Autoserve1 Getting Started Guide

Basic / One-Way Integration

Creating Trust at the Point of Decision™

Index

Click below to jump to each of the sections within our training document

Admin

Guides you through the Administrator's portal for your AutoServe1 store.

This includes setting up your store, and the various settings you can enable inside your Autoserve1 store.

Click here to access the Admin Portal Training Video

Technician

Guides you through the use of the AutoServe1 software from the Technician's perspective.

This includes completing an inspection.

Click here to access the Technician Training Video

Service Advisor

Guides you through the use of the AutoServe1 software from the Technician's perspective.

This includes completing, opening, and assigning tickets, as well as preparing & sending reports to the customer.

Click here to access the Service Advisor Training Video

Admin Portal

Index

Click here to view the Admin Portal training video.

AutoServe1

Creating Trust at the Point of Decision™

Creating Trust at the Point of Decision™

Getting Started - First Steps

1. Download Google Chrome
2. Go to the AutoServe1 website in your **Google Chrome browser**, and add a **bookmark**
    a. To add a bookmark click the **Star** at the end of the address bar

3. Do you require integration?
    a. Contact our team at techsupport@autoserve1.com for assistance with Integration.
4. Purchase your **tablets**
    a. Check out our guide to see what tablets work best with AutoServe1.
    b. Set up your tablet with our easy to follow tablet setup guides.

Admin - Integration Setup

No Integration

- No scheduled integration is required.
- Tickets created directly in AutoServe1 from the Service Advisor Dashboard

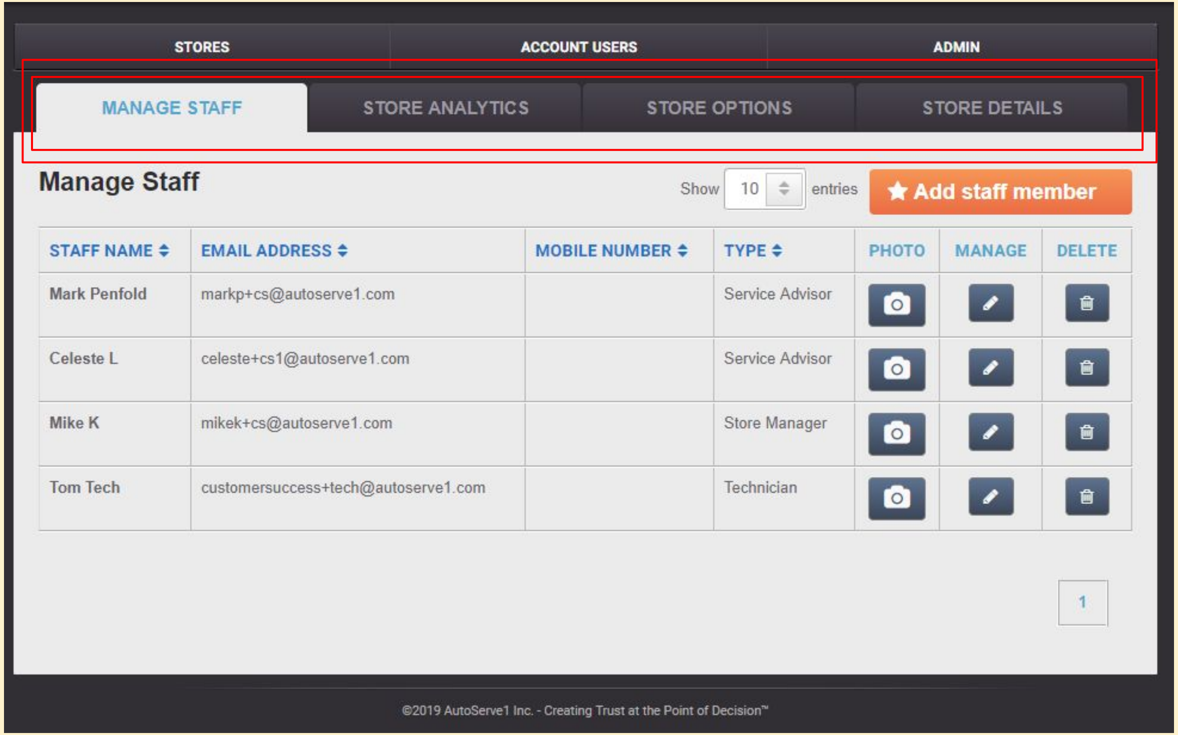
One Way Integration

- Scheduled integration required
- Work orders created in SMS and get populated into AS1
- One way integration shop management systems include:
    - Napa Tracs
    - Lankar SQL
    - Lankar
    - RO writer
    - AB Magic
    - ROWriter Beta
    - Costar
    - GemCar
    - Quorum (Proquotes)

Two Way Integration

- Scheduled integration required
- Work orders created in SMS and get populated into AS1
- The inspection results are then pushed back into the shop management system
- Two way integration shop management systems include:
    - Protractor
    - VAST Enterprise
    - Mitchell1 Manager Enterprise Pro
    - NAPA Tracs Enterprise

Admin - Your Administrator Portal



When you first log into your AutoServe1 Admin account this is the page you will see.
From here you are able to navigate through the admin portal, where you have the ability to:

- **Manage Staff**
- **View Store Analytics**
- **Enable/Disable Store Options**
- **Review/Change Store Details**

If you have more than one store listed under your AutoServe1 you will be also be able to:

- **Navigate Between Stores**
- **Edit Account Users**
- **Manage Account Information**

Admin Portal Video Guide

Familiarising Yourself With The AutoServe1 Navigation Tools In the Admin Portal

STORES | ACCOUNT USERS | ADMIN

★ Create new store

Click this button to add a new store to your account. Fill in the *Store Details*, and click *Create*

★ Create new user

Click this button to add a new admin user to your account. Fill in the *user details, assign the role*, and click *save*

★ Edit account inspections

Click this button to set your default inspection, as well as edit, copy, delete, and create new custom inspections.

MANAGE STAFF | STORE ANALYTICS | STORE OPTIONS | STORE DETAILS

Camera Icon - Allows you to click and add photos of yourself and your staff

Garbage Can Icon - Allows you to delete a staff member's profile

Pencil Icon - Allows you to manage and edit your staff profiles

★ Add staff member

Please see the following slide for instructions on how to add a staff member

Store Dashboard

- OVERVIEW
- TICKETS
- REPORTS SENT
- CUSTOMER STAR RATING
- INSPECTIONS
- INVOICE ANALYSIS
- PICTURES / INSPECTION
- EXPORT
- EXPORT TECHNICIAN SUMMARY
- EXPORT SERVICE ADVISOR SUMMARY

This is your navigation drop down in the store analytics tab. Reveal the options by clicking on the "hamburger" dropdown (☰)

★ Inspections Manager

This inspection manager button allows you to navigate into your digital inspection page. Within that page you are able to set your default inspection, as well as edit, copy, delete, and create new custom inspections. Please click HERE to be redirected to a video that details the capabilities of the inspection builder.

★ Security Tokens

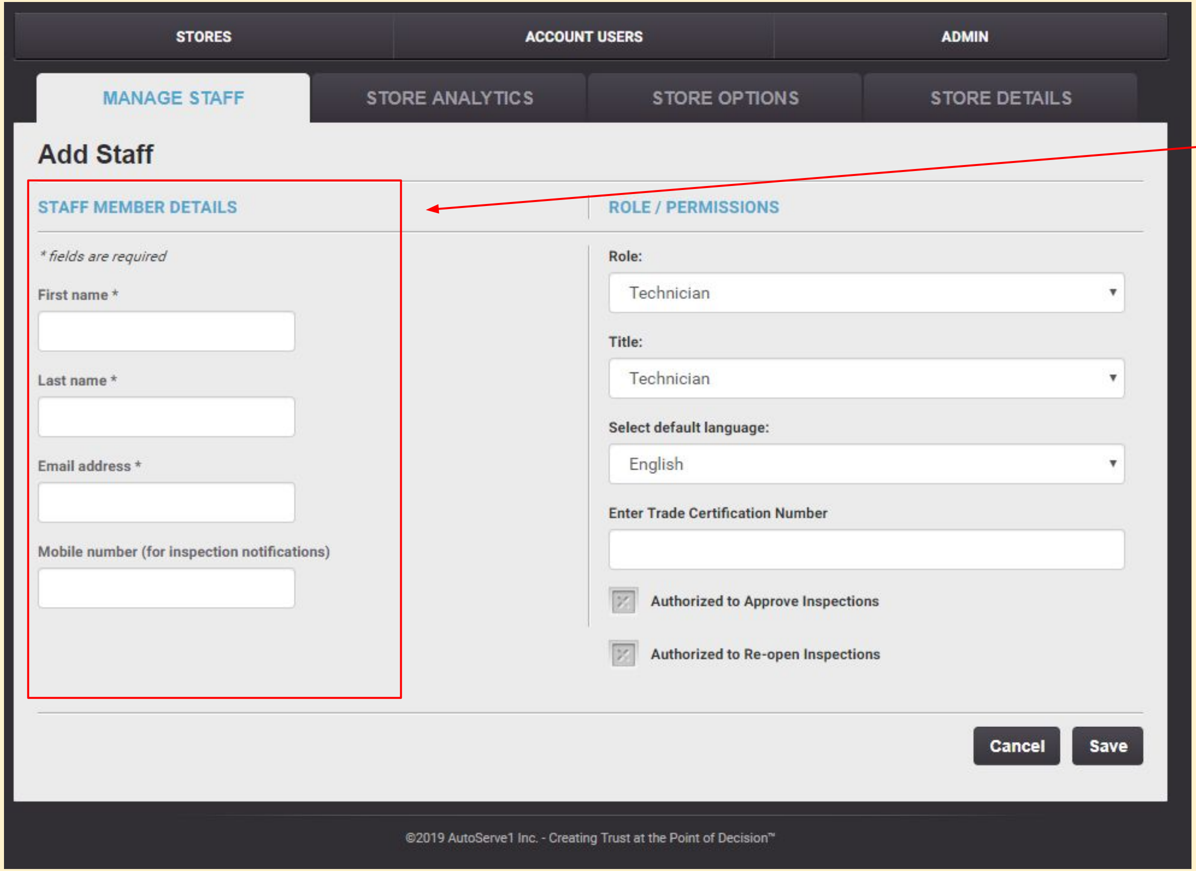
This tab is where you can view and edit store details such as address, phone number, email, website, etc. You also have the ability to change your admin password by clicking :

Click here to change password

To access your store and view your dashboard click:

Go to Store as Root

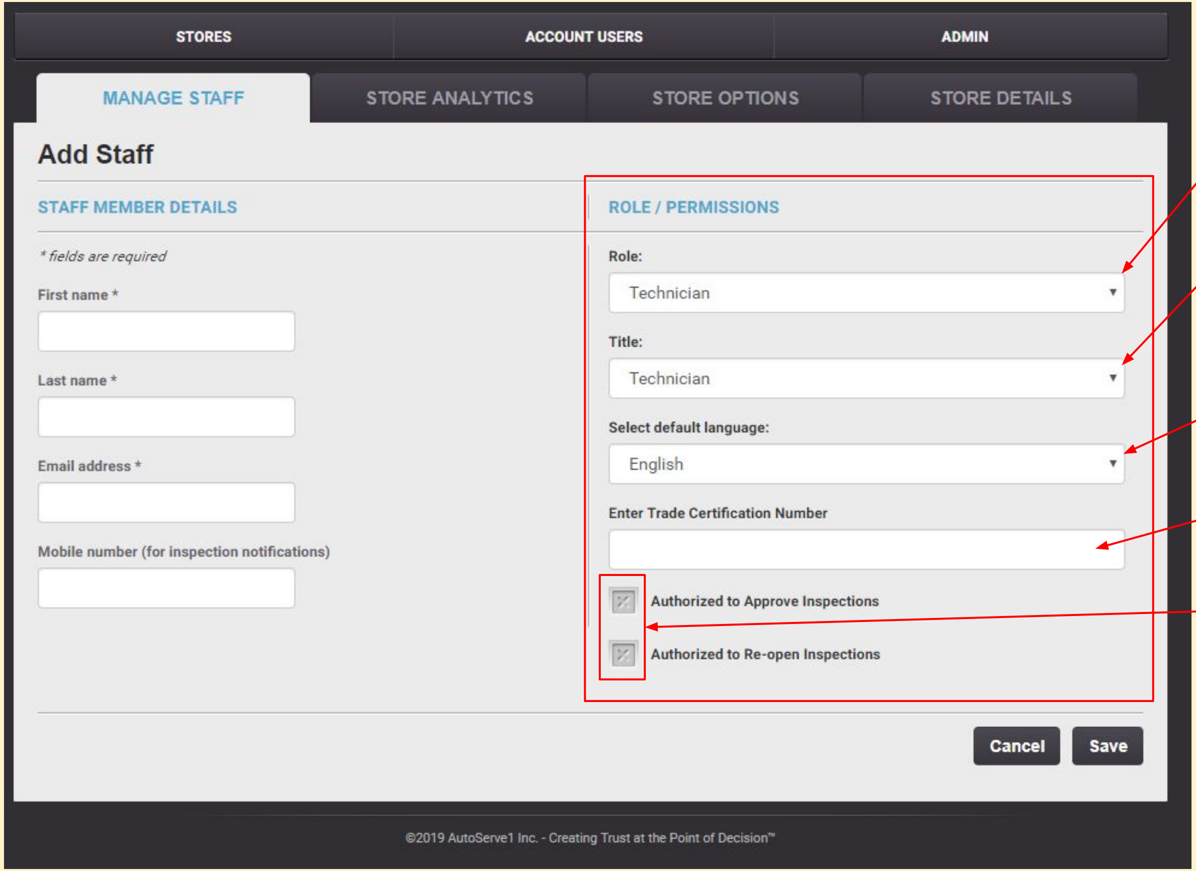
Admin - Manage Staff



This is your **manage staff page**, where you add your staff members, and assign them their **role (permission)**, and **shop title**.

