

Auto Integrate User Guide

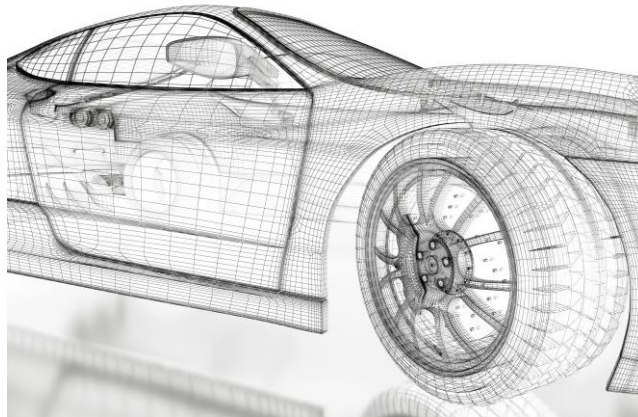


Table of Contents

| | |
|--|----|
| Repair Order Manager | 2 |
| The Filter Panel | 2 |
| Repair Order Status | 3 |
| Repair Order Manager | 4 |
| Step 1: Select Vehicle | 4 |
| Step 2: Enter Odometer Reading..... | 5 |
| Step 3: Shop Details | 6 |
| Preventative Maintenance | 7 |
| Adding Repair Items | 8 |
| Adding Quick Repair Items | 12 |
| Adding Tires | 13 |
| Adding items from Catalog (National account billing) | 16 |
| Quick-reference icons | 17 |
| Item Rejection..... | 19 |
| Resubmitting a Repair Order..... | 19 |
| Repair order details..... | 22 |
| Status Icon Guide..... | 23 |

Repair Order Manager

Once you are logged in, you will be taken straight to the Repair Order Manager page. This instantly gives you an overview of all current and completed Repair Orders.

The navigation is available on every page, so no matter where you are in the system, you can always return to the Repair Order Manager page.

The Filter Panel

Filtering out certain Repair Orders, or searching for specific ones can all be achieved via the filter panel. It allows you to search for specific repair orders using the filter criteria. To see all repair orders, click "View All".

Repair Order Status

Quick-reference icons

To get you started quickly, there are a series of icons in the status column provided to speed up the process. The key to the status icons are at the back of this document.

Find Existing Repair Orders

| | | | | | |
|----------------|----------------------|------------------|----------------------|---------------|----------------------|
| RO ID | <input type="text"/> | Status | Active | VIN | <input type="text"/> |
| Driver Name | <input type="text"/> | RO Creation Date | <input type="text"/> | License Plate | <input type="text"/> |
| Shop Reference | <input type="text"/> | | | | |

Search
View All

| RO ID | VIN | Origin | Client | Due | Submitted | FM Company | Make | Model | Status | |
|--------|--------|--------|-------------|--------------|---------------------|------------|-------|--|--------|----------------------|
| 139858 | 032148 | | Demo Client | 317d 20h 0m | 11/11/2014 04:38 AM | Enterprise | Toyot | PreRunner (A4) 4x2 Double Cab 127.4 in. WB | | VIEW |
| 139847 | 032148 | | Demo Client | 357d 22h 45m | 09/17/2014 08:30 AM | Enterprise | Toyot | PreRunner (A4) 4x2 Double Cab 127.4 in. WB | | VIEW |
| 140988 | B33891 | | Demo Client | 118d 20h 0m | 05/22/2015 04:54 AM | EMKAY | Ford | ESCAPE XLT 4WD | | VIEW |
| 140897 | 204868 | | Demo Client | 295d 15h 45m | 12/03/2014 03:41 AM | EMKAY | Ford | TAURUS SEL | | VIEW |
| 140888 | 186683 | | Demo Client | 310d 8h 45m | 11/18/2014 09:56 AM | Enterprise | Chevr | LS 4dr Sedan | | VIEW |
| 141370 | 150441 | | Demo Client | 8d 14h 30m | 09/16/2015 09:10 AM | EMKAY | Chevr | 1500 EXT CAB | | VIEW |
| 141344 | C08014 | | Demo Client | 13d 15h 45m | 09/11/2015 06:47 AM | EMKAY | Ford | F150 SUPERCAB | | VIEW |
| 141323 | B33891 | | Demo Client | 28d 16h 0m | 08/27/2015 07:00 AM | EMKAY | Ford | ESCAPE XLT 4WD | | VIEW |
| 141322 | 530717 | | Demo Client | 28d 12h 45m | 08/27/2015 06:51 AM | EMKAY | Merce | SPRINTER 2500 | | VIEW |
| 141295 | B33891 | | Demo Client | 34d 15h 0m | 08/21/2015 04:53 AM | EMKAY | Ford | ESCAPE XLT 4WD | | VIEW |

<
1
2
3
4
5
6
7
8
>

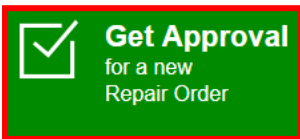
Information is provided by hovering over the icon. Click View to see the full detail of each Repair Order.

