**AUTOMEND Software Documentation**

**Key Points from Brief:**

1. **User Types and Roles:**
   * **Superadmin**: Full control over the system, assigning tasks, and managing insurance company associations.
   * **CSR (Customer Service Representative)**: Handles receiving and dispatching cars, opening job cards, and finalizing jobs.
   * **Surveyor**: Manages insurance claims, creates quotations, and reviews repairs.
   * **Technician**: Responsible for repairing vehicles and marking jobs as complete.
2. **Surveyor Assignment:**
   * Superadmin can assign surveyors to specific insurance companies or opt for random assignment.
   * Tasks are distributed based on workload among users of the same role.
3. **Automation Features:**
   * Automatic email communication with insurance companies for claim approvals and quotations.
   * Documents are automatically sent to insurance companies when required.
   * Status tracking for email openings.
4. **OCR Functionality:**
   * OCR is used to fill in customer and car details automatically, but it may not always be 100% accurate, requiring manual verification.
5. **Job Card:**
   * The central module containing all relevant details for a repair job, including customer information, car details, insurance details, claims, quotations, and documents.

**AUTOMEND User Guide**

**Overview:**

AUTOMEND is a SaaS software solution designed for garages and repair shops in the UAE, specifically tailored for managing the workflow associated with insurance claims and vehicle repairs. The software supports multiple user roles, automated document handling, and task management to streamline the repair process.

**User Roles:**

**1. Superadmin:**

* Full control over the system, including user management, task reassignment, and oversight of insurance company interactions.
* Can enable/disable insurance companies, update their details, and assign specific surveyors to handle claims from particular companies.

**2. CSR (Customer Service Representative):**

* Handles initial and final customer interactions, including receiving cars, opening job cards, and dispatching cars after repairs are complete.
* Automatically sends job cards to insurance companies for claim approval unless an existing claim number is provided.

**3. Surveyor:**

* Manages claims, creates quotations, and reviews the final repairs.
* Can be assigned specific insurance companies to handle or receive tasks randomly based on workload distribution.
* Reviews and approves claims, creates quotations, and manages the final inspection of repaired vehicles.

**4. Technician:**

* Responsible for performing repairs on vehicles.
* Marks jobs as complete after repairs are done.

**Workflow Overview:**

**1. Car Reception:**

* The CSR or Surveyor receives the car and opens a job card.
* If a claim number already exists, the CSR can bypass sending the claim to the insurance company.
* The system sends required documents to the insurance company for claim approval.

**2. Claim Approval:**

* The Surveyor manages the approval process, updating the system with the insurance claim number once approved.

**3. Quotation Creation:**

* The Surveyor creates a quotation for the repairs, which is automatically sent to the insurance company unless the "Do Not Send" option is selected.
* The system tracks whether the email containing the quotation has been opened.

**4. Repair Process:**

* The Technician completes the repairs and marks the job as done.
* The job is returned to the Surveyor for final inspection and after-job photos.

**5. Car Dispatch:**

* The CSR finalizes the job by handing the car back to the customer and marking the job as complete.

**Job Card Details:**

**1. Job Card Information:**

* Includes job card notes, start date, status, assigned user, and department.

**2. Customer Details:**

* Contains the customer's personal information and driving license details.
* **Note:** OCR functionality is used to fill in these details, but manual verification may be required.

**3. Car and Insurance Details:**

* Includes car information and insurance details.
* **Note:** OCR functionality is used to fill in these details, but manual verification may be required.

**4. Claim Section:**

* Displays the internal and insurance claim numbers and the status of the claim.

**5. Quotation Section:**

* Lists all quotations associated with the job, with options for additional quotations if required.

**6. Documents Section:**

* Contains all relevant documents, including Emirates ID, Driving License, Registration Card, Police Report, and photos of the car before and after repairs.

**7. Comments Section:**

* Allows for internal comments between users with timestamps and usernames.

**8. History Section:**

* Logs all actions taken on the job card with timestamps and user information.

**Step-by-Step Guide:**

**Step 1: Opening a Job Card**

* **Customer Details:** Upload Emirates ID and Driving License. Verify OCR-filled information for accuracy.
* **Car Details:** Upload the car's Registration Card. Verify OCR-filled information for accuracy.
* **Insurance Details:** Enter the current insurer and check the expiration date.

**Step 2: Claim Request Approval**

* **Surveyor:** Approves the claim and enters the insurance claim number.

**Step 3: Quotation Creation**

* **Surveyor:** Creates and sends the quotation to the insurance company. Manages additional quotations if required.

**Step 4: Repair Completion**

* **Technician:** Completes repairs and marks the job as done.

**Step 5: Final Inspection and Car Dispatch**

* **Surveyor:** Inspects the car post-repair, adds after-job photos, and transfers the job to CSR.
* **CSR:** Hands over the car to the customer and finalizes the job.