



SUPERSERVICE CONNECT

Settings Guide

Contents

Introduction	2
Superservice Connect	2
Dashboard	3
Booking Templates	4
Booking Management	5
Scheduling Options	5
Weekly Schedule	6
Customer Portal Settings	8
General Settings	8
Transportation Options	9
Appointment Options	10
Dealer and Employee Settings	11
Employee Management	11
Group Management	12
Role Management	14
General Settings	15
Edit Contact Details	15
Edit Opening Hours	15
Change Map Location	16
Appointments	17
View Appointments	18
Create Appointments	18
Edit Appointments	19
Search for Appointments	20
Record Customer Arrival	20
Customer Portal	21

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 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.

Booking Management

Scheduling Options

Minimum lead time for bookings (hours)    Minimum lead time for modifications or cancellations (hours)  

Weekly Schedule

Monday	Tuesday	Wednesday	Thursday
<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div> <p>Default ×</p> <p>07:00 - 18:00</p> <p>1 hrs · Services per time slot - 1</p> <p>Edit</p> </div> </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div> <p>Default ×</p> <p>07:00 - 18:00</p> <p>1 hrs · Services per time slot - 1</p> <p>Edit</p> </div> </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div> <p>Default ×</p> <p>07:00 - 18:00</p> <p>1 hrs · Services per time slot - 1</p> <p>Edit</p> </div> </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div> <p>Default ×</p> <p>07:00 - 18:00</p> <p>1 hrs · Services per time slot - 1</p> <p>Edit</p> </div> </div>
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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.

The screenshot displays the 'Weekly Schedule' interface. It is organized into two rows of cards, each representing a day of the week. The top row includes Monday, Tuesday, Wednesday, and Thursday. The bottom row includes Friday, Saturday, and Sunday. Each card shows a selected template (e.g., 'Weekday Template' or 'Saturday Template') with details such as the time slot (08:00 - 16:00) and the number of services per time slot (3). An 'Edit' button is visible on each card. The Sunday card is labeled 'Closed for Bookings' and also has an 'Edit' button.

- ▶ 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.

Holidays and Other Special Days			
Date	Template		
25 December 2021	Closed for Bookings		
26 December 2021	Closed for Bookings		
1 January 2022	Closed for Bookings		

- ▶ 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**

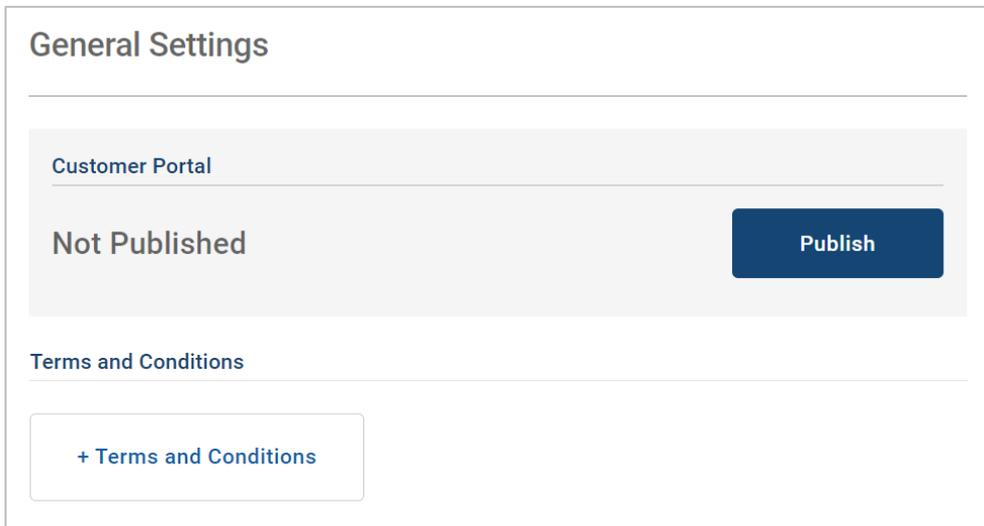
General Settings

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.



The screenshot shows the 'General Settings' interface. At the top, the title 'General Settings' is displayed. Below it, there is a section titled 'Customer Portal'. In this section, the text 'Not Published' is shown on the left, and a dark blue 'Publish' button is on the right. Below the 'Customer Portal' section, there is another section titled 'Terms and Conditions'. In this section, there is a button labeled '+ Terms and Conditions'.

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.

Appointment Options

Service Packages

- Make service package selection mandatory to customers
- Show prices of service packages to customers

Repairs

- Allow customers to select repair operations
- Show prices of repairs to customers

Service Advisors

- Allow customers to select a specific service advisor
- Make service advisor selection mandatory to customers

Appointments

- Allow customers to view/edit appointments

Appointment Time

- Allow customers to arrive at the booking start time
Example - We look forward to welcoming you at our dealership at [x] on [y].
- Allow customers to arrive any time during the booking time slot
Example - We look forward to welcoming you at our dealership between [x] and [y] on [z].

