INFOMEDIA™

# SUPERSERVICE CONNECT

## Settings Guide

SUPERSERVICE™ Connect

# Contents



# Introduction

Superservice Connect is an innovative appointment system that integrates seamlessly with your website. The Connect booking system allows customers to book vehicle services and repairs online anytime, enhancing customer convenience and dealership productivity.

This guide is divided into the following sections:

- Access Superservice Connect
- Create booking templates
- Set the booking management options
- Publish the customer portal
- Configure transportation options
- Configure appointment options
- Configure general settings
- View and edit appointments

# Superservice Connect

Superservice Connect can be configured to use data from Superservice Menus or from an external source.

## Superservice Menus Data

For Superservice Connect customers using service and repair data from Superservice Menus, the pricing that displays in Superservice Connect and in the Customer Portal is based on the price settings that are configured in Superservice Menus.

To ensure that the service pricing for customers displays correctly, you must set up labour rates, sundries and tax rates from the Settings menu in Superservice Menus.

For more information, refer to the Superservice Menus Settings Guide.

## External Data Sources

For Superservice Connect customers using data from an external source, no additional pricing setup is required.

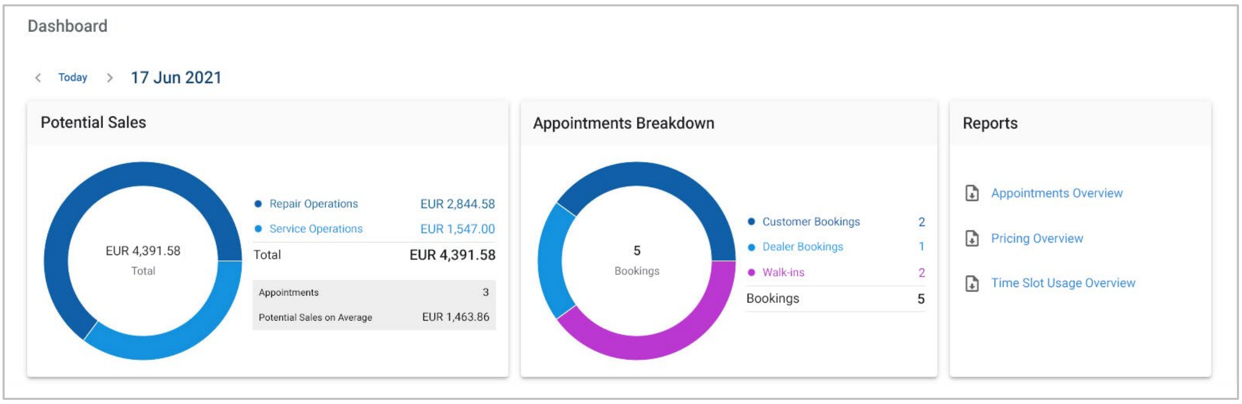
In addition, by using the Infomedia Add-on Portal, dealers and distributors can create add-ons that are not included in the standard service and repair data.

For more information, refer to the Add-on Portal Getting Started Guide.

# Dashboard

The Dashboard provides a snapshot of your service and repair bookings for any given day.

You can access the Dashboard anytime to easily view, monitor and manage all your service and repair bookings.




The information displayed on the Dashboard includes:

- **Potential Sales**: View the total booking value of repair and service operations.
- **Appointments Breakdown**: View the number and type of bookings.
- **Reports**: Download and share reports including Appointments Overview, Pricing Overview and Time Slot Usage Overview.
- **Appointments Overview**: View bookings for the day by time slot. Filter the booking type, data type and the chart display. Hover your mouse over the appointment time slots for more information.
- **Appointments Status**: View bookings that are currently in progress, booked, cancelled or missed. You can also see if the bookings have been made by the customer or the dealer.
- **Time Slot Usage**: View the number of time slots that are in use and not in use. You can also see the breakdown of missed, cancelled and empty time slots.
- **Potential Sales**: View the parts, labour and sundries value for service or repair operations. You can also filter by finished bookings.

- Use the < **Today** > arrows to navigate to the next or previous day or click the date to access the calendar.

# Booking Templates

Connect provides the flexibility to set up and control the bookings available at your dealership. You can use the default booking template or create your own templates. For example, create a morning only template which can be applied on Saturdays.

