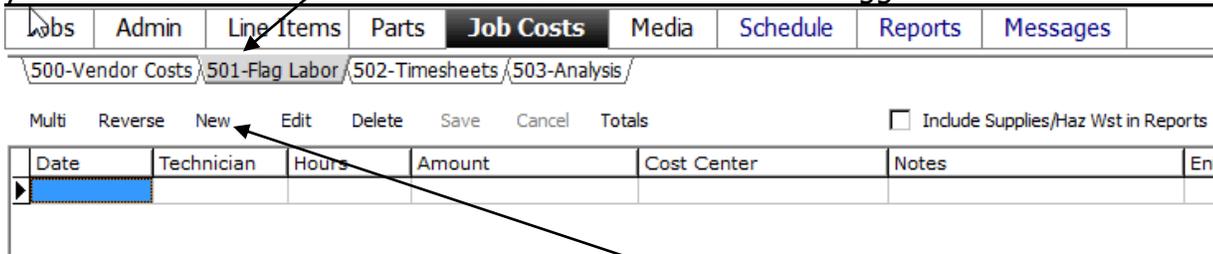
OK

Cancel

[Scan Invoice](#)

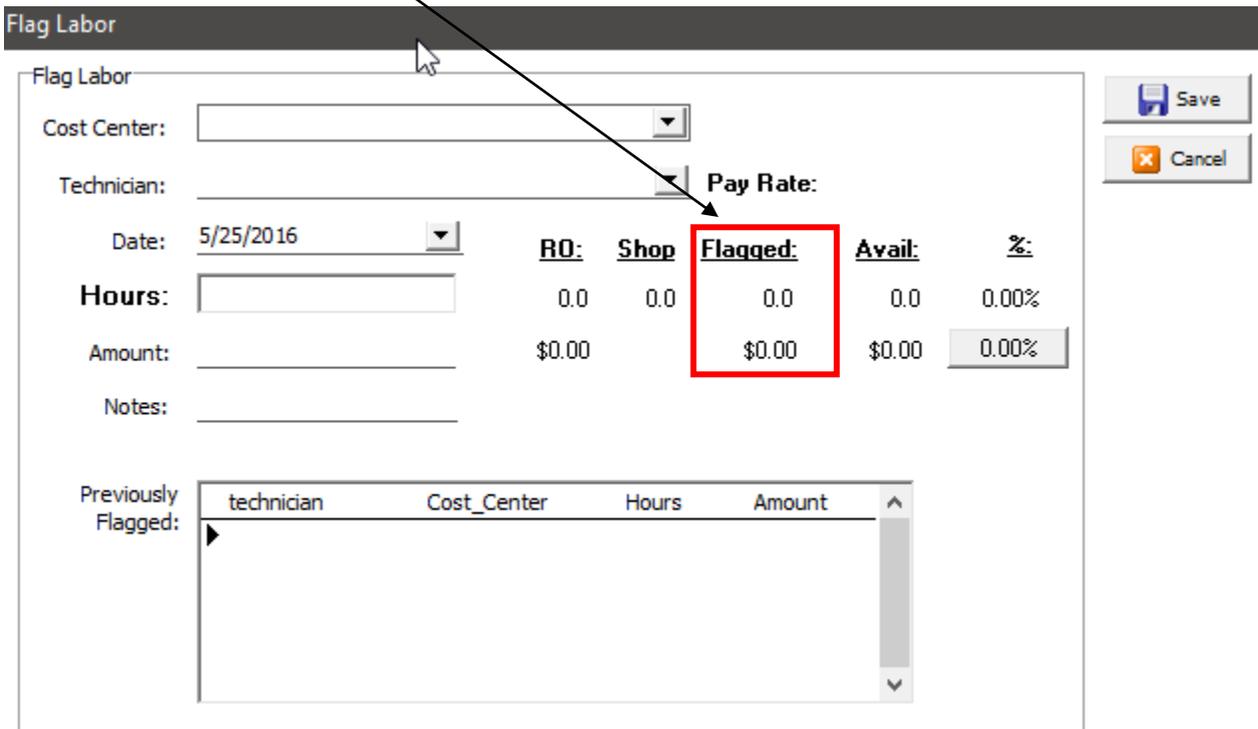
6. Enter in the appropriate invoice information.

