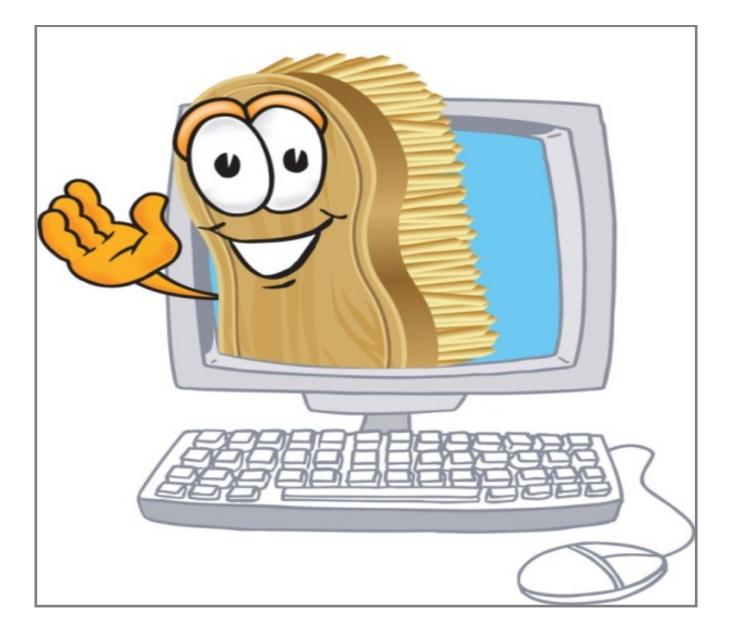




# **Instruction Manual**



EstimateScrubber.com is a VehicleOwnersGuide.com company

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# Introduction

# EstimateScrubber is freemium based.

The freemium version allows you a free, <u>no strings attached or credit card</u> <u>necessary</u>, 30 day trial access to all the available scrubber features. You may use our "Quick Scrub Profile" which scrubs against all rules or you may elect to set up multiple profiles and use all the features scrubber offers. The profiles are saved as you transition from the trial version to subscriber.

The trial version is offered at no cost for 30 days to allow you to see the value in our low cost subscription based scrubber. You may subscribe at any time.

If you elect not to subscribe the scrubber reverts to the free version of the scrubber and will continue to allow scrubbing against 10 pre-selected rules along with the ASA and SCRS Non-Included items.

The free version of EstimateScrubber does not use personalized profiles, require a log in or any other form of setup.

# "EstimateScrubber will not sell or share your information or estimates with any third party"

# **Section 1-Getting Started Overview**

#### www.estimatescrubber.com

Until you login to EstimateScrubber it will open in Freemium mode. You will only be able to scrub estimates against 10 of our 38 rules unless you register for our 30 day free trial.

# **EstimateScrubber Instruction Manual**

**Click the "EstimateScrubber Instruction Manual" on the note pad.** 

### Registration

#### Click on "Register" in the black menu bar

Filling out the registration form allows you to scrub estimates using all our scrubber features free for 30 days. Your login ID should be unique to your shop. At the end of the 30 day period scrubber will revert back to the freemium mode or you can sign up with one of our easy payment plans. **Enhanced Security:** During the registration policy you will be asked to enter another security code. This should only be known to an administrator and gives access to listing parts and creating reports. *For detailed instructions go to page 9* 

# Login

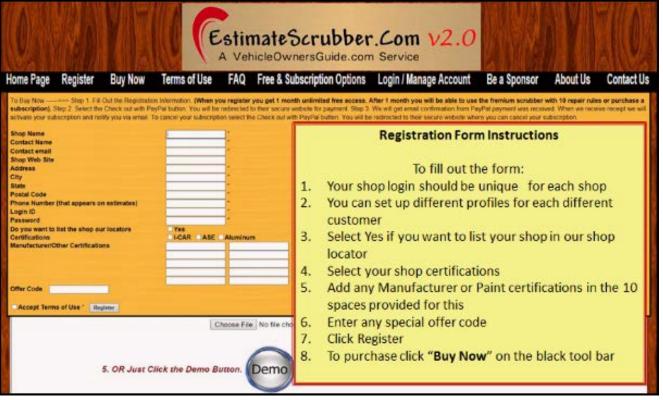
 When you register, login is automatic on the computer you used. You need to login for the first time on all other machines in the shop you will use to scrub estimates. Once you have logged in the computer will remember the login. To login a new machine or personalize your computer click "Manage Account" in the black menu bar, enter your ID and Password, accept the terms and click the "Manage Account" button. To personalize the computers see "Personalizing the Workstation" For detailed instructions go to page 9

Login is not required again unless you want to edit your list parts or view reports.

### **Profiles**

Profiles allow you to tailor EstimateScrubber for a specific Insurer or task. When you login a "Quick Start Profile" is automatically created for you. You may modify this profile or create or clone new profiles, set a different default profile, edit, delete or print a profile. To personalize your profiles click "Manage Account" on the black menu bar, enter your ID and Password, accept the terms and click the "Manage Account" button. This will take you to the "Shop Information" page from there click "Personalize Profiles" on the black tool bar and select what you want to do. <u>For detailed instructions go to page 17</u>

# **Section 2-Registration**



00000000

### When you register you are automatically logged into that computer.

- 1. Your registration ID is good for all computers in one shop location and they will work simultaneously.
- 2. After the initial registration you must login, using "Login / Manage Account", to all other computers in the shop that may be used to scrub estimates.
  - 1. At this point you may want to read "Section 3-Personalize Workstations" and add estimator's names for your computers (see Login page 10).
  - 2. Once you login the computer will remember you and you should not have to login again.
- 1. After you have added the estimators names, to track usage, you must set the correct name to the workstation
  - a. Open the dropdown window under the coffee cup
  - b. Select the name associated with that workstation
  - c. Click set (do this before selecting an estimate to scrub)
    - i. The name will be permanently attached to the workstation until changed
  - d. Any estimates scrubbed will be recorded under that name until changed

# Section 2-Registration (cont.)

# **Create your ID**

You can create your own ID or you can click the "Create Login ID" button on the registration screen. You then need to enter a password. It is recommended that you record the ID and password somewhere. You may later change the password but not the ID using the "**Shop Information**" link in the black tool bar.

# **Enhanced Security Code**

During the registration process you will be asked to enter an enhanced security code. This code allows you to control access to protected sections of EstimateScrubber. It allows an owner or designated personnel the ability to list and edit parts for sale in our Collision Parts Source app and also to see and create reports. <u>Please record the code for future use.</u> (See pg. 9)

The security code should only be given to authorized personnel.

# **Registration/Login**

You may scrub estimates on as many work stations as necessary in one shop. You must login to each workstation using the ID and Password used to register with. Once you have logged in to a workstation you will remain logged in. It is not necessary to login again (to scrub estimates) on that machine. You may personalize each work station with an estimator's name. Each estimate scrubbed will then be recorded under that estimator.

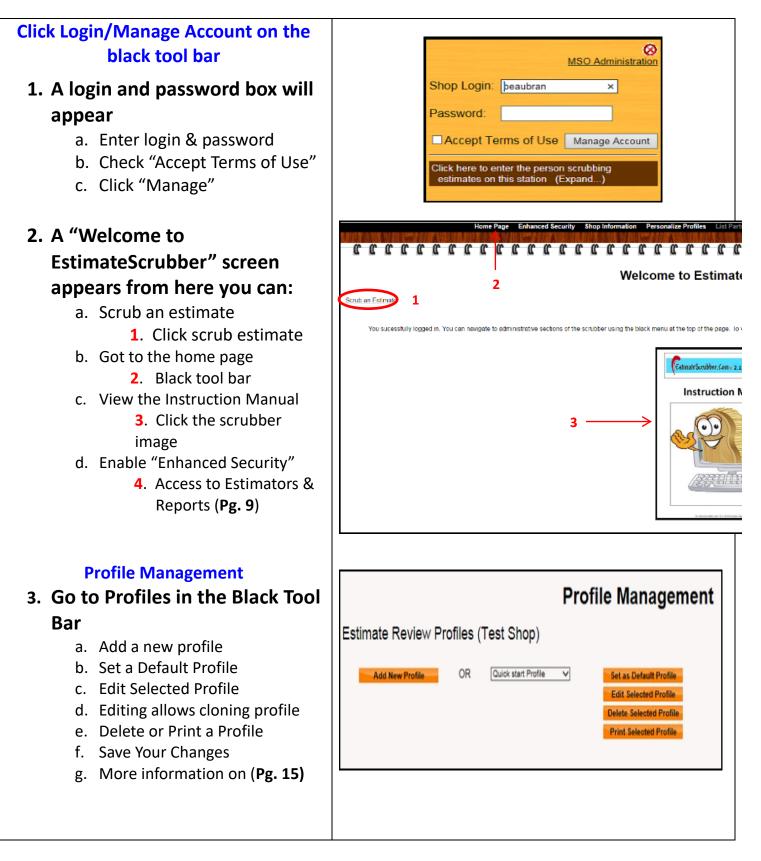
# **Contact Us and Reporting Scrubber Issues**

"**Contact Us**" is found in the black tool bar on the home page. It can be used for general questions or suggestions.

"**Report Scrubbing Issues**" Is found on the Scrub Results Page and is used to report issues or problems with the results or performance of scrubber. Please fill out as much detail as you can. A copy of the estimate is automatically attached to the email.

### We check these emails daily and will respond ASAP.

# Section 3– Login (cont.)



# Section 4- Enhanced Security (cont.)



During the registration process you will be asked to enter an enhanced security code. This code allows you to control access to protected sections of EstimateScrubber. It allows the owner or designated personnel the ability to list, edit, and delete parts for sale in our Collision Parts Source app and also to add estimators, read "Supplier Messages" and create reports. Please record the Enhanced Security Code for future use.

