

GETTING STARTED GUIDE

To get started access the Appointment Manager within the service quoting system or directly from the start screen.

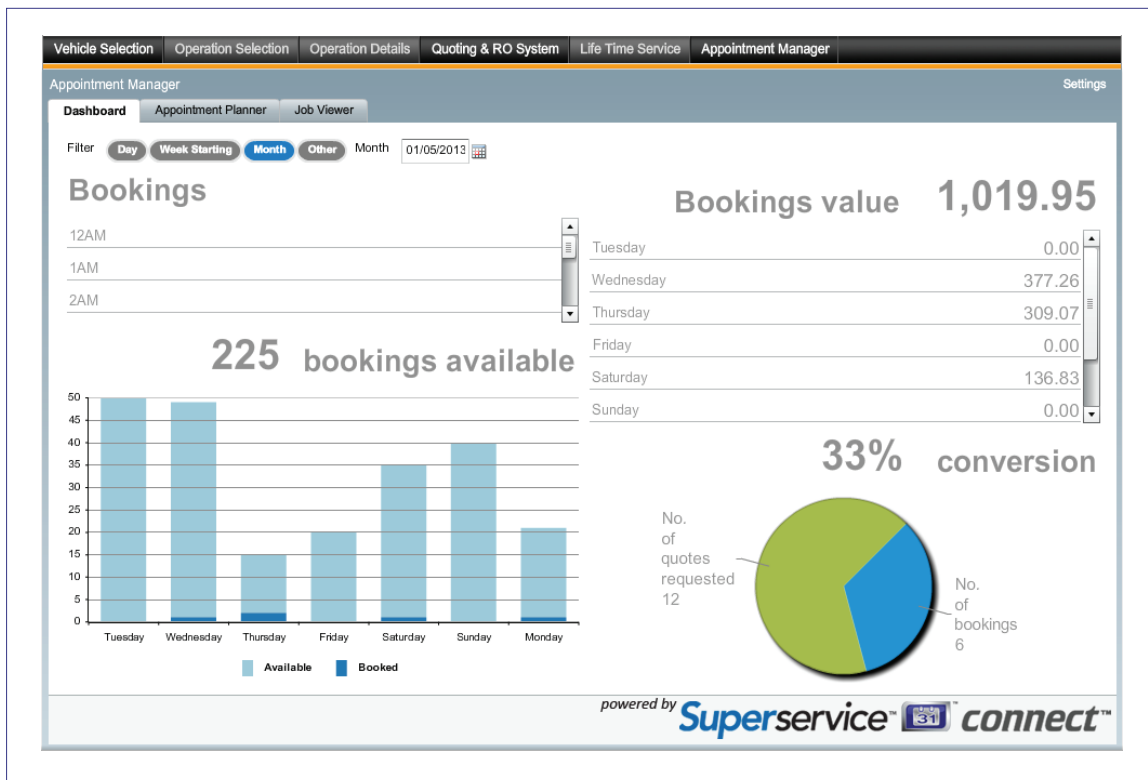


INTRODUCTION

The innovative online booking system allows customers to book vehicle services anytime enhancing customer convenience and dealership productivity.

To get started, follow the steps below:

- Enable Online Bookings
- Set up Appointment Pricing
- Create and Apply Booking Templates
- Set up Email and Transportation Options
- Set up Service Reminders
- Use the Appointment Planner and Job Viewer




For more information on configuring your settings, refer to the Settings Guide.