- **Staff Member Details**
  - Staff first name
    - Enter your staff member's first name
  - Staff last name
    - Enter your staff member's last name, **or** last initial
  - Staff Email
    - Enter your staff member's email, it must be unique as it is used as the staff member's **username.**
  - Mobile Number (optional)
    - Add your staff member's mobile number if you would like them to be sent notifications when an inspection is complete

Admin - Manage Staff



Role / Permissions

- To select your staff member **Role** click the arrow to reveal the drop down menu
- To select your staff member **Title** click the arrow to reveal the drop down menu. If you don't see an appropriate title, click Other to customize your staff member's title
- Select your **Default Language** click the arrow to reveal the drop down menu
- Enter your technician's 310S certification number in the Enter Trade Certification Number field
- Check the boxes to enable your technician's abilities **(Authorized to Approve Inspections / Authorized to Re-open Inspections)**

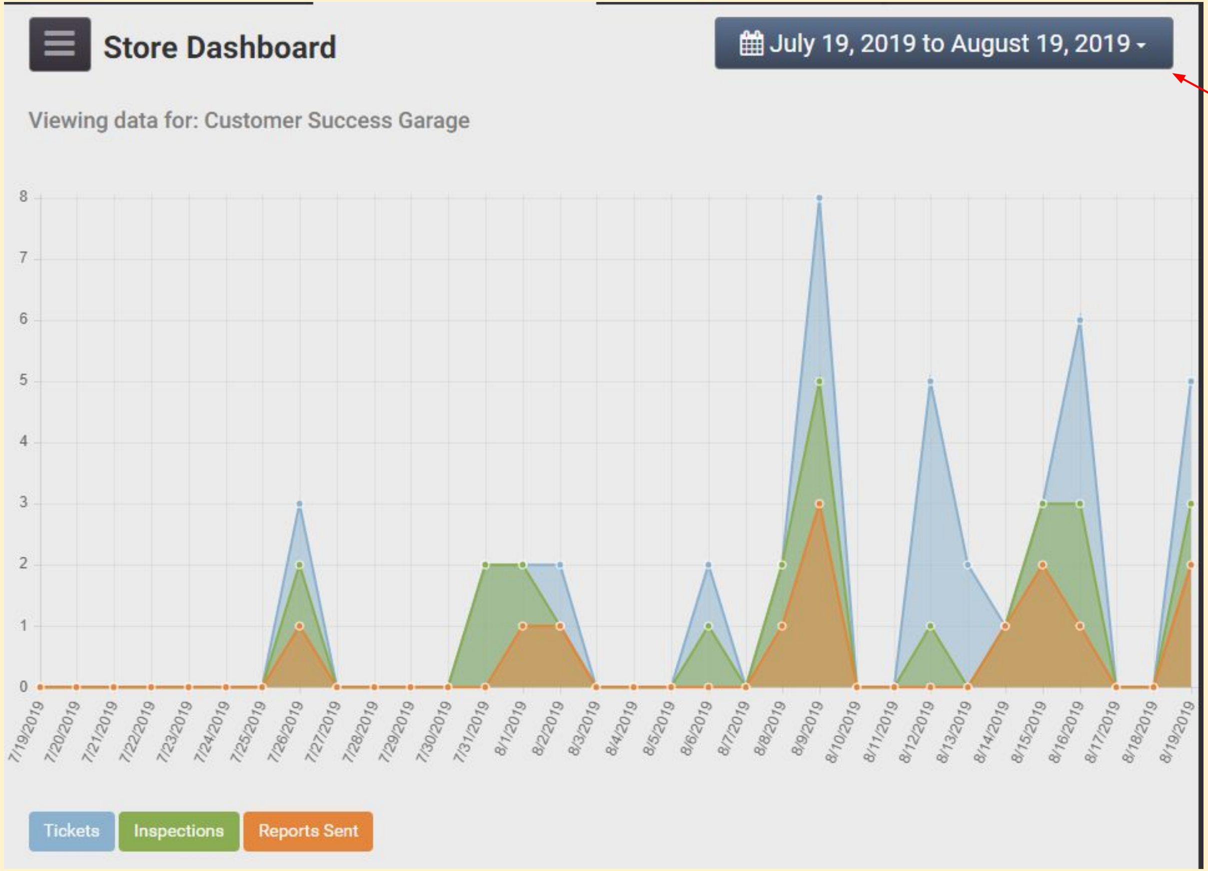
Admin - Manage Staff

Defining Roles and Permissions

Role	Permission	Details
Technician	**Level 1 Permission**	• Access to work order on AutoServe1 • Can preform and must FINISH inspections • Clock in to each individual job/inspection
Service Advisor	Level 2 Permission	• Create new tickets / Edit existing tickets • Assign staff to work orders / individual labour lines • Preform and/or edit inspections • Complete estimates • Prepare and send reports • Approve/decline work
Store Manager	**Level 3 Permission**	• Access to all technician and service advisor permissions • Ability to add/delete/edit staff • Ability to add/edit inspections • View store analytics tracking

ROLE: Defined as the permission given to the staff member, relating to their access to your AutoServe1 account.
TITLE: Defined as the staff member's position that will be shown to the customer on their report.

Admin - Analytics: Store Dashboard

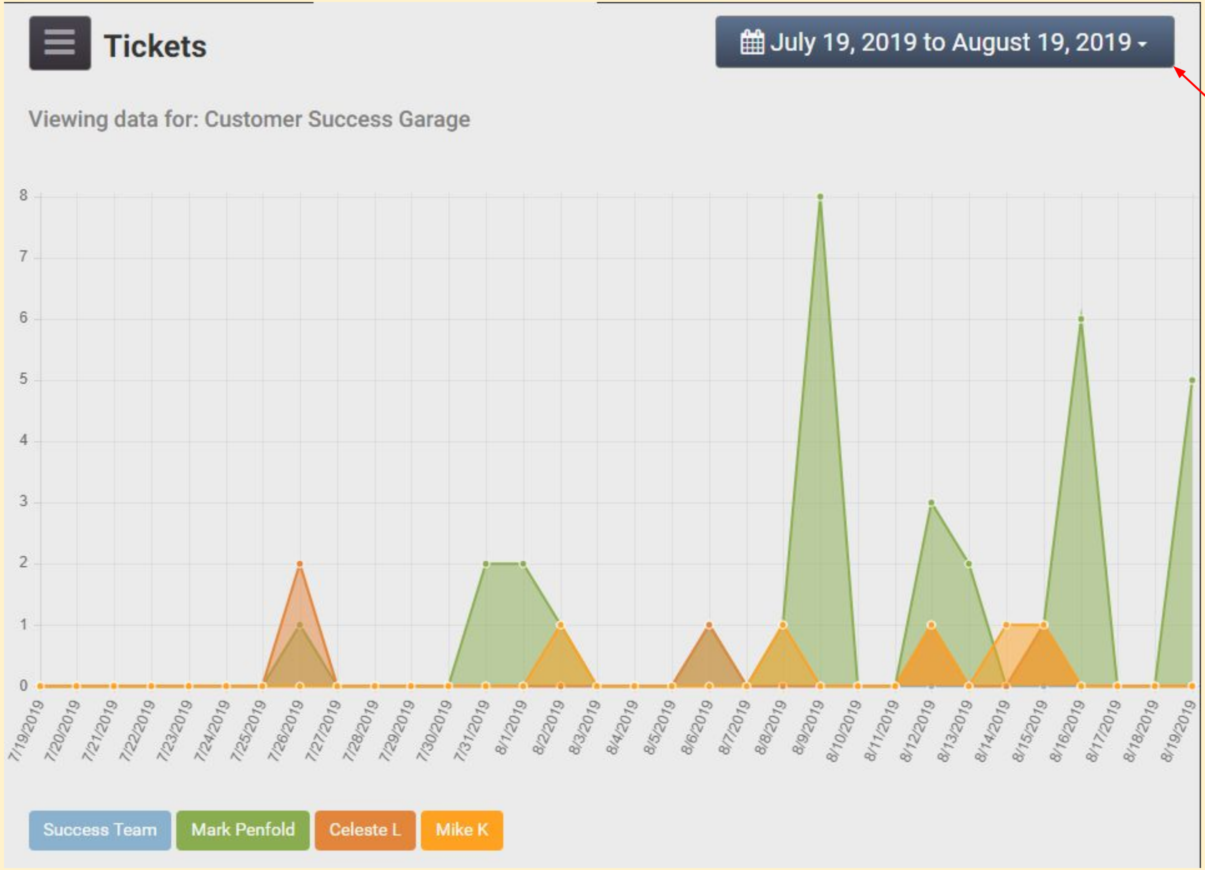


This is a simplistic overview of all works completed by a store using AutoServe1 during a **given date period,** which can be changed at any time by clicking the calendar icon in the top right hand corner.

This analytic allows you to see how many vehicles you have inspected, and how many inspection reports have been sent via the software.

- All inspections loaded into AutoServe1 will show up here. These are referred to as **Tickets** and are shown in the graph as **Blue.**
- All inspections <u>completed</u> through Autoserve1 by technicians will appear here. These are referred to as **Inspections** in the graph and show as **Green.**
  - **NB:** An inspection must be signed off by hitting 'Finish Inspection' before it will register as a completed inspection.
- Following a completed inspection, any full inspection reports that are sent from the Autoserve1 software, through to the customer shows up as **Orange.**

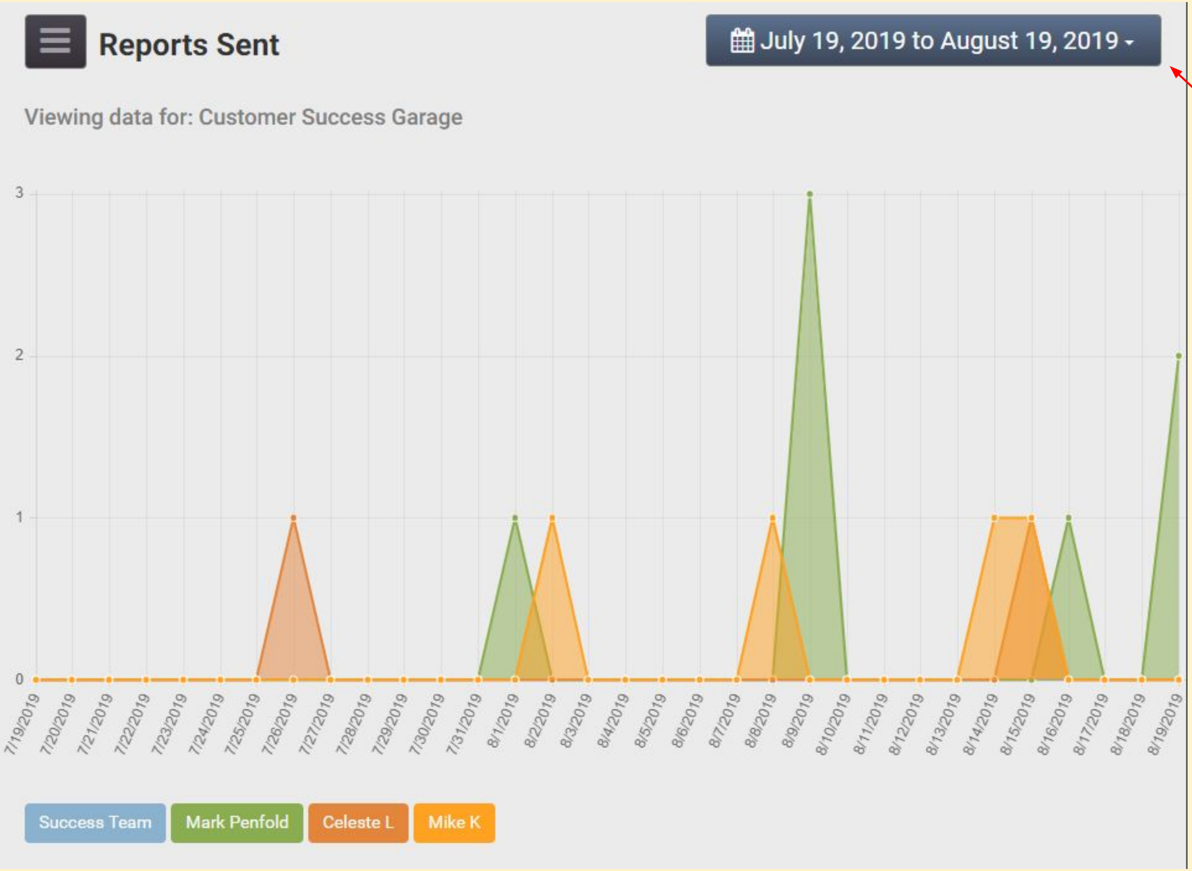
Admin - Analytics: Tickets



This analytic allows you to see how many tickets have been assigned to a specific Service Advisor within AutoServe1 during a **given date period,** which can be changed at any time by clicking the calendar icon in the top right hand corner.

- You can click on any of the service advisors' names listed below the graph to bring them to the forefront for easier viewing.

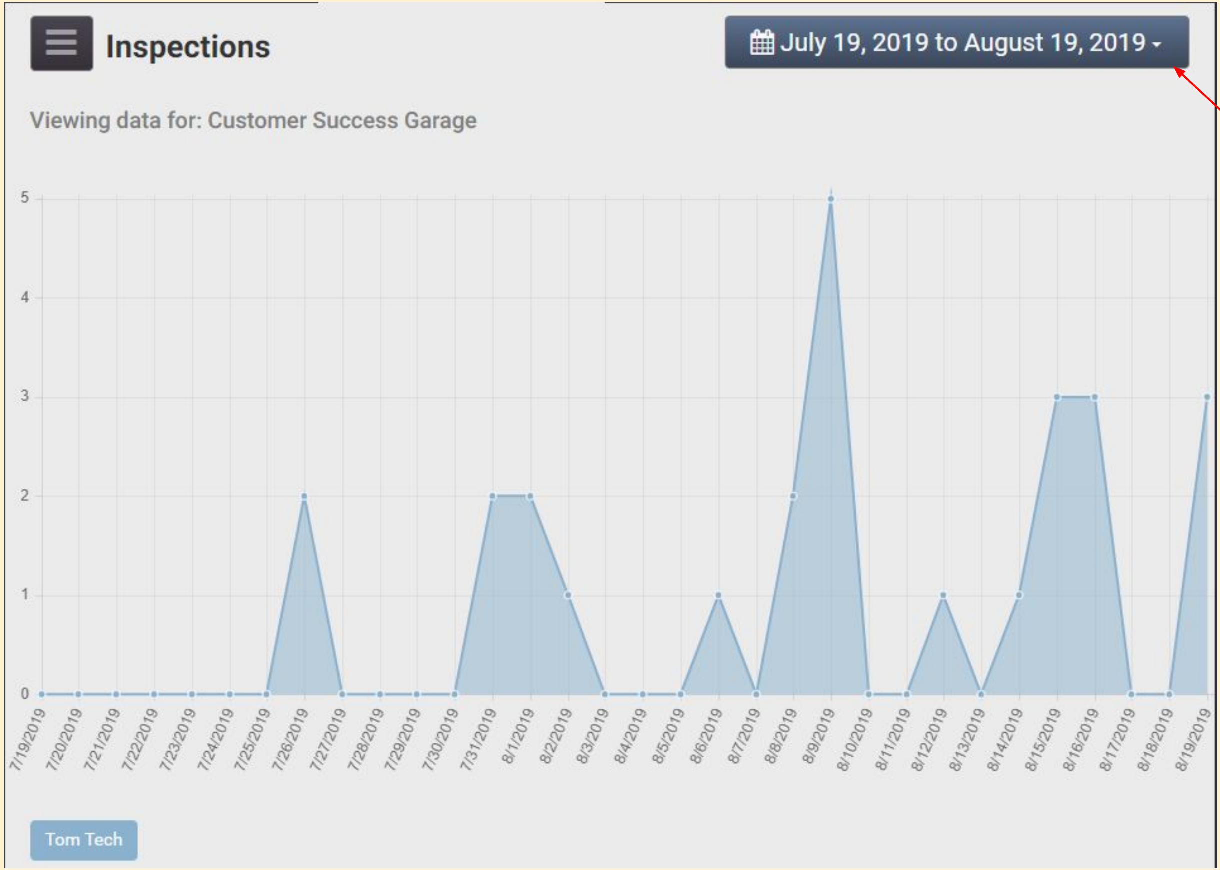
Admin - Analytics: Reports Sent



This analytic allows you to see how many reports have been sent by each specific Service Advisor within Autoserve1 during a **given date period,** which can be changed at any time by clicking the calendar icon in the top right hand corner.

