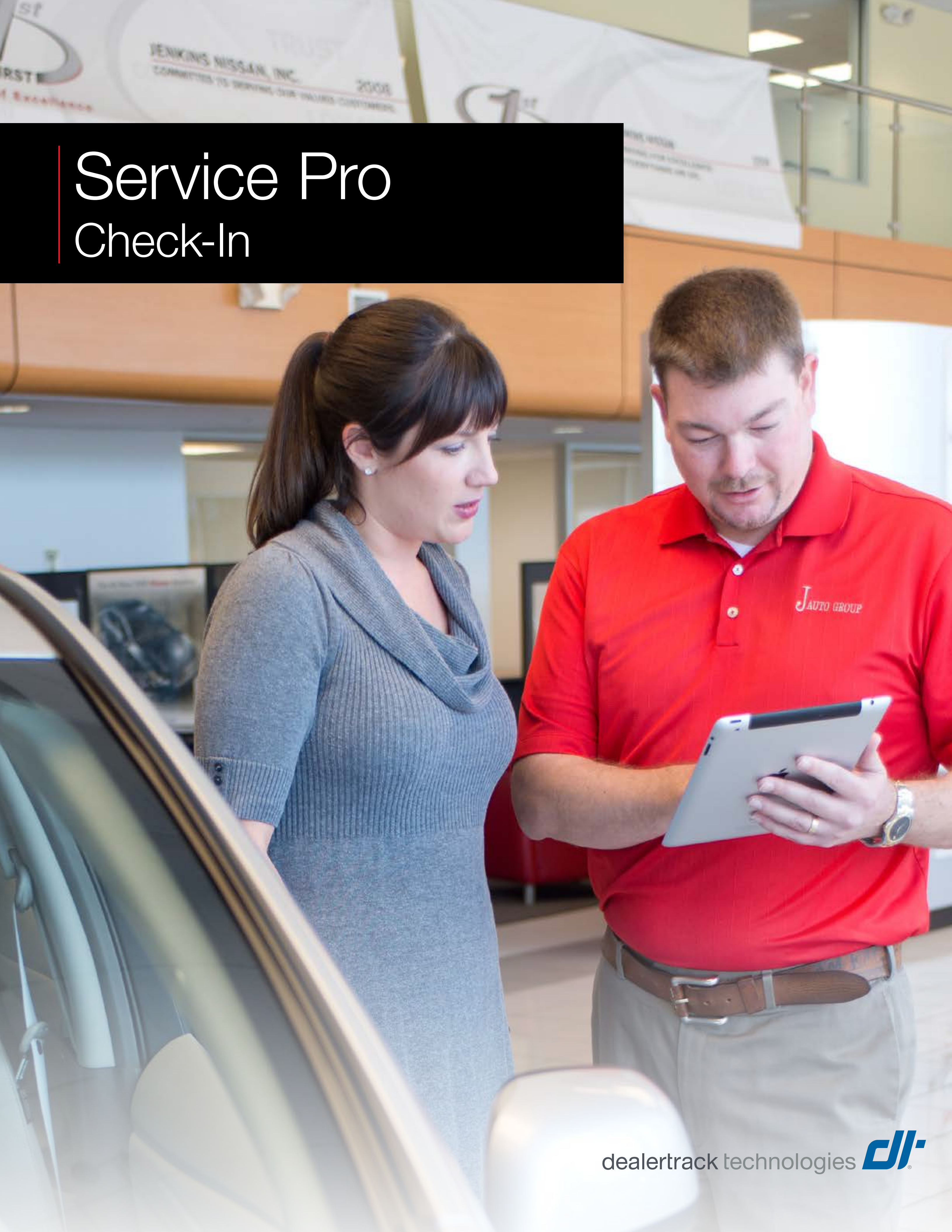
Service Pro
Check-In



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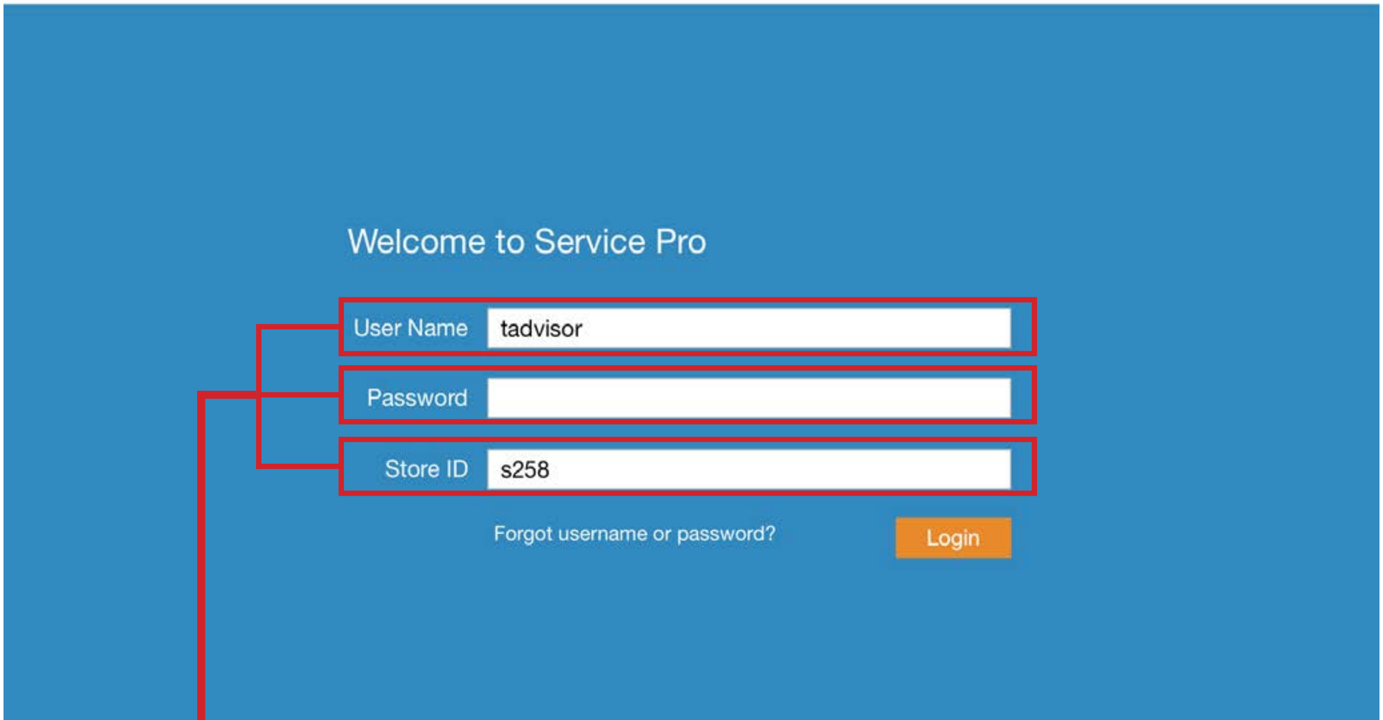
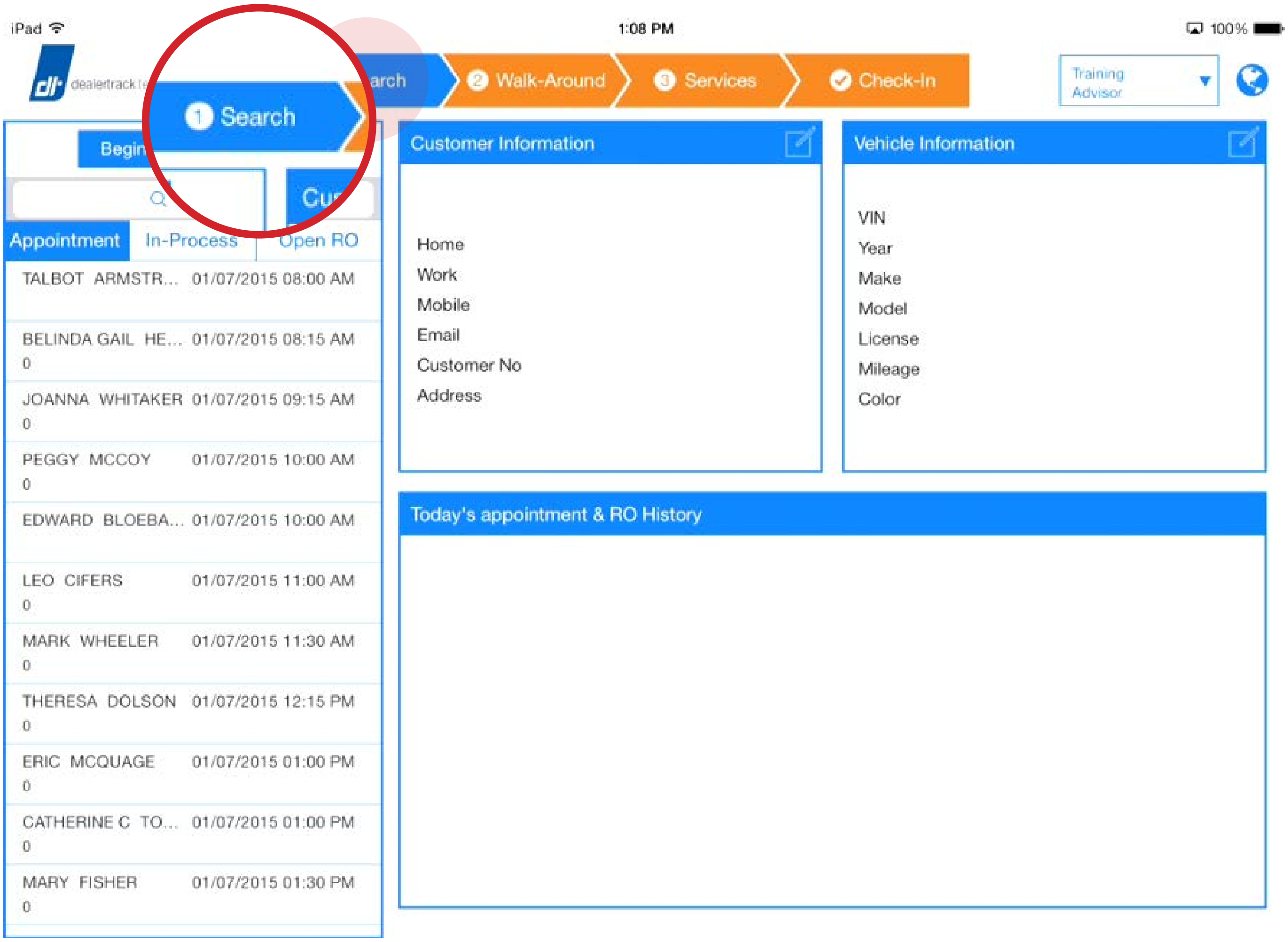


Username: First initial, followed by your last name (no spaces, case irrelevant)
Password: Employee Number
ID: SXXX (your unique store code assigned by Service Pro)

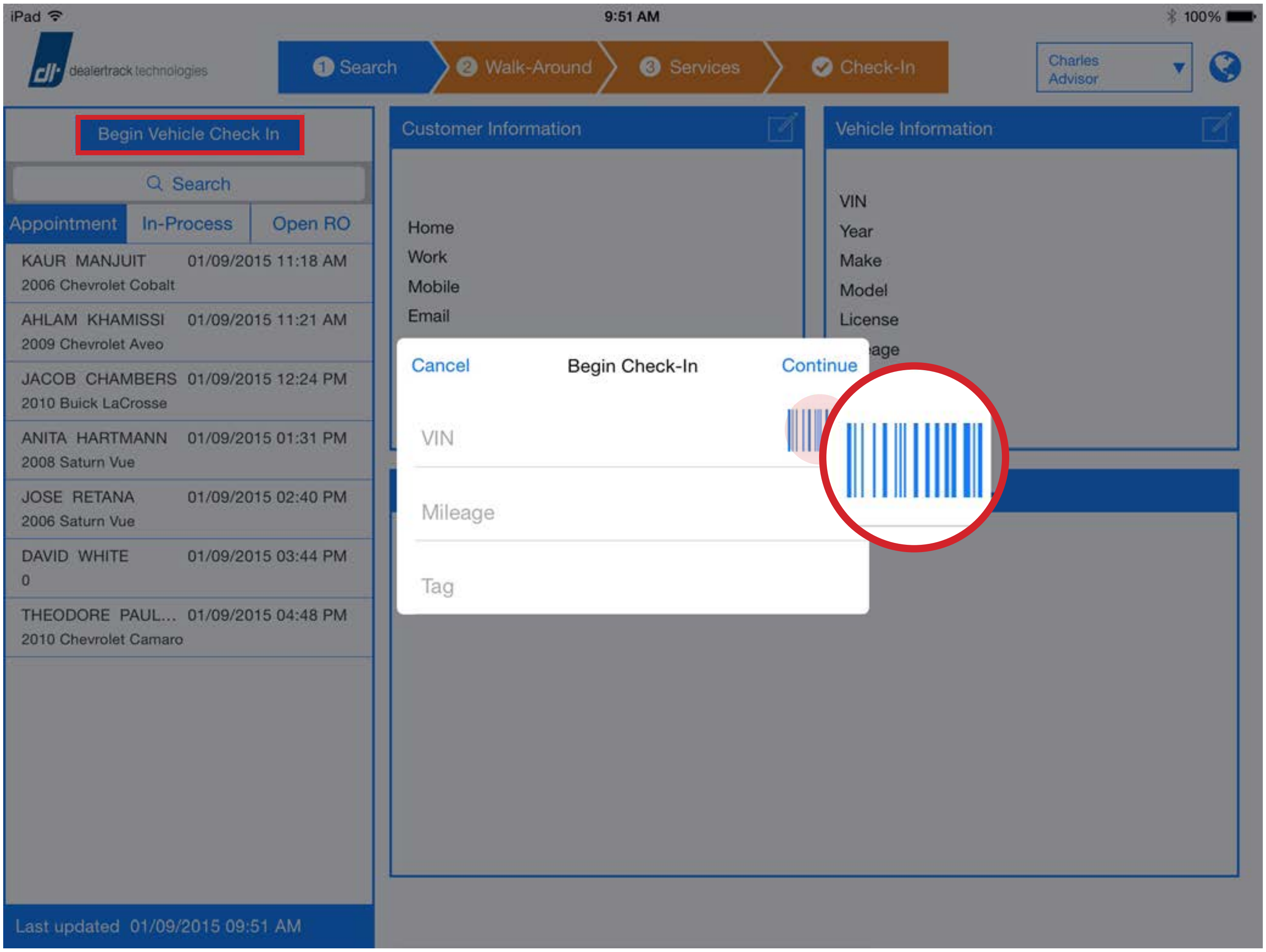
Notice the four different tabs at the top of the screen.

