

# GETTING STARTED GUIDE

The online, mobile-friendly inspection-based selling system, enables service staff to identify, price and recommend additional repair work.

## JOBS TODAY

The Jobs Today screen displays all the dealership's appointments for the day and enables you to track and manage all your jobs.

The screenshot shows the KIA CVIS Jobs Today screen. It features a top navigation bar with tabs for Jobs Today, New Job, Reports, and Follow-ups. Below the navigation bar is a search and filter section. The main area displays a grid of job tiles, each representing a different workflow stage. A hand icon points to the 'Vehicle Arrived' tile, which is highlighted with a blue circle and the number 5. Other callouts include: 1 (Jobs Today tab), 2 (Search bar), 3 (Filter by dropdown), 4 (Workflow step names), 6 (Log Out button), and 7 (Views icon).

Appointments	Vehicle Arrived	Workshop	Parts	Awaiting Authorization	Ready for Pickup	Vehicle Delivered
6666666 George Papas ABC123	225 Pablo Fernandez MT12GZF 04/04/2016	205 Isabella Ferrante CDG73W	6666671 Elena Gallo DY9882	208 Elise Olsson 744TFV	6666669 Alfonso Cremona ABC123	207 Don Djokovic CNN22N
6666665 Jean Rufin MT12GZF	959598 Takashi Fumigawa 123456	219 Monique Forget 123456	204 Amelia Johnson AUN12B	22 Anika Sharapov BG37NM	209 Maria Ruuska BG37NM	
6666670 Peter Traub BG37NM6	202 Penny Jones ZDY988	210 Kurt Mueller B1165N	206 Brad Besant CMK08A Tuesday at 9:15 AM	949494 Lisa Coles ADT022	17 Bonnie Gillett CNN22N	
	124000 Sven Holdgerson 104MSG	6666663 Celine Bertrand CSO77C	171717 Jose Garcia S603AGD		13 Francisco Nunez LJR062	

The options displayed may vary based on the workflow of your dealership.

- 1 Access the main screens such as Jobs Today, New Job, Reports, and Follow-ups.
- 2 View inline help tips that are enabled in User Settings.
- 3 Search for a job or filter jobs by flag or employee.
- 4 Access jobs imported from your DMS and monitor job progress.
- 5 Tap a job to open and view customer and vehicle details.
- 6 Access the Settings screens.
- 7 Display the Jobs Today screen in Tile, List or Calendar view.

### GOOD TO KNOW:

- To return to the Tile or List view, tap the or icon.
- To expand the jobs in the List view, tap the workflow step name or the icon.
- To show more information on each tile, tap the icon.





## PERFORM THE DRIVEWAY INSPECTION

The driveway inspection is carried out on a mobile device by the Service Advisor while the customer is checking in their vehicle. This is an optional step and may not be available at all dealerships.

### To perform a driveway inspection:

- 1 Tap the job you want from the **Jobs Today** screen.
- 2 Select the Service Advisor and complete the customer details such as email address, mobile number, odometer and annual mileage.
- 3 Add any comments from the customer in the **Notes** box.
- 4 Work through the inspection form while inspecting the vehicle. Tap a coloured box that best matches the condition of each section.

☒ Not checked (if applicable)

☒ Work is required soon

☒ No work is required

☒ Work is urgently required
- 5 If additional work is required, select the operation from the drop-down.
- 6 Complete the **Tyres** section.

Select the brand and size

Report a damaged tyre

Enter the tread depths

Add a note for the tyre
- 7 Complete the **Bodywork** section.

Tap to record an issue

Add a photo

Select an issue

Change to text input
- 8 Request the customer to provide a digital signature and tap **Accept**.
- 9 Tap **Next Workflow Step** to move the job to the next step in the process.

### GOOD TO KNOW:

- Tap **+** to add another operation to a section.
- If you can't find a specific operation, tap **T** and type the details.
- If the tyres are wearing evenly, enter the middle tread depth first.
- Tap **Copy** to copy the tyre brand and size to all tyres.



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## PERFORM THE TECHNICAL INSPECTION

The technical inspection is performed on a mobile device by the Technician. In some cases the Service Advisor may have carried out a driveway inspection and information in the tyre and bodywork reports may be completed.

### To perform a technical inspection:

- 1 Tap the job you want from the **Jobs Today** screen.
- 2 Select the Technician and confirm the odometer reading.
- 3 Read any comments from the customer in the **Notes** box.
- 4 Work through the inspection form while inspecting the vehicle. Tap a coloured box that best matches the condition of each section.

<input checked="" type="checkbox"/> Not checked (if applicable)	<input checked="" type="checkbox"/> Work is required soon
<input checked="" type="checkbox"/> No work is required	<input checked="" type="checkbox"/> Work is urgently required
- 5 If additional work is required, select the operation from the drop-down.
- 6 Use the icons to complete the detailed inspection.