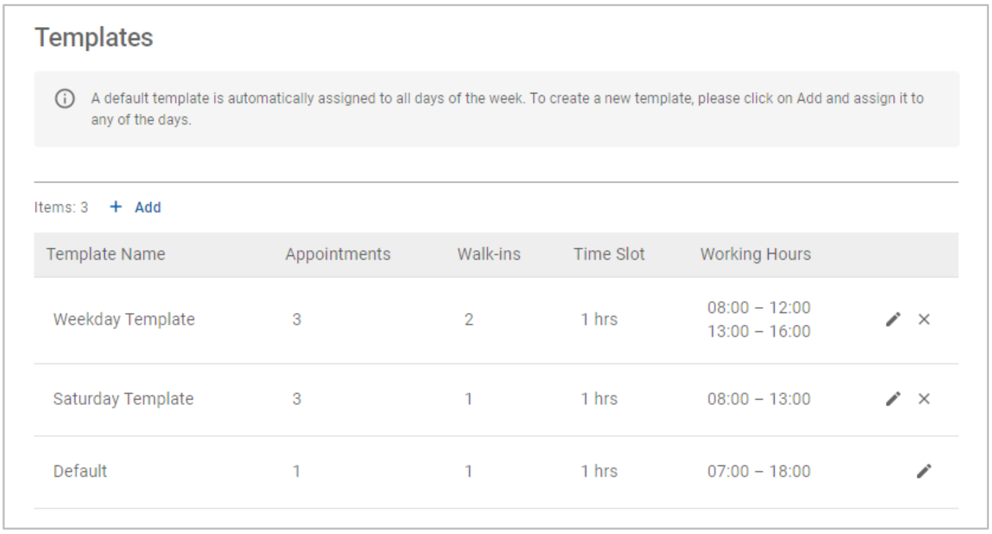
- Go to: **Appointment Manager → Settings → Templates**

## To create a new template:

1. Click **+ Add**.
2. Enter a name for the template.
3. Select the number of appointments that can be made per time slot.
4. Select the number of walk-ins that can be made per time slot.
5. Choose the duration for the time slot from the drop-down.
6. Set the working hours for the day. For example, from 9 am to 12 pm.
7. Click the + icon to set additional working hours for the day.

   For example, from 1 pm to 5 pm.
8. Click the + icon to add extra working hours (if required).
9. Click **Save**.

   The new template will display on the Templates screen.
10. Create additional templates as required.



Templates

A default template is automatically assigned to all days of the week. To create a new template, please click on Add and assign it to any of the days.

Items: 3 + Add

| Template Name | Appointments | Walk-ins | Time Slot | Working Hours |
|---|---|---|---|---|
| Weekday Template | 3 | 2 | 1 hrs | 08:00 – 12:00<br>13:00 – 16:00 |
| Saturday Template | 3 | 1 | 1 hrs | 08:00 – 13:00 |
| Default | 1 | 1 | 1 hrs | 07:00 – 18:00 |

- Click the ✎ × icons to edit or delete a template.

# Booking Management

After you've created your templates, you can allocate a template to each day of the week. The hours set up within the templates provide the available time slots that customers can select for their booking.

You can also close bookings for holidays or other special days under Booking Management.

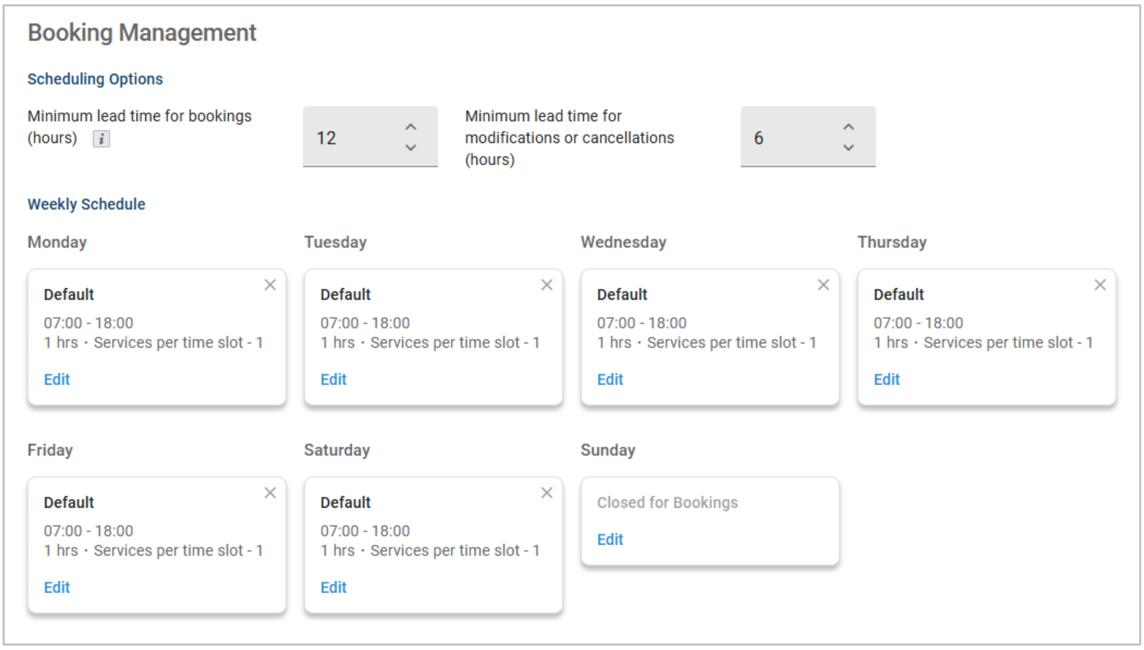
- Go to: **Appointment Manager** → **Settings** → **Bookings**

## Scheduling Options

The scheduling options allow you to set the minimum lead time for bookings and cancellations.