The *'Search'* tab is where the process begins.
You can start an RO in several different ways. The first is by starting from an appointment. Your appointment list from the DMS is in the left frame. To refresh this list, drag it down and release.

Tap the appointment you want to start an RO from, then tap *'Begin Vehicle Check in'*.



You can also start an RO by simply tapping *'Begin Vehicle Check-In'* then tapping the barcode symbol. This will allow you to scan a VIN barcode. Alternatively, you can type the number.

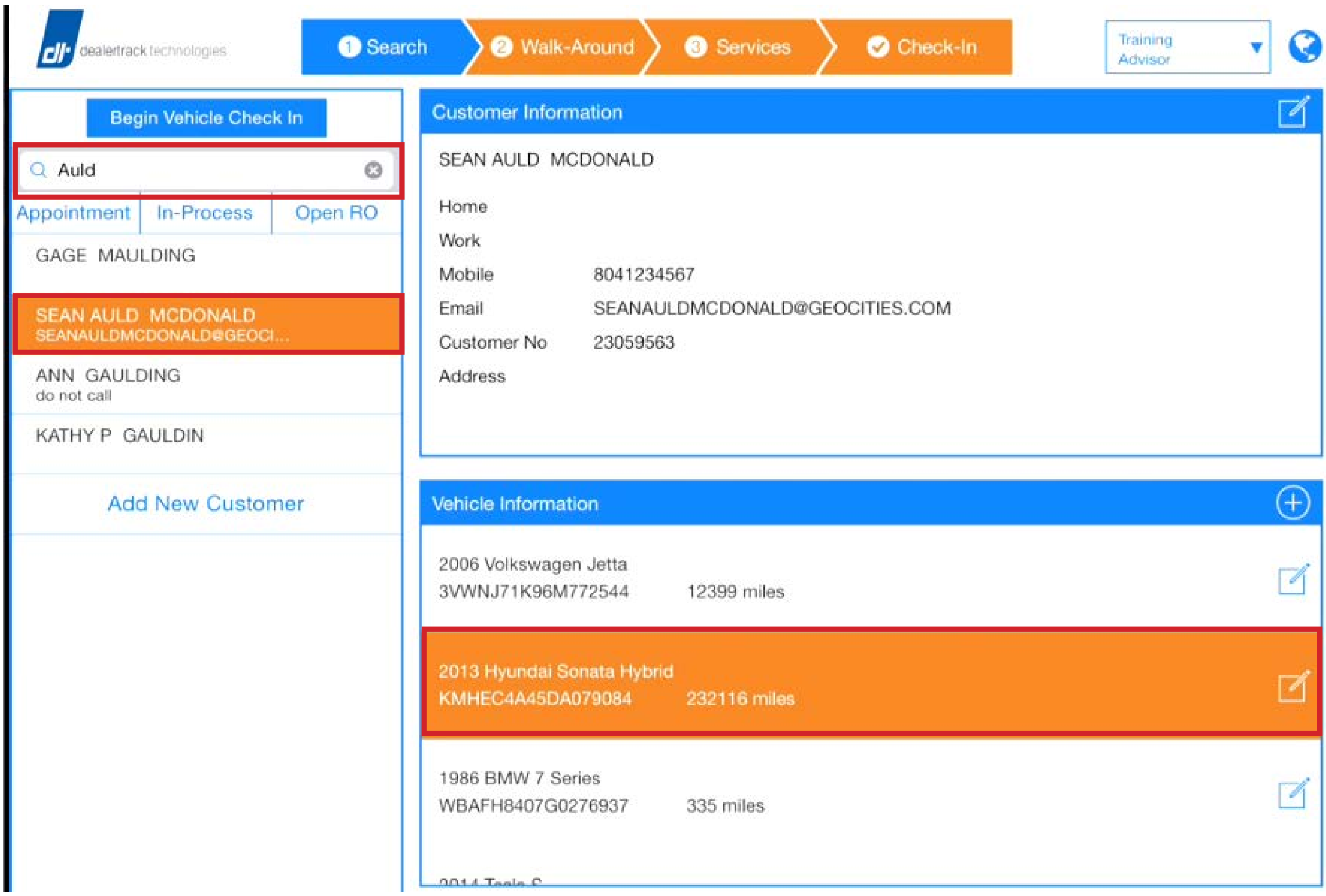


Line up the barcode within the white rectangle and the scanner will automatically detect the VIN and enter it into the appropriate field in the *'Begin Vehicle Check-In'* box.

You can also search for a customer.

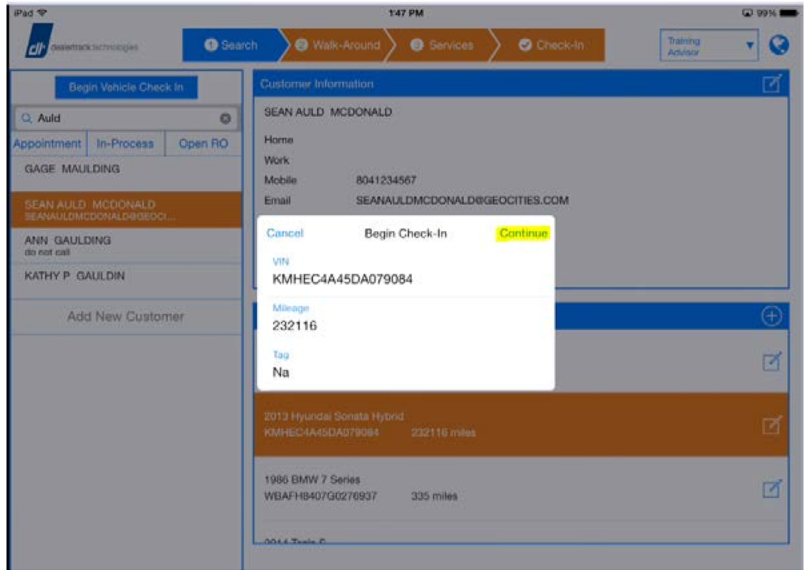
Type customer name, e-mail, phone number, or last 8 of the VIN into the *'Search'* text field.

Select the customer (left frame), select the vehicle (bottom right frame), then *'Begin vehicle check in'*.



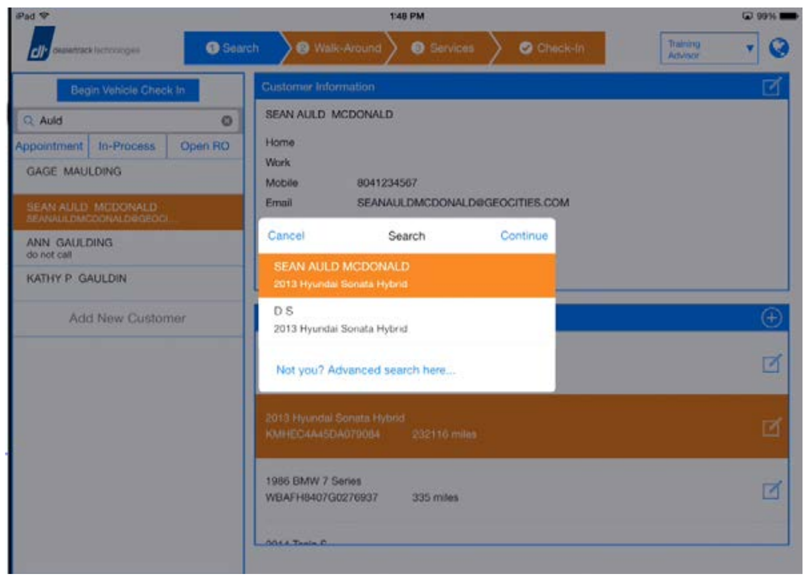
You need the full VIN, mileage with an increase of at least 1 from what is in the DMS, and the tag number (maximum of 5 digits).

Tap *Continue* once this is filled out.



If there is more than one customer attached to that VIN in the DMS, you will be asked to verify which customer you are checking in.

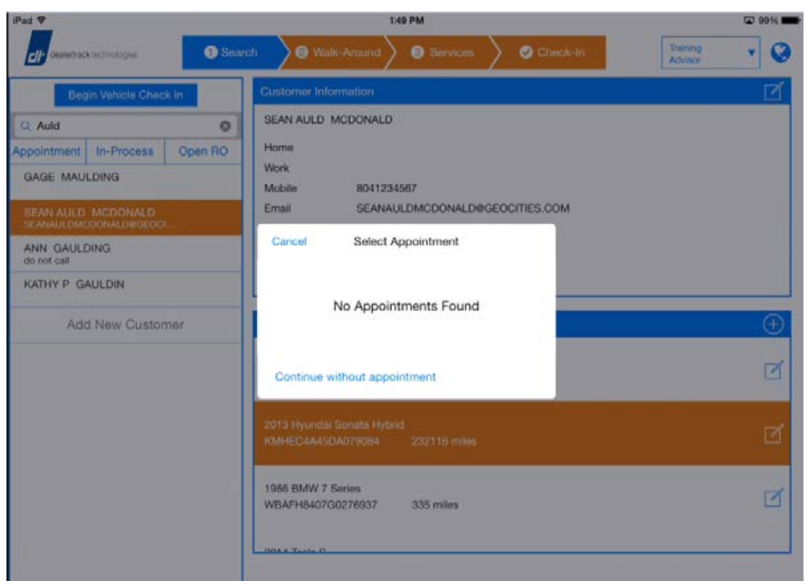
Tap the name, then continue.



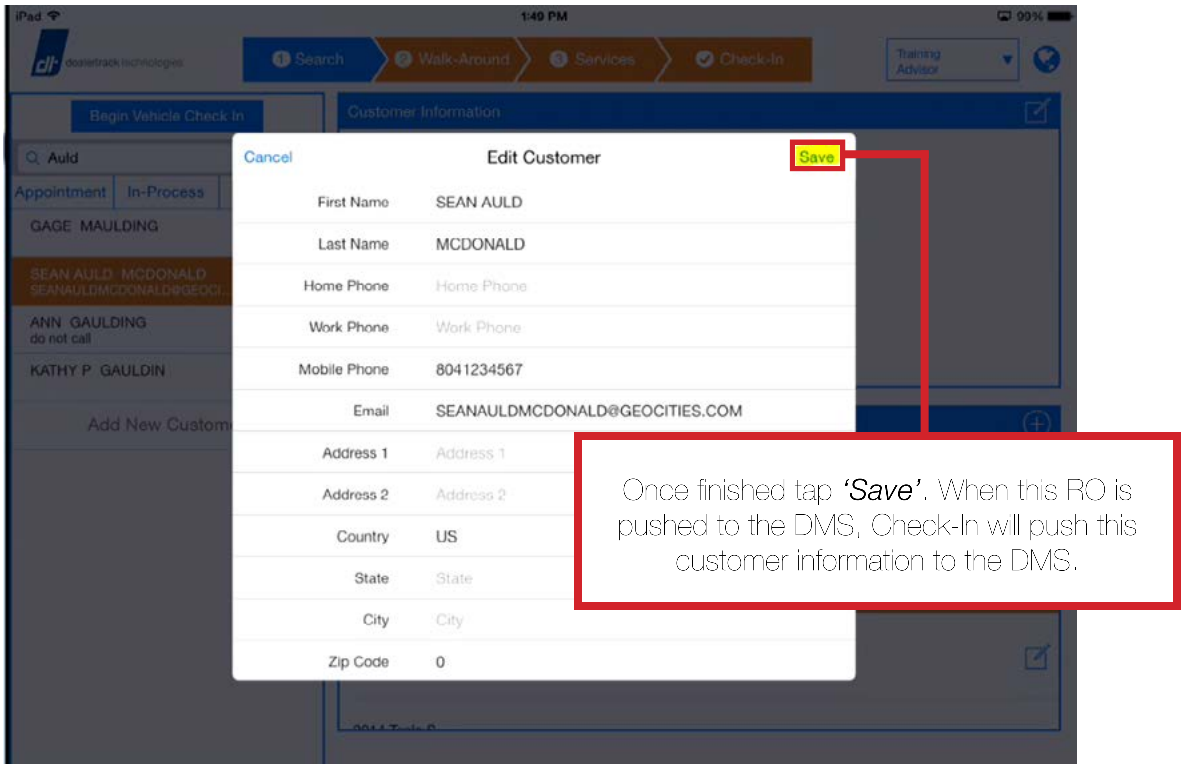
Check-In will now search for an appointment for this customer in the DMS.

If there is not, tap continue without. If there is, tap the appointment.

