SUMMIT SOFTWARE SOLUTIONS

ACHIEVE PEAK PERFORMANCE
IN YOUR BUSINESS!

Quick Start: Production and Scheduling

TRAINING AND REFERENCE MANUAL

SUMMIT
Technical Support

Contents

Overview

Summit Software Solutions, Inc. offers the Collision Repair Industry the most complete and flexible Scheduling, Dispatching, and Production Management Software.

This document has been designed to help Summit users:

- Improve their knowledge of scheduling, dispatching, technician and production management with the Summit management software.
- Improve their knowledge of Summit's navigation and information management / distribution within these modules.
- Better understand how the Administration and Setup Module affects scheduling, dispatching, and production management.
- Improve communication within and outside the shop.
- How to improve scheduling, dispatching, and production processes within their facilities.
- How to better use and understand scheduling, dispatching, and production reports.

Scheduling: Determining How "Deep" You Want to Go

Summit presently offers several different levels of shop scheduling. To utilize and benefit from them you must first decide how in depth you feel your Collision Repair Business needs/wants to implement scheduling. In order to determine how "deep" you want to go, here is an overview of Summit's Scheduling Capabilities.

- Appointments
- Specific Estimate and Repair Order Activities
- Automated Scheduled In and Out Dates based on shop capacity, available Technicians, and Touch Time
- Daily Variance
- Automated Scheduling Assistance based on square footage, stalls, sales goals, average severity, batting average, and cycle times
- Touch Time calculations per Insurer and Fleets
- Automated repair classification by severity
- Departmental Capacity
- Departmental Administrative Days
- Automated communications based on vehicle repair progress compared to schedule
- Several different scheduling report options

Appointments

Summit offers a complete calendaring solution designed to help with many different types of appointments. Here are some examples of appointments you can schedule and manage in Summit.

- Personal appointments
- Estimate appointments
- Estimate follow up appointments
- Repair order communication appointments
- Repair Order follow up appointments
- IOU appointments
- CSI follow up appointments

1. To access and view Summit's daily appointment option, click on the Schedule Tab and then the Appointments Tab, here you will see all appointments for everyone in the business that day.
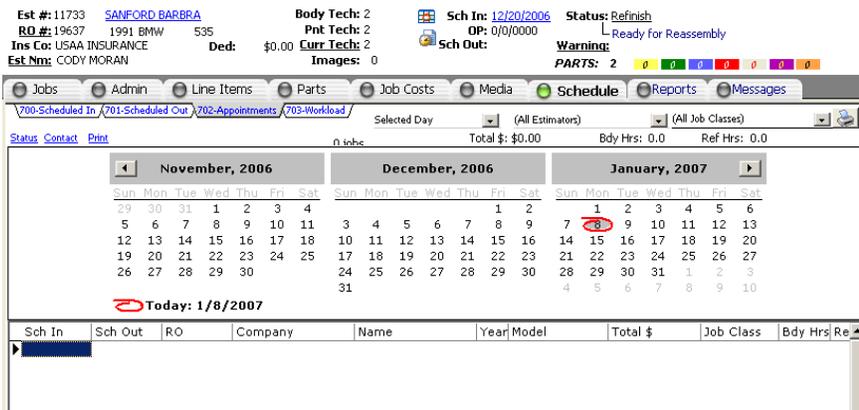
2. To schedule a New Appointment; click on the New Icon and begin filling out the new line with a date, time, name of the employee, and a brief description of what the appointment is for.
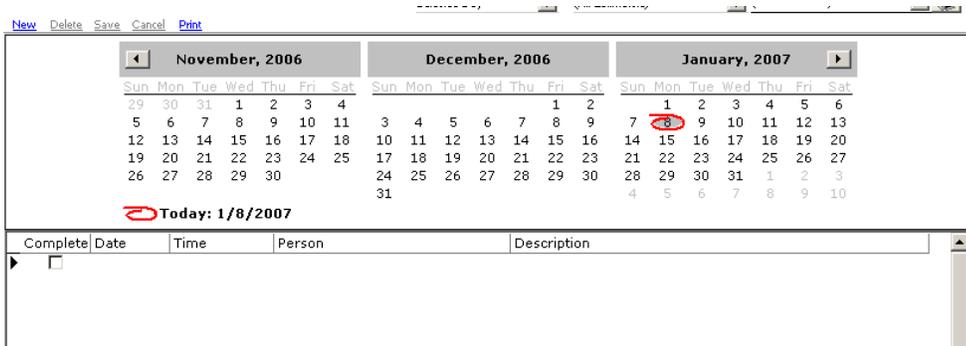
You can sort any column. Just click on the column header. For example, if you want to see the appointments sorted by time, simply click on the *Time* column header and the appointments will be sorted.

Estimate Follow Up Appointments

1. To schedule appointments to follow up on estimates, select the Estimate Tab and the specific estimate you want to schedule a follow up with.

2. "Right click" on the estimate and select *Quick Menu*, then click *Schedule an Appointment*.

After "clicking" *Schedule an Appointment* the appointment dialog box will appear where you have several choices. These entries appear under the *Appointments Tab* in the *Schedule Tab*.

Repair Order Follow Up and Communication Appointments

1. To schedule appointments to follow up on Repair Orders, select the *Open* or *Closed* RO Tab and the specific Repair Order you want to schedule a follow up with.

2. "Right click" on the Repair Order and select *Quick Menu*, then click *Schedule an Appointment*. You can also "click" on the *Appointment Icon* at the top of the screen.

After "clicking" *Schedule an Appointment* the appointment dialog box will appear where you have several choices. These entries appear under the *Appointments Tab* in the *Schedule Tab*. Please note that you can schedule other users as well as recurring contact appointments.

IOU Appointments

IOU appointments in Summit are designed to help you improve your customer loyalty and satisfaction. Summit provides you with a tool that schedules and tracks follow up communications for all customers that you might "owe". For example, an IOU would be a vehicle has been delivered BUT the vehicle still needs a molding, stripe, label, or some other part.

1. To schedule an IOU appointment for follow up on a Repair Order, click on the *Open* or *Closed* RO Tab and the specific Repair Order you want to schedule a follow up with.

2. "Right click" on the Repair Order and select *View IOU Items*. You can also "click" on the *IOU Icon* at the top of the screen.

3. After "clicking" the *View IOU Items* or *ICON* the IOU appointment tracking dialog box will appear. To enter an IOU appointment, simply click on the *New Icon*. The Summit IOU system automatically enters today's date and projects an automated follow up 7 days out. Type in a description of the item you owe the client and select if it is on order or received.

Automated CSI Follow Up Appointments

Automated CSI Follow Up appointments in Summit are designed to help you improve your customer loyalty and satisfaction. Summit provides you with a tool that automatically schedules follow up appointments for Estimators and CSR's. To enable this option, login to the Administration Module, select Business Rules, and Appointments. Select the option you want then Summit will automatically schedule a follow up appointment for your Estimators or CRS's seven (7) days after the RO has been closed in Summit.

Automated Scheduled In and Out Dates

Based on Shop Capacity, Available Technicians, and Touch Time - If you want to improve your delivery date accuracy, shop workflow, and customer satisfaction Summit's Automated Scheduled In and Out Dates feature will help you. To begin benefiting from this feature there are several steps you must complete first.

Shop Capacity

1. You will need to determine how many <u>total</u> hours your shop can produce. This can be done with the following calculation:
- # of Technicians X 8 = total # of hours worked per day
- Technician Efficiency: # of works worked/# of hours produced.

NOTE: The best technicians can produce at an efficiency rate of 200%. If you do not know, your technician's efficiency starts at 100%.

2. Once you have calculated the # of hours your shop can produce per day, access Summit's Administration Module, select the Scheduling Tab, and enter in your number in the *Production Hours per Day* field.

You can also add a variance % that will allow you to "overbook" for that day. This will help you allow for walk-ins or other

You can also "remove" hours from each day for tech vacations and other events. By doing this Summit removes those hours from that

Summit's Benchmark Offers Scheduling Assistance

1. If you would like a little help determining how you need to schedule, Summit offers you the Benchmark/Shop Data Tab. To benefit from this tab, you need to fill out the top area of the screen.

2. Click on the *Apply √.* Once the *Apply √* is clicked Summit will recommend your scheduling capacities.

Administration Module - DBServer   (User: SUMMIT USER)

Company | Rates | Contacts | Employees | Production | Security | Standard Operating Procedures | Other

General | Accounting | Defaults | Custom Fields | System Paths | Closing Parameters | Business Rules | Multi Location | Scheduling | Goals | Labor Distribution | Benchmark | Media Paths

Shop Data | Benchmark

Historical Data: 6/11/2010   (<-- Utilize data 30 days back from this date)

Total Shop Sq Ft: 46000   Production Sq Ft: 40000   # Stalls: 50

Sales Goal/Mo.: $500,000.00   Avg Severity: $2,294.23   Bat Avg: 67.00%

Paint: Standox (Dupont)   ✔ Apply

# of Estimates: 325   # of RO's: 218   Cycle Time: 10

Driveable: 153   # Non-Driveable: 44   # Ttl Loss: 22

Scheduling Assistance:

Based on the above information, you should schedule:

___ vehicles per day   ___ hours per day   ___ dollars per day

___ vehicles per week   ___ hours per week   ___ dollars per week

(click the 'Apply' button above to recalculate)