Create New Repair Order

Repair Order Manager

Gaining approval for a repair order is quick and simple. From the Repair Order Manager screen, click the Add New Repair Order button.

[View / edit all your repair orders here](#)



Find Existing Repair Orders

| | | | | | |
|----------------|----------------------|------------------|---|---------------|----------------------|
| RO ID | <input type="text"/> | Status | Active ▼ | VIN | <input type="text"/> |
| Driver Name | <input type="text"/> | RO Creation Date | <input type="text"/> | License Plate | <input type="text"/> |
| Invoice Number | <input type="text"/> | | | | |

Search
View All

Step 1: Select Vehicle

Search for Vehicle

Select fleet company, enter VIN and press Search.

| | | | |
|---------------|--|-----|----------------------|
| Fleet Company | <div style="border: 1px solid #ccc; padding: 2px;"> Select One ▼ <ul style="list-style-type: none"> <li style="background-color: #0056b3; color: white; padding: 2px;">Select One <li style="padding: 2px;">Car Advise <li style="padding: 2px;">Donlen <li style="padding: 2px;">EMKAY <li style="padding: 2px;">Enterprise Fleet Management <li style="padding: 2px;">Fleetio <li style="padding: 2px;">U.S. Bank Voyager Non-FMC </div> | VIN | <input type="text"/> |
|---------------|--|-----|----------------------|

Search
Add New

Choose the Fleet Management Company which manages the vehicle, then enter a minimum of the last 8 characters of the VIN. Click Search to find the vehicle.

Once you have put in the detail, and clicked 'Search', a list of vehicles will appear below. From the list displayed, select the correct vehicle by clicking on the full VIN

| VIN | License Plate | Make | Model Code | Model Description | Client |
|-------------------|---------------|-----------|------------|-------------------|-----------------------------|
| 0XXXX00X00X000000 | 00XXX0 | Chevrolet | CK15553 | 1500 EXT CAB | Demo Client |

Step 2: Enter Odometer Reading

Enter the vehicle's odometer reading into the field provided and click 'Next'. You can cancel the Repair Order by clicking 'Cancel'.

Step 2: Enter Odometer Reading

| Vehicle Details | FMC Details | Client Details | AME Details | Defect History |
|--|-----------------------------------|---------------------------------|--------------------------|--|
| VIN Number 0XXXX00X00X000000 | Driver Name Demo Driver | Model Year 2006 | Make Chevrolet | Model CK15553 - 1500 EXT CAB |
| Color | License Plate AA00001 | Contract Type Managed | Transmission | Fuel Type Gas |
| FMC Vehicle Number A50441 | | | | |

Odometer Reading

If you are repairing a medium to heavy duty truck you will be requested to enter the Engine Hours along with the odometer.

More details on the vehicle, Fleet Management Company and client are available by selecting the tabs.

| Vehicle Details | FMC Details | Client Details | AME Details | Defect History |
|--|-----------------------------------|---------------------------------|-------------|----------------|
| VIN Number 0XXXX00X00X000000 | Driver Name Demo Driver | Model Year 2006 | | |
| Color | License Plate AA00001 | Contract Type Managed | | |

Step 3: Shop Details

Having selected the vehicle and entered the mileage information, you now need to provide some more detail about your shop and the driver.

- **Your Name** is you or the person responsible for the repair. (Required)
- **Invoice Number** is for your internal reference.
- **Driver is Waiting**, check this box if the driver is present and waiting for the repair.
- **Driver Complaint** enter brief details as to why the driver brought the vehicle to you.

Shop Details

Required fields are indicated with a *

| | |
|---------------------------------|--|
| Your Name * | <input style="width: 80%;" type="text"/> |
| Shop Call Back Number | <input style="width: 60%;" type="text"/> ext. <input style="width: 20%;" type="text"/> |
| Invoice Number | <input style="width: 80%;" type="text"/> |
| Vehicle Arrival Date * * | <input style="width: 60%;" type="text"/> |
| Vehicle Arrival Time * * | <input style="width: 60%;" type="text"/> |
| Driver Name | <input style="width: 80%;" type="text"/> |
| Driver Phone Number | <input style="width: 60%;" type="text"/> ext. <input style="width: 20%;" type="text"/> |
| Driver Is Waiting | <input type="checkbox"/> |
| Vehicle Towed | <input type="checkbox"/> |
| Payment Type * | <input type="text" value="Check"/> ▾ |
| Payment Direction * | <input type="text" value="Independent"/> ▾ |
| Driver Complaint | <div style="border: 1px solid #ccc; height: 50px; width: 100%;"></div> |

Continue
Cancel

Click Continue to finish creating the repair order and to start adding items to the Repair Order.

Preventative Maintenance

Some Fleet Management Companies provide the ability to select items from their Preventative Maintenance Programs, the Fleet Management Companies would like you to provide these services.

