Technical Product Guide
for 1link Service Network

Australian v1.0

CONTENTS

1link Service Network is a constantly evolving platform. Development of the platform is ongoing and improvements are made regularly. Therefore if any of the information in this document appears to be incorrect or no longer valid, please feel free to contact 1link Product Support for the latest version or further clarification.

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1 OVERVIEW OF 1LINK SERVICE NETWORK

1link Service Network is a browser based solution that links purchasers of vehicle maintenance and repair products and services (known as Scheme Operators) with suppliers of such services (described hereafter as Repair Outlets). It enables the definition of selective supplier networks along with the ability for a Scheme Operator to select a network repairer, book a service on-line, receive a cost estimate and authorisation request, authorise on-line via a rules based authority engine and then receive an electronic invoice for payment. Further, there is the ability for Scheme Operators to generate jobsheets and process electronic invoices on behalf of repairers who are not 1link Service Network subscribers.

Access to 1link Service Network is provided from the public internet at www.1link.com.au

Scheme Operators provide data which 1link Service Network uses in the provision of the service. Some data is entered on-line by Scheme Operator users, and some data is submitted by the use of data files. This data includes the vehicle file (which describes the Scheme Operator's assets), the supplier network (defining trading terms) and data relating to the application of any authorisation rules.

Key features of 1link Service Network include:

Network Definition
Repair Outlets using 1link can be viewed in the supplier directory. This directory entry highlights approved franchises and independent Repair Outlets and displays the opening hours and services provided by the site.

Scheme Operators can choose whether they want to trade with all suppliers in the 1link directory or whether they want to define their own network at Scheme Operator level or whether they want to define specific networks for one or more schemes that they have set up.

Future Work Booking
1link Service Network offers the Scheme Operator the ability to book service and repair visits to their supplier network on-line. Such future work bookings can be entered either by the Repair Outlet or by the Scheme Operator. Booking confirmations to the driver can be automated and delivered by e-mail, telephone or SMS message. The status of the booking request is visible at all times to both the Repair Outlet and the Scheme Operator via the mailbox and sufficient flexibility is provided such that bookings can be re-scheduled by either the Repair Outlet or Scheme Operator without re-keying of detail. Future Work Bookings are created from the 'Create Jobsheet/Booking' option from the main menu.

Mailbox
The mailbox in 1link Service Network is the hub of all activity. All users of the system have their own mailbox. All relevant incoming messages (e.g. a Future Work Booking request or an authorisation request) appear firstly in the inbox. Other areas of the mailbox include work bookings (a view of future bookings), jobs in progress (shows all current activity); authorisations pending (requests for authorisation that have not yet been actioned by the Scheme Operator) and transactions for payment (submitted electronic invoices). A number of views of data in the various mailbox areas are supported, and simple icons provide a visual legend.

Jobsheet Creation and Authorisation
Jobsheets can be generated by Repair Outlets as a logical follow-on action to a Future Work Booking. Alternatively the create jobsheet option allows the Repair Outlet to generate a jobsheet on a "walk-in job" basis. The system will validate ownership of the vehicle at the outset. Various work types are supported by the system. These are: services; mechanical repairs; Mandatory Inspection; tyres; investigation/other. Different aspects of system functionality apply to each. For example, entry of an Inspection certificate number is mandatory for a Mandatory Inspection. Labour times are automatically validated by the system (using supplied data), as are agreed labour rates, parts discounts and fluid rates which are validated against Scheme Operator provided data.

The system makes use of warning messages, whereby the Repair Outlet is warned prior to the point of requesting authorisation for work, if the system thinks that some specific characteristics of the jobsheet will cause the work to be referred to the Scheme Operator for manual approval. The Repair Outlet is then given the opportunity to address these warnings such as to avoid referrals.

Rules
At the point of authorisation request jobsheets are processed through a rules engine. The rules engine uses Scheme Operator provided data to determine under what circumstances a jobsheet should be referred to a maintenance controller for manual review. The data utilised by the rules engine is entered online by the Scheme Operator.

Referral Management
Jobsheets which cannot be automatically authorised by the system are referred to the Scheme Operator for manual review and approval. This saves valuable time both for the Repair Outlet and the Scheme Operator as, even though a jobsheet may fail the rules and is referred, the maintenance controller can see on-line the jobsheet as created by the Repair Outlet and the reasons for referral. The Repair Outlet does not have to telephone the Scheme Operator and the maintenance controller is able to deal quickly with the authorisation request.

Such jobsheets will appear initially in the Scheme Operator user's inbox and also in the authorisations pending section of the mailbox. Scheme Operators are automatically advised of the reasons whereby the system has caused the jobsheet to be referred. Referred jobsheets can be actioned in one of several ways by the Scheme Operator. The Scheme Operator may authorise all or any work items on the jobsheet, place the jobsheet on a "hold" or deferred status, or request further information electronically of the

Repair Outlet prior to authorising or declining authorisation. In any event, the Scheme Operator has full control over the authority process and any rules which may be in place will be superseded by the action of the maintenance controller during the referral process.

Electronic Invoicing

There exists a two staged process to complete an electronic invoice. Repair Outlets firstly declare the job as being complete. Repair Outlets can only complete jobsheets which have been authorised. As such, once a Scheme Operator has manually authorised a jobsheet, the Repair Outlet is unable to make any amendments to it prior to completion, without having to first obtain re-authorisation. The second part of the process is where the Repair Outlet allocates an invoice number and invoice date. The Repair Outlet is also prompted to enter the GST amount taken from their Dealer Management System. Electronic invoices are stored in a separate area of the mailbox, and can be viewed and printed if required. Electronic invoices are delivered to the Scheme Operator daily (either by FTP or by report/export).

Manual Invoice Processing

The Scheme Operator will be provided with the ability to generate electronic jobsheets and subsequent electronic invoices on behalf of repairers with whom they trade, but who do not subscribe to 1link Service Network. To facilitate this, the Scheme Operator will be expected to provide data, by way of data files, relating to these non-subscribing repairers. This data relates specifically to agreed trading terms such as labour rate and parts discount which the system can then use in the jobsheet validation process. Jobsheets that are created in this way are then completed and processed as electronic invoices once the "paper" invoice is received from the repairer and validated by the Scheme Operator against the electronically held version of the jobsheet.

Vehicle History

Vehicle history is built by 1link Service Network, and can be supplemented by data provided by the Scheme Operator. At any time during the referral process vehicle history can be viewed by Scheme Operator users. Vehicle history is not visible to Repair Outlets except where the relevant jobsheets were created by that Repair Outlet (or by another Repair Outlet in the same Group).

Reports

A number of standard reports are made visible to both Scheme Operators and Repair Outlets. All of these reports are accessible and visible on-line and a number of them support downloading of data in a CSV format file such that the user can load this data into a spreadsheet for subsequent analysis and manipulation.

Accounting

A separate web-site is provided to the Repair Outlet Account user. This site allows nominated users to access and manage charges associated with the use of 1link Service Network. Payments are made via a direct debit mechanism where a pre-payment account allows Repair Outlet Account users to maintain a "bank" of funds that is debited each time a transaction is processed.

Access and Security

Access to 1link Service Network is controlled by a username/password combination. A user may be nominated as a system manager. System managers, amongst other things, have the ability to create other users for the relevant Scheme Operator/Repair Outlet. New users, when created by a system manager, are assigned "permissions". Permissions control the functions that the individual users can perform, e.g. a Repair Outlet user can be given permission to access tariff management.
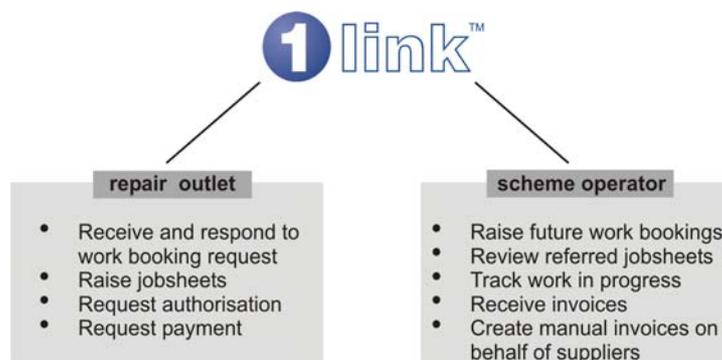
2   JOINING PROCESS

The mechanism whereby Repair Outlets and Scheme Operators join 1link Service Network involves a coordinated set of actions involving 1link Product Support, and 1link Accounts. Once a registration form has been received, 1link Product Support will coordinate all of these actions and issue starter packs, including guides and login details as soon as all steps have been completed.

3   REPAIR OUTLET

This section describes the functionality that is available to Repair Outlets.

Using 1link, a Repair Outlet is able to receive on-line Future Work Booking requests, create jobsheets, request authorisation and raise an electronic invoice once work is completed.

In requesting authorisation the jobsheet may be referred to the Scheme Operator and this will alleviate the need for the Repair Outlet to telephone the fleet as the maintenance controller can see the jobsheet on-line and respond accordingly.

Sites using 1link can be viewed in the supplier directory. The directory entry highlights any approved franchises and shows the services offered by the site and the opening hours. Repair Outlets should make sure that their directory entries are maintained and updated regularly as 1link will use this information when, for example, a Scheme Operator is searching for a supplier to fulfil a Future Work Booking.

Sites are able to set up and manage their pricing tariffs and have access to a number of standard reports.

The functionality that is available to a Repair Outlet user will be wholly dependant on how they are configured to use the system (primarily by the setting of permissions). The user will logon to the 1link service, www.1link.com.au, using the logon name and password that has been allocated to them and the home page will display the functionality available. The HOME page displayed below is for a user who has access to all the available functionality.
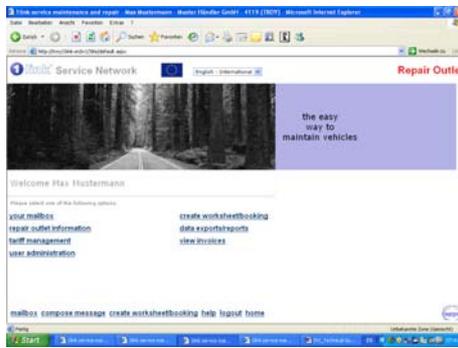
The sections below describe in detail each of the elements of functionality.

