Repairer Portal User Guide

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Introduction

This guide provides instructions for using Custom Fleet's Repairer Portal application. The Repairer Portal provides the ability to manage and track the status of repair jobs for Custom Fleet vehicles.
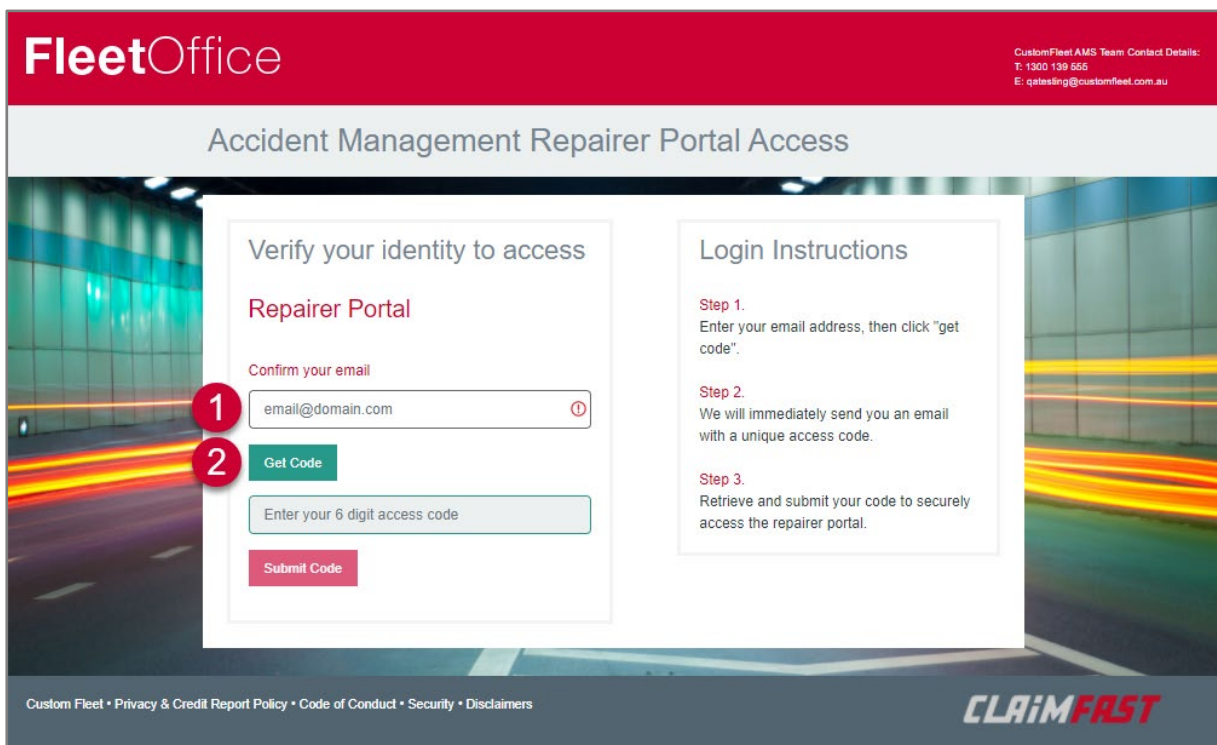
If you require further support or would like to provide feedback, please contact the Accident Management team at Custom Fleet.

Accessing the Repairer Portal

Emails are sent from Custom Fleet with links to the Repairer Portal. After clicking on these links, the Repairer Portal login page is displayed as shown below.

A confirmation pop-up window is displayed confirming an email has been sent to the email address provided. Click on the *OK* button to close the pop-up window.
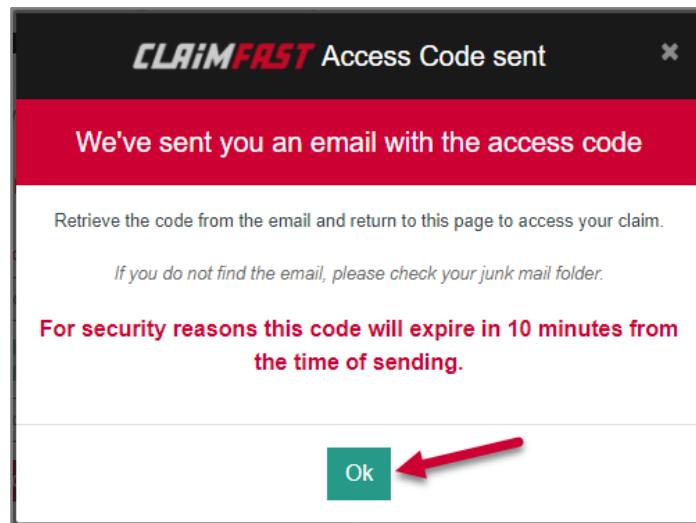
An email is sent to the email address provided with a code as shown in the example below.
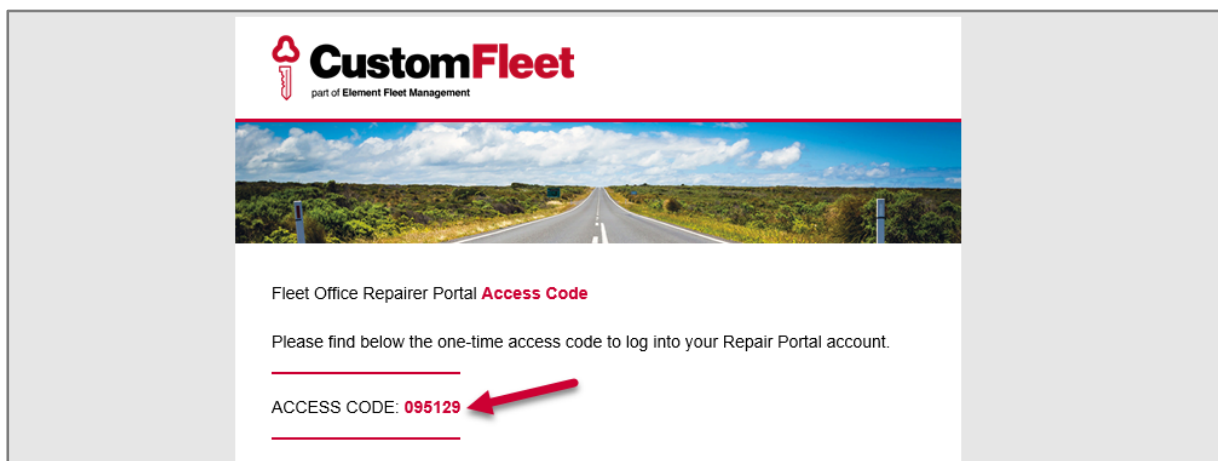
If the email has been entered incorrectly or does <u>not</u> match the email address recorded on our system, the below error message is displayed. Please first check the email address is entered correctly and contact us via phone or email if the issue persists.
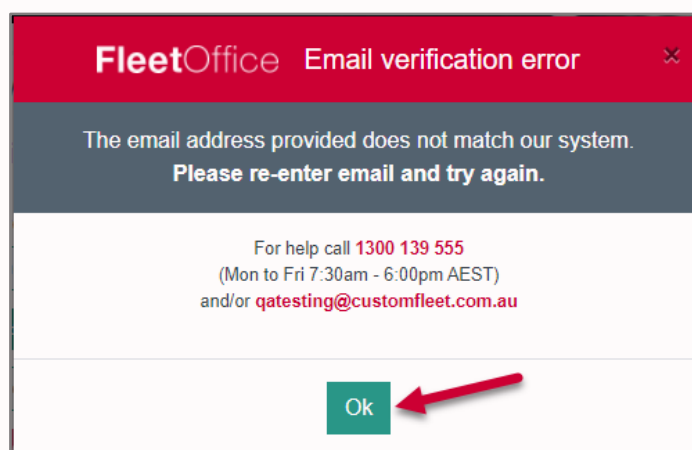
Once the email has been received:

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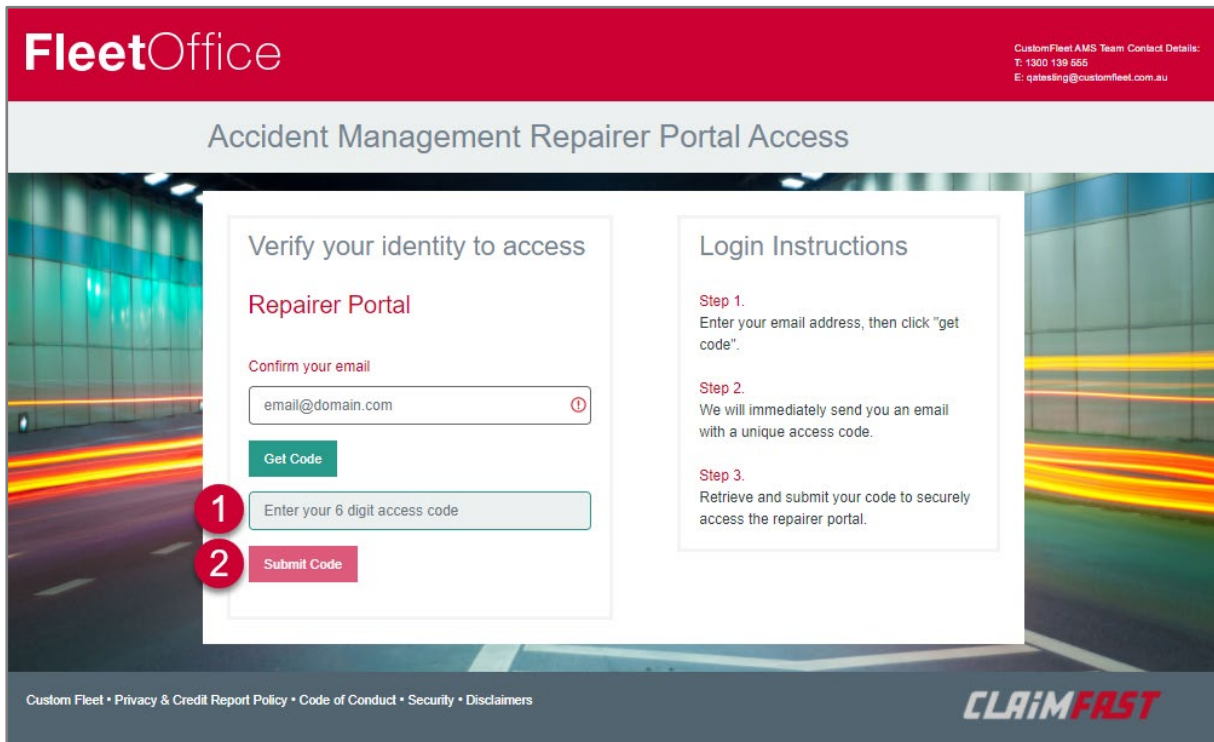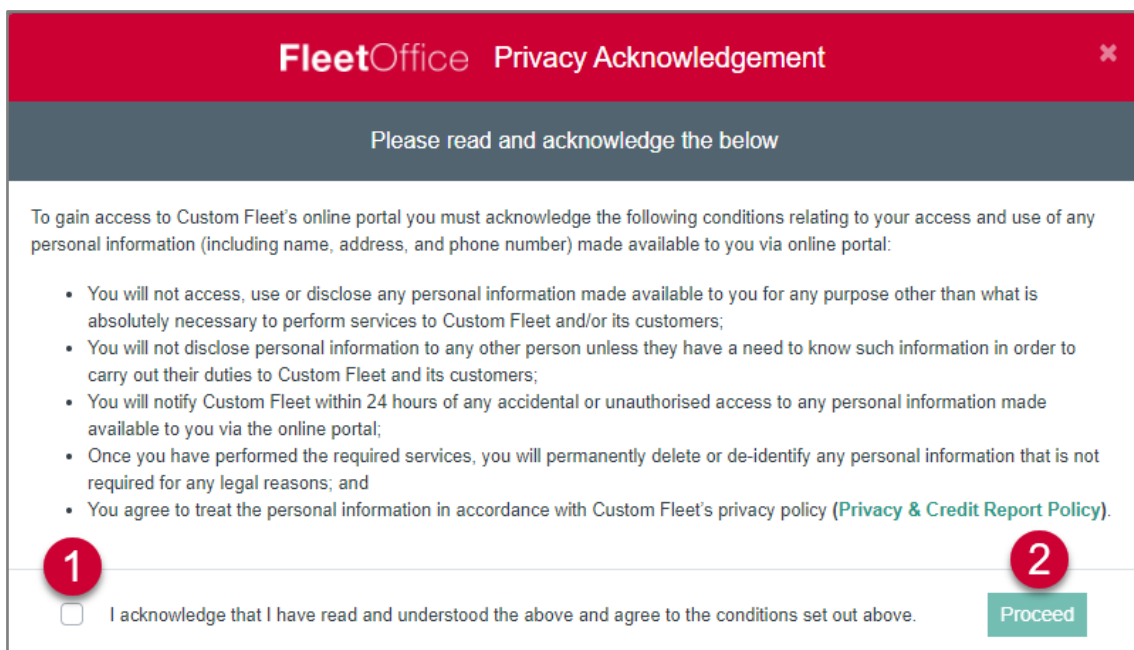A pop-up window is displayed requiring acknowledgement of how you will access and use personal information made available via the Repairer Portal.