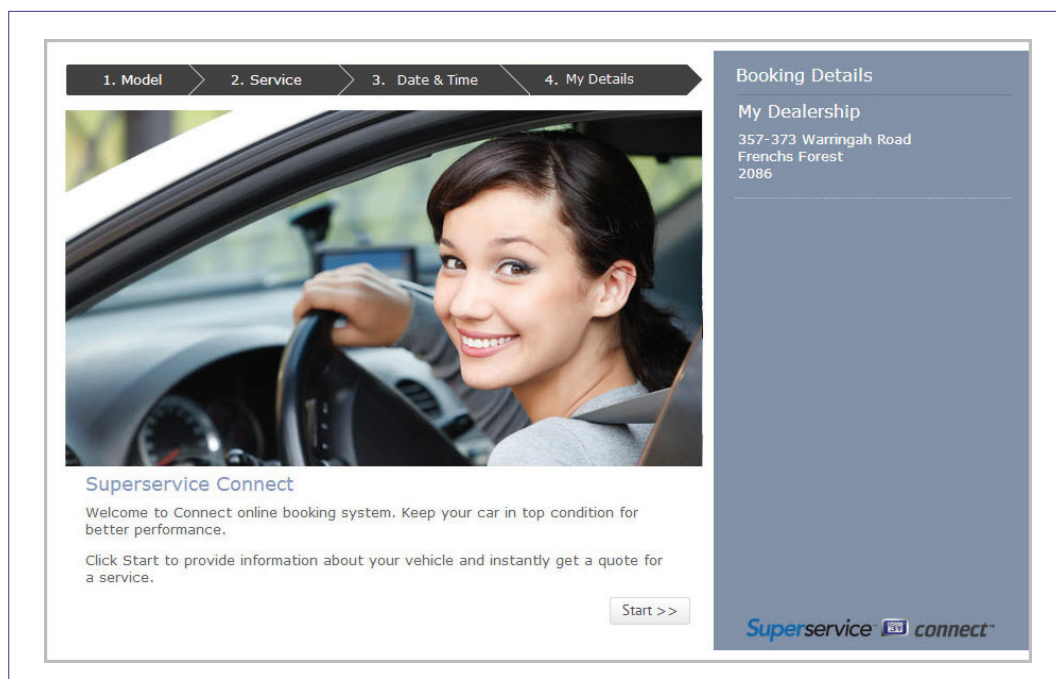


ENABLE ONLINE BOOKINGS

When setting up your online booking system, you must select a parts price level and enable online bookings on your website. Dealers have the option to generate the iFrame code which is used to embed the booking system into their website.*

To enable the booking system:

- 1 Access the **Appointment Manager** from your quoting system or start screen.
 - 2 Click the **Settings** button in the top right corner.
 - 3 Select a parts price level.
 - 4 Select the **Enable Connect Online Bookings** checkbox.
 - 5 Click the  icon to generate the iFrame code.*
 - 6 Copy the iFrame code and provide it to your website administrator.*
Your administrator will embed the booking system into your website.
 - 7 Click **Save**.
- The booking system will not function if any labor rates are set to 0. To access the labor rates, select **Price Settings** from the **Settings** menu.



*These steps will not be required if your distributor is hosting Superservice Connect.