If you do not charge for any of these items add them with zero cost as this is recorded in the vehicle maintenance history. Some items allow you to change the pricing with the drop-down menu, with each selectable item changing the pricing type.

Preventative Maintenance

Maintenance Program: Test

Our records indicate the following preventative maintenance items are scheduled to be performed.

| Services Due | Pricing | Labor Time | Labor Rate | Cost | Unit Price | Qty | Parts Total | Fixed Cost |
|------------------|-------------------------|------------|------------|------|------------|-----|-------------|------------|
| Cabin Air Filter | Menu Item (Part Only) ▼ | | | | | | | |

Add Items **Close**

Once you have selected the correct pricing type for your shop and have filled in the relevant text boxes, click Add Items to add these to the Repair Order.

Preventative Maintenance

Maintenance Program: Test

Our records indicate the following preventative maintenance items are scheduled to be performed.

| Services Due | Pricing | Labor Time | Labor Rate | Cost | Unit Price | Qty | Parts Total | Fixed Cost |
|------------------|------------------|------------|------------|--------|------------|-----|-------------|------------|
| Cabin Air Filter | Part and Labor ▼ | | | \$0.00 | | | \$0.00 | |

Add Items **Close**

If your shop is unable to provide any of the items listed, just click 'Close'.



Don't forget to add your \$0 items

Adding Repair Items

Once in the repair order you can see the repair order number and status. Any items you added via the Preventative Maintenance screen will be displayed here.

Repair Order Details 🔍 📄 ⌚ 🗑️ 🔄

Repair Order ID: 10018080 Not Submitted

! You have not yet submitted this repair order, please add any required items and then submit it to the Fleet Company. To add items, click on the blue buttons below.

Vehicle Details **RO Details** FMC Details Shop Details Client Details AME Details Defect History

| | | | | |
|----------------------|-----------------------|-------------------|---------------------|---------------------|
| Driver Phone Number | Alternate Driver Name | Driver Is Waiting | Created Date Time | Submitted Date Time |
| Estimated Completion | Actual Completion | Created By | 01/17/2020 03:44 AM | Not Submitted |
| | | Test User | | |

PM Add Items Add Tires
Select Quick Repair

| Line Item | Hrs | \$/Hr | Unit Cost | Qty | Total Cost |
|---|------|---------|-----------|-----|------------|
| LABOR : Conventional Lube, Oil, and Filter | | | | | |
| Edit Remove Service Code: Preventative Maintenance > Conventional Lube Oil Filter Correction: Replace Cause: Preventative Maintenance Authorization Status: Awaiting Approval | 0.50 | \$60.00 | \$30.00 | 1 | \$30.00 |
| PART : Conventional Lube, Oil, and Filter | | | | | |
| Edit Remove Service Code: Preventative Maintenance > Conventional Lube Oil Filter Part Name: Conventional Lube, Oil, and Filter Part Code: Manufacturer: Cause: Preventative Maintenance Authorization Status: Awaiting Approval | | | \$15.00 | 1 | \$15.00 |
| LABOR : Tire Inspection | | | | | |
| Edit Remove Service Code: Preventative Maintenance > Tire Inspection Correction: Diagnose/Test Cause: Preventative Maintenance Authorization Status: Awaiting Approval | 1.00 | \$15.00 | \$15.00 | 1 | \$15.00 |

There are several ways to add service items to the repair order.

Some buttons may be unavailable to you depending on the vehicle, Fleet Management Company, and if you are billing through a National account.

PM Add Items Add Tires
Select Quick Repair
Select Repair Package

The PM Button displays the "Preventative maintenance" screen

Preventative Maintenance

Maintenance Program: Test

Our records indicate the following preventative maintenance items are scheduled to be performed.

| Services Due | Pricing | Labor Time | Labor Rate | Cost | Unit Price | Qty | Parts Total | Fixed Cost |
|---------------|------------------------|------------|------------|------|------------|-----|-------------|------------|
| Tire Rotation | Menu Item (Labor Only) | | | | | | | |

Add Items Close

The Add Items button displays the service code search and selection screen.

Search for Service Code

Search
(example: brake fluid)

Search Reset

If you wanted to add an "Intake Manifold" repair item, enter "Intake" in to the search box and click Search.

| Search Results | |
|--|---|
| Intake Manifold | Engine, Cooling and Exhaust > Engine > Intake Manifold |
| Intake Air Duct | Powertrain Management > Fuel Delivery and Air Induction > Intake Air Duct |
| Intake Air Plenum | Powertrain Management > Fuel Delivery and Air Induction > Intake Air Plenum |
| Intake Air Heater | Powertrain Management > Fuel Delivery and Air Induction > Intake Air Heater |
| Valve, Intake/Exhaust | Engine, Cooling and Exhaust > Engine > Cylinder Head Assembly > Valve, Intake/Exhaust |
| + Browse All Service Codes | |
| Cancel | |

Select the correct item from the search results displayed.



