SUPERSERVICE TRIAGE

Settings Guide

Contents

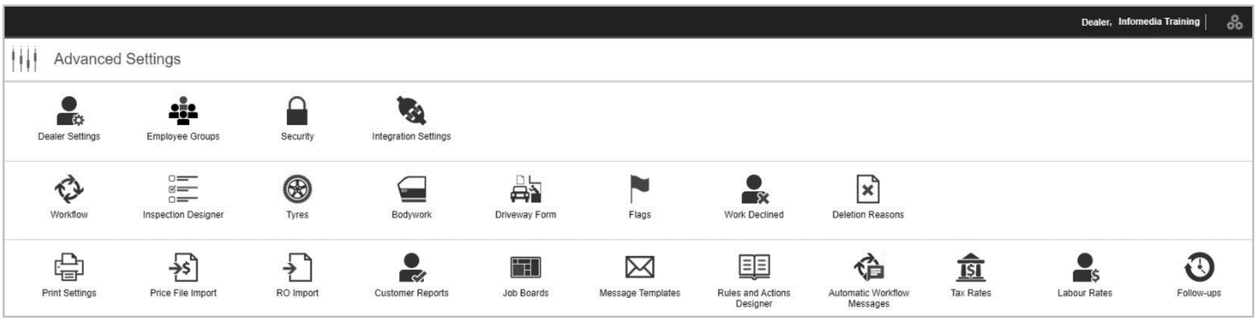
Introduction

The Advanced Settings screen is customised specifically for each user based on the security permissions that have been applied within the application and their product subscription offerings.

This guide is divided into the following sections:

- User Settings
- Basic Settings
- Job Management Settings
- Special Features Settings

To access the Advanced Settings screen, click the icon and select **Advanced Settings**.



To navigate through the Advanced Settings screens, use the following buttons:

- **Edit**: Allows you to edit the page content.
- **Save**: Saves the changes.
- **Cancel**: Does not save the changes.
- **Back**: Takes you back a screen.
- **Home**: Sends you back to the Advanced Settings screen.
- **Delete**: Deletes the content.

- To return to the Jobs today screen, select the icon.
- The options available in the Settings screen may differ based on your subscription.

User Settings

User Settings

Customise your user settings

You can customise your basic user settings such as Enable Notification Sounds or the Network Monitor.

The Notification Sounds will alert you when a job is moved to the next workflow step. The Network Monitor will notify you of any issues with your internet connection.

Fit tiles to screen will allow all job tiles to be displayed on your device in the Jobs Today screen when the tile view is selected.

To do this, click the icon and use the switch to enable the option.

Basic Settings

Dealer Settings

Customise your dealer settings

You can customise your general dealer settings. Select what information can be shown to the customer on the quote and on the online customer authorisation form. Add multiple brands for multi-franchise dealerships.

Add job types such as warranty, internal or retail. Then, on the Jobs Today screen, you can filter your jobs by selecting multiple brands or job types.

To do this, click **Edit** and configure the settings to suit your dealership needs. To add Stock on Hand (SOH) descriptions, click the **+** icon and enter the text for each description. Click **Save**.

Employee Groups

Create employee groups and allocate users

You can create and edit employee groups and allocate users. Employee groups are used for setting up security permissions and workflow notifications. Edit the members of existing groups or add new groups.

To do this, click **Edit** and then click **Add**. Enter a name for the group, click in the **Members** field and select users from the drop-down.

If you have integration, click **Add Third Party ID** and select from the drop-down. Enter the user ID for the third-party system in each field. Click **Save**.

Security

Allocate security permissions

You can allocate security permissions for each employee group or view the permissions for a specific user. The security permissions include access and editing rights to certain information in the application.

You can activate the security settings for each employee group based on their role.

To do this, click **Edit** and select the corresponding checkboxes for each employee group. Click **Save**.

Integration Settings

Configure your integration settings

You can set up the integration type, and view or configure the integration settings.

Additional integration types may be available based on your subscription.