The security code should only be given to authorized personnel.

### 1. To open Enhanced Security

- a. Login
  - i. Accept terms
  - ii. A Welcome screen opens
- b. Click Enhanced Security from the Black Tool Bar
  - i. An Enhanced Security login screen opens
    - 1. Enter your security code
      - a. Note: once a code is created the only way it can be changed is by contacting EstimateScrubber
- c. After entering your security code you will be allowed access to:
  - i. Reports
  - ii. Collision Parts Source setup
    - 1. You may List, Edit and Delete surplus parts for sale
  - iii. Estimators
    - 1. You may add and/or delete names
- d. If you need to change your Enhanced Security Code Contact EstimateScrubber through the Contact Us link

# **Personalize Workstations**

After you register you may add the names of all personnel that will be scrubbing estimates. If an estimate is scrubbed and no estimator is selected the computer has not been personalized. When a usage report is run, the report will show all estimates as an "Unidentified User"

#### To add the names after registration

- a. When you click "Register or select Login/Manage Account" you will be taken to a welcome page
- b. Go to the black tool bar at the top and select estimators
  - i. If you elected to use enhanced security you will need to enter that code you enable the estimators link



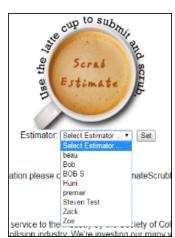
### Section 4- Personalize Workstations (cont.)

- c. Click on estimators and an estimator scrubber user screen will open
  - i. From this screen you should add the names of the personnel who will scrub estimates
    - 1. Click "Add Person"
    - 2. To delete a name Click the "Delete" button
    - 3. If you do not personalize, all scrubber estimates will be identified on reports as an Unidentified User
  - ii. Return to the Home Page
    - 1. There is an estimator dropdown directly under the Coffee cup
      - a. To switch Estimators prior to performing a scrub, click the drop down arrow, select the correct name then click "**Set**"
        - i. All estimates scrubbed will be recorded under that name for reporting purposes
        - ii. If an estimate is scrubbed and no estimator selected when a report is run, the reports will show as an Unidentified User
- d. To update, add or delete names click "Login/Manage Account"
- e. Follow Step 1 above

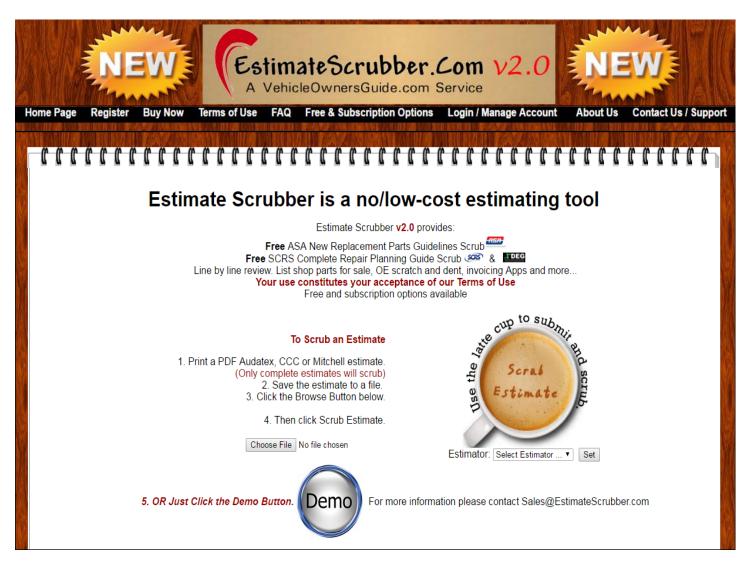


### Setting Estimator Name on Workstation

- 1. After you have added the estimators names you may set the correct name to the workstation
  - a. Open the dropdown window under the coffee cup
    - i. Select the name associated with that workstation
    - ii. Click set (do this before selecting an estimate to scrub)
      - 1. The name will be permanently attached to the workstation until changed
  - b. Any estimates scrubbed will be recorded under that name until changed



# Section 5-Home Page



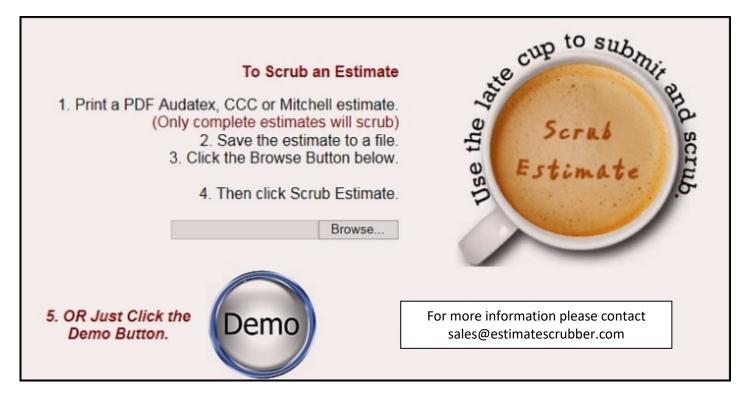
### Menu Bar Functions (Black Bar)

- Home Page
- Register
- Buy Now
- View Terms of Use
- View FAQ's (Frequently Asked Questions)
- Free & Subscription Options
- Manage Account/Profiles/Reports (pages 9, 15, 19)
- Be a Sponsor
- About Us
- Contact Us/Support

# Section 5-Home Page (cont.)

#### Selecting an Estimate to Scrub from Home Page

- 1. Go to #3 (browse Button) on the scrubber home page
- 2. Click the browse button
- 3. A "Choose file to upload" screen appears
- 4. Select the file location
- 5. Select file
- 6. Click on coffee cup to scrub file
- 7. Scrub results and estimate will appear



# To Demo EstimateScrubber

- 1. Click the Demo Button
  - a. "Select the Estimate to be scrubbed" a window will open.
    - i. You will see Audatex, CCC and Mitchell estimates to choose from
    - ii. Click on an estimate to be scrubbed
- 2. Click review
- 3. Scrub results and estimate will appear
  - a. You can select ScrubberApps to demo

# **Section 6-Review Results**

When you scrub an estimate the review results will be contained inside eight (8) accordion folders. The folders, as displayed below, are labeled with the contents contained in them. The numbers of flags are displayed as opportunities contained in each folder. The first folder contains the complete scrub results. The others are broken into smaller categories of the results for easier reading comprehension. You may click through the categories at will. If you click the printer friendly link you may print the results.

Select Profile: Quik Start Profile   Revi	ew
2011 Honda Accord Reviewed Against Profile: Quik Star Printer Friendly Review Results Printer Friendly Profile	
All Flagged Items (34 Opportunities)	8
ASA, SCRS Not Included Items (2 Opportunities)	8
Body, Parts & Labor Operations Flags (19 Opportunities)	8
Refinish Operations Flags (5 Opportunities)	8
Position Statements (3 Opportunities)	8
Profile Flags (5 Opportunities)	8
CPS & Links to Alternate Suppliers	8
Consumer Estimate	8
	rt these advertisers keep our prices low

#### The contents contained in the folders are outlined on the next pages

\$crubberMax was developed to help quantify the results of using EstimateScrubber. When you scrub an estimate the single estimates bottom line total will automatically populate the single estimate total (first line) along with the body labor rate. We have populated the average RO field with an approximation dollar amount. You may enter your own numbers into any of the bolded fields,. When calculated it will show the monthly and annual shop sales for the number of RO's completed per year along with the impact of adding extra labor and materials. This will show the amount of profit you may be missing by not charging for work you are currently doing. Remember this amount drops right to the bottom line as you are already doing it to complete the job.

# Section- 6 \$crubberMax (cont.)

\$crubberMax is displayed behind the estimate. To view it click on the blue \$crubber Max bar above the estimate. To return to thre estimate click the bar again. The estimates total and labor rate will be automatically populated. There is an approximate average shop RO amount pre-populated this can be changed to your own shops RO \$ amount, you can also change the average # of monthly RO's your shop completes. Click the blue Cale ROI Clear All button to calculate the effect of what you enter and see the single estimate change and how muck it adds over the course of a month or year. Use Clear all to erase what you entered. This will not change the averager RO\$ you entered.