If you do not find what you are searching for first time, try other words within the description. For example, if you are searching for the intake manifold gasket try just searching for gasket.

- Browse All Service Codes

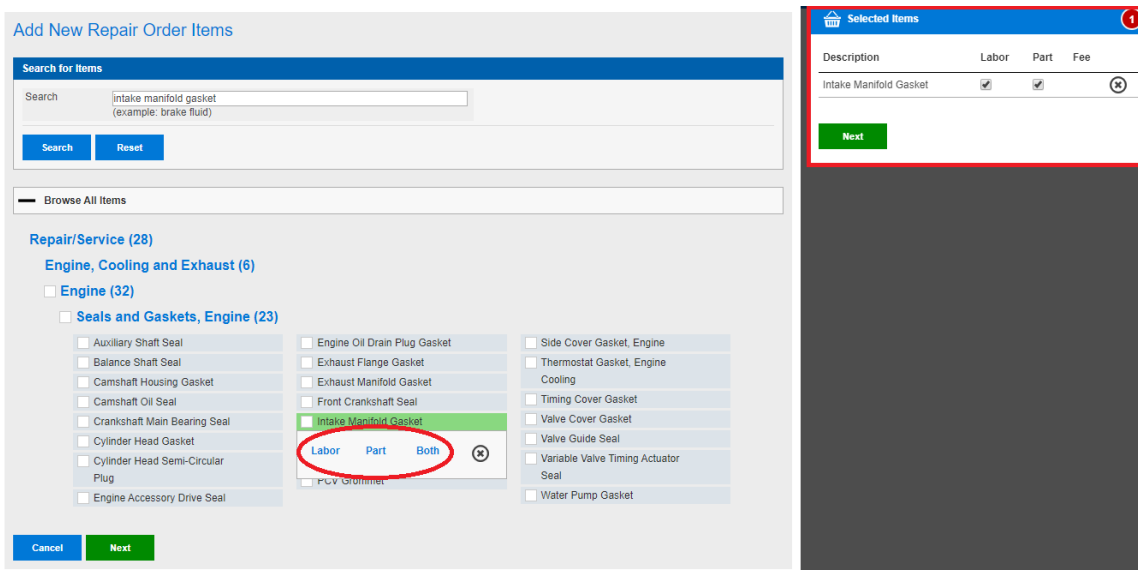
Service/Repair (28)

| | | |
|--|--|---|
| <input type="checkbox"/> Accessories, Options, & AMEs (72) | <input type="checkbox"/> Heating and Air Conditioning (101) | <input type="checkbox"/> Relays and Modules (18) |
| <input type="checkbox"/> Belts | <input type="checkbox"/> Hybrid Drive Systems (6) | <input type="checkbox"/> Restraint Systems (11) |
| <input type="checkbox"/> Body and Frame (53) | <input type="checkbox"/> Instrument Panel, Gauges and Warning Indicators (137) | <input type="checkbox"/> Sensors and Switches (21) |
| <input type="checkbox"/> Brakes and Traction Control (30) | <input type="checkbox"/> Lighting and Horns (50) | <input type="checkbox"/> Starting and Charging (7) |
| <input type="checkbox"/> Courtesy Check | <input type="checkbox"/> Lube Chassis Service | <input type="checkbox"/> Steering and Suspension (7) |
| <input type="checkbox"/> Cruise Control (23) | <input type="checkbox"/> Maintenance (23) | <input type="checkbox"/> Tire Replacement |
| <input type="checkbox"/> Diagnostics (11) | <input type="checkbox"/> Miscellaneous (24) | <input type="checkbox"/> Transmission and Drivetrain (29) |
| <input type="checkbox"/> Engine, Cooling and Exhaust (6) | <input type="checkbox"/> Powertrain Management (11) | <input type="checkbox"/> Windows and Glass (7) |
| <input type="checkbox"/> Equipment (14) | <input type="checkbox"/> Preventative Maintenance (50) | <input type="checkbox"/> Wiper & Washer Systems (54) |
| <input type="checkbox"/> Fees (41) | | |

Cancel

If you cannot find what you're looking for using the search box, you can click Browse All Service Codes to display a hierarchy of all codes within the system. Click on one of them to drill into a more granular level.

After finding the service code you want to add, you can select 'Labor', 'Part', 'Both' or 'Fee' (for applicable Service codes) depending on how you charge for the relevant work. Each service codes you have selected will appear in the 'Selected Items' panel.



Once you have selected all the items you want to add to the 'Repair Order' – press 'Next'.

The 'Add New Repair Order Items' screen is where you add detail for the line items. A 'Cause' drop-down box and 'Notes' text box are provided to show observations and offer an explanation to the FMC for the work being carried out. Be sure to provide as much detail as possible to the FMC.

Once you have completed this page – press 'Confirm' to add the item(s) to the repair order. You can remove items by pressing the 'X' to the right-hand side of the line item.