- **Minimum lead time for bookings (hours)**: The minimum number of hours given to customers to create a booking before the start time of the booking.
- **Minimum lead time for modifications or cancellations (hours)**: The minimum number of hours given to customers to modify or cancel a booking before the start time of the booking.

- The minimum lead times can be set by clicking the  arrows.



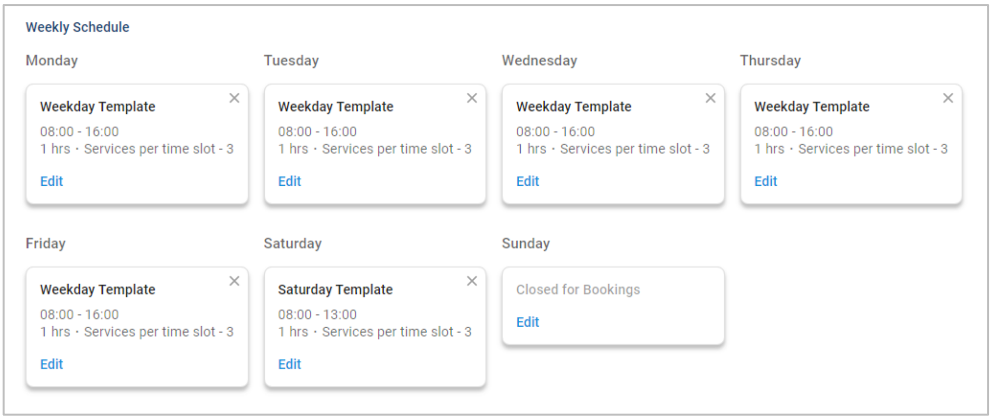
## Weekly Schedule

In the Weekly Schedule screen you can use the default template that is automatically applied, or you can apply a customised template for each day of the week.

### To apply a template:

1. Click **Edit** on the required day.
2. Select the template you need.
3. Click **Save**.
4. Continue to apply a template for each day of the week.

   You can choose the **Closed for Bookings** option for days that the dealership is closed for online bookings.




- Click **Edit** to apply a different template for the required day.

## Holidays and Other Special Days

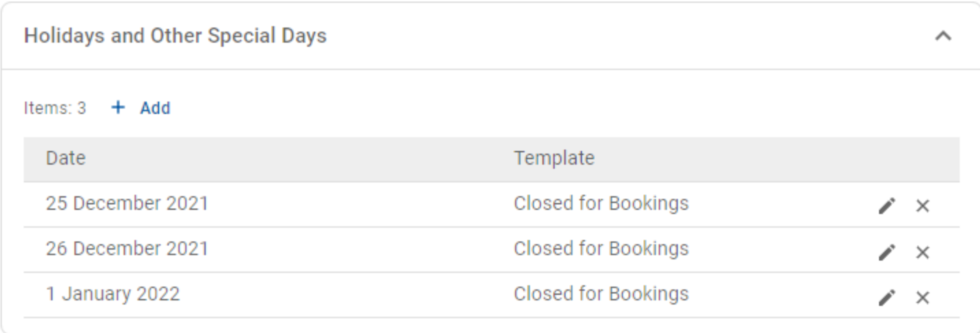
You can apply a specific template for holidays or other special days for when the dealership will be closed for online bookings.

### To apply a template for a holiday or other special day:

1. In the Holidays and Other Special Days section, click **+ Add**.
2. Double-click the calendar icon and choose the required date.
3. Click the + icon to add another date (if required).
4. Choose the **Closed for Bookings** template.

   You have the option to choose other templates (if required).
5. Click **Add**.

   The selected dates will be displayed.




- Click the ✎ × icons to edit or delete a date.

# Customer Portal Settings

The Customer Portal options allow you to configure general settings, transportation options and appointment options.