To do this, click **Add DMS** or **Add Third Party**, select the integration type and enter the details. Click **Save**.

- Additional integration types may be available based on your subscription.
- For more information on DMSi installation and DMS integration, check out the Media Hub.

  https://media.infomedia.com.au/?product=triage
- If you need assistance, please contact Customer Service.

  https://www.infomedia.com.au/contact/customer-support

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Job Management Settings

Workflow

Configure the dealership workflow

You can configure the workflow in the application to match your service process. Set up automated notifications that are sent to employee groups at each workflow step. Edit the existing workflow steps or add new ones.

To do this, click **Edit** and make any changes or click **Add** and enter a name for the step. Complete the information for each step, such as the colour, workflow action and notification groups. Click **Save**.

Inspection Designer

Configure vehicle inspection sheets

You can customise check sheets for your vehicle inspection process. Add an inspection check sheet for standard or electrical vehicles. The check sheets can be set up with major groups and their specific inspections and operations.

Add operations to a group manually or use the **Look up Operation** button to add operations automatically. You can view existing check sheets or add new ones.

Tyres

Configure tyre inspection options

You can configure the tyre options displayed in the inspection check sheet.

The existing tyre types can be edited and new types added. Set the tread depth warnings that will automatically indicate if additional work is required for the tyres. You can also configure the labour rate for the replacement of tyres.

To do this, click **Edit** and configure the general, tyre wear and tyre replacement options. Or, click **Add**, enter the tyre type and tread depth warnings. You can also easily add new tyre brands and sizes. Click **Save**.

Bodywork

Customise the bodywork section

You can customise the list of issues that can be selected in the bodywork section.

The existing issues can be edited and new issue types added. You can also add bodywork diagrams for different vehicle types.

To do this, click **Edit** and make any changes. Or click **Add** and enter a description of the issue, such as chipped or cracked. To add a bodywork diagram, click **Add** and enter a body type name, select **Enabled** and the **Body Type** from the drop-downs. Click **Save**.

Driveway Form

Configure the driveway form

You can configure the driveway form for the preliminary inspection. The driveway form is filled out by the Service Advisor with the customer.

To do this, click **Edit** and enable the driveway form using the **Yes** switch. Then, select the applicable workflow step and enable the tyre, bodywork or customer agreement sections. View and edit the customer agreement. Click **Save**.

Flags

Add or edit customer flags

You can add or edit flags that are applied to jobs to indicate specific customer information. The flags could indicate a VIP, or that a customer is waiting in the service lounge. The existing flags can be edited and new flag types added.

To do this, click **Edit** and make any changes, or click **Add** and enter the flag name.

You can also click on the flag icon to change the flag. Click **Save**.

Work Declined

Add or edit the reasons for declined work

You can add or edit the reasons that work is declined by the customer. You'll see the reasons displayed in the application when work is declined and when scheduling follow-ups. The existing declined work reasons can be edited and new ones added, such as the parts are not available.

To do this, click **Edit** and make any changes, or click **Add** and enter the reason. You can then use the **Visible to Customer** checkboxes to display the relevant reasons on the online authorisation form for the customer. Click **Save**.

Deletion Reasons

Add or edit the reasons for deleted jobs

You can add or edit the reasons for deleted jobs. You'll see the reasons in the application when deleting jobs using the Job Actions menu. The existing reasons can be edited and new ones added, such as the customer cancelled the appointment.

To do this, click **Edit** and make any changes, or click **Add** and enter the reason. Click **Save**.

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Special Features Settings

Print Settings

Create customised print profiles

You can create or edit customised print profiles.

To do this, click **Add**, enter a new profile name and click **Save**. Then, click the icon, enter the dealership details, header and footer information and select a print template. Click **Save**. Or, click **Edit** to change a profile name.

Price File Import

Import price files

You can import parts price files into the system that were exported directly from your DMS. The file extracted from your DMS must be in a .CSV format.

You need to set the file import settings and map the columns of your file to match the application fields. You can import files manually or use the SFTP and set up an automated process.