- You can click on any of the service advisors' names listed below the graph to bring them to the forefront for easier viewing.
- An inspection must be **sent to the customer** via text, or email, inside of AutoServe1 before it will show up here. Any printed in-store, but not sent, will not register.

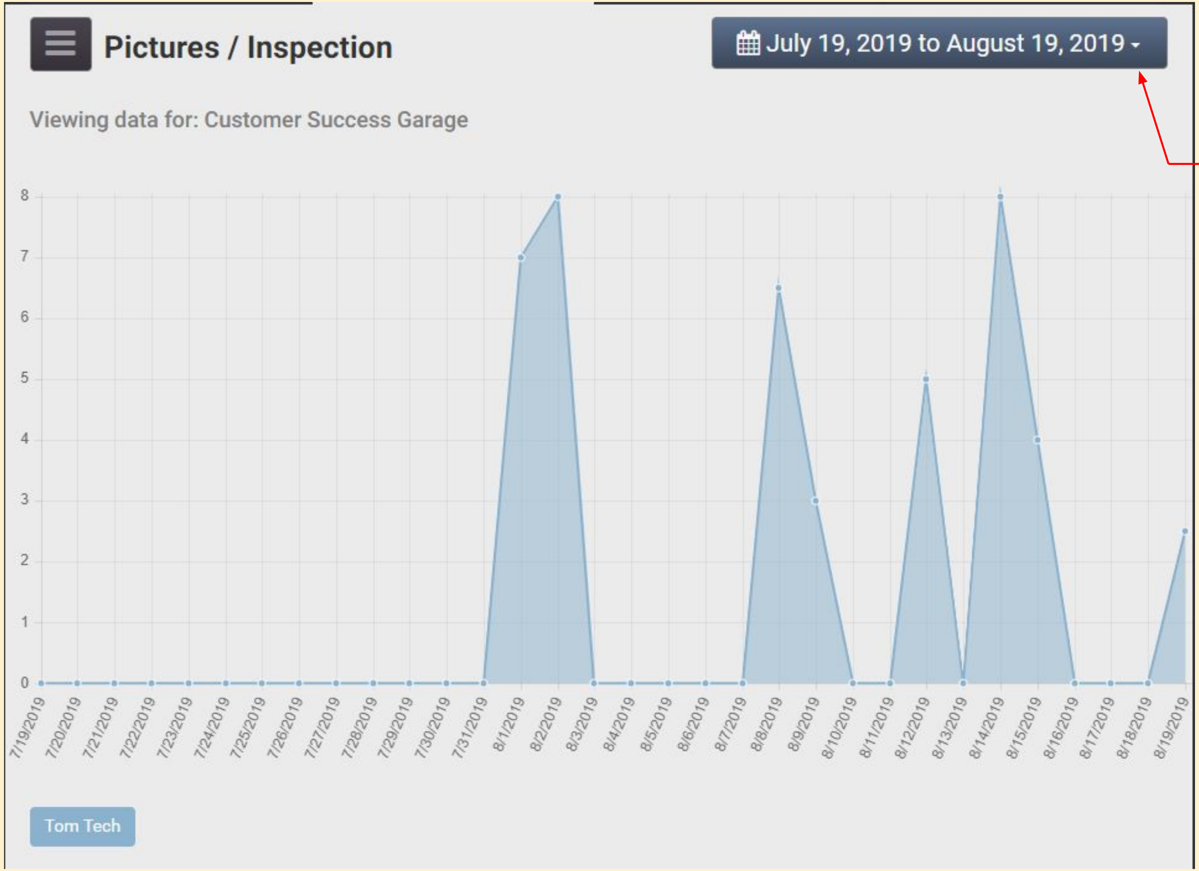
Admin - Analytics: Inspections



This analytic allows you to see how many inspections have been completed by a specific technician within AutoServe1 during a **given date period,** which can be changed at any time by clicking the calendar icon in the top right hand corner.

- You can click on any of the technicians' names listed below the graph to bring them to the forefront for easier viewing.
- An inspection must be signed off by hitting 'Finish Inspection' before it will register as a completed inspection.

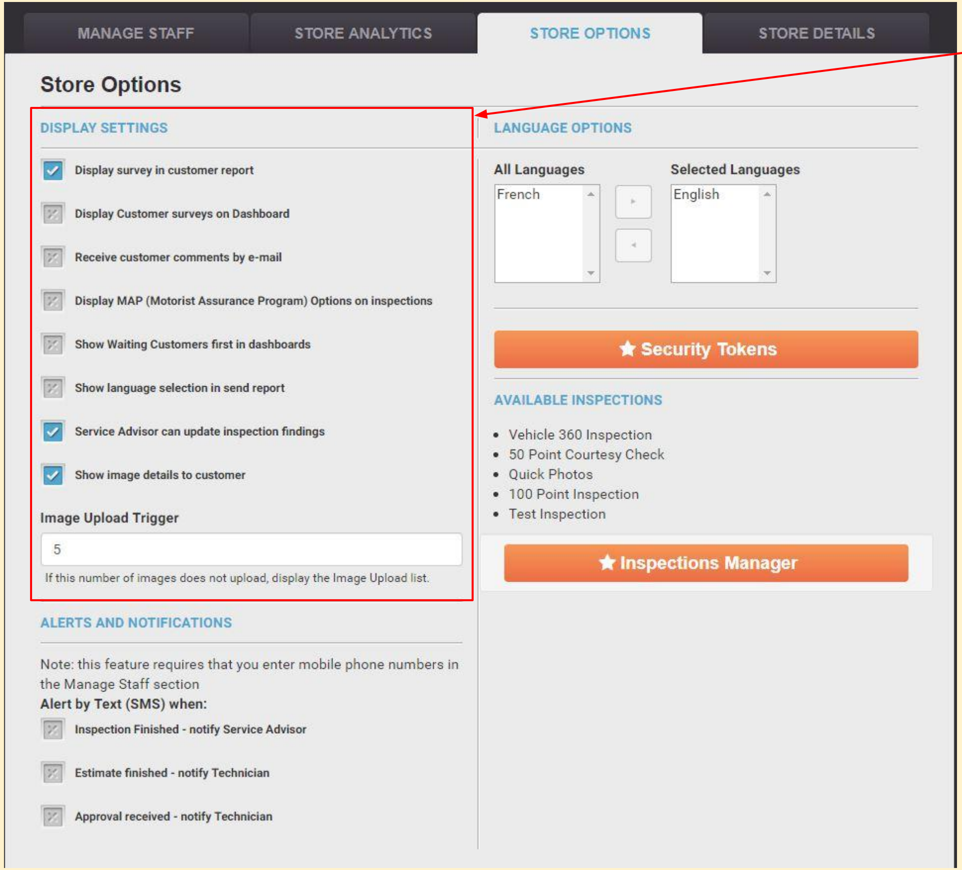
Admin - Analytics: Pictures per Inspection



This analytic allows you to see how many photos have been added to an inspection, on average, by a specific technician within AutoServe1 during a **given date period,** which can be changed at any time by clicking the calendar icon in the top right hand corner.

- You can click on any of the technicians' names listed below the graph to bring them to the forefront for easier viewing.
- An inspection must be signed off by hitting 'Finish Inspection' before it will register as a completed inspection.

Admin - Store Options: *Display Settings*



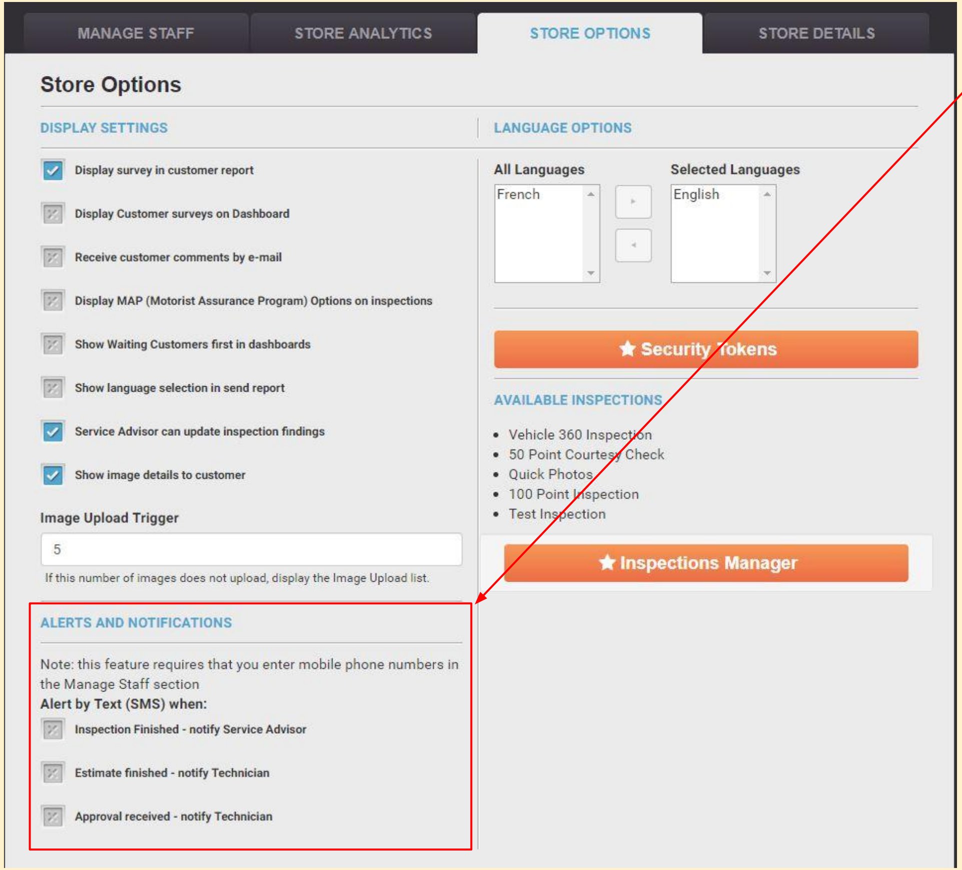
You can edit the display settings for your store via these options here.

The following options are able to be toggled on, or off, here:

- **Display survey in customer report:**
  - Gives the option for a survey of the experience to be filled out by the customer, and returned directly to your store.
- **Display customer surveys on dashboard:**
  - Displays responses to the customer survey in your dashboard.
- **Receive customer comments by email**
  - Displays responses to the customer survey in a return email to your store.
- **Display MAP options on inspections**
  - Opens up Motorist Assurance Program options on the inspections within AutoServe1.
- **Show Waiting Customers first in dashboards**
  - Will display all customers listed as 'waiting' at the top of the dashboard, rather than list Repair Orders in order of when they were entered into AutoServe1.
- **Show language selection in send report**
  - Gives the option for the customer to receive french or english reports.
- **Service Advisor can update inspection findings**
  - Gives the Service Advisor the ability to update item severities, photos and notes within the vehicle inspection.
- **Show image details to customer**
  - Allows the customer to see the image details i.e. time stamp, who they were taken by, etc. in their copy of the Inspection report.

Please note the **Image Upload Trigger** is for the use of our development team and doesn't need to be edited/altered at a store level.

Admin - Store Options: *Alerts & Notifications*



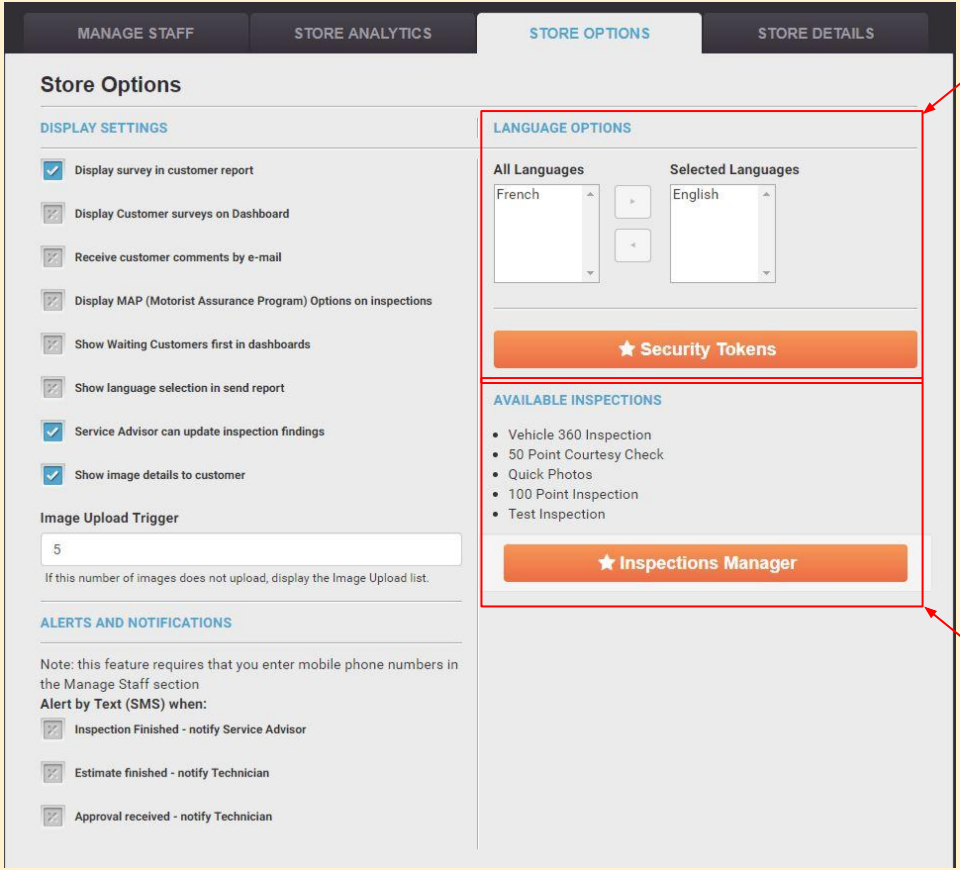
You can edit the display settings for your store via these options here.

