



# Shop Training Manual



# Auto Integrate Advantages

## Independent Vendors

Auto Integrate will help you streamline all of your Enterprise Fleet Management vehicle orders. By utilizing the online platform, you will receive many advantages, including:

**Enrollment** – Easy on line process to enroll your shop into the Auto Integrate system at no cost.

**Speed** - After submitting the request online, you will either receive an immediate confirmation to proceed, or, where the Fleet Management Companies must refer the request to the customer, the shop will receive a system update as soon as the approval has been granted. The majority of all preventative maintenance repairs are approved in less than 3 minutes.

**Convenient** - Independent shops no longer have to phone in and provide details of required work to their fleet management company and wait on the telephone for authority to complete.

**Invoicing and Payments** – You are no longer required to print and fax invoices for payment. Options to receive ACH electronic payments within 24 hours of completing repairs are available.

**New Business** – Fleet Management Companies prefer repair shops that submit estimates electronically through Auto Integrate. This will lead to more referrals for independent shops. Those shops that adapt to Auto Integrate will gain a competitive advantage.

**Secure** - A secure login provides access to a system interface that has been designed to make entering details of required work and gaining authorization to proceed with repairs as simple as possible.

**Fully audited** – This will ensure the work agreed upon by both parties will be billed and paid. This removes the potential for accounting discrepancies and any costly write offs.

**Simple user interface** - Auto Integrate has been developed to be simple and easy to use and is available on the web. This means there is no requirement for investment in new equipment or to download any new software.

**Centralized** – Independent shops will be able to submit transactions with all Fleet Management Companies using the Auto Integrate platform. (Currently using Auto Integrate: Enterprise Fleet Management, Donlen, EMKay, with more converting in the future.)

# CREATE A REPAIR ORDER



[Home](#) [Repair Orders](#) [Administration](#) [Support](#)

## Repair Order Manager

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

### Account Information

There are Fleet Management Companies using this platform that you have not accepted terms and conditions for.

In order to trade with these companies please [click here to review and accept the terms and conditions](#).

[Add New Repair Order](#)

### Find Existing Repair Orders

RO ID	<input type="text"/>	Status	<input type="text" value="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](#)

[Repair Orders](#) ✓

[Archive](#) ✓

RO ID	VIN	Origin	Client	Due	Submitted	FM Company	Make	Model	Status
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Click  
"Add New Repair Order"

## Add New Repair Order

Step 1: Select Vehicle

**Search for Vehicle**

Select fleet company, enter VIN and press Search.

Fleet Company  VIN

- Select One
- Donlen
- EMCAY
- Enterprise

Select "Enterprise", enter VIN, and click "Search"

## Add New Repair Order

Step 1: Select Vehicle

**Search for Vehicle**

Select fleet company, enter VIN and press Search.

Fleet Company  VIN (last 8 chars)

VIN	License Plate	Make	Model Code	Model Description	Client
XXXXXXXXXXXXXXXXXX		Ford	F-150	F17	Enterprise EFM Fleet Ops -TEST CUST#:

Click on VIN after verifying this is the correct unit you are working on

**Enterprise Terms & Conditions**

As an independent repair shop, by registering with and using the Auto Integrate platform, you confirm that you have read and agree to the terms and conditions of this website. For electronic payments (ACH), 2.00% will be deducted by Enterprise Fleet Management from the gross total of each transaction processed through Auto Integrate. For all other payment types there is NO fee charged by Enterprise Fleet Management.

You also certify that you are authorized by your company to bind the entity registering (the "Registered Service Provider") herein and that Enterprise Fleet Management may rely on this certification.

In order to receive payment from Enterprise Fleet Management, you must complete and fax the documents provided within the registration process to Enterprise Fleet Management. For electronic payment, please complete the Enterprise Fleet Management "Electronic Payment Authorization" form and fax this along with a cancelled check to the number stated on the form.

Failure to complete these forms will result in delayed payment for completed repair orders.

If the transaction is processed through a national account then all payment terms and fees are bound by that national account agreement.

## Add New Repair Order

Step 2: Enter Odometer Reading

**Vehicle Details** | FMC Details | Client Details | AME Details | Defect History

<b>FMC Unit Id</b> 2009EV	<b>VIN Number</b> XXXXXXXXXXXXXXXXXX	<b>Driver Name</b> 	<b>Model Year</b> 2000	<b>Make</b> Ford
<b>Model</b> F-150 - F17	<b>Color</b> Unknown	<b>License Plate</b> 	<b>Contract Type</b> Maintenance Management (MMX)	<b>Transmission</b> Automatic
<b>Fuel Type</b> Unknown	<b>Vehicle Status</b> Active			

Odometer Reading

Enter Mileage and click "Next"

## Shop Details

Shop Contact Name

Shop Call Back Number  ext.