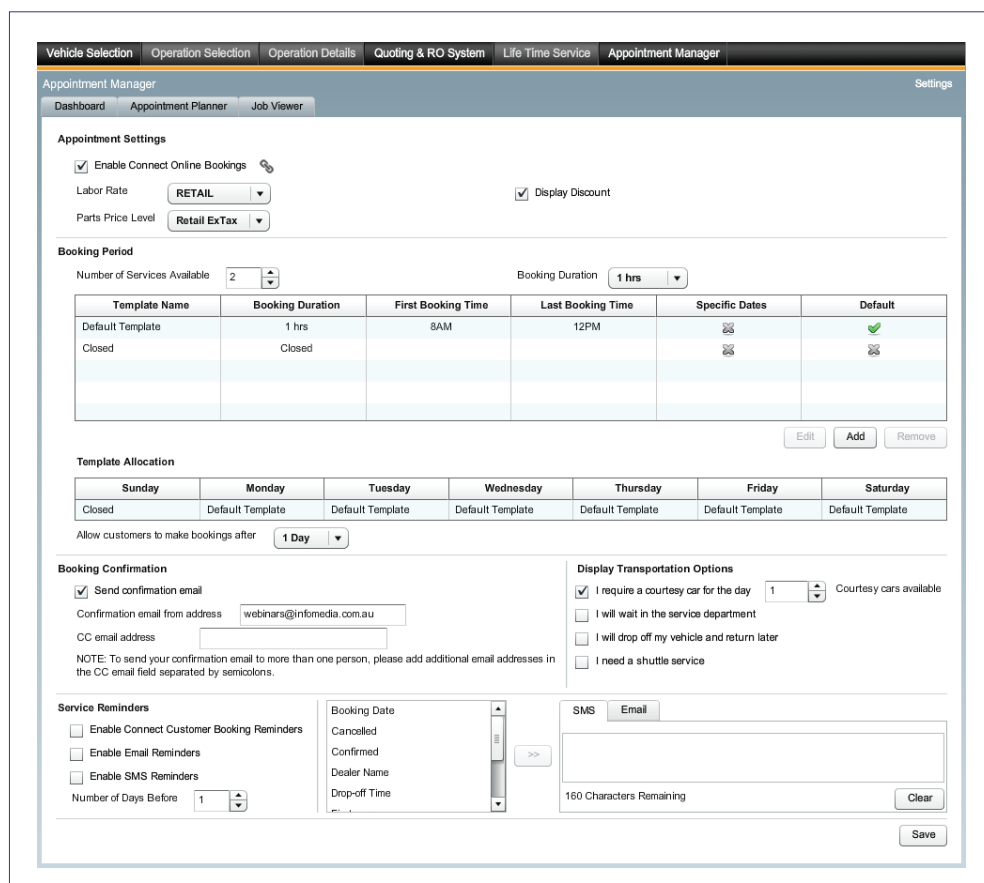


SET UP APPOINTMENT PRICING

The Settings screen allows you to configure important settings for your booking system, such as the pricing of labor and parts. If you have already set up a discounted parts price level in the Price Settings tab, you can choose to display this discount to your customers.

To configure pricing for appointments:

- 1 On the Appointment Manager screen, click the **Settings** button in the top right corner.
- 2 Select the labor rate.
- 3 Select the parts price level.
- 4 If you have selected a discounted parts price level, you can display this discount to the customer by selecting the **Display Discount** checkbox.
- 5 Click **Save**.



The screenshot shows the 'Appointment Manager' settings interface. At the top, there are tabs for 'Vehicle Selection', 'Operation Selection', 'Operation Details', 'Quoting & RO System', 'Life Time Service', and 'Appointment Manager'. The 'Appointment Manager' tab is active, and the 'Settings' sub-tab is selected in the top right corner.

Appointment Settings

- ☒ Enable Connect Online Bookings
- Labor Rate: **RETAIL** (dropdown)
- Parts Price Level: **Retail ExTax** (dropdown)
- ☒ Display Discount

Booking Period

- Number of Services Available: **2** (dropdown)
- Booking Duration: **1 hrs** (dropdown)

Template Name	Booking Duration	First Booking Time	Last Booking Time	Specific Dates	Default
Default Template	1 hrs	8AM	12PM		<input checked="" type="checkbox"/>
Closed	Closed				<input type="checkbox"/>

Buttons: Edit, Add, Remove

Template Allocation

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Closed	Default Template	Default Template	Default Template	Default Template	Default Template	Default Template

Allow customers to make bookings after: **1 Day** (dropdown)

Booking Confirmation

- ☒ Send confirmation email
- Confirmation email from address: **webinars@infomedia.com.au**
- CC email address: [empty field]
- NOTE: To send your confirmation email to more than one person, please add additional email addresses in the CC email field separated by semicolons.

Display Transportation Options

- ☒ I require a courtesy car for the day **1** (dropdown) Courtesy cars available
- ☐ I will wait in the service department
- ☐ I will drop off my vehicle and return later
- ☐ I need a shuttle service

Service Reminders

- ☐ Enable Connect Customer Booking Reminders
- ☐ Enable Email Reminders
- ☐ Enable SMS Reminders
- Number of Days Before: **1** (dropdown)

Booking Date

- Cancelled
- Confirmed
- Dealer Name
- Drop-off Time

SMS / Email

160 Characters Remaining [text area]

Buttons: Clear, Save

► Some features are optional depending on dealership preferences or the configuration of the solution.