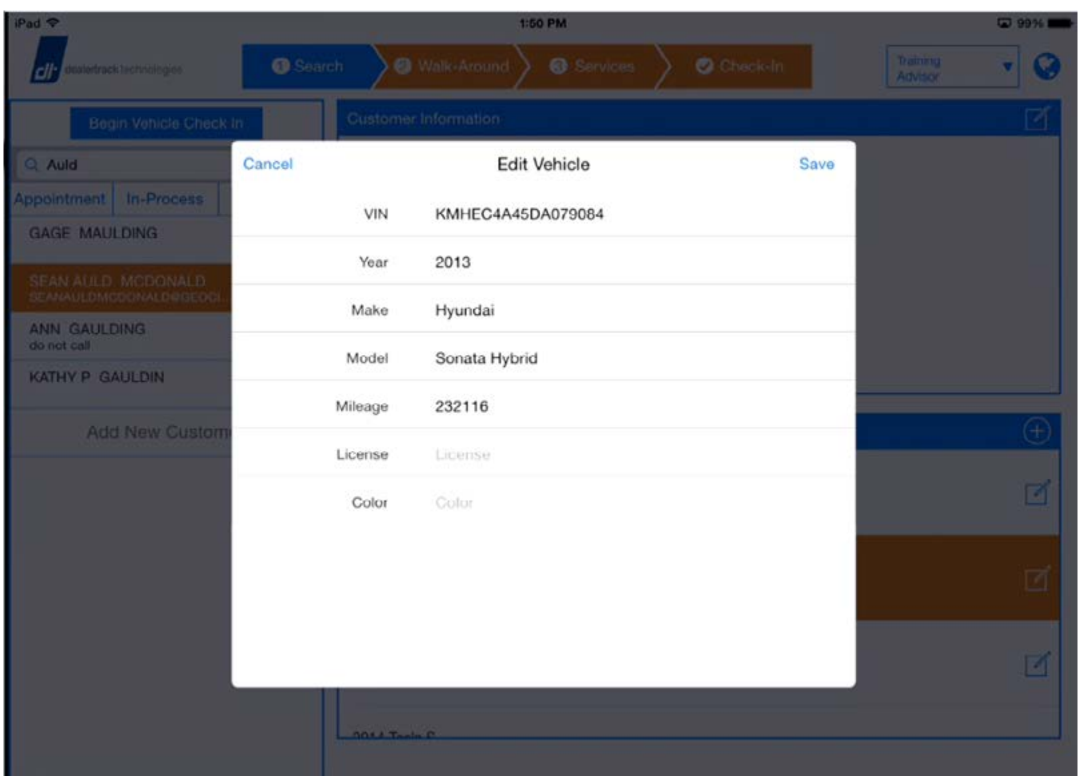
Now continue.



You now have the option of modifying customer information.

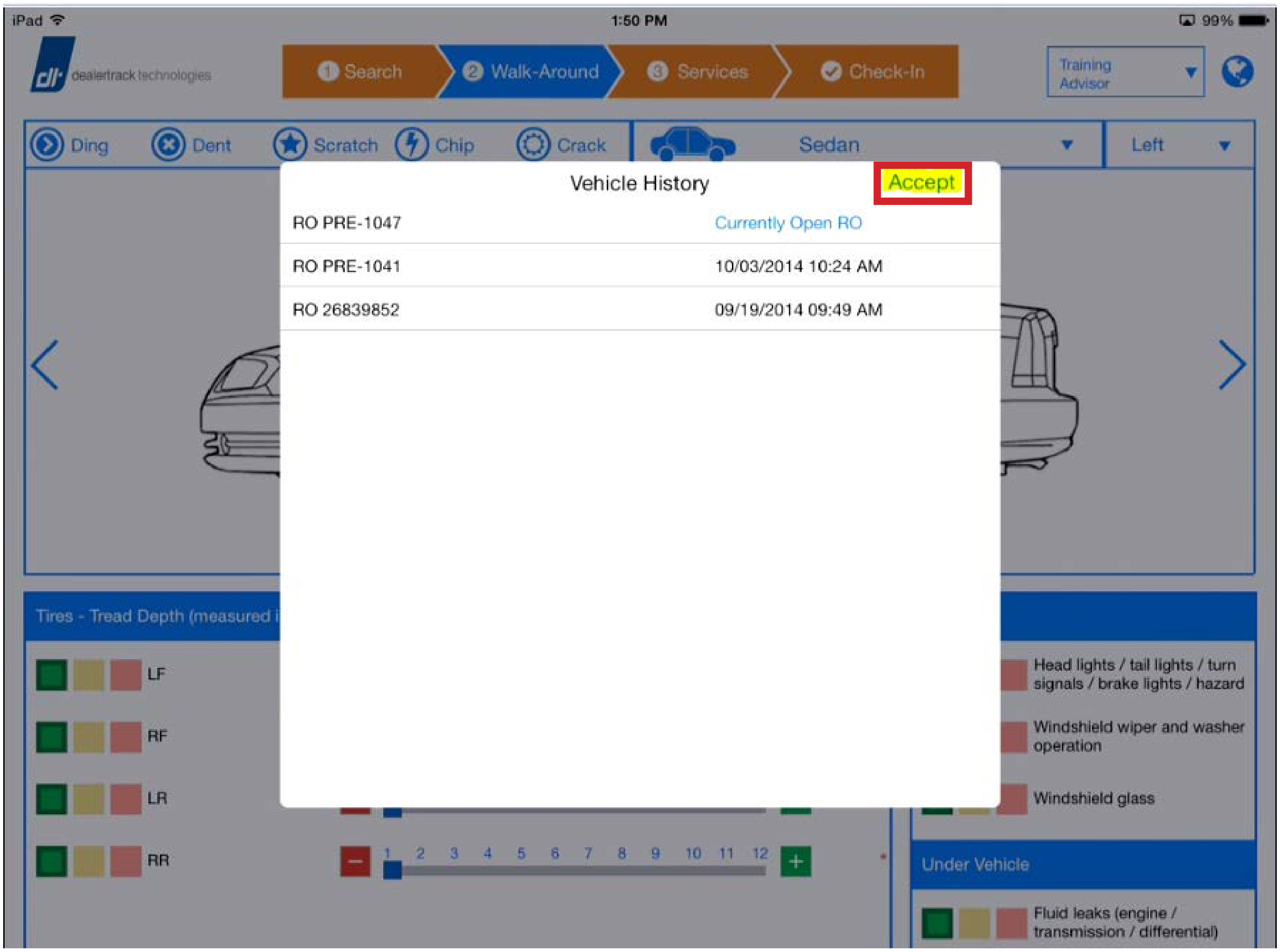


You are also able to edit vehicle information.



If the DMS has history for this customer/vehicle, it will be displayed here.

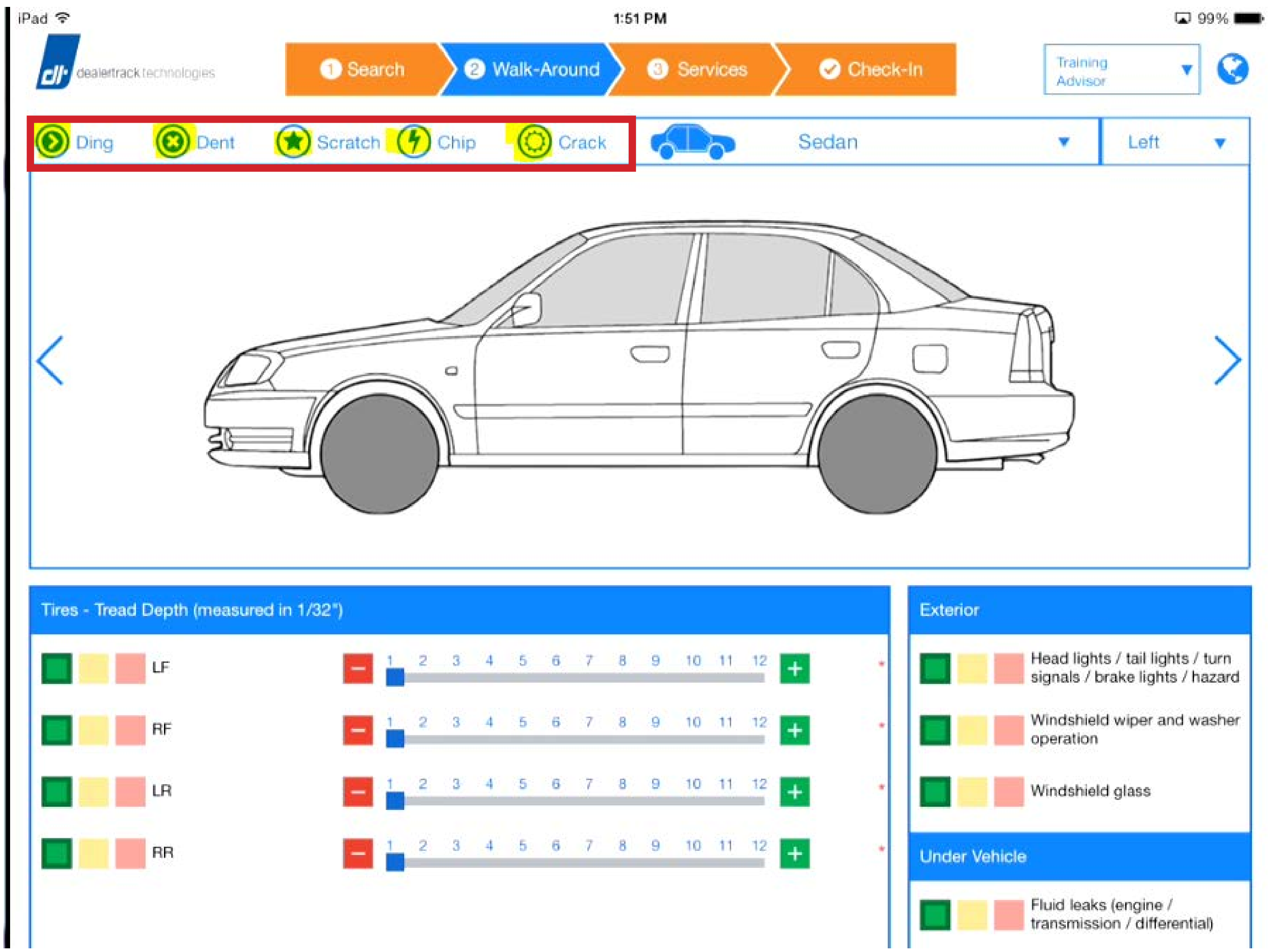
Tapping an RO# will display the lines for that RO. Tap *'Accept'*.
(You can view this history later by swiping to the right in tabs 2,3, and 4.)

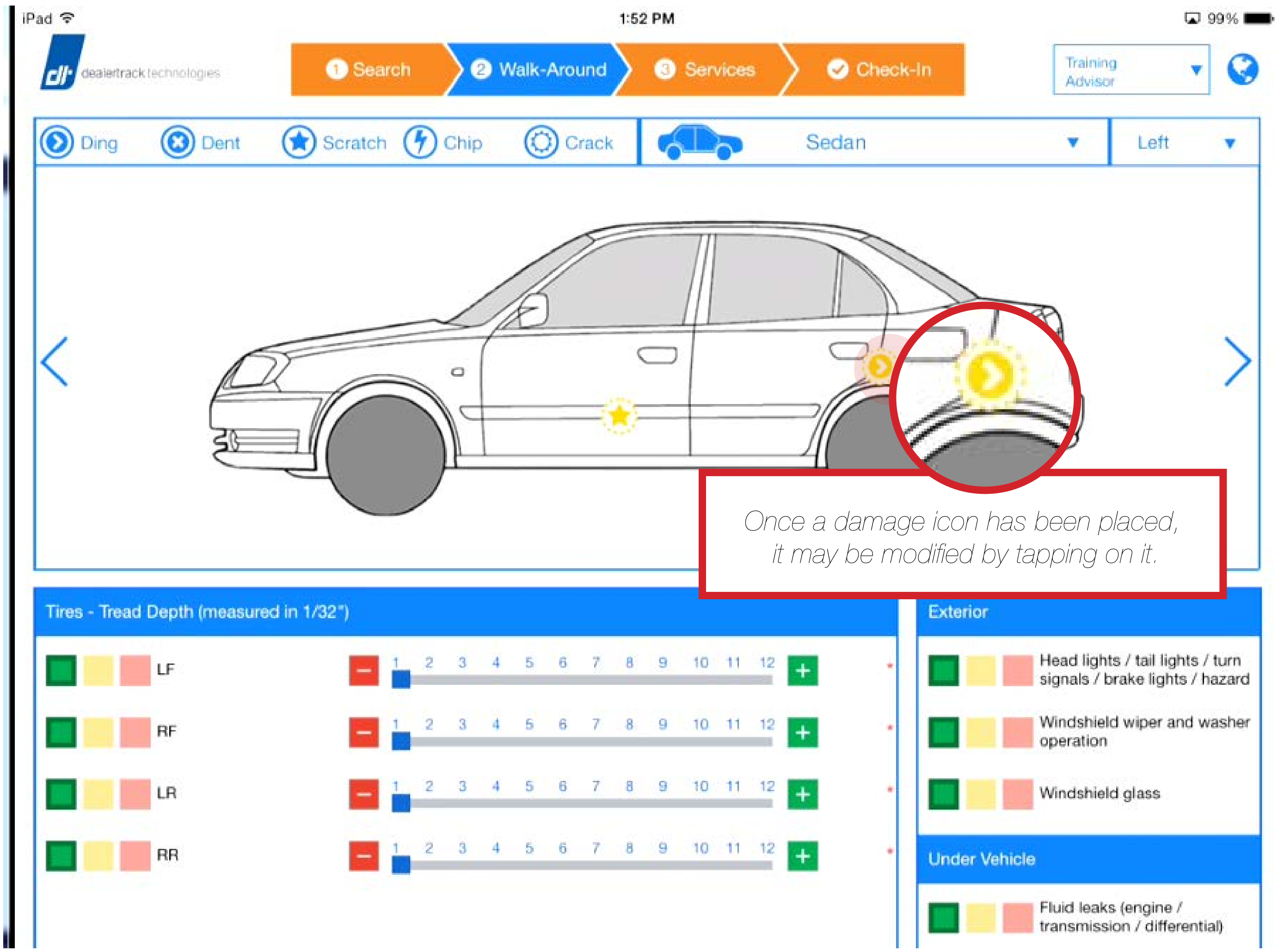


You are now in the *'Walk-Around'* tab.

The highlighted icons are *damage descriptors*. Drag the icons to appropriate spots on the form to designate damage on the vehicle.