1 Click on the check box to confirm acknowledgement of the conditions listed.
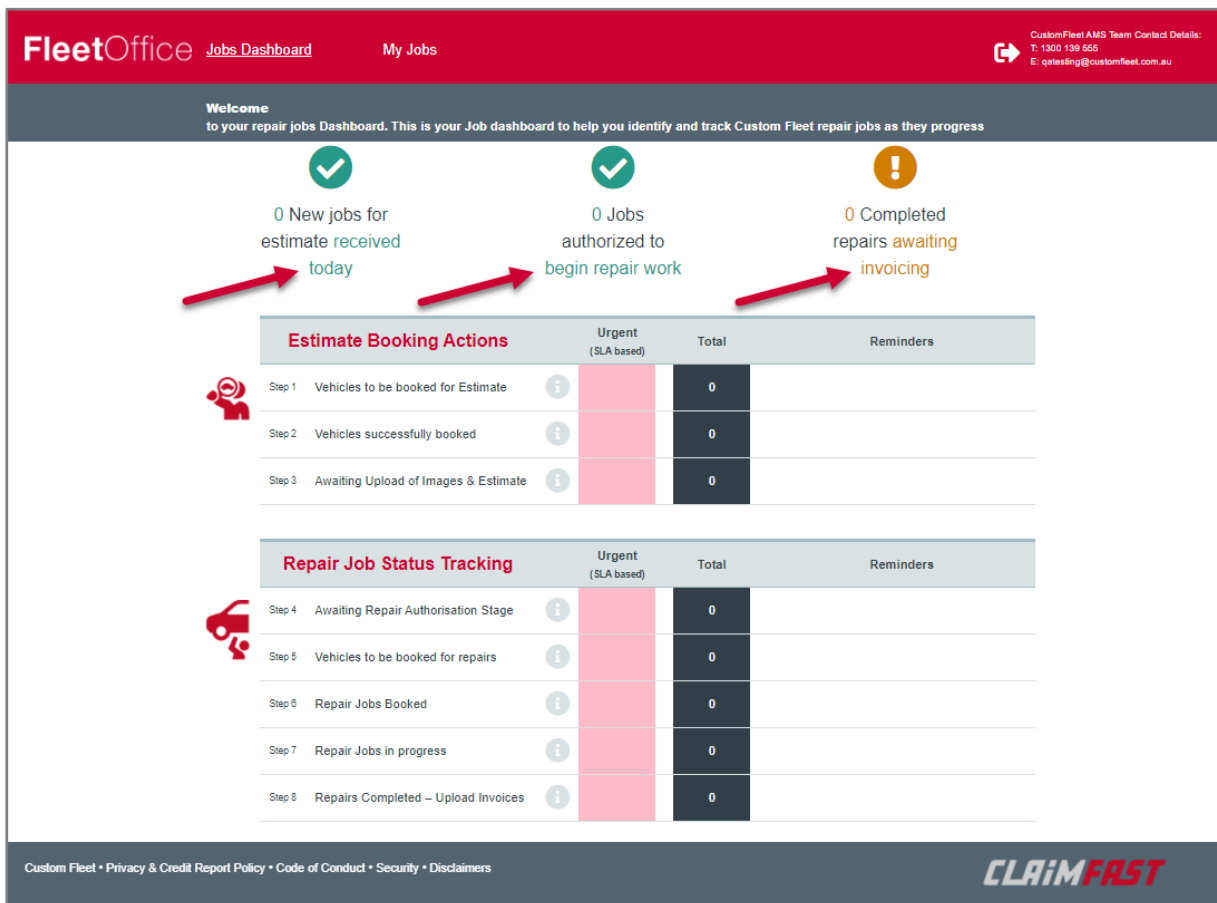
2

Jobs Dashboard screen

To access this screen, click on the *Jobs Dashboard* link at the top left-hand side.

The Jobs Dashboard screen provides a snapshot of all active jobs assigned to you from Custom Fleet and their pending actions. Click on the links under each header to view the applicable jobs via the My Jobs screen (see below).

Note: This screen is being developed further. Once finalised, an updated user guide with confirmation of the changes will be provided.

My Jobs screen

To access this screen, click on the *My Jobs* link at the top left-hand side.

The My Jobs screen lists all jobs that have been assigned to you from Custom Fleet.

A

B
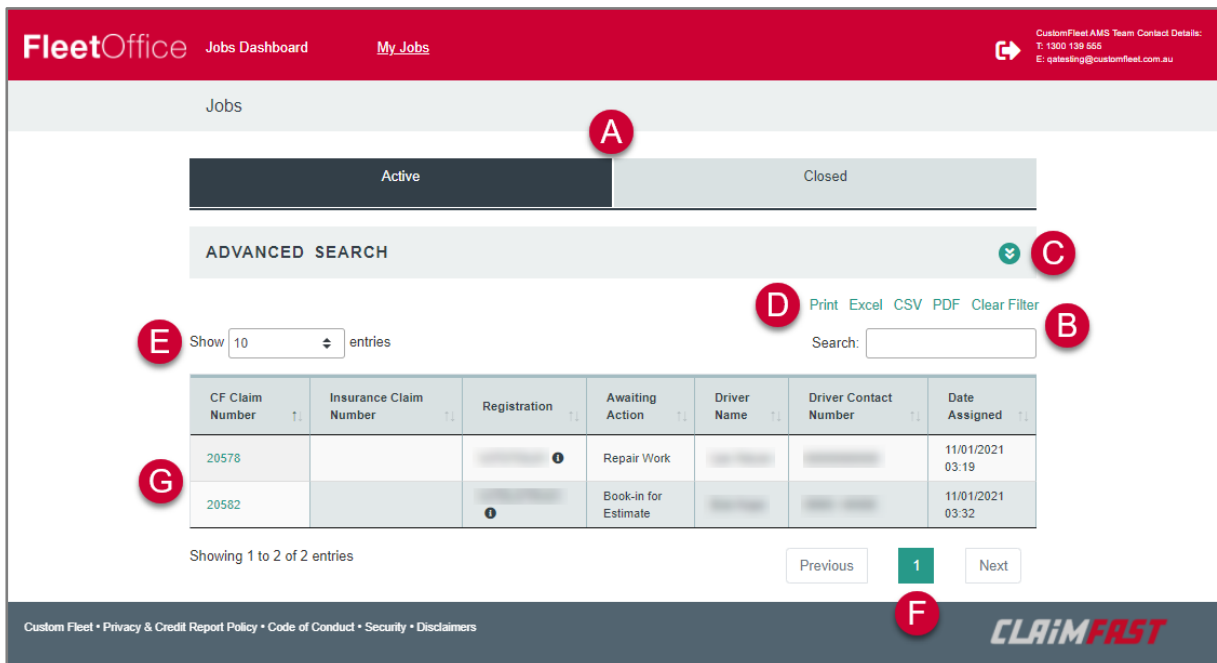
C Click on the chevron icon () to view additional search filter options. Enter a search term to narrow the jobs displayed by Custom Fleet claim number, insurer claim number, vehicle registration and job status.

D To export the jobs displayed on the page, click on *Print* to send the page to your printer, or click on the desired file format (*Excel*, *CSV*, *PDF*) to save a copy to a local drive on your computer.

E The number of pages displayed on the screen at once defaults to 10. To display more jobs on the screen, click on the drop-down menu to select '25', '50' or '100'.

F Use this section to navigate between pages when applicable by clicking on the page number or the *Previous* and *Next* buttons.