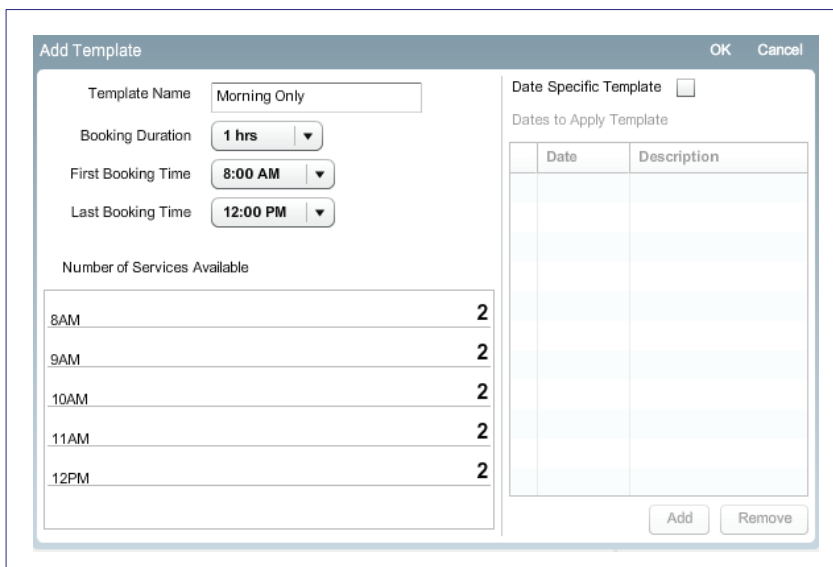


CREATE AND APPLY BOOKING TEMPLATES

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

To create a new template:

- 1 Select the **Number of Services Available** under **Booking Period**.
- 2 Select the **Booking Duration** from the drop-down list under **Booking Period**.
- 3 Click **Add** under the template table.
- 4 Type a name for the template. For example, Morning Only.
- 5 Select the first and last booking times.
- 6 Click **OK**.
- 7 Click **Save**.



The screenshot shows the 'Add Template' dialog box with the following fields and options:

- Template Name:** Morning Only
- Booking Duration:** 1 hrs
- First Booking Time:** 8:00 AM
- Last Booking Time:** 12:00 PM
- Number of Services Available:** A table with 5 rows, each showing a time slot and the number of services available (2).
- Date Specific Template:** ☐
- Dates to Apply Template:** A table with 2 columns: Date and Description.
- Buttons:** Add, Remove, OK, Cancel.

Number of Services Available	
8AM	2
9AM	2
10AM	2
11AM	2
12PM	2

Date	Description

To set up your weekly templates:

- 1 Click the drop-down list under the day of the week and select the template that is relevant for that day.
- 2 Continue to apply the relevant template to each day of the week.
- 3 Click **Save**.

The bookings available on that day will be updated to match the template.

- To edit or delete a template, select the template and click **Edit** or **Remove**.