The following options are able to be toggled on, or off, here:

- **Inspection Finished**
  - The Service Advisor receives a text when a technician finishes an inspection assigned to them
- **Estimate Finished**
  - The technician receives a text message when a service advisor has complete estimates on an inspection assigned to them
- **Approval Received**
  - The technician receives a text message when a service advisor has completed the approved/declined work on an inspection assigned to them

Please note that for these alerts to work, you will need to have a mobile number included under each of the staff members' details on the manage staff page.

Admin - Store Options: *Language Options & Inspections*



<u>Language Options</u>

The following options are able to be toggled on, or off, here:

- **French**
- **English**

<u>Security Tokens</u>

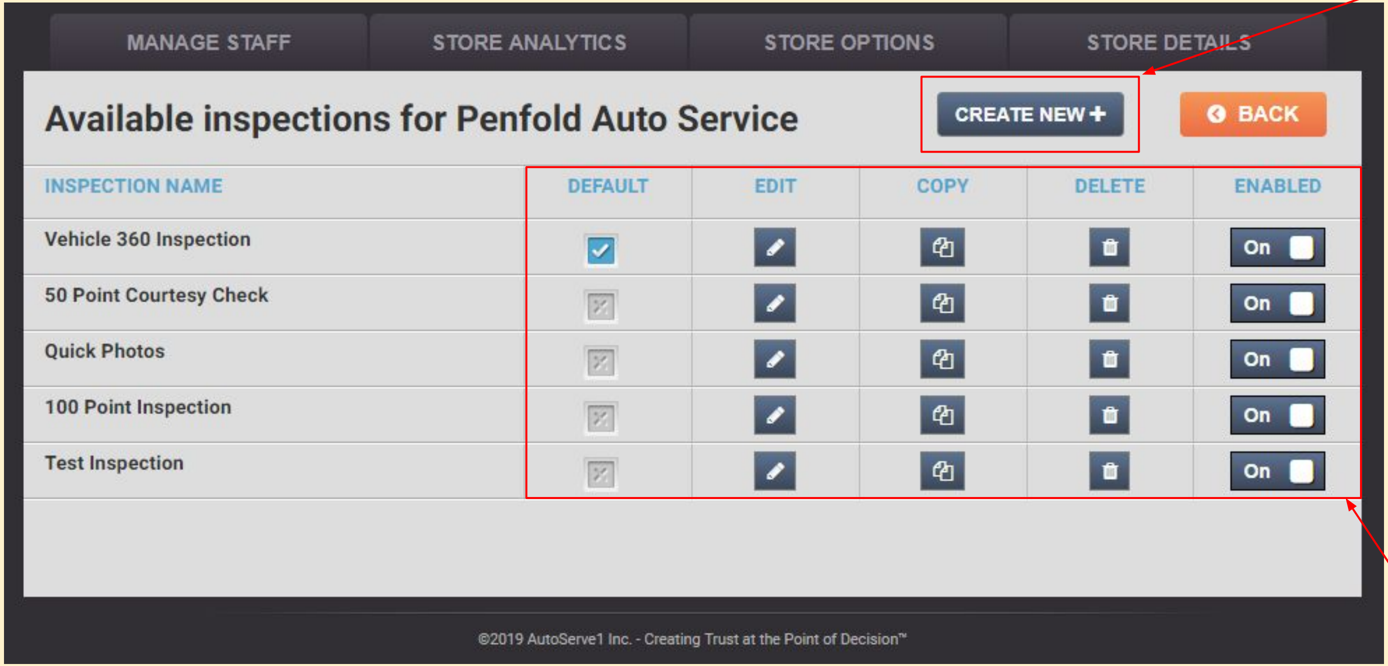
These are used to identify your AutoServe1 account when integrating it with other software. You will not need to access this.

<u>Available Inspections</u>

The following options are able to be toggled on, or off, here:

- **Available Inspections List**
  - A list of all inspections that are currently available for use at your store.
- **Inspections Manager**
  - Clicking this will give you access to create, copy, edit, or delete inspections within your store, toggle your inspections on and off, as well as set your default inspection.

Admin - *Inspections Manager*



You can create new inspections for use at your store at any time.

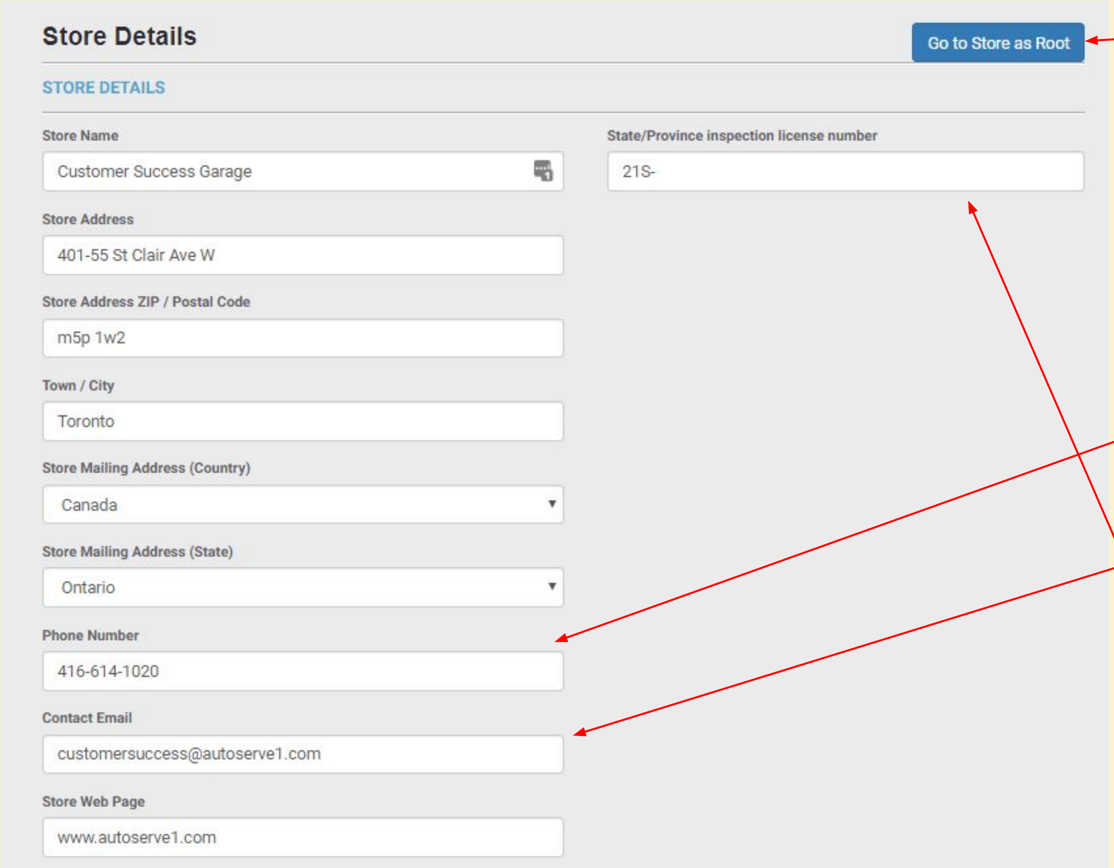
If you would like further information on building inspections, please watch our [Inspections Builder Video].

Alternatively, you can book yourself into our weekly training sessions [HERE] (day), or [HERE] (evening).

These options allow you make the following changes to your inspections:

- **Edit** - Edit the inspection. Any changes made here will apply to this inspection going forward.
- **Copy -** Creates an exact duplicate of the selected inspection.
- **Delete -** Permanently removes the inspection from your store.
- **Enabled** - toggle on/off whether or not this inspection is able to be used at your store.

Admin - *Store Details*



You can access your store's dashboard at any time by clicking the '**Go to Store as Root'** button within your Store Details page.

The Store Details on this page are the details of the store that will be shared with the customer. This can be edited at any time to reflect any changes / movements within your store, however it is important to keep this information up to date for the benefit of your customer.

Some important information to know for this page is:

- The **Phone Number** listed here will show up in the reports sent to the customer, and all text message notifications sent to the customer will invite them to call this phone number.
- The **Contact Email** listed here is the email that will be sent to customers, and any replies from customers will return to this email address. Please ensure this email address is one that your service advisors have easy access to.
- The **State/Province Inspection License Number** is only valid for states/provinces that need a specified license to complete state mandated inspections. This can be left blank if it is not relevant to your store.

Technician

Basic Autoserve1 Daily Flowchart

START

Car arrives in store & a ticket is created in AutoServe1.

Service Advisor assigns that inspection to a technician

Technician selects the assigned vehicle from their dashboard

Technician takes vehicle profile photo & fills in additional information

Technician completes walk around check of vehicle - taking notes of dents/chips, etc.

Technician completes assigned inspection - adding photos/videos as evidence where needed

Technician looks over the summarized inspection adding/editing notes & photos

Technician **Finishes Inspection** & sends it to the Service Advisor

Technician is taken back to the dashboard in AutoServe1, and moves on to their next vehicle

Service Advisor looks over the completed inspection, requesting further information from the Technician as needed

The completed inspection is sent to the customer via phone/email

Service Advisor speaks to the customer via phone or with the messaging app

If **approved**, the inspection is sent back to the Technician to complete the work.

If **not approved** - or no additional work is needed - the customer will collect their vehicle, and the ticket can be archived.

Service Advisor

Service Advisor

Technician

Carside Autoserve1 Daily Flowchart

START

Car arrives in store & a ticket is created in Vast.

A work order is created in VAST Enterprise and is assigned to a salesperson (advisor) and an inspector (tech)

Service Advisor

Technician selects the assigned vehicle from their dashboard

Technician takes vehicle profile photo & fills in additional information

Technician completes walk around check of vehicle - taking notes of dents/chips, etc.

Technician completes assigned inspection - adding photos/videos as evidence where needed

Technician looks over the summarized inspection adding/editing notes & photos

Technician **Finishes Inspection** & sends it to the Service Advisor

Technician is taken back to the dashboard in AutoServe1, and moves on to their next vehicle

Service Advisor looks over the completed inspection, requesting further information from the Technician as needed

The completed inspection is sent to the customer via phone/email

Service Advisor speaks to the customer via phone or with the messaging app

If **approved**, the inspection is sent back to the Technician to complete the work.

If **not approved** - or no additional work is needed - the customer will collect their vehicle, and the ticket can be archived.

Service Advisor

Technician View

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Click here to view the Technician training video.

AutoServe1

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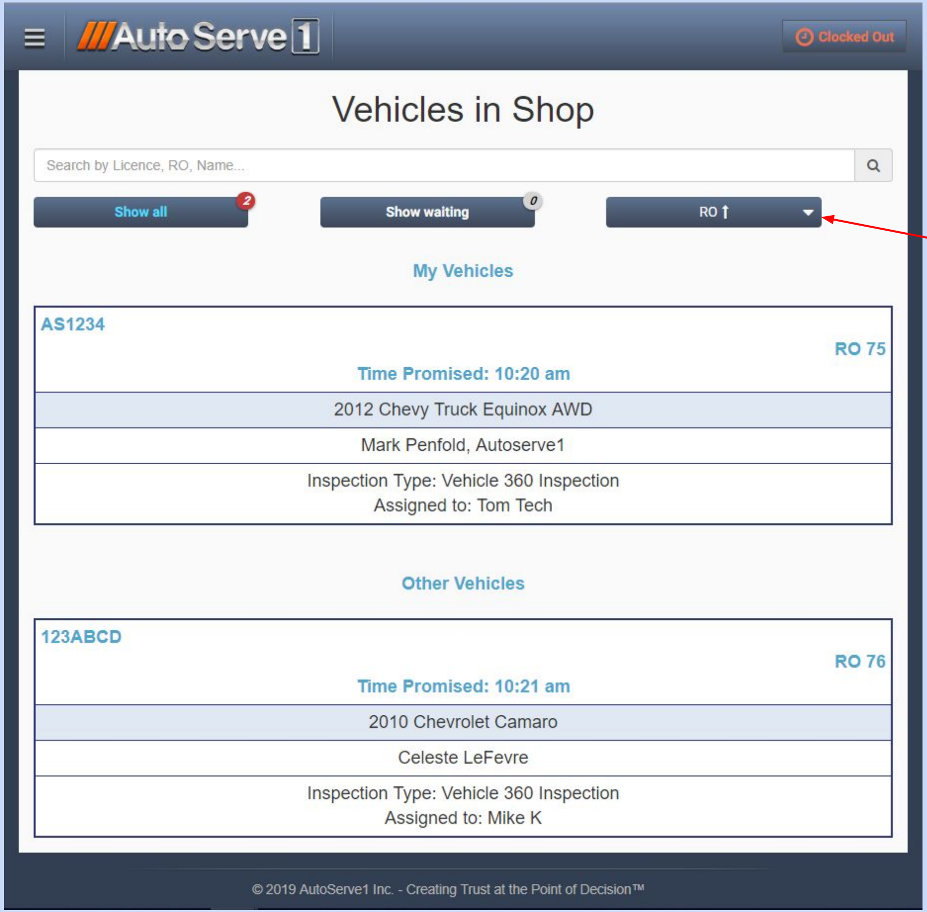
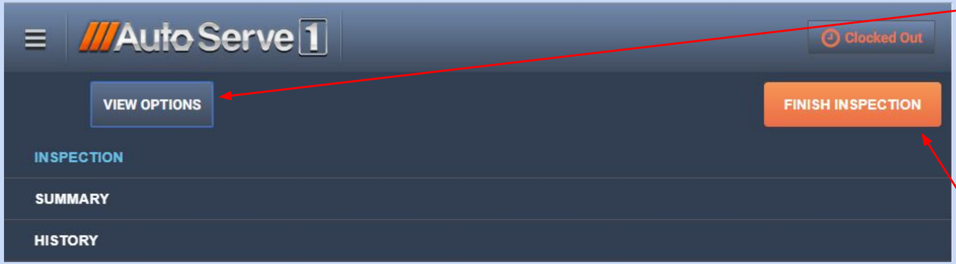
Technician View - Dashboard



This is the Technician's dashboard. This will be the page you first see when logging into AutoServe1 as a Technician.