G

My Jobs – Claim Details screen

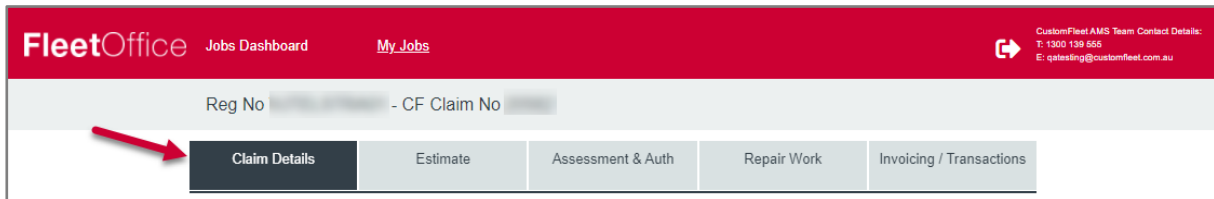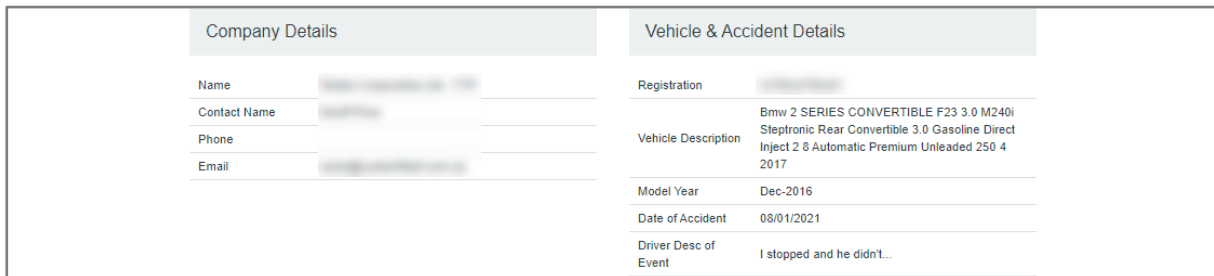To access this screen, click on the *Claim Details* tab. This is the default screen displayed after clicking on a claim number on the My Jobs screen.

The first part contains *Driver Details* and *Insurance Details* sections.

The second part contains *Company Details* and *Vehicle & Accident Details* sections.

The next part contains details of the damage to the vehicle to be quoted on. Click on each sub-menu on the right-hand side to view further details.

When available, the final part lists photos or videos for viewing and downloading.

My Jobs – Estimate screen

To access this screen, click on the *Estimate* tab on the top menu bar. This screen is used to update Custom Fleet on the progress of booking in the vehicle for assessing repairs and uploading the final repair estimate details. This is the default screen displayed after clicking on a link provided in an estimate request email from Custom Fleet.
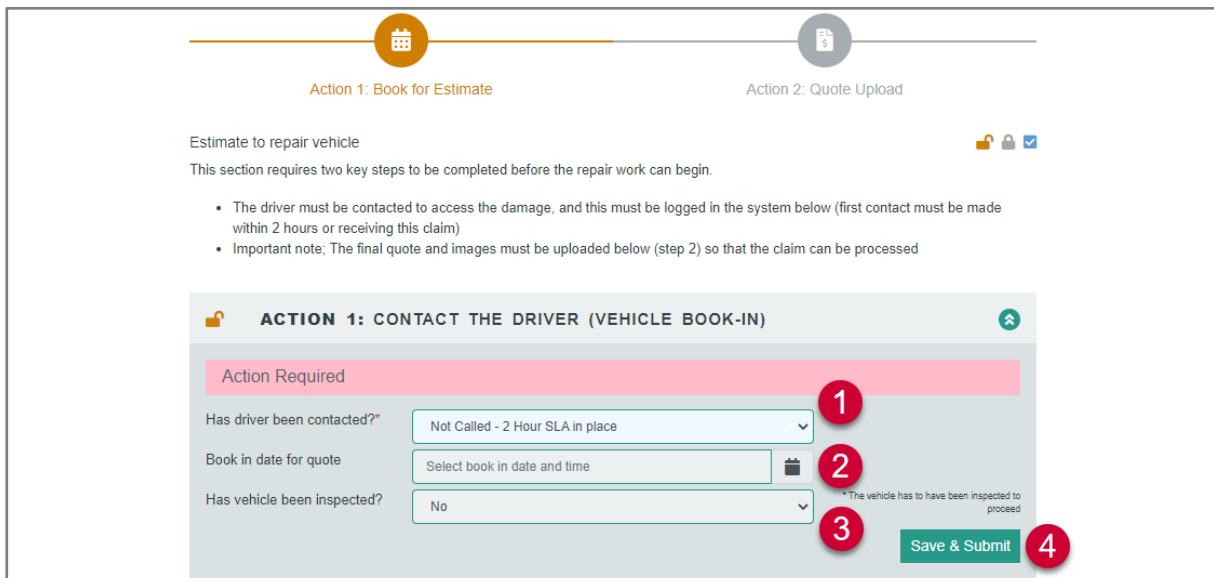
Action 1: Contact the driver (vehicle book-in)

The first action required on this screen is to confirm the outcome of contacting the driver to organise a booking to assess the vehicle damage.
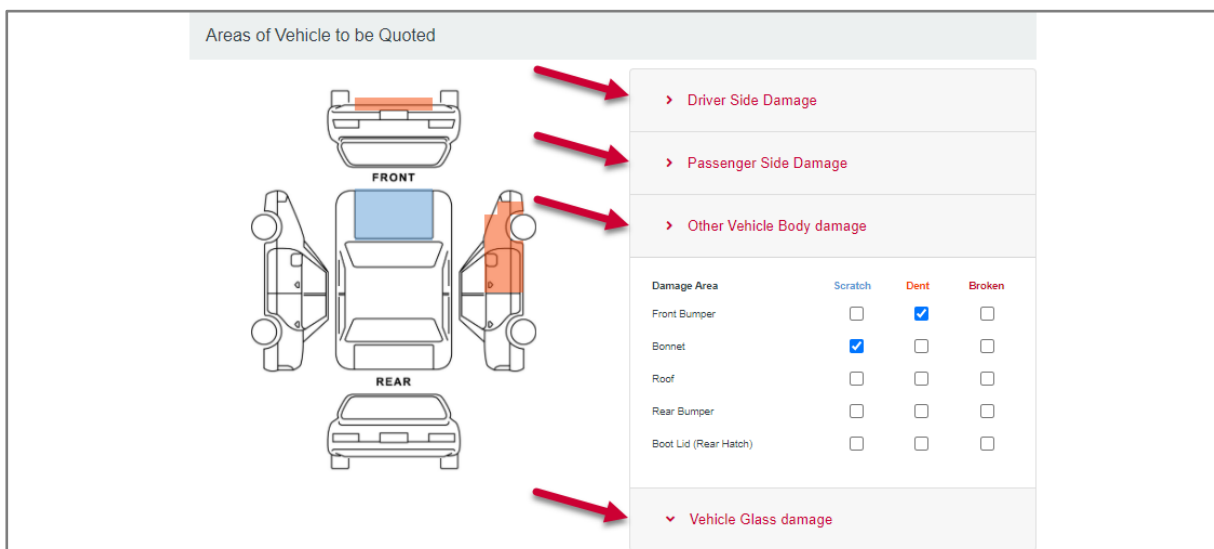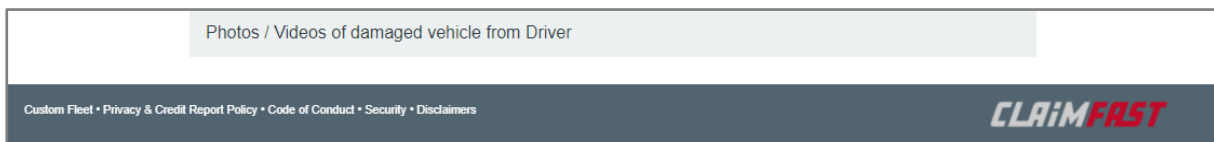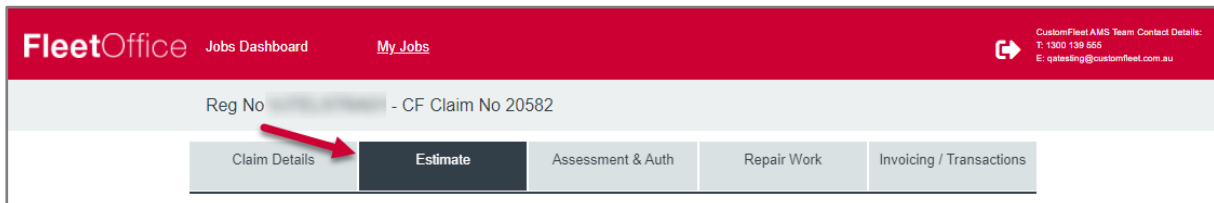
Note: These steps may be repeated multiple times depending on the outcome of each call.