SET UP EMAIL AND TRANSPORTATION OPTIONS

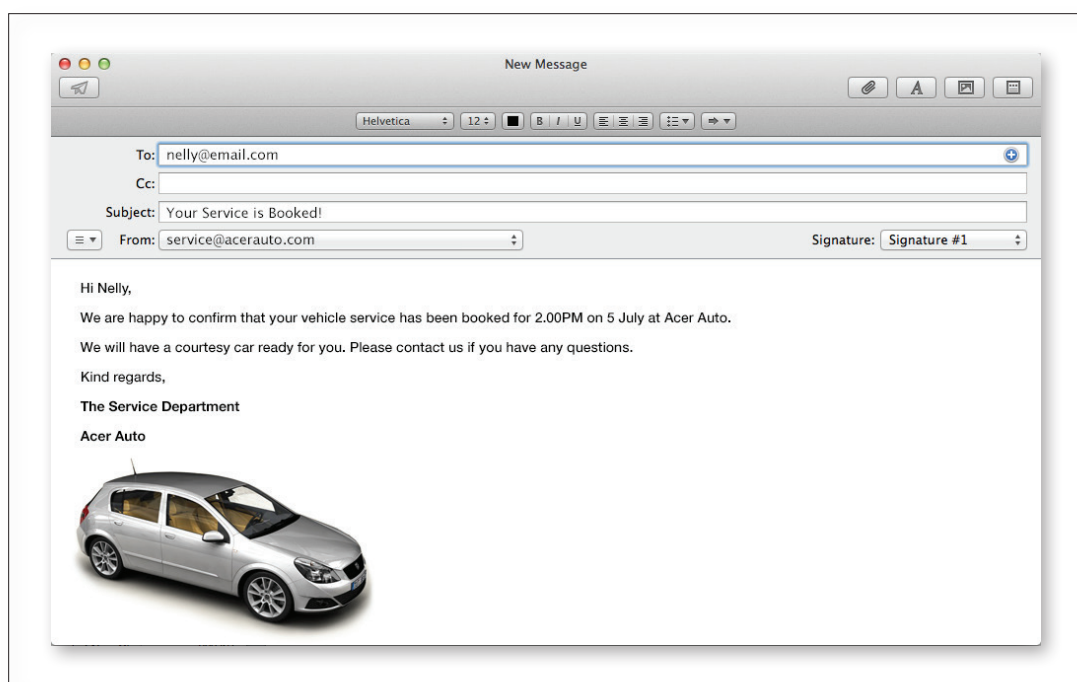
You have the ability to set up booking confirmation emails that are automatically sent to the customer once a booking has been made. You can also set up transportation options such as a courtesy car for the customer.

To set up a booking confirmation email:

- 1 Select the **Send confirmation email** checkbox.
- 2 Type the from email address.
- 3 Type the CC email address.
- 4 Click **Save**.

To display transportation options:

- 1 Select the transportation options you want to display.
- 2 Select the number of courtesy cars that are available, if required.
Once all courtesy cars have been allocated for a given day, customers will not be able to select this option.
- 3 Click **Save**.



- Some features are optional depending on dealership preferences or the configuration of the solution.



SET UP SERVICE REMINDERS

Service reminders allow you to send automated email and SMS reminders to customers at a chosen time to remind them of their service booking.

The reminder message can be personalized for each customer, using variable fields that draw information from the Superservice database.

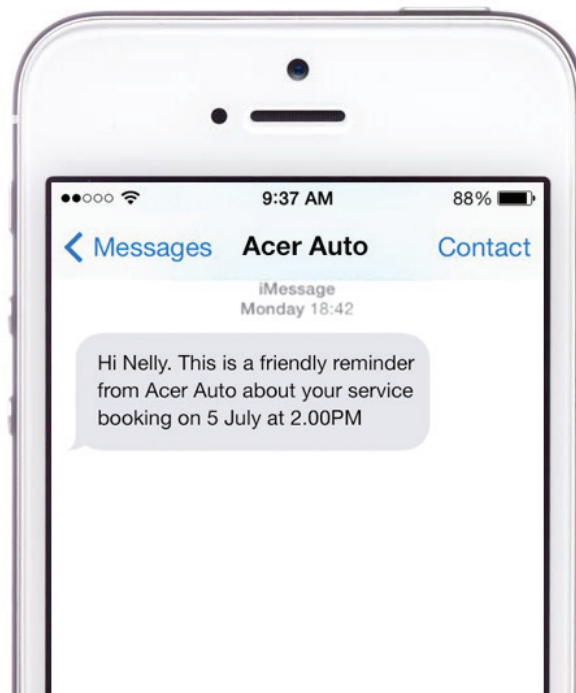
You can add two types of variables to service reminders:

- **Data variables:** Data variables draw information from the Superservice database in order to personalize the message for the customer. For example, First name, Date and Time.
- **Action buttons:** Action buttons insert clickable text in the email, that will perform an action and send a message back to the service quoting system. For example, Confirm and Reschedule.