- Estimate # 29							
		1/2			Ċ	± '	•
				Date: Estimate ID: Estimate Version: Preliminary Profile ID:	10/25/2014 10:3 29 0 * Mitchell	27 AM	
This tests a/c rech	arge, R&I fuel	tank, airba	gs				- 10
Damage Assessed By: MITCHELL I Classification: None	MITCHELL						- 88
Type of Loss: Collision Deductible: UNKNOWN							- 88
Insured: 10-25 Test 1 a/c rech	n, R&I fuel tk, airbg						- 88
	Mitchell Serv	ice: 911468					- 10
REAR WINDOW DEF TELESCOPIC STEEF ALUMALLOY WHEE TINTED GLASS, AUT VARIABLE ASSISTE AUTOMATIC HEADL INTERIOR AUTOMATIC STEEHOR AUTOMATIC FRONT SEATS WITH LIMITED SLIP DIFFE	G, DRIVER AIRBAG, PO 'OGGER, CRUISE CONT ING GOLUMN, ANTH-LO ILS, REMOTE IGANTION, TO AIR CONDITION, THIF D STEERING, SIDE AIRB IGHTS, SECOND ROW S TIC DAYNIGHT OR ELEC N AIRBAGS, HEATED ST LITY CONTROL, FRONT POWER LUMBAR SUP REMTIAL, POWER DISC AUDIO CONTROLS, SUN	WER DRIVER SEAT, F ROL, TILT STEERING CK BRAKE SYS., THA NAVIGATION SYSTEP • COMPUTER, UNIVER IAGS, ANTI-THEFT SY IDE AIRBAG CTROCHROMATIC MII EERING WHEEL, DA' HEATED SEATS • ORT, INTERIOR AIR BRAKES, POWER LI	COLUMN, LEATHER ACTION CONTROL, F M, AUXILIARY INPUT RSAL GARAGE DOO STEM RROR YTIME RUNNING LIG FILTER, KEYLESS E FIGATEVTRUNK	e ER WINDOW R SEAT FOG LIGHTS FOR OPENER			
Enter Single Estimate total			\$0.00	Enter estir	nate total		
New Estimate Total	5	0.00		New estimation	ate bottom lin	e	
		Hour to each	\$0.00		int of labor & estimate. Go	to the gre	y section
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The effect of adding Materials & Labor This section shows the effect \$2458.33 (Average Industry RO) or enter your own RO amount Number of RO's per month Estimated Monthly Gross sales \$ Estimated Annual Gross sales \$ Enter your lowest shop estimate Labor Rate Additional Paint & Materials Additional Corrosion Protection, seam sealers, etc. Clips and attachments Total Material Adds Enter additional Labor Hours Additional material and labor revenue this RO only Additional yearly profit New estimated annual gross sales Scrubber Cost @ \$25.00 Month Additional Profit Monthly Return On \$300 Investment	of adding r of adding r 0.00 0.00 0.00 50.00 1 r 12 r \$300.00 y	nissed labor over \$0.00	a period \$2458.33 Estimated 1 \$2,458.33 \$29,499.96 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	and add an necessary) of time Enter Aver Enter Aver Enter Aver Annual Gro Labor rate Enter Add Enter Add Enter Clip Total Mat1. Enter com amount Totals add' Shows Mor Shows Mor Shows Anr Cost of pro Add'I mont	age RO \$\$ an aber of RO's   ales before ad oss before ad for calculati itional P&M 'I Corr Protect s and Attach Adds bined add he adds bined add he atthly \$\$ effect nual \$\$ effect nual \$\$ effect	mount per mont ds ds ds on ct, seam s ment Am- ours & sh aterials (If t on labor on labor a t on gross on gross a cost)	h sealers, o ount tows \$\$ any) adds sales sales sales

# **Section 6-Scrubber Results Page**

Scrubber Hom	e Page Review Another Estimate Choose File No file chosen Review
Select Profile: Quik Start	Profile Review
Printer Friendly Review Res	ved Against Profile: Quik Start Profile ults Printer Friendly Profile Report Scrubbing Issue
All Flagged Items (15 Opportunit	
ASA, SCRS Not Included Items	
Body, Parts & Labor Operations	
	<u>Test Result</u> This estimate has been compared to Collision Advices' recommended sales mix guidelines to help you to achieve overall maximum gross profit.
COLLISIONADVICE Explain the 30/20/10	1. Body/Frame/Mech Labor guideline is $30.0\% \pm 1.5\%$ , the actual % is $34.64\%$ 2. Refinish Labor guideline is $20.0\% \pm 1.0\%$ , the actual % is $24.71\%$ 3. Parts guideline is $38.0\% \pm 1.9\%$ , the actual % is $31.75\%$ 4. Refinish Materials guideline is $10.0\% \pm 0.5\%$ , the actual % is $12.85\%$
Block Sand Outer Panels or remove sound deadening materials	Block Sand, specific outer panels were repaired on line/s 11. 1. Do you need to add block, feather & fill labor to the panel/s? 2. Should you add labor to remove sound deadening from repaired panels?
Estimate Line Modified (CCC only)	Estimate line/s 11 modified. 1. The part type, part number, price, labor or labor type has been changed by estimator. 2. Changes are identified on the estimate through the use of an <u>underscore.</u>
Labor Hours, blank or zero	There was a zero or no labor on line/s 6.
R&I Emblems, Mouldings, Nameplate, clean & retape	<ul> <li>R&amp;I of mouldings, emblems and nameplates on line/s 19.</li> <li>1. Do you need to allow for cleaning old adhesive from the moulding and retaping?</li> <li>2. Do you need to allow for cleaning old adhesive from a repaired or blended panel?</li> </ul>
Refinish Operations Flags (3 Op	portunities)
Position Statements (3 Opportu	nities) 🔀
Profile Flags (3 Opportunities)	≫
CPS & Links to Alternate Suppli	
Consumer Estimate	×

### **Results Page Functions:**

- 1. You may scroll
  - a. Through scrub results
  - b. Through the estimate
- 2. Review the profile used to scrub
- 3. Change the profile used to scrub
- 4. View "Printer Friendly Profile"
- 5. Print "Printer Friendly Profile"
- 6. View "Printer Friendly Review Results"
- 7. Print "Printer Friendly Review Results"
- 8. Report Scrubbing Issues

# Section 6-Scrubber Results Page (Cont.)

### Menu Bar

- 1. Home Page returns you to home
- 2. Click Review Another Estimate
- 3. Click the browse button
- 4. "Choose file to upload" appears
  - a. Select the file location
  - b. Select file
  - c. Click Review
  - d. Scrub results and estimate will appear

Select Profile: Quik Start	Profile Review					
2015 HOND ACCORD Reviewed Against Profile: Quik Start Profile Printer Friendly Review Results Printer Friendly Profile Report Scrubbing Issue						
All Flagged Rems (15 Opportunities)						
ASA, SCRS Not included items	(1 Opportunities) 😒					
Body, Parts & Labor Operations	Flags (5 Opportunities)					
Item	Test Result					
	This estimate has been compared to Collision Advices' recommended sales mix guidelines to help you to achieve overall maximum gross profit.					
COLLISIONADVICE Explain the 30/20/10	<ol> <li>Body/Frame/Mech Labor guideline is 30.0% ± 1.3%, the actual % is 34.04%</li> <li>Refinish Labor guideline is 20.0% ± 1.0%, the actual % is 31.25%</li> <li>Parts guideline is 38.0% ±1.0%, the actual % is 31.25%</li> <li>Refinish Attentials guideline is 10.0% ±0.5%, the actual % is 12.85%</li> </ol>					
Block Sand Outer Panels or remove sound deadening materials	Block Sand, specific outer panels were repaired on line/s 11. 1. Do you need to add block, feather & fill labor to the panel/s? 2. Should you add labor to remove sound deadening from repaired panels?					
Estimate Line Modified (CCC only)	Estimate line/s 11 modified.  1. The part type, part number, price, labor or labor type has been changed by estimator.  2. Changes are identified on the estimate through the use of an <u>underscore</u> .					
Labor Hours, blank or zero	There was a zero or no labor on line/s 6.					
R&I Emblems, Mouldings, Nameplate, clean & retape	R&I of mouldings, emblems and nameplates on line/s 19. 1. Do you need to allow for cleaning old adhesive from the moulding and retaping? 2. Do you need to allow for cleaning old adhesive from a repaired or blended painet?					
Refinish Operations Flags (3 Op	• • • • • • • •					
Position Statements (3 Opportu						
Profile Flags (3 Opportunities)	se de la companya de					
CPS & Links to Alternate Supplie	· · · · · · · · · · · · · · · · · · ·					
Consumer Estimate	Sector and the sector					

# DEG & Procedure Page Functions (Gold Box left side) 1. View Info providers reference guides

- a. Audatex
- b. CCC
- c. Mitchell
- d. DEG inquires on vehicle being scrubbed
- e. DEG link to report database issue
- f. Estimating Tips m(from the DEG)

#### The above links always offer direct access to the most current information courtesy of the DEG

**Note:** some of the review results contain links offering additional information. These links are underlined and when clicked on offer additional information and/or short video segments to further explain the review results.

# **Section 7-Profiles**

When you register a "Quick Start Profile" is created and set as the default profile. This profile will scrub estimates against scrubbers set of 38 rules (shown on page 17). It does not check any other areas. Using "Personalize Profiles" found in the Login/Manage Account link on the Home Page's black tool bar you can personalize this profile. You may edit an existing profile or clone a new profile. You can create separate profiles to scrub specific items. Other profiles could be setup to address specific rates, rules and thresholds for DRP's or insurers. There is no limit to the number of profiles you can create.

EstimateScrubber is very versatile allowing you to scrub the same estimate against as many different profiles as you need to. To change the profile being used to scrub, go to "**Select Profile**" box in the yellow band on the results page, select a different profile and click **Review.** 

### Set & Check Administrative Data

Admin data will be flagged if selected and not found in estimate

VIN	Year	Make
Exterior Color	Trim Code	Odometer
License Plate	Production Date	Customer Name
Customer Address	Customer Phone	Customer Email
Insurer	Policy Number	Deductible
Type of Loss	Job/RO	Damage Indicator
Date of Loss	Claim Number	Estimated By
Scheduled In Date	Inspection Date	Estimated Repair Days

Set & Check Rates Rate will be flagged if over or under the profile rate						
	Body \$	Paint \$	Paint Supplies \$			
	Frame \$	Electrical \$	Mechanical \$			
	Diagnostic \$	Structural \$	Glass \$			
Body Supplies \$ Sales Tax						

# Section 7-Profiles (cont.)

### **Miscellaneous Search Repair Operations**

Profile Section 3.a Miscellaneous Repair Search Operation: This section allows you to select text to be "Required on Estimate" or "Not Allowed on Estimate". Depending on which option has been selected EstimateScrubber looks for line text in the estimate and <u>flags missing text</u> or <u>flags text not allowed</u> on the estimate.