3.1   Mailbox

The mailbox is the heart of the 1link system and allows Repair Outlets to track jobsheets throughout the system, whatever their status. It shows incoming messages, including Future Work Booking requests and work authorisations, jobsheets which have been referred to the Scheme Operator for authorisation and jobsheets which have been completed and payment requested. The mailbox is accessed from the 1link home page. To view an individual message within the mailbox select the icon on the left hand side of the line.

Search options at the top of the screen allow configuration of the view of the different areas of the mailbox. So, for example, messages are displayed if they fall within the time band specified (today, within 2 days, within 7 days, within 2 weeks, any date) and messages are ordered in the way specified (such as ascending date, descending date, message type). There is also a filter at the top of the screen to search for a specific message, for example by entering a registration number or jobsheet number.

An icon is shown against each message which gives an indicator of the status of the message. Initially, when a message first arrives in the Inbox, this status is denoted by a green '!' (to do), after 20 minutes the status moves to a yellow '!!' (priority to do), and after another 20 minutes the status becomes a red '!!!' (urgent to do). A dark blue 'i' indicates a general query, a pale blue spanner indicates a jobsheet, and a dark grey hourglass symbol indicates a deferred jobsheet.

Each message is date and time stamped, and shows who the message was sent to or from and the type of message.

There is a permanent display at the top of the mailbox screen which shows the value of jobsheets on the system, for that site, which have not yet been invoiced. This relates to those transactions where work has started but not yet been invoiced (note - this is slightly different to the 'un-invoiced transaction report' which show transactions where the work has been completed but not yet invoiced). This un-invoiced figure is calculated once each day at the close of business.
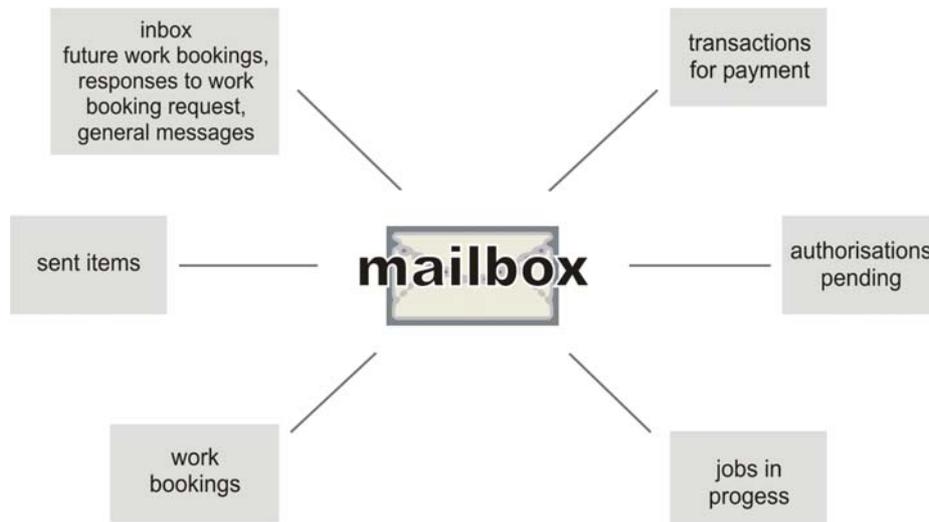
The mailbox is separated into discrete areas which can be accessed from the icons on the top right of the screen. These are as follows:

1.   **Incoming Messages**

New messages coming into the Repair Outlet will arrive in the 'incoming messages' area of the mailbox and will remain there until the message is opened. Typically these messages will relate to:
   a.   Future Work Booking requests – requests for future dated work bookings
   b.   Accepted bookings – confirmed bookings for future dated work
   c.   Alternative date accepted – requests for future dated work where the Scheme Operator has accepted the alternative dates offered by the Repair Outlet
   d.   Alternative date declined – requests for future dated work where the Scheme Operator has declined the alternative date offered by the Repair Outlet.
   e.   Cancelled work bookings – cancellation of future dated work by the Scheme Operator
   f.   Jobsheets submitted for authorisation which have been approved by the Scheme Operator
   g.   Jobsheets submitted for authorisation which have been part approved by the Scheme Operator
   h.   Jobsheets submitted for authorisation where the Scheme Operator has requested further information
   i.   Jobsheets submitted for authorisation which have been deferred (i.e. put on hold) by the Scheme Operator
   j.   Jobsheets submitted for authorisation which have been declined by the Scheme Operator

k.   General messages which could originate from a Scheme Operator, 1link product support or the Repair Outlet group

2.   Sent Items

This contains messages which have been sent out by the Repair Outlet using the 'compose message' facility. These may include messages to Scheme Operators, 1link product support or a group user. Messages will stay in the 'sent area' of the mailbox until deleted by the Repair Outlet.

3.   Work Bookings

This gives a view of all Future Work Bookings for the site, regardless of status. So the booking could be:
a.   Booking request – incoming request from Scheme Operator which has not yet been actioned
b.   Offer made – awaiting acceptance of alternative date offered by Repair Outlet to Scheme Operator
c.   Booking confirmed – future work booking request which has been accepted by the site and confirmed by the Scheme Operator
d.   Cancelled bookings – these will be removed after seven days.

4.   Jobs in Progress

This gives a view of all jobsheets for the site where payment has not yet been requested. These jobsheets may be:
a.   Awaiting start - no work has yet been entered onto the jobsheet
b.   In progress - work has been entered onto the jobsheet, but authority has not yet been requested
c.   Vehicle arrived – vehicle has been checked in at the Repair Outlet
d.   Authority requested - work has been entered onto the jobsheet and authorisation to do the work requested
e.   Authority approved - the Scheme Operator has given authority for the work to be done
f.   Information requested - authority to do the work has been requested and the Scheme Operator has requested further information from the Repair Outlet before making a decision
g.   Authority declined - the Scheme Operator has declined the request to do the work
h.   Authority deferred – the Scheme Operator has put the authorisation request 'on hold' until a decision can be made.

5.   Authorisations Pending

These are jobsheets where authorisation has been requested but an answer has not yet been received. The screen display shows the elapsed time for each job since authority was requested.

6.   Transactions for Payment

This area of the mailbox contains 'finalised' transactions. So it shows not only those transactions where payment has been requested but also cancelled jobsheets. Jobsheets will remain here until 30 days after the payment date.

3.2 User Administration

This area of the system can only be accessed by a Repair Outlet user who is set up as a System Manager.

User administration allows the Repair Outlet system manager to set up new Repair Outlet users and to control the way in which they can use the system (i.e. what functionality they can have access to). This functionality is also available to the Repair Outlet Account and Repair Outlet Group users.

In adding a new user the following information needs to be set:

1. **User name**

2. **System manager**
   If the user is set up as a system manager they will have access to user administration (which allows the set up and configuration of other users) and to Repair Outlet information (which allows the amendment of site details as they appear in the supplier directory) and could be given access to a wider range of permissions than a normal user.

3. **User status**
   Set to 'active' or 'suspended'. If set to suspended the user will not be able to access the system.

4. **Job title**

5. **E-mail address**

6. **Login name**
   This will be automatically generated by the system and cannot be changed.

7. **Password**
   This can be set and subsequently changed by the system manager.

8. **Permissions**
   The table below shows a list of the permissions that can be set for each Repair Outlet user.

Permission	Effect
Your mailbox	Enables access to the mailbox
Create jobsheet/booking	Enables access to create a job sheet
Data exports/reports	Enables access to run data exports and reports
Tariff management	Enables access to view and update pricing tariffs
View invoices	Enables access to view invoices
Compose message	Enables functionality to compose message
Vehicle check in	'Vehicle arrived' message is given when the vehicle is checked in
Jobsheet request authority	Enables user to request authorisation on a jobsheet
Jobsheet completion	Enables access to complete a jobsheet
Jobsheet request payment	Enables user to request payment on a completed jobsheet
Job sheet issue a credit	Enables access to raise a credit note
Booking administration	Enables access to view and progress work bookings
Job sheet administration	Enables access to view and progress jobsheets
View all messages	Enables access to all team messages as well as individual user messages

3.3   Repair Outlet Information

This area of the system can only be viewed and updated by a Repair Outlet user who is set up as a system manager. The details set up against a Repair Outlet are displayed in the supplier directory and can therefore be viewed by 1link customers.

The service information is as follows:

1. **Repair Outlet name and site ID**

2. **Account Name & Contact**

3. **Group member code**
   This cannot be updated by the Repair Outlet; it is set up by 1link product support. If the site is part of a group then the group code will be shown here. If a site is not correctly assigned to a group this will mean that the site will not be visible from the group view and any tariffs set by the group will not take effect for this site.

4. **Main contact**

5. **Telephone number**

6. **Fax number**

7. **Future Work Booking fax number**
   This is the number used for any reminders sent in respect of Future Work Bookings. The number can only be changed by 1link product support.

8. **Your Address & Postcode**

9. **Notification e-mail**
   A site can choose to receive a general e-mail when a new Future Work Booking or general message arrives in the 1link mailbox (this would only apply to sites that do not make frequent use of 1link). The e-mail address to which the notification is to be sent should be entered here.

10. **Site type**
    The site can indicate whether they are a fixed or mobile site. This is one of the search parameters that a Scheme Operator may use when searching for a site to select for a Future Work Booking.

11. **Vehicle Coverage** Identifies whether the site undertakes work on cars and/or Light Commercial Vehicles (LCV's).

12. **Repair types offered**
    These are the repair types offered by the site – service and repair, Mandatory Inspection, tyres and glass. This is one of the search parameters that a Scheme Operator may use when searching for a site to select for a Future Work Booking.

13. **Additional Services**
    The site can set up any additional services that they offer specifically, Loan car and collection and delivery. This is one of the search parameters that a Scheme Operator may use when searching for a site to select for a Future Work Booking. Alongside each additional service the site can enter any booking instructions which will be displayed to system users when they select this additional service.

14. **Delivery collection distance**
    The delivery collection distance set by the site shows the radius within which they offer a delivery and collection service. This is one of the parameters that a Scheme Operator may use when searching for a site to select for a Future Work Booking.