To enable service reminders:

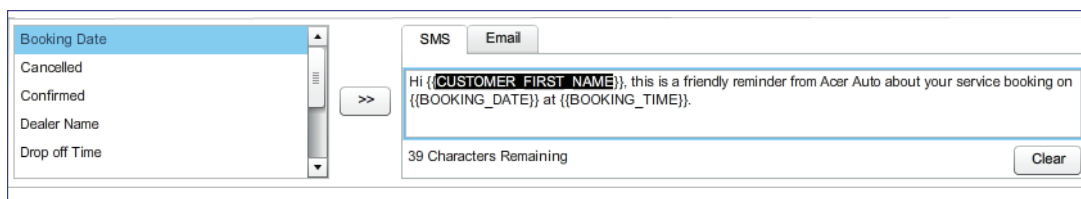
- 1 Select the **Enable Connect Customer Booking Reminders** checkbox.
- 2 Select the **Enable Email Reminders** checkbox.
- 3 Select the **Enable SMS Reminders** checkbox.
- 4 Select how many days before the booking the reminder will be sent.

For example, if 1 day is selected, the reminder will be sent 24 hours before the service booking.



To create a service reminder:

- 1 Click the **SMS** or **Email** tab.
- 2 Type a reminder message. For example:
Hi, this is a friendly reminder from Acer Auto about your service booking.
- 3 To personalize the reminder, click in the message, select a variable from the variable list, and click the **>>** button.
For example, if you add the **First name** variable, the customer's first name will be added to the message.



Variables will be displayed between curly brackets:

Hi {{CUSTOMER_FIRST_NAME}}. This is a friendly reminder from Acer Auto about your service booking on {{BOOKING_DATE}} at {{BOOKING_TIME}}.

The above example will result in the following reminder message:

"Hi **Nelly**. This is a friendly reminder from Acer Auto about your service booking on 5 July at 2.00PM."

- 4 Click **Save**.



CREATE APPOINTMENTS

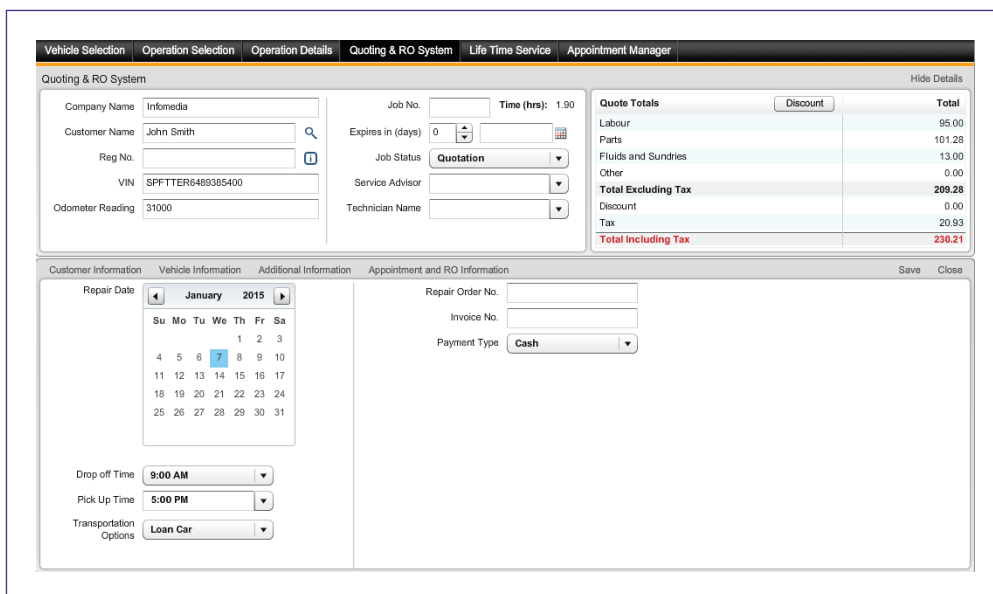
The service quoting system offers the ability to schedule bookings directly from the Quoting and RO System and save them into the Appointment Manager.