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



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

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



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

| Jobs | Admin | Line Items | Parts | Job Costs | Media | Schedule | Reports | Messages | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|----------------|---------------|----------------|------------------|--------|----------|---------|----------|----------------|--------------|----------------|-----------|--------------|------------|----------|----------|--------|--------------|----------|----------|----------|--------|-------|----------|---------|----------|--------|-----------|--------|--------|--------|-----|---------|--------|--------|--------|-----|--------------|----------|--------|----------|-----|---------|----------|----------|----------|--------|--------|--------|--------|--------|-----|------------|--------|---------------|--------|-----|----------------|--------|---------------|--------|-----|---------|----------|--------|----------|-----|----------|--------|--------|--------|-----|---------------|----------|---------------|----------|-----|-----------|----------|--------|----------|-----|---------------|----------|--------|----------|-----|-----------|----------|--------|----------|-----|------------|--------|--------|--------|-----|-----------|--------|--------|--------|-----|-------------|--------|--------|--------|-----|------------|--------|--------|--------|-----|-----------|--------|--------|--------|-----|--|
| \500-Vendor Costs\501-Flag Labor\502-Timesheets\503-Analysis/ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table border="1"> <thead> <tr> <th></th> <th><u>Income:</u></th> <th><u>Cost:</u></th> <th><u>Profit:</u></th> <th><u>%:</u></th> </tr> </thead> <tbody> <tr><td>Parts (New):</td><td>\$1,077.15</td><td>\$689.29</td><td>\$387.86</td><td>36.01%</td></tr> <tr><td>Aftermarket:</td><td>\$282.00</td><td>\$169.97</td><td>\$112.03</td><td>39.73%</td></tr> <tr><td>Used:</td><td>\$201.00</td><td>\$60.00</td><td>\$141.00</td><td>70.15%</td></tr> <tr><td> Recorded:</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>N/A</td></tr> <tr><td> Reman.:</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>N/A</td></tr> <tr><td>Recondition:</td><td>\$276.00</td><td>\$0.00</td><td>\$276.00</td><td>N/A</td></tr> <tr><td> Sublet:</td><td>\$342.44</td><td>\$195.00</td><td>\$147.44</td><td>43.06%</td></tr> <tr><td> Misc.:</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>N/A</td></tr> <tr><td>Haz Waste:</td><td>\$5.00</td><td><u>\$0.00</u></td><td>\$5.00</td><td>N/A</td></tr> <tr><td>Shop Supplies:</td><td>\$0.00</td><td><u>\$0.00</u></td><td>\$0.00</td><td>N/A</td></tr> <tr><td> Towing:</td><td>\$150.00</td><td>\$0.00</td><td>\$150.00</td><td>N/A</td></tr> <tr><td> Storage:</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>N/A</td></tr> <tr><td>Paint Mat'ls:</td><td>\$247.50</td><td><u>\$0.00</u></td><td>\$247.50</td><td>N/A</td></tr> <tr><td> Body Lbr:</td><td>\$784.40</td><td>\$0.00</td><td>\$784.40</td><td>N/A</td></tr> <tr><td> Refinish Lbr:</td><td>\$397.50</td><td>\$0.00</td><td>\$397.50</td><td>N/A</td></tr> <tr><td> Mech Lbr:</td><td>\$217.50</td><td>\$0.00</td><td>\$217.50</td><td>N/A</td></tr> <tr><td> Frame Lbr:</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>N/A</td></tr> <tr><td> Stru Lbr:</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>N/A</td></tr> <tr><td> Detail Lbr:</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>N/A</td></tr> <tr><td> Glass Lbr:</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>N/A</td></tr> <tr><td> Elec Lbr:</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>N/A</td></tr> </tbody> </table> | | | | | | | | | <u>Income:</u> | <u>Cost:</u> | <u>Profit:</u> | <u>%:</u> | Parts (New): | \$1,077.15 | \$689.29 | \$387.86 | 36.01% | Aftermarket: | \$282.00 | \$169.97 | \$112.03 | 39.73% | Used: | \$201.00 | \$60.00 | \$141.00 | 70.15% | Recorded: | \$0.00 | \$0.00 | \$0.00 | N/A | Reman.: | \$0.00 | \$0.00 | \$0.00 | N/A | Recondition: | \$276.00 | \$0.00 | \$276.00 | N/A | Sublet: | \$342.44 | \$195.00 | \$147.44 | 43.06% | Misc.: | \$0.00 | \$0.00 | \$0.00 | N/A | Haz Waste: | \$5.00 | <u>\$0.00</u> | \$5.00 | N/A | Shop Supplies: | \$0.00 | <u>\$0.00</u> | \$0.00 | N/A | Towing: | \$150.00 | \$0.00 | \$150.00 | N/A | Storage: | \$0.00 | \$0.00 | \$0.00 | N/A | Paint Mat'ls: | \$247.50 | <u>\$0.00</u> | \$247.50 | N/A | Body Lbr: | \$784.40 | \$0.00 | \$784.40 | N/A | Refinish Lbr: | \$397.50 | \$0.00 | \$397.50 | N/A | Mech Lbr: | \$217.50 | \$0.00 | \$217.50 | N/A | Frame Lbr: | \$0.00 | \$0.00 | \$0.00 | N/A | Stru Lbr: | \$0.00 | \$0.00 | \$0.00 | N/A | Detail Lbr: | \$0.00 | \$0.00 | \$0.00 | N/A | Glass Lbr: | \$0.00 | \$0.00 | \$0.00 | N/A | Elec Lbr: | \$0.00 | \$0.00 | \$0.00 | N/A | <h3>Job Summary</h3> <p>Income: \$3,980.49 Cost: \$1,114.26 Profit: \$2,866.23 Profit %: 72.01% Goal: 0.00% Diff: 72.01% GP/Hr: \$113.74 (RO hrs) GP/Hr: \$0.00 (Actual)</p> <p> <input checked="" type="radio"/> View Standard Data <input type="radio"/> View Custom Accounts <input type="radio"/> View Graph <input type="radio"/> View Details </p> <p> <input checked="" type="checkbox"/> <input type="checkbox"/> Print </p> |
| | <u>Income:</u> | <u>Cost:</u> | <u>Profit:</u> | <u>%:</u> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Parts (New): | \$1,077.15 | \$689.29 | \$387.86 | 36.01% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Aftermarket: | \$282.00 | \$169.97 | \$112.03 | 39.73% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Used: | \$201.00 | \$60.00 | \$141.00 | 70.15% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Recorded: | \$0.00 | \$0.00 | \$0.00 | N/A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Reman.: | \$0.00 | \$0.00 | \$0.00 | N/A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Recondition: | \$276.00 | \$0.00 | \$276.00 | N/A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Sublet: | \$342.44 | \$195.00 | \$147.44 | 43.06% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Misc.: | \$0.00 | \$0.00 | \$0.00 | N/A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Haz Waste: | \$5.00 | <u>\$0.00</u> | \$5.00 | N/A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Shop Supplies: | \$0.00 | <u>\$0.00</u> | \$0.00 | N/A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Towing: | \$150.00 | \$0.00 | \$150.00 | N/A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Storage: | \$0.00 | \$0.00 | \$0.00 | N/A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Paint Mat'ls: | \$247.50 | <u>\$0.00</u> | \$247.50 | N/A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Body Lbr: | \$784.40 | \$0.00 | \$784.40 | N/A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Refinish Lbr: | \$397.50 | \$0.00 | \$397.50 | N/A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Mech Lbr: | \$217.50 | \$0.00 | \$217.50 | N/A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Frame Lbr: | \$0.00 | \$0.00 | \$0.00 | N/A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Stru Lbr: | \$0.00 | \$0.00 | \$0.00 | N/A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Detail Lbr: | \$0.00 | \$0.00 | \$0.00 | N/A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Glass Lbr: | \$0.00 | \$0.00 | \$0.00 | N/A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Elec Lbr: | \$0.00 | \$0.00 | \$0.00 | N/A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | RO Hrs | Actual | Eff% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | 14.8 | 0.0 | 0.00% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | 7.5 | 0.0 | 0.00% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | 2.9 | 0.0 | 0.00% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | 0.0 | 0.0 | 0.00% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | 0.0 | 0.0 | 0.00% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | 0.0 | 0.0 | 0.00% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | 0.0 | 0.0 | 0.00% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | 0.0 | 0.0 | 0.00% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

