



Shop Training Manual



Auto Integrate Advantages

Independent Vendors

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

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

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

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

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

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

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

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

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

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

CREATE A REPAIR ORDER



HomeRepair OrdersAdministrationSupport

Repair Order Manager

View / edit all your repair orders here

Account Information

There are Fleet Management Companies using this platform that you have not accepted terms and conditions for.
In order to trade with these companies please [click here to review and accept the terms and conditions](#).

Add New Repair Order

Find Existing Repair Orders

RO ID

Status

Active

VIN

Driver Name

RO Creation Date

License Plate

Invoice Number

Search

View All

Repair Orders ✓

Archive ✓

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

Add New Repair Order

Step 1: Select Vehicle

Search for Vehicle

Select fleet company, enter VIN and press Search.

Fleet Company VIN

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

Add New Repair Order

Step 1: Select Vehicle

Search for Vehicle

Select fleet company, enter VIN and press Search.

Fleet Company VIN (last 8 chars)

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

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

Enterprise Terms & Conditions

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

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

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

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

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

Add New Repair Order

Step 2: Enter Odometer Reading

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

Odometer Reading

Enter Mileage and click "Next"

Shop Details

Shop Contact Name

Shop Call Back Number ext.

Invoice Number

Vehicle Arrival Date

Vehicle Arrival Time PM

Driver Name

Driver Phone Number ext.

Driver Card Number

Driver Is Waiting ☐

Vehicle Towed ☐

Payment Type

Payment Direction

Driver Complaint

Continue

Cancel

Enter your name here

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

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

Repair Order Details

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



Repair Order ID: 6004439 Invoice Number: 1123455

Not Submitted



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

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



Select Quick Repair ▼

No line items have been added to this repair order

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

SubTotal (exc. Tax) \$0.00

Add repairs to estimate

Select appropriate tab:

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



Return to ROM



Cancel Repair Order

Add New Repair Order Item

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

Search for Service Code

(example: brake fluid)

Browse All Service Codes

Service/Repair (26)

☐ Accessories, Options, & AMEs (72)	☐ Heating and Air Conditioning (101)	☐ Relays and Modules (18)
☐ Belts	☐ Hybrid Drive Systems (6)	☐ Restraint Systems (11)
☐ Body and Frame (53)	☐ Instrument Panel, Gauges and Warning Indicators (137)	☐ Sensors and Switches (21)
☐ Brakes and Traction Control (30)	☐ Lighting and Horns (49)	☐ Starting and Charging (7)
☐ Courtesy Check	☐ Lube Chassis Service	☐ Steering and Suspension (7)
☐ Cruise Control (23)	☐ Maintenance (23)	☐ Transmission and Drivetrain (29)
☐ Diagnostics (11)	☐ Miscellaneous (24)	☐ Windows and Glass (7)
☐ Engine, Cooling and Exhaust (6)	☐ Powertrain Management (11)	☐ Wiper & Washer Systems (54)
☐ Equipment (14)	☐ Preventative Maintenance (50)	

Search by term:

- Most common search terms can be found here

Browse by service code:

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

Search by category:

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

Add New Repair Order Item

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

Labor

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

Select	Correction	Description	Job Description
☒	Non Listed Labor		

Parts

Select	Service Code	Parent Name	Part Name	Description
☒	Semi-Synthetic Lube Oil Filter	Non Listed Part		

Helpful Hints:

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

Add New Repair Order Item

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

Line Item	Time (Hrs)	Rate (\$/Hr)	Unit Cost	Qty	Total Cost
Labor Correction Select One		95.00	\$0.00	1	\$0.00
Part Name Semi-Synthetic Lube Oil Filter Part Code Manufacturer Name				1	\$0.00

Other Details
 Cause Select One
 Notes

Back Cancel **Confirm** **Add Another**

Enter values in the following fields:

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

Select appropriate:

- Labor Correction
- Cause

Next:

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

PM Repair/Service Tires Fees Damage

Select Quick Repair

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

Ability to:

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

Once estimate is complete and subtotal is confirmed:

- Submit for Authorization

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

Return to ROM

Submit For Authorization

Cancel Repair Order

Submit For Authorization

Estimated Completion

Estimated Completion Date *

Estimated Completion Time

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

Tax

Total Before Tax \$49.49

Tax

Total After Tax \$52.95

Submit For Authorization **Cancel**

- Enter Estimated Completion Time and Date

- Enter Sales Tax

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

- Confirm Total After Tax is correct

- Submit for Authorization

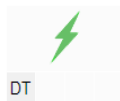
Repair Order Details

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



Repair Order ID: 6004439 Authorization Number: 6004439A4160

Auto-Approved



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

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

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

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

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

PM Repair/Service Tires Fees Damage Select Quick Repair

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

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

SubTotal (exc. Tax)	\$49.49
Tax	\$3.46
Total (inc. Tax)	\$52.95
Electronic Payment Fee	(\$1.96)
Payable Amount (inc. Tax)	\$51.89

Return to ROM

Work Completed Cancel Repair Order

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

Repair Order Completion

Work Dates

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

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

Tax & Shop Invoice Number

Total Before Tax: \$49.49 Invoice Number: 1123455

Tax: 3.46

Total After Tax: \$52.95

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

Save Cancel

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

- Confirm sales tax

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

- Confirm invoice number

- Save

**Once the order is saved, you will not be able to make any changes. You will receive payment in 24-48 hours.