1 Click on the *Has driver been contacted?* drop-down menu and select the outcome of contacting the driver.

2 When 'Called – book-in date agreed' has been selected in the previous step, click on the calendar icon to select the date and time of the booking.

3 Click on the *Has vehicle been inspected?* drop-down menu and select the appropriate option.

4 Once the information has been entered, click on the *Save & Submit* button.

A confirmation pop-up window is displayed. Click on the *Yes* button to proceed or click on the *No* button to cancel the submission.

After proceeding, a success pop-up window is displayed. Click on the *OK* button to return to the Repairer Portal.

| Are you sure? ✖ |
| This information cannot be updated at a later stage. |
| No   Yes |

| Saved |
| Click OK to proceed. |
| OK |
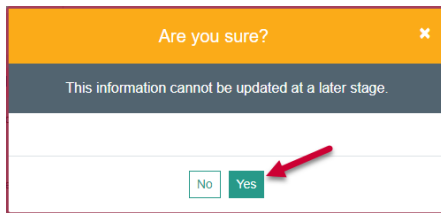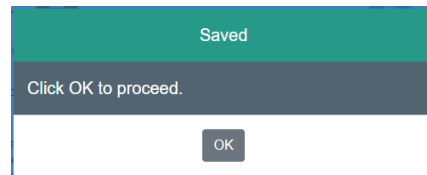
Action 2: Upload final quote estimate

The second action required on this screen is to upload confirmation of the final estimate for vehicle repairs.

1 Enter the final estimated repair amount (GST inclusive) in the *Estimated Repair Cost* text field.

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3 Enter the estimated number of days to repair the vehicle in the *Estimated No. of Repair Days* text field.

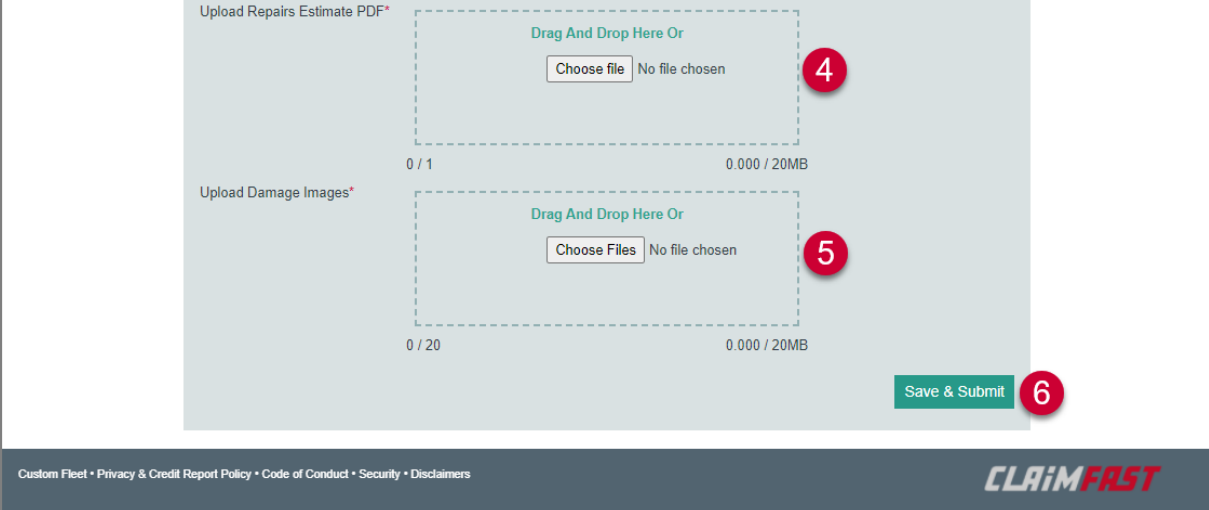④ Drag and drop a PDF of the repair estimates from your computer to the *Upload Repair Estimates PDF* section. Alternatively, click on the *Choose file* button to locate a PDF of the repair estimates on your computer.

⑤ Drag and drop photos of the vehicle damages from your computer to the *Upload Damage Images* section. Alternatively, click on the *Choose file* button to locate photos of the vehicle damages on your computer.

⑥ Once all of the required information has been entered, click on the *Save & Submit* button.

A confirmation pop-up window is displayed. Click on the *Yes* button to proceed or click on the *No* button to cancel the submission.

After proceeding, a success pop-up window is displayed. Click on the *OK* button to return to the Repairer Portal.
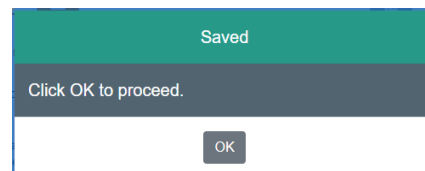
Notes:

- The PDF file name is displayed and may be removed if uploaded in error by clicking on the bin icon. A maximum of 20MB of files may be uploaded in this section.

- Image files must be in .png, .jpg, .jpeg or .gif format. The images are displayed for review and may be deleted if uploaded in error by clicking on the *Delete* button. A maximum of 20MB of files may be uploaded in this section.

My Jobs – Assessment & Auth screen

To access this screen, click on the *Assessment & Auth* tab on the top menu bar. This screen is used to record when an onsite assessment of the vehicle is required, and insurer authorisation has been provided to proceed with repairs.
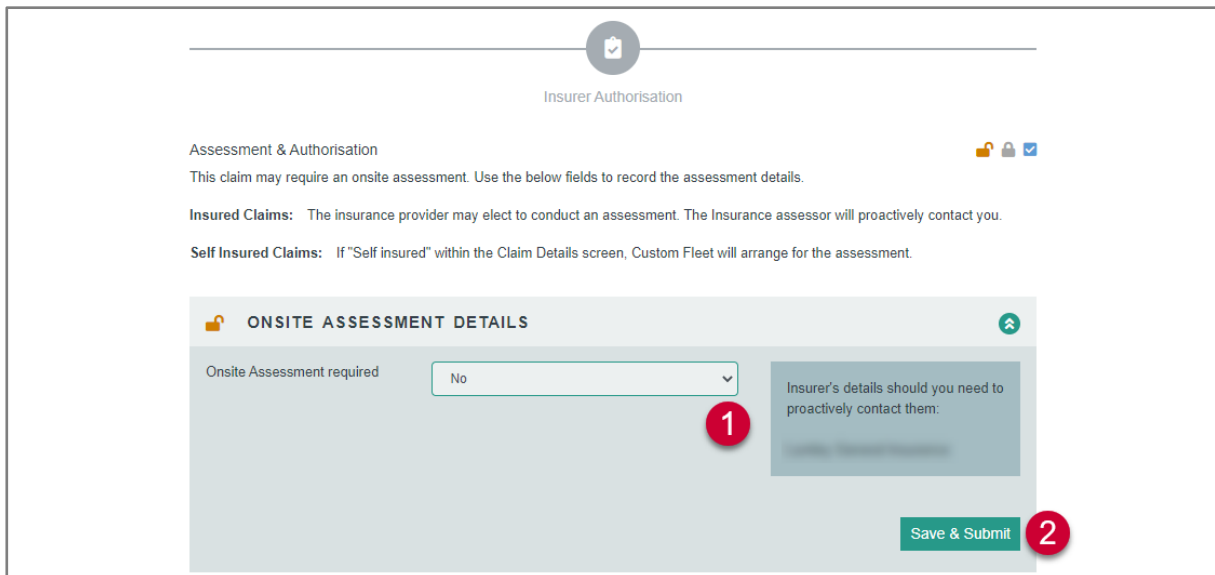