- Go to: **Appointment Manager** → **Customer Portal** → **General Settings**

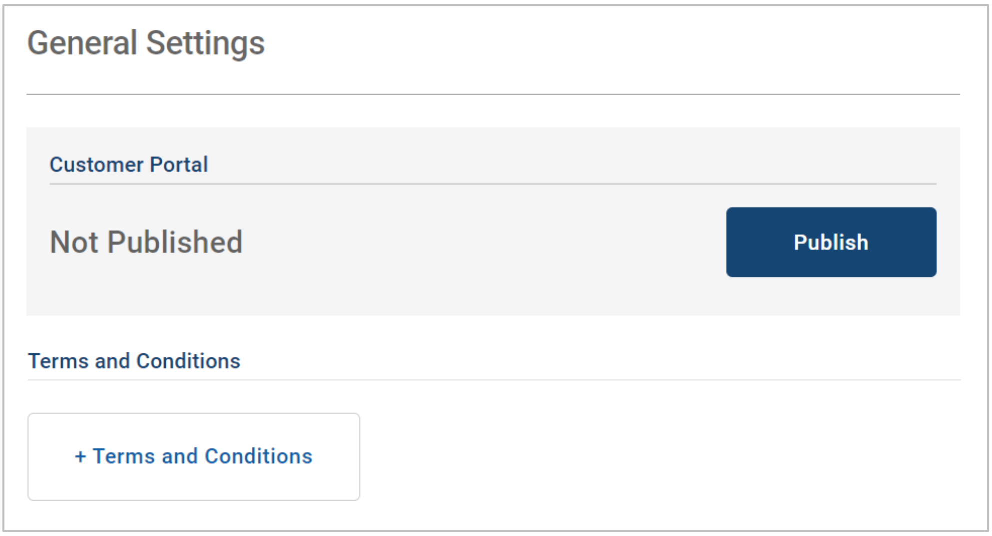
## General Settings

From the General Settings screen you can publish the Customer Portal to allow customers to make their own appointments for your dealership.

### To configure general settings:

1. Click **+ Terms and Conditions** to add the terms and conditions for customers.
2. Enter the terms and conditions and click **Add**.
3. Click **Publish** to publish the Customer Portal.

   If the Customer Portal has been published, the Publish button will not be displayed.



## Transportation Options

The Transportation Options screen allows you to set up transportation options to offer your customers.

- Go to: **Appointment Manager → Customer Portal → Transportation Options**

### To create a transportation option:

1. Click **+ Add**.
2. Enter a name for the transportation option.

   If required, enter an ID that matches the transportation option used in your DMS.
3. Configure the transportation options:
   - **Limited Availability**: Allows you to set the available capacity for the day if there is a maximum capacity for the transportation option.
   - **Additional Cost**: Allows you to inform the customer that there will be an additional cost for the specified transportation option.
   - **Terms and Conditions**: Allows you to add terms and conditions for the specified transportation option.
   - **Additional Options**: Allows you to add sub-options for the transportation option.
4. Click **Add**.

Transportation Options

Items: 7 + Add

| Transportation Option | Availability | Additional Cost | Terms and Conditions |
|---|---|---|---|
| I will wait at the dealership | - | - | - |
| I do not require transportation | - | - | - |
| Courtesy Car | 5 | ✓ | ✓ |
| Valet Service | 1 | ✓ | ✓ |
| Shuttle Bus | 6 | ✓ | ✓ |
| Courtesy Car Options | - | - | - |
| I would like a lift to the local train station | - | - | - |
| I would like a lift to the local shopping centre | - | - | - |
| Self-ride Options | 4 | - | - |
| E-Bike | - | - | - |
| E-Scooter | - | - | - |

- Click the icons to edit or delete a transportation option.

