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"Pinnacle Classic vs Pinnacle Pro – What is Different?"
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As outlined in our cover letter, this list has been compiled in an effort to highlight the major differences between Pinnacle Classic and Pinnacle Pro. The list should not only help you decide whether or not you are ready to convert, but also point out the foremost variations between the two applications. This not only includes items on the development schedule, but also functionality that works differently but achieves the same result. Additionally we have included some of the major advancements within Pinnacle Pro that are unique and new to Pinnacle Classic. This list is as complete as we could make it but we cannot guarantee we caught everything.

Development Scheduled (i.e. Upcoming Builds):

- Charges added automatically to invoices like EPA Charge. These currently can be added manually
- Attaching a surcharge to an interchange and having Pro prompt to add it to an order when selling a part with that interchange. Ability to set a default core charge by part type. Terminology relating to this request "core", "core charge", and "surcharge."
- Print the VIN on invoices for URGnet parts belonging to Eden trading partners. Currently this must be manually added. VINs for parts belonging to Pinnacle Classic and Pro yards do appear on invoices.
- Add cost column on Parts Sold Report for new parts.
- Ability to define part aliases. Pro currently has tied Hollander numbers to Pinnacle part codes for use on the "command line".

Development Under Discussion:

- Add New Parts Profitability Report- This report is just based on Cost/Profit currently. It is not as comprehensive as the New Parts Report in Classic. There is a New Parts Module currently being developed.
- Ability to prompt for a Trace ID when selecting a customer for an order if the customer does not have one.
- Ability to have a Wholesale and Retail markup percentages for new parts.
- Map customers to delivery zones. Pro does have the ability to map customers to delivery routes based on ZIP codes.
- Display profit of the vehicle in the MVR. Pro does display the cost, sales to date, and projected revenue.
- Multiple Tills or the ability to assign a till to each individual person taking money with a report that shows "how much" should be in the till.
- The ability to put a "Customer" and a "Shop" on a quote and use either one as the customer when converting the quote to an order. Pro has the ability to have a customer and a separate bill to address but certain aspects of this functionality are still being optimized.
- Change the order of interchange choices on the PDR to be by IC description versus IC# so it matches with Find Parts screen.
- Open/Close Delivery Routes
- Ability to roll back payments that have been allocated
- Preference to automatically confirm an order for delivery when it is invoiced.
- Allow any classification of a vehicle except repairable/returned/inactive to be dismantled. Currently only the classification

of "dismantle" can go thru the full dismantling process.

- Add an invoice on more than one route.
- The ability to look up orders by criteria provided in the Ctrl-A functionality in Classic. Currently the only options missing are IC Application and Stock Number; these have been requested as additions to the Find Orders Screen.
- Pro does not remember the customer like Classic does when the user selects "K" for pick another parts. Users of rapid part search utilities that do not produce quotes only searches utilize this feature heavily.
- Ability to modify "Sales to Date" in MVR records. Currently all Sales To Date within Pro is based on the exact number of invoices and credits produced within the system.

Development Not Confirmed:

- Add a surplus parts status
- Create a Back Order system
- Ability to exclude specific parts from pricing
- Credit card numbers are not stored in Pro
- Unable to export data to QuickBooks. These numbers can be manually pulled from the reports and added to QuickBooks.

Additional Classic Features Identified as not in Pro

These features were identified by the CFC but have not been placed in one of the above categories by ASA.

- Ability to find orders by the Delivery name. In Classic a user could add a delivery name without adding to the phonebook. In Pro the customer/delivery address must be entered into the system.
- In Classic, when the salesman selects a Delivery Address, the Bill to address of the account automatically fills in. This makes it very easy to handle the situation where there are many shops (Tuffy Muffler) and one billing address and one statement. The user looks up Tuffy; selecting the correct address fills in the customer's main address. Pro only searches for accounts when searching the phonebook, Delivery Addresses only appear within an Order.
- Similar to the item above, in Pro there is no indicator of whether the user is looking at a Delivery address on the Order Screen. Again, when a user searches the system for a customer they will only be viewing the account and no delivery addresses. The delivery addresses will appear in the Order Screen. However, these are both displayed by "name" and the names are the same unless manually edited by the user. The user can't tell (on order screen) if the "Jones Chevrolet" displayed is the main billing address or the delivery address; just by looking. They can hoover over the name and the address will appear confirming if it is the delivery or account address.
- Ability to set the 'days to break" for the master part rather than for the component parts. Presently the days to break even is set when the master part is entered into inventory along with the subparts. Once the delay is passed the only way to extend the assembly time is to update each of the subparts to maintain the subparts being hidden.
- Add preference to print part comments on inventory tags. Currently in pro part comments always print on inventory tags.
- In Classic it was possible to create inserts in which the salesman could add information, such as original PO numbers on credits. In Pro, adding text to an insert destroys the formatting making it very difficult to read. This is presently a "bug" in Pro and has been requested as a fix.