15. **Booking lead time**
    This shows the booking lead time set by the site. Providing a future dated booking is equal to or greater than the lead time specified it can be automatically accepted without reference to the site. If this field is blank it will default to 7 days. Booking acceptance lead times can also be set in respect of the differing services offered by the Repair Outlet, for example delivery and collection or use of a Loan Car.   These times are set in '*tariff management'.*

    Note: even if the site has set a booking lead time for automatic acceptance, a Scheme Operator has the ability to decide whether they want this facility turned on or off (by setting the 'automatic Future Work Booking acceptance' in '*scheme details'*). So if the Scheme Operator does not want automatic booking acceptance a booking request will always be sent to a Repair Outlet for confirmation that they can do the work.

16. **Opening hours and holidays**
    This will show the normal opening hours and holidays as set up by the site. The opening hours will be used when a Future Work Booking request is being raised. If the request is for a date/time when the site is not open then 1link will ask the user to enter another date/time.

17. **Manufacturers**
    The franchises for which membership has been bought or applied for are listed along with the status of each application.

    Adding a new franchise to a site can only be done by an authorised user such as the Repair Outlet Account (see '*Repair Outlet Account - Repair Outlets'*) or by product support.

When a modification is made to Repair Outlet details the date/time and name of the user is logged and displayed at the bottom of the screen. Changes take effect immediately the record is saved.

At the bottom of the service details screen there is a link to view the entry as it will appear in the 1link directory.

3.4   Tariff Management

This area of the system can only be viewed and updated by a Repair Outlet user who has the 'tariff management' permission set. Tariff management allows the user to set up a pricing tariff for the site and assign this against a specific Scheme Operator. Tariffs can also be set up at the Repair Outlet group level (see *'Repair Outlet group view'*).

1.   **Setting up a pricing tariff**

Access 'tariff records' from the tariff management menu and select 'add a new tariff'.

The following information must be entered:

a.   **Tariff name**
The name used will later appear in a drop down list for selection in assigning the tariff to a Scheme Operator.

b.   **Effective from date**
This field should be left blank for the tariff to take effect immediately. Alternatively enter a future date from which the tariff should become active.

c.   **Automatic booking acceptance**
The Repair Outlet can configure the system so that any future dated work booking requests are automatically accepted provided that the requested date is equal to or later than the lead time specified. Different lead times can be set for bookings with delivery to Repair Outlet, bookings where collection and delivery is required, and bookings where a Loan Car is required.

Note: A general default parameter for a booking lead time is also set in *'Repair Outlet information'.*

d.   **Inclusive services**
Enter here any additional services that may have been negotiated with the Scheme Operator (for example, 'wash and vac').

e.   **Parts and labour pricing**
A labour rate and parts discount can be set up for each franchise related to the Repair Outlet site. When creating a jobsheet, these prices will be populated onto the jobsheet (but note – if the rates provided by the Scheme Operator differ from those set by the Repair Outlet then the Scheme Operator rates will be populated on the jobsheet along with a message to the user to check the rates).

f.   **Fluid pricing**
Enter fluid prices by selecting the relevant fluid from the drop down list; enter a make/description, and a price per litre.
Note - the initial tariff record must be saved first then re-accessed in order to add fluid prices.

g.   **Mandatory Inspection prices**
The Mandatory Inspection categories are displayed along with the standard price (these categories and prices are set up by 1link product support). The Repair Outlet can choose to leave the standard price in place or overwrite this with their own price.

2.   **Assigning a tariff to a customer**

Once a tariff has been set up it can be assigned to a customer. Select 'Assigning a Tariff' from the tariff management menu.

a.   **Standard tariff**
The Repair Outlet can assign created tariffs to be the 'standard' fleet and retail tariffs. This means that, unless a customer has a specific tariff assigned to them, the default 'standard' tariff will be used.

b.   **Customer tariff**
Either leave the customer pointing to the 'standard' tariff or assign a created tariff by selecting the tariff name from the drop down list.

3.5   Create Jobsheet/Booking

```
Enter vehicle          scheme name displayed +      Select vehicle to
registration           message if outstanding       continue
                       txns for this vehicle
       │                        ↑                           │
       ▼                        │                           ▼
Vehicle found on                                     Warning & information
database?          ──── Yes ────┘                    messages displayed
       │                                                    │
      No                                                    ▼
       │                                             Vehicle details
       ▼                                             displayed
Does fleet allow                                            │
worksheets for     ─ Yes ▶  Enter vehicle                   ▼
non database                description               Enter odometer
vehicles?                                              reading
       │                                                    │
      No                                                    ▼
       │            Go to SECTION 3.6  ◀─ Yes ─  Is this a future
       ▼            Future Work Booking            work booklng
Unable to create                                            │
worksheet                                                  No
                                                            │
                                                            ▼
                    Select site      ◀─ Yes ─  Is this a group
                         │                      user?
                         │                          │
                         │                         No
                         │                          │
                         └──────────────▶  Enter job details  ◀───┐
                                                    │             │
                                                    ▼             │
                                           All work entered on ─ No
                                           jobsheet?
                                                    │
                                                   Yes
                                                    │
                                                    ▼
                                           Request
                                           authorisation
```

This area of the system can only be viewed and updated by a Repair Outlet user who has the 'create job sheet' permission set. The site is able to create a Future Work Booking or a jobsheet and submit it to the Scheme Operator for authorisation.

3.5.1   Vehicle Search

The first step in creating a jobsheet/booking is to enter the registration number of the vehicle. 1link will search the database and display the customer name, scheme name and vehicle description.

The system will highlight if there are **outstanding transactions** already raised by the site for this vehicle. Where a Future Work Booking already exists for the vehicle for today then the Repair Outlet will be directed to the existing Future Work Booking. If there are other outstanding transactions the site should check their mailbox using the transaction number shown to make sure that a duplicate jobsheet is not being raised. The site can choose to proceed and raise a new jobsheet but 1link will ask the site to confirm that they want to do this.

If the vehicle belongs to a customer whom the Repair Outlet has set to **'suspended'** then the Repair Outlet will not be able to create a jobsheet.

For more information on setting customer status see '*Repair Outlet Account – account information*'.

When a Repair Outlet that is part of a managed network creates a jobsheet for a Scheme Operator who use a network management company then they will be presented with the following message:

> *"This vehicle is operated by [scheme operator]. You should note that there are commissions and tariffs relevant to this transaction as per your agreement with [network manager] that will be debited from your pre payment account as per your agreement".*

Once the Repair Outlet has noted any of the above warnings they will need to click on the Registration Number to proceed.

3.5.2   Vehicle Details

1link will then display any standard instructions and special booking instructions that have been set up by the Scheme Operator. Vehicle details (as provided by the Scheme Operator) are displayed which include the make/model, date of first registration, chassis/VIN number, warranty end date and distance, and vehicle colour.

The Repair Outlet can amend the vehicle colour and enter the driver name. The odometer reading must be entered as this is a mandatory field. If the odometer reading entered is less than the last recorded mileage on 1link a warning message will appear. Similarly a warning message will also be given if the odometer reading is greater than the tolerance specified by the Scheme Operator. Both of these warnings can be ignored if the Repair Outlet is convinced that the odometer reading they are entering is correct.

The user then selects one of the following options:

- The booking is for a future date - this then invokes the 'Create Future Work Booking Journey'. GO TO SECTION 3.6 (for booking initiated by the Repair Outlet) and SECTION 3.7 (for booking initiated by the Scheme Operator).

- The vehicle is on site – this then invokes the 'Create Jobsheet journey' GO TO SECTION 3.8.

3.6 Creating a Future Work Booking - Booking Initiated by Repair Outlet

The 1link Future Work Booking functionality allows a future work booking to be made by a Repair Outlet. The future work booking may be made by the Repair Outlet group who would direct the work booking to a Repair Outlet site. Future work bookings can only be made by Repair Outlet users who have the 'create job sheet/booking' permission set.

3.6.1 Process Overview

The first step in the process is for Repair Outlet to input the contact details (Contact Name, Telephone & Mobile number). The user then captures details of how the booking confirmation is to be made e.g. SMS or E-mail followed by details of the work, additional services required and the preferred booking date/time.

If the booking is being made by the group then a Repair Outlet site needs to be selected.

The booking details entered are displayed and the Repair Outlet can choose to change the details or confirm the booking. When the booking details are confirmed a booking confirmation number is displayed and the details become visible to the Scheme Operator in their mailbox.

Once a future work booking has been made the Repair Outlet can subsequently take further action of:
- check the vehicle in when it arrives for the work to be done
- record a 'no show'
- cancel the booking
- amend the booking
- reschedule the booking

In any of these cases the Scheme Operator is notified of the action taken.