Add New Repair Order Items

Engine, Cooling and Exhaust

| Line Item | | Time (Hrs) | Rate (\$/Hr) | Unit Cost | Qty | Total Cost | |
|------------------------|---|------------|--------------|-----------|-----|------------|--|
| INTAKE MANIFOLD | | | | | | | |
| Labor Correction | Replace | 1 | 60 | \$60.00 | 1 | \$60.00 | |
| Part Name | Intake Manifold | | | 10 | 1 | \$10.00 | |
| Part Code | EXAMPLECODE123 | | | | | | |
| Manufacturer Name | EXAMPLENAME123 | | | | | | |
| Cause | Wear and Tear | | | | | | |
| Notes | Intake Manifold has snapped - replacement work. | | | | | | |

Any measurements that are required will be entered on the next screen. The relevant line item requiring measurements will be labeled by the header. You can change the vehicle type by pressing the 'Change Vehicle Type' button in the top right of the screen.

Rotor Thickness

Please enter the thicknesses of all the positions of the vehicle that you are working on.

Units

mm

/1000"

Change Vehicle Type

Adding Repair Packages

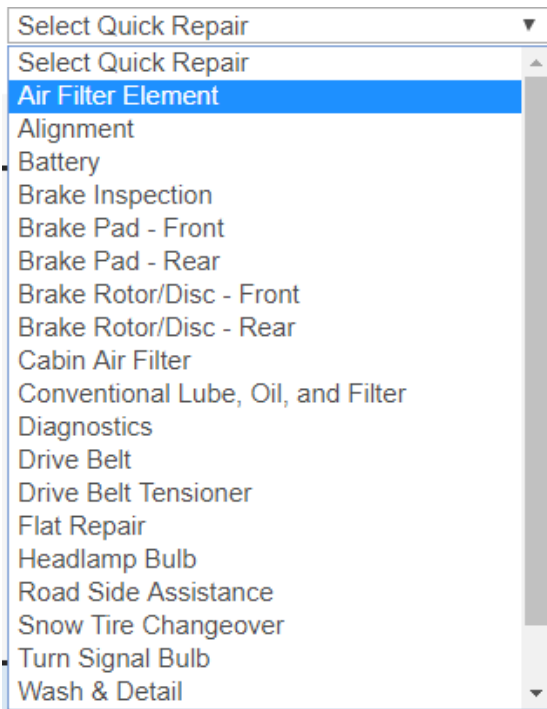
To add a Repair Package to a repair order, simply click the 'Select Repair Package' drop down menu and select the Repair Package you wish to add to the repair order.

Select Quick Repair

Select Repair Package

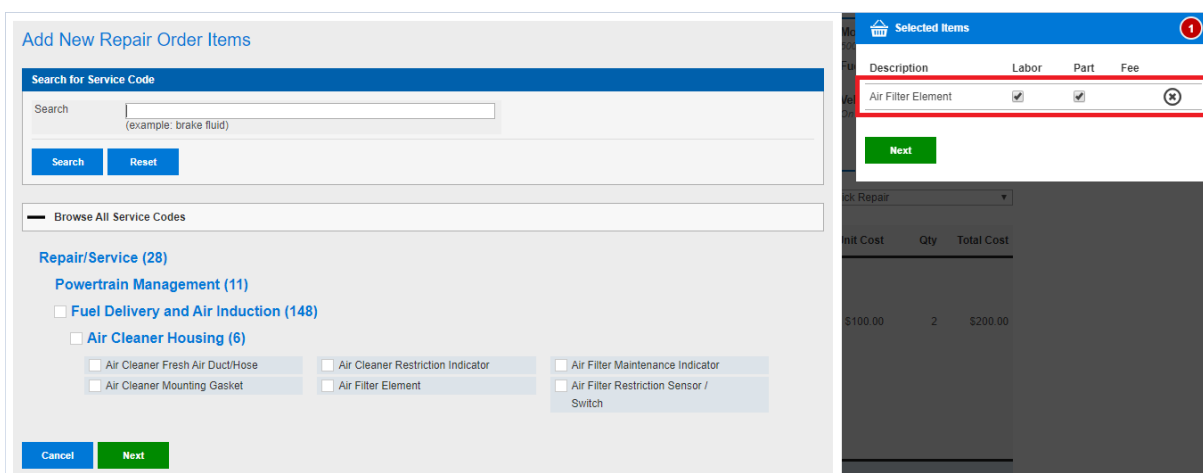
Once you have selected the package, it will be added to the 'Selected Items' panel. From here you are able to add or remove job types by unticking the labor, part or fee boxes. If you wish to add any other Service codes you can from this screen, otherwise please click 'Next' to continue the Repair Order.

Adding Quick Repair Items



To speed up the process of finding and adding some items, the "Quick Repair" list contains 21 of the most common items to add.

If you select one of these 'Quick Repair Items', it will be added to the 'Selected items' panel. You can then click 'Next' to continue and add this item or add anymore line items required as usual.



Adding Tires

Using the Add Tires button, you can add tires that you are replacing, tire related services and enter the depths of the existing tires on the vehicle.



