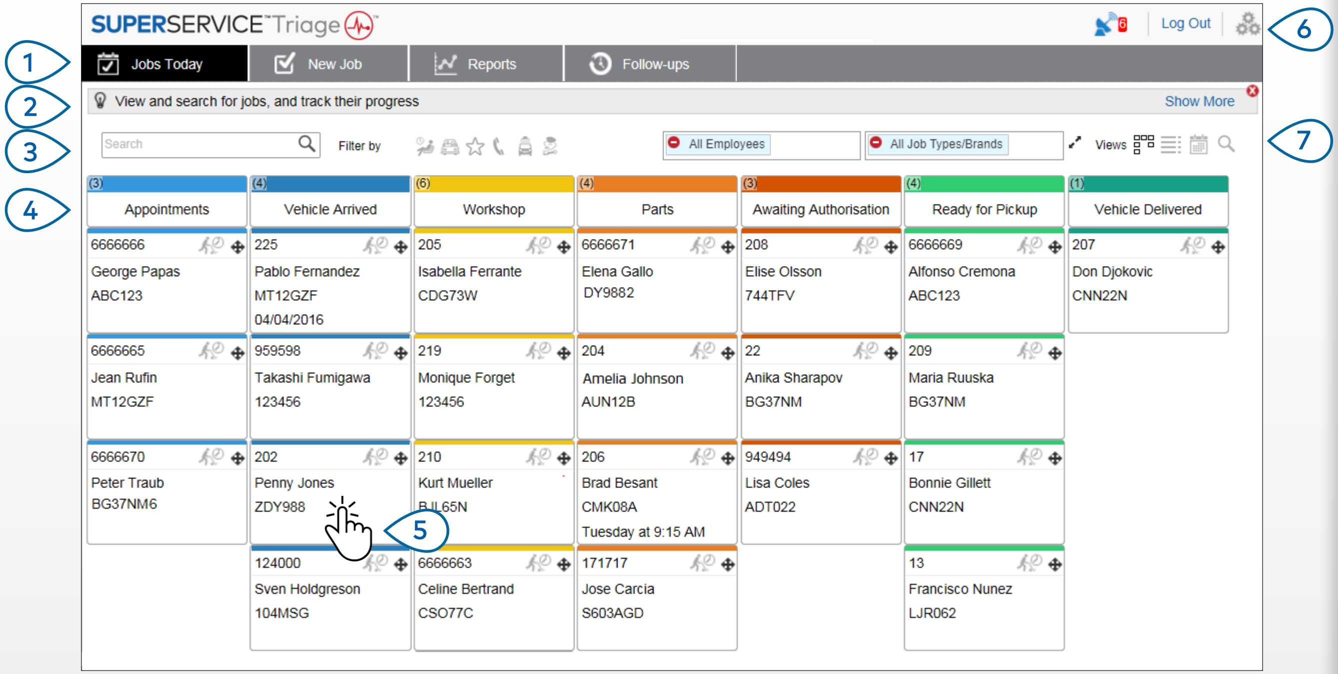
GETTING STARTED GUIDE

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

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.

MK1610_EN

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 that have been created manually or imported from your DMS.
5. Tap a job to open it and view customer, inspection and quote details.
6. Access the Settings screens.
7. Display the Jobs Today screen in Tile, List or Calendar view.

SUPERSERVICE™ Triage

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)
   - No work is required
   - Work is required soon
   - 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
   - Enter the tread depths
   - Yes Report a damaged tyre
   - Add a note
7. Complete the **Bodywork** section.
   - Tap to record an issue
   - Select an issue
   - Add a photo
   - 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 and type the details.
- If the tyres are wearing evenly, enter the middle tread depth first.
- Tap to copy the tyre brand and size to all tyres.

SUPERSERVICE™ Triage

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.
   - 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. Use the icons to complete the detailed inspection.
   - Add an operation
   - Add a photo or video
   - Change to text input
   - Delete an operation
   - Add a note
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 1 3 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.

SUPERSERVICE™ Triage

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. Confirm any information entered in the **Notes** box.
6. Select the part availability from the **SOH** drop-down and confirm the parts pricing.
7. Add prices manually for any unpriced parts (if required).
8. Select the green tick to confirm the change.
9. If you need to add more items, select from the **Add Item** drop-down and fill in the details.
10. 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.
- If you have DMS integration, tap **Price Operations** to get pricing from your DMS.