The Repair Outlet can obtain a summary of future work bookings by using the 'Future Work Bookings report' which can be found in '*data exports/reports'.*

Scheme Operator	Repair Outlet

```
                    ┌──────────────────┐
                    │ Enter vehicle    │
                    │ registration     │
                    └────────┬─────────┘
                             ↓
                    ┌──────────────────┐ ←───────────┐
                    │ Enter work       │             │
                    │ required and     │             │
                    │ booking date     │             │
                    └────────┬─────────┘             │
                             ↓                       │
                    ┌──────────────────┐ ←──────┐    │
                    │ Select site      │        │    │
                    │ (if booking      │        │    │
                    │ being made       │        │    │
                    │ by group)        │        │    │
                    └────────┬─────────┘        │    │
                             ↓                  │    │
                       ◇ Confirm ◇     No   ┌────────────┐
                       ◇ booking  ◇ ──────→ │  Change    │
                       ◇ details? ◇         │  details   │
                             │              └────────────┘
                            Yes
                             ↓
   ┌──────────────┐   ┌──────────────┐
   │ Notification │ ← │  Confirmed   │
   │ of booking   │   │  booking     │
   └──────────────┘   └──────────────┘
```
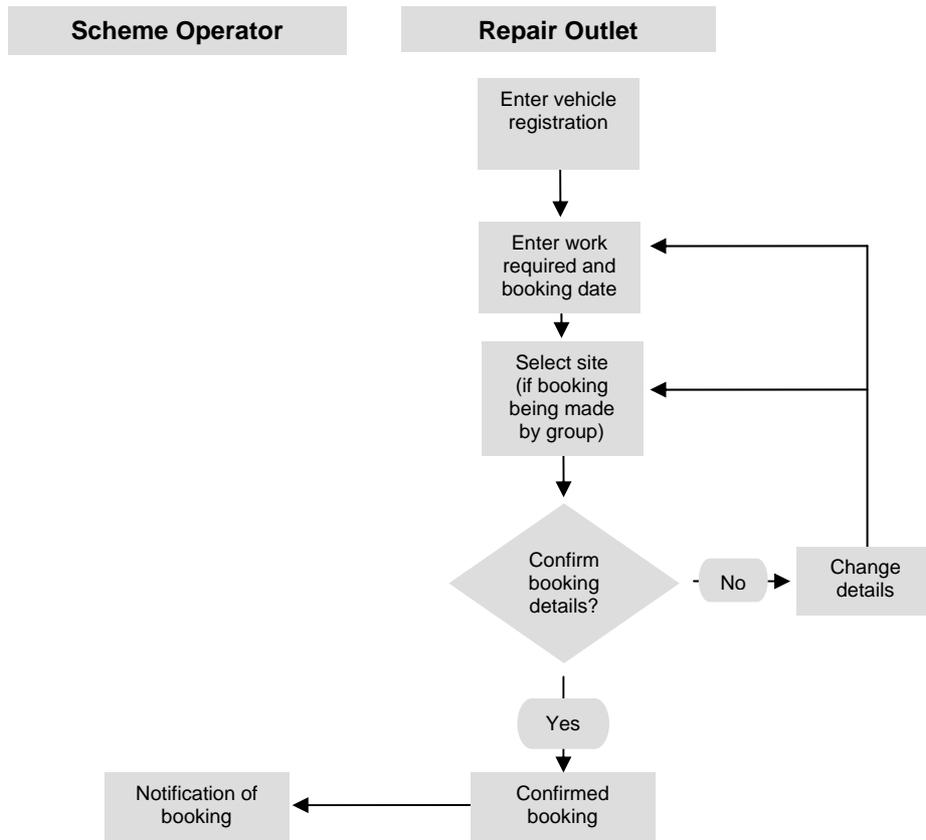
3.6.2   Set Up

The following steps need to be taken to enable a Repair Outlet (or Repair Outlet group) to make future work bookings.

1.   Within '*Repair Outlet information'* the Repair Outlet will need to set site details which will be used in those instances where a future work booking is being made by the Group and they are searching for a Repair Outlet to fulfil the request:

    a.   **Address and postcode**
    Make sure that the postcode entered is correct, preferably by using the postcode lookup functionality (the post-code look-up facility is part of country customisation of 1link Service Network).

    b.   **Site type**
    Indicate whether this is a fixed or mobile site.

    c.   **Repair types offered**
    Indicate the types of work offered by this Repair Outlet (service and repair, Mandatory Inspection, tyres).

    d.   **Additional services**
    Indicate the additional services offered by this Repair Outlet (Loan Car, delivery and collection).

    e.   **Delivery collection distance**
    Indicate the distance the Repair Outlet is prepared to travel in order to provide a delivery and collection service.

2.   Within '*user administration'* the Repair Outlet must set the appropriate permissions to enable users to make future work bookings. The relevant permissions are:

    a.   **Create jobsheet/booking**

    b.   **Booking administration** (allows the user to track work bookings within the mailbox and confirm bookings)

3.6.3   Detailed Functionality

1.   Creating a Future Work Booking

To make a future work booking the Repair Outlet should select '*create jobsheet/ booking*' from the HOME page.

    a.   **Vehicle details**
      As previously described

    b.   **Contact details**
      As previously described

    c.   **Booking confirmation Details**
      Enter preferred method of booking confirmation (Telephone, Fax, E-mail or Not required).

      Note: That additional confirmation by SMS can also be selected.

    d.   **Work details**
      i.   Enter a summary of the work required: Service (selecting the type needed from the drop down list), Mandatory Inspection, tyre work, or investigation/repair (free format text of work required). At this point this is not a detailed description of the repairs – only an indication of the work required. When the vehicle is checked in the Repair Outlet will need to enter exact details and seek authorisation.
      ii.   Additional notes can be entered if needed.

    e.   **Arrangements**
      i.   Specify delivery drop off/collection details.
      ii.   Specify whether a Loan Car is required.
      iii.   Enter the booking date/time.

    f.   **Supplier directory search** (by group only)
    If the future work booking is being made by the Repair Outlet group then a specific site within the group needs to be selected. A general supplier search can be made by entering criteria such as manufacturer (this defaults to vehicle manufacturer but the group can choose franchised or non franchised suppliers), the supplier name, type of supplier (fixed site or mobile), type of work (service, Mandatory Inspection etc) and any additional services needed (for example; Loan Car, delivery and collection). The group can also select how the search results should be returned, by including all suppliers or only those nominated as preferred or secondary and within a nominated distance of the postcode. (Subject to country implementation of postcode data).

    1link will return a list of up to 25 suppliers which match the search criteria entered. The display will show supplier name, address, telephone number, fax number, the services offered by that supplier, franchise, labour rate, parts discount, the next available booking date, the next date from which bookings can be automatically accepted,

distance from the stipulated postcode (Subject to country implementation of postcode data)., the preference allocated to the supplier by the Scheme Operator and opening hours.

g. **Booking details**
The booking details entered will be displayed and the Repair Outlet can choose to change the details or confirm the booking.

A booking confirmation number (which is the jobsheet number) is displayed and the booking is visible to the Scheme Operator from their mailbox.

2. Taking action on a confirmed booking

At any point following the booking the Repair Outlet is able to:
- check the vehicle in when it arrives for the work to be done. The ability to 'check in' a vehicle will only be given on the day the vehicle is due to be booked in. When 'checking in', the booking the details will be displayed showing a summary of the work required and the Repair Outlet will be required to enter the odometer reading (the reading entered at the time of making the booking will not be carried forward). Once 'check in' has been confirmed the jobsheet will be accessible from the 'jobs in progress' area of the mailbox with a status of 'awaiting start'. For guidance on creating the jobsheet see '*create jobsheet/booking'*.
- reschedule the booking
- record a 'no show'. The ability to record a 'no show' will only be given on the day the vehicle is due to be booked in.
- amend the booking
- cancel the booking

3. Viewing work bookings

Work bookings can be viewed at any time by the Repair Outlet from the 'work bookings' section of the mailbox. A summary of Future Work Bookings is available in *'data exports/reports'*

3.7 Future Work Booking Requests - Booking Initiated by Scheme Operator

The 1link Future Work Booking functionality allows a future work booking to be directed to a Repair Outlet. The booking request can originate from the Scheme Operator, the Repair Outlet group or from a call centre set up specifically to deal with Future Work Bookings. This process describes from the Repair Outlet perspective, Future Work Booking requests that are initiated by a Scheme Operator, Call Centre etc.

3.7.1 Process overview

Booking requests to a Repair Outlet appear in the incoming messages mailbox. Symbols against the booking request indicate if a Loan Car is required or if collection and delivery are required.

If the requested date is within the time parameters pre-set by the Repair Outlet then the booking will be automatically accepted (unless the Scheme Operator wants to always have booking requests forwarded to the Repair Outlet; in other words they have turned off the automatic acceptance facility). Otherwise the Repair Outlet has to respond to the booking request by accepting one of the requested dates, offering an alternative date, or declining the booking.

If the Repair Outlet accepts the requested date, or offers an alternative date offer which is accepted by the Scheme Operator, then the Scheme Operator will confirm the booking to the driver (the Scheme Operator can decide whether they or the Repair Outlet need to confirm the booking to the driver).

Note - a confirmed booking is NOT an authority to do the work. An authorisation request must be made when the vehicle is checked in.

Confirmed bookings can be accessed from the work bookings area of the mailbox. Further action taken by the Repair Outlet on a confirmed booking can be:

- Check in the vehicle when it arrives for work to be done. The ability to 'check in' a vehicle will only be given on the day the vehicle is due to be booked in. When 'checking in', the booking the details will be displayed showing a summary of the work required and the Repair Outlet will be required to enter the odometer reading (the reading entered at the time of making the booking will not be carried forward). Once 'check in' has been confirmed the jobsheet will be accessible from the 'jobs in progress' area of the mailbox with a status of 'awaiting start'. For guidance on creating the jobsheet see '*create jobsheet/booking'*.

- Reschedule the booking.

- Record a 'no-show' (this button will not be visible on the jobsheet until the day the vehicle is due to be booked in).

- Amend the booking.

- Cancel the booking. Cancelled bookings will be removed from the mailbox after 7 days.

The Repair Outlet can obtain a summary of Future Work Bookings by using the 'Future Work Bookings Report' accessed from '*data exports/reports'.*

3.7.2 Set Up

The following steps need to be taken to enable a Repair Outlet to start receiving booking requests.

1. Within '*Repair Outlet information'* the Repair Outlet will need to set the following details:

    a. **Address and postcode**
    Make sure that the address and postcode entered are correct. 1link will use the address when the person making the booking is searching for a Repair Outlet to fulfil their request.

    b. **Notification e-mail**
    To receive an e-mail message when a Future Work Booking request arrives in the Repair Outlet mailbox enter the e-mail address to which the notification should be forwarded

    c. **Site type**
    Indicate whether this is a fixed or mobile site. This information will be used by 1link when the person making the booking is searching for a Repair Outlet to fulfil that request.

    d. **Repair types offered**
    Indicate the types of work offered by this Repair Outlet (service and repair, Mandatory Inspection, tyres). This information will be used by 1link when the person making the booking is searching for a Repair Outlet to fulfil that request.

    e. **Additional services**
    Indicate the additional services offered by this Repair Outlet (Loan Car, delivery and collection service). This information will be used by 1link when the person making the booking is searching for a Repair Outlet to fulfil

that request. Booking instructions can also be set against each additional service offered. These instructions will subsequently be displayed to users when they are selecting the additional service.

f. **Delivery collection distance**
Indicate the distance in kilometres the Repair Outlet is prepared to travel in order to provide a delivery and collection service.

g. **Booking lead time**
The number of days specified here will indicate to customers the preferred lead time for the acceptance of bookings. Any booking requests over the specified lead time will automatically be accepted by the system unless the Scheme Operator has chosen not to allow automatically accepted requests. Leaving the booking lead time blank will default to a lead time of 7 days.