There are 10 of these search fields.

✓ Search 1	Enter Verbiage Audatex, CCC, and Mitchell here or create your	
	Verbiage:	

Note: The Verbiage must be identical to estimate printout verbiage. You can enter verbiage from all 3 info providers the text must be separated with a "PIPE Symbol" ( | ).

### **Miscellaneous Custom Repair Operations**

Profile **Section 3b**. Miscellaneous Repair Custom Operation: This section offers the ability to enter estimate text verbiage along with a dollar amount and/or labor hours. If the estimate amount is over or under the specified profile amount the line will be flagged.

### There are 10 of these custom fields.

☑ Custom Item 1	Restore Corrosion		\$15.00	]
	Protection Corrosion		0.5	hrs
Verbiage:	Protection	Y		J

### Section 7-Profiles (cont.)



### **Scrub Rules**

Rule Looks For	Rule Looks For	Rule Looks For
Aim, sensors (park, backup, proximity & camera)	Discontinued Parts	Part Number, Call Dealer
A/C Evacuate & Recharge	Estimate Line Modified (CCC only)	Part Price/Labor Allowance, Manually Entered Inc*
Advanced Substrates, repair	Fuel Tank/Fuel Pump Module, R&I/R&R	Parts Price/Sublet Amount, blank or zero
Air Bag, deployment clean up	Glass, Urethane Set	R&I Emblems, Mouldings, Nameplate, clean & retape
Asterisks, overridden refinish and/or blend allowances	Labels	Refinish Check, part number, ending in PTM, ZZ & bumper reinforcements/impact bars
Battery, disconnect	Labor Hours, blank or zero	Refinish Setup, Underside, Second Color & Two Tone
Block Sand, repaired outer panels	Labor Notes - Message Codes	Refinish, undersides of selected panels
Bumper, refinished on vehicle (CCC only)	Mechanical Operations Paid as Body (CCC / Mitchell only)	Remanufactured Parts, core charges
Collision Advice, Sales Mix Rule	Open Item (CCC Only)	Unibody/Frame, setup, pull
Corrosion Protection, restore	Paint Materials NEW Check #1, <u>Has no amount in Scrubber</u> <u>Profile</u> , calculates effective materials rate	Used Part, preparation
Decals, Overlays, Stripe Tape	Paint Materials Check #2, <u>Has amount in Scrubber Profile,</u> calculates the true material amount;	Weld damage, blend/repair selected panels

### NOTE: for a complete list of rules refer to the Quik Start Profile Pg.xx

NOTE: The Collision Advice Sales Mix rule is calculated by dividing the estimates subtotal (before tax) by the operations total dollars and converted into percentages. The target percentages are: 36-38% Parts, 30% labor (including body frame and mechanical), Refinish 20% and Refinish Materials 10%. This has been proven to provide the most profitable sales mix for collision estimating

# Section 7-Profiles (cont.)



# Creating/Sharing profiles for Multi Shop Organizations (MSO's)

An MSO allows administering profiles all the shops from a single master login. To create a MSO it is necessary to contact EstimateScrubber's Customer Care Department using the "Contact Us" link in the scrubber application. Please list the administrators contact information and phone number. Our customer Care department will contact you to setup the MSO's ID and password along with the shops in the MSO group to receive the selected profiles.

# Managing the MSO Profiles

When a MSO is created it is not a shop and has no profiles attached to it. The profiles are created by shops in the MSO and shared with other shops in the MSO. The MSO only allows you to share the profiles with other shops in the MSO. It would be best if one shop in the MSO creates all the profiles and shares them with the other MSO shops. Shared profiles can be modified to suit the needs of the shops they are shared with.

- 1. Select & open "Login/Manage Account" on the black tool bar of the Home Page
  - a. Click on the link "MSO Administration"
    - i. A MSO Administrator Login page appears
    - ii. Enter the MSO,s login and password
      - 1. You may need to get the ID & PW from customer care
      - 2. Accept terms of use
  - b. A Select Shop page appears
    - i. Step 1 Select, from the dropdown, the shop name that contains the <u>profiles</u> to be shared
    - ii. Step 2 Click "Get Shop Profiles to Share" This displays the shops in the MSO
      - 1. Select the shops name that have the profiles to be shared (left side of screen"
    - iii. A Select Profiles to transfer screen appears
      - 1. **Step 1** should already be displaying the correct shops name with the profiles to be transferred
        - a. If the correct shop was selected in the prior screen ignore Steps 1 & 2
        - b. If multiple shops have profiles they can be selected from this screen and profiles shared See Steps 1 & 2
      - 2. Step 3 Select the profiles to be transferred (Left side of screen)
      - 3. Step 4 Select the shops to receive the profile (Right side of screen)
    - iv. Step 5 Select Copy Checked Profiles to Checked Shop/s (yellow button top of page)
      - 1. A message the selected profiles were shared is displayed
        - a. Note: if a shop is deleted out of an MSO the profile will remain intact
        - b. If the profile is changed by a shop the changes do not affect the other shops in the MSO



# **Estimator usage report**

If you personalized your estimator's computers you, as an administrator, can generate a report showing the amount of scrubbed estimates by estimator. To generate this report:

#### 1. Estimator Usage Report

- a. Usage reporting records the amount of estimates scrubbed
  - i. If you scrub the same estimate multiple times each scrub is recorded
- b. Shows the number of estimates scrubbed broken out by estimators for a selected period of time.
  - i. Each estimators work station should be personalized to effectively use this report
    - 1. If there is no estimator selected the scrub will be identified as an "Unidentified User" in the usage report

#### 1. To create the Usage Report

- a. Login through Login/Manage Account
  - i. The welcome to EstimateScrubber page is displayed
    - 1. Enter your enhanced ID (If necessary)
      - a. List Parts, Estimators & Reports becomes activated
  - i. Select "Estimator Usage Report"
    - a. Select the date ranges for the estimator report
    - b. Select Estimator usage report
  - ii. To print click "Printer Friendly Usage Report"
    - a. Right click on report to print

#### **Estimator Usage Report example**





### 30, 20, 10 Sales Mix Reports

The 30, 20, 10 rule was jointly developed and implemented by Steve Trapp from Axalta along with Mike Anderson from Collision Advice. The rule looks at your estimates and creates percentages for following four categories.

- 1. Parts 38% range (acceptable range is 36.1 to 40.9%)
- 2. Labor 30% (acceptable range is 28.5 to 31.5%)
- 3. Refinish Labor 20% (acceptable range is 18 to 22%)
- 4. **Refinish Mat**erial 10% (acceptable range is 9.5 to 10.5 %)

The above percentages have been found to create the most overall shop profitability on estimates.

EstimateScrubber's Sales Mix Report currently shows these Percentages as a default % on each individual scrub and reports on them over a selectable period of time. The 30,20,10 report will show the shop averages, vehicle make averages and each estimators average (must personalize work stations).

These percentages can be used as a guide to gauge the profitability of the estimates. We now allow a shop to adjust these percentages to meet shop needs and/or identify trends in estimating.

An example would be if the parts % was high and Labor % low you could check to see if anything can be repaired instead of replaced. If an estimate meets the above criteria this will be displayed in the scrub results



To generate data for this report you should have the "Collision Advantage 30, 20, 10" rule selected in the profile.

Below are examples of the sales mix report

#### Sales Mix Report Example

#### The black bar shows Total Shop Sales \$\$ the Average Estimate \$\$(\$ / by the Est Count) and the 30,20 10 %'s

30, 20, 10 Sales Mix							
Start 6/1/2016 End: 7/13/2016 Create Report Detail Estimate Information Printer Friendly Sales Mix Report							
			Shop Sales Mix				
Total Shop Sales in	dollars: \$231,540.	25 / Average Job sheet in do	llars: \$5,647.32 / {Body, Frame & Mechanical Labor: 27.38 dollars}	% / Refinish Labor: 12.45% / Pa	rts: 46.35% / Refinish Material	ls: 6.66% as an average against sale	
Estimate Range	Estimate Count	All in Range (Count/Percentage)	Body, Frame & Mechanical Labor in Range (Count/Percentage)	Refinish Labor in Range (Count/Percentage)	Parts in Range (Count/Percentage)	Refinish Materials in Range (Count/Percentage)	
ALL	41	0 (0.00%)	0 (0.00%)	17 (41.46%)	1 (2.44%)	0 (0.00%)	
\$0-\$2000	8	0 (0.00%)	0 (0.00%)	1 (12.50%)	0 (0.00%)	0 (0.00%)	
\$2001-\$4000	12	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)	
\$4001-\$6000	6	0 (0.00%)	0 (0.00%)	5 (83.33%)	0 (0.00%)	0 (0.00%)	
\$6001+	15	0 (0.00%)	0 (0.00%)	11 (73.33%)	1 (6.67%)	0 (0.00%)	
			Estimate Range shows: Estimate Court = estimates scrubbed broken into 5 ca All in Range = number/percentage of estimates in wh Labor/Parts in Range = number/percentage of estimates in	ich all 4 categories were met			
			Estimator Salas Niv				

### Personalize 30,20,10 % Ratios

To change Percentages: Click the Personalize Ratio button to change the percentages for the reports, change the % and click the Save button. To return to the default figures open the box and click Reset and then Save.