Tire Replacement

Check the the box on each tire you are going to replace. If you are not replacing any tires but need to add other tire services, just click the 'Next' button.

Please enter the tread depths of all the tires that you are working on.

Units

mm

/32"

Outer Depth /32"

Middle Depth /32"

Inner Depth /32"

Outer Depth /32"

Middle Depth /32"

Inner Depth /32"

Change Vehicle Type

Outer Depth /32"

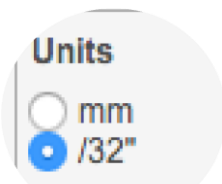
Middle Depth /32"

Inner Depth /32"

Outer Depth /32"

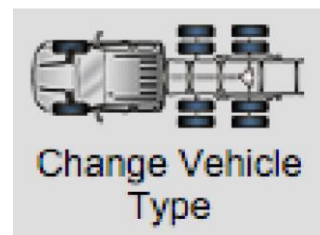
Middle Depth /32"

Inner Depth /32"



You can choose between imperial and metric to record your measurements.

If the vehicle is medium to heavy duty, then you may select the twin axel configuration.



Once you have selected the tire positions and entered the readings you can now select the tire manufacturer, model and size.

Tire Search

Tire Search

Manufacturer Model Size

[Can't Find The Tire?](#)

| | Manufacturer | Model | Size |
|----------------------------------|----------------------|------------|---------------|
| SELECT THIS TIRE | Tire Manufacturer 1 | Model 12AB | LT222/22R11 |
| SELECT THIS TIRE | Tire Manufacturer 2 | Model 12AB | LT222/22R11 |
| SELECT THIS TIRE | Tire Manufacturer 3 | Model 12AB | LT265/70R17 |
| SELECT THIS TIRE | Tire Manufacturer 4 | Model 12AB | LT245/75R16 |
| SELECT THIS TIRE | Tire Manufacturer 5 | Model 12AB | P215/65R15 |
| SELECT THIS TIRE | Tire Manufacturer 6 | Model 12AB | P235/75R15 |
| SELECT THIS TIRE | Tire Manufacturer 7 | Model 12AB | P232/23R14 |
| SELECT THIS TIRE | Tire Manufacturer 8 | Model 12AB | P123/12ZR14 |
| SELECT THIS TIRE | Tire Manufacturer 9 | Model 12AB | LT222/22R11 |
| SELECT THIS TIRE | Tire Manufacturer 10 | Model 12AB | LT225/70r19.5 |

1 2 3 4 5 6 7 8 9 10 >

Once selected add the cause for replacement, tire code (if available), Tire unit price and any labor for fitting.

Tire Details

| | |
|---|--|
| Tire Position | Cause |
| <input type="text" value="Front, Right"/> | <input type="text" value="End Of Life"/> |
| Tire Description | LIGHT TRUCK TIRE |
| Manufacturer | Tire Manufacturer 1 |
| Model | Model 12AB |
| Size | LT245/75R15 |
| Tire Code | <input type="text"/> |
| Tire Price (\$) | <input type="text"/> |

Next use this screen to add any tire related items to the Repair Order.

Additional Extras

Labor

| Labor | Cost (\$) | Quantity |
|---------------------------|----------------------|----------|
| Alignment | <input type="text"/> | 0 ▼ |
| Flat Repair | <input type="text"/> | 0 ▼ |
| Tire Replacement | <input type="text"/> | 0 ▼ |
| Tire Rotation (per wheel) | <input type="text"/> | 0 ▼ |
| Tire Studding | <input type="text"/> | 0 ▼ |
| TPMS Service Valve Kit | <input type="text"/> | 0 ▼ |
| Valve Replacement | <input type="text"/> | 0 ▼ |
| Wheel Balancing | <input type="text"/> | 0 ▼ |

Fees

| Fee | Cost (\$) | Quantity |
|------------------------------------|----------------------|----------|
| Road Hazard Warranty | <input type="text"/> | 0 ▼ |
| State / Province Tire Disposal Fee | <input type="text"/> | 0 ▼ |
| Tire Disposal Fee | <input type="text"/> | 0 ▼ |

Parts

| Service Code | Part Name | Cost (\$) | Quantity |
|------------------------|--|----------------------|----------|
| Flat Repair | <input type="text" value="Flat Repair Patch"/> | <input type="text"/> | 0 ▼ |
| Tire Studding | <input type="text" value="Tire Studs"/> | <input type="text"/> | 0 ▼ |
| TPMS Service Valve Kit | <input type="text" value="Service Valve Kit"/> | <input type="text"/> | 0 ▼ |
| Valve Replacement | <input type="text" value="Valve Stem"/> | <input type="text"/> | 0 ▼ |
| Wheel Balancing | <input type="text" value="Balance Weights"/> | <input type="text"/> | 0 ▼ |

Back
Cancel
Save

Once completed click the "Save" button to add the items to the repair order.