Booking acceptance lead times can also be set in respect of the differing services offered by the Repair Outlet, for example delivery and collection or use of a Loan Car. These times are set in '*tariff management'*.

Note: even if the site has set a booking lead time for automatic acceptance, a Scheme Operator has the ability to decide whether they want this facility turned on or off (by setting 'automatic Future Work Booking acceptance' in scheme details). So if the Scheme Operator does not want automatic booking acceptance a booking request will always be sent to a Repair Outlet for confirmation that they can do the work.

h. **Opening hours**
Indicate the opening hours and times of the Repair Outlet, along with any days that the site is closed. This information will be used by 1link when a booking request is being compiled – if the user tries to select a date or time when the site is not open they will be requested to enter another date/time.

2. Within '*user administration'* the Repair Outlet must set the appropriate permission to enable users to action Future Work Booking requests. 'Booking administration' allows the user to track and confirm bookings from the mailbox.

3.8   Creating a Jobsheet - Vehicle on Site

This section details the process of building a jobsheet – see the diagram on the next page. The process includes:

1. Searching for the vehicle on the database
2. Capture of job specific details
3. Selection of a site if the jobsheet is being created by a group user
4. Re-coding of Vehicle (if required)
5. Entering job details; this may be for a service, Mandatory Inspection, tyres, mechanical repair or investigation/'other' work.

1.   Vehicle Search
Refer to SECTION 3.5

2.   Capture of job specific details
The user is prompted to capture the odometer reading, driver name, job reference (from the repair outlets dealer management system, the estimated job completion date and time.

3.   Select site

In the case of a group user then, following the display of vehicle details, the user will be asked to select the site that is carrying out the work.

4.   Re-coding of vehicle

If the system does not recognise the vehicle from the model coding provided by the Scheme Operator then the Repair Outlet will be asked to confirm the vehicle details by selecting the make/model from a drop down list. The revised model coding will appear on the '*recoded vehicle report'* which is available to Scheme Operators, but the vehicle details on the 1link database will not be updated.

5.   Enter job details

At this point a unique transaction number is allocated to the jobsheet by 1link and the status of the job is seen as 'awaiting start'. The Repair Outlet can now build the jobsheet by entering one or more line items to describe the work to be undertaken. Work is broken down into the categories shown below although the categories will only be displayed if the site is set up to carry out that type of work:

   a.   **Service**

Select the required service from the drop down list. There is the flexibility for a Repair Outlet to enter any time or distance based service where the supplied data holds no service schedule data for that particular vehicle, so options are available to enter a manufacturer variable based service, a manufacturer time based service, and a manufacturer distance based service.

The reason for carrying out the work must be selected from the drop down list. For a service this defaults to 'routine'.

The GST rate can be amended if appropriate.

The Repair Outlet must show whether this is a variable priced job, a fixed price job or a warranty claim.

     i.   For a warranty claim the job defaults to zero cost

     ii.   For a variable priced job 1link populates the jobsheet with the standard time for the selected service (where it exists within the supplied data), the actual time taken (which defaults to the standard time), the agreed hourly labour rate and the labour total. The hourly rate displayed will be that set by the fleet (if one has been set) but if the rate differs from that set by the site a message will be displayed advising the site to check that the correct rate is used.

The Repair Outlet can change the actual time taken and the labour rate and also choose to apply a discount and goodwill. In applying a discount and/or goodwill the system will multiply actual hours by the labour rate, deduct the goodwill percentage and then deduct the discount.

Once a labour line has been added the Repair Outlet may want to add parts or fluids against the job.

To add parts the Repair Outlet needs to input quantity, part code, description, unit price, discount and goodwill. The parts discount displayed will be that set by the fleet, although the Repair Outlet can change this. The system calculates the unit cost (unit price with discount and goodwill applied) and the item total (unit cost multiplied by quantity).

To add fluids the Repair Outlet needs to enter quantity, fluid type (selected from a drop down list) and unit cost. The fluid rate displayed will be that set by the fleet but the Repair Outlet can amend this. The system will calculate the total cost of the fluid (unit cost multiplied by quantity).

  iii. For a fixed price job the Repair Outlet should enter the fixed price and may also choose to apply goodwill. The fixed price shown is the price before any goodwill is applied. Details of parts and fluids can be added to the jobsheet but there are no separate prices attached, i.e. these are all shown as zero price.

b. **Mandatory Inspection**

1link will display any Mandatory Inspection instructions that have been set up by the Scheme Operator. The Repair Outlet must select whether a Mandatory Inspection is required, has been passed or failed. The jobsheet will be populated with the price for the appropriate type of Inspection (selected from a drop down list) and will display the price from the pricing tariff set by the Repair Outlet. The GST rate can be amended if required.

  i. Mandatory Inspection required. Enter the type of Mandatory Inspection from the drop down list. Note – following a 'Mandatory Inspection required' request the Repair Outlet will need to amend this to a 'pass' or 'fail' prior to marking the jobsheet as completed and requesting payment.

  ii. Pass. Enter who the certificate was issued by, the certificate number, the Mandatory Inspection type (from the drop down list), the date the certificate was issued and the expiry date.

  iii. Fail. Enter who the certificate was issued by, the certificate number, the Mandatory Inspection type (from the drop down list) and the date the certificate was issued.

c. **Tyres**

Firstly, the Repair Outlet enters the reason for the tyre work being undertaken and the relevant wheel positions involved.

There are three types of tyre work accepted by the system:

New Tyres
The tyre description is selected from the tyre catalogue using the search parameters provided. If a tyre tariff has been setup, see section 5.5, Tyre Catalogue Price Management, then the price displayed will be the price agreed with the Scheme Operator, if no tariff has been established then the list price for the tyre is shown.

e.g. By entering '20555' into the search text field, then all tyres with a tyre width of '205' and a tyre profile of '55' are returned.

The number of wheel positions selected determines the quantity of new tyres fitted.

Tyre Services
A number of pre-defined tyre services are available to the user e.g. Wheel alignment The user selects the services required by ticking the relevant box; the quantity is determined by the wheel positions selected and the price is determined by the tyre tariff. See section 5.5, Tyre Catalogue Price Management.

If no price exists in the tariff then the user is able to enter a price but the jobsheet will subsequently be referred in this instance.

Tread Depths
Tread depths may be captured if specified by the Scheme Operator, and consist of 1 reading against each wheel position. Information recorded includes the existing brands and wheel types (steel or alloy.)

d. **Repair**

When entering details of the repair to be carried out the Repair Outlet can either filter the entire job list by Repair component using the drop down menu e.g. 'Front Brakes' or can enter search text description (e.g. "brakes").

1link will return a list of jobs – displaying standard job times for this model of vehicle. Some jobs may not have times attached and this may either be because the vehicle model is not known or there is no standard time in the database.

Selecting the required job will populate the description on the jobsheet. The Repair Outlet is able to go back and change the job at any point during the creation of the jobsheet.

The Repair Outlet can enter any additional information about this job which may be of use if the jobsheet has to be referred to the Scheme Operator for authorisation.

The reason for carrying out the repair must be selected from the drop down list.

The GST rate defaults to 'standard' but can be amended if appropriate.

The Repair Outlet must show whether this is a variable priced job, a fixed price job or a warranty claim.

- For a warranty claim the job defaults to zero cost.

- For a variable job 1link populates the jobsheet with the standard repair time for the selected job, the actual time taken (which defaults to the standard time, but can be amended by the Repairer), the agreed hourly labour rate and the labour total. The hourly rate displayed will be that set by the fleet (if one has been set). If the rate differs from that set by the site a message will be displayed advising the site to check that the correct rate is used. The Repair Outlet can change the actual time taken and the labour rate and also choose to apply goodwill and/or a discount.

  Once a labour line has been added the Repair Outlet may want to add parts or fluids against that job.

  To add parts the Repair Outlet needs to input quantity, part code, description, unit price, discount and goodwill. The parts discount displayed will be that set by the Scheme Operator (if one has been set), although the Repair Outlet can change this. The system calculates the unit cost (unit price with discount and goodwill applied) and the item total (unit price multiplied by quantity).

  To add fluids the Repair Outlet needs to enter quantity, fluid type (selected from a drop down list) and unit cost. The fluid rate displayed will be that set by the Scheme Operator if one has been set (although the Repair Outlet can change this). The system will calculate the total cost of the fluid (unit cost multiplied by quantity).

- For a fixed price job the Repair Outlet should enter the fixed price and can also choose to apply goodwill. The fixed price shown is the price before any goodwill is applied. Details of parts and fluids can be added to the jobsheet but there are no separate prices attached.

e. **Investigate/other**

This option will be chosen where the Repair Outlet is either doing investigation work or cannot find the job described in the 'repair' section. Any work in this category will almost invariably cause the jobsheet to be referred to the Scheme Operator. The Repair Outlet should enter a description of the work being done, in free format text, along with the reason for carrying out the work (selected from a drop down list).

The GST rate defaults to 'standard'.

The Repair Outlet must show whether this is a variable priced job, a fixed price job or a warranty claim.

  i.   For a warranty claim the job defaults to zero cost.

  ii. For a variable priced job the Repair Outlet must complete the actual time, the agreed hourly labour rate, a parts total ('sundry parts') and fluids total ('sundry fluids'). For this type of job, parts and fluids are not itemised. The system will automatically calculate the labour total (actual time multiplied by hourly rate) and the line total (from the labour total plus parts total plus fluids total).

  iii. For a fixed price job the Repair Outlet should enter the fixed price.

f. **Fast Fit**

This option will be chosen if the Repair Outlet is part of a Fast Fit group where a product catalogue would have been offered by the Group to its Customers, this catalogue would include all of the products offered by the Repair Outlets within the Group.

Normally a Group would operate using the blind pricing functionality which means that when the Repair Outlets select the relevant item from the available list of products the value for the line would be hidden and may not be amended at all.

The GST rate will always be 'standard' for Fast Fit work.