Add an operation	Add a photo or video
Change to text input	Delete an operation
- 7 Tap the **Tyres** tab and confirm the condition of the tyres has been recorded.
- 8 Tap the **Bodywork** tab and confirm that any vehicle damage has been recorded.
- 9 Select the next **Workflow Step** to move the job to the next step in the process.

### GOOD TO KNOW:

- To search for jobs on the **Jobs Today** screen, use the search box or icon.
- The icons on the **Inspection** tab indicate the number of identified issues.
- Tap the image thumbnail to view a larger version of the photo or video.





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## CONFIRM PRICING AND AVAILABILITY

When the additional work has been identified, the parts availability and pricing can be confirmed. Depending on your level of DMS integration, the part availability information may be automatically displayed.

### To confirm parts availability and pricing:

- 1 Tap the job you want from the **Jobs Today** screen.
- 2 Select the Parts Advisor and review the additional work that has been identified on the **Quote** tab.
- 3 Confirm any information entered by the Technician in the Inspection or Tyres tab.
- 4 Tap  or the operation name to see the operation and pricing details.
- 5 Select the part availability from the **SOH** drop-down and confirm the parts pricing.
- 6 Add prices manually for any unpriced parts (if required).
- 7 Select the green tick  to confirm the change.
- 8 If you need to add more items, select from the **Add Item** drop-down and fill in the details.
- 9 Select the next **Workflow Step** to move the job to the next step in the process.

### GOOD TO KNOW:

- The  icon indicates a validated VIN which ensures automatic quoting from Menus.
- Tap the  icon on the **Jobs Today** screen to indicate that parts are required.
- If you have DMS integration, tap **Price Operations** to get pricing from your DMS.



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## REVIEW THE INSPECTION REPORT

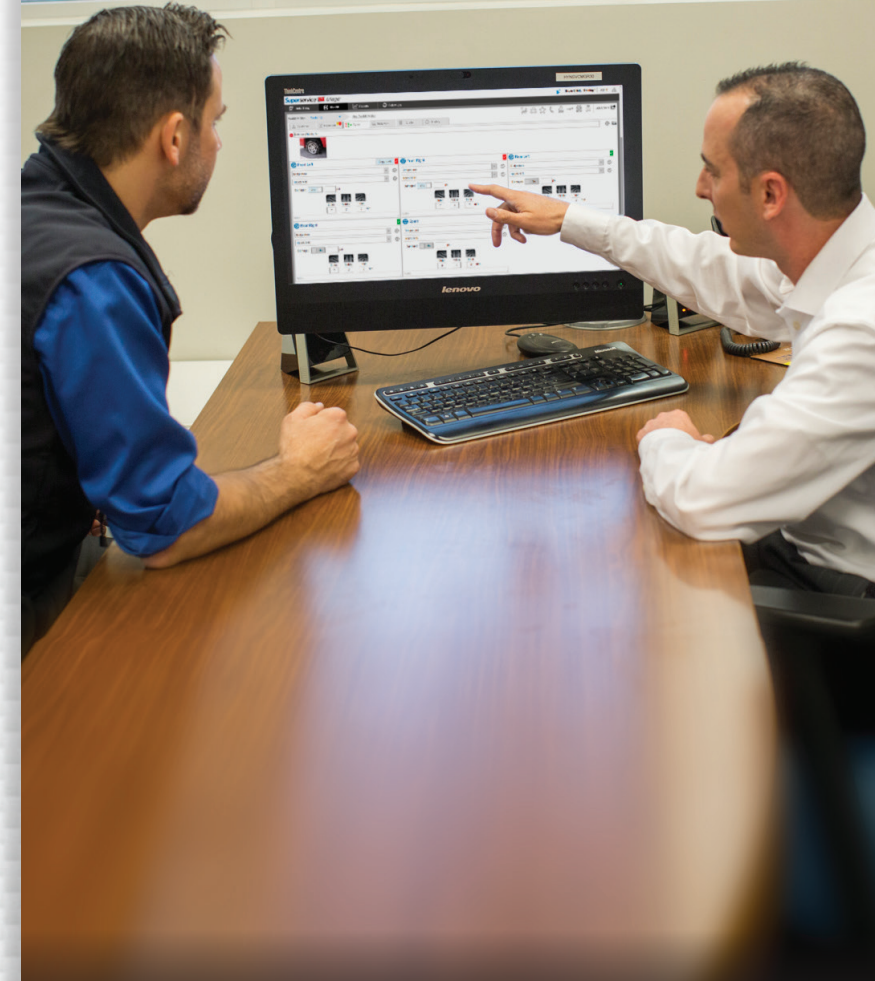
When the parts pricing and availability has been confirmed the job can be reviewed prior to gaining authorisation from the customer.