Action 1: Confirm onsite assessment

The first action required on this screen is to confirm whether an onsite assessment has been requested by the insurer.
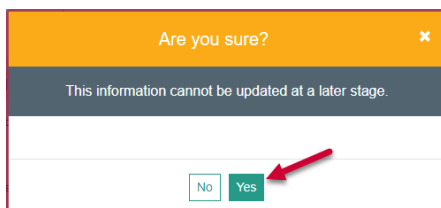
1 Click on the *Onsite Assessment required* drop-down menu to select 'Yes' when an onsite assessment has been requested by the insurer.
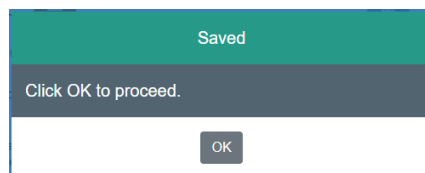
2

Note: The insurer's details are listed on the right-hand side for easy reference.

A confirmation pop-up window is displayed. Click on the *Yes* button to proceed or click on the *No* button to cancel the submission.
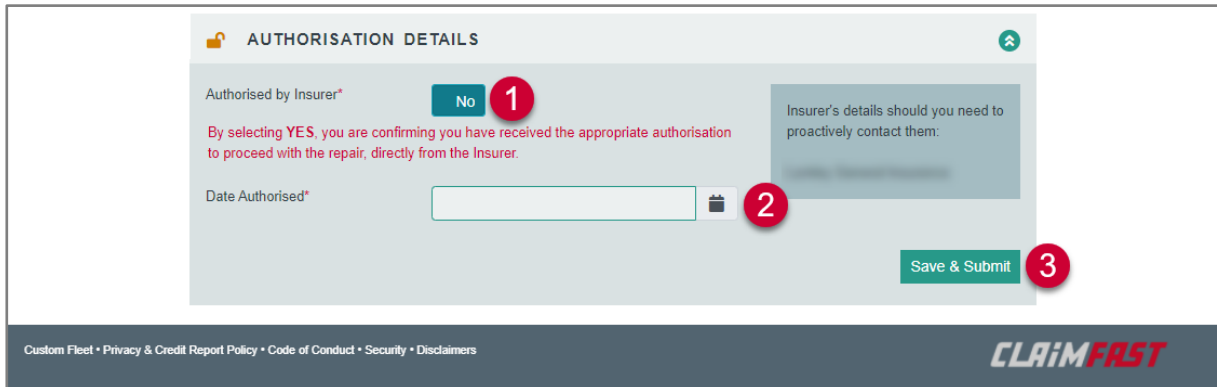
After proceeding, a success pop-up window is displayed. Click on the *OK* button to return to the Repairer Portal.
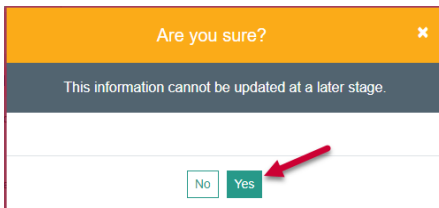
Action 2: Confirm insurer authorisation

The second action required on this screen is to confirm the insurer has provided authorisation to proceed with vehicle repairs.

1

2 Click on the calendar icon next to the *Date Authorised* text field to select the date authorisation was received from the insurer.

3

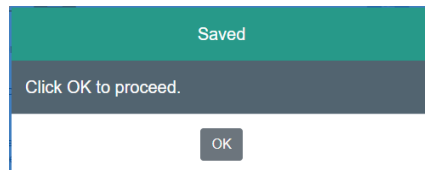A confirmation pop-up window is displayed. Click on the *Yes* button to proceed or click on the *No* button to cancel the submission.

After proceeding, a success pop-up window is displayed. Click on the *OK* button to return to the Repairer Portal.

My Jobs – Repair Work

To access this screen, click on the *Repair Work* tab on the top menu bar. This screen is used to confirm when the vehicle has been booked in for repairs, record the progress of the vehicle repairs and verify their completion.

Action 1: Contact the driver (vehicle book-in)

The first action required on this screen is to confirm the outcome of contacting the driver to organise a booking to repair the vehicle damage.

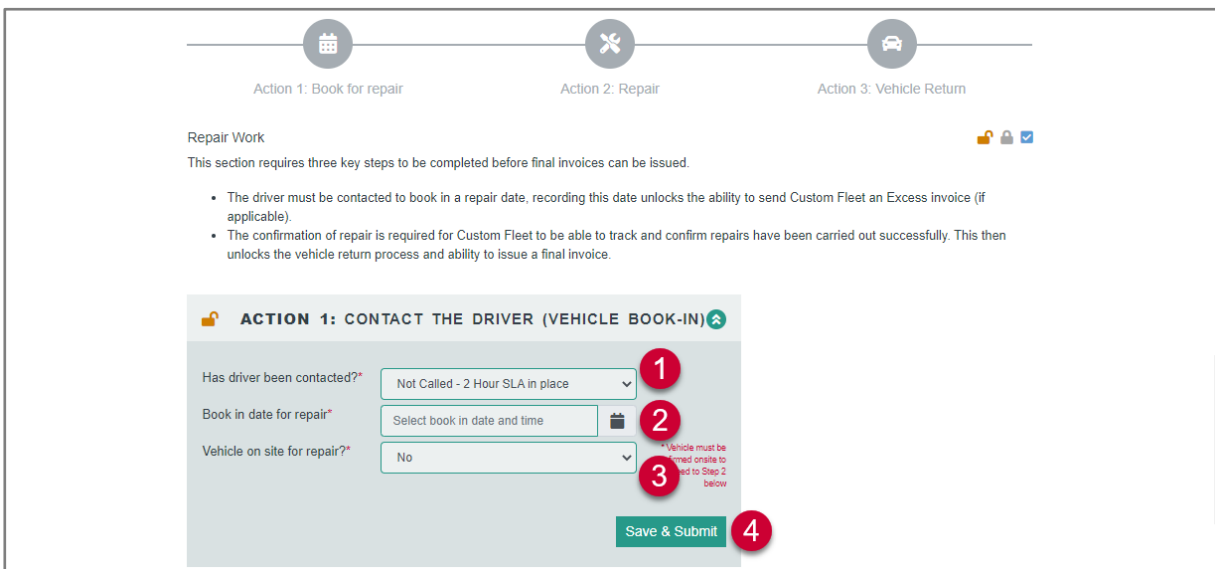**Note:** These steps may be repeated multiple times depending on the outcome of each call.