3.9 Requesting Authorisation

Once a jobsheet has been built (see '*create jobsheet/booking*') the next step is for the Repair Outlet to request authorisation. The Scheme Operator determines the method of authorisation and the jobsheet will be compared against the rules set by the Scheme Operator.

If the jobsheet passes the rules set by the Scheme Operator then an 'authorisation request approved' message will appear and the Repair Outlet is able to proceed with the work to the vehicle. If the Repair Outlet subsequently finds that additional work is required a new job should be added to the jobsheet and another authorisation request submitted.

If the jobsheet fails any of the rules it will be referred to the Scheme Operator for consideration by a maintenance controller. In some instances the Repair Outlet will be warned that some area of the jobsheet requires correction and is given a chance to take action on this. Prior to submitting the jobsheet for authorisation the Repair Outlet has the opportunity to enter any additional information that they want the Scheme Operator to be aware of.

If the jobsheet is referred the jobsheet will acquire a status of 'authority requested' and can be seen from the 'jobs in progress' area of the mailbox. At this point no further action can be taken on the jobsheet until it has been dealt with by the maintenance controller. Repair Outlets are not advised of the reasons which cause a referral. Once the maintenance controller has responded to the authority request the response will be seen in the 'incoming messages' area of the mailbox.
Response to authorisation request

The response from the Scheme Operator to an authorisation request may be any of the following:

a. **Authorised**
   If the maintenance controller has authorised the jobsheet it will acquire a status of 'authorisation approved' and the Repair Outlet is able to go ahead with the work to the vehicle.

   If the Repair Outlet subsequently finds that additional work is required a new job line should be added to the jobsheet and another authorisation request submitted.

   Should the Repair Outlet subsequently remove a job that has been authorised from a jobsheet then the jobsheet must be submitted again for authorisation.

b. **Declined items**
   If any item on a jobsheet is declined by the maintenance controller then the declined item must be deleted from the jobsheet by the Repair Outlet. The reason for the work being declined will be visible within 'authorisation details'.

   Where there are other items on the jobsheet that have been authorised then, after deletion of a declined item and providing no other change is made to the jobsheet, the jobsheet can then be completed by the Repair Outlet without the need for re-authorisation.

c. **Request for Information**
   In some instances the maintenance controller may require further information before deciding whether to authorise a jobsheet. The jobsheet will appear in the 'incoming messages' area of the mailbox and the request for further information can be viewed from the 'authorisation details' section of the jobsheet. The Repair Outlet will need to provide the information required then again submit the jobsheet for authorisation.

d. **Deferred**
   The maintenance controller may temporarily put the jobsheet on hold whilst considering the authorisation request. Nothing else can be done by the Repair Outlet until the Scheme Operator has taken action.

3.10   Job Completion and Invoicing

Once work has been completed on a vehicle the next stages are to mark the job as completed and to request payment. A jobsheet can only be marked as complete and invoiced if it has a status of 'authorised'. A Repair Outlet user can only complete and invoice jobsheets if they have the appropriate permissions set ('job sheet completion' and 'job sheet request payment').

1. **Job completion**

   When marking the job as completed the Repair Outlet must enter the completion date and time (this will default to the current date and time but can be overwritten). The completion date will be shown as the 'repair date' on the invoice that is sent to the Scheme Operator.

   The screen will display a contact name and telephone number (for advising the customer that the vehicle is ready for collection) and the name and address of the Scheme Operator who is responsible for paying the invoice.

   If the job was initiated as a Future Work Booking and there is any outstanding work for the vehicle then details of outstanding work must be given here along with the date and time that the vehicle has been re-booked in for the work to be completed. A new booking will be generated and the new booking number displayed (the new booking can be accessed from the 'work bookings' area of the mailbox).

2. **Request payment (create invoice)**

   1link will display the name and ABN from whom the payment request will originate.

   1link will display the job total and suggested GST amount. The Repair Outlet must enter the actual GST amount which can vary from the suggested amount by +/- 0.02. This is to allow the GST amount on 1link to be changed in line with the GST amount shown in the DMS (Dealer Management System). Discrepancies can arise because of 'rounding' in the different systems.

   The Repair Outlet should then enter an invoice number (usually taken from their DMS system) and an invoice date. 1link will prevent the use of an invoice number that has been used by the same Repair Outlet in the previous 12 months.

   On confirmation of the request for payment an electronic invoice will be raised for collection by the Scheme Operator. The Repair Outlet need take no further action and should not send a paper invoice to the Scheme Operator. The jobsheet will acquire a status of 'payment requested' and can be viewed from the 'transactions for payment' area of the mailbox. It is recommended that the Repair Outlet print out a copy of the invoice to retain for their records.

3. **Credits**

   Following a request for payment, a Repair Outlet may subsequently wish to raise a partial or full credit against an existing invoice. A credit can be raised relating to a specific job on the jobsheet or for a general reason. The Repair Outlet must enter a credit note reference number, invoice date and reason for the credit. A credit cannot be raised where the amount to be credited would cause a negative amount on the jobsheet.

3.11   Exports/Reports

A number of standard reports are available to those Repair Outlet users who have the 'data exports/reports' permission set.

Service Bookings
This report gives a summary of Future Work Bookings, grouped by customer. The content of the report can be defined by entering specific search criteria and the resultant summary will show a list of bookings including job date, vehicle and booking reference.

A file extract can be downloaded (e.g. into an Excel spreadsheet) which gives a detailed list of bookings. Individual bookings can be viewed by clicking on the booking reference number on the summary screen.

Delivery and collections
This report summarises, by customer, those Future Work Bookings where delivery and collection is required. The content of the report can be defined by entering specific search criteria. Clicking on 'customer name' from the summary screen will show all transactions for that customer where delivery/collection is required. Individual bookings can be viewed by clicking on the booking reference number.

A file extract can be downloaded for further analysis.

Loan Cars required
This report summarises, by customer, those Future Work Bookings where a Loan Car is required. The content of the report can be defined by entering specific search criteria. Clicking on 'customer name' from the summary screen will show all transactions for that customer where a Loan Car is required. Individual bookings can be viewed by clicking on the booking reference number.

A file extract can be downloaded for further analysis.

Invoiced transactions
This report gives a summary, by Scheme Operator, of work that has been invoiced. The content of the report can be defined by entering specific search criteria. Clicking on 'customer name' from the summary screen will display a list of all invoiced transactions for that customer. Individual invoices can be viewed and printed by clicking on invoice number.

A file extract can be downloaded for further analysis.

To be Invoiced schedule summary
This report gives a summary by Scheme Operator of work that has not yet been invoiced. The content of the report can be defined by entering specific search criteria. Clicking on 'customer name' from the summary screen will display a list of all transactions that have not yet been invoiced for that customer. Individual jobsheets can be viewed and printed by clicking on job sheet number.

A file extract can be downloaded for further analysis.

Suspended transactions
This report displays a list of invoices which have been suspended by the Scheme Operator. It is currently of no relevance as it is for future functionality of automated payments.

3.12 View Invoices

The ability to view invoices can only be used by Repair Outlet users who have the appropriate permission set and is accessed by selecting '*view invoices*' from the HOME page.

The Repair Outlet can search for an invoice by entering any combination of:
- transaction type. Select from drop down list; for example, jobsheet invoice or site registration.
- customer
- invoice date
- registration number
- invoice number
- job number

The displayed invoice can be printed by the Repair Outlet – it should never be posted to the customer.

3.13   Compose Message

This functionality is available to those Repair Outlet users who have the appropriate permission set and allows the user to send a message to another user on 1link.

Select a contact, enter a subject and text then select 'send message' to transmit. This message will appear in the contact's mailbox.

4   REPAIR OUTLET ACCOUNT

This section describes the functionality that is available to Repair Outlet Account users. The Repair Outlet Account logon and functionality is quite separate from the access for Repair Outlet and group users, and would typically be given to accounting or financial users.

The functionality that is available to a Repair Outlet Account user will be dependant on how they are configured to use the system (by the use of user permissions). The user will logon to the 1link service, www.1link.com.au, using the logon name and password that has been allocated to them and the home page will display the functionality available. The HOME page displayed below is for a user who has access to all the available functionality.
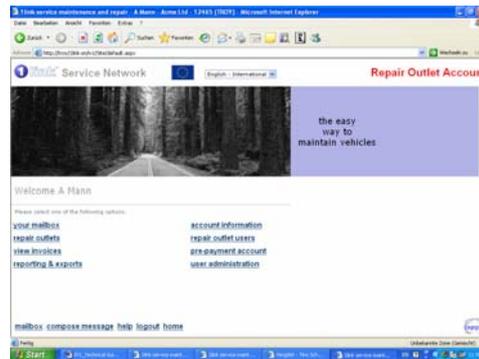
4.1	Mailbox
4.2	User administration
4.3	Account information
4.4	Repair Outlets
4.5	Repair Outlet users
4.6	Pre-payment account
4.7	Exports/reports
4.8	View invoices
4.9	Compose messages

4.1   Mailbox

The mailbox for Repair Outlet Account users only shows incoming messages and sent messages. It does not display jobsheets or bookings.

Search options at the top of the screen allow configuration of the view of the different areas of the mailbox. So, for example, messages are displayed if they fall within the time band specified (today, within 2 days, within 7 days, within 2 weeks, any date) and messages are ordered in the way specified (such as ascending date, descending date, message type). There is also a filter at the top of the screen to search for a specific message.

4.2   User Administration

This area of the system enables the administration and addition of user accounts. Each Repair Outlet Account user can be configured to only have access to the functionality they require - the table below shows a list of the permissions that can be set for each user.

Permission	Effect
Your mailbox	Enables access to the mailbox
Account information	Enables access to set up and amend Repair Outlet Account information
Repair Outlets	Enables access to set up and amend site information
Repair Outlet users	Enables access to set up Repair Outlet site users
View invoices	Enables access to view invoices
Pre-payment account	Enables access to view and top up the prepayment account
Reporting and exports	Enables access to run data exports and reports
Compose message	Enables access to send messages
View all messages	Enables access to view all mailbox messages for the Repair Outlet account

4.3 Account Information

In order for a Repair Outlet to operate using 1link, key account and banking information is required. This will allow electronic invoices to be created and received and payment transfers to be effected for charges relating to the use of the platform.