Pinnacle Classic vs. Pinnacle Pro — Alternative Functionality:

The items below have not been added into Pinnacle Pro exactly as they were in Classic because there are alternative ways to achieve the same result.

- Pro does not prompt for customer's RO but can be added to the order manually even after a part is invoiced.
- The IC Apps Report does not show Std Price, Core price, or Pinnacle Part Type code (AA etc). These can be added manually if needed.
- There is no customer's "Department" field, although such information can be entered as a note.
- A quote can only be converted to a work order once. A quote, workorder and invoice are all linked together in Pro.

Pinnacle Classic Reports Not Included in Pinnacle Pro:

Some reports from Classic have deliberately not been reproduced in Pro. It is our intention to reproduce reporting functionality that has real value; therefore we believe the original intention of these reports in Classic has been dealt with elsewhere in the new application unless otherwise indicated.

Business reports:
- B5 In-Till report – *Part of the Multiple Till Feature Currently Under Discussion*

Sales Reports:
- S4 Sale Comparison Graph – *Dynamic Sales Stats can be run as a Bar or Pie Chart*
- S22 Activity by business type

Stock Reports:
- T5 Stock Check
- T9 Crush MVR Vehicles
- T10 Surplus Parts Report
- T15 Dismantling priority report
- T17 Buying Priority Report
- T22 Out of Stock Requests
- T26 Stock Input Report- *Modify Part can be run based on part age and printed to gain the same result.*

Management/Sales Reports/Monthly Checkup Reports
- S8 Invoice Payment Types – *Development Scheduled*
- S16 Monthly Checkup Report- *Development Under Discussion*
- S24 Salesperson Review
- S25 Customer Category- *Request for % of categories to be added to S13 Sales by Customer Category.*
- S26 Sales Performance Review – *Development Not Confirmed*
- S27 Inventory Performance- *Development Not Confirmed*

Shipping-Delivery/Reports
- D1 Route to Zip Report - *Development Not Confirmed*
- D2 Route Report – *Replaced with the D4 Delivery Report*
- D3 Service Option Report - *Development Not Confirmed to add a service options to Pro*

Time Clock Reports:
- Cl Clocked In/Out reports

Advanced Functionality in Pinnacle Pro but not in Pinnacle Classic:

Below are just a few of the many advanced features that are new to Pinnacle Pro that were not available in Pinnacle Classic.

- Customizable control centers
- Order manager integrated with the shipping module
- New reports
  - Part Puller Detail Report
  - (B 11) Part Puller Commission Report
  - (T1) Stock Summary Report
  - Crushed Vehicle Report
  - Sold Vehicle Report
  - Dismantlers Report
  - Orders & Invoices Report
  - Alternative Index Report
  - Advertising Source Report –*similar to Source Popup Report*
  - D4 Delivery Report
- Report modifications
  - (P3) Purchase Order Detail Report
  - (A2) Sales Transaction Report
  - (V2) Vehicle Stock Report
  - (S10a) Site Sales Summary Report

    - (T20) Under Stock Report
    - S2A & S2B combined under one report generator
    - A5 Accounts Receivable headings now list STMT 1, STMT 2 and so forth instead of 30,60,90, 180+. As aging is based on statement generation not actual days.
- Jim Counts new report module
    - Buyer Quick Reference
    - Sales by Suggestion and Payroll Report
    - Projected Sales Report
    - Vehicle Evaluation
    - Part Sales by Quarter
    - Sales Report
    - Sales by Part Age
    - Actual vs. Proj. Sales
    - Part Evaluation (C4)
    - Quick and easy budge
    - Days to break even
    - Vehicles with no cost
    - Pre-crush Vehicle Analysis
    - Avg Year and # of Vehicles
    - Minimum Part Price Table

- Detailed order, customer, part, and vehicle history
- Ability to email quotes, work orders, invoices, reports, and statements
- Internal and external chat system
- Real-time networking
- Ability to put deposits on work orders
- Hollander codes linked to Pinnacle part codes
- Delivery tags
- Ability to add charges inclusive of part price
- Preference to put parts in resolution when workorder is cancelled
- Customizable columns in search results screen
- Customized layouts for quotes, work orders and invoices
- Advanced security features
- Ability to quickly view the search results screen from manual pricing
- Ability to un-crush vehicles
- Feature to bulk re-price inventory based on dollar or percentage
- Restocking Fee for Credits
- Order wizard settings
- Tracking numbers attached to an order for UPS, Fedex etc.
- Return Merchandise Authorization
- Integrated Ebay Module
- Integrated Phone System Module & Control Centers
- Edit existing comments on invoices in addition to add/edit PO, RO & Claim Numbers.
- Search for Replacement Parts when an alternative part is unavailable without logging another search.
- Remote WO Configuration
- Barcoding / Scanning for production processing and tracking
- Add PDF's, .txt documents and video to the MVR
- Additional Part Search Options for Finding Parts such as but not limited to part age, manufacturer, year of the part and combination searches.