A confirmation pop-up window is displayed. Click on the *Yes* button to proceed or click on the *No* button to cancel the submission.

After proceeding, a success pop-up window is displayed. Click on the *OK* button to return to the Repairer Portal.

Action 2: Vehicle repair actions

The second action required on this screen is to record the progress of actions taken to repair the vehicle.

Note: These steps may be repeated multiple times depending on the outcome of the actions.

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3 Click on the *Is repair completed?* drop-down menu and select the appropriate option.

4 Click on the calendar icon next to the *Actual repair finish date* text field to select the date vehicle repairs were actually completed.

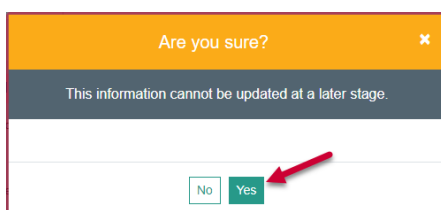**5** When applicable, click on the *Reason for Finish Delay* drop-down menu and select the appropriate option.
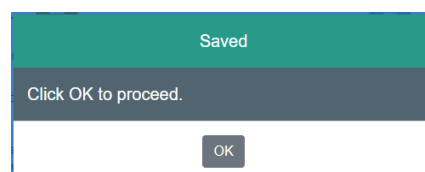
6

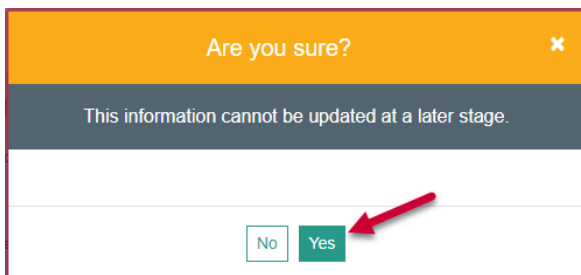A confirmation pop-up window is displayed. Click on the *Yes* button to proceed or click on the *No* button to cancel the submission.

After proceeding, a success pop-up window is displayed. Click on the *OK* button to return to the Repairer Portal.

Action 3: Vehicle return actions

The third action required on this screen is to record the return of the vehicle after repairs.

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3 Once all of the required information has been entered, click on the *Save & Submit* button.

A confirmation pop-up window is displayed. Click on the *Yes* button to proceed or click on the *No* button to cancel the submission.

After proceeding, a success pop-up window is displayed. Click on the *OK* button to return to the Repairer Portal.

My Jobs – Invoicing/Transactions screen

To access this screen, click on the *Invoicing/Transactions* tab on the top menu bar. This screen is used to upload excess and repair invoices for payment by Custom Fleet and track financial transactions between you and Custom Fleet.
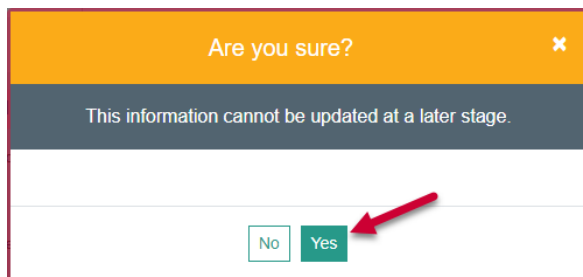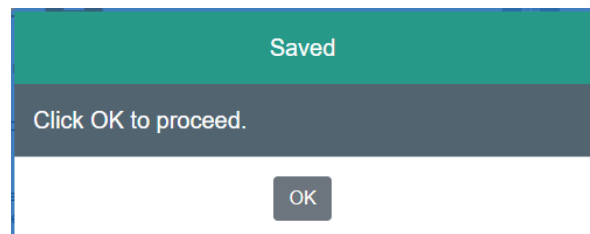
Note: The repair invoice and (when applicable) the excess invoice must be uploaded on this screen to close the job on the Repairer Portal.
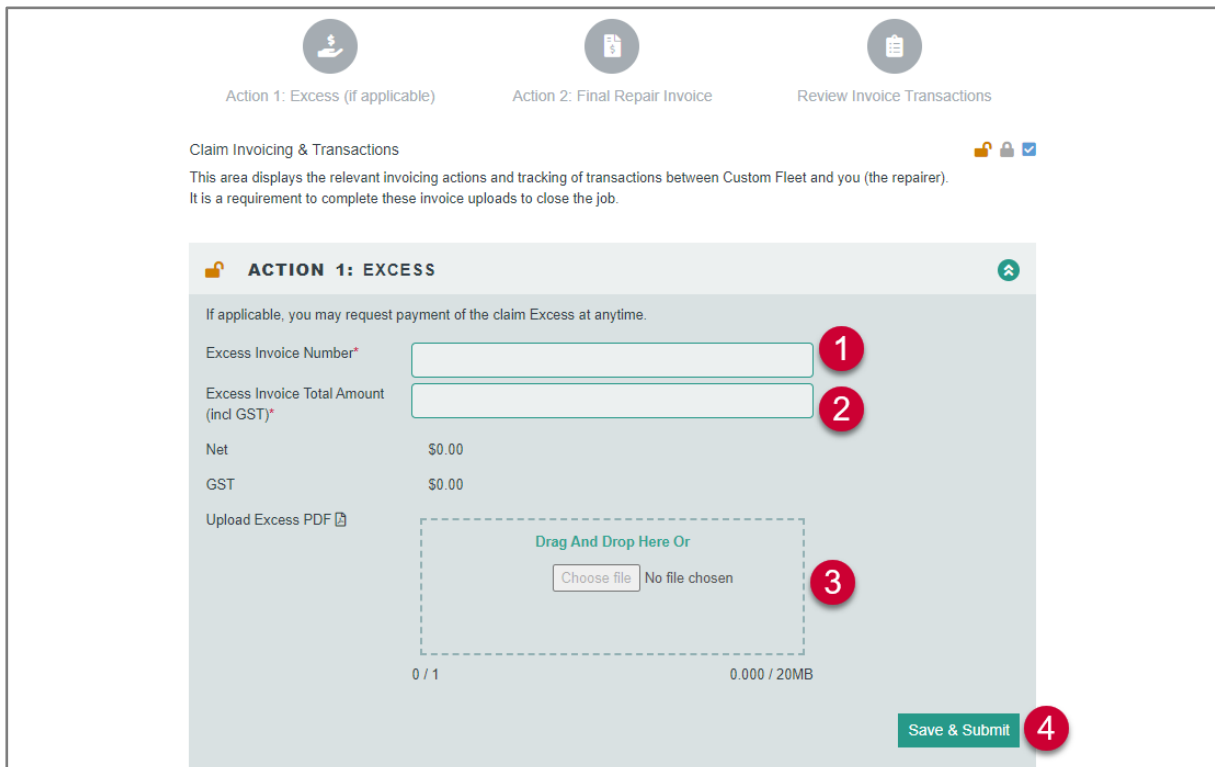
Action 1: Excess (when applicable)

When applicable to the claim, the first action required on this screen is to confirm the excess invoice details and upload the invoice for payment by Custom Fleet.