Repair Outlet Account information can be set up and updated from '*account information'* accessed from the HOME page. This functionality allows the viewing and modification of general information, such as contact details and address, and key information, such as bank account and ABN. These details are captured initially through the joining/application process but a change can be subsequently made or requested from this area.

View account information
These details relate to the financial account. It is crucial that these details are kept up to date, as the bank information is used to process both payments and receipts, as well as to debit any platform fee charges. If any of these details need changing select the following option 'modify general account information'.

Modify general account information
This functionality allows modification of the general account information such as address, contact name and number, invoice address and remittance instructions. These are the details that will be used and printed on any invoices that are raised.

Request a change to key account information
Changes to key account details are made by modifying the existing recorded details and submitting a change request to 1link product support. Approval of the change will be notified by a mailbox message.

Review existing key account information change requests
An audit trail of changes to key account information is given here.

Customer approval administration
This option allows the viewing and amendment of the trading status of a customer. If a customer is not set up then, whilst a Repair Outlet can still create a jobsheet and submit an invoice to the customer, they will be issued with a warning message at the point of creating the jobsheet that the account is not yet approved.

4.4   Repair Outlets

This area of the system allows the viewing or modification of the details which will be used for the directory entries for supplier sites, and can therefore be viewed by customers through the system. Repair Outlet information can be directly updated by the site as well as the Repair Outlet Account.

The service information displayed is as follows:

1. **Repair Outlet name and site ID**

2. **Account Name & Contact**

3. **Group member code**
    This cannot be updated by the Repair Outlet; it is set up by 1link product support. If the site is part of a group then the group code will be shown here. If a site is not correctly assigned to a group this will mean that the site will not be visible from the group view and any tariffs set by the group will not take effect for this site.

4. **Main contact**

5. **Telephone number**

6. **Fax number**

7. **Service Booking fax number**
    This is the number used for any reminders sent in respect of Future Work Bookings. The number can only be changed by 1link product support.

8. **Your Address & Postcode**

9. **Notification e-mail**
    A site can choose to receive a general e-mail when a new Future Work Booking or general message arrives in the 1link mailbox (this would only apply to sites that do not make frequent use of 1link). The e-mail address to which the notification is to be sent should be entered here.

10. **Site type**
    The site can indicate whether they are a fixed or mobile site. This is one of the search parameters that a Scheme Operator may use when searching for a site to select for a Future Work Booking.

11. **Vehicle Coverage**
    Identifies whether the site undertakes work on cars and/or Light Commercial Vehicles (LCV's)

12. **Repair types offered**
    These are the repair types offered by the site – service and repair, Mandatory Inspection, tyres and glass. This is one of the search parameters that a Scheme Operator may use when searching for a site to select for a Future Work Booking.

13. **Additional Services**
    The site can set up any additional services that they offer specifically, Loan car and collection and delivery. This is one of the search parameters that a Scheme Operator may use when searching for a site to select for a Future Work Booking. Alongside each additional service the site can enter any booking instructions which will be displayed to system users when they select this additional service.

14. **Delivery collection distance**
    The delivery collection distance set by the site shows the radius within which they offer a delivery and collection service. This is one of the parameters that a Scheme Operator may use when searching for a site to select for a Future Work Booking.

15. **Booking lead time**
    This shows the booking lead time set by the site. Providing a future dated booking is equal to or greater than the lead time specified it can be automatically accepted without reference to the site. If this field is blank it will default to 7 days. Booking acceptance lead times can also be set in respect of the differing services offered by the Repair Outlet, for example delivery and collection or use of a Loan Car. These times are set in '*tariff management'.*

    Note: even if the site has set a booking lead time for automatic acceptance, a Scheme Operator has the ability to decide whether they want this facility turned on or off (by setting the 'automatic Future Work Booking acceptance' in '*scheme details'*). So if the Scheme Operator does not want automatic booking acceptance a booking request will always be sent to a Repair Outlet for confirmation that they can do the work.

16. **Opening hours and holidays**
    This will show the normal opening hours and holidays as set up by the site. The opening hours will be used when a Future Work Booking request is being raised. If the request is for a date/time when the site is not open then 1link will ask the user to enter another date/time.

17. **Manufacturers**
    The franchises for which membership has been bought or applied for are listed along with the status of each application.

Adding a new franchise to a site can only be done by an authorised user such as the Repair Outlet Account (see '*Repair Outlet Account - Repair Outlets'*) or by product support.

When a modification is made to Repair Outlet details the date/time and name of the user is logged and displayed at the bottom of the screen. Changes take effect immediately the record is saved.

At the bottom of the service details screen there is a link to view the entry as it will appear in the 1link directory.

4.5   Repair Outlet Users

This option allows the Repair Outlet Account to create, update and delete Repair Outlet users at any of the sites. This functionality is also available to the system manager at an individual Repair Outlet site (but is restricted to updating users at that site only) and also to group Repair Outlet users.

See *'Repair Outlet – user administration'* for detail of the functionality.

4.6   Pre-payment Account

This option enables the management and top up of the supplier pre-payment account. The pre-payment account consists of a pre-paid amount to cover the processing fees incurred by the Repair Outlet sites that are using the 1link Service Network platform. The pre-paid amount is then gradually reduced by each transaction as it is processed by the system.

Processing fees may be incurred in respect of work bookings (where a charge is made for every work booking accepted on the system), created jobsheets, or commission charges (for those Repair Outlets that are part of a managed network).

The pre-payment account is set up with an initial balance determined for each country. Top ups can be requested on initial registration and later by selecting the 'top up' option. Invoices are prepared on top up application acceptance; therefore the invoice date will mirror the actual top up date. Top ups are available in various units and payment is by direct debit.

The amount remaining in the pre-payment account can be seen by selecting this option. The system will warn users when the pre-payment account is low and it is important to note that work bookings cannot be accepted if the pre-payment account falls below the unit booking fee.

Account usage
This option enables the Repair Outlet Account user to view the transaction fees that have been taken against the pre-payment account. The view can be refined to report on an individual Repair Outlet site or by a specific fee type or date range. An export file can be downloaded for further analysis if required.

Top up pre-payment account
This option allows the Repair Outlet Account user to credit the pre-payment account. Once the transaction has been confirmed the agreed amount will be debited from the bank account set up in '*account information'*.

4.7 Exports/Reports

A number of standard reports are available to Repair Outlet Account users.

Invoiced transactions
This report shows details of all invoices and credits and can be run between two dates. The report has selection criteria including the ability to select by Repair Outlet site and customer.

From the summary screen, clicking on 'customer name' will display a list of all invoiced transactions for that customer. From this screen there are options to download a file for further analysis or display and print a copy of the invoice.

To be Invoiced schedule
This report shows details of work which has not yet been invoiced. The report has selection criteria including the ability to select by Repair Outlet site and customer. From the summary screen, clicking on 'customer name' will display a list of all transactions that have not yet been invoiced for that customer and from this screen there are options to download a file for further analysis or display booking request details.

Suspended transactions
This report allows you to show details of invoices marked as suspended. The report has selection criteria including the option to search between two invoice dates and suspended dates.

4.8   View Invoices

This functionality allows the Repair Outlet Account user to view and print copies of electronic invoices raised by the Repair Outlets. It will allow for the monitoring and management of the workflow of each Repair Outlet, together with details of the transactions of individual customers.

4.9 Compose Messages

This functionality allows the user to send a message to another user on 1link.

Select a contact, enter a subject and text, and then select 'send message' to transmit. This message will appear in the recipients "Incoming Messages" section of their Mailbox.

5   REPAIR OUTLET GROUP VIEW

The main purpose of the group site is as a tool to enable a group to help their dealer sites make the best use of 1link. It enables the group to view and control activity across all sites within the group.

There are several benefits to a Repair Outlet group user in the way they are able to access the system. In particular they have:

a.   a 'birds eye' view of activity by sites within the group

b.   a view of individual site activity

c.   a view of invoiced transactions and also work which has not yet been invoiced

d.   the ability to respond to Future Work Bookings and direct them to individual sites

e.   the ability to control the functionality given to individual sites

f.   the ability to centrally manage price tariffs

g.   the ability to centrally manage tyre catalogue pricing

h.   the ability to invoice centrally

Much of the functionality available at group level is the same as that at Repair Outlet level so for this reason there is no detailed explanation of areas such as the mailbox or creating a jobsheet. The sections that are included below highlight specific differences at group level or aim to point out those areas which the group user would find of most benefit.

5.1   User administration
5.2   Group information
5.3   Controlling site functionality
5.4   Central tariff management
5.5   Tyre Catalogue Price Management
5.6   Future Work Bookings
5.7   Reports

The functionality that is available to a group user will be dependant on how they are configured to use the system (by the use of user permissions). The user will logon to the 1link service, www.1link.com.au, using the logon name and password that has been allocated to them and the home page will display the functionality available. The HOME page displayed below is for a group user who has access to all the available functionality.
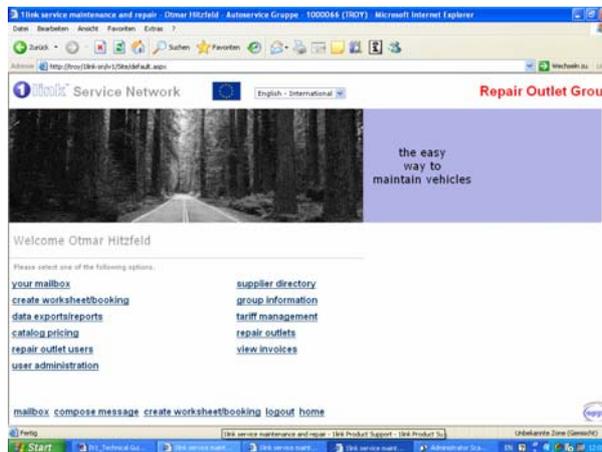
5.1　User Administration

User administration allows the group system manager to set up new group users and to control the way in which they can use the system (i.e. what functionality they can have access to).This area of the system can only be accessed by a group user who is set up as a system manager.