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

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

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

Job Closing

Summary

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

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

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

System Module

Jump: Findley Auto Body (All Dates)

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

Jobs Admin Line Items Parts Job Costs

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

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

Report

Run Reports Digital Authorization Status Fax Email PDF Print

Job Cost Summary
 Pre-Close Report

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

Print

User: Summit User Location: NewDB Screen #503

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

Enter in a note "File Pre-Closed".

System Module

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

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

Jobs Admin Line Items Parts Job Costs Job History/Notes

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

New Delete Save Cancel Print

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

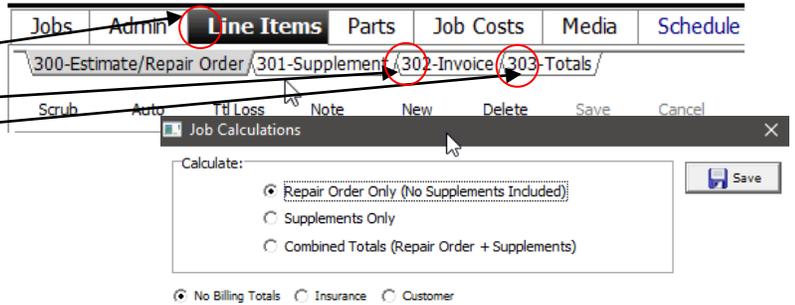
Search Idle

Expanded Notes

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

14. Print Customer Invoice:

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



- g. Select Final *Invoice with Rates*.

15. Turn completed file over to CSR.

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

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

Print Estimate Format

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

NOTE: All Files should include the following paperwork:

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

Synchronizing and Parts Price Changes

Synchronizing a Summit Repair Order with an Estimating System Supplement

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

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

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

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

5. Create the export file in the estimating system.

The screenshot displays the Summit software interface. At the top, there's a header for 'Friday Auto Body' with various job details like 'Est. #', 'RO #', and 'Sch. In'. Below this, there are tabs for 'Jobs', 'Line Items', 'Parts', 'Job Costs', 'Media', 'Schedule', 'Reports', and 'Messages'. The 'Line Items' tab is selected, showing a table of items. A 'Supplement' window is open, showing details for a 'Parts Price Change Report'. The report includes customer information (Friday Auto Body), vehicle information (2005 Toyota Avalon), and insurance information (Esurance). The main table in the 'Line Items' tab has the following data:

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

The 'Supplement' window shows a 'Parts Price Change Report' with the following details:

Friday Auto Body
R.O. #: 19260
Unit #:
Customer Information: Friday Auto Body
Vehicle Information: 2005 Toyota Avalon
Insurance Information: Esurance

Sending Parts Price Changes BACK into Your Estimating Systems

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

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

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

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

The screenshot displays the Summit software interface. At the top, a header shows 'System Module' and 'Eveland Bros. Body Shop In'. Below this, a summary section includes 'Unit #: Crews Michael', 'RO #: 45122', 'B Tech: SJB', 'Sch In: 10/10/2013', 'Status: Reassembly', and 'Contact: None'. A 'Jobs' menu is visible with options like 'Admin', 'Line Items', 'Parts', 'Job Costs', 'Media', 'Schedule', 'Reports', and 'Messages'. The main area shows a table of ROs with columns for 'R.O. #', 'Sch In', 'Sch Out', 'TT', 'CDR', 'Dept/Status', and 'Job Class'. A 'PPC' icon in the toolbar is circled in red. A 'Parts Price Changes' dialog box is open, showing a table with columns for 'Tag', 'L #', 'Description', 'Price', 'Adj Price', and '% Diff'. The 'Tag' button in this dialog is also circled in red. At the bottom of the dialog, the 'Print PPC List' button is circled in red. The 'Totals' section at the bottom right shows '\$0.00 \$0.00 \$0.00'.

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

Accessing and Utilizing Reports

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

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

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

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

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

SummitCRS Reports

800-Reports

010-Sales

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

Print | Graphs

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

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

Print Options

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

Select Companies:

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

Select Job Classifications:

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

Select Estimators:

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

Select CSRs:

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

Start | Cancel | Export

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

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

Recommended Reports: 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.

- The goal of every RO is 42%
- **REMEMBER**...each Profit Center **MUST** have an offsetting cost!

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

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 of 45% and 60%.

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.