Save   Cancel

Touch Time By Insurance Company and Fleet Account

To properly schedule and match the rules and expectations of your insurance and fleet customers, you need to set up the "Touch Time" agreements you have with each of them. To set that up in Summit access the Administration Module, Contact, Insurance Companies, Admin and enter the Touch Time hours per day number you have agreed to with your Insurance or Fleet Customer.
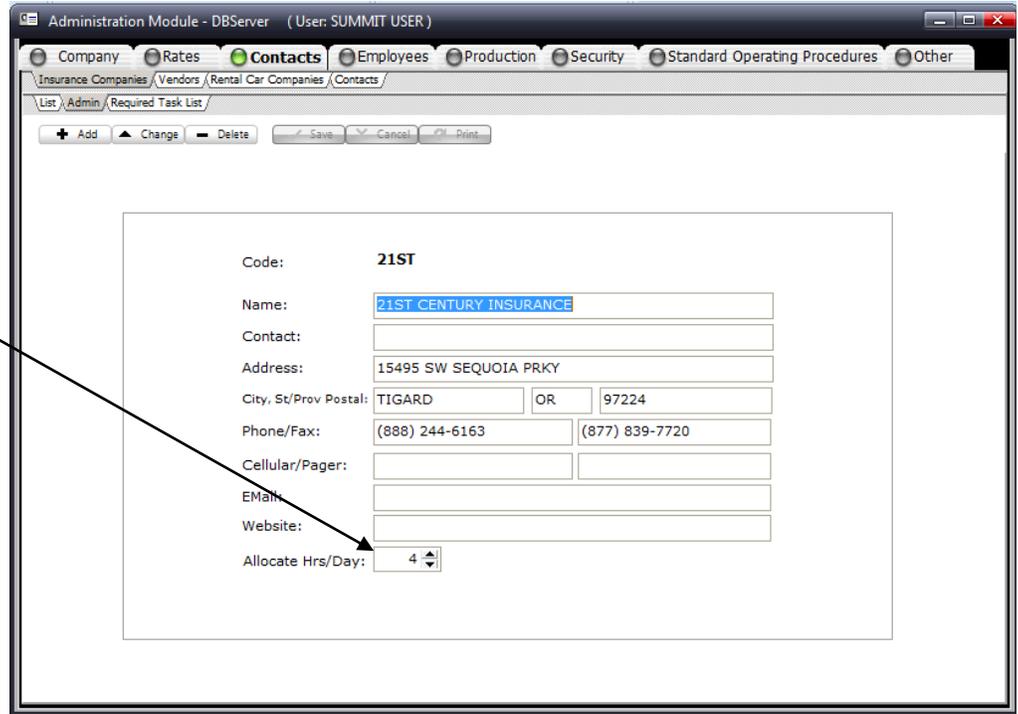
Utilizing Capacity Based Scheduling

Once you have set up Shop Capacity and Touch Time in the Administration Module you can begin utilizing Summit's Overall Capacity based scheduling:

1. Select Estimate from *Estimate Tab.*

2. "Left Click", hold, and "drag" estimate up to *Open RO's Tab.*

3. Release "Left Click" on *Open RO's Tab* and follow the Summit RO Wizard.
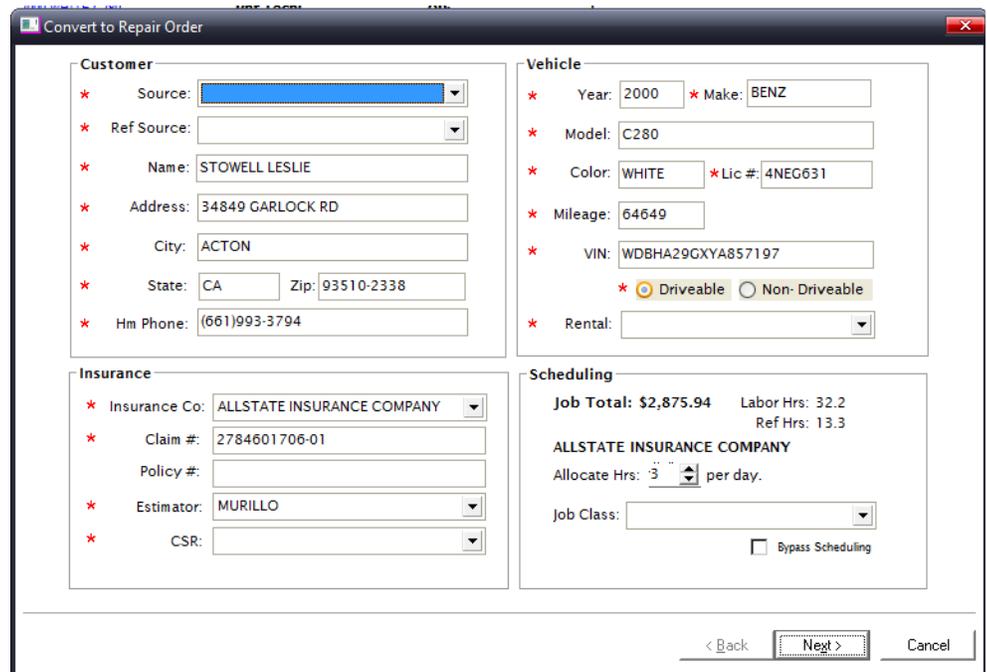
There are several important items and actions that will occur to assist you with your scheduling.

$ and Hours provide you with severity info on this RO.

Pre-Selecting the insurer from the previous Full Convert screen also selects per day **Touch Time** hours.

Scheduling

Job Total: $2,875.94   Labor Hrs: 32.2
                        Ref Hrs: 13.3

ALLSTATE INSURANCE COMPANY

Allocate Hrs: 3 ⬍ per day.

Job Class: [   ] ▼

☐ Bypass Scheduling

Summit can also automatically classify the repair based on the severity of the RO!

4. Once you "click" the *Next Box* the Summit Scheduling Calendar will appear. Summit automatically selects the next available Scheduled In and Target Delivery Date based on your shop's capacity as well as the # of hours per day of Touch Time. **Green** Circles indicate you have more hours to schedule, **Yellow** Circles indicate you are at an "ideal" number, and **Red** Circles indicate you are overbooked.

Automated Repair Classification based on Repair Order Severity

Another scheduling assistance option Summit offers is the ability to classify repairs by severity. The benefit of this option is that you now will be able to schedule repairs not only by shop capacity but also by "mix".

As you are probably aware, a Collision Repair Facility operates best when there is a steady "flow" of work through each step of the repair process. By automatically "classifying" repairs by severity, Summit will help you schedule the right "mix" to keep you repair facility "humming" like a fine tuned engine.

1. To set up Summit's Repair Classification based on Repair Order Severity you need to log into the *Administration Module*, Select *Production*, and then *Job Classifications***.**

Summit offers you up to 10 customizable Job Classifications with the ability to set the # of Body, Refinish, Frame, and Structural Hour Limits and whether a "class" includes Sublet or not. The last entry will be what your Gross Profit % goal is for each "class".

2. You can also select the color of each "class" by "right clicking" on each one.

ID	Description	Bdy Limit	Ref Limit	Fr/Str Limit	Sublet?	GP % Goal
1	1-Day Repair	10	4	0	No	45.00%
2	Express Repair	11	6	0	Either	48.00%
3	Light Damage	18	12	4	Either	45.00%
4	Medium	22	16	6	Yes	45.00%
5	Heavy Hit	50	25	10	Either	42.00%
6	Train Wreck	100	30	25	No	35.00%
7	Miscellaneous	0	0	0	No	0.00%
8	Write Off	0	0	0	No	0.00%
9	Not Here Parts Ordered	0	0	0	No	0.00%
10	Warranty	0	0	0	No	0.00%

3. Once you have set up Repair Classifications in the Administration Module you can begin utilizing Summit's Repair Classification during the scheduling process: See - Utilizing Capacity Based Scheduling

You can also view the details of the Repair Schedule by "double clicking" on any specific day on the calendar.

Advanced Departmental Scheduling and Communication System

RPM incorporates technology and processes based on several scheduling and production management disciplines such as, MRP (Manufacturing Resource Planning), Six Sigma, Theory of Constraint, and Lean Job Shop Manufacturing. We believe that with the "right" processes and implementation RPM™ can help collision repairers:

- Improve overall production through-put in 60 days
- Reduce supplements to 15%
- Increase in through-put $$'s substantial
- Increase touch times at 6-7 hours per vehicle per day
- Reduce cycle time to 4-5 days including weekends.
- Dramatically increase Cash flow.
- Ultimately leading to Net profits quadrupling (or more) in first year

The initial step in implementing Summit's RPM system is to make the commitment that you are going to change the way you "schedule" and dispatch repairs. To achieve the full benefit of RPM we suggest that you consider the following process changes:

Solution Overview

Setting Up The Departmental Scheduling and Communication System

Setting up Departments

1. The first step in implementing Summit's RPM system is to make sure your departments/repair processes are correct. To check this: log into the *Administration Module* and the *Production Tab.*

2. Make sure you are satisfied with the description of each department.

3. Make sure you check off which Departments will be considered WIP. A WIP department for this process is typically one where a vehicle is in the shop or the parking lot.

4. Make sure you "map" each department to a Labor category under the *Labor Column.* This is extremely important so you can schedule by department. As you can see in the above screen shot we have "mapped" *Teardown*, *Body*, and *Reassembly* to *Body Labor*. This means Body labor will be scheduled into each of those "departments" during the scheduling or rescheduling process.

5. **VERY IMPORTANT**. Determine the daily capacity in hours for each department that has a labor category associated with it. Once you have determined the percentage for each department enter the % in the *S% column.*

Calculation example: Lets say your shop has five (5) body technicians and they all *Tear Down*, *Repair*, and *Reassemble*. In this case we know that we have 48 hours of TOTAL body labor capacity based on 5 techs X 8 hours per day X 120% efficiency.

Now that we know we have a total of 48 body hours per day we need to calculate the "breakdown" between *Teardown*, *Repair*, and *Disassembly*. In the screen shot above, we have calculated that 25% of all body hours on any repair should be applied to Teardown, 55% to Repair and the remainder to Reassembly.

6. Once you have "mapped" your departments and entered the appropriate number in the S% column the next step is to determine if any department without labor hours needs Administrative Day time. Summit allows you to enter in Administrative Day time per department such as Sublet, QC, and others. You can create a "blueprint" for every vehicle and "schedule" that vehicle through a complete repair process. If you feel a department needs an Administrative Day simply put a 1 under the Admin Days Column.

7. Once you have completed the steps above you will need to enable Business Rule #79.

Using The Overall and Department Scheduling

Once you have set up the Administration Module you can begin utilizing Summit's Overall AND Department capacity based scheduling.