- Vehicles assigned to you will populate under the 'My Vehicles' header
- All other vehicles in store, but not assigned to you, will appear under the 'Other Vehicles' header.
- You can adjust the order of your vehicles in the dashboard by clicking this dropdown menu and selecting the most relevant option.
- You can use the search function to locate a vehicle using their Licence plate, RO number, or the customer's name.
- Vehicles that are mid inspection will have a note beneath stating **In Progress**. Vehicles that the Technician has clicked 'Finish Inspection' on will have a note beneath stating **Inspection Complete**.

Technician View - *View Options*



View Options
Opens up the different tabs with which to navigate through the Inspection Process

- **Inspection** - Goes to the inspection tabs so the technician may start & finish the inspection
- **Summary** - opens up Summary Page for the technician to look over the inspection summary
- **History** - Able to see the entire digital inspection history of the vehicle
- **Finish Inspection** - Only available to Technicians. Finishes the inspection & alerts Service Advisors.

Inspection Tabs

- These tabs are only viewable when under the 'Inspection' Tab. These will also be available abbreviated at the top of the screen for simple navigation.
- Clicking the Arrow button will expand the tabs so you can read the entire tab name
- You can click through any of these tabs to jump to that specific part of the inspection.

Technician View - *Vehicle Details Page*

Vehicle Details

This is the vehicle profile page. From here you will see a brief overview of the Vehicle's details before proceeding to the inspection.

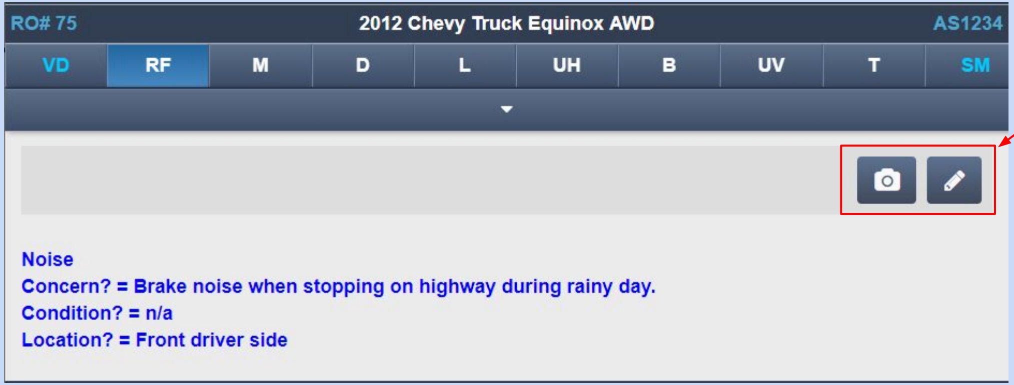
- Here you can add a **profile photo** of the vehicle. Please remember you can only add **ONE** photo on this page & are unable to annotate it.
- If you have not entered your **VIN** previously, you are able to scan it in with the AutoServe1 VIN scanner (not pictured) if you have it installed. *It will be located below 'Add Photo' and above Enter VIN on the page.* Alternatively, you may type the VIN in here.
- If you have not added in your mileage previously, you can enter it in here.
- You can also Import your **Hunter Data** if you have a Hunter Quick Check machine integrated with AutoServe1.

Additional Details

Listed below the mileage will be the **Additional Details.** If the VIN has been decoded, some of the information will already be added in. Anything further will need to be completed by your technicians.

It's important to remember that all 'Additional Details' are automatically - and permanently - saved in AutoServe1. This means that the information only needs to be input once, and each time the vehicle returns, the information will automatically populate.

Technician View - *Reasons for Today’s Visit*



Reasons for Today’s Visit

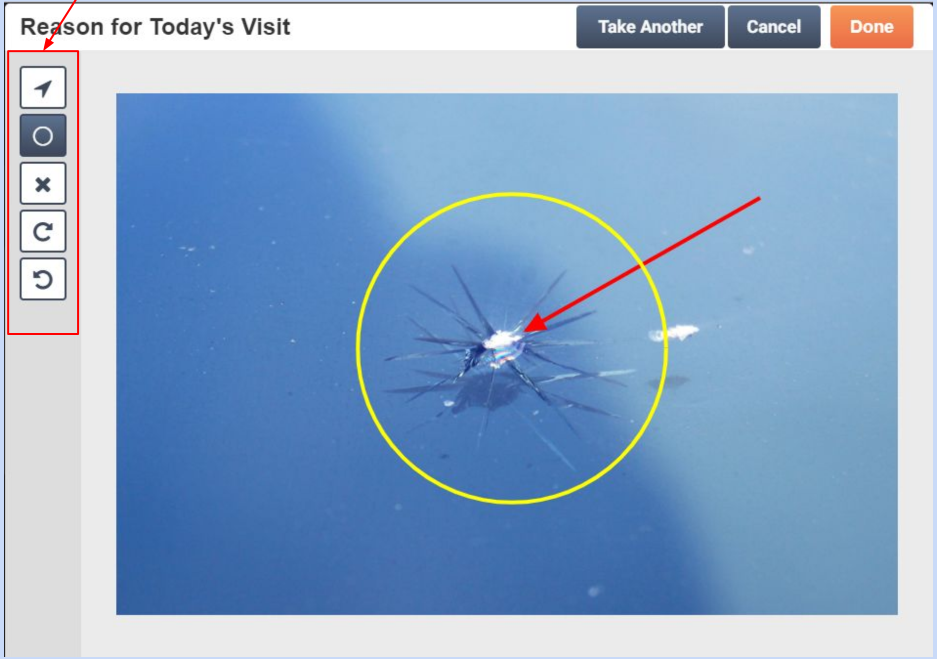
This is where the notes from the Service Advisor will be outlining the reason that the customer chose to bring their vehicle in today.

- From this page onward, you can add in as many photos, videos, and notes, as you need to for the duration of the inspection.
- Because of this, it is on this page we recommend doing your vehicle 360 check, taking note of any dents, scratches, chips etc. for which your customer may hold you liable.
- In addition, you can add in photos, and notes, relating to the reason for today’s visit, as this is what it will appear under on the customer’s report.
- You can also add in general notes & comments here for both your Service Advisor, and customer.

Technician View - *Adding Photos & Notes*

Annotations - Can be added by holding your finger on the point of origin and dragging outward

- **Arrow** & **Circle** Annotations
- **X** to delete annotations
- Rotate photo button to rotate the photo



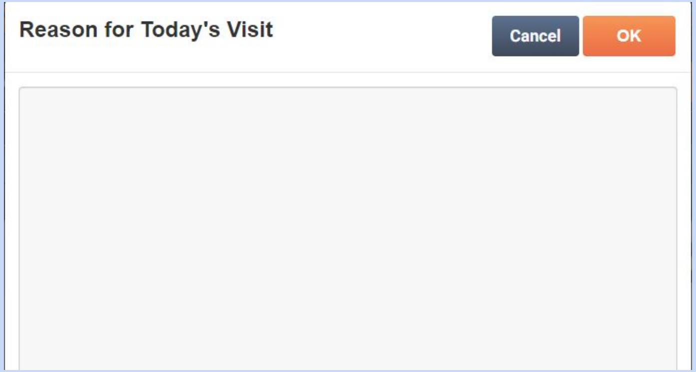
Adding Photos & Notes
After the vehicle details page, you can add in as many photos as you like to illustrate your findings and recommendations. Photos and notes have the following restrictions:

- **Photos** - no limitations and are able to be annotated
- **Videos** - 15 second limit per video. Can add as many 15 second videos as needed. No annotations available.
- **Notes** - As many notes as needed.

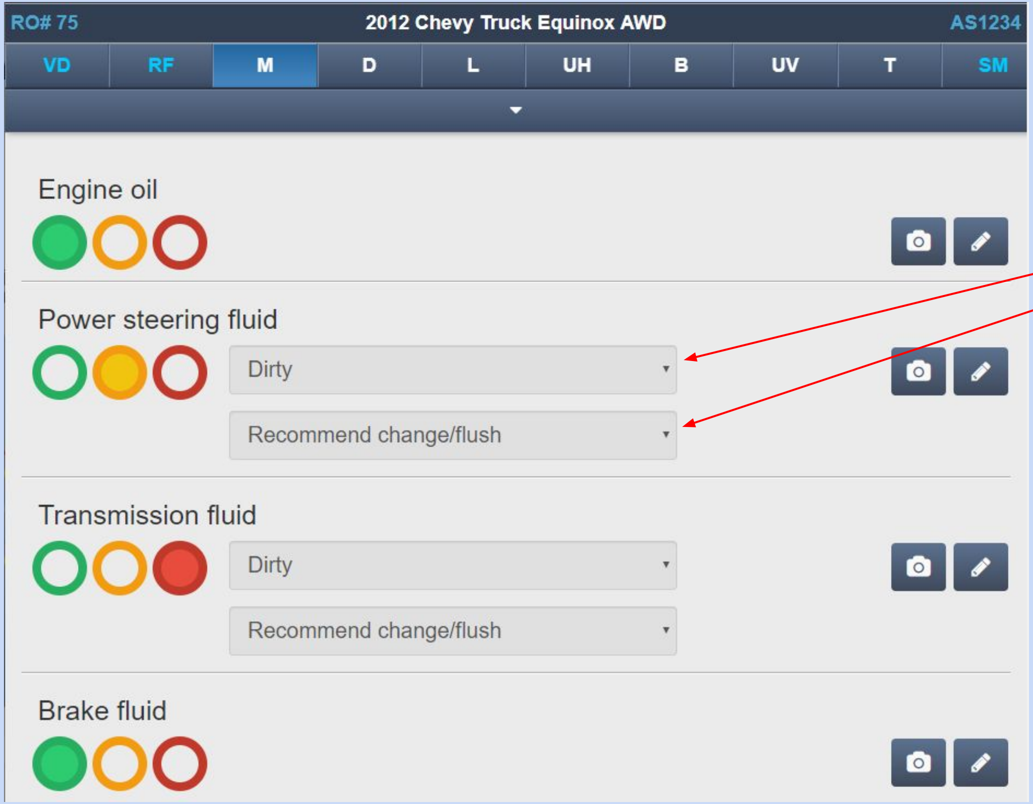
Photos will be time-stamped for the customer, and can have captions and notes added to them by the Service Advisor.

Notes are also viewable to the customer so keep this in mind when adding them in.

Notes



Technician View - *Inspection Items*



In the inspection, each item carries three severities. They are outlined below:

- **Green -** There is nothing wrong with the item
- **Yellow -** There is an issue that needs to be addressed, but it is not urgent
- **Red -** There is a critical issue with the item that needs to be addressed urgently.

After a **Yellow** or **Red** severity is selected, two dropdowns will appear. They are as below

- **Finding** - What is the issue with the line item?
- **Recommendation** - What is the best recommended course of action to deal with the issue?

In every drop down box, there is an option for **Multiple**, which allows you to select more than one finding, and **Other**, which allows you to type in your own finding/recommendation.

You can add in as many photos, videos, and notes as you like to the line item to support your findings.

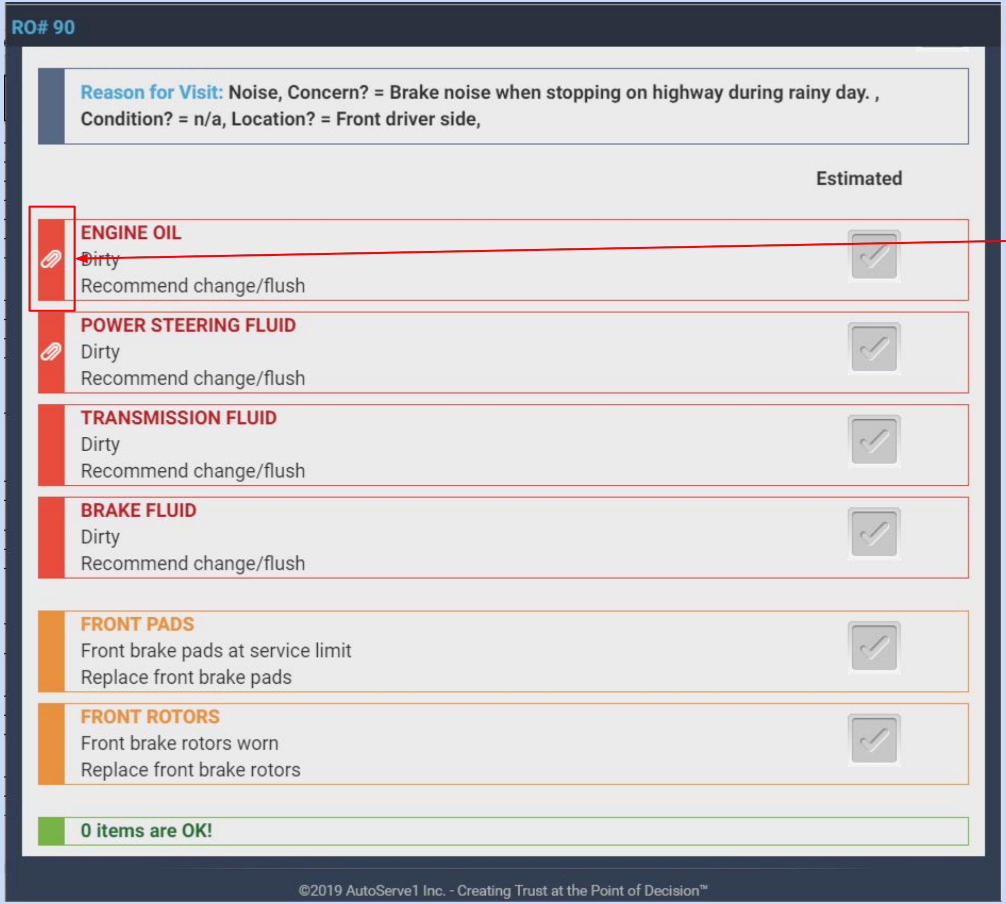
Any item with no severity selected will not appear in the customer's report. This means you can skip over any items not relevant to the customer's vehicle. If you accidentally click on a severity on an irrelevant item, clicking again on the same severity will remove it.