| R.O.# | Sch In | Sch Out | C/P | Oper/Status | Job Class | Total | Ins | Estimator | Customer |
|-------|------------|------------|------|--------------|--------------------|-------------|-----------------------|------------------|--------------|
| 45122 | 10/10/2013 | 12/31/2015 | 0.04 | -251 | Reassembly | \$1,171.48 | State Farm Insurance | Unassigned | Cress Mich |
| 45123 | 10/10/2013 | 12/31/2015 | 0.04 | -251 | Detail/OC | \$9,213.78 | Geico | Ty Cowan | Paul Jess |
| 45985 | 7/4/2015 | 7/4/2015 | 0.00 | Not Assigned | | \$189.25 | USA | John Pankau | Watts Karen |
| 47925 | 7/4/2015 | 7/4/2015 | 0.11 | -278 | Body Damage Repair | \$3,973.64 | Salco | Ty Cowan | Power Tim |
| 48492 | 4/20/2015 | 5/7/2015 | 0.05 | -291 | Paint | \$1,882.56 | Cameron Mutual | John Pankau | Shumaker |
| 47345 | 10/2/2014 | 7/4/2015 | 0.00 | -580 | Body Damage Repair | \$407.34 | Geico | Ty Cowan | Paul Jess |
| 47839 | 7/4/2015 | 7/4/2015 | 0.00 | Scheduled In | Small Repair | \$27.156 | CUSTOMER PAY | John Pankau | Browning R |
| 48020 | 7/4/2015 | 7/4/2015 | 0.00 | Scheduled In | Small Repair | \$1,424.94 | Customer Pay | Unassigned | Hanlick J |
| 47648 | 7/4/2015 | 7/4/2015 | 0.00 | Scheduled In | Small Repair | \$1,156.26 | Customer Pay | Dan Oelschlaeger | Ganning I |
| 47674 | 7/4/2015 | 7/4/2015 | 0.00 | Scheduled In | Small Repair | \$1,094.51 | Travelers | Mark Eerland | Castella Ann |
| 47683 | 12/2/2014 | 7/4/2015 | 0.00 | -539 | Not Assigned | \$950.00 | Geico | Ty Cowan | Paul Jess |
| 48603 | 7/4/2015 | 7/4/2015 | 0.00 | Scheduled In | Small Repair | \$168.65 | American Family Insur | John Pankau | Boyle Laurr |
| 47758 | 7/4/2015 | 7/4/2015 | 0.00 | Scheduled In | Paint/Detail | \$1,218.82 | Customer Pay | Dan Oelschlaeger | Gillespie Cl |
| 47773 | 12/29/2014 | 5/15/2015 | 0.00 | Delivered | Loose Parts, Mech | \$684.27 | Customer Pay | John Pankau | Pankau Joh |
| 48320 | 5/12/2015 | 5/12/2015 | 0.00 | Scheduled In | Small Repair | \$1,038.03 | State Farm Insurance | John Pankau | FLR Medic |
| 48209 | 3/12/2015 | 4/6/2015 | 0.14 | -432 | Delivered | \$5,768.36 | USA | Dan Oelschlaeger | Eakins Dan |
| 48184 | 4/30/2015 | 5/6/2015 | 0.06 | -384 | Delivered | \$1,721.78 | Customer Pay | John Pankau | Paale John |
| 48576 | 5/18/2015 | 5/22/2015 | 0.00 | Scheduled In | Medium Repair | \$2,753.16 | American Family Insur | Jim Shannon | McCoy Nic |
| 48356 | 4/27/2015 | 5/5/2015 | 0.03 | -383 | Delivered | \$2,753.44 | Customer Pay | Jack Kimlin | Essary Ron |
| 48337 | 5/6/2015 | 5/18/2015 | 0.00 | Scheduled In | Medium Repair | \$2,651.13 | Customer Pay | Jack Kimlin | Essary Ron |
| 48252 | 5/20/2015 | 6/11/2015 | 0.00 | Scheduled In | Medium Repair | \$4,226.43 | Farmers Insurance | Dan Oelschlaeger | Stewart Col |
| 48259 | 4/15/2015 | 5/11/2015 | 0.19 | -414 | Reassembly | \$16,023.93 | Chubb Insurance | Dan Oelschlaeger | Van Dyk T |

Sales and Marketing: Weekly

System Module

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

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

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

SubmitCRS Reports

800-Reports

Print Graphs

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

Jobs Admin

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

User: Summit User Location: NewDB Screen #800

Work in Process: Monthly

System Module

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

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

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

SubmitCRS Reports

800-Reports

Print Graphs

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

Jobs Admin

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

User: Summit User Location: NewDB Screen #800

Technician Efficiency: Weekly

System Module

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

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

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

SummitCRS Reports

800-Reports

Jobs Admin

Legacy
ReportPro
Graphs
KPINet

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

Print Graphs

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

User: Summit User Location: NewDB Screen #800

Payment Report: Daily

System Module

Jump: [Icons] Fridley Auto Body

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

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

SummitCRS Reports

800-Reports

Jobs Admin

Legacy
ReportPro
Graphs
KPINet

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

Print Graphs

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