Body, Frame & Mechanical Labor Target Percent	30	%
Refinish Labor Target Percent	20	%
Parts Target Percent	38	%
Refinish Materials Target Percent	10	%
Save Reset		

#### Single Shop Estimator Sales Mix Report Example

		Start 60	I2016 End 69/2016 Create Report Detail Estim	nate Information Printer Friendly Sales I	Mix Report		
			Shop Sales Mix				
			Estimator Sales Mix				
Estimator: Bob /	Total Shop Written	n in dollars: \$35,007.77 / Average \$	Sale in dollars : \$5,834.63 / {Body, Frame & Mechanical Labor: 2	.92% / Refinish Labor: 13.56% / Parts:	49,78% / Refinish Materials: 7.20	% as an average against sales dollars}	
Estimate Range	Estimate Count	All in Range (Count/Percentage)	Body, Frame & Mechanical Labor in Range (Count/Percentage)	Refinish Labor in Range (Count/Percentage)	Parts in Range (Count/Percentage)	Refinish Materials in Range (Count/Percentage)	
\$2001-\$4000	3	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)	
\$6001+	3	0 (0.00%)	1 (33.33%)	0 (0.00%)	0 (0.00%)		
Estimator: BOB S /	Total Shop Writte	en in dollars: \$25,463.50 / Average	Sale in dollars : \$3,637.64 / (Body, Frame & Mechanical Labor:	32.84% / Refinish Labor: 20.38% / Parts	27.67% / Refinish Materials: 9.0	4% as an average against sales dollars	
Estimate Range	Estimate Count	All in Range (Count/Percentage)	Body, Frame & Mechanical Labor in Range (Count/Percentage)	Refinish Labor in Range (Count/Percentage)	Parts in Range (Count/Percentage)	Refinish Materials in Range (Count/Percentage)	
\$0-\$2000	1	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)	
\$2001-\$4000	4	1 (25.00%)	1 (25.00%)	1 (25.00%)	1 (25.00%)	1 (25.00%)	
\$4001-\$6000	1	0 (0.00%)	1 (100.00%)	1 (100.00%)	0 (0.00%)	0 (0.00%)	
\$6001+	1	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)	

#### Single Shop Make Sales Mix

			Make Sales Mix			
		Make: JEEP / {Body, Fram	e, & Mechanical Labor: 23.84% Refinish Labor: 10.95% / Parts:	56.42% Refinish Materials: 8.28% as an a	verage against sales dollars}	
Estimate Range	Estimate Count	All in Range (Count/Percentage)	Body, Frame & Mechanical Labor in Range (Count/Percentage)	Refinish Labor in Range (Count/Percentage)	Parts in Range (Count/Percentage)	Refinish Materials in Range (Count/Percentage)
\$6001+	1	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)
		Make: DODG / {Body, Fran	ne, & Mechanical Labor: 31.74% Refinish Labor: 13.77% / Parts	: 46.12% Refinish Materials: 4.38% as an a	verage against sales dollars}	
Estimate Range	Estimate Count	All in Range (Count/Percentage)	Body, Frame & Mechanical Labor in Range (Count/Percentage)	Refinish Labor in Range (Count/Percentage)	Parts in Range (Count/Percentage)	Refinish Materials in Range (Count/Percentage)
\$6001+	1	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)
		Make: FORD / {Body, Fran	ne, & Mechanical Labor: 35.06% Refinish Labor: 19.42% / Parts	33.60% Refinish Materials: 9.88% as an a	verage against sales dollars}	
Estimate Range	Estimate Count	All in Range (Count/Percentage)	Body, Frame & Mechanical Labor in Range (Count/Percentage)	Refinish Labor in Range (Count/Percentage)	Parts in Range (Count/Percentage)	Refinish Materials in Range (Count/Percentage)
\$0-\$2000	1	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)
\$2001-\$4000	3	1 (33.33%)	1 (33.33%)	1 (33.33%)	1 (33.33%)	1 (33.33%)
\$6001+	1	0 (0.00%)	1 (100.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)
		Make: HOND / {Body, Fram	ie, & Mechanical Labor: 31.48% Refinish Labor: 21.11% / Parts:	33.21% Refinish Materials: 12.71% as an a	average against sales dollars}	
Estimate Range	Estimate Count	All in Range (Count/Percentage)	Body, Frame & Mechanical Labor in Range (Count/Percentage)	Refinish Labor in Range (Count/Percentage)	Parts in Range (Count/Percentage)	Refinish Materials in Range (Count/Percentage)
\$2001-\$4000	1	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)
\$4001-\$6000	1	0 (0.00%)	1 (100.00%)	1 (100.00%)	0 (0.00%)	0 (0.00%)

#### **Single Shop Detail Estimate Information**

Delote Checked-Items		Start: [6/1/2016 ] End: [6/9			e Detail estin		ion for report
Date	Estimator	Vehicle	Total	Body, Frame, & Mechanical Labor	Refinish Labor	Parts	Refinish Materials
6/3/2016	Bob	2014 JEEP (8795)	\$11,527.24	23.84%	10.95%	56.42%	8.28%
6/3/2016	Bob	2005 DODG (6275)	\$7,991.18	31.74%	13.77%	46.12%	4.38%
6/6/2016	Bob	2007 FORD (2936)	\$7,278.84	30.49%	13.46%	49.80%	6.18%
6/3/2016	Bob	0 (8909)	\$2,272.64	41.63%	25.08%	20.52%	12.76%
6/3/2016	Bob	2013 AUDI (3752)	\$2,196.45	45.41%	27.25%	13.47%	13.86%
6/3/2016	Bob	2013 BMW (0239)	\$3,741.42	8.72%	6.29%	76.13%	4.58%
6/8/2016	BOB S	2009 FORD (9886)	\$2,740.68	39.22%	26.27%	14.60%	12.61%
6/8/2016	BOB S	2012 Honda (6455)	\$5,464.10	30.23%	19.68%	33.79%	12.65%

The black bar shows the scrub date, Estimator, Vehicle (last 4 of the VIN for ID purposes), gross estimate dollars (before Tax) and the 30,20,10 percentages. The Date, Estimator and Vehicle are sortable by clicking on the Heading. The information shown is always the last estimate scrubbed for that vehicle. **Example:** A supplement replaces the preliminary scrub values

Note: Unwanted estimate detail may be deleted by checking the estimate and clicking the "Delete Checked Item"

### Combined MSO 30, 20, 10 Sales Mix

The Combined MSO Report offers a unique view of the MSO's performance covering all the MSO shops estimating activity for an electable period of time

The black bar shows the MSO Combined Sales \$\$ the Average MSO Estimate \$\$ (\$ / by the Est Count) and the Combined MSO 30,20 10 percentages'

			30, 20, 10 Sales M	X		
		Start 61	D/2016 End: 7/15/2016 Create Report Detail Esti	mate Information Printer Friendly Sales I	Mix Report	
			MSO Sales Mix			
Total MSO S	ales in dollars: \$29	8,181.67 / Average Job sheet in c	tollars: \$5,963.63 / {Body, Frame & Mechanical Labor: 30.37%	/ Refinish Labor: 12.59% / Parts: 44.47	% / Refinish Materials: 7.07% as	an average against sales dollars}
Estimate Range	Estimate Count	All in Range (Count/Percentage)	Body, Frame & Mechanical Labor in Range (Count/Percentage)	Refinish Labor in Range (Count/Percentage)	Parts in Range (Count/Percentage)	Refinish Materials in Range (Count/Percentage)
ALL	50	3 (6.00%)	7 (14.00%)	6 (12.00%)	9 (18.00%)	6 (12.00%)
\$0-\$2000	11	0 (0.00%)	2 (18.18%)	0 (0.00%)	0 (0.00%)	1 (9.09%)
\$2001-\$4000	14	3 (21.43%)	5 (35.71%)	3 (21.43%)	3 (21.43%)	3 (21.43%)
\$4001-\$6000	6	0 (0.00%)	0 (0.00%)	2 (33.33%)	2 (33.33%)	2 (33.33%)
\$6001+	19	0 (0.00%)	0 (0.00%)	1 (5.26%)	4 (21.05%)	0 (0.00%)
			Estimate Court = estimate schubbe broken nich All in Range = number/percentage of estimate in LabonParts in Range = number/percentage of estimate	categories by total dollar amount which all 4 categories were met		
			Shops Sales Mix for MSC			
			Make Sales Mix for MSO			

Below the black bar the MSO is broken down into all scrubbed estimates and four categories by amount of the gross total (before tax). The report then offers the percentages for the 30,20,10 sales mix. This is displayed in the following manner: count/percentage The count is the number of estimates that hit the target 30,20 10%. The % shown is the % of estimates that hit the 30,20,10 targets.