Confirmation emails and service reminders will be sent to the customer, depending on dealership preferences or the configuration of the solution.

To create appointments:

- 1 Append a quote into the Quoting and RO System screen.
- 2 Click **Create Appointment** on the Quoting and RO System screen.
- 3 Select the repair date from the calendar.
- 4 Select the drop off time for the vehicle.
- 5 Select the pick up time for the vehicle.
- 6 Select the transportation option (if required).
- 7 Click **Save**.

The appointment will be displayed in the Appointment Manager screen.



The screenshot displays the 'Quoting & RO System' interface. The top navigation bar includes tabs for Vehicle Selection, Operation Selection, Operation Details, Quoting & RO System (active), Life Time Service, and Appointment Manager. The main form is divided into several sections:

- Customer Information:** Fields for Company Name (Infomedia), Customer Name (John Smith), Reg No., VIN (SPFTTER6489385400), and Odometer Reading (31000).
- Job Details:** Fields for Job No., Time (hrs) (1.90), Expires in (days) (0), Job Status (Quotation), Service Advisor, and Technician Name.
- Quote Totals:** A table showing the breakdown of costs.

	Discount	Total
Labour		95.00
Parts		101.28
Fluids and Sundries		13.00
Other		0.00
Total Excluding Tax		209.28
Discount		0.00
Tax		20.93
Total Including Tax		230.21
- Appointment and RO Information:** Fields for Repair Order No., Invoice No., and Payment Type (Cash).
- Repair Date:** A calendar for January 2015 with the 7th selected.
- Drop off Time:** 9:00 AM
- Pick Up Time:** 5:00 PM
- Transportation Options:** Loan Car

Buttons for 'Save' and 'Close' are located at the bottom right of the form.





- If a valid email address or contact number has not been entered, you will be prompted to enter the correct details.



USE THE APPOINTMENT PLANNER

The Appointment Planner provides a calendar view of your bookings, and allows you to update booking availability if necessary. You can filter the bookings by day, week or month.

Bookings are displayed in the following ways:

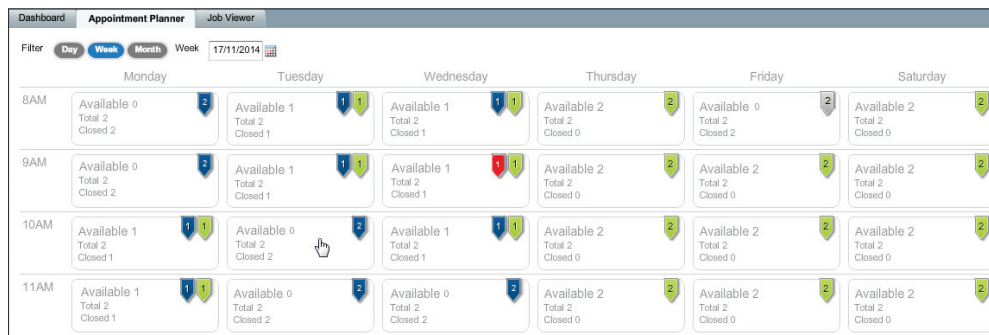
-  Green indicates the number of available bookings.
-  Blue indicates the number of confirmed bookings.
-  Grey indicates that the time slot is closed for that day.
-  Red indicates the number of bookings made which include recall work.

To view bookings for a day:

- 1 Click **Day** and select the date from the calendar.
- 2 View bookings for the entire day.
- 3 If you want to change the Booking Action, click on the time slot and select from the drop-down list and click **Apply**. For example, change to Closed.
- 4 Click **Save**.