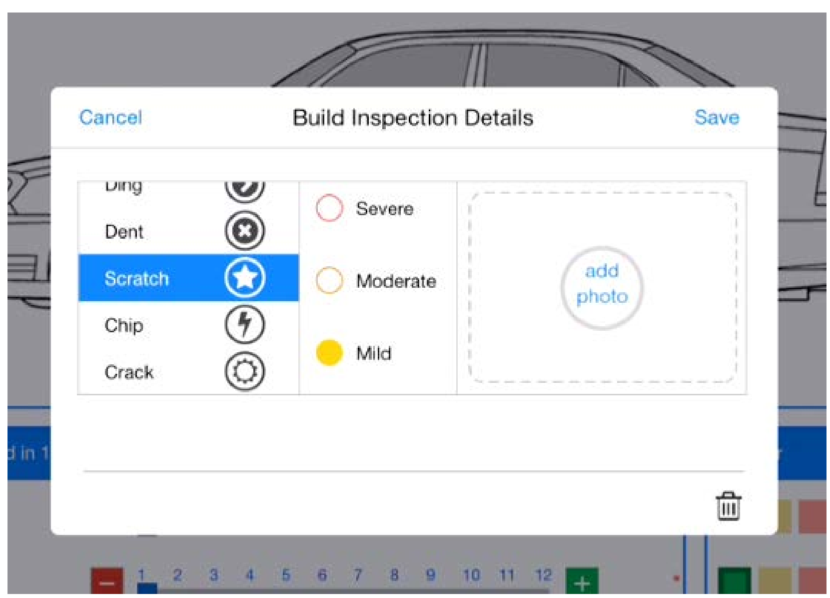
Swipe left or right on the form, or tap the arrows, as you move around the vehicle.





The default for a damage descriptor is *'Mild'*.

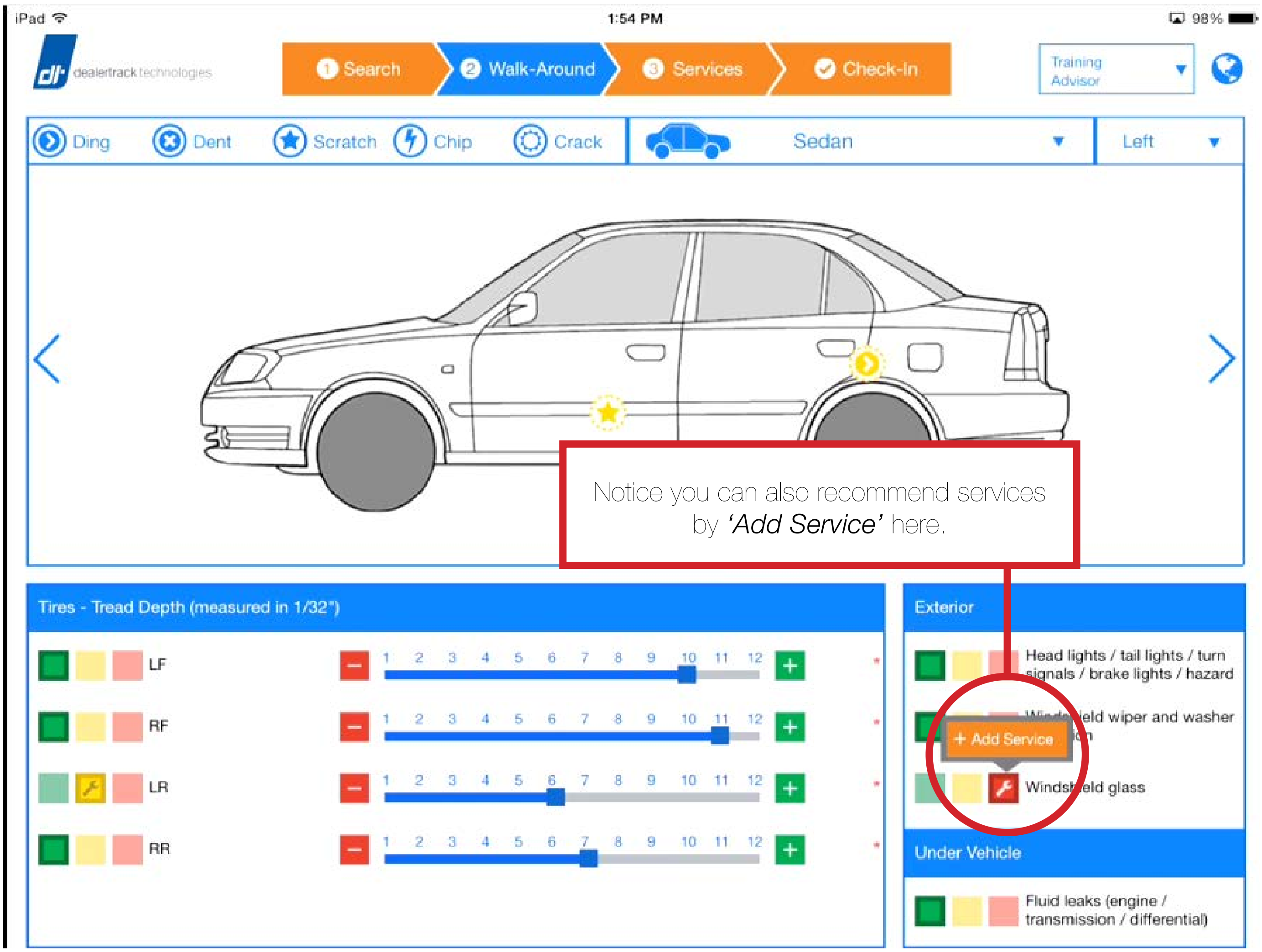
This can be changed to moderate or severe, add a photo, change the type of damage, or delete the damage (trash can icon in lower right of lightbox).



The bottom section may contain several inspection items.

For ***measurements***, the blue squares act as a slider that can be moved to the appropriate number.

For *other items*, tap the yellow or red box as appropriate.



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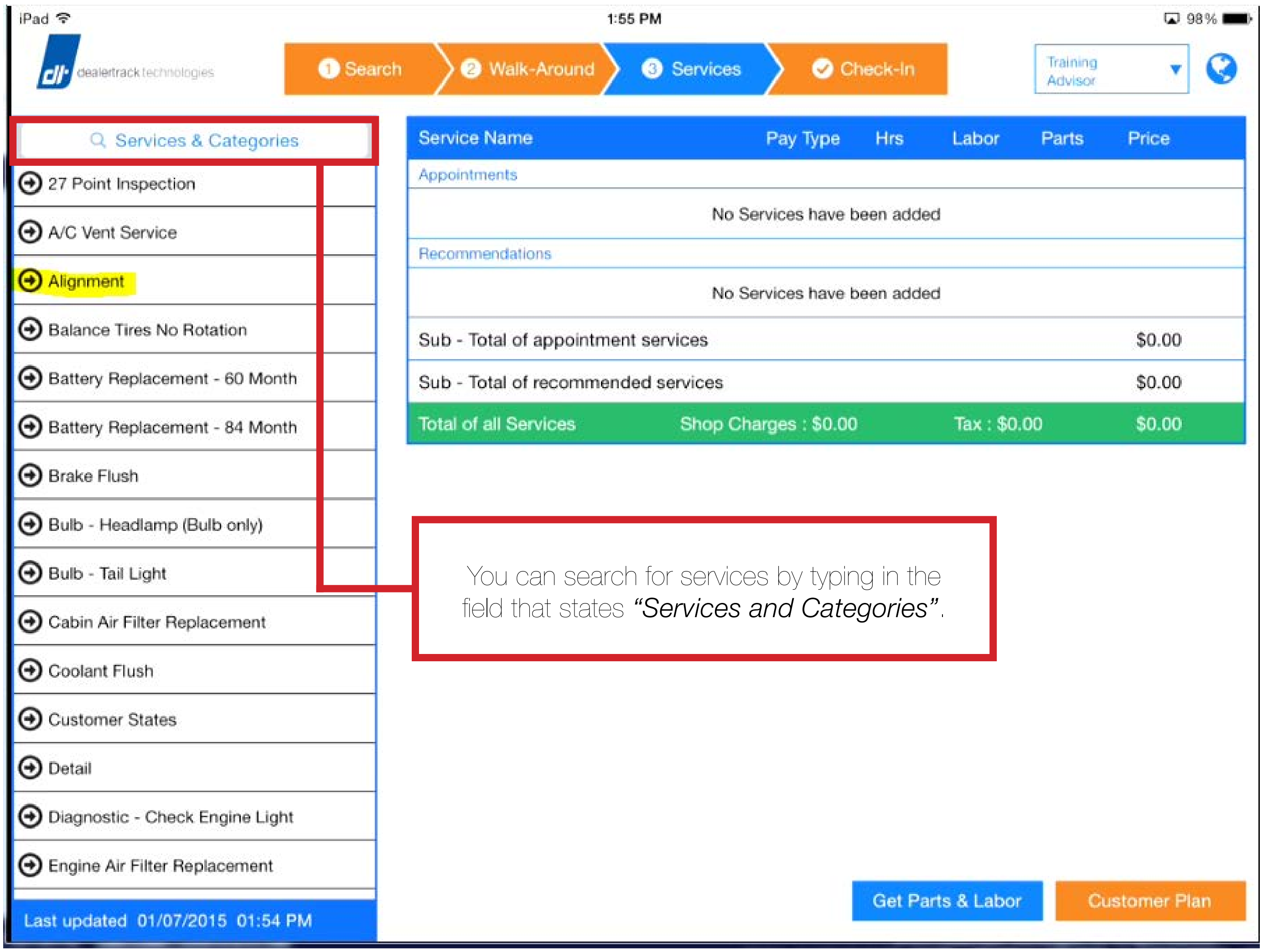
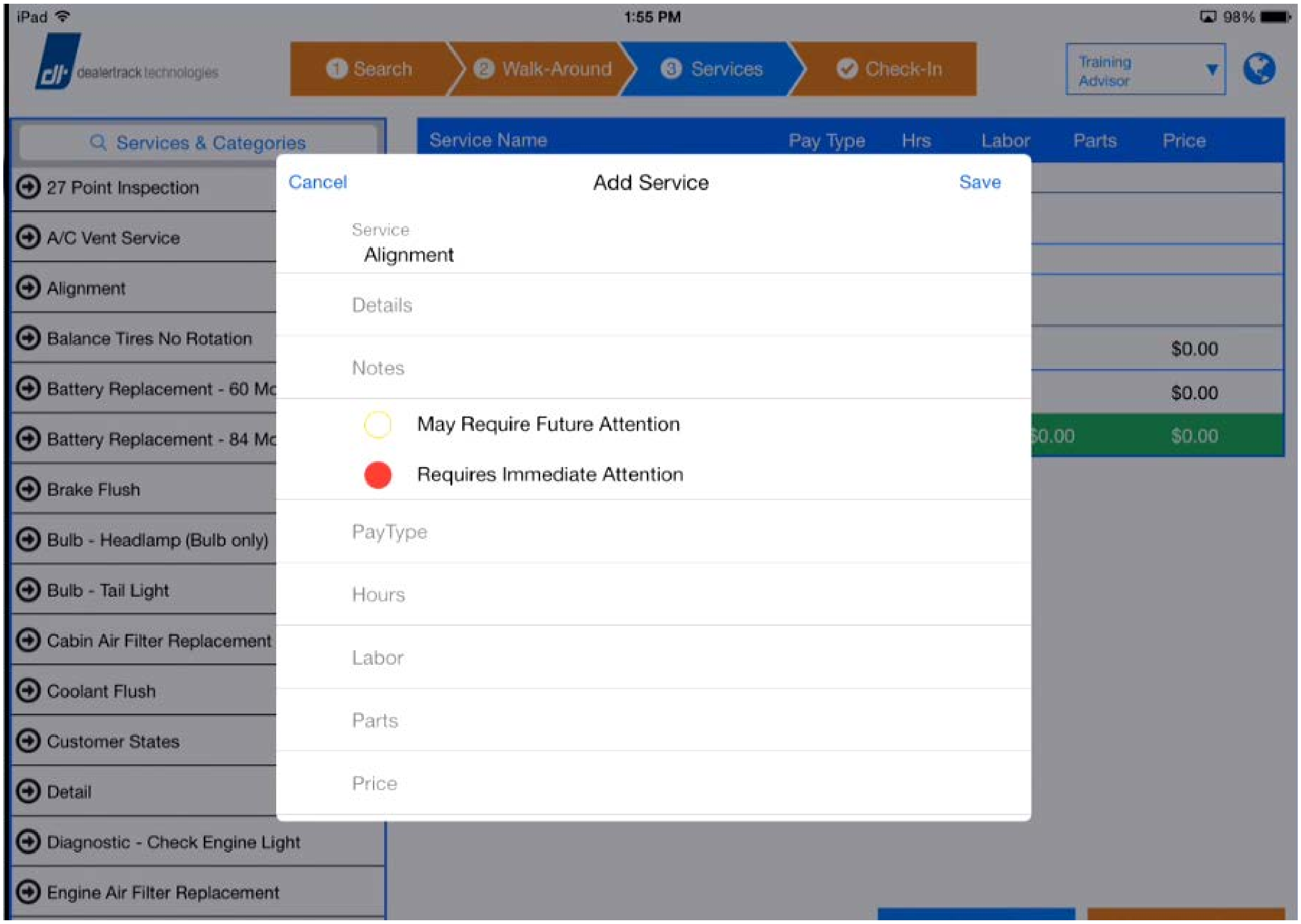
Once you have finished the walk-around, tap the *'Services'* tab at the top.

The left frame contains all the available services. The top of this list is populated by *'Fast Mover'* items. The top right box contains appointment lines and, below that, any services that you recommend.



To recommend a service, drag that service name above the green line. The *'Add Service'* box comes up and you can add details, notes, caution/fail status, modify paytype, and designate labor time, cost, parts pricing, and total price.