#### **MSO Shop Sales Broken Out**

			30, 20,	0 Sales Mix		
I		Start: 6/10/2016 E	ind: 6/11/2016 Create Report	Detail Estimate Information	Printer Friendly Sales Mix R	eport
			MSO	Sales Mix		
			Shop	a Sales Mix		
Shop: Beau	/ Total Shop	Written in dollars: \$2,165.1	4 / Average Sale in dollars : \$2,165.14 / Materials: 12.85% as an a	(Body, Frame & Mechanical Li iverage against sales dollars)	abor: 34.64% / Refinish Labo	or: 24.71% / Parts: 31.75% / Refinish
Estimate Range	Estimate Count	All in Range (Count/Percentage)	Body, Frame & Mechanical Labor in F (Count/Percentage)			
\$2001-\$4000	1	0 (0.00%)	0 (0.00%)	0 (0.0	00%) 0 (0.0	0%) 0 (0.00%)
Shop: Test Freer	nium / Total	Shop Written in dollars: \$2,5	588.84 / Average Sale in dollars : \$2,588.8 Materials: 14.47% as an a	4 / {Body, Frame & Mechani average against sales dollars}	cal Labor: 38.03% / Refinish	Labor: 23.00% / Parts: 18.25% / Refinish
Estimate Range	Estimate Count	All in Range (Count/Percentage)	Body, Frame & Mechanical Labor in f (Count/Percentage)	Range Refinish Lab (Count/Pe		
\$2001-\$4000	1	0 (0.00%)	0 (0.00%)	0 (0.0	00%) 0 (0.0	0%) 0 (0.00%)
Shop: Bob Test S	HOP / Total	Shop Written in dollars: \$2,7	740.68 / Average Sale in dollars : \$2,740. Materials: 12.61% as an a	68 / {Body, Frame & Mechani werage against sales dollars}	cal Labor: 39.22% / Refinish	Labor: 26.27% / Parts: 14.60% / Refinish
Estimate Range	Estimate Count	All in Range (Count/Percentage)	Body, Frame & Mechanical Labor in I (Count/Percentage)	Range Refinish Lab (Count/Pe		
\$2001-\$4000	1	0 (0.00%)	0 (0.00%)	0 (0.0	00%) 0 (0.0	0%) 0 (0.00%)
Shop: Test Sh	op / Total Sh	op Written in dollars: \$3,930	0.00 / Average Sale in dollars : \$3,930.00 Materials: 10.18% as an a	/ {Body, Frame & Mechanical average against sales dollars}	Labor: 30.79% / Refinish La	bor: 20.36% / Parts: 38.68% / Refinish
Estimate Range	Estimate Count	All in Range (Count/Percentage)	Body, Frame & Mechanical Labor in I (Count/Percentage)	Range Refinish Lab (Count/Pe		
\$2001-\$4000	1	1 (100.00%)	1 (100.00%)	1 (100	.00%) 1 (100.	00%) 1 (100.00%)

Below the black bar the estimate is broken down into each shop in the MSO showing scrubbed estimates by size broken into four categories using the dollar amounts of the gross total (before tax). The report then offers the percentages for the 30,20,10 sales mix. This is displayed in the following manner: count/percentage The count is the number of estimates that hit the target 30,20 10%. The % shown is the percentage of estimates that hit the 30,20,10 targets.

<u>To change Percentages:</u> Click the **Personalize Ratio** button to change the percentages for the MSO reports, change the % and click the **Save** button. This will change and save the percentages for all shops in the MSO. <u>If a MSO shop needs</u> <u>different percentages it needs to be changed by shop.</u> To return to the default % open the box and click **Reset** and **Save**.

### Make Sales Mix for MSO

		Start:	6/10/2016 End: 7/15/2016 Create Report Detail Estim	ate Information Printer Friendly Sales M	dix Report	
			MSO Sales Mix			
			Shops Sales Mix for MSO			
			Make Sales Mix for MSO			
		Make: HOND / {Body, F	rame, & Mechanical Labor: 31.61% Refinish Labor: 12.94% / Parts:	46.48% Refinish Materials: 8.16% as an a	verage against sales dollars)	
Estimate Range	Estimate Count	All in Range (Count/Percentage)	Body, Frame & Mechanical Labor in Range (Count/Percentage)	Refinish Labor in Range (Count/Percentage)	Parts in Range (Count/Percentage)	Refinish Materials in Range (Count/Percentage)
\$0-\$2000	1	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)	1 (100.00%)
\$2001-\$4000	3	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)
\$6001+	5	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)
		Make: FORD / {Body, F	rame, & Mechanical Labor: 29.38% Refinish Labor: 15.53% / Parts:	39.90% Refinish Materials: 8.65% as an a	verage against sales dollars}	
Estimate Range	Estimate Count	All in Range (Count/Percentage)	Body, Frame & Mechanical Labor in Range (Count/Percentage)	Refinish Labor in Range (Count/Percentage)	Parts in Range (Count/Percentage)	Refinish Materials in Range (Count/Percentage)
\$0-\$2000	3	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)
\$2001-\$4000	7	3 (42.86%)	3 (42.86%)	3 (42.86%)	3 (42.86%)	3 (42.86%)
\$4001-\$6000	1	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)
\$6001+	2	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)
		Make: JEEP / (Body, F	rame, & Mechanical Labor: 37.28% Refinish Labor: 11.79% / Parts: -	43.05% Refinish Materials: 6.24% as an an	verage against sales dollars}	
Estimate Range	Estimate Count	All in Range (Count/Percentage)	Body, Frame & Mechanical Labor in Range (Count/Percentage)	Refinish Labor in Range (Count/Percentage)	Parts in Range (Count/Percentage)	Refinish Materials in Rang (Count/Percentage)
\$6001+	2	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)	0 (0.00%)
		Make: BUIC / {Body, Fr	ame, & Mechanical Labor: 50.26% Refinish Labor: 20.51% / Parts: 1	4.66% Refinish Materials: 12.62% as an a	verage against sales dollars}	
Estimate Range	Estimate Count	All in Range (Count/Percentage)	Body, Frame & Mechanical Labor in Range (Count/Percentage)	Refinish Labor in Range (Count/Percentage)	Parts in Range (Count/Percentage)	Refinish Materials in Rang (Count/Percentage)
\$6001+	1	0 (0.00%)	0 (0.00%)	1 (100.00%)	0 (0.00%)	0 (0.00%)

### **Estimate Detail for MSO**

Delete Checked-Items		NOTE: The report will	only show one estimate per VIN In to Total = to	Date = Strubbed Estimator to in generitheses are the last 4 of the VNN for the case of suppresents a supplement will o tal dollar amount of the estimate rentage of dollars each category represents	vertay a scrub from a preexisting \	IN	
Date	Shop / Estimator	Vehicle	Total	Body, Frame, & Mechanical Labor	Refinish Labor	Parts	Refinish Materials
7/12/2016	Beau /Beau	2011 HOND (7382)	\$16,407.48	26.03%	10.86%	51.60%	7.96%
7/1/2016	Beau /Beau	2012 NISS (7355)	\$1,218.92	12.47%	12.16%	66.45%	7.36%
	Beau /Beau Beau /Beau	2012 NISS (7355) 2015 HYUN (4752)	\$1,218.92 \$8,823.41	12.47% 38.86%	12.16% 11.84%	66.45% 39.02%	7.36% 7.11%
7/1/2016		E0.00000000000000000000000000000000000					
7/1/2016	Beau /Beau	2015 HYUN (4752)	\$8,823.41	38.86%	11.84%	39.02%	7.11%
7/1/2016 7/1/2016 7/11/2016	Beau /Beau Beau /Beau	2015 HYUN (4752) 2011 Ford (5673)	\$8,823.41 \$3,930.00	38.86% 30.79%	11.84% 20.36%	39.02% 38.68%	7.11% 10.18%
7/1/2016 7/1/2016 7/11/2016 6/30/2016	Beau /Beau Beau /Beau Beau /Bob	2015 HYUN (4752) 2011 Ford (5673) 2002 Ford (0276)	\$8,823 41 \$3,930 00 \$14,160 94	38.86% 30.79% 26.15%	11.84% 20.36% 8.17%	39.02% 38.68% 60.60%	7.11% 10.18% 3.18%
7/1/2016 7/1/2016 7/11/2016 6/30/2016 6/30/2016	Beau /Beau Beau /Beau Beau /Bob Beau /Bob	2015 HYUN (4752) 2011 Ford (5673) 2002 Ford (0276) 2008 Jeep (0909)	\$8,823 41 \$3,930 00 \$14,160.94 \$9,434 55	38.86% 30.79% 26.15% 39.40%	11.84% 20.36% 8.17% 11.32%	39.02% 38.68% 60.60% 42.54%	7 11% 10 18% 3 18% 5 66%

### **Axalta Paint Materials Report**

### **Create a Cost Tracking Detail Report**

### w/Gram Amounts

### Note: A label must be previously created with a RO number

### **1. Open ColorNet**

- a. Select & open the green binder from the tool bar
  - i. A choice screen opens
- b. Click on the + sign for Infinity
  - i. Note this step may already be open
    - 1. The reports screen fully opens
- c. Scroll down to Costing
  - i. Click Costing to open
    - 1. The costing screen opens
- d. Select & Open Cost Tracking
  - i. The Cost Tracking Report screen opens
    - 1. On the right side of the screen
      - a. Select Detail
      - b. Add the date parameters you want to report to cover
        - i. The dates should encompass all paint mixed by RO#'s
      - c. Select Suffix price (MSRP)
      - d. Select All Cost Calculations
- e. Go to the toolbar on top and select Print Preview (green rectangle with yellow dot)
  - i. The Cost Tracking Report opens
    - 1. Select print
    - 2. Select your PDF printer
    - 3. Print as a pdf and store in your estimate claims file

This is report is necessary to create the Axalta Paint Materials Report and also to get a **Axalta Refinish Guidelines Less than Base Coat Mixed (See Pg.36)** flag in your review results. We recommend you create and upload this report weekly and scrub all Estimates with an RO number as you do your final billing to insure you capture all Dollars associated with the repair.