Invoice Number

Vehicle Arrival Date

Vehicle Arrival Time   PM

Driver Name

Driver Phone Number  ext.

Driver Card Number

Driver Is Waiting

Vehicle Towed

Payment Type

Payment Direction

Driver Complaint

Continue

Cancel

Enter your name here

Enter your Invoice Number, and select time/date of vehicle arrival

Enter brief description of what vehicle was brought in for (driver request, your findings, etc...)

## Repair Order Details

Use this page to add/view line items on a repair order



**Repair Order ID: 6004439 Invoice Number: 1123455 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
<b>FMC Unit Id</b> 2009EV	<b>VIN Number</b> XXXXXXXXXXXXXXXXXX	<b>Driver Name</b>	<b>Model Year</b> 2000	<b>Make</b> Ford		
<b>Model</b> F-150 - F17	<b>Color</b> Unknown	<b>License Plate</b>	<b>Contract Type</b> Maintenance Management (MMX)	<b>Transmission</b> Automatic		
<b>Fuel Type</b> Unknown	<b>Odometer Reading</b> 12345	<b>Engine Idle Hours</b> Not Entered	<b>Vehicle Status</b> Active			

PM
**Repair/Service**
Tires
Fees
Damage
Select Quick Repair

No line items have been added to this repair order

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) \$0.00**

←  
Return to ROM

✖  
Cancel Repair Order

**Add repairs to estimate**  
 Select appropriate tab:

- Repairs/Services
  - Steering, Drivetrain, Preventative Maintenance
- Tires
  - Tire related repairs
- Fees
  - Inspections, Tows, Etc..

## Add New Repair Order Item

Please search or navigate the available service codes below. To navigate through the service codes click on the names, to add a service code click on the check box next to the name.

### Search for Service Code

Search  (example: brake fluid)

Browse All Service Codes

### Service/Repair (26)

<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 (49)	<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"/> Transmission and Drivetrain (29)
<input type="checkbox"/> Diagnostics (11)	<input type="checkbox"/> Miscellaneous (24)	<input type="checkbox"/> Windows and Glass (7)
<input type="checkbox"/> Engine, Cooling and Exhaust (6)	<input type="checkbox"/> Powertrain Management (11)	<input type="checkbox"/> Wiper & Washer Systems (54)
<input type="checkbox"/> Equipment (14)	<input type="checkbox"/> Preventative Maintenance (50)	

### Search by term:

- Most common search terms can be found here

### Browse by service code:

- To see list, click on “Browse All Service Codes”

### Search by category:

- If you see number in line item, click on line item to open up further sub categories
- To select line item, click on white box next to line item

## Add New Repair Order Item

Service Code: Preventative Maintenance > Semi-Synthetic Lube Oil Filter

### Labor

To only charge for parts please ensure all the labor items are unticked.

Select	Correction	Description	Job Description
<input checked="" type="checkbox"/>		Non Listed Labor	

### Parts

Select	Service Code	Parent Name	Part Name	Description
<input checked="" type="checkbox"/>		Semi-Synthetic Lube Oil Filter	Non Listed Part	

### Helpful Hints:

- If service is a “Menu”, uncheck box for Labor
- If no parts are required, uncheck box for Parts

## Add New Repair Order Item

Service Code: Preventative Maintenance > Semi-Synthetic Lube Oil Filter

Line Item	Time (Hrs)	Rate (\$/Hr)	Unit Cost	Qty	Total Cost
Labor Correction: <input type="text" value="Select One"/>	<input type="text" value=""/>	<input type="text" value="95.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="1"/>	<input type="text" value="\$0.00"/>
Part Name: Semi-Synthetic Lube Oil Filter			<input type="text" value=""/>	<input type="text" value="1"/>	<input type="text" value="\$0.00"/>
Part Code: <input type="text"/>					
Manufacturer Name: <input type="text"/>					

**Other Details**

Cause:

Notes:

Enter values in the following fields:

- Labor Rate
- Labor Time
- Part Price
- Part/Labor Quantity

Select appropriate:

- Labor Correction
- Cause

Next:

- Enter notes if necessary
- Confirm or add another line item

Select Quick Repair

Line Item	Hrs	\$/Hr	Unit Cost	Qty	Total Cost
<div style="border: 1px solid #0070C0; padding: 2px;"> <input type="button" value="Edit"/> <input type="button" value="Remove"/> </div> <b>LABOR : Semi-Synthetic Lube Oil Filter</b>	0.10	\$95.00	\$9.50	1	\$9.50
Service Code: Preventative Maintenance > Semi-Synthetic Lube Oil Filter Correction: Service or Charge Cause: Preventative Maintenance Authorization Status: Awaiting Approval					
<div style="border: 1px solid #0070C0; padding: 2px;"> <input type="button" value="Edit"/> <input type="button" value="Remove"/> </div> <b>PART : Semi-Synthetic Lube Oil Filter</b>			\$39.99	1	\$39.99
Service Code: Preventative Maintenance > Semi-Synthetic Lube Oil Filter Part Name: Semi-Synthetic Lube Oil Filter Part Code: <input type="text"/> Manufacturer: <input type="text"/> Cause: Preventative Maintenance Authorization Status: Awaiting Approval					

Ability to:

- Edit price/quantity of line item
- Remove line item

Once estimate is complete and subtotal is confirmed:

- Submit for Authorization

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SubTotal (exc. Tax)	\$49.49
Electronic Payment Fee	(\$0.99)
<b>Payable Amount (exc. Tax)</b>	<b>\$48.50</b>



## Submit For Authorization

**Estimated Completion**

Estimated Completion Date \*

Estimated Completion Time

\* Note: estimated date/time is subject to prompt authorization from the fleet provider

**Tax**

Total Before Tax \$49.49

Tax

Total After Tax \$52.95

- Enter Estimated Completion Time and Date

- Enter Sales Tax

If tax exempt, this field will be locked down and you will not be able to add tax

- Confirm Total After Tax is correct

- Submit for Authorization

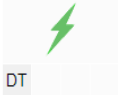
## Repair Order Details

Use this page to add/view line items on a repair order



Repair Order ID: 6004439 Authorization Number: 6004439A4160

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

DT

Vehicle Details	RO Details	FMC Details	Shop Details	Client Details	AME Details	Defect History
<b>FMC Unit Id</b> 2009EV	<b>VIN Number</b> XXXXXXXXXXXXXXXXXX	<b>Driver Name</b>	<b>Model Year</b> 2000	<b>Make</b> Ford		
<b>Model</b> F-150 - F17	<b>Color</b> Unknown	<b>License Plate</b>	<b>Contract Type</b> Maintenance Management (MMX)	<b>Transmission</b> Automatic		
<b>Fuel Type</b> Unknown	<b>Odometer Reading</b> 12345	<b>Engine Idle Hours</b> Not Entered	<b>Vehicle Status</b> Active			

- When the estimate has been approved, you will receive notification through the Repair Order Manager (ROM)

- If approved, the header will be green and will indicate a status of "Approved"

- If estimate has been rejected or needs revisions, the header will be red and will indicate a status of "Required Attention"

PM Repair/Service Tires Fees Damage Select Quick Repair

Line Item	Hrs	\$/Hr	Unit Cost	Qty	Total Cost
<b>LABOR : Semi-Synthetic Lube Oil Filter</b>					
Service Code: Preventative Maintenance - Semi-Synthetic Lube Oil Filter	0.10	\$95.00	\$9.50	1	\$9.50
Correction: Service or Charge					
Cause: Preventative Maintenance					
Authorization Status: <b>Approved</b>					
<b>PART : Semi-Synthetic Lube Oil Filter</b>					
Service Code: Preventative Maintenance > Semi-Synthetic Lube Oil Filter			\$39.99	1	\$39.99
Part Name: Semi-Synthetic Lube Oil Filter					
Part Code:					
Manufacturer:					
Cause: Preventative Maintenance					
Authorization Status: <b>Approved</b>					

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)	\$49.49
Tax	\$3.46
<b>Total (inc. Tax)</b>	<b>\$52.95</b>
Electronic Payment Fee	(\$1.96)
<b>Payable Amount (inc. Tax)</b>	<b>\$51.89</b>

Return to ROM

Work Completed Cancel Repair Order

- If additional items need added or modified, you still have the ability to make updates
- Once ALL REPAIRS ARE COMPLETED and the unit is ready to leave, click "Work Completed" button

- Confirm start time/date
- Confirm completed time/date

### Repair Order Completion

**Work Dates**

Work Start Date: 10/14/2016 Work Completed Date: 10/14/2016

Work Start Time: 10:00 AM Work Completed Time: 05:00 PM

**Tax & Shop Invoice Number**

Total Before Tax: \$49.49 Invoice Number: 1123455

Tax: 3.46

Total After Tax: \$52.95

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?

Save Cancel

- Confirm sales tax
  - Confirm invoice number
  - Save
- \*\*Once the order is saved, you will not be able to make any changes. You will receive payment in 24-48 hours.