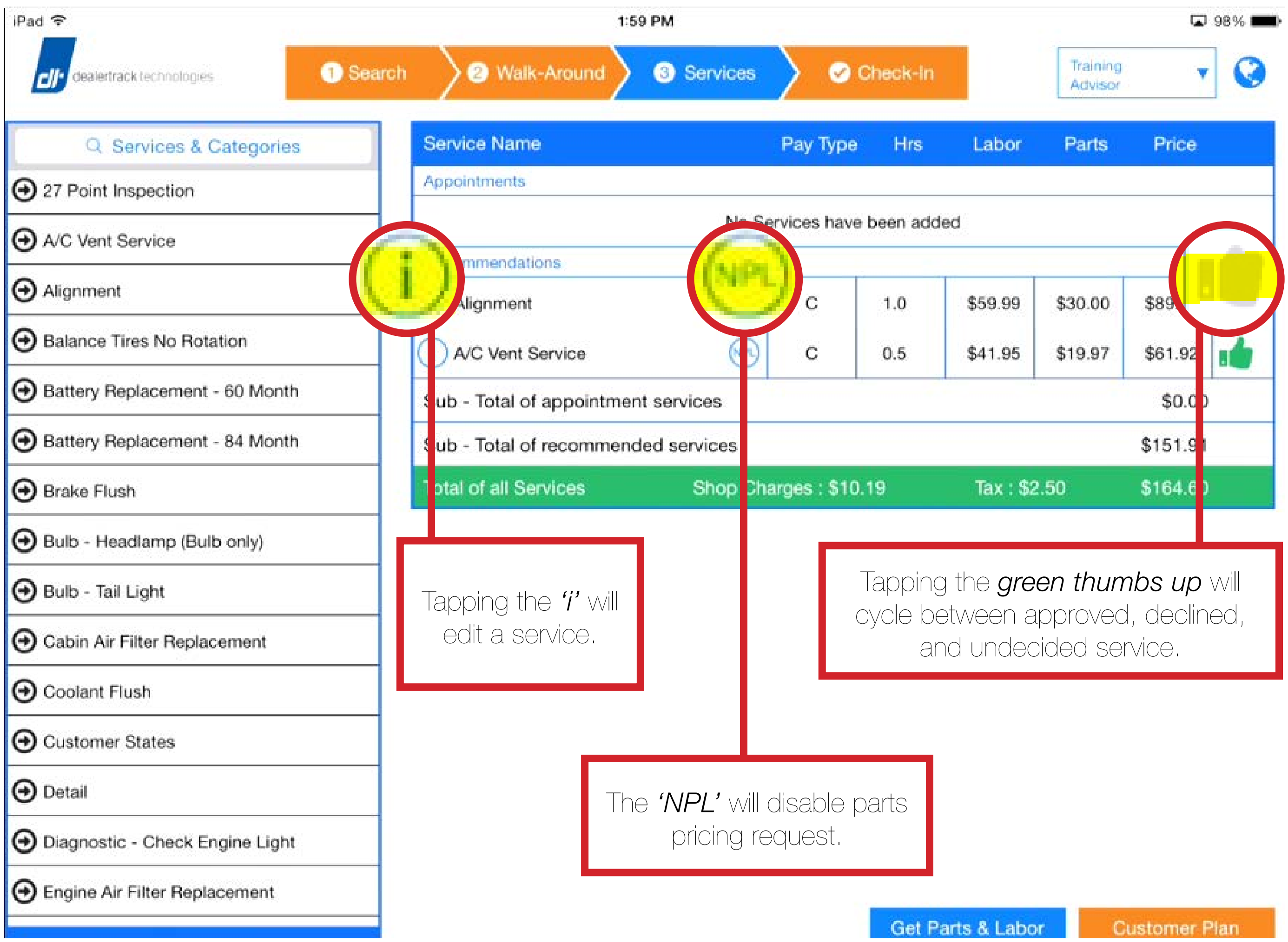
Tap *'Save'* when finished. Only the *'Service'* and *'Details'* lines will display on the Pre-RO.



Notice the yellow highlights.

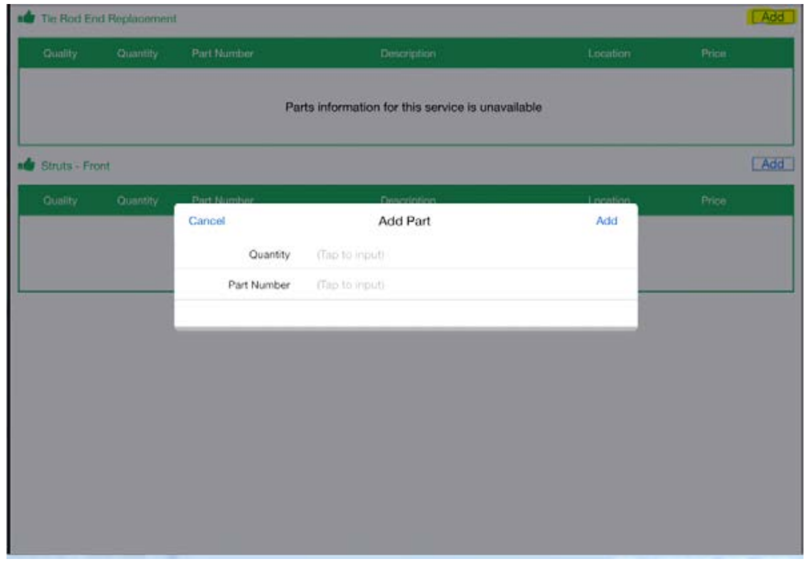
Swipe left on the service name to delete the line.

The blue button at the bottom *'Get Parts & Labor'* will access Alldata parts and labor information for recommended services.



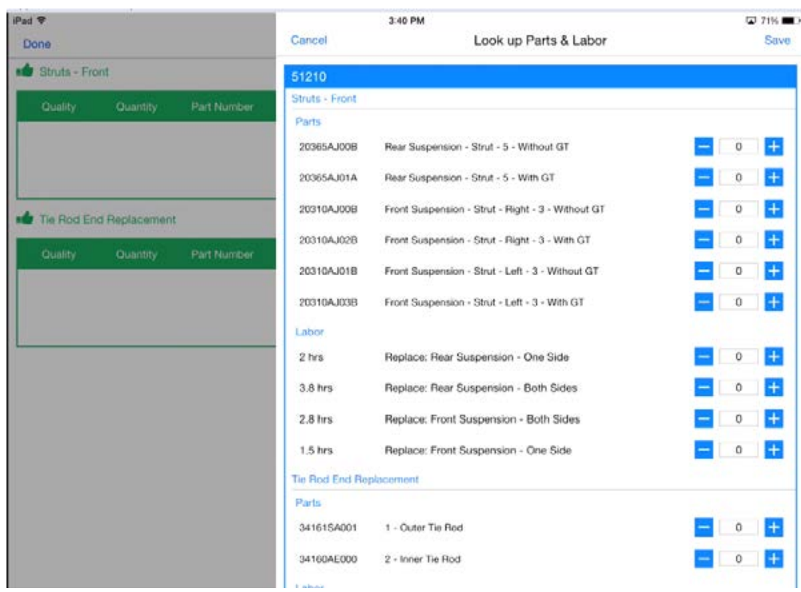
The *'Add'* button will allow you to add a part number manually. Enter the quantity and the part number, then select *'Add'*.

That part number will now be compared to DMS inventory and pricing and availability information will be displayed. The wrench icon just above the *'Add'* button will allow us to access Alldata parts and labor info.



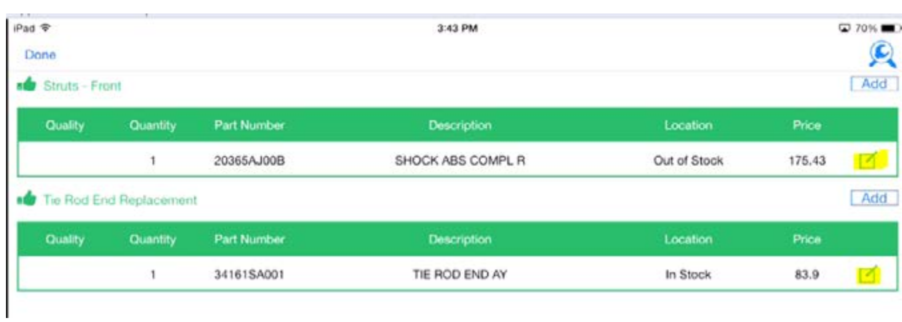
Tap the blue *'+'* to add a part number or labor time value to that service line. Once you have made selections for all the service lines, tap *'Save'* in the top right of the box.

If you selected part numbers, they will be compared to the DMS inventory and pricing and availability information will now display.



Notice the availability is listed under *'Location'*. The price you see here is price / item so, if you had selected a quantity over one, the final parts price will calculate at that quantity on our RO.

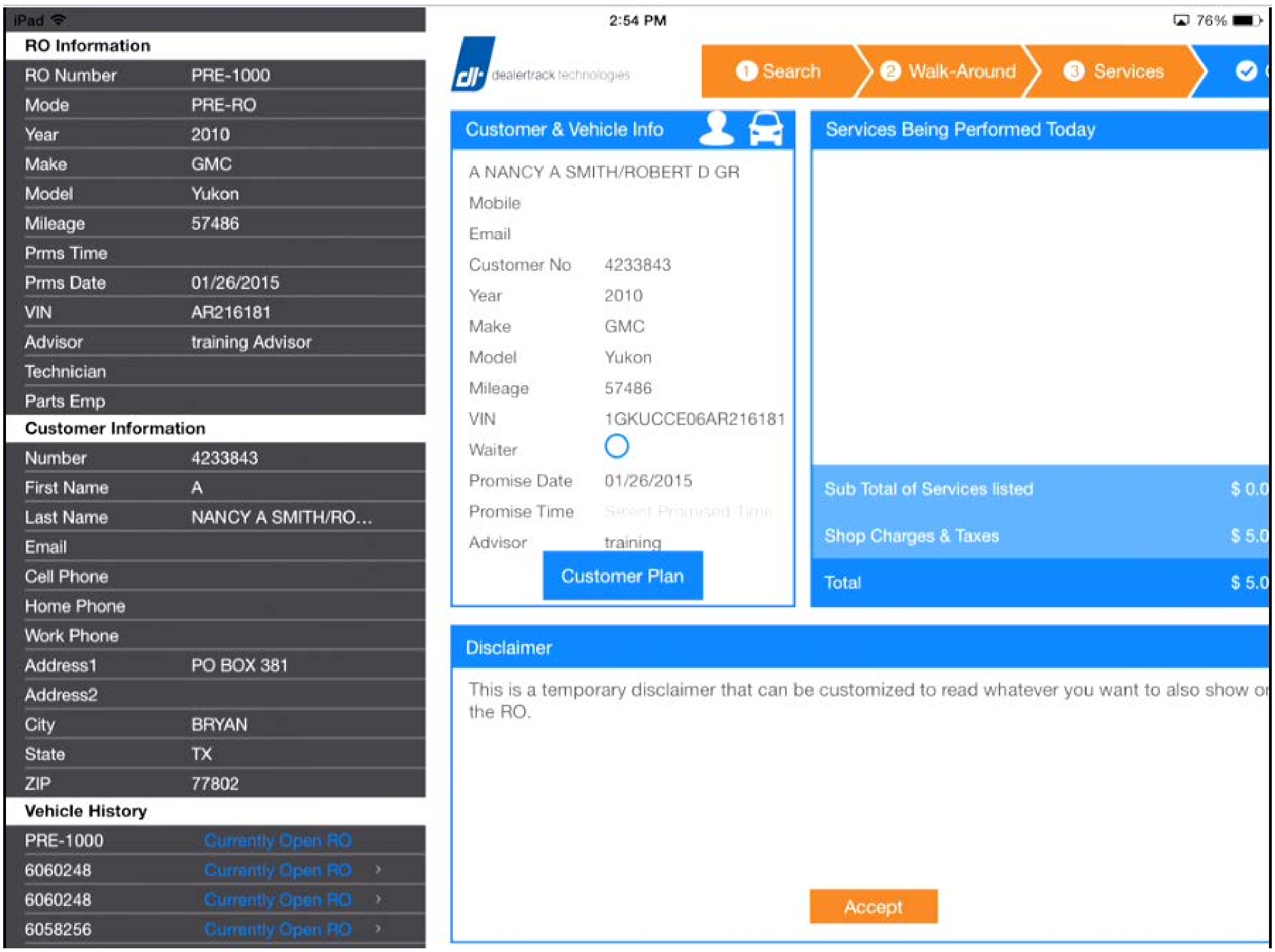
Notice the *'Edit'* icon that is highlighted yellow. From there you can modify any information on this line, or delete the part.



When finished, tap *'Done'* in the top left.

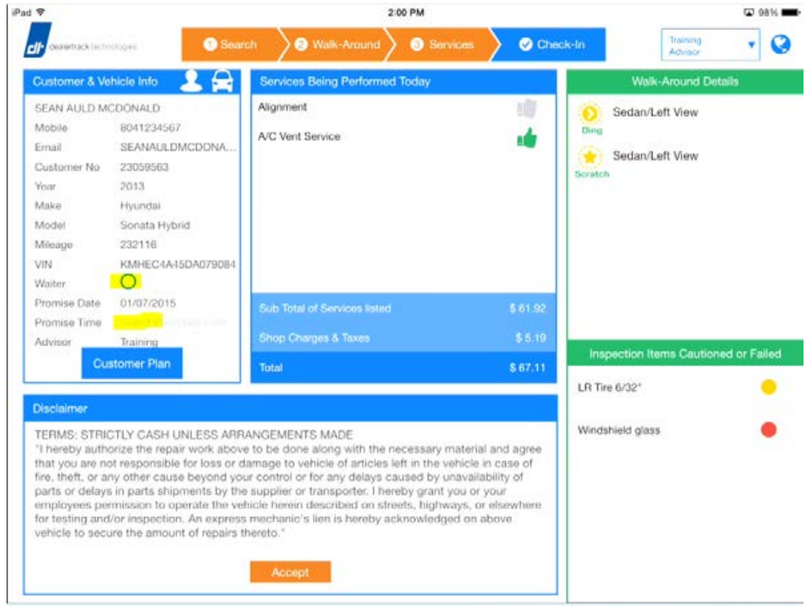
Swipe to the right in tabs 2-4 in order to view the RO and customer info, as well as the vehicle history.