# Section 8-Reports (cont.) Axalta Paint Materials Report

This report collects information from scrubbed estimates and the ColorNet summary Detail Report (See Pg.27) to help you control your paint materials expenses. When you scrub an estimate the refinish application hours are recorded in a "Refinish Materials Report". The report shows in dollars the cost of an overmix over mix (too much paint) and under mix (not enough paint) figures for the refinish. An overmix equates to an un-necessary expense that could be controlled. An under mix equates to a savings/cost on the material mixed to do the job (Possibly making it necessary to remix material and a production delay). To generate this report you must:

- 1. Log in to enhanced security
  - a. Enter your enhanced ID
    - i. The shop information page is displayed
  - b. Select Reports
    - i. Select the date ranges for the "Paint Materials Report"
    - ii. Select "Paint Materials Report"
    - iii. Click on "Printer Friendly Paint Materials Report"
    - iv. Right click on report to print

**NOTE:** (Application hours. For reporting purposes Application hours, using the estimates total refinish hours, are broken into base coat and clear coat categories and displayed as application hours , The following refinish items are excluded from the estimates total refinish hours to create application hours: Tint Color, Cover(Car), Mask for overspray, Spray letdown panel, Color(Sand), De(-nib And buff), Prep raw plastic parts, Chip(guard), Feather(prime And block), Panel(Stripping, Corrosion(Protection), (De-wax and degrease), Add flex additive, Painted(Stripes), and Undercoating.

For reporting purposes Application hours, using the estimates total refinish hours, are broken into base coat and clear coat categories and displayed as application hours ,.

**Instructions to upload:** Go to the black tool bar on the review results page, click Import Data, and browse to select the PDF documents to import. Currently you can import a ColorNet Cost Tracking Summary Report (by date) which can include information for one or more repair orders. The ColorNet Cost Tracking mixing information will be added to the Paint Materials Report. Scrubbed estimates with RO numbers and their application refinish and clear coat hours will

automatically be added to the paint materials database. These lines are displayed by a 🙂 denoting

per the guidelines an overmix or a *denoting an acceptable mix per the guidelines.* RO's displayed with no corresponding material hours are estimates that have not been scrubbed or

have incorrect RO numbers. Missing estimate lines are displayed with a blue question mark.

# Section 8-Reports (cont.) Axalta Paint Materials Report(cont.)

© 8/1/2016	Application	Oz per Hour	Oz	Oz	Over /	Cost per	Over / Under	Application	Oz per Hour	Oz	Oz	Over /	Cost per	Over / Under
123	Hours <sup>^</sup>	Guidline	Needed	Mixed	Under	Oz	Opportunity	Hours	Guidline	Needed	Mixed	Under	Oz	Opportunity
2011 Hyundai Elantra	24.6	2	49.20	115.20	66.00	\$5.15	\$339.60 0	5.2	2	10.40	0.00	-10.40	\$0.00	O 💰
0 8/1/2016	Application	Oz per Hour	Oz	Oz	Over /	Cost per	Over / Under	Application	Oz per Hour	Oz	Oz	Over /	Cost per	Over / Under
1234	Hours <sup>^</sup>	Guidline	Needed	Mixed	Under	Oz	Opportunity	Hours	Guidline	Needed	Mixed	Under	Oz	Opportunity
				3.00			😯				0.00			👔
8/1/2016	Application	Oz per Hour	Oz	Oz	Over /	Cost per	Over / Under	Application	Oz per Hour	Oz	Oz	Over /	Cost per	Over / Under
123456	Hours <sup>≜</sup>	Guidline	Needed	Mixed	Under	Oz	Opportunity	Hours	Guidline	Needed	Mixed	Under	Oz	Opportunity
2005 ACUR TSX	5.7	2	11.40	70.40	59.00	\$8.42	\$496.77 0	1.2	2	2.40	81.63	79.23	\$2.10	\$166.21 0

Enhanced Scrubbing using LeanTec and Axalta Information

When repair orders are scrubbed the estimator is prompted to include the fastener/clips identified in the LeanTec Job Detail Report. If the mixed paint identified in the ColorNet Cost Tracking Report exceeds the Axalta usage guidelines the estimator is prompted to check for missing refinish operations. (see Pg.36)

# Section 9-Printing as a PDF file

The first thing you need to do is decide how/where you will store the PDF estimate. Some shops have already created a claim file to store it. Some create a folder on the desktop. <u>The important point is to store the file where you can easily access it.</u>

#### There are two ways to create a PDF version of an estimate

1. **Printing PDF Files:** We recommend using <u>the free version of PrimoPDF.com</u>. There are two PDF print types, Text and Graphic. The Text PDF type is what EstimateScrubber is able to read. You can tell the difference by trying to highlight a line of print in a PDF file (right click and mouse over the line like you are copying it). If the line highlighted (turns blue) it is a text PDF and will scrub. If the entire page is selected it is a graphic/photo (turns blue) and will not scrub. Print the estimate out of the estimating platform using the PDF program you have chosen, name it and save it to the file you use to store estimate. EstimateScrubber does not recommend using the information providers PDF print programs.

2. **Using an email attachment:** An emailed estimate attachment is a text PDF and will scrub. If you get an outside estimate sent to you as an email attachment it should scrub. You may also use the estimating system to create an email of the estimate as though you are going to send it. After completing the estimate create an email. The email will create an attachment of the estimate. At this point you may copy and paste the attachment into a designated file. You do not need to actually send the file.

#### From here you are ready to scrub estimates

# Section 9-Printing as a PDF file (cont.)



# Common reasons estimates do not scrub.

### There are a number of things that prevent an estimate from scrubbing. When this happens you will get the following message:

Your Estimate Did Not Scrub. These are some common reasons it did not scrub.

### **1**. The PDF printer used to print your estimate is not printing in a text format.

- a. To check your PDF printer
  - i. Try highlighting a line of print (like you are cutting and pasting). If an individual line highlights it is a PDF text printer and should scrub your estimate.
  - ii. If you try to highlight a line of print and nothing happens or it highlights the entire estimate it is a graphic format and will not work.
  - iii. We recommend the free version of PrimoPDF (<u>www.primopdf.com</u>)
- b. You may also create an email instead of printing a PDF
  - i. The email attachment is a text PDF (See Section 9 Pg.29)

# 2. The entire estimate (first to last page) was not converted to a text PDF format.

- a. The estimate must carry the estimating providers' information. This is how it identifies which scrubber module to us.
- **3.** The estimate is a scanned or fax copy.
  - a. The estimate must be printed as a PDF directly from the estimating platform
- 4. The document was printed in a format that EstimateScrubber does not recognize.
  - a. We currently only support estimates printed directly from the Audatex, CCC or Mitchell estimating systems. REL
    - i. CCC ONE, Estimates that will scrub are:
      - 1. Preliminary Estimate or Estimate of Record
      - 2. Preliminary Supplement or Supplement of Record.
  - b. The following will not scrub in EstimateScrubber
    - i. Estimate printed from
      - 1. CCC ONE Management System or
      - 2. Any other Management System.
    - ii. CCC Estimate to Repair is not a complete estimates and will not scrub



The Consumer Estimate was created to assist your customers to better understand the damage repair estimate created by your shop for their vehicle. Typically, damage estimates are created using specialized estimating systems that lists repair and paint operations, parts and other operations using highly specialized technical terms.

The Consumer Estimate reflects the information contained in the scrubbed detailed damage estimate. These 4 categories are represented visually by the following icons:

**Remove and Replaced Parts** 





Remove & Installed (R&I) Parts

Refinished Parts

**Repaired Parts** 

s

A Consumer Estimate takes all that industry specific jargon and groups' items together in three easy to understand summaries as follows:

- 1. The Estimate Line Summary groups all the vehicles repairs into 4 sections by line number. The sections are; Replace, Repair, Remove & Install and Refinish.
- 2. The Overall Damage Summary offers a line by line summary of the major parts damaged on the vehicle along with the icons showing what is being done to the part.
- 3. The Glossary of Common Accident Repair Terms offers easy to understand definitions of terms used on estimates.

# **Creating a Consumer Estimate**

# 1. Scrub an Estimate

- a. Select the Consumer Estimate tab
  - i. A full Consumer estimate is created
    - 1. Note you can select to only show major sections
      - a. Select Major sections only
    - 2. To Print
      - a. Select "Printer Friendly Consumer Estimate"
        - i. Right click
        - ii. Select Print

# Section 11- Collision Parts Source (CPS)



Collision Parts Source is a "clearing house" for parts. <u>CPS allows subscribers</u> to list surplus parts at no cost for 60 day periods. The site also features vendors offering parts at special prices. All scrubber users can view listed parts. Subscribers can list parts. There is no charge for this service.

#### CPS parts now include OEM Overstock, Scratch and Dent Parts

These parts are offered with special pricing by OEM parts vendors who may have an overstock of parts or a part with minor scratches or damage on it. There is a description of the part damage and photos to view the damage. The part is offered at a discounted wholesale price. When you scrub an estimate a Collision Parts Source notification is automatically displayed if there are parts available for the vehicle.

EstimateScrubber.com and VehicleOwnersGuide.com is not involved in any transaction, does not handle payments, guarantee transactions, provide escrow services, offer "buyer protection" or "seller certification".

CHECK THE INTERNET OR PHONE BOOK TO VERIFY THE NUMBER/ADDRESS IS FROM A BONEFIDE BUSINESS THEN CALL THE CONTACT. IF YOU CAN'T VERIFY THE BUSINESS, PERSON OR PHONE NUMBER WE RECOMMEND YOU DO NOT PURCHASE THE ADVERTISED ITEM.

### 1. Scrub an Estimate

- a. Click on the Collision parts source link in the review results or -Select the ScrubberApps tab
  - i. The ScrubberApps screen opens
    - 1. The vehicle year, make and model is extracted from the estimate and automatically displayed.
    - 2. Any parts available are shown
      - a. Shop listed parts on left side of screen
        - i. Contact shop if interested
      - b. Scratch & Dent parts on right side screen
        - i. Click on part offer to open the detail screen which contains a description, price and photos
        - To order or contact vendor add a check on the part description page and click the "Email Checked Parts Vendors orange button at the top of the screen with your inquiry
  - ii. If you want to view all the available parts for any make and model
    - 1. Select the make and model from the "View Available Parts" dropdown box
    - 2. Click Go

# Section 11- Collision Parts Source (CPS) (cont.)

EstimateScrubber.com and VehicleOwnersGuide.com is not involved in any transaction, does not handle payments, guarantee transactions, provide escrow services, offer "buyer protection" or "seller certification".