1. Convert an estimate to an RO – as seen in Utilizing Capacity Based Scheduling

2. After you complete the Scheduled In and Overall Target Delivery Date click *Next* and Summit's RPM begins to work!

As soon as you click *Next,* the RPM™ departmental blueprint and schedule screen appears. RPM is smart enough to ONLY schedule the vehicle through *Departments* that have *Labor* and *Administrative* days associated with them. Here is an explanation for each Column:

- **Department**: The listing of your shops 14 customizable departments.
- **Reg:** The department the vehicle is scheduled to move through.
- **Hrs**: The # of hours scheduled in to that department based on the S% number in the Administration Module.
- **Lbr:** Labor type associated with department.
- **Scheduled In:** Date vehicle is scheduled INTO that department
- **Scheduled Out:** Date vehicle is scheduled OUT of that department
- **Max:** Maximum # of hours a department can accept for THAT specific Day.
- **WIP Hours:** # of actual WIP hours in Department as of right NOW.
- **Units:** # of vehicles in specific department right now.

Note: Please be aware that the last department "Out" date may not match the automated Target Delivery Date generated by Summit's Automated Scheduled In and Out Dates based on Shop Capacity, Available Technicians, and Touch Time. This is due to the fact that RPM™ looks at each department as well as Admin Days.

It is our recommendation that RPM be utilized as an "internal" scheduling system that is used to help you under-promise and over-deliver when it comes to on-time deliveries.

Summit's RPM also provides you with the ability to change the In or Out date in any department. If you change an In or Out date, RPM will automatically change all other dates that are scheduled AFTER the changed date. For example, in the screen shot below we are changing the Body Department "Out" date from 6/1 to 5/31. With this change, the "Out" date for the Refinish Department has changed to 6/9 from 6/10.

Once the Repair Order has been created we now have an *Open RO* with *Scheduled In* and *Scheduled Out* Dates.

In the Open RO View RPM also provides you with a *Schedule Icon.* This icon allows you to review and change the Blueprint / Schedule for an individual Repair Order or Review and Print Daily Schedules for All Departments OR any individual Departments.

5. To review and print the individual Blueprint / Schedule for a specific RO, click on the *Schedule Icon*, then click on *RO Schedule.*

This will re-launch your Departmental Schedule screen for the RO.

6. Once you click on *RO Schedule*, the Department Schedule for that specific Repair Order appears. A **Blue √** indicates that this vehicle has already moved through those departments. If you see **Red #'s** in the WIP Hrs column, that is an indication that you have exceeded the Max # of hours for that department.

Department:	Req:	Hrs:	Lbr:	Sched In:	Sched Out:	Max:	WIP Hrs	Units
SCHEDULED IN:	☑	0.0	N/A	6/11/2010	6/14/2010	0	0.0	0
VEHICLE HERE:	☐	0.0	N/A			0	0.0	0
PRE WASH:	☑	0.0	N/A	6/14/2010	6/15/2010	0	0.0	0
DAMAGE ANALYSIS:	☑	0.0	N/A	6/15/2010	6/15/2010	0	0.0	0
REPAIR PLAN:	☑	0.0	N/A	6/15/2010	6/16/2010	0	0.0	0
DISPATCH/PARTS HOLD:	☑	0.0	N/A	6/16/2010	6/17/2010	0	0.0	0
BODY:	☐	0.0	N/A			0	0.0	0
PAINT:	☐	0.0	N/A			0	0.0	0
REASSEMBLY:	☐	0.0	N/A			0	0.0	0
QC/MECH/SUBLET:	☐	0.0	N/A			0	0.0	0
QC/FILE AUDIT:	☐	0.0	N/A			0	0.0	0
FINAL DETAIL:	☑	0.0	N/A	6/17/2010	6/18/2010	0	0.0	0
VEHICLE READY:	☐	0.0	N/A			0	0.0	0
DELIVERED:	☐	0.0	N/A			0	0.0	0

Save   Cancel   Print

7. If you select the *Print Icon* on the bottom right you can print, fax, or e-mail an *RO Blueprint Report*

Once you click on *Overall Schedule* you have a few options on how you can view and/or print your shop's departmental schedule.

Your 1st option is to select All Departments or any individual department.

To print, click on the **Print Icon**.

To begin the schedule calculation click on the **Green Circle**.

Your 2nd option is to select the date in which you would like to see vehicles scheduled into and out all or particular departments.

8. After selecting Departments, a Date, and the Green Circle, you can view and/or print the Department Schedule for that Day.

Automated Warnings/Communications Based on Late Vehicles

One of Summit's key differentiators is its integrated communications system. In Summit RPM we have integrated a proactive communications system designed to help you repair more vehicle every day as well as increase your on-time deliveries dramatically. To take advantage of this powerful system you will need to: log into the Administration Module, Company Tab, Business Rules, Interoffice Mail.

Summit RPM will send automated warnings to CSR's, Production Managers, General Managers, and Estimators if a vehicle missed its In Date OR Out Date for any RPM department.

1. To enable this feature: select Business Rules 81, 82, 83, or 84. Summit will automatically communicate a late vehicle. This will help you proactively make adjustments to your work flow to meet critical delivery dates

Scheduling Report Options

Summit offers dozens of reports to help you with all aspects of Appointments and Scheduling.

Here is a list and view of the reports:

Vehicle Arrival Schedule

Vehicle Delivery Schedule

Click the print button in the 701-Scheduled Out tab to print the:

- Vehicle Delivery Schedule
- Scheduled Out Report

Appointments

Click the print button in the 702-Appointments tab to print the:

- Appointment List
- Appointment Worksheet

Reports

Scheduled In Report

Reports Scheduled Out Report

Dispatching

Delivering the "Right" Repair to the "Right" Technician at the "Right" Time for the "Right" Profit.

Rrepairing vehicles is where collision repairers make their $$$. All of Summit's solutions offer collision repairers with many different options to repair vehicles Better, Faster, and More Profitably.
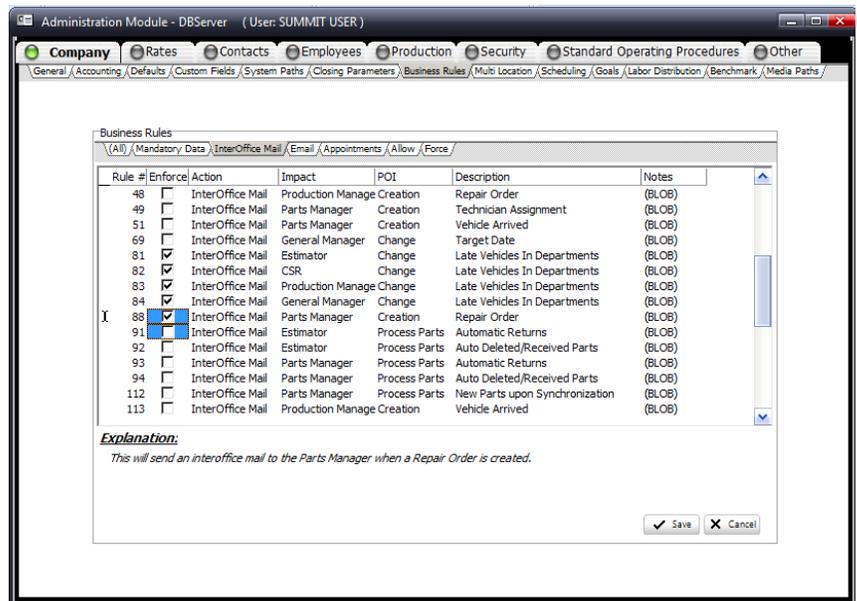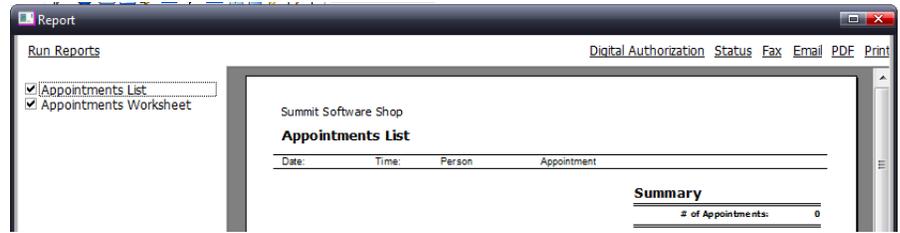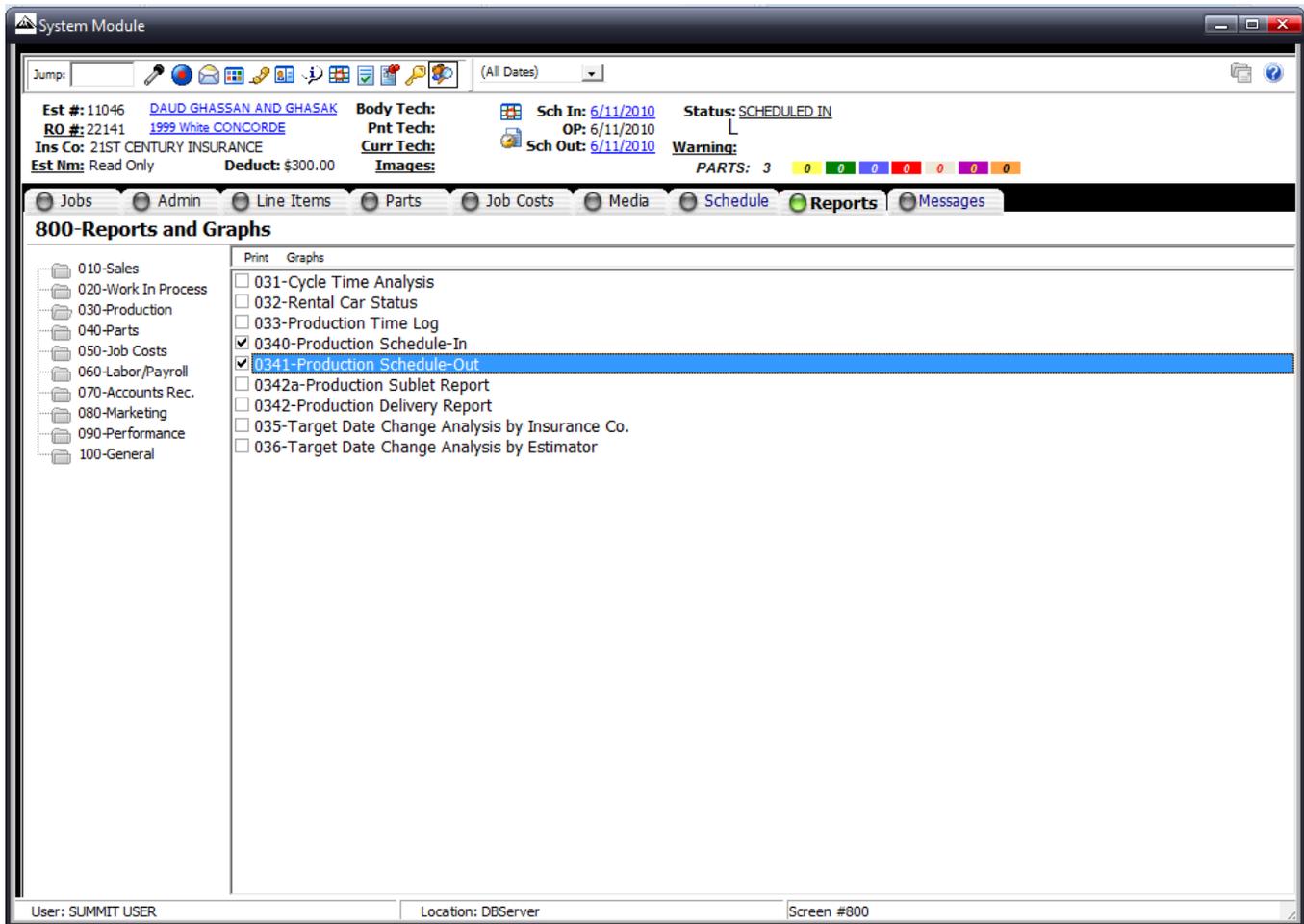
This section will cover several different Dispatching Options Summit offers.