A confirmation pop-up window is displayed. Click on the *Yes* button to proceed or click on the *No* button to cancel the submission.

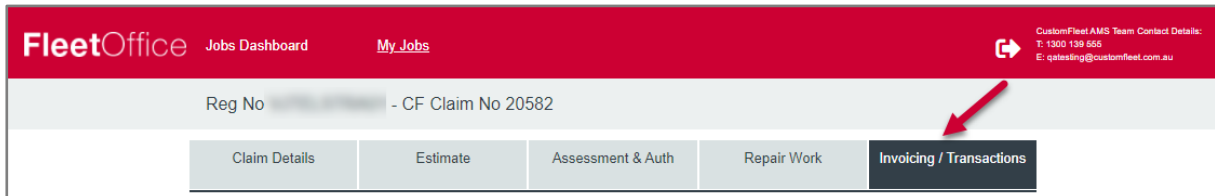After proceeding, a success pop-up window is displayed. Click on the *OK* button to return to the Repairer Portal.

Are you sure? ✖
This information cannot be updated at a later stage.
No   Yes

Saved
Click OK to proceed.
OK

Action 2: Vehicle repair actions

The second action required on this screen is to confirm the repair invoice details and upload the invoice for payment by Custom Fleet.

1

2

3

4

🔓 **ACTION 2:** REPAIR INVOICE UPLOAD ⬆

If applicable, you may request payment of the claim Excess at anytime.

Repair Invoice Number*   [＿＿＿＿＿＿＿] **1**
Repair Invoice Amount*   [＿＿＿＿＿＿＿] **2**
Net $0.00
GST $0.00
Upload Invoice PDF 📄
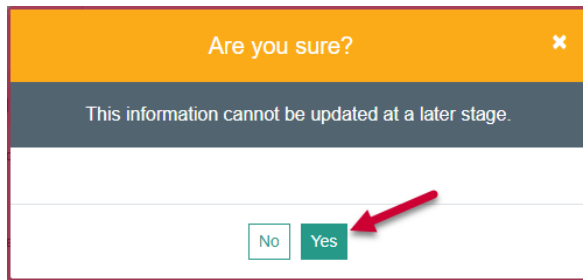
     Drag And Drop Here Or
     Choose file   No file chosen   **3**
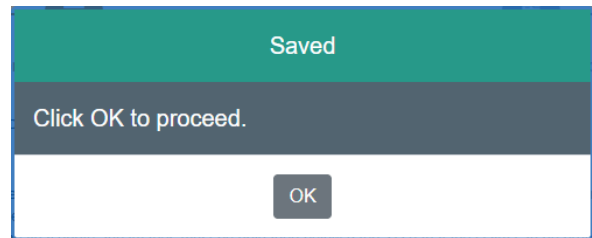
0 / 1   0.000 / 20MB

Save & Submit **4**

A confirmation pop-up window is displayed. Click on the *Yes* button to proceed or click on the *No* button to cancel the submission.

After proceeding, a success pop-up window is displayed. Click on the *OK* button to return to the Repairer Portal.
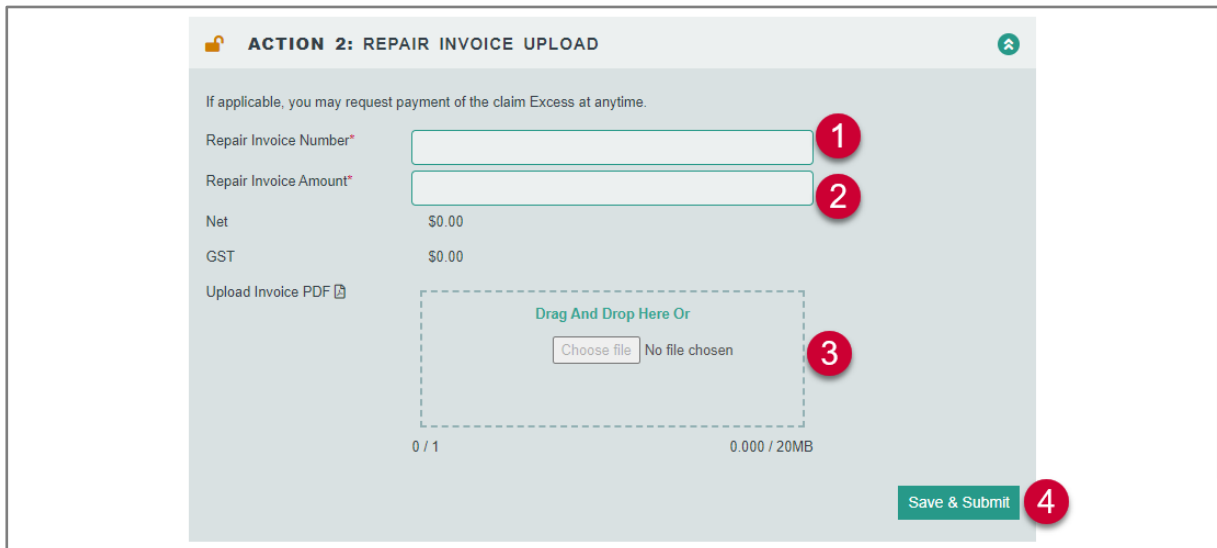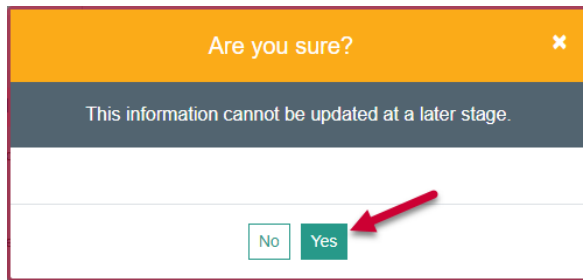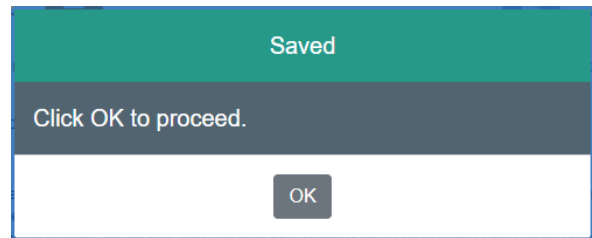
Are you sure? ✕
This information cannot be updated at a later stage.
No   Yes

Saved
Click OK to proceed.
OK

Invoice transactions

The third section on this screen lists the status and details of financial transactions between you and Custom Fleet.

A

B

C

Invoice Transactions

Only the transactions between Custom Fleet and you (the Repairer) are displayed below

A Show 10 ⌄ entries

B Search: [   ]

Inv no	Payment Status	Desc	Date Generated	Amount (ex GST)	Amount (in GST)	Date Paid/allocated
INP834934	Paid by CF	Repair charge	13/10/2020	$1,000	$110	13/10/2020
INP834935	Pending CF	Excess Charge	13/10/2020	$500	$550	
INP834936	Paid by Repairer	Rebate - Repair charge	13/10/2020	-$50.0	-$5.5	13/10/2020
INP834936	Pending Repairer	Rebate - Repair charge	13/10/2020	-$50.0	-$5.5	