CHECK THE INTERNET OR PHONE BOOK TO VERIFY THE NUMBER/ADDRESS IS FROM A BONEFIDE BUSINESS THEN CALL THE CONTACT. IF YOU CAN'T VERIFY THE BUSINESS, PERSON OR PHONE NUMBER WE RECOMMEND YOU DO NOT PURCHASE THE ADVERTISED ITEM.

# 1. To Post, Edit, or Delete (CPS) Parts

- a. Click Login/Manage Account
  - i. Enter your Enhanced Security Password
  - ii. You will see the Shop Information screen

Note: Only registered users can list parts.

Parts are removed 30 days from listing unless you select the re-listing option.

- b. Select List Parts for Sale/Exchange from the black toolbar
  - i. A Sell/Exchange Parts screen will open
    - 1. Manage Listed Parts (default setting) Tab opens
      - a. From this screen you can:
        - i. Delete parts
          - 1. Select (add check mark) to the part to be deleted
          - 2. Click Delete Checked Item button
        - ii. Edit Parts
          - 1. Select (add a check mark) to the part to be edited
          - 2. Make changes to part
          - 3. Click "Save Changes" button
        - iii. Relist parts
          - 1. Select (add a check mark) the part to be re-listed
          - 2. Click "Re-list Part" button
    - 2. To list parts for sale
      - a. Select the "List Parts" Tab
      - b. Select Year Make & Model from the dropdown list
      - c. Select Body Type from the dropdown list
      - d. Select the type of part from the dropdown list
      - e. Add a brief description of what you are listingi. Example: LKQ clean r/f headlamp
      - f. Add your price or what you would trade for
      - g. Click submit part
        - c. Part will be listed for 30 days

# Section 12-Multi Shop Organizations (MSO)

**To create an MSO account** you must contact our EstimateScrubber Customer Care Department using the <u>Contact Us/Support</u> link found on black tool bar on the home page or email beau@estimatescrubber.com or <u>sales@estimatescrubber.com</u> directly with a list of shops that are in the MSO. We will create the MSO organization and notify you it has been created along with the MSO ID and Password. When the account is set up you may do the following:

- 1. View a consolidated MSO Estimate usage report by estimator
- 2. Create and share profiles with all the shops in the MSO

**To create a consolidated MSO usage report** by estimator you must first personalize all the computers in your shop that are used to scrub estimates.

#### To personalize your computers

1. Personalize your Work Station (See Pg.9)

#### To Create a Consolidated MSO Estimator Usage Report

- 1. Click on Login/Manage Account in the black tool bar on the home page
  - a. The yellow login screen opens
    - i. Click the link MSO Administration (Top of form)
      - 1. Enter MSO ID and Password
        - a. Accept terms
        - b. Click the login button
        - c. A "Select Shop" screen appears
      - 2. Click on Reports in the black tool bar
        - a. A "Reports" screen opens
        - b. Click on Estimator usage reports
        - c. Select the reporting date ranges
        - d. Click the "Create Report" button
          - i. To print click the "**Printer Friendly Usage Report**" link
          - ii. Right click on the usage report to print

# Section 12-Multi Shop Organizations (MSO) (Cont.)

#### Share Profiles with Other Shops in MSO's

**PLEASE NOTE:** In order to share profiles one shop must create the profiles. It is recommended that one shop take the lead in creating the profiles and share them with the other shops in the MSO organization. You can create one complete profile and use the "Clone" feature to rename it and modify it to accommodate other accounts. This prevents having to create completely new profiles over and over again.

- 2. Click on **Login/Manage Account** in the black tool bar on the home page
  - a. The yellow login screen opens
    - i. Click the link MSO Administration (Top of form)
      - 1. Enter MSO ID and Password
        - a. Accept terms
        - b. Click the login button
        - c. A "Select Shop" screen appears
    - ii. **Step 1 "Please Select a Shop**" dropdown list select the shop with the profiles to be shared
      - 1. This dropdown list shows all the shops in the MSO
      - 2. Select shop
      - 3. Step2 Click" Get Shop Profiles to Share"
      - 4. A "Select Profiles to Transfer" screen opens
      - 5. Step 3 Select & add Check to the profiles to share (left side of screen)
      - 6. **Step 4** Select & add check to the shops receiving profiles (right side of screen)
      - 7. Step 5 Click the "Copy Checked Profiles to Checked Shops" button
        - a. You will see a message "The selected profiles were shared with other selected facilities"

# Section 13-Enhanced Scrubbing - Data Exchange

Data exchange allows you to upload/download data from/to other sources. An example of this is the ability to upload paint mix information from Axalta and clip and fastener information LeanTec. This upload allows EstimateScrubber to match, by RO number their information with your scrubbed estimates, set flags suggesting you to add the cost of the products in your estimates. This requires an upload of the information on a set basis before final billing is submitted. Each upload is done by a date range that you create. When there is a match you will see the following flags

LEANTEC	Repair Order Clips and Fasteners A LeanTec Job Detail Report with clips and fasteners (\$28.75) was found. Are all these fasteners and clips included on the final repair order?
A	Paint Materials Guidelines less than Base Coat Mixed Based on the Axaita standard of 2.0 ounces of RTS product for base and 1.8 ounces per clear, we calculated use at 11.6 ounces of base and 2.9 of clear and your Axaita ColorNet consumption shows you used 39.8 ounces of base (19.9 hours) and 15.0 ounces of clear (8.3 hours). Did you paint other parts for which you weren't paid?

If you use either of these companies' products and would like to participate you can go to the Black Tool Bar on the welcome page select Shop Information and add check marks to **Review R.O.'s Against LeanTec Inventory Usage** and **Review R.O.'s Against Axalta Base/Clear Usage** or contact us through the **Contact Us/Support** link on the Home Page

# Section 13-Enhanced Scrubbing using Axalta Information

If your shop uses Axalta Refinish products and ColorNet you may receive a Axalta Refinish Guidelines Less than Base Coat Mixed flag. Using the scrubbed estimate and by uploading the ColorNet Cost Tracking Summary Detail Report (see Pg. 36) the number of refinish application hours is compared to the actual paint mixed. If more paint was mixed than the application hours required, using the Axalta guidelines, you will receive the flag message appearing below. If you receive this message you may want to check for missing refinish opportunities in the estimate or an over mix of paint. A paint overmix indicates waste and monies lost.



Paint Materials Guidelines less than Base Coat Mixed

Based on the Axalta standard of 2.0 ounces of RTS product for base and 1.8 ounces per clear, we calculated use at 11.6 ounces of base and 2.9 of clear and your Axalta ColorNet consumption shows you used 39.8 ounces of base (19.9 hours) and 15.0 ounces of clear (8.3 hours). Did you paint other parts for which you weren't paid?

To receive this flag requires that the scrubbed estimate and a PDF copy of the **detail report**. <u>They must have matching RO numbers</u>.

- 1. To **create** the ColorNet Cost Tracking Summary Detail Report (see Pg. 26)
- 2. To upload the ColorNet Cost Tracking Summary Detail Report
  - a. Using the black tool bar Login
  - b. From the black tool bar select Data Exchange
  - c. If **Data Exchange** is greyed out you may have to enter enhanced security to enable the link
    - 1. You will see a page titled **Data Exchange**
    - 2. Click on Import ColorNet/ LeanTec Documents button
      - a. Browse (Select file) to find file
      - b. The file name will appear in the window
      - c. Click upload if correct file
        - i. Click remove if incorrect

# Section 13-Enhanced Scrubbing using LeanTec Information

If your shop uses LeanTec supply cabinets you may receive a **Repair Order Clips and Fasteners flag**. Using the scrubbed estimate and by uploading the **LeanTec Usage Report** (see Pg. 36) the number of clips, fasteners and other related items is compared to scrubbed estimate. If clips, fasteners and other related items are found in the usage report and not on the estimate the estimator will receive the flag message appearing below. If you receive this message you may want to check for missing clips, fasteners and other related items in the estimate. You can import Job Detail Reports from the LeanTec Inventory Solutions Prophet-C system. Simply print and upload the Job Detail Report. Clips and other fastening costs for individual repair orders will be added to the fasteners database



Repair Order Clips and Fasteners

A LeanTec Job Detail Report with clips and fasteners (\$28.75) was found. Are all these fasteners and clips included on the final repair order?

To receive this flag requires that the scrubbed estimate and a PDF copy of the **LeanTec usage report**. <u>They must have matching RO numbers</u>.

- 1. To create the Usage Report (see Pg. 38)
- 2. To upload the LeanTec Usage Report
  - a. Using the black tool bar Login
  - b. From the black tool bar select Data Exchange
  - c. If **Data Exchange** is greyed out you may have to enter enhanced security to enable the link
    - 1. You will see a page titled **Data Exchange**
    - 2. Click on Import ColorNet/ LeanTec Documents
      - a. Browse (Select file) to find file
      - b. The file name will appear in the window
      - c. Click upload if correct file
        - i. Click remove if incorrect

# Have Questions or Need help?

- Use the EstimateScrubber Contact Us link on the Home Page
- Use the Report Scrubbing Issue on the Results Page
- Email Sales@estimatescrubber.com
- Text / Call Beau Brandon @ 619 518 4798
- Call Bob Sandkaut @ 858 206 2020



Remember never a contract or long term commitment!