Setting Up the Dispatching System

1. To begin Dispatching work to technicians the first things we must do is enter in all of our technicians or Teams into the Summit Administration Module. Log into the *Administration Module, Employees, Technicians, Admin.*

The keys to success in setting up your technicians are to enter in as much information as possible. Key areas related to dispatching are:

Pay Type: Hourly, Salary, Flat Rate, Commission. This will determine how and how much techs will be paid.

Skill Level: 1-10: The levels are tied to Repair Classifications and are utilized during the dispatching process.

TC password (Time Clock Password): If you utilize TechCentral you are going to want to enter in a numeric password.

Efficiency %: Is the goal for the technician.

Default Department: This is the department where the technician will spend most of his/her time.

Categorize: Select Technician

Team: If this technician belongs to a Team, enter the team name here.

2. Once you have entered in all your technicians you will need to make several company and process decisions, which will lead to the customization of Summit's Business Rules.

- Pay Type?
- Auto Flagging or Manual Flagging?
- Individual or Teams
- Department or Line Item Dispatching?
- Do you assign individual RO Lines to Individual technicians?
- Have you separated Disassembly from Body and Reassembly?
- Are you Blueprinting? Using Triage?
- Do you want technicians involved in the dispatching process?

3. Log into the *Administration Module, Business Rules,* and the *Allow Tab.* The following "Allow" Business Rules affect the Dispatching Functions in Summit: 29, 30, 35, 42, 43, 45, 50, and 76. You can determine which Rules apply to your processes by clicking on the Rule and reading the explanation at the bottom of the screen.

4. Other *Business Rules* that affect technician dispatching, located under the Force Tab, are: 68, 72, 73, and 87.

Using The Dispatching System

Delivering the "Right" Repair to the "Right" Technician at the "Right" Time for the "Right" Profit

Viewing/Printing Technician Workload

The first step in the dispatching process is knowing what the workload of each technician is every morning. To accomplish this in Summit:

1. Select Open RO's Tab.
2. Production View
3. Print Icon
4. Put a check in the Technician RO List Box
5. Click Run Reports.

This report will create an individual report for each technician, as well as a list of all RO's that have NOT been assigned as of the time you printed the report.

Another way to view your technician's workload is to:

1. "Right click" the _Curr Tech_ link in the _Customer Information Bar._
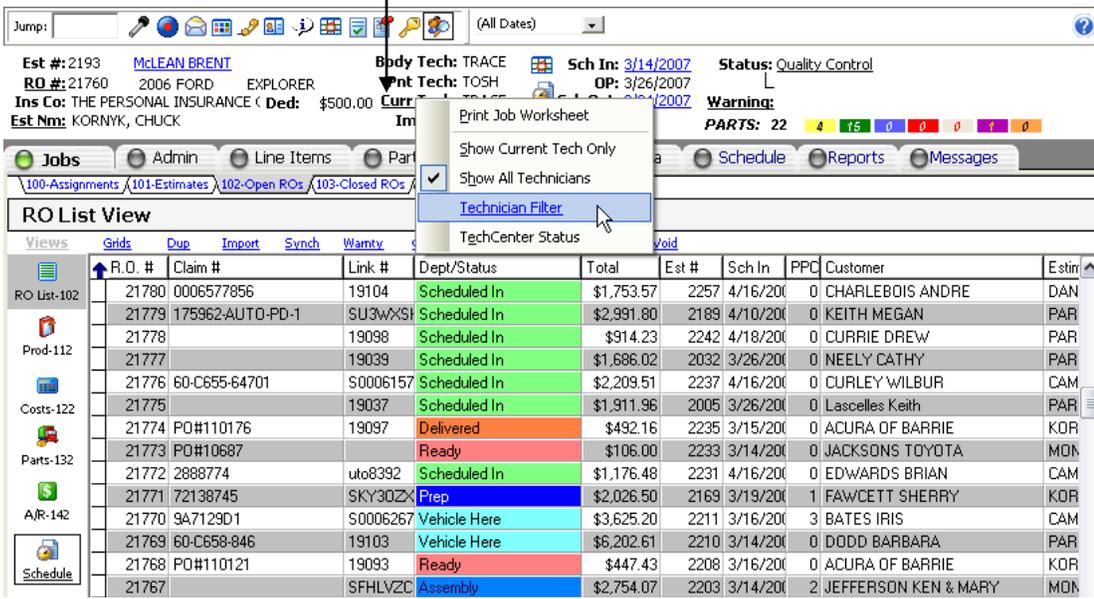
2. Select _Technician Filter_

3. Double click on a technician and you can view the # of Jobs and hours already assigned to him.

Behind the Technician Filter dialog box, Summit presents ONLY the RO's assigned to that technician or team. This will allow you to _Set Filter_ and then View and Sort only those RO's in any other Summit View.

When the Current Tech is **GREEN** in the Open RO's list, the screen is filtered.

To clear the filters: Right click" on the _Curr Tech_ link. Select the _Clear Filters_ tab.
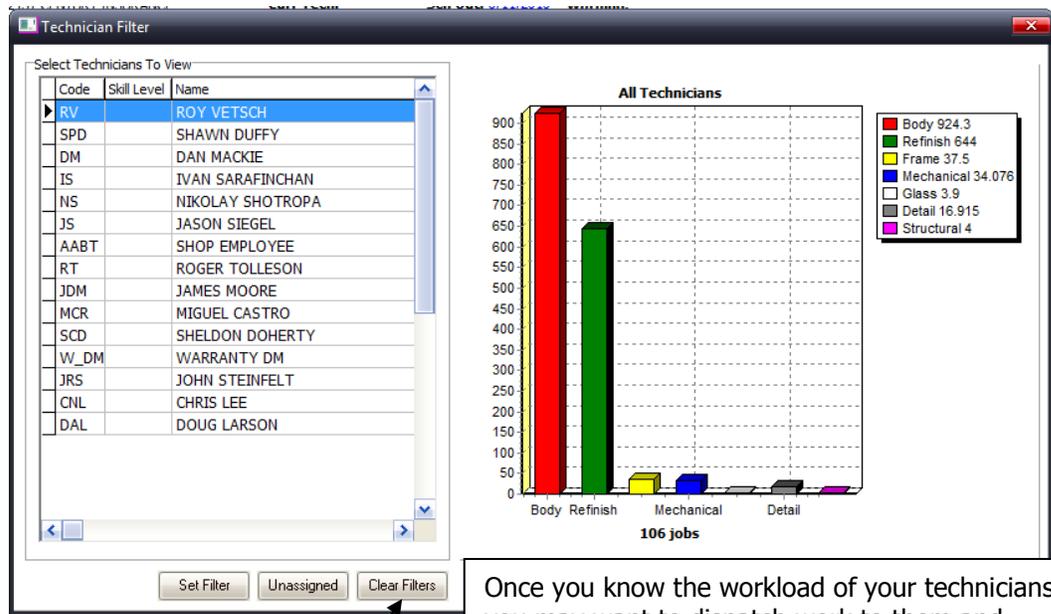
Once you know the workload of your technicians, you may want to dispatch work to them and provide them with a Work order that has all the details necessary to complete a quality repair on-time and within your shop's profit guidelines.

Summit offers several different options when it comes to the actual process of dispatching and assigning labor to your technicians.