Notifications

Lead time for booking reminders

This is the time frame within which booking reminders are sent to customers.

48 hrs

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).

Employee Management		
Items: 6 + Add <input type="text" value="Search"/>		<input checked="" type="checkbox"/> All users <input checked="" type="checkbox"/> System users
↑ Name	Email Address	Role
Brenda Green Administrator	BGreen@ifm.com	Service
Tyler Cooper Administrator	TCooper@ifm.com	Service
Arthur Lee System user	Alee@ifm.com	Technician
Michael Young System user	MYoung@ifm.com	Technician
Adrian Brinkmann Administrator	Abrinkmann@ifm.com	Service

Results per page: 15 ▾ 1-5 of 5 < >

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.

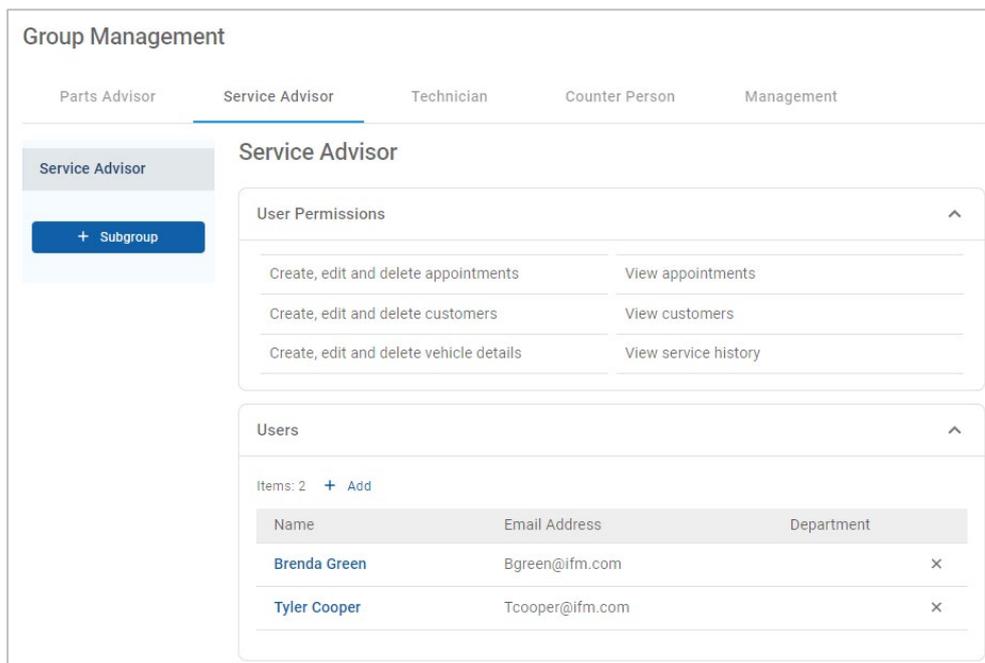


A screenshot of a dropdown menu with the text 'Users' and a downward-pointing arrow on the right side.

- 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**.



The screenshot shows the 'Group Management' interface. At the top, there are tabs for 'Parts Advisor', 'Service Advisor', 'Technician', 'Counter Person', and 'Management'. The 'Service Advisor' tab is selected. On the left, there is a sidebar with a 'Service Advisor' section containing a '+ Subgroup' button. The main content area is titled 'Service Advisor' and contains two sections: 'User Permissions' and 'Users'. The 'User Permissions' section lists six permissions: 'Create, edit and delete appointments', 'View appointments', 'Create, edit and delete customers', 'View customers', 'Create, edit and delete vehicle details', and 'View service history'. The 'Users' section shows 'Items: 2 + Add' and a table with two users: 'Brenda Green' (Email: Bgreen@ifm.com) and 'Tyler Cooper' (Email: Tcooper@ifm.com). Each user has an 'x' icon next to their name.

- ▶ 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 **X** 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.

The screenshot displays the 'Group Management' interface. At the top, there are tabs for 'Parts Advisor', 'Service Advisor', 'Technician', 'Counter Person', and 'Management'. The 'Service Advisor' tab is selected. On the left, a sidebar shows 'Service Advisor' and 'Service Subgroup' with a '+ Subgroup' button. The main area shows 'User Permissions' with an 'Edit' icon and 'View appointments' with a search bar. Below that, the 'Users' section shows 'Items: 1 + Add' and a table with one user: Adrian Brinkmann, with email address ABrinkmann@ifm.com and a close icon.