It's not recommended to import the price file more than 5 times a day.

RO Import

Import repair orders

You can import repair orders directly from your DMS which will upload the jobs into the application. The file extracted from your DMS must be in a .CSV format.

You need to set the file import settings and map the columns of your file to match the application fields. You can import files manually or use the SFTP and set up an automated process.

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Customer Reports

Configure customer reports

You can configure general, customer authorisation and inspection report options.

This includes enabling the online authorisation feature and setting up the email, SMS and social media messages that will be sent to the customer with the inspection report.

To do this, click **Edit**, enable the customer authorisation switch and select the workflow steps for customer authorisation. Confirm the default template is selected for the email, SMS and social media messages, then click **Save**.

Alternatively, create a customised message for the customer in the Message Templates settings, then return to Customer Reports to update the default option for your preferred template.

* Additional setup may be required for the social media option.

Job Boards

Configure job boards for your dealership

You can configure job boards to display customer and job information. The job boards display welcome messages and updates to customers as vehicles progress through the dealership. You'll see information, such as the workflow status, customer information, weather and media settings.

To do this, click **Add**, enter a name for the job board and click **Save**. Then, click the icon and enter the job board details. Click **Save** or click **Edit** to change a job board name.

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Message Templates

Create email, SMS and social media templates

You can create email, SMS and social media templates to send inspection reports, request customer authorisation or to follow up with your customers on any recommended work that was declined. Select an existing template or create a customised message.

You can create templates to request authorisation for additional work via social media apps, such as WhatsApp. Additional setup may be required.

To add a new template, click **Edit** and **Add Template**. Select an option from the drop-down, enter a template name and click **Save**. To edit a template click **Edit** and **Edit Template**. Customise your message or click **Select Template** and select an option from the drop-down. Click **Save**.

Rules and Actions Designer

Create rules for the display of workflow notifications

You can create rules for the display of workflow notifications and other job requirements. For example, set up automated notifications to be sent to an employee group when a job progresses to a certain workflow step.

To do this, click **Add** and select a rule and enter the parameter. Then under Action, select **Notify** and the user group from the drop-downs. Or, select **User** and then the specific users from the **Enter parameter** field. Click **Save**.

Automatic Workflow Messages

Configure settings for the automatic workflow messages

You can configure the settings and the messages that will be sent to the customer. Automated notifications can be sent by SMS or email to request approval for additional work, or if the job has been delayed.

To do this, click **Edit** and enter a customer-friendly status for each workflow step. Select the required notification checkboxes and enter the text for the SMS and email messages that will be sent to the customer. Click **Save**.

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Tax Rates

Configure your tax rates

You can create new tax rates or modify existing tax rates. Tax can then be applied to labour, sundries and parts. There is the ability to set up individual tax rates or tax groups. You can then select a default tax rate for parts.

To add a tax rate, click **Add**, enter the tax rate details and click **Save**. To add a tax group, set up the individual tax rates first, click **Edit** and select the **Yes** switch. Click **Add Tax Group**, enter the name and select the tax rates from the drop-down. Click **Save**.

Labour Rates

Configure your labour rates

You can create new labour rates or modify existing labour rates. Set up a flat rate for the labour price or set up multiple rates based on the exact amount of labour time.

To add a flat rate, click **Add**, enter a name, enter the hourly rate and fill out any other details. To add multiple rates, click **Add**, enter a name, the number of hours, the hourly rate for each level and fill in any other details.

In some regions, you can select the **Use Pricing Matrix** checkbox, click **Set Pricing** and configure a labour matrix based on difficulty levels and vehicle categories. Click **Save**.

Follow-ups

Configure your follow-ups

You can enable and send automatic follow-up emails or SMS messages to the customer. The automated follow-up messages are sent based on the number of days after a red or amber operation has been declined.

To enable the automatic follow-up date, click **Edit**, select **Yes** for the red and amber operations, and enter the number of days. To enable the automatic message, select **Yes** for the email and SMS messages and select a template from the drop-downs. Click **Save**.

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