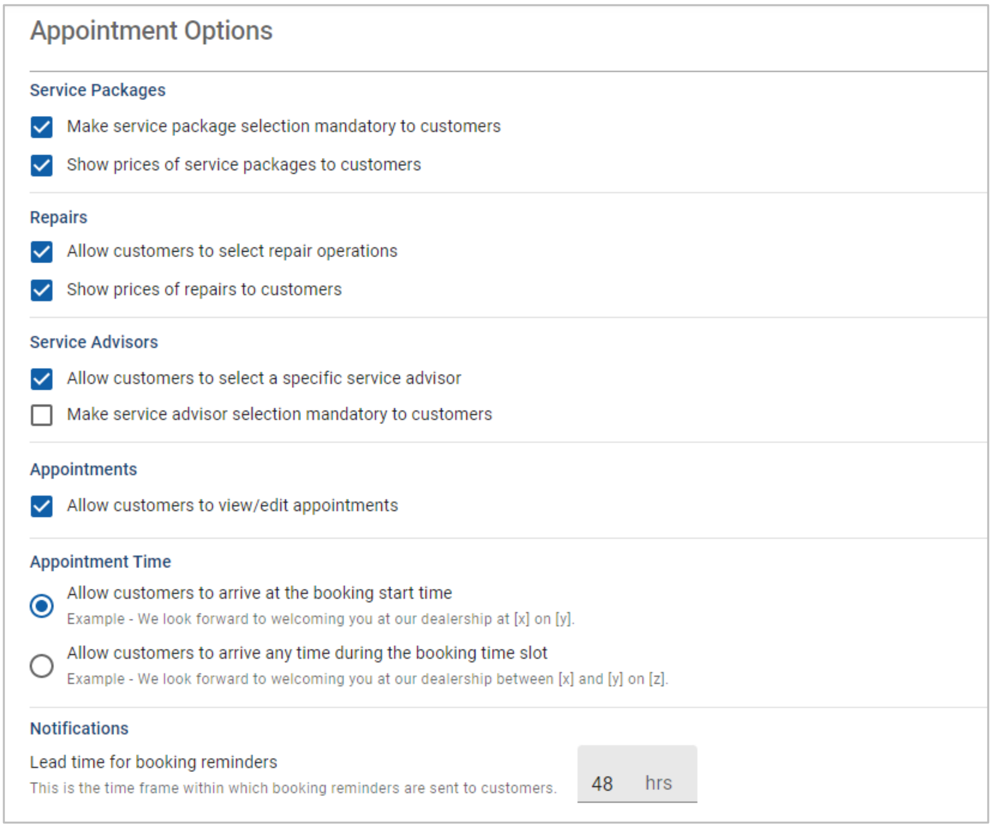
## Appointment Options

Connect offers the ability to configure appointment options such as service advisor selection, pricing display or repair selection. These options will be displayed for the customer to choose when they make an appointment.

- Go to: **Appointment Manager → Customer Portal → Appointment Options**

Configure the following appointment options:

- **Service Packages**: Ensures that customers select a service package when they make an appointment. You can choose to display the price of service packages.
- **Repairs**: Allows customers to select repair operations when they make an appointment. You can choose to display the price of repairs.
- **Service Advisors**: Allows customers to select a service advisor when making an appointment. You can choose to make this a mandatory selection.
- **Appointments**: Allows customers to view and edit their appointments (if required).
- **Appointment Time**: Allows you to customise the message to be displayed on the booking confirmation page. You can let customers know that they are expected to arrive at the booking start time, or at any time during the booking time slot.
- **Notifications**: Allows you to configure options for the notifications that will be sent to customers (if available).
- **Preferred Pick-up Details**: Allows you to configure the preferred pick-up time and date options that are visible to your customers when they make an appointment.



# Dealer and Employee Settings

The Dealer Settings screens display the employees who have access to the system and allow you to assign system users to groups.

- Go to: **Dealer Settings** → **Employee Management** → **Employees**

## Employee Management

The Employee Management screen allows you to view employees who have access to the Superservice Connect application.

You can view details such as the type of user, email address and role (if assigned).

## Group Management

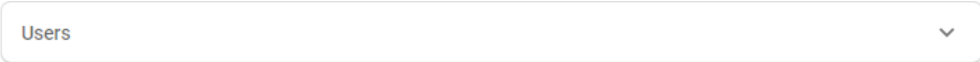
The Group Management screen allows system administrators to add system users to the relevant group. By default, five employee groups are provided.

The permissions for each group are preset and cannot be edited. The list of permissions is displayed in the User Permissions section for each group. To customise the permissions for a user or group, you can create a subgroup.

- Go to: **Dealer Settings** → **Employee Management** → **Groups**

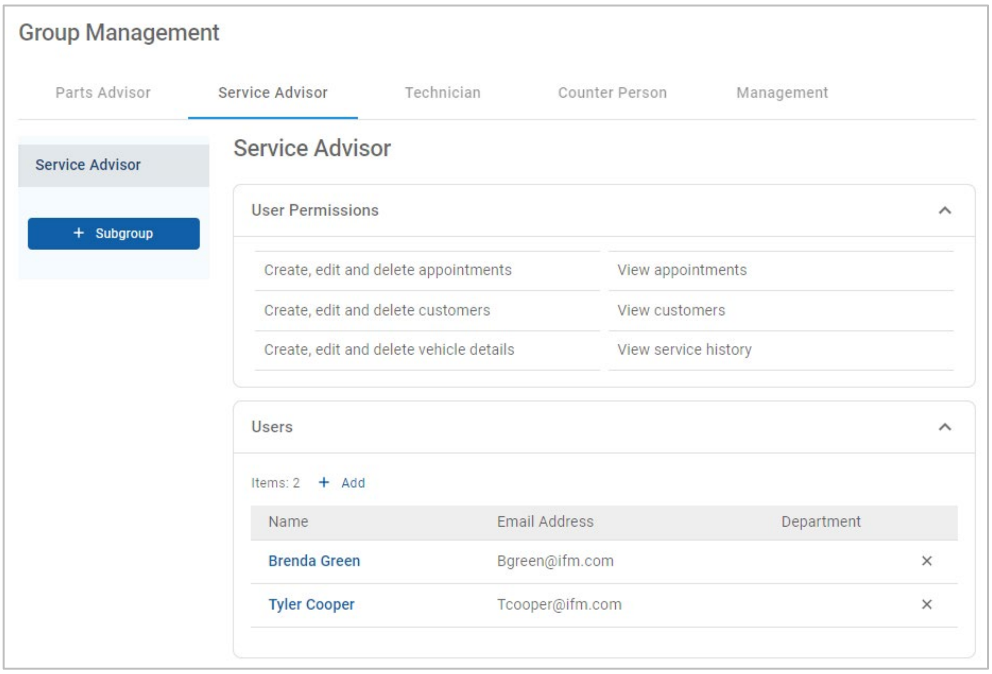
### To add a user to a default group:

1. Select the group that you want to add the user to.
2. Click the **Users** panel.

3. Click **+ Add**.

   The panel to add users will display.
4. Click in the **Search** field and search for the user or select the user from the list.
5. Click **Close**.