Tapping the RO number under vehicle history in the left frame will display the lines for that RO.



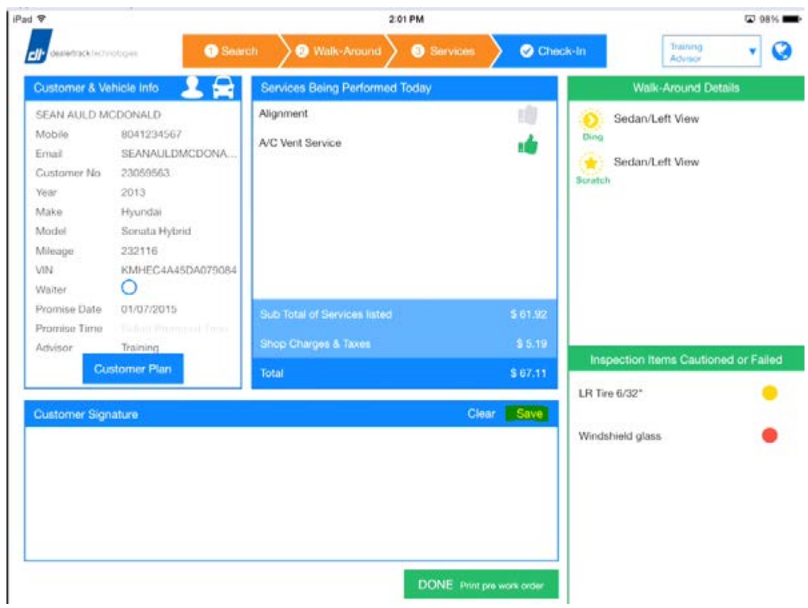
When finished adding services, tap the *'Check-In'* tab. The *'Waiter'* circle will designate this RO as a waiter in DMS.

If the RO is not a waiter, tap the blank field to the right of *'Promise Time'* to set a promise time. At this point you will display the iPad to the customer and ask them to accept the disclaimer.



The customer will now sign the signature pad. Tap *'Save'*. If you would like to print a copy of the *'Customer Plan'*, you may do so here. The customer plan will be accessible later as well.

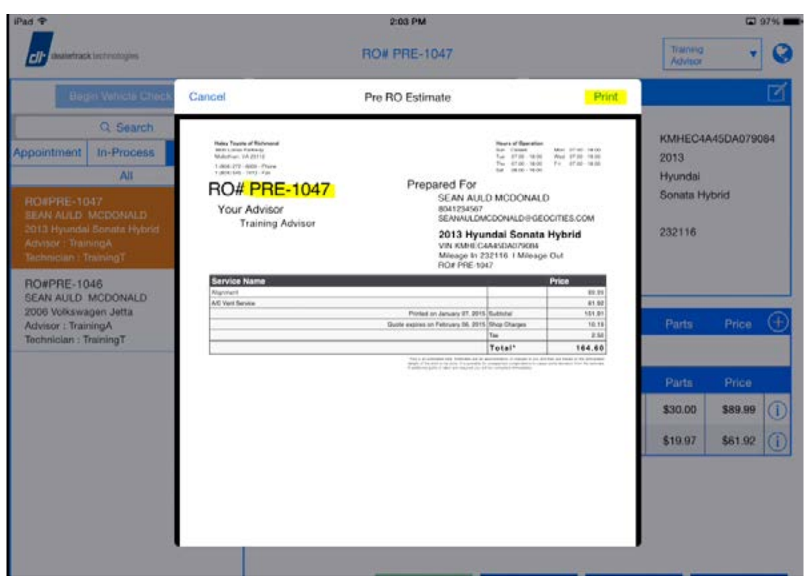
Tap *'DONE Print pre work order'*. The RO will now be pushed to DMS and be available in the Dispatch mode of Service Pro.



The Pre-RO will automatically populate.

Tap the *'Print'* button, select the printer you want to send the Pre-RO to, and tap print again.

The Check-In process has been completed.



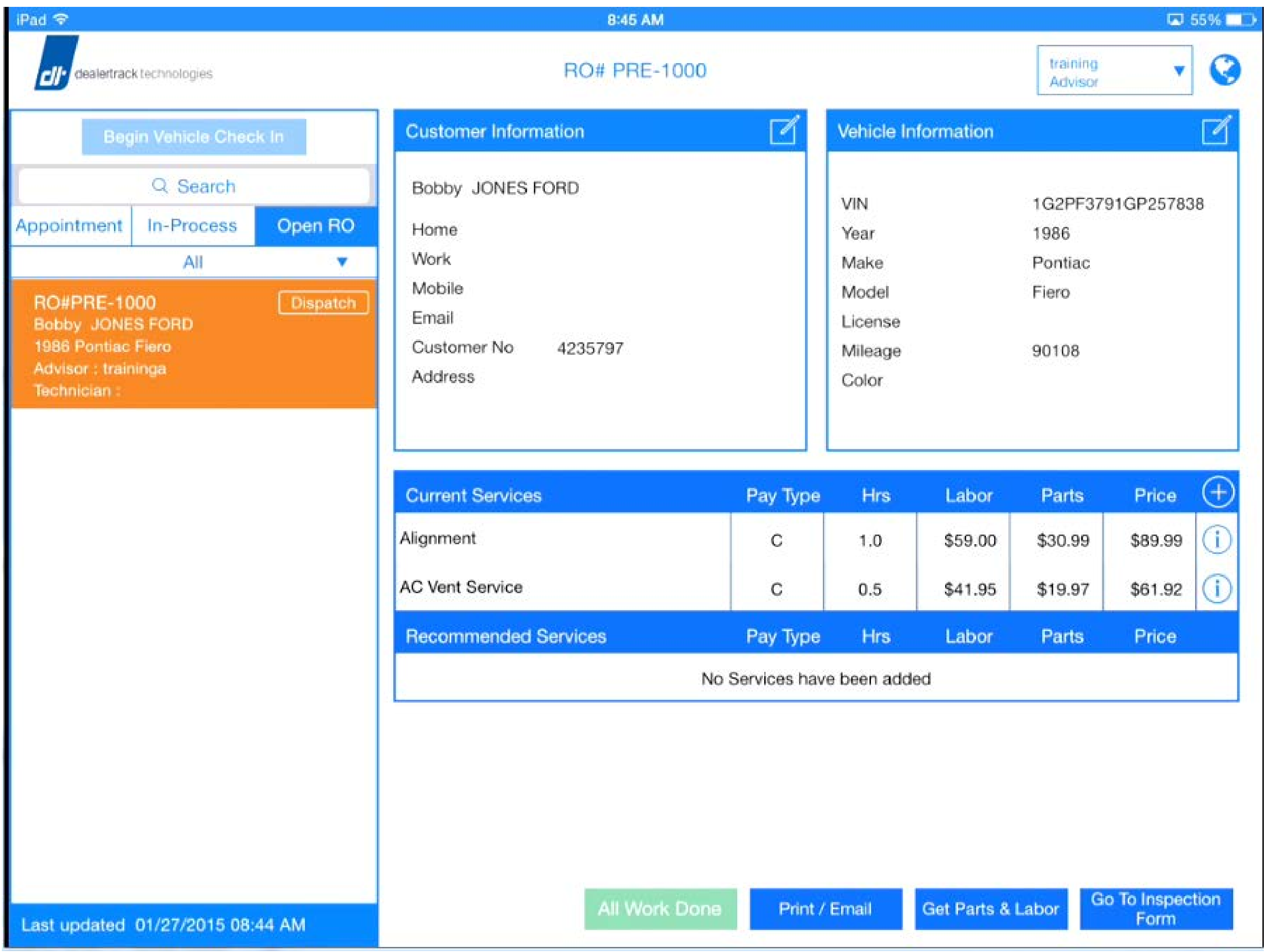
Notice in the left frame there are 3 different tabs.

'Appointment' is the tab from where you begin Check-In on vehicles.

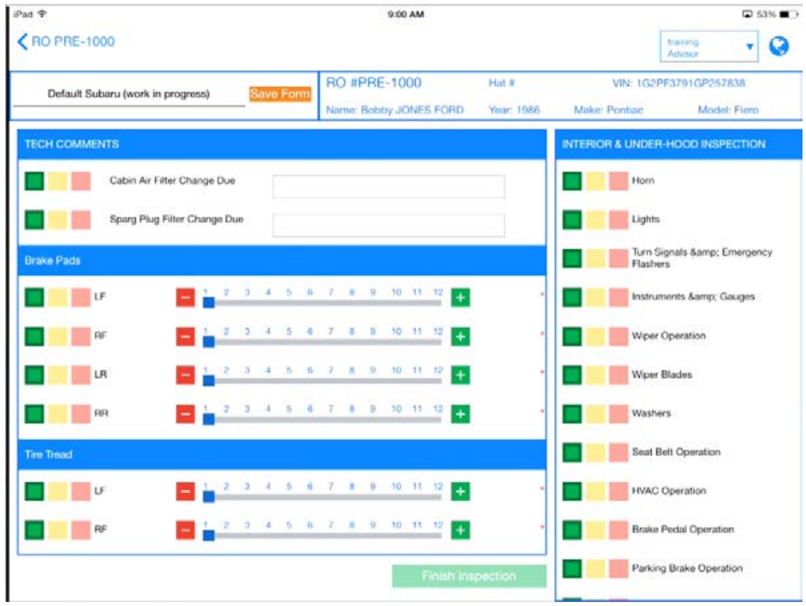
The *'In-Process'* tab contains ROs that have been started in Check-In, but not finished.

The last *'Open RO'* tab contains all the ROs that are open in Service Pro.

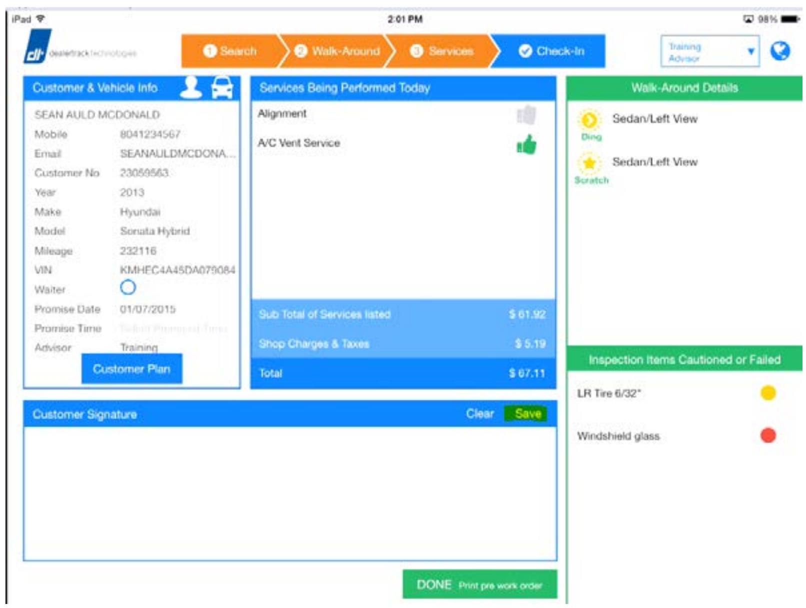
The inspection form may be viewed by clicking on the blue button in the bottom right corner.



Review the inspection form as needed.

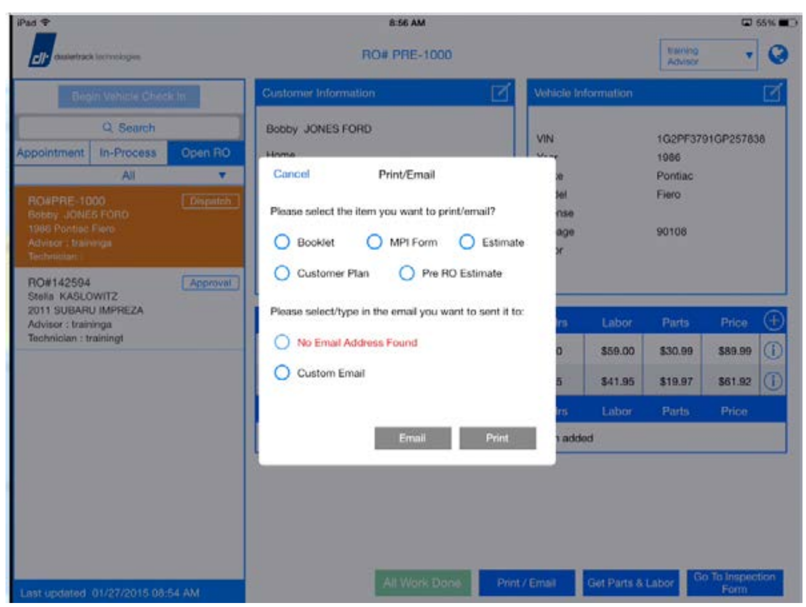


The *Print/Email* button may be used to access material for the customer.



From here, you can choose to print or email several different items. One of the items that may be printed from here is the *'Customer Plan'*.

