Vendor Portal
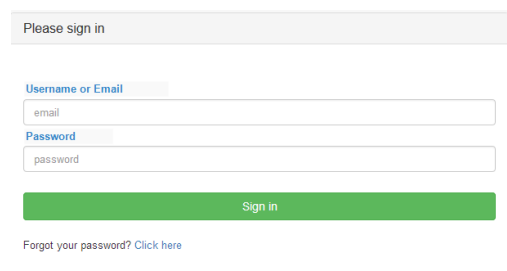# User Manual