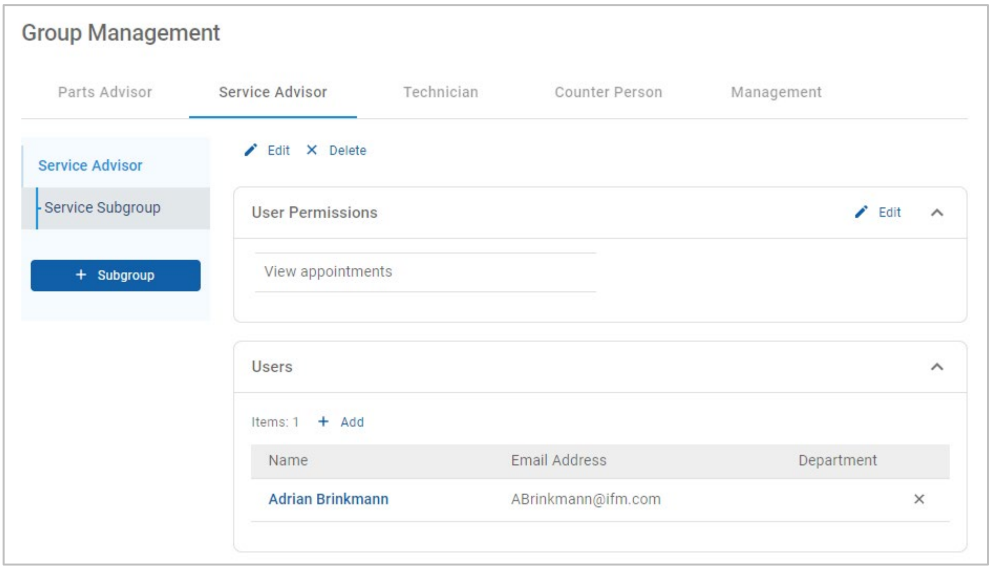

- Only system users can be added to a group or subgroup.
- System users assigned to the Service Advisor group will be displayed in the Customer Portal and can be selected by the customer (if enabled).
- To remove a user from a group, click the × icon next to the user’s details.

### To create a subgroup:

1. Select the group you want to create the subgroup under.
2. Click **+ Subgroup**.

   The Subgroup Details panel will display.
3. Enter a name for the subgroup.
4. Select the permissions you want to include for the subgroup.
5. Click **Add**.
6. Search for system users and add them to the subgroup.
7. Click **Close**.

   The subgroup will display under the main group from which it was created.

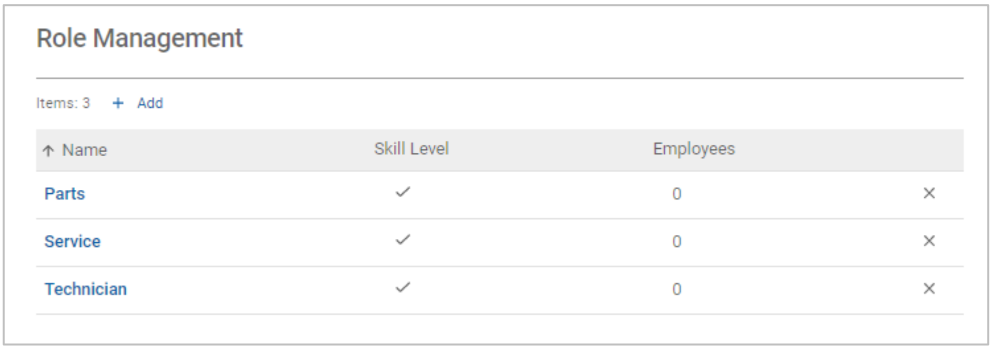



- Only system administrators have permission to create subgroups.
- Only system users can be added to a group or subgroup.
- Click the **Edit** icon to edit the details of the subgroup.
- Click the **+ Add** icon to add system users to the subgroup.

## Role Management

The Role Management screen gives you the ability to create specific roles based on your dealer requirements.

- Go to: **Dealer Settings** → **Employee Management** → **Roles**




- The Role Management screen only provides limited functionality in the initial release of Superservice Connect.
- Creating and assigning roles is not a critical step for the initial setup of Superservice Connect.

# General Settings

The General Settings screen allows you to view and edit dealership information and change the Google map location that is displayed for customers.

- Go to: **Dealer Settings** → **Settings** → **General Settings**

## Edit Contact Details

Dealer details can be edited in the **General Settings** screen. The email addresses entered here will be used to notify dealers about new or updated customer appointments.

To edit or add an email address:

1. Click **Edit**.
2. Ensure the **Time Zone** and **Language** drop-downs are set to your local requirements.

   The language you select ensures that emails sent to dealers are in your local language.
3. Confirm the contact details for the dealership are correct.
4. Click the + icon next to **Contact Email** to add an email address.
   - Click the + icon again to add an extra email address (if required).
   - Click the × icon to remove an email address (if required).
5. Click **Save**.