### To review the inspection report:

- 1 Tap the job you want from the **Jobs Today** screen.
- 2 Confirm all the required customer and staff information has been completed.
- 3 Select the **Inspection**, **Tyres** and **Bodywork** tabs to confirm the forms have been completed correctly.
- 4 Review any attached photos or videos and delete (if required).
- 5 Tap  or the operation name to see the operation and pricing details.
- 6 Ensure that all labour times for the additional work have been added correctly.
- 7 Review the availability of parts displayed in the **SOH** column.
- 8 Select the next **Workflow Step** to move the job to the next step in the process.

### GOOD TO KNOW:

- The   icons on the Inspection tab indicate the number of identified issues.
- The    icons on the Tyres tab indicate the condition of each tyre.
- Tap the image thumbnail to view a larger version of the photo or video.



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## AUTHORISE THE WORK

When the labour and parts have been priced and the inspection report has been reviewed the Service Advisor can obtain the customer's authorisation to perform the additional work.

### To authorise the additional work:

- 1 Tap the job you want from the **Jobs Today** screen.
- 2 Review the additional work which has been identified on the **Quote** tab.
- 3 Tap  or the operation name to see the operation and pricing details.
- 4 Confirm part availability and pricing for each work item.
- 5 Contact the customer and request authorisation for each work item.
- 6 Select from the **Authorisation Status** drop-down to record the customer responses.
- 7 If any work is not authorised select a reason for the declined work from the drop-down, then select a follow-up date.
- 8 Record the details in the **Customer Authorisation** box.
- 9 Select the next **Workflow Step** to move the job to the next step in the process.  
Eg: Workshop Control or Parts.

### GOOD TO KNOW:

- Tap **Job Actions**  to request authorisation online.
- Work that has been authorised online is indicated with the  icon.
- Tap the  icon on the **Jobs Today** screen to indicate that parts are required.






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## FINALISE THE JOB

The mobile-based inspection system gives full visibility for all jobs in your dealership so that once the additional work has been authorised, each department can access the job and get on with the required work without delay.

### To view the authorisation status and finalise a job:

- 1 Locate the job you want on the **Jobs Today** screen.
  - Work that has been authorised online is indicated with the  icon.
  - Jobs that are waiting for parts are displayed with a  icon.
- 2 Tap the job to open it and review the additional work which has been identified on the **Quote** tab.
- 3 Confirm the status of the additional work in the **Authorisation Status** column.
  - **Pending Authorisation:** The work is not yet authorised.
  - **Authorised:** The work has been authorised.
  - **Warranty:** The work is covered under warranty.
  - **Not Authorised:** The work has not been authorised.
  - **Pre-booked:** The work the vehicle was booked in for.
- 4 Tap  or the operation name to update or confirm the part availability.
  - Parts staff can pick parts for the Technicians.
  - Technicians can complete the authorised work on the vehicle.
  - Service Advisors can set a next service reminder on the **Customer** tab.
- 5 When the work is completed, move the job to the next workflow step. Eg: Road Test.

### GOOD TO KNOW:

- A next service reminder can be set in the **Customer** tab.
- To print the inspection report for the customer, tap **Job Actions** .
- When the customer has picked up their vehicle, move the job to the final workflow step.



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## PERFORM FOLLOW-UPS

The Follow-ups screen enables you to follow up with customers on any recommended work that was declined at the time of the vehicle inspection.

This feature will only display for those who have the relevant permissions.

### To follow up on declined work:

- 1 Tap the **Follow-ups** tab and locate the follow-up you require.
- 2 Tap the  icon to review the details of the follow-up.
- 3 Tap **Open Quote** to review the job history and quote prior to contacting the customer.
- 4 Identify the work that was not authorised and familiarise yourself with the reason the work was declined.
- 5 Tap the **Follow-ups** tab again to return to the follow-up information.
- 6 Contact the customer to request authorisation for the declined work.
- 7 Select the checkbox for each line item in the follow-up and record the response from the drop-down.
  - **Accept:** Select **Accept** to accept the work or **Accept and Create Appointment** to book the work in.
  - **Decline:** Select the reason why the work was declined, then tap **Decline**.
  - **Reschedule Follow-up:** Select a new follow-up date and tap **Reschedule Follow-up**.
- 8 When follow-ups are accepted or declined they are automatically moved to the **Completed Follow-ups** tab.

### GOOD TO KNOW:

- Use the **Email Reminder** or **SMS Reminder** buttons to follow up directly with customers.
- The **SMS Reminder** feature is optional based on your subscription.
- To filter the follow-ups, use the filter drop-down or the calendar options.



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