Adding items from Catalog (National account billing)

If you are billing through a **National account**, then the catalog button may be available. Clicking the catalog button and entering the applicable code(s).

Add Items From Catalog

Find Catalog Items

Labor Code

Part Code

Finish
Cancel

Selecting the item(s) that ARE applicable and clicking finish.

Add Items From Catalog

Find Catalog Items

Labor Code



Part Code

| Type | Catalog Code | Service Code | Name | Unit Cost | Qty | Cause | |
|-------|--------------|--------------|------------------------------|-----------|-----|---------------|---|
| Labor | | Spark Plug | SPARK PLUG REPLACEMENT LABOR | 0.00 | 1 | Wear and Tear | REMOVE |

Finish
Cancel

Quick-reference icons

There are a series of icons in the line item provided to give you further information.

| | <i>KEY</i> |
|-------------|---|
| History |  |
| Tire Depths |  |
| Info |  |
| Audit |  |
| Notes |  |
| Add Another |  |

Labor

Line items display the type of Job, Service Code, Operation, Reason and the Authorization Status.

Cost information is displayed on the right-hand side of the screen, split into Hours, Charge per Hour, Unit Cost, Qty and Total Cost.

Further information can be found about the line item by clicking on the icons provided, and a new window will appear with this detail.

Tires

Line items display the type of Job, Service Code, Grouping Manufacturer, Model, Size, Tire Code, Reason and the Authorization Status.

Cost information is displayed on the right-hand side of the screen, split into Unit Cost, Qty and Total Cost.

Further information can be found about the line item by clicking on the icons provided, and a new window will appear with this detail.

All items that are connected are grouped together, to clearly show the different forms of maintenance being done to that vehicle.

Once submitted to the Fleet Management Company you will see one of the following messages.

Auto Approved will instantly display if the repair order meets the required criteria the system will issue instant approval.

Repair Order ID: 6758327
Authorization Number: 6758327A9523
Auto-Approved

- This repair order has been approved, you may start work on the vehicle.
- Once work is complete, click the [Work Complete](#) button at the bottom of the page for payment

When the repair order requires Fleet Management Company approval the "Awaiting Approval" message is displayed. The Fleet Management Company will process the repair order and the status will change.

Repair Order ID: 6758335
Awaiting Fleet Approval

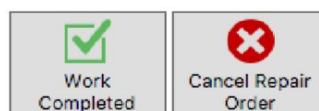
- This repair order has been submitted to the Fleet Company for approval, you cannot make any changes to it.
- Please wait for approval before beginning work on the vehicle.
- Approval should take no more than a few minutes, although this may take longer on large repair orders or if customer approval is required.

Once the Fleet Management Company has approved the repair order the status will change to "Approved". You can now commence work on this vehicle.

Repair Order ID: 6758335
Authorization Number: 6758335A7233
Approved

- This repair order has been approved, you may start work on the vehicle.
- Once work is complete, click the [Work Complete](#) button at the bottom of the page for payment

Once the work has been completed on the vehicle click the "Work Complete button" (at the bottom of the repair order details page) to claim payment.



Item Rejection

If the item is rejected the following will show.

The item can be removed from the Repair order by clicking the delete button or edited by clicking the edit button.

If the item requires no changes than clicking the resubmit button will set the item ready for resubmission.

| | | | | | | | |
|-----------------|--------------------------------|-----------------------------------|--------|---|--------|--|--|
| Resubmit | FEE : Tire Disposal Fee | | | | | | |
| Edit | Service Code | Fees > Tire Charge > Disposal Fee | \$8.00 | 1 | \$8.00 | | |
| Remove | Fee Name | Tire Disposal Fee | | | | | |
| | Cause | State Required | | | | | |
| | Authorization Status | Rejected | | | | | |
| | Rejection Reason | Price | | | | | |

Clicking the edit button allows the price and quantity to be changed, the item can then be set ready for resubmission by clicking the resubmit button.

If an item(s) has been rejected for the Reason 'More information required' then the following button will appear.

| | | | | | | | |
|---------------|-------------------------------|---------------------------|---------|---|---------|--|--|
| Edit | FEE : Battery Disposal | | | | | | |
| Remove | Service Code | Fees > Battery Disposal | \$11.00 | 1 | \$11.00 | | |
| | Fee Name | Battery Disposal | | | | | |
| | Cause | Spare Swap | | | | | |
| | Authorization Status | Rejected | | | | | |
| | Rejection Reason | More Information Required | | | | | |

Add More Information

Clicking Add more information will display a notes popup and entering a note will set all the items so they are ready for resubmission.