## Edit Opening Hours

The dealership opening hours can be edited by the day of the week. The hours of operation are displayed on the Customer Portal when the customer books their service online.

*The opening hours may be pre-configured based on your franchise or region.

To edit or add the opening hours:

1. Click **Edit**.
2. Configure the following options:
   - Select an alternate opening and closing time from the drop-down lists.
   - Click the + icon to add opening and closing times.
   - Click the × icon to remove the opening and closing times (if required).
   - To close bookings for a particular day, click the icon.
3. Click **Save**.

- Any changes made to the opening hours must also be updated in the booking templates. Go to: **Appointment Manager** → **Settings** → **Templates**.

## Change Map Location

### To change the location on the map:

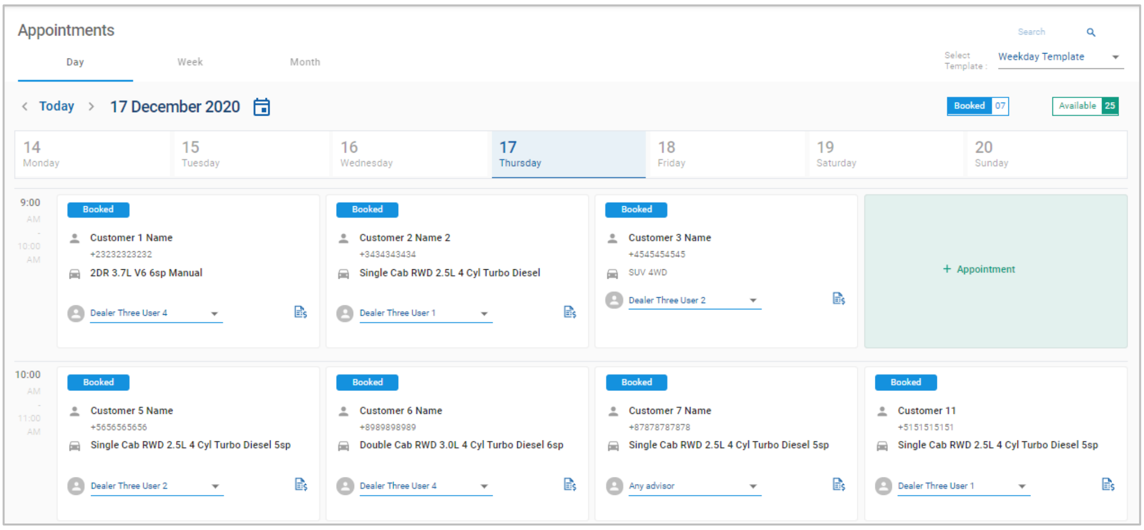
1. Click **Change Location**.
2. Enter the address in the **Address** search box.

   Or drag the pin to the desired position on the map.
3. Drag the map to adjust the position (if required).
4. Click **Save**.

# Appointments

The Appointments screen is where you can view all customer appointments by day, week or month. You can create appointments for your customers and edit appointment details.

- Go to: **Appointment Manager → Appointments**




Appointment types are indicated in the following ways:

| | |
|---|---|
| Booked 01 | The number of appointments made by the customer or dealer. |
| Walk-ins 01 | The number of appointments made on the day by the dealer. |
| Available 26 | The number of appointments still available. |
| Missed 01 | The number of appointments that have been missed. |
| Finished 01 | The number of completed appointments. |

- Click the Superservice Menus icon on the appointment tile to view detailed operation information (if available).

## View Appointments

### To view appointments for a day:

1. Click the **Day** tab above the calendar.
2. View the appointments for the entire day.
3. Use the drop-down arrow ▾ on the appointment tile to assign or change the service advisor.
4. Use the < **Today** > arrows to navigate to the next or previous day.
5. Click on an appointment tile to view or edit the appointment details.
6. Click the ✕ icon to close the **Appointment** panel.

- Select the **Week** or **Month** tabs to view the calendar in a week or month view.

## Create Appointments

### To create an appointment:

1. Click the **Create Appointment** button.

   You can also click **+ Appointment** on any available appointment tile.
2. Identify the vehicle by VIN and click **Search**.

   Or select the vehicle from the available drop-down lists.
3. Enter the registration number and mileage.
4. Add the required service and repairs:
   - Click the **Service** ⊕ or **Repairs** ⊕ icon.
   - Select the service or repairs from the available options.
   - Click the *i* icon to see more details for the operation.
5. Click **Save**.
6. Select a service advisor from the drop-down list.
7. Click the ✎ icon to select a transportation option, then click **Save**.
8. Complete the customer details, including a correct email address.
9. Select a date and time for the drop-off and pick-up of the vehicle.
10. Click **Save**.

    The appointment will display in the calendar for the selected date.