SUPERSERVICE™ Triage

REVIEW THE INSPECTION REPORT

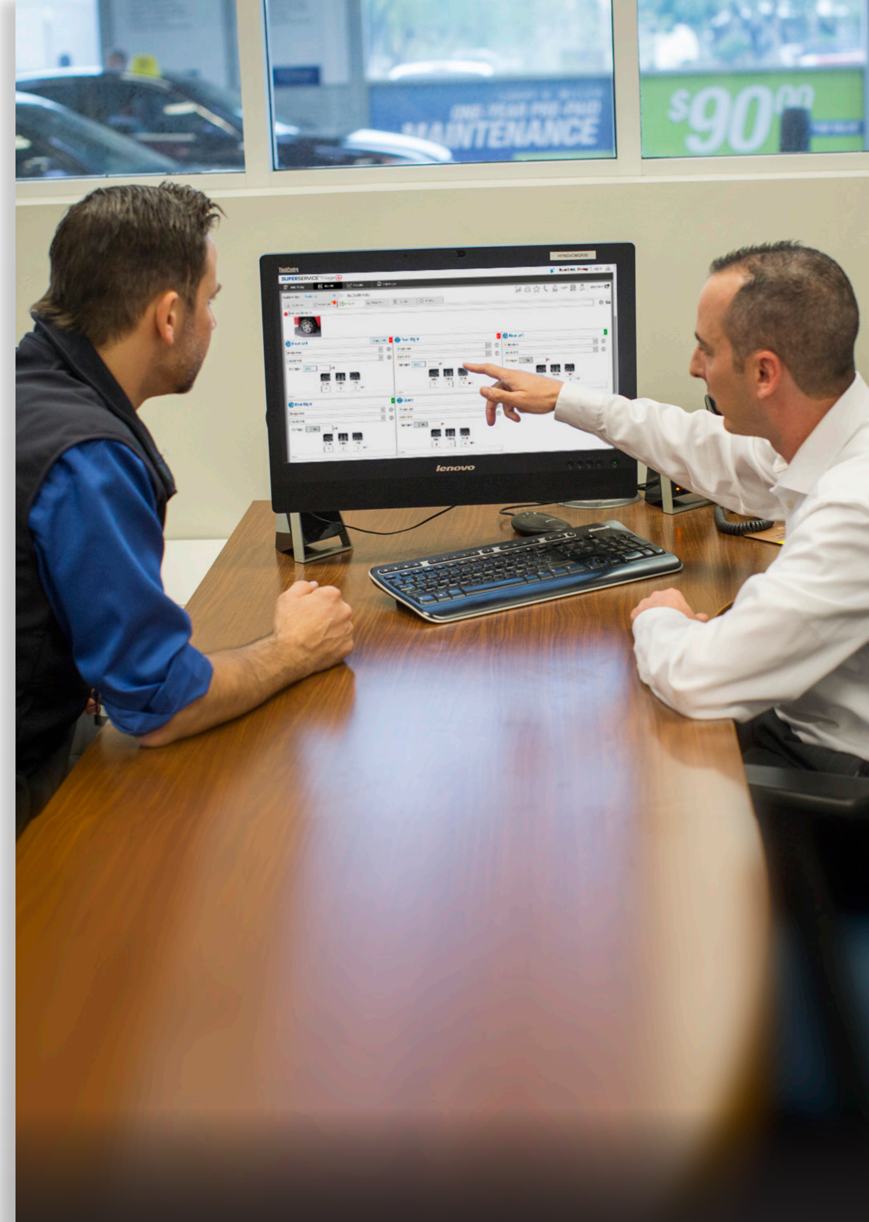
When the parts pricing and availability has been confirmed the job can be reviewed prior to gaining authorisation from the customer.

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 Inspection tabs indicate that notes have been added.
- Tap the image thumbnail to view a larger version of the photo or video.



SUPERSERVICE™ Triage

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 Review tyre replacement details and pricing (if applicable).

6 Contact the customer and request authorisation for each work item.

7 Select from the **Authorisation Status** drop-down to record the customer responses.

8 If any work is not authorised select a reason for the declined work from the drop-down, then select a follow-up date.

9 Record the details in the **Customer Authorisation** box.

10 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.

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.

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.

SUPERSERVICE™ Triage

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 **SMS Reminder** button 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.

SUPERSERVICE™ Triage