Resubmitting a Repair Order

| | | | | | | |
|-----------------|------------------------------|---|-------|---|---------|--|
| Resubmit | PART : Body and Frame | | | | | |
| Cancel | Service Code | Body and Frame | 11.00 | 1 | \$11.00 | |
| | Part Name | <input type="text" value="Body and Frame"/> | | | | |
| | Part Code | <input type="text"/> | | | | |
| | Manufacturer | <input type="text"/> | | | | |
| | Cause | Driver Request | | | | |
| | Authorization Status | Rejected | | | | |
| | Rejection Reason | Price | | | | |

Once completed you need to gain authorization for the repair from the Fleet Management Company, by clicking "Submit for Authorization".

| PART : Intake Manifold | | | | | |
|------------------------|--|----------|---|----------|--|
| Edit | | | | | |
| Delete | | | | | |
| Service Code | Engine, Cooling and Exhaust > Engine > Intake Manifold | \$101.00 | 1 | \$101.00 | |
| Parent Name | Manifold | | | | |
| Part Name | Upper | | | | |
| Part Code | | | | | |
| Manufacturer | | | | | |
| Cause | Wear and Tear | | | | |
| Authorization Status | Resubmitted | | | | |
| Rejection Reason | Price | | | | |

| FEE : Tire Disposal Fee | | | | | |
|-------------------------|-----------------------------------|---------|---|---------|--|
| Edit | | | | | |
| Delete | | | | | |
| Service Code | Fees > Tire Charge > Disposal Fee | \$10.00 | 1 | \$10.00 | |
| Fee Name | Tire Disposal Fee | | | | |
| Cause | State Required | | | | |
| Authorization Status | Awaiting Approval | | | | |

This contractor and subcontractor shall abide by the requirements of 41 CFR §§ 60-1.4(a), 60-300.5(a) and 60-741.5(a). These regulations prohibit discrimination against qualified individuals based on their status as protected veterans or individuals with disabilities, and prohibit discrimination against all individuals based on their race, color, religion, sex, or national origin. Moreover, these regulations require that covered prime contractors and subcontractors take affirmative action to employ and advance in employment individuals without regard to race, color, religion, sex, national origin, protected veteran status or disability.

| | |
|----------------------------------|-----------------|
| SubTotal (exc. Tax) | \$164.00 |
| Agreed Discount | (\$6.56) |
| AI Transaction Fee | (\$0.95) |
| Payable Amount (exc. Tax) | \$156.49 |

Return to ROM

Repair Order Completion

| Work Dates | | | |
|-----------------|---|---------------------|---|
| Work Start Date | <input type="text" value="6/6/2019"/> | Work Completed Date | <input type="text" value="6/6/2019"/> |
| Work Start Time | <input type="text" value="10"/> <input type="text" value="45"/> <input type="text" value="AM"/> | Work Completed Time | <input type="text" value="06"/> <input type="text" value="30"/> <input type="text" value="PM"/> |

| Tax & Shop Invoice Number | | | |
|---------------------------|-----------------------------------|----------------|----------------------|
| Total Before Tax | \$21.00 | Invoice Number | <input type="text"/> |
| Tax | <input type="text" value="1.00"/> | | |
| Total After Tax | \$22.00 | | |

By clicking save, you are agreeing that the work outlined in this repair order has been completed in its entirety. You will also be paid for the exact amount of this approved repair order less any agreed upon fees. No further changes can be made to this repair order. Are you sure you want to continue?

The Validate and Submit screen requires you to enter your estimated completion times, this must be a date in the future. In the tax field you are required to enter the amount of tax you are adding to the repair order. Click the "Submit for Authorization" button to submit the repair order.

To complete the repair order and claim payment you need to confirm time of completion, tax and enter a reference (Invoice) number.

Repair Order Completion

Work Dates

| | | | |
|-----------------|--|---------------------|--|
| Work Start Date | <input type="text" value="9/25/2015"/> | Work Completed Date | <input type="text" value="9/25/2015"/> |
| Work Start Time | <input type="text" value="07"/> <input type="text" value="45"/> AM | Work Completed Time | <input type="text" value="07"/> <input type="text" value="45"/> AM |

Tax & Shop Invoice Number

| | | | |
|------------------|------------------------------------|----------------|----------------------|
| Total Before Tax | \$164.00 | Shop Reference | <input type="text"/> |
| Tax | <input type="text" value="16.00"/> | | |

By clicking 'Save', you are marking this Repair Order as 'Complete' and the work will be invoiced. No further changes can then be made. Are you sure you want to continue?








Save
Cancel

If you elected for credit card payment, and are performing work on an EMKAY vehicle, the status of the repair order changes to "Awaiting Payment", this allows you to claim the credit card payment.

Repair order details

As the repair order processes these icons become visible.



- 
Repair Order Information - Shop Contact, Driver waiting etc.
- 
Credit Card Payment (EMKAY specific)
- 
Repair Order audit – displays the full history of the Repair Order
- 
Print Repair Order
- 
Downtime manager - the ability to add notes if work exceeds the original estimated time or if parts are on order or you have experienced a delay.
- 
Vehicle maintenance history
- 
Repair Order notes - this area contains the line item and repair order notes to and from the Fleet Management Company

Status Icon Guide



Approved



Awaiting Fleet



Requires attention



Auto-approved



Completed/Paid



Awaiting payment



Cancelled



Downtime