## Edit Appointments

### To edit an appointment:

1. Click the appointment you want to edit.
2. Update the registration number or mileage.
3. Click the icon to update the selected service or repairs. Click **Save**.
4. Click the icon to remove a selected repair.
5. If there is no service required, select the **No scheduled service** checkbox.
6. Click the icon to update the transportation option. Click **Save**.
7. Update the date and time of the drop-off and pick-up of the vehicle.
8. Click **Save**.

- If you update the **VIN**, **Year**, **Model**, **Series** or **Body and Engine**, any service or repairs will need to be reselected.
- The email address entered when creating the appointment cannot be edited.
- To cancel the appointment, open the appointment and click **Cancel Appointment**.

## Search for Appointments

### To search for an appointment:

1 Enter your search criteria in the **Search** field on the **Appointments** screen.

You can search by appointment number, customer name, service advisor or VIN.


2 Click the icon.

The search results and the status of the appointment will be displayed.

- Search results cannot be selected in the Search Results view.

## Record Customer Arrival

### To indicate that a customer has arrived:

1 Find the appointment on the **Appointments** screen.

2 Click the icon.

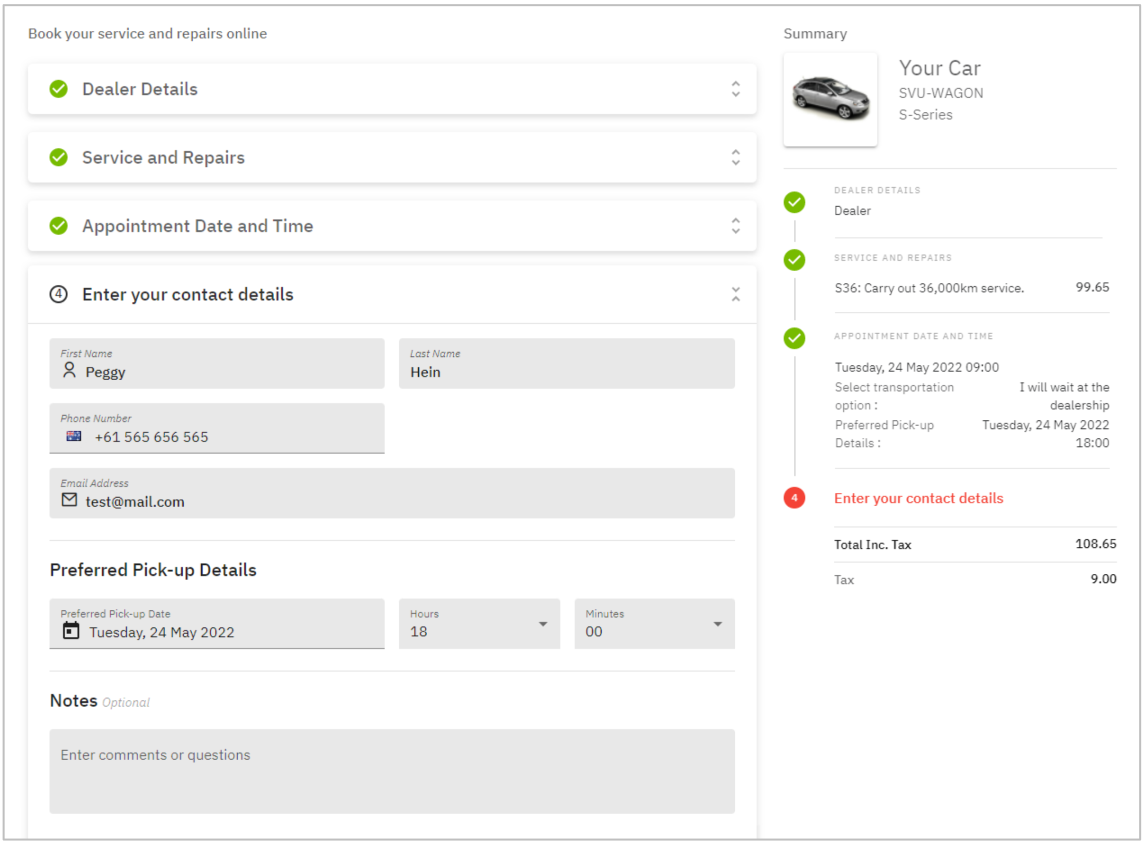
The tile display will be updated.


- This option is only available if the customer has created the appointment.
- You can click the icon again to indicate that the customer has not arrived.

# Customer Portal

Once the Customer Portal has been published to the dealer or distributor website, customers can book a service or repair online.

Once an appointment has been created, a confirmation message is displayed and an email is sent directly to the customer. The system is automatically configured to send the customer a reminder email 48 hours before the appointment.




- Confirmation emails are automatically sent to the customer and the dealer.
- Customers can cancel and edit appointments and a notification email will be sent to the dealer.
- The display of the Customer Portal may differ based on your requirements.

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