Dispatching/Assigning Assigning Labor

RO View Assigning

To assign labor within the RO View:

1. "Right click" on the Open RO

2. Select Assign Labor and Summit presents all the labor departments. Departments with a Blue Circle have hours and NEED to be assigned, Departments with a **Green Circle** have ALREADY been assigned, while Departments with a **Red Circle** have NO hours and DO NOT NEED to be assigned.
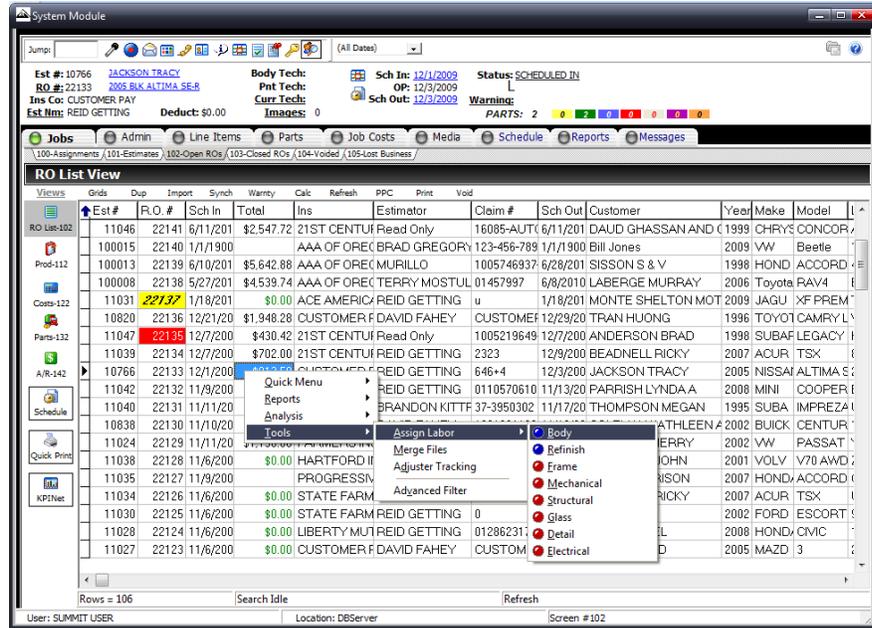
Production View Assigning

To assign labor within the Production View:

1. "Click" on the "color coded" labor departments below the Vehicle Row. Departments with a **Blue Letter** have hours and NEED to be assigned, Departments with a **Green Letter** have ALREADY been assigned, while Departments with a **Black Letter** have NO hours and DO NOT NEED to be assigned.
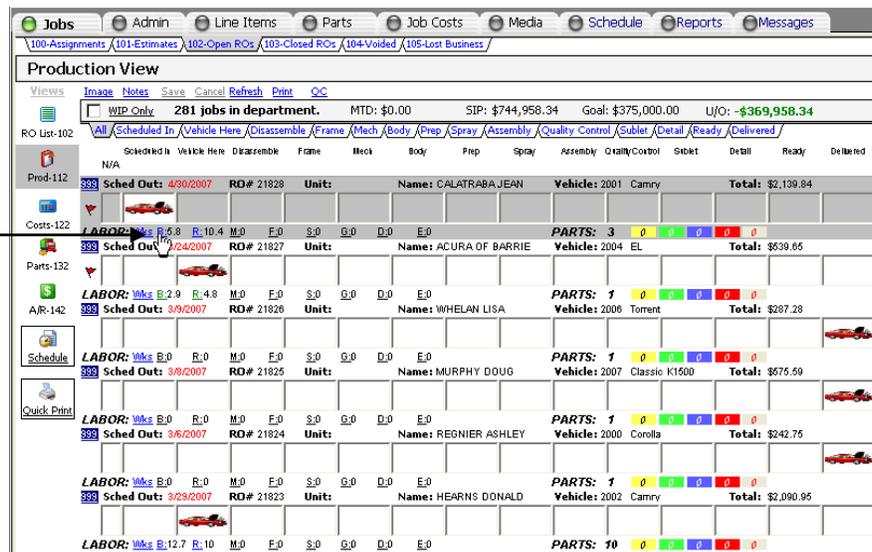
No matter what View you select to Dispatch/Assign labor the next step is the exact same. Upon selecting a department to assign the Labor Allocation dialog box appears. To begin "dispatching" labor to a technician or a team:

1. "Click" on the "drop down" arrow and the list of techs/teams appears.

2. If you want to dispatch all of the hours in a particular department to a single tech/team, select them from the list.

NOTE: Once you select the tech/team, you have a few other choices. If you want the tech/team Code/initials next to every line on the Work order, be sure to select "Apply to Line Items."

If you are "re-dispatching" and want to fill in open line select "Fill In." If you want to replace all previous line assignments select "Replace."
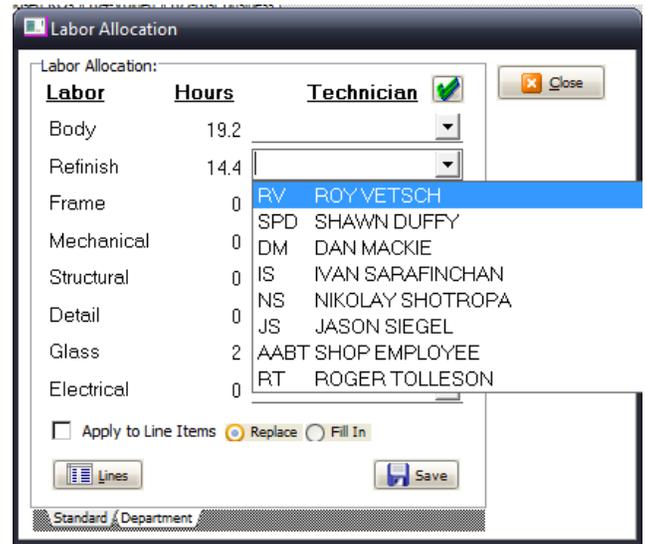
Determining Appropriate Skill Levels for Each Repair

For help determining which technician or team has the appropriate skill level to perform the selected repairs:

1. Click on the **Green √** and Summit will recommend which techs/teams are appropriate for this repair. Please remember that the Skill Level is directly related to the Repair Classification on the RO.
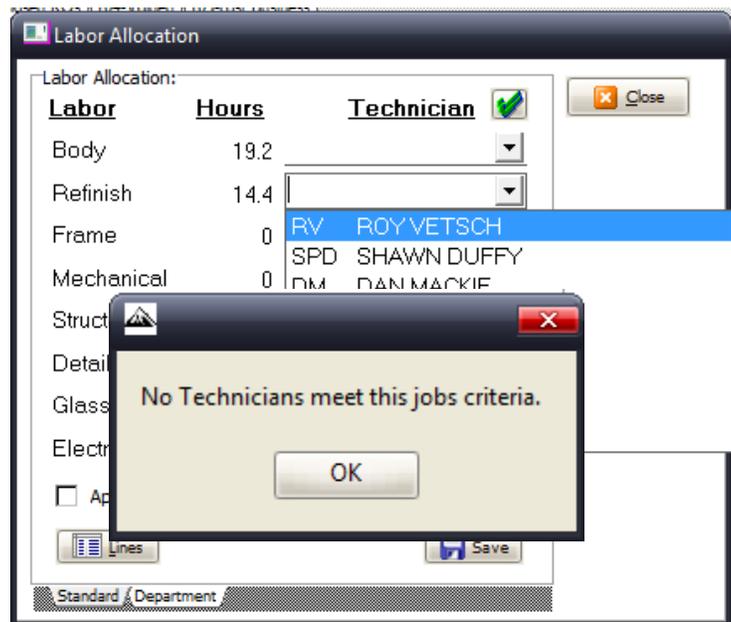
Dispatching Line Items to Individuals or Teams

In many shops managers like the idea of dispatching/assigning specific line items to specific techs or teams. Summit offers an easy to use, efficient way to accomplish this.

1. To dispatch/assign individual line items to techs or teams, you will follow many of the previous steps EXCEPT when you want to assign the labor select the *Lines* box.

2. The other option would be to assign the entire department to a single tech/team and then select the Lines box to re-assign specific lines.
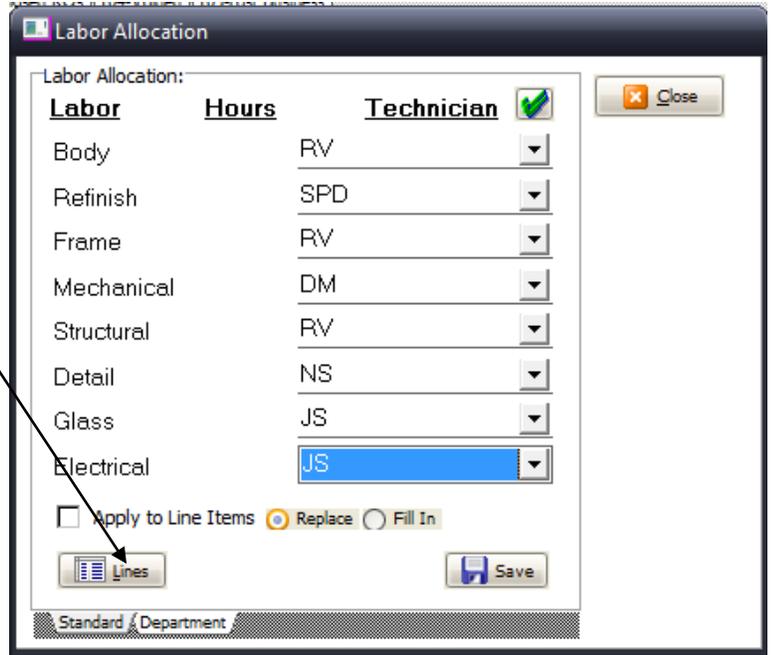
3. Once you "click" on the Lines Box the *Allocate Line Items* dialog box appears. Please be aware that you can sort any column by clicking on the column header. For example, let's say you wanted to assign the *R&I,* simply click on the *LbrOp Column*, locate *R&I,* and assign. (See screenshot below)
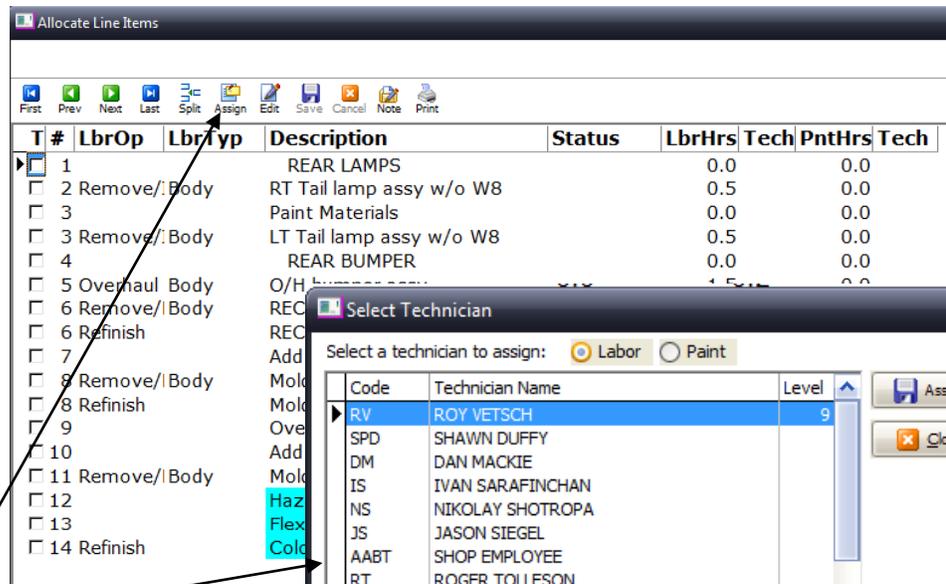
You can then click in the Assign link and a pop-up box will allow you to assign labor.
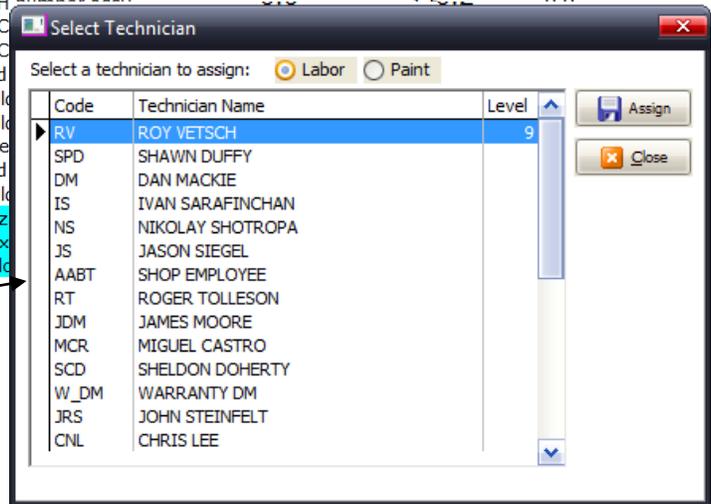
Splitting Line Items between Individuals or Teams