Technician View - *Scheduled Maintenance*

Scheduled Maintenance Tab

- If your VIN has been entered - and decoded - this information will fill in from Alldata.
- In addition, if your mileage has been placed in, you will be taken to the next scheduled maintenance check for this vehicle.
- This is a reference guide to see what inspections, tests, and replacements are due next on your vehicle.
- You can also skip ahead, or backward, to see what's due in the future, or what should have been completed in the past at the appropriate mileage intervals.

Technician View - *Summary*



Summary Page

This provides you with an overview of all severity items checked off in the course of your inspection. These are arranged from **Red** to **Yellow** to **Green**.

- All findings and recommendations will appear under the inspection item.
- Anything with a **paperclip** next to the item name has a measurement, note, or photo attached to it. If you click on the paperclip, the item will open up for you to review this information.
- You will need to click to expand to view any **Green** items.
- Once the Service Advisor has approved or declined the work, that information will be available here.

Technician View - *Complete*

Once the Inspection has been completed, the Technician hits the Finish Inspection button.

- They will be taken back to the dashboard, where their most recently completed inspection will show up as ‘Completed’.
- Any currently in the midst of the inspection will show up as ‘In Progress’.
- They can then progress to their next vehicle.

Service Advisor View

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Before Inspection

After Inspection

Click here to view the Service Advisor training video

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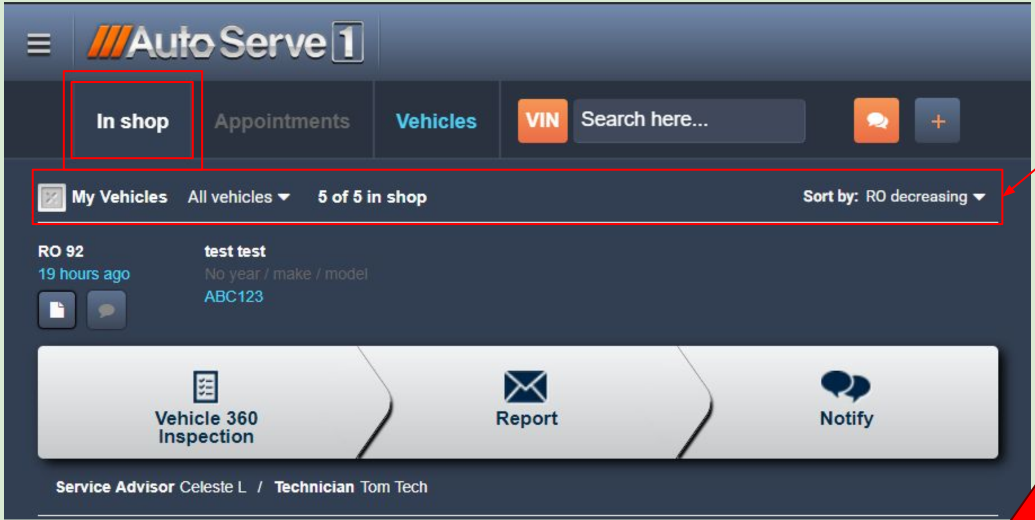
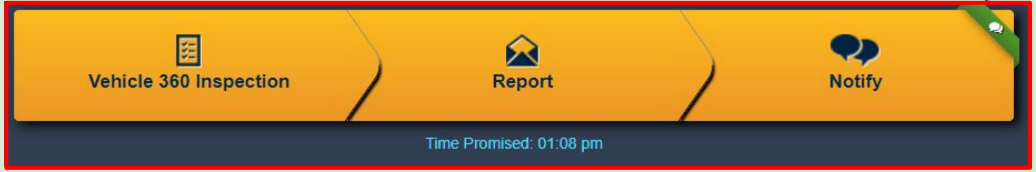
Service Advisor View - In Shop Tab





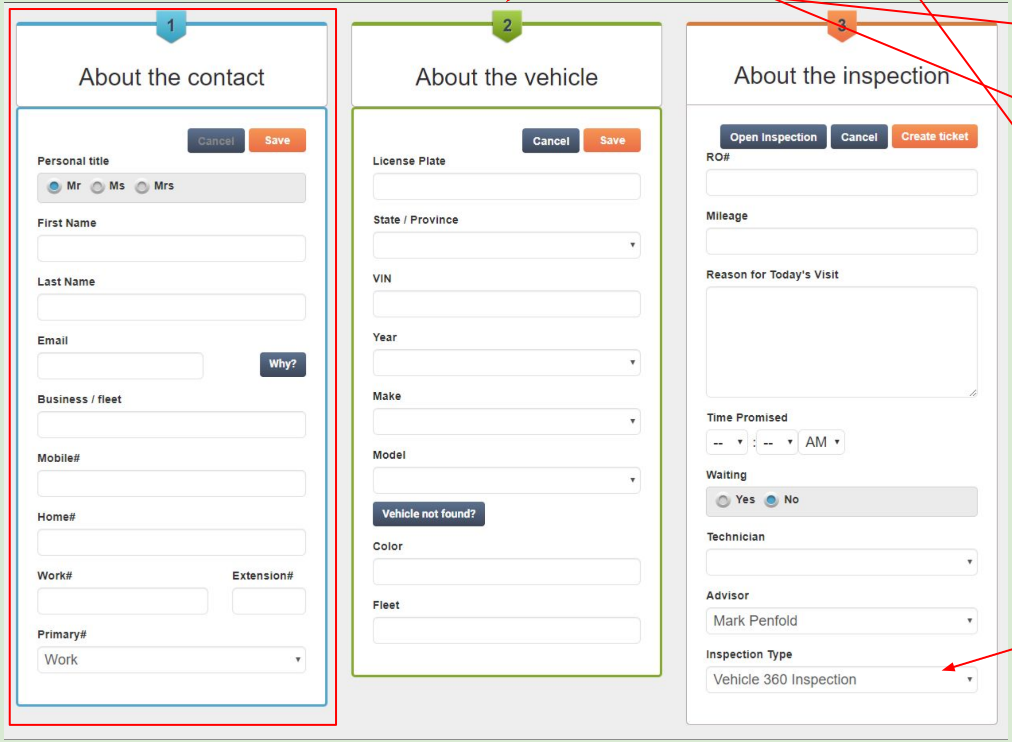
Service Advisor Dashboard - In Shop Page

- All vehicles will show in the dashboard that have had tickets created with an AutoServe1 Digital Inspection added.
- Vehicles can be filtered to show only those assigned to yourself, or all vehicles. It can also be arranged by RO number, to show waiting customers first, etc.

You can check the progress of a Work Order at a glance by checking the three boxes under the RO.

- The first box contains the **Inspection**. It lists the Inspection name, and will show up as half-coloured when the technician has started the inspection, and fully coloured when the technician has completed the inspection. This is typically used by the **Technician.**
- The **Report Box** is where you click to prepare, preview, and send the Inspection report to the Customer. If the report is being prepared, it will be half-coloured.
- Once the **Report** has been sent, it will be completely coloured. In addition, the envelope shows whether or not the customer has viewed the report. It will be **closed** prior to them viewing it, and **open** when they have viewed it.
- The **Notify** button is used to send the customer a message to let them know their vehicle is ready for pickup. Once the customer has been notified, a ribbon will appear on the Notify box to show that the message has been sent.

Service Advisor View - Pre-Inspection

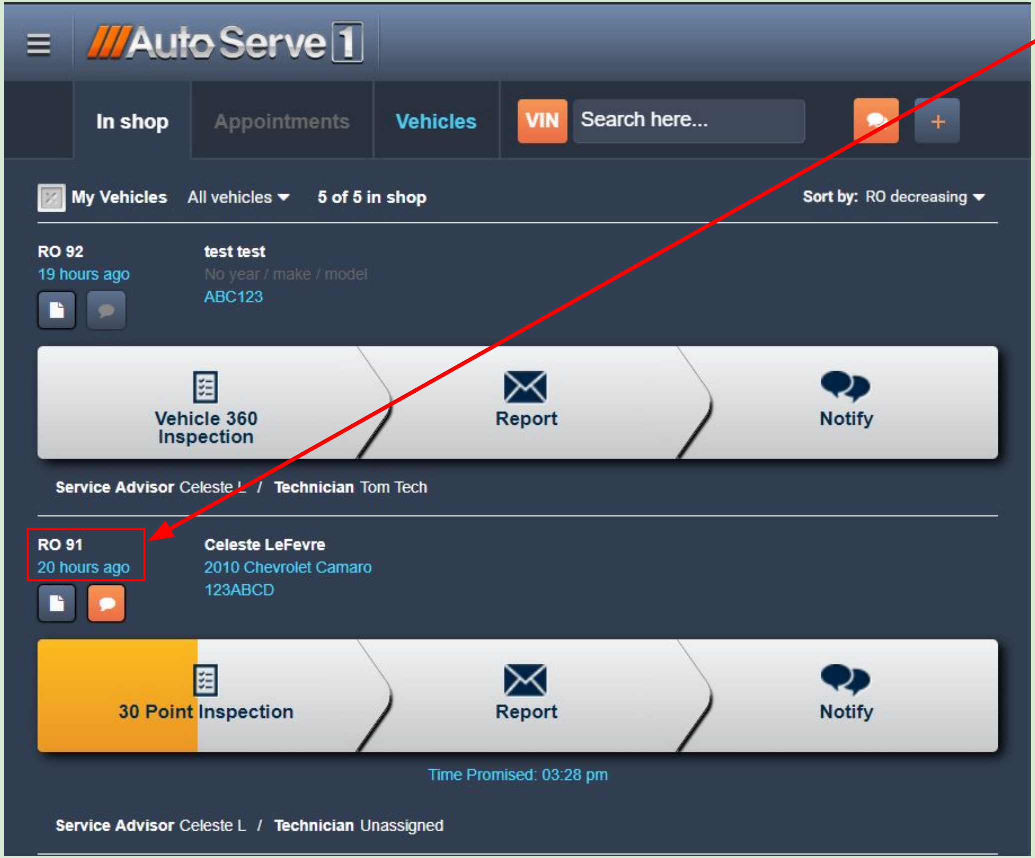


Creating a ticket in AutoServe1*, or preforming a CarSide Check-In

- **About the contact**
  - Fill out all of the information in this section, minimum requirement is first name, and last name initial. Hit save.
- **About the vehicle**
  - Fill out all of the information in this section, there is no minimum requirement. You can **scan the vin** on your tablet from the dashboard page, and it will decode here. Hit save.
- **About the inspection**
  - Fill out all of the information in this section. Assign your technician and service advisor to the work order. Select your desired inspection from the **drop down menu**. (*Also see editing inspections from dashboard*)

* NOTE: If your shop management system integrates with AutoServe1 the client, contact, vehicle, and work order/inspection information will automatically populate into AutoServe1 and appear on your dashboard after you save the work order in Protractor.NET

Service Advisor View - Pre-Inspection



Editing Inspections from the Dashboard

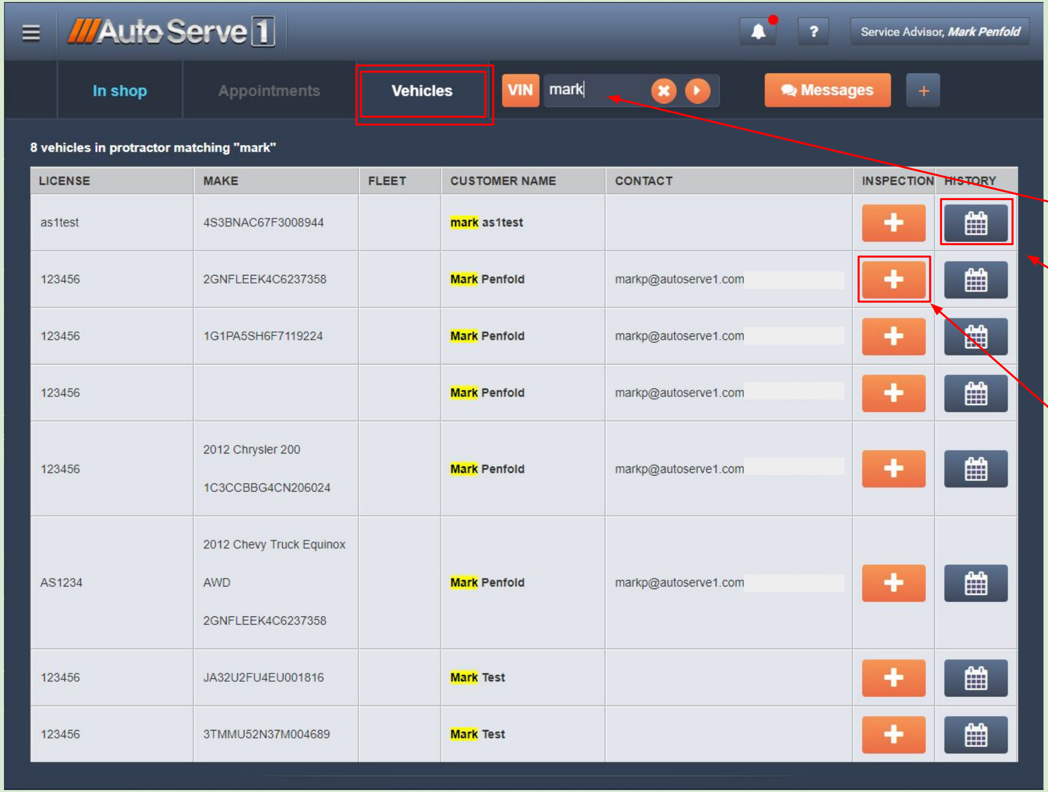
Once a repair order has been placed into the dashboard, you are still able to make adjustments to the Repair Order prior to the inspection being started.

To do this, please click on the Repair Order Number located on the left hand side of the screen. This will open up the ticket information as seen on the previous screen.

From here you can do the following:

- Update the customer details, including with mobile number for two-way texting to be enabled
- Add/Edit the Vehicle Details
- Update the ticket information (i.e. if the customer is now waiting, the time promised to be returned to the customer, the reasons for today's visit, etc.)
- You can also assign this to specific technicians and service advisor's, as well as change specified inspection.
- **Note with Node Integrations**: When a ticket comes across from your SMS to AutoServe1, it will have the default inspection attached. You will need to update it - if necessary - through here.