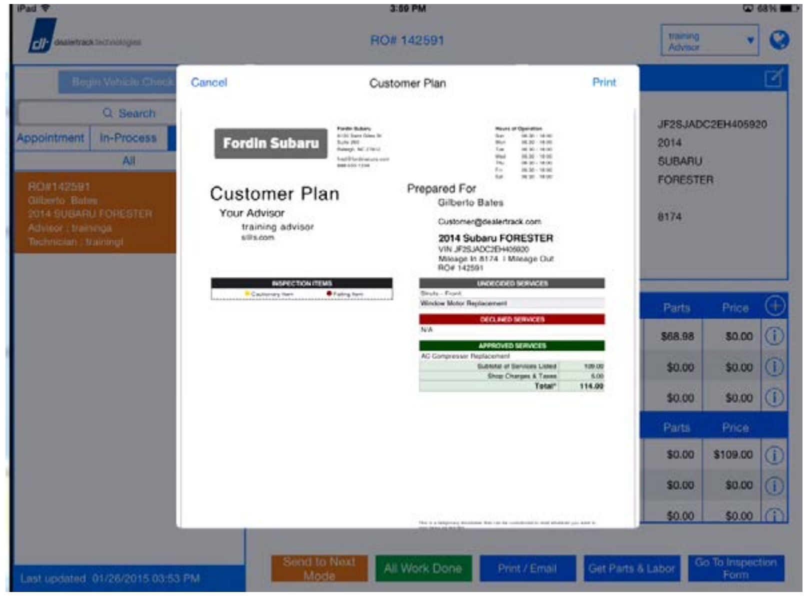
You may have seen the *Customer Plan* button in other areas of the App as you were completing the Check-In process.



The customer plan is a plan of action that you can give to your customers.

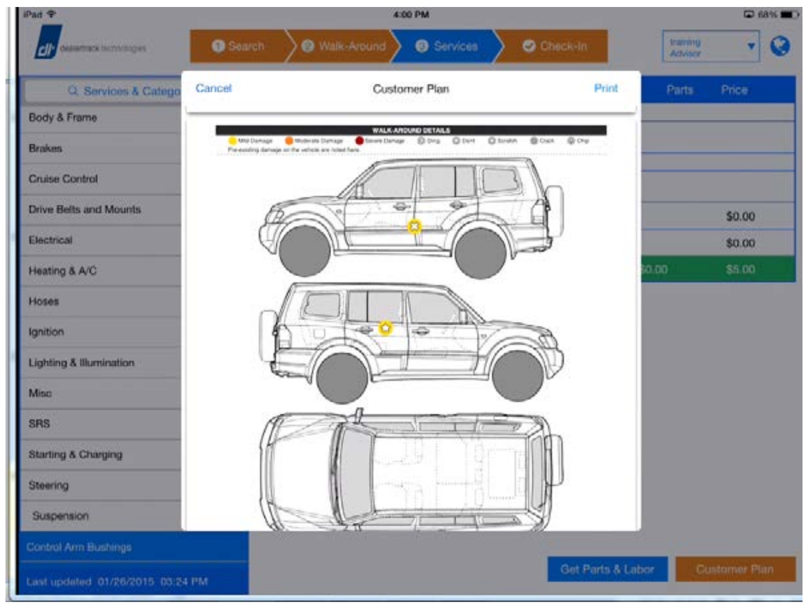
The right column displays all of the approved, undecided, and declined services that you had added in Check-In.

On the left, any items you filled in on the inspection form in Tab 2 (Walk-Around).



The second page of the plan has the damage walk-around that you completed. The customer's signature from the *'Check-In'* tab will display on the customer plan in addition to the *'Pre-RO'*. These items can be e-mailed as well.

Note: This damage walk around is visible in Service Pro desktop under *'Damage Details'*.

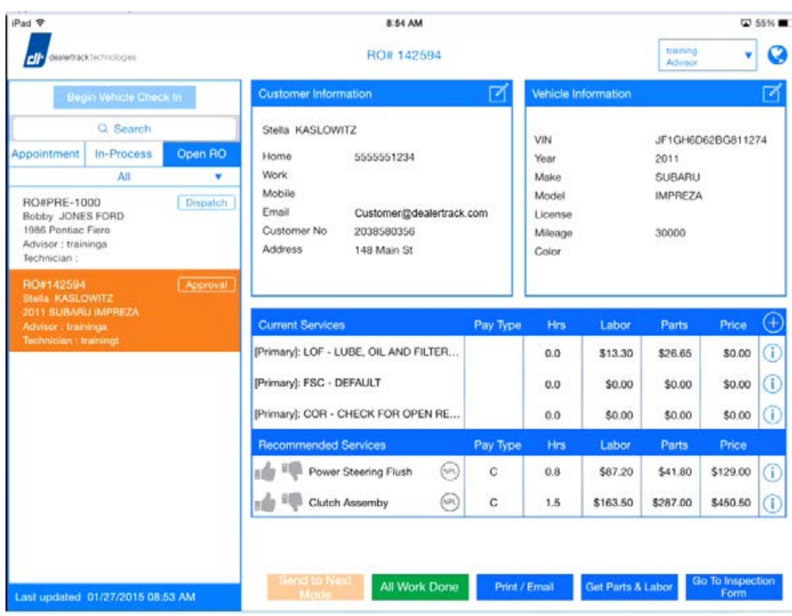


Check-In can also be used to view, modify, and approve service recommendations by the technician.

Notice in the left frame the *'Mode'* is displayed to the right of the RO#.

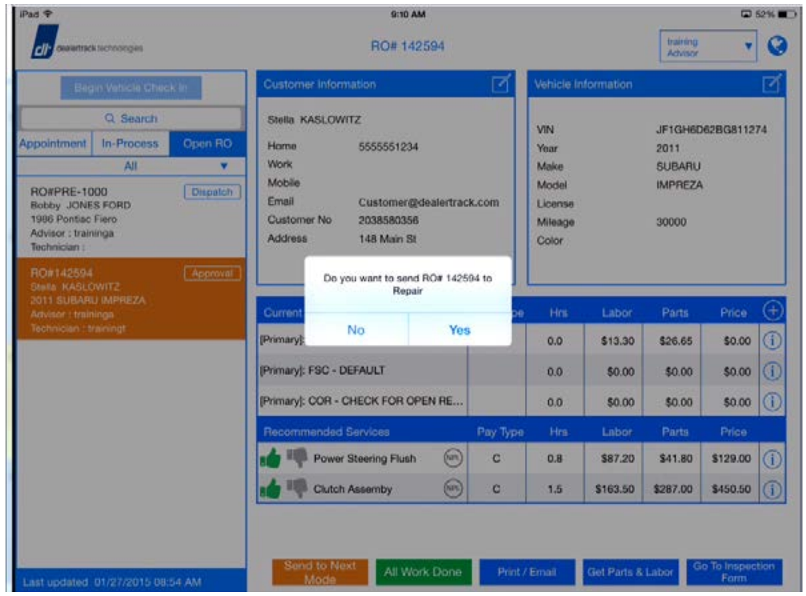
Tap *'i'* on the right hand side of the service line to modify pricing details.

Tap the *thumbs up / thumbs down* icons as necessary to approve or decline services.



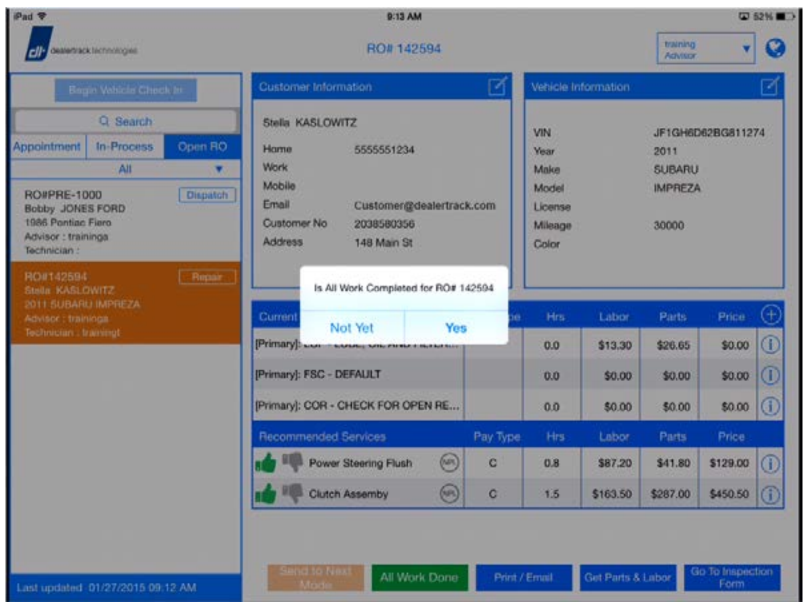
Once a decision has been made on a service recommendation, the *'Send to Next Mode'* button will be highlighted orange. Tapping this will ask you to confirm to send the RO to Repair (back to the technician).

Remember this will also writeback the approved lines into DMS if writebacks are enabled.

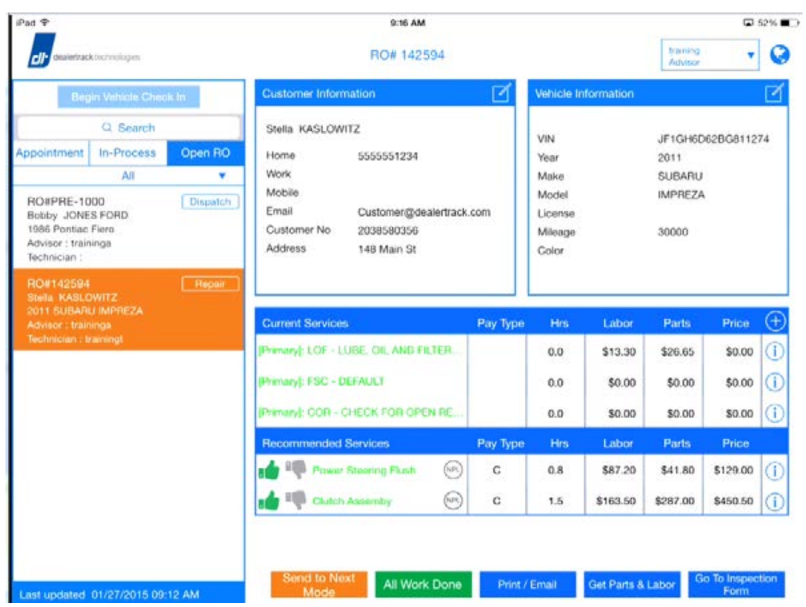


Also present in this series of buttons is a green *'All Work Done'*.

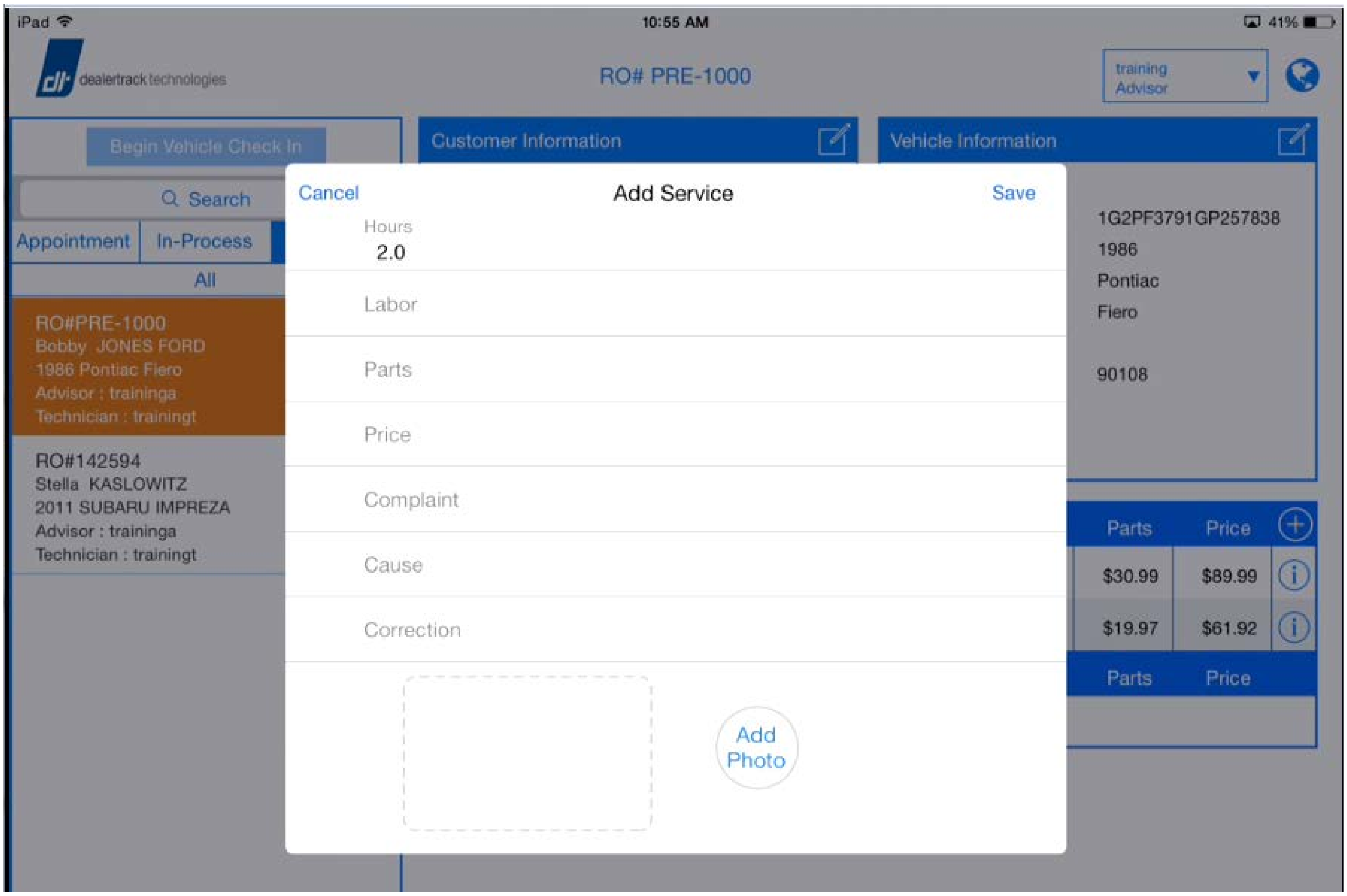
Selecting this asks you to confirm that all work on the RO has been completed. Selecting *'Yes'* will mark all the lines as *'Done'* in Service Pro.



Notice completed lines are highlighted green. The blue *'+'* on the far right of the *'Current Services'* box will let you add a service.