If you want to "split" a single line between multiple techs or teams, Summit provides you with an easy, efficient way to accomplish this.

1. Once the department has been assigned "click" on Lines and the *Allocate Line* Items dialog box appears. Please be aware that you can sort any column by clicking on the column header.

2. When you enter the *Allocate Line* Items dialog box, locate the Line Item you would like to split, "Tag" the line and select the *Split Icon*.

By selecting the *Spilt Icon,* Summit prompts you to decide how many times you would like to split the line.

3. Once you select the "Split" option Summit splits the line by the number you selected. The original line is highlighted in maroon so you know which line has been split. The next step is to select the tech/team with whom you would like to split the line with.

Producing Repairs Better, Faster, and More Profitably

Production control

In this section we will go over several different Production Management and Control Options Summit offers.

Setting Up The Production Management and Control System

To begin improving our Production Management and Controls with Summit, we need to determine how "deep" we want to go. Summit offers dozens of Production Management and Control capabilities. You have to determine which are "right" for your business.

Some of the questions you will need to answer are….

- Do I really need to improve my production management and control processes?
- What areas need improving?
- Am I committed to making changes in my production processes?
- Do my technicians "run" the shop or do I?
- How much time do we spend on payroll processes daily, weekly?
- Do I already have set repair tracking processes in place? If so, am I willing to change to improve?
- What are the steps vehicles go through in my repair process?
- What information do I, and the rest of my shop, need to increase shop productivity and efficiencies?
- Who in my shop is responsible for "controlling" the production processes?
- Who else, if anyone, should be involved?
- Do I want to reduce payroll processing time?

Once you have answered those questions, the next step is setting up your Summit Software to help you meet and exceed your goals and objectives! To set up your Summit Software:

1. Log into the Administration Module.
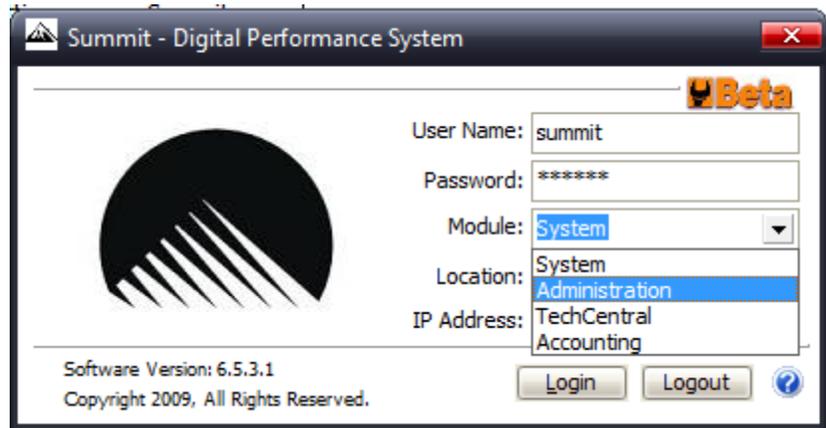
2. If you would like for your technicians to view and add images from TechCentral, log in to the Media tab and "click" on the check box next to *TechCentral Imaging.*

3. If you would like to see actual images of vehicles in The Production View of Summit, log in to the Defaults tab and check the box next to *Use Actual Vehicle Image in Production* .

Business Rules

The next step is setting up *Summit's Business Rules.* These will help you implement process controls and software features that will aid in repairing more vehicles Better, Faster, and More Profitably. There are now 100 Business Rules that you can implement, so this section is **Very** important!

Mandatory Data

The first section of the Business Rules, specific to Production Management and Control improvement, is Mandatory Data. By setting up the "right" Mandatory Dates you will get accurate cycle time reporting. To set up your Mandatory Dates, click on Business Rules,

Mandatory Data, and then make your selections from *Rule #'s 55 through 65.* By making these dates Mandatory the RO CANNOT be closed unless all the dates are completed!
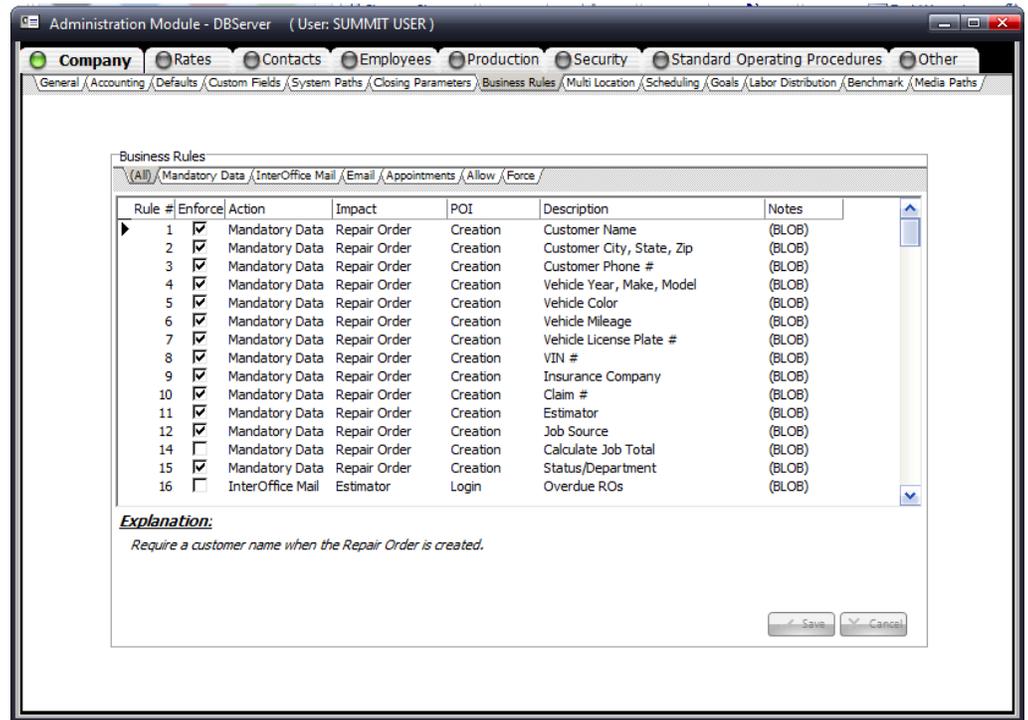
Interoffice Mail

Other Business Rules we would suggest as part of improving your Production Management Controls and Communications are in the *InterOffice Mail* Rules. All of these rules are designed to dramatically improve communications and production decisions based on how you want your shop to operate. NOTE: We strongly suggest you start small and build. If you turn on all the Rules, your employees will probably get "swamped" with dozens of e-mails and ultimately ignore them.

Email

If you want to automate your target date change communications to customers, insurers and rental car companies simply "Enforce" the Rule 20, 1, 22 and 67 and Summit will send an automated e-mail informing them that the target date for a specific RO has changed.

Allow

If you want to get your technicians involved in the Production Management and Control process, the Allow Tab in Business Rules offers you more than nine(9) different control points. Rules # 29, 30, 40, 42, 43, 45, 50, 76, and 79 are all VERY important to improving your Production Management and Control processes

Force

The "Force" Rules Tab is the last Business Rules section. It offers a few key rules that can help you improve your Production Management and Control. They are Rule #'s 68, 73,and 87

Labor Distributions

If you are an hourly pay shop and you want to set goals for your technicians and have them print in the Work order, you are going to want to utilize Summit Labor Distributions Option.