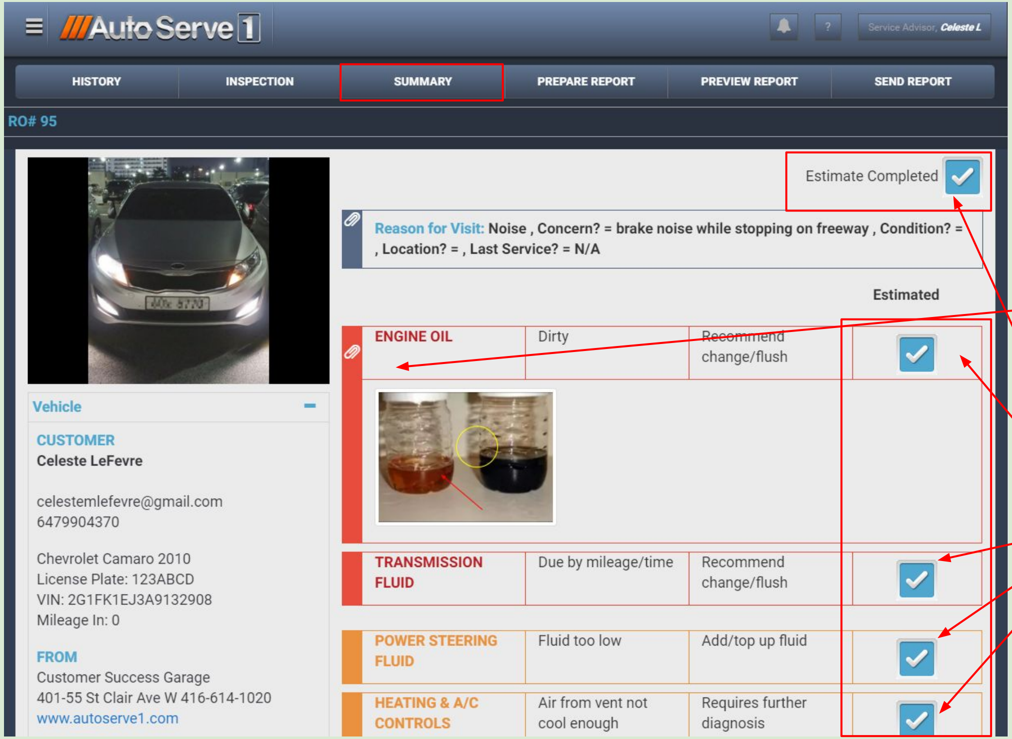
Service Advisor View - Pre-Inspection



Navigating the <u>Vehicles Tab</u>

- To search vehicles that have previously been in your shop, type in your customer's name, license plate, or VIN into the **search bar** and hit enter.
- To reveal the Vehicle History click on the **Calendar Icon**, and you will be redirected to the most recent instance of the vehicle in the shop, and have the ability from there to navigate to all Historical Inspection on this particular vehicle.
- You can create a new work order under your existing clients vehicle profile by clicking the **Plus Button.**

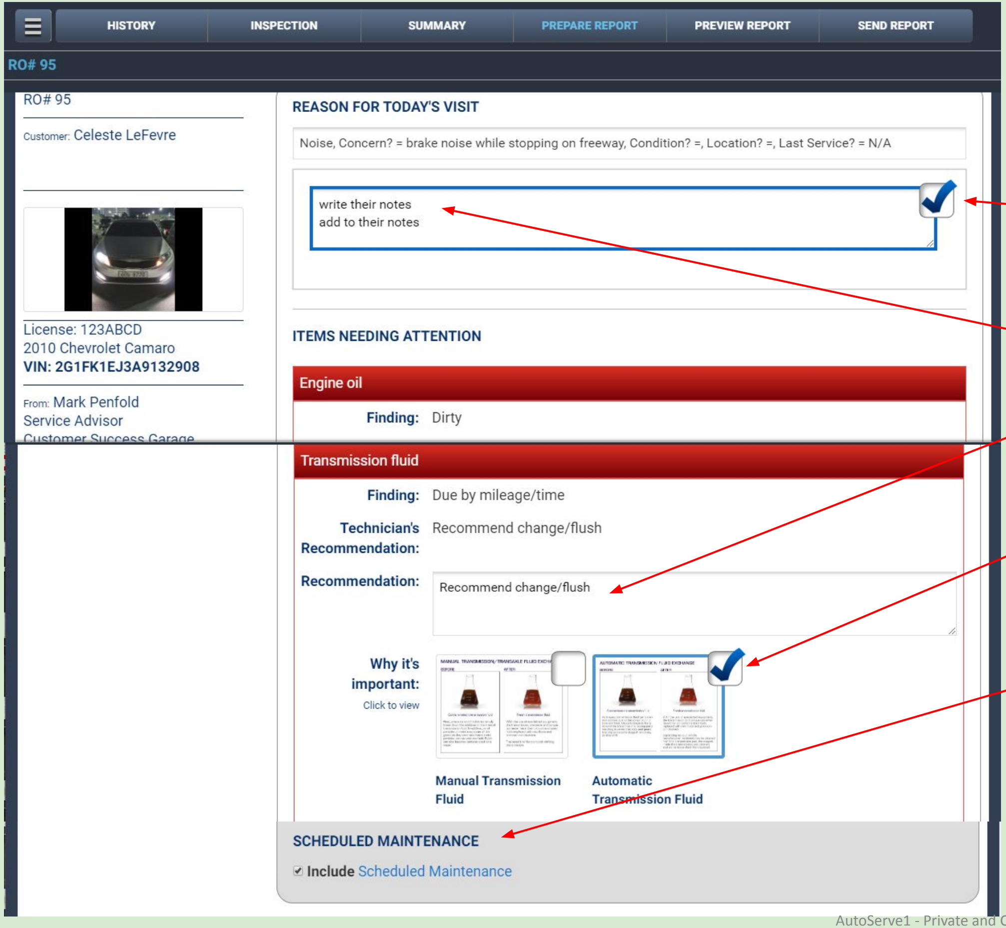
Service Advisor View - Post-Inspection



Navigating the <u>Summary Tab</u>

- In this tab we are able to view the results of the inspection completed by the technician
- Pro Tip: Any item with a **RED** or YELLOW severity should have a photo, video or note from the technician
  - You can see whether the technician has added a photo, video or note by the appearance of a paper clip next to the item. Click the paperclip to reveal the attachment
- In this tab you will indicate whether or not your estimate has been completed. Estimate creation will vary based on your shop management system.
- Once you have completed your estimate, check off each item you have estimated, or if you have estimated all items check off the Estimate Completed box and it will automatically check off all items, and bring you into the Prepare Report tab

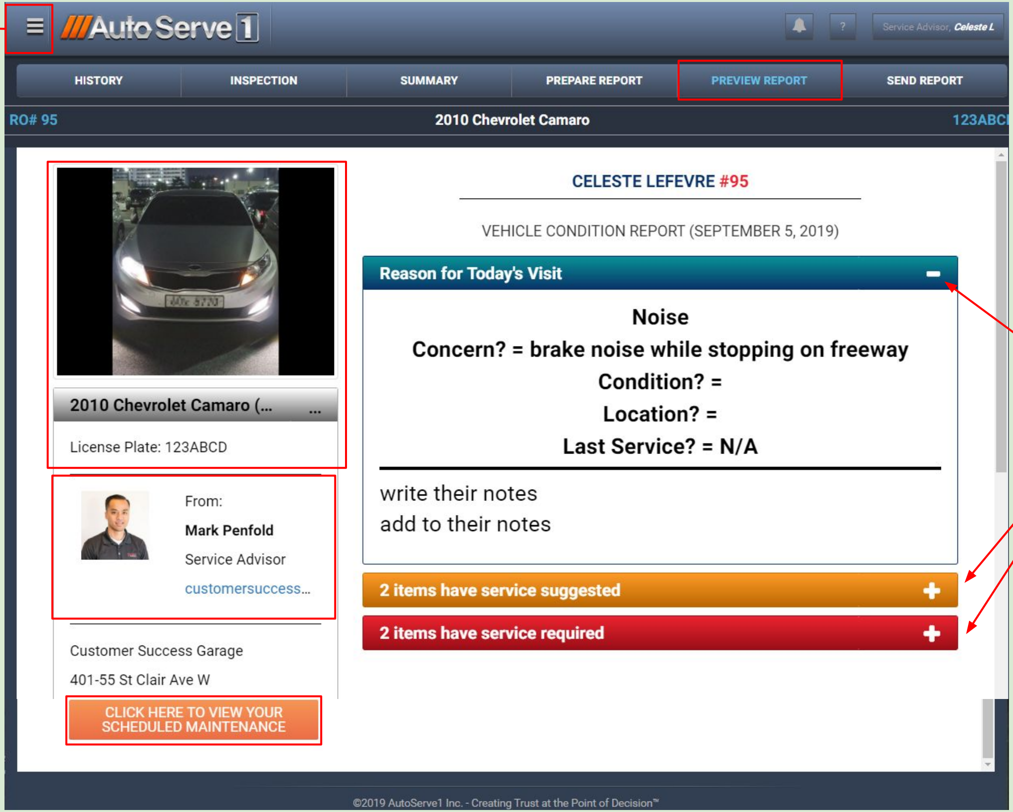
Service Advisor View - Post-Inspection



Navigating the Prepare Report Tab

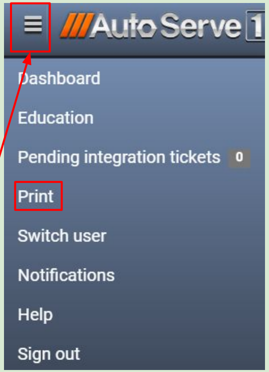
- In this tab you have the ability to review and edit the technician's findings and recommendations
  - Choose to include or disclude the technician's notes in the customer's report by checking or unchecking the small box in the top right corner of the text box.
  - Editing Notes: Here is where you can add to or edit the technician's notes and recommendations
  - Choose to include or disclude the education in the customer's report by checking or unchecking the small box in the top right corner of the image.
  - Chose to include or disclude the vehicle's *scheduled maintenance*

Service Advisor View - Post-Inspection



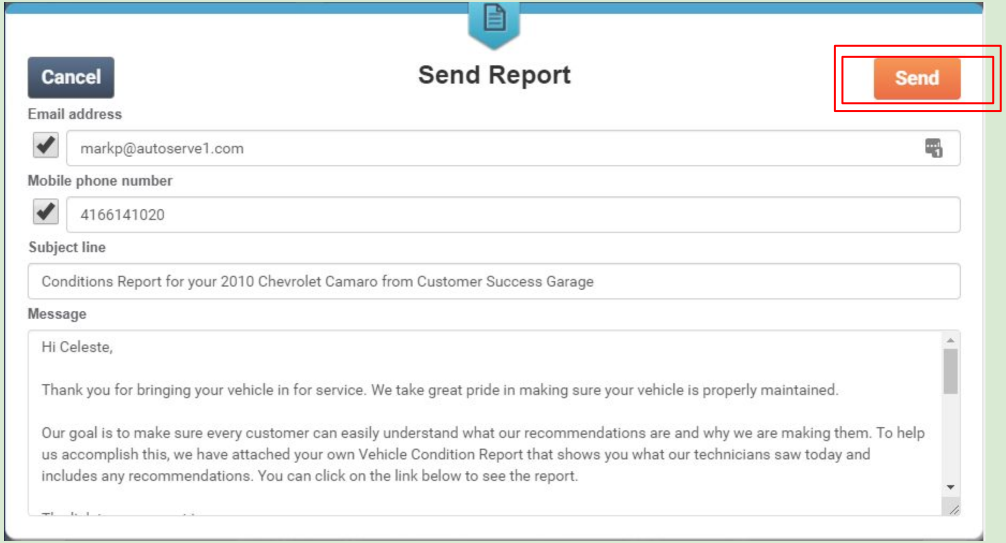
Navigating your Preview Report tab

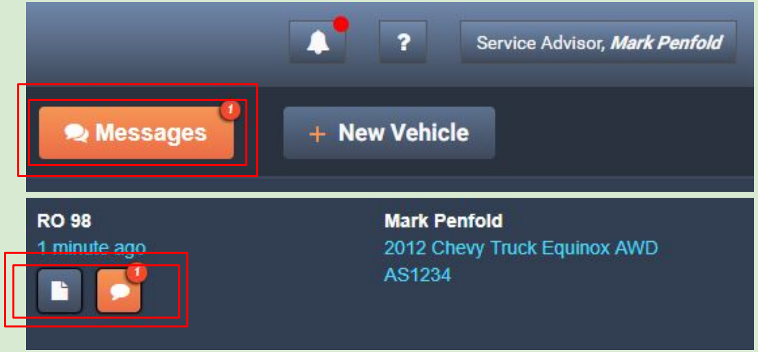
- Your preview report tab is where you view the inspection report just as your customer would.
- You want to ensure that you have included:
  - The vehicle profile picture and correct details
  - The name of the staff members that performed the inspection along with their photo
  - The scheduled maintenance button if you have selected to include the scheduled maintenance in the Prepare Report tab
- All of your notes, findings, and recommendations can be expanded by clicking the plus button (+) on you desired severity, and hidden by clicking the minus button (-)



From the hamburger dropdown menu on this page you have the ability to print the report, just as it appears, by clicking the **Print** button

Service Advisor View - Post-Inspection





Sending the Report

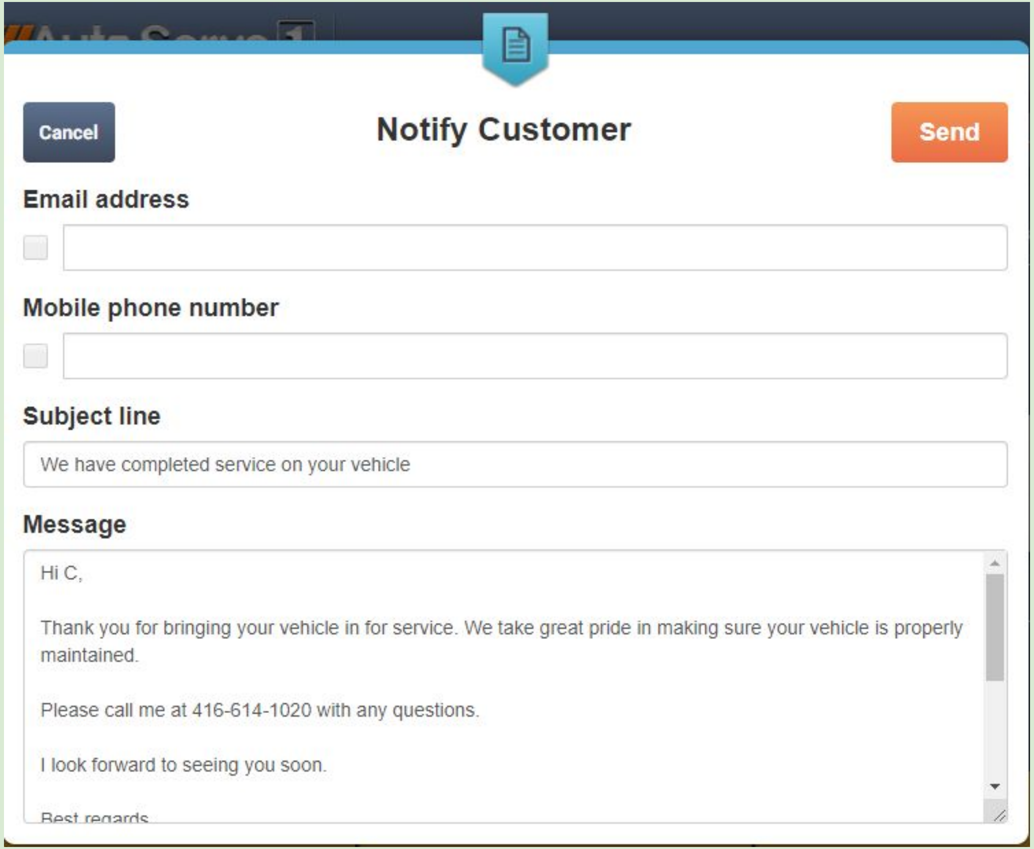
When you are ready to send your report, click **'Send Report'**. This will open up the Send Report box.