In adding a new user the following information needs to be set:

1. **User name**

2. **System manager**
   If the user is set up as a system manager they will have access to user administration (which allows the set up and configuration of other users) and may have a wider range of permissions granted than a normal user.

3. **User status**
   Set to 'active' or 'suspended'. If set to suspended the user will not be able to access the system.

4. **Job title**

5. **Email address**

6. **Login name**
   Automatically generated by the system and cannot be changed.

7. **Password**
   This can be set and subsequently changed by the system manager

8. **Permissions**
   The table below shows a list of the permissions that can be set for group users.

Permission	Effect
Your mailbox	Enables access to the mailbox
Supplier directory	Enables access to the supplier directory
Create jobsheet/booking	Enables access to create a job sheet
Group information	Enables access to view and update group information
Data exports/reports	Enables access to run data exports and reports
Tariff management	Enables access to view and update pricing tariffs
Catalogue pricing	Enables access to view and update tyre pricing
Repair Outlets	Enables access to view and update Repair Outlet information
Repair Outlet users	Enables access to update Repair Outlet users
View invoices	Enables access to view invoices
Logout	Redundant – has no effect
Help	Redundant – has no effect
Home	Redundant – has no effect
Compose message	Enables functionality to compose message
Vehicle check in	Vehicle arrived message is displayed when vehicle is checked in
Jobsheet request authority	Enables the user to request authorisation on a completed jobsheet
Jobsheet completion	Enables access mark job completed on a jobsheet
Jobsheet payment request	Enables the user to request payment on a completed jobsheet
Jobsheet issue a credit	Enables access to raise a credit note
Booking administration	Enables access to view and progress work bookings
Jobsheet administration	Enables access to view and progress job sheets
View all messages	Enables access to all team messages as well as individual user messages

5.2 Group Information

Group information is accessed from the HOME page and is set up by a group user who has the appropriate permission set.

1. **Group name**

2. **Main contact**

3. **Group member code**
    This is issued by 1link and must be assigned by 1link product support against each site within the group

4. **Repair Outlet Blind Entry**
    If this feature is set to Yes your repair outlets will be unable to see the price of any catalogue priced tyre or tyre service. This may be relevant if you have agreed tyre pricing and do not wish the repair outlet users to view this information. In order to completely hide this information you would also need to remove invoice viewing from their user permissions

5. **Repair Outlet Blind Job Completion**
    This option is found in Product Support, Group administration. Its use within the platform is to allow the closure of jobs without the need to enter any financial information. On completion of the jobsheet, the financial details are automatically populated by 1link using the suggested GST and gross values, this then places the job at a status of "Payment Requested" ready for payment. This is used predominantly by groups who utilise Blind Entry functionality within the platform and wish to ensure that financial control is locked down for all but the relevant parties.

6. **Group address**
    Use the postcode lookup feature to ensure the correct address is entered

7. **Notification email address**
    This is used to notify the group user when a new Future Work Booking request or general message has arrived in the 1link mailbox.

5.3   Controlling Site Functionality

The group is able to control the level of functionality that is available to individual Repair Outlet sites.

For example, the group may decide to totally control sites to the extent that the sites do not even have access to 1link; so the sites would appear in the service directory but all jobsheets and invoices would be raised at group level, with sites telephoning what is effectively a call centre at group level. At the other end of the scale, a group may decide to give total responsibility to each site so that each Repair Outlet sets up their own tariffs and manages their own work.

There are two tools within 1link to help control site functionality, both of which are accessed from the HOME page, providing that the group user has the appropriate permissions set:

a.   **Repair Outlet users**
This shows a list of all users set up within Repair Outlet sites. For each Repair Outlet user the group can determine the functionality that is allowed. This is done by using the radio buttons to set permissions on or off. The group can also amend the status of the Repair Outlet user (to active or suspended) and determine whether that user can be set as a system manager.

b.   **Repair Outlets**
This displays the details that have been set up relating to each Repair Outlet and which are ultimately displayed to fleet customers in the service directory (see *'Repair Outlet information'*). The group is able to view and amend the details for each Repair Outlet, including the types of repair offered, any additional services (such as providing a Loan Car, or collection and delivery), opening hours, and the booking lead times within which work will be automatically accepted.

5.4   Central Tariff Management

This functionality allows price tariffs to be managed centrally at group level on behalf of Repair Outlets. This includes the ability to set up labour rates, parts discounts (by franchise), fluid prices and Mandatory Inspection prices. These can be set with an 'effective from' date so that price tariffs can be prepared in advance. One advantage of setting price tariffs is that when a Repair Outlet is in the process of creating a jobsheet 1link can compare the labour rate set by the Scheme Operator with that set in the supplier tariff and warn the site if there is any discrepancy.

A group can set up centralised tariffs which can then be assigned against a Repair Outlet site and a customer, or all sites/all customers. The group can set up an individual tariff which can be assigned to a specific customer or a standard tariff which the system will use where there is not an individual tariff.

Tariff management is accessed from the HOME page providing that the group user has the appropriate permission set. For a full explanation of tariff management see '*Repair Outlets - tariff management'* the only difference with the group use of this functionality is that the group has the ability to decide to which Repair Outlet(s) a tariff is applied.

The ability to set centralised tyre pricing is also accessed from the HOME page providing that the group user has the appropriate permission set.

5.5   Tyre and Fast Fit Product Catalogue Price Management

Group users with appropriate permission will have the ability to initially download the standard product catalogue for the purpose of generating a proposed product price list for a specific Scheme Operator.

Note: The standard product catalogue comprises tyre data and tyre services data as well as fast fit products.

The Group can do this on behalf of all repair outlets within the Group.

A Scheme Operator is able to receive product tariff records from many Groups.

A Scheme Operator is able to receive multiple product tariffs from the same group.

The download will comprise of the following:
Product Code
Product Brand
Product Description
Product List Price
Product Type

Plus column headings (only) for:
Discount %
Product Net Price

This enables the distributor group to append discounts to specific tyres/services fast fit products or groups or category of tyre and thus generate a product tariff. This tariff is automatically applied to members of the Group. The distributor group is able to assign and publish that tariff to an individual Scheme Operator or multiple Scheme Operators. Equally a distributor group can download an existing tariff, amend and re-publish to the Scheme Operator.

Each published tariff has an 'effective from' date and defaults to 7 days from the current date (the individual tyre records within the tariff do not have such a date, only the tariff itself) and each tariff is identified that is of use to the recipient Scheme Operator. The ability is provided for the distributor to upload and thus publish this "unapproved" tariff.

Once uploaded, an appropriate message is sent to a user of the Scheme Operator with appropriate permission and the unapproved tyre tariff can be viewed on-line by that user.

The Scheme Operator is able to download the tariff for analysis and review (and manipulation). The Scheme Operator has no "upload" capability. The only option for the Scheme Operator is to approve or decline the "unapproved" tariff.

If the Scheme Operator approves the tariff, they can then assign it to one, or all or a number of its schemes.

If this approval is done prior to the effective date, the tariff has no effect until that date. In the meantime the Scheme Operator can access the tariff and Decline. This can only be done prior to the effective date. If the tariff is declined by the Scheme Operator, an appropriate message is sent to the distributor user, where the assumption is made that they will amend and re-publish. There is a maximum of two tyre tariffs relevant to a distributor – scheme relationship, the active one, and the future one. At any moment in time, only the active one applies.

Once a tariff is effective, the relevant product price is automatically populated in the worksheet. The distributor has the ability to amend the price, but if the tariff price is exceeded, the worksheet is referred.

An audit trail (showing user ID's and date) of publication and approval of product tariffs is available and may be viewed in 'Supplier Management', 'Tyre Product Pricing' section.

5.6 Future Work Bookings

Groups have the ability to accept Future Work Bookings on behalf of Repair Outlet sites. This is where a Scheme Operator has sent an electronic request for a future work booking to a site (rather than sending the request by fax).

The group can see all jobsheets that are being progressed by sites from the mailbox. The mailbox view will show the Scheme Operator and the Repair Outlet along with the transaction date and a status indicator (for example, showing an 'urgent to do' request). On opening the booking request the group can see what work is required and a requested booking date, along with any additional services required such as collection and delivery or Loan Car.

The group has the ability to accept the date requested on behalf of the Repair Outlet. The booking will then appear in the 'Future Work Bookings' area of the Repair Outlet mailbox for the Repair Outlet to action when the vehicle arrives, suggest an alternative date or decline the booking. Once a booking is confirmed the group (and the Repair Outlet site) still have the ability to reschedule the booking or amend it or record a 'no show' if the vehicle does not arrive on the due date.

The 'work bookings' area of the group mailbox gives a view of all the future work bookings, this in turn can be tailored to show 'booking requests' or 'confirmed bookings'. The ability to accept Future Work Bookings on behalf of Repair Outlet sites is dependant on the group user having the appropriate permission set.

For a full explanation on Future Work Bookings see *'Repair Outlets - Sections 3.6 and 3.7 '*.

A group user can also create a future work booking and direct it to a Repair Outlet (again providing that the group user has the appropriate permission set). For a full explanation on creating future work bookings see '*Repair Outlets – 'Sections 3.6 and 3.7'*.

5.7 Reports

There are a number of standard reports available on 1link for group users. A group user only has access to these reports if they have the appropriate permission set. Reports are accessed from the HOME page.

The majority of the reports are those which are accessible at site level (see '*Repair Outlets - data exports/reports*') with the ability for the group to view each report for all or individual sites.

In addition there is a report available at group level which summarises site activity. Again the group can view this report for all sites within the group or for an individual site. The report can be further defined by entering a date range. The report shows for each site a summary of the Future Work Bookings, jobsheets, invoices, and credit notes.

Another report which is available to the group user gives a view of any type of invoice raised within or concerning the group. This is accessed from 'view invoices' on the HOME page (providing the group user has the appropriate permission set). This gives the ability for the group user to view, for example, site registration invoices for all the group sites, jobsheet credits and invoices. The group user can drill down through the summary to a copy of an individual invoice.

The user can search for an individual invoice by entering any combination of:

- Transaction Type - Select from drop down list; for example, jobsheet invoice or site registration
- Customer
- Repair Outlet Name
- Invoice Date
- Registration Number
- Invoice Number
- job number