1. Select the *Labor Distributions Tab* under the *Company Tab* in the *Administration Module*.

2. Click on *Activate Distributions.*

3. Enter a percentage and selecting 'Activate Distribution' will reduce labor hours printed on the Job Worksheet printouts by the percentage specified. If you choose 10%, 90% of the hours from the estimate/RO are going to appear on the technician work order.
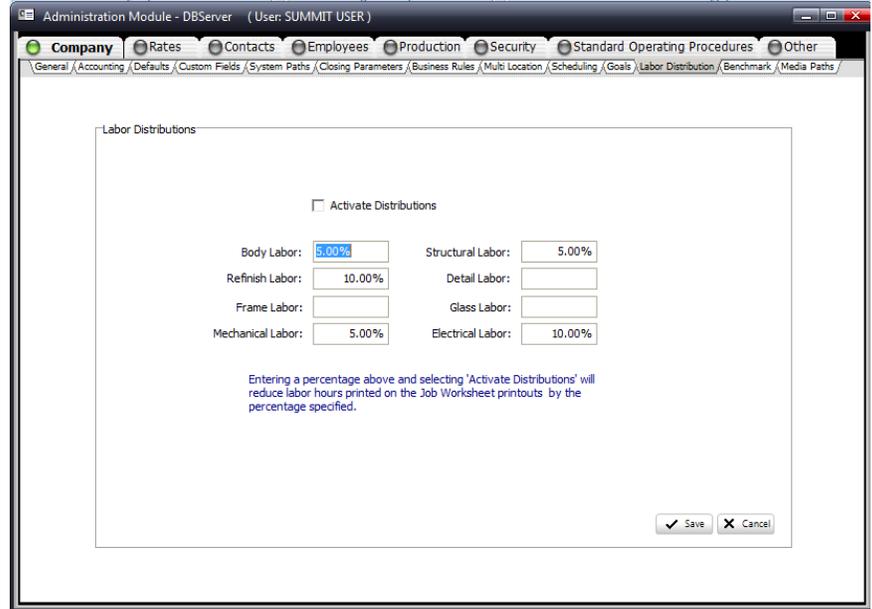
Summit Benchmark Tab

In all Summit products we offer each owner an area where they can set up numbers to measure your production performance:

Select the *Benchmark Tab* (under the *Company Tab* in the *Administration Module*). Plug in numbers on the Shop data tab and click the "Apply Data" button" and watch it work.

Since we discussed the Contact and Employee Tabs in the previous section we WILL NOT spend any time on them here. Just remember that these 2 sections are also important to improving you Production Management and Controls.
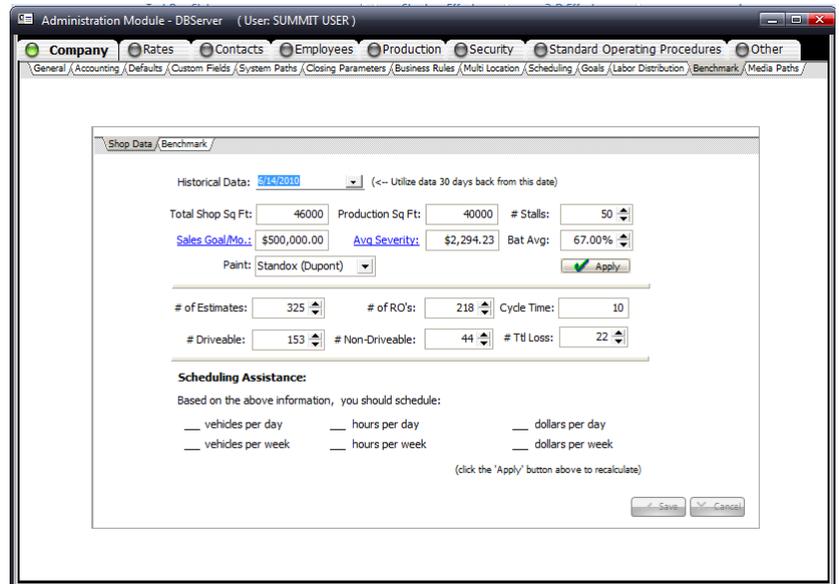
Production

The next area we want to set up is the *Production Tab.* This is going to be the area that has the most impact on improving your Production Management and Controls. Below is a description of each *Column* under the Departments Tab.

Department: This is the area where you are going to enter in up to 14 different steps/departments you want to track through the production process.

WIP: This control point will allow you to filter views and reports by WIP ONLY or ALL RO's. This can be important for tracking and reporting purposes. Our definition of WIP is that the vehicle is in the shop OR on the lot.

Trigger: By enabling the Trigger next to a Department you are telling the system that you want to enable the Summit Auto-Flag Payroll option for that department.

Update: This column is a drop down and provides you with a selection of several production management dates. By selecting one for a specific department that date will be automatically populated upon a vehicle being "moved" into that department.

Labor: This column allows you to "map" labor hours and pay to specific departments. In the example below we have "mapped" Teardown, Body, and Reassembly to Body Labor.

%: By entering a number in the % column next to a "filled in" Labor Column and you have enabled the Trigger column, you will automatically flag that % of labor when a vehicle moves OUT of that department.

Max Hrs: The maximum # of hours that department can produce per day.

S%: The % of hours you want to automatically schedule into that Department via Summit's RPM scheduling system.

Admin Days: The # of Administrative Days it takes to get a vehicle through a production process.

C: Customer

R: Rental Car

I: Insurer

Confirm: Enabling this tells Summit to "pop up" a warning to ask if you **REALLY** want to send the automated e-mail.

Customer Msg: The automated e-mail you want to send the customer when the vehicle is "moved" into that department.

Ins. Msg: The automated e-mail you want to send the insurer when the vehicle is "moved" into that department.

Rental Msg: The automated e-mail you want to send the Rental Car Company when the vehicle is "moved" into that department

Summit Departmental QC and Process Control Checklists

In an attempt to help repairers implement quality, we have provided you with the ability to create department checklists. When implemented, the department checklists prevent a vehicle from being "moved" to the next Department unless someone clicks on each item indicating that the task was completed.

We covered the *Job Classifications Tab* in the Scheduling session, so it will not be discussed here.
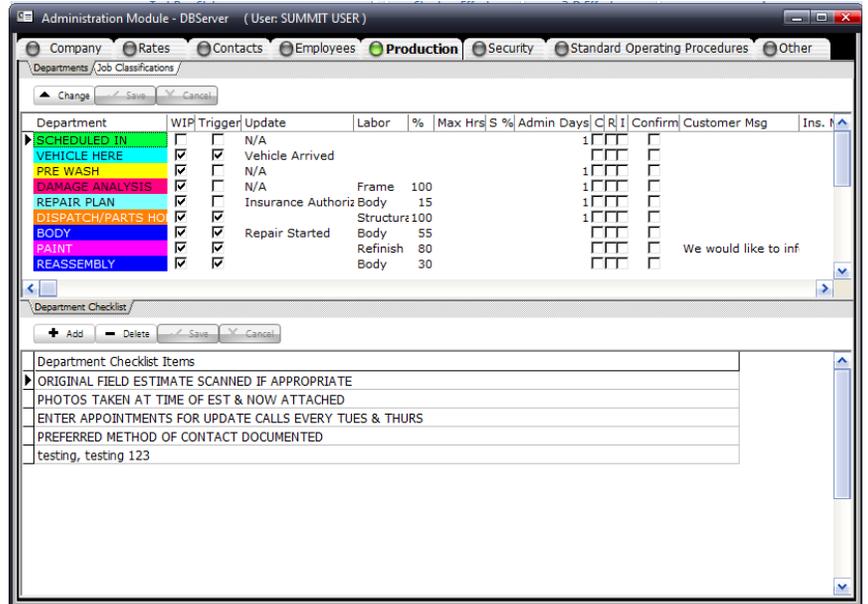
Using The Production Management and Control System

The first step in using your Summit Production Management and Control System is to understand how to "get around" the *Visual Production Screen*.

To utilize a specific image in the Production View:

1. Select the Media/600-Imaging Tab
2. "Right click" on the Image
3. Select *"Use in Production"*
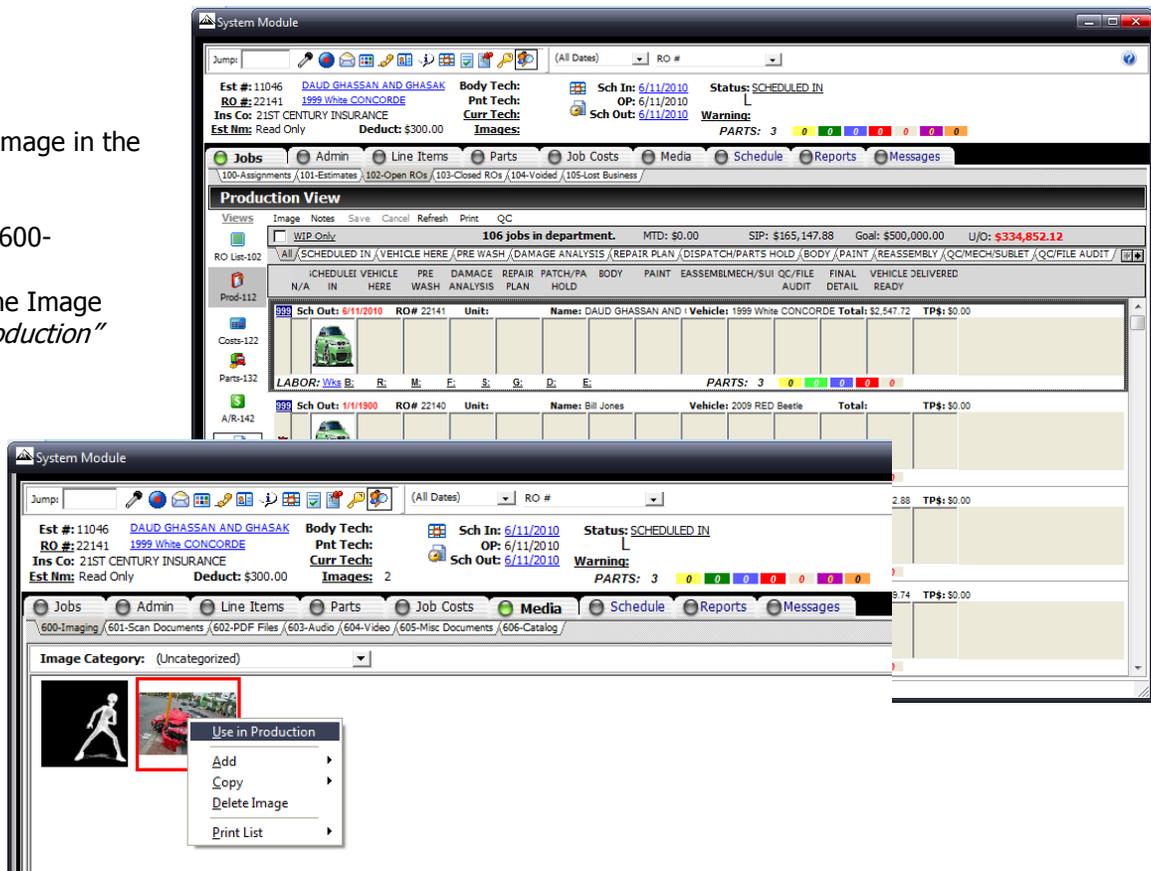
Production Screen Overview