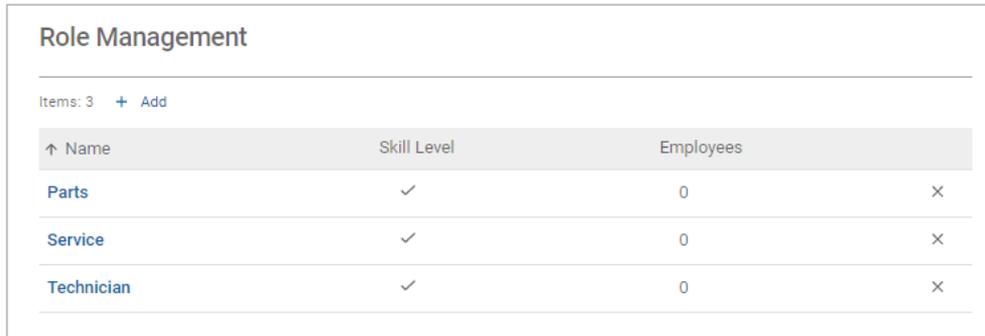
Name	Email Address	Department
Adrian Brinkmann	ABrinkmann@ifm.com	

- ▶ 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**



Role Management

Items: 3 + Add

↑ Name	Skill Level	Employees	
Parts	✓	0	×
Service	✓	0	×
Technician	✓	0	×

- ▶ 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

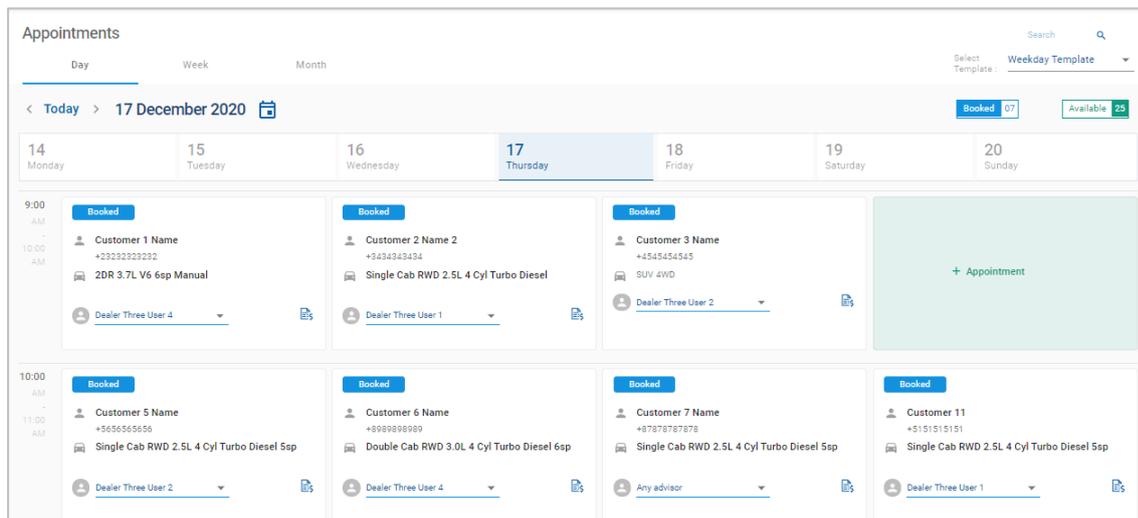
To change the location on the map:

- 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  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.

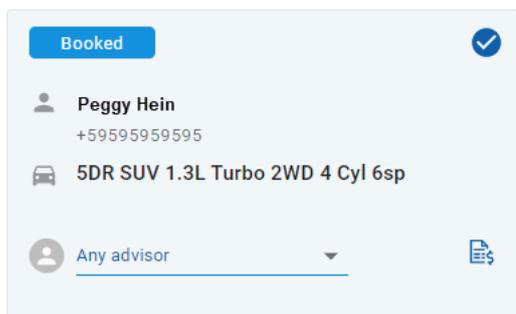
- ▶ Search results cannot be selected in the Search Results view.

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.

Book your service and repairs online

✔ Dealer Details

✔ Service and Repairs

✔ Appointment Date and Time

④ Enter your contact details

Preferred Pick-up Details

Preferred Pick-up Date

Hours

Minutes

Notes Optional

Summary

Your Car
SVU-WAGON
S-Series

✔ DEALER DETAILS
Dealer

✔ SERVICE AND REPAIRS
 S36: Carry out 36,000km service. 99.65

✔ APPOINTMENT DATE AND TIME
 Tuesday, 24 May 2022 09:00
 Select transportation option : I will wait at the dealership
 Preferred Pick-up Details : Tuesday, 24 May 2022 18:00

④ Enter your contact details

Total Inc. Tax 108.65

Tax 9.00

- ▶ 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.

INFOMEDIA™