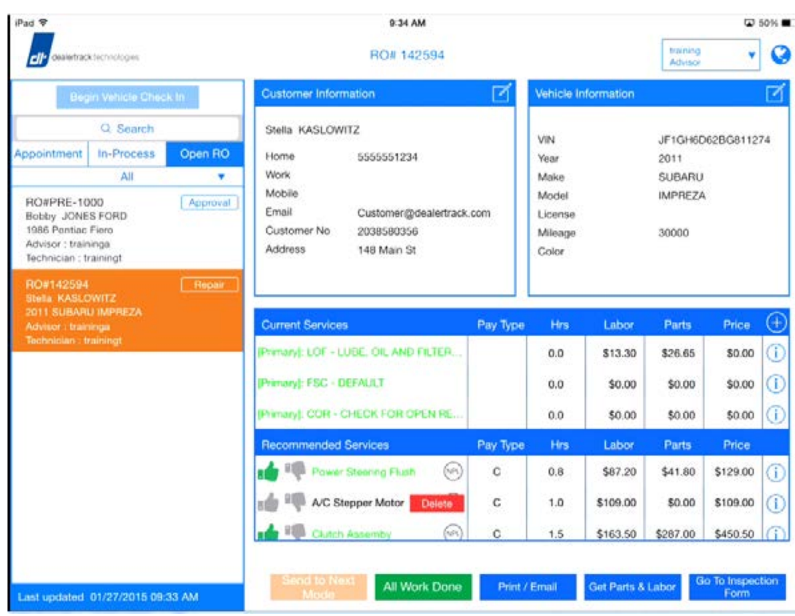


You have the ability to attach a photo to a service recommendation. This photo will be present in place of the stock photo Service Pro has for that repair.

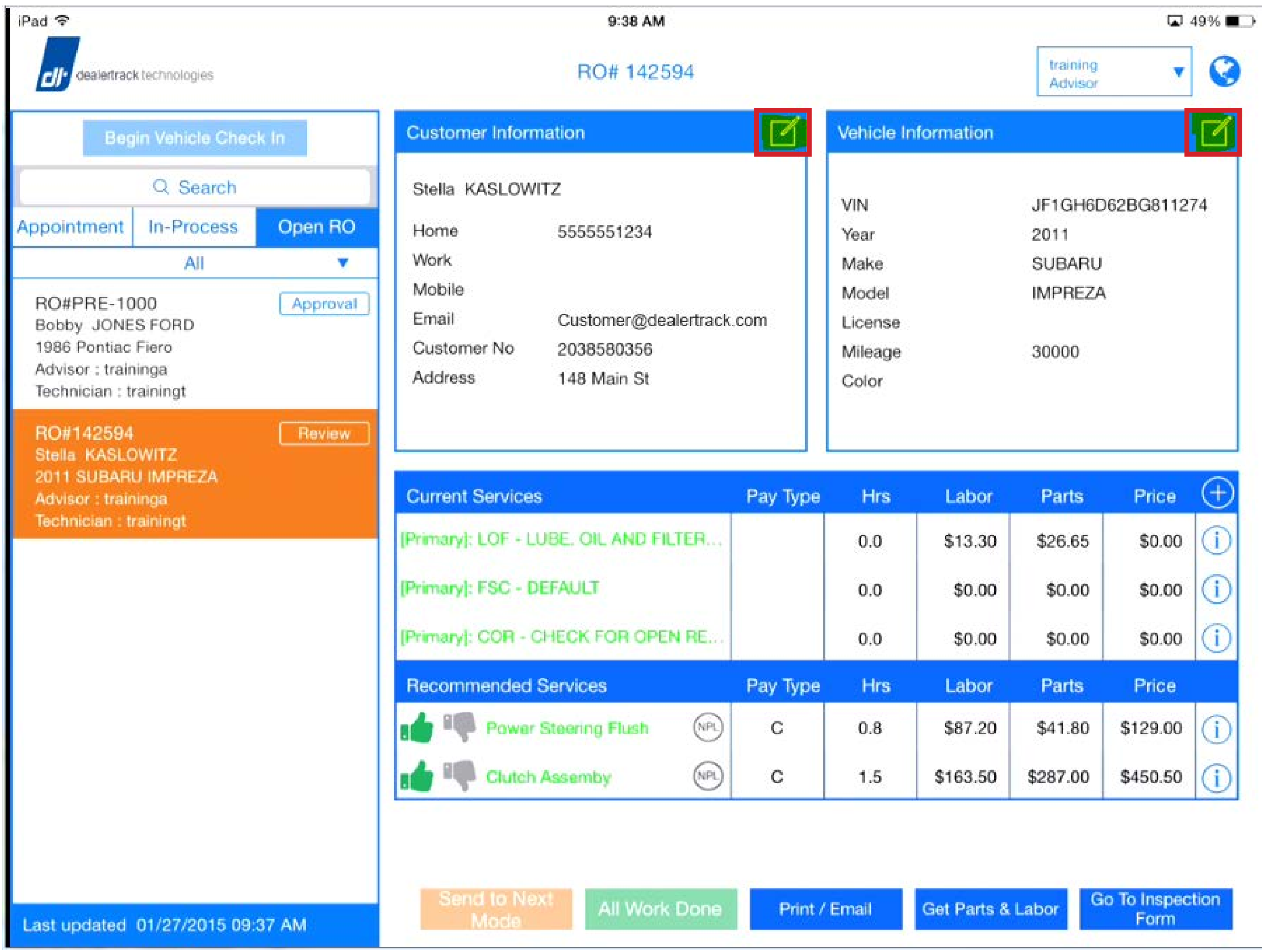


Swipe to the left on a service line to delete it. Services with *'0'* hours most often cannot be approved or declined.

Tap *'i'* to modify labor time, pricing, paytype, etc.

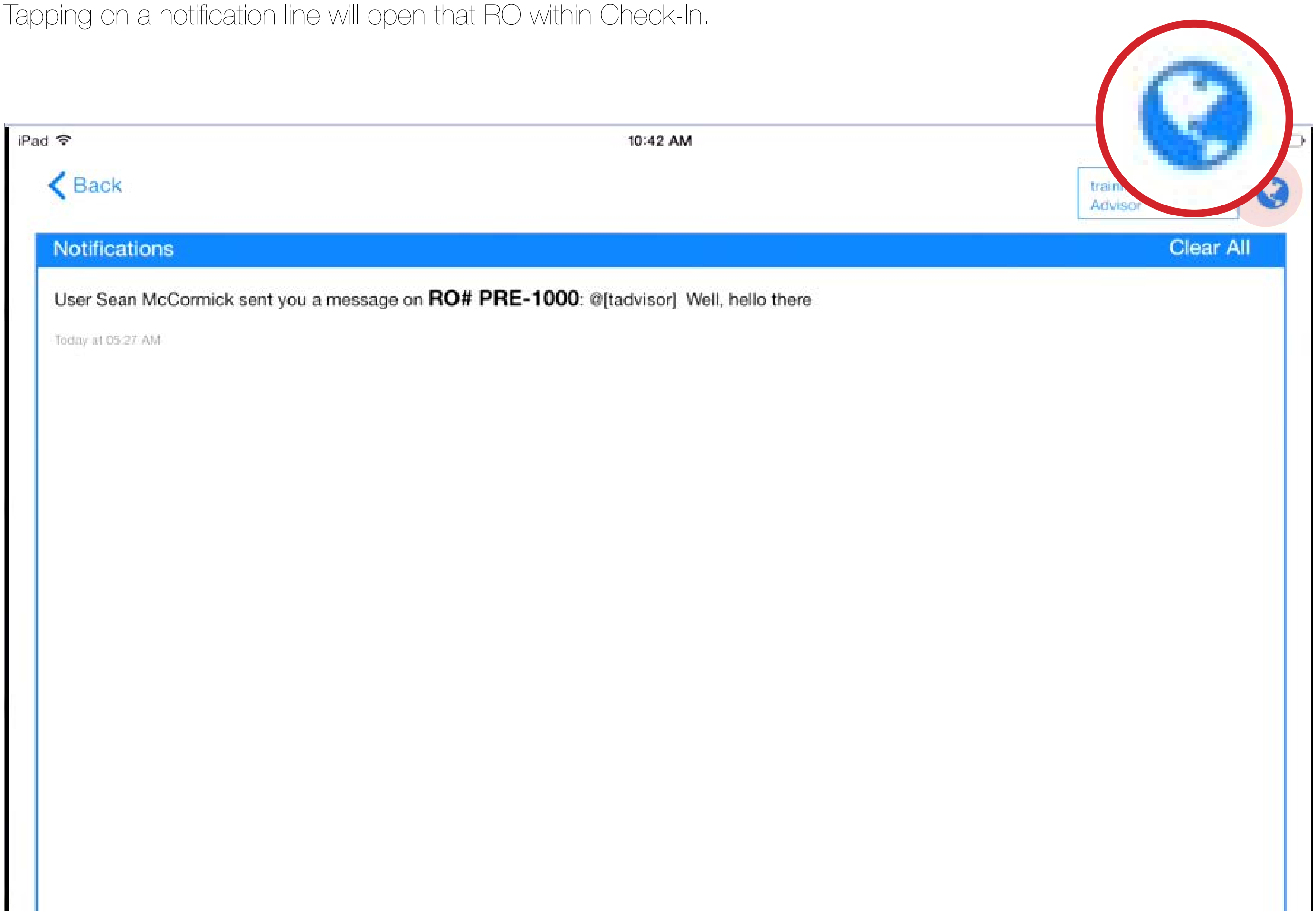


The edit icon in the top right of the *'Customer Information'* and *'Vehicle Information'* boxes will let you modify some of this information, but Check-In only updates this in the DMS during the initial generation of the RO (when the Pre-RO is automatically populated). These modifications would reflect in Service Pro / Check-In only.

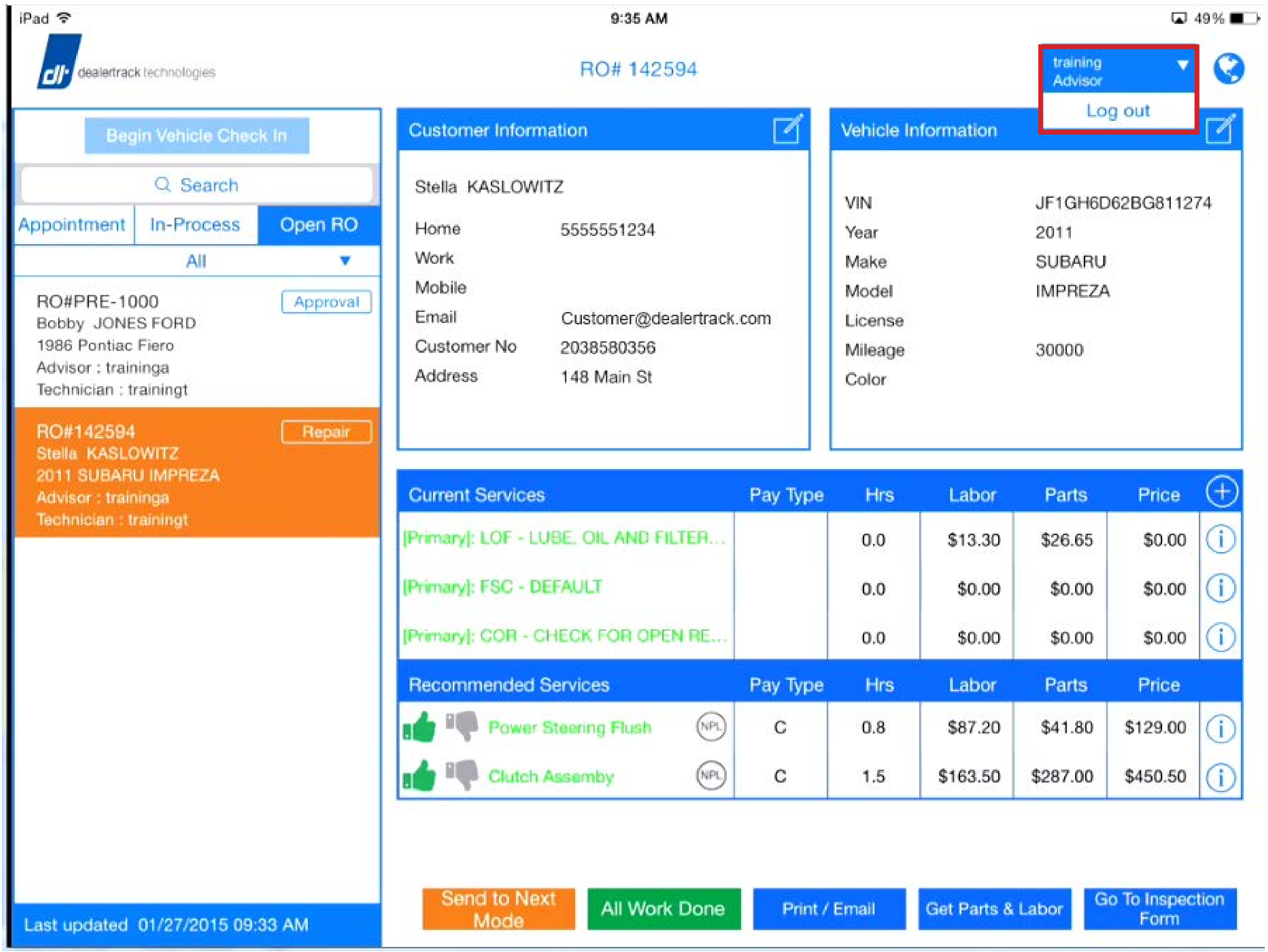


Tapping the globe in the top right will access a list of recent notifications received (these may be setup under the *'Manage Account'* tab in the desktop version of Service Pro).

Tapping on a notification line will open that RO within Check-In.



The top right corner of the screen displays the name of the user currently logged in. Tapping allows you to log out.



Please call **1.888.927.7770** if you have any questions about Service Pro Check-In.

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