Highlighted RO Information

Production View Control Bar

14 Customizable Departments

Highlighted Row

Production View Filter Options

Date Filtering
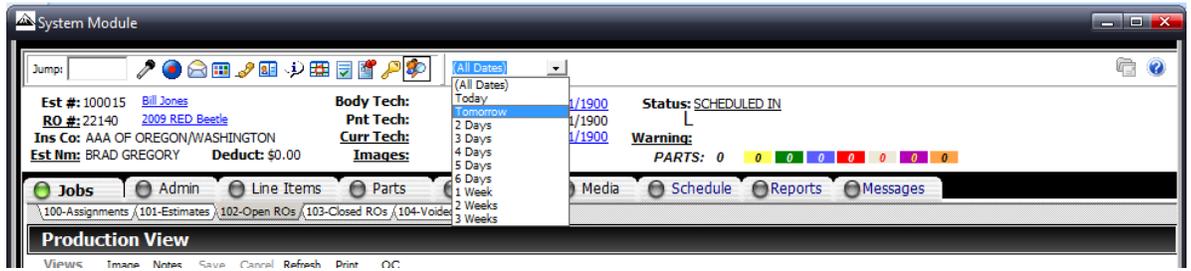
Department Filtering and Lists
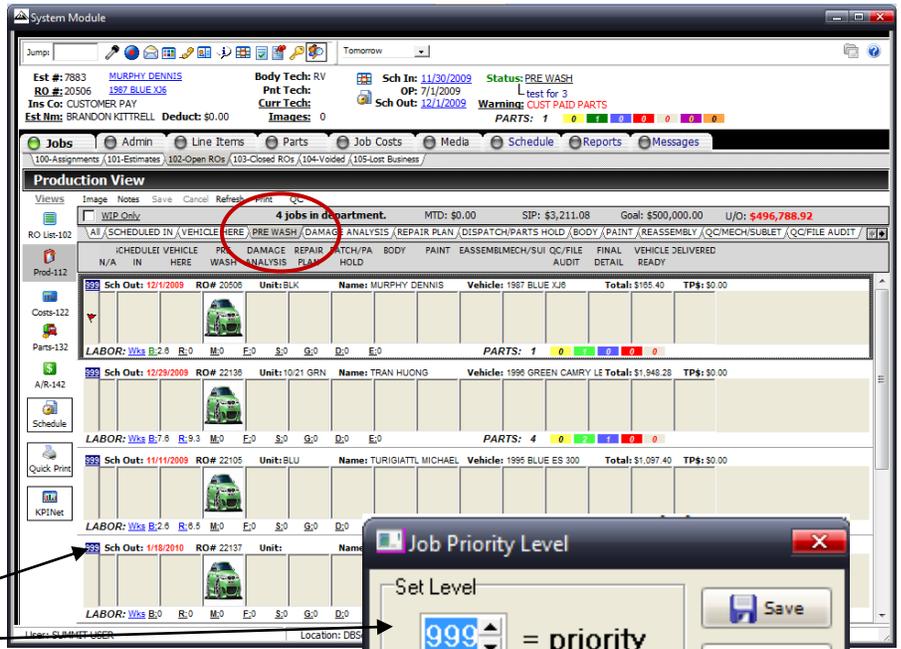
Prioritization Filtering

Integrated Quality

Setting up Quality Control Checklists in to the Administration/Production/Departments/Department Checklists integrates a quality process into every step of the repair process.

When you click on a vehicle in the Production View and drag to the next department, the checklist will have to be completed.

Auto Flagging

"Auto-Flag" Commission and Flat Rate payroll processes reduces administrative time, increases accuracy, and eliminates over-flagging.

Auto Assign

Summit's "Auto-Assign" Function will remind you to assign hours in a department if a) there are hours and b) if you have not assigned any.

Production Reports

By clicking on the "Print" button in the production screen, you can print the following reports:

- RO Roster (Std)
- RO Roster (Dbl)
- RO Roster (Flags)
- RO Roster (Groups)
- Production RO List (Std)
- Production RO List (Dbl)
- Technician RO List (Std)
- Technician RO List (Dbl)

Production Reports Tab
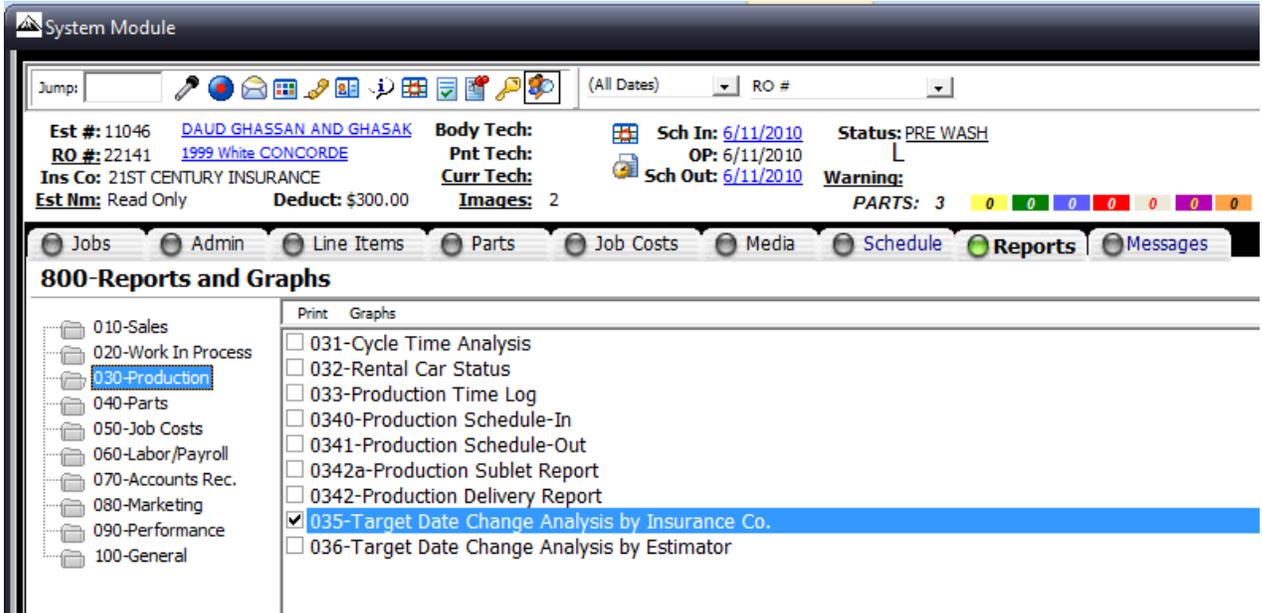
After selecting the report you want to produce, Summit's Reporting Engine provides you with dozens of options for creating Production Management and Control reports. Below you have the following choices:

- Date Range.
- Sort Order.
- All, Individual, and Combination of Insurers.
- All, Individual, and/or Combination of Repair Classifications.
- All, Individual, and/or Combination of Estimators.
- All, Individual, and/or Combination of CSR's.
- Export to CSV, Txt, Excel, XML, or HTML Formats.
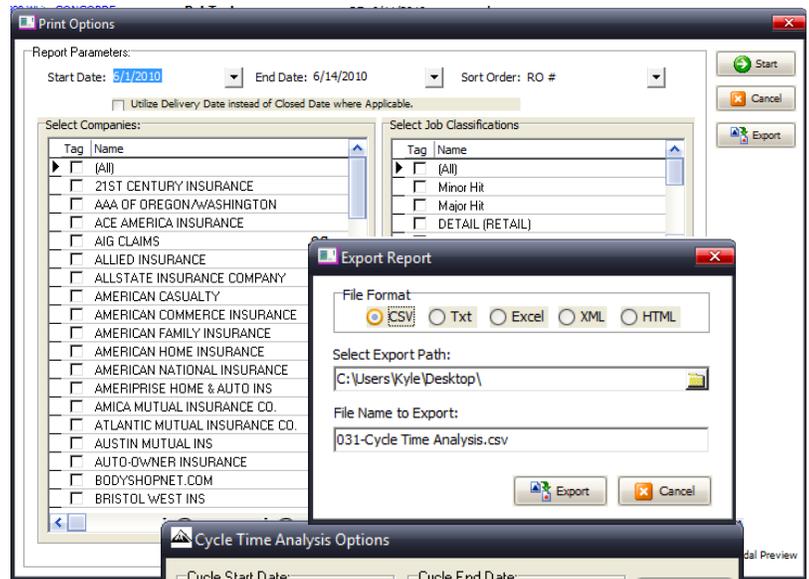
031-Cycle Time Analysis Report

Once you have selected your filter criteria, Summit's *Cycle Time Report* also allows you to select the Start and End Date measurements. You can also select the work schedule you want to include.

Other Production Reports

The other Production Reports you can print are:

032-Rental car Status
033-Production Time Log
0340-Production Schedule-In
0341-Production Schedule-Out
0342a-Production Sublet Report
0342-Production Delivery Report
035-Target Date Change Analysis by Insurance Co.
036- Target Date Change Analysis by Estimator

A detailed description of what each report prints can be seen in the Reports Guide.