To view bookings for a week:

- 1 Click **Week** and select the start date from the calendar.
- 2 View the bookings for the entire week.
- 3 If you want to view the booking details, click on the day and time slot.



	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
8AM	Available 0 Total 2 Closed 2	Available 1 Total 2 Closed 1	Available 1 Total 2 Closed 1	Available 2 Total 2 Closed 0	Available 0 Total 2 Closed 2	Available 2 Total 2 Closed 0
9AM	Available 0 Total 2 Closed 2	Available 1 Total 2 Closed 1	Available 1 Total 2 Closed 1	Available 2 Total 2 Closed 0	Available 2 Total 2 Closed 0	Available 2 Total 2 Closed 0
10AM	Available 1 Total 2 Closed 1	Available 0 Total 2 Closed 2	Available 1 Total 2 Closed 1	Available 2 Total 2 Closed 0	Available 2 Total 2 Closed 0	Available 2 Total 2 Closed 0
11AM	Available 1 Total 2 Closed 1	Available 0 Total 2 Closed 2	Available 0 Total 2 Closed 2	Available 2 Total 2 Closed 0	Available 2 Total 2 Closed 0	Available 2 Total 2 Closed 0

To view bookings for a month:

- 1 Click **Month** and select the start date from the calendar.
- 2 View bookings for the entire month.
- 3 If you want to view details, click on a specific day.
- 4 If you want to change details, select from the drop-down lists and click **Apply**.
You can only make changes on days that have no customer bookings.
- 5 Click **Save**.



USE THE JOB VIEWER

The Job Viewer allows you to filter or search your bookings, or send them to the Quoting & RO System to be saved, printed or emailed.

To search by customer or vehicle details:

- 1 Enter the customer or vehicle details.
- 2 Click **Search**.
- 3 If you want to open the job, select it.
The job will open displaying the full quote.

To filter by time frame:

- 1 Click **Day**, **Week** or **Month** and enter a start date.
Or, click **Other** and specify the From and To dates.
- 2 Click **Search**.
- 3 If you want to open the job, select it.
The job will open displaying the full quote.

Vehicle Selection

Operation Selection

Operation Details

Quoting & RO System

Life Time Service

Appointment Manager

Appointment Manager

Settings

Dashboard

Appointment Planner

Job Viewer

Customer (Name, Address, Phone)

Vehicle (VIN, Reg. No.)

Filter

Month

Day

Week

Month

Other

18/11/2014

Delete Selected Appointment

Search

Quote No.	Customer	Contact Details	Reg No. / VIN	Vehicle	Operation	Labour Time	Booking Time	Repair Date	Price	Callback	Status	Transportation Options
002	Jillian Meagher	039485845 jillian@yahoo.com	ABB789	Cerato GLS 4i	S37.5i Carry out 37,500km inter	0.50hrs	10:00 AM	18/11/2014	41.67	No	Pending	Loan Car
003	Jill Hampdon	0403987987 jill@gmail.com	JIL100	Carnival GL 5i	S10 Carry out 10,000km serv	1.0hrs	11:00 AM	19/11/2014	66.57	No	Pending	Loan Car
004	Jeremy Sutton	84384385 jsutton@gmail.com	JST000	Carnival GL 5i	S15 Carry out 15,000km serv	1.2hrs	10:00 AM	20/11/2014	77.57	No	Pending	
005	Peter Hill	0989765765 peter@gmail.com	ATL123	Carnival GLS 5i	S30 Carry out 30,000km serv	1.6hrs	11:00 AM	26/11/2014	184.57	Yes	Pending	Loan Car
006	Jack Johnson	8769876554 jack@gmail.com	ABC889	Grand Carniva	S60K48M Carry out 60,000km/48 h	2.4hrs	10:00 AM	21/11/2014	433.71	No	Pending	

If you need assistance or have any questions, please contact Customer Service.