- The email address and mobile number will auto-populate if they have been placed into the contact information.
- You are able to edit the subject and message from here with any customer specific information you'd like to include.
- You can send this report via email, text message or both. When you are ready, hit **'Send'**.
- If the customer replies via email, the email will be sent to the email contained in your **Store Details** inside of your admin portal.

Two Way Texting

- If you have the function enabled - and your customer has a mobile number filled into that contact field - you are able to communicate with them through AutoServe1's texting application.
- Once you have sent the report, the customer can simply reply via text message to ask for estimates, approve work, or request further information.
- You will be notified of any reply messages via the dashboard, with a number showing in both the 'Messages' option at the top of the page, and underneath the customer's RO number. Clicking either of these will give you the option to view, and reply to the message.
- If you would like to ***purchase*** the two-way texting feature, please contact the Customer Success Team at 1800-268-3437.

Service Advisor View - Post-Inspection



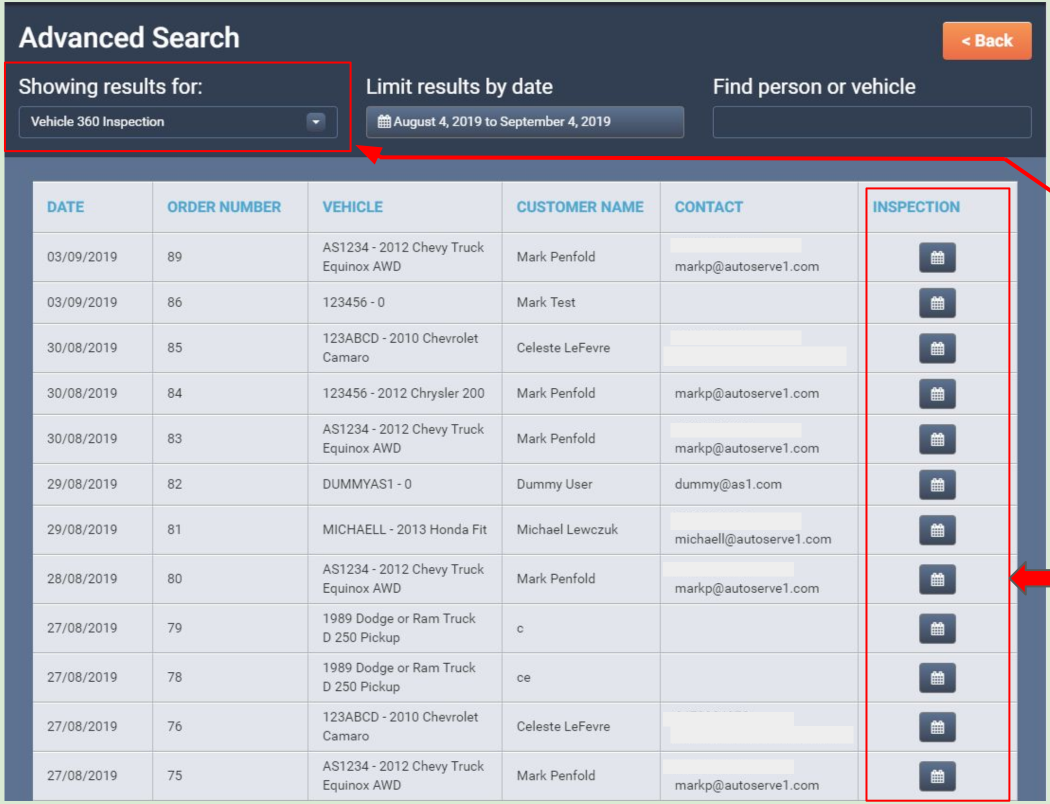
Notify Customer Tab

Once the car has had all of its services completed, it is ready for pickup by your customer. You can simply click the **Notify** tab on your dashboard to bring up the Notify Customer option.

This will open up the Notify customer dialogue box.

- Much like the 'Send Report' option, the email address and phone number will auto-populate if it is included within the client's profile.
- You can make adjustments to the message, and hit **Send** when ready.
- After you have sent the customer the notification, the notification tab will be completely coloured in, and have a green ribbon appear across it. This will show you at a glance that the customer has already been notified to pick up their vehicle.

Service Advisor View - Additional Features



DATE	ORDER NUMBER	VEHICLE	CUSTOMER NAME	CONTACT	INSPECTION
03/09/2019	89	AS1234 - 2012 Chevy Truck Equinox AWD	Mark Penfold	markp@autoserve1.com	
03/09/2019	86	123456 - 0	Mark Test		
30/08/2019	85	123ABCD - 2010 Chevrolet Camaro	Celeste LeFevre		
30/08/2019	84	123456 - 2012 Chrysler 200	Mark Penfold	markp@autoserve1.com	
30/08/2019	83	AS1234 - 2012 Chevy Truck Equinox AWD	Mark Penfold	markp@autoserve1.com	
29/08/2019	82	DUMMYAS1 - 0	Dummy User	dummy@as1.com	
29/08/2019	81	MICHAELL - 2013 Honda Fit	Michael Lewczuk	michaell@autoserve1.com	
28/08/2019	80	AS1234 - 2012 Chevy Truck Equinox AWD	Mark Penfold	markp@autoserve1.com	
27/08/2019	79	1989 Dodge or Ram Truck D 250 Pickup	c		
27/08/2019	78	1989 Dodge or Ram Truck D 250 Pickup	ce		
27/08/2019	76	123ABCD - 2010 Chevrolet Camaro	Celeste LeFevre		
27/08/2019	75	AS1234 - 2012 Chevy Truck Equinox AWD	Mark Penfold	markp@autoserve1.com	

Advanced Search

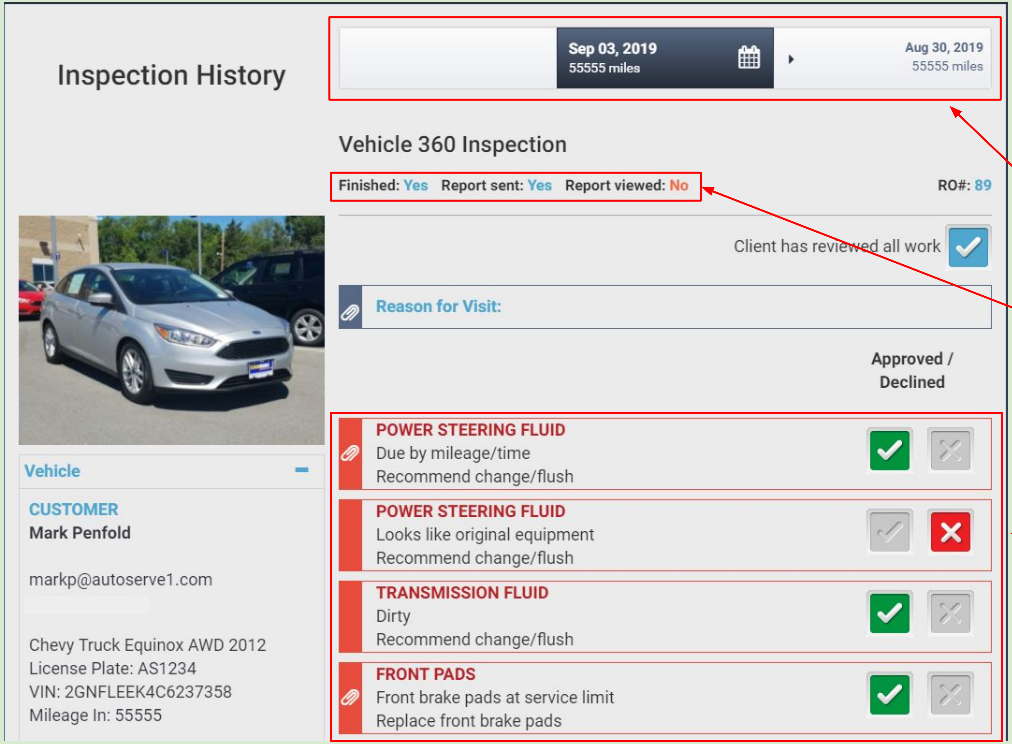
The advanced search function allows you to locate any previous AutoServe1 inspection that has been archived from your dashboard.

- **Showing results for** - This will default to the inspection that has been set as your default within the admin portal. Opening this drop down menu will give you the option to select a different inspection - OR - select all inspections.
- **Limit results by date** - You can set any custom date range via this drop down
- **Find person or vehicle** - You are able to search by RO number, vehicle information (license plate, etc.) customer name, or contact information.

Once you have located the specific inspection, selecting the Calendar icon under the ‘Inspection’ column will open up that inspection.

Utilizing this feature, you can locate, go over, and re-send any of these previous inspections.

Service Advisor View - Additional Features

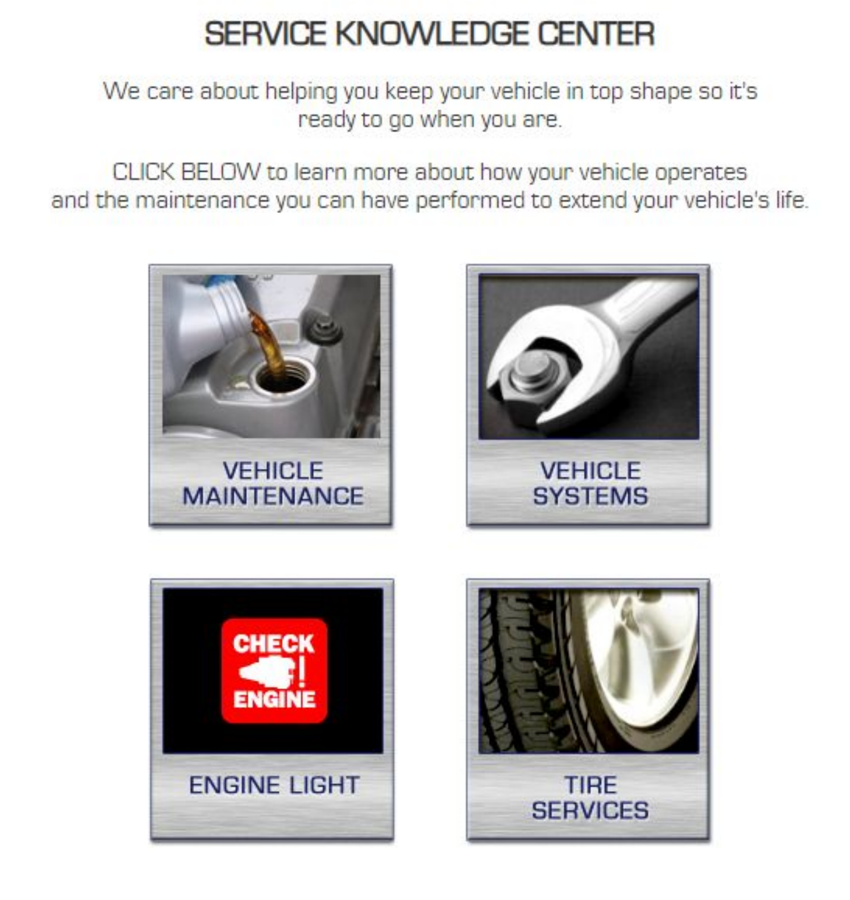


Vehicle Inspection History

Any inspection that has been archived from the AutoServe1 dashboard will show up in the vehicle's digital inspection history. You can access the history from within a new inspection, through the search function in your dashboard, or via the Advanced Search feature.

- The history will open up the most recent digital inspection. You can cycle through to all previous inspections through the panels at the top.
- This history will show up whether the report was finalized, sent, and viewed by the customer.
- Any photos, notes, and measurements from the inspection will be included. These will be differentiated with the paperclip icon located next to the inspection item.
- You are also able to see if the customer has reviewed the work, and what suggested work was approved, or declined, for each red and yellow severity item.

Service Advisor View - Additional Features



Educations

- Educations are short pictures, or gifs, that can be included on a customer's report to explain how certain parts contribute to their vehicle running smoothly, or why certain services are important to the health of their vehicle.

- Education items will automatically pop up in the Prepare Report page, with the option of including these with a simple click. If included, they will appear on your customer's report next to your findings and recommendations.

- You can view the entire library of educational content by selecting **'Education'** from the Hamburger dropdown menu. From here you are able to familiarize yourself with all educational content.

Important Links & Contact Info

- Login Page - Login to AutoServe1
- Zendesk - Log a Technical Support Ticket
- Knowledge Base - Read our FAQs, troubleshooting guides, and a range of training videos
- Training Portal - View training videos, or register for training
- Tablet Applications - Download the VIN Scanner & Chrome on your tablet

If you have any questions, need assistance with AutoServe1, or would like to book additional training, please contact the customer success team.

📲 1-800-268-3437 extension 4

📧 customersuccess@autoserve1.com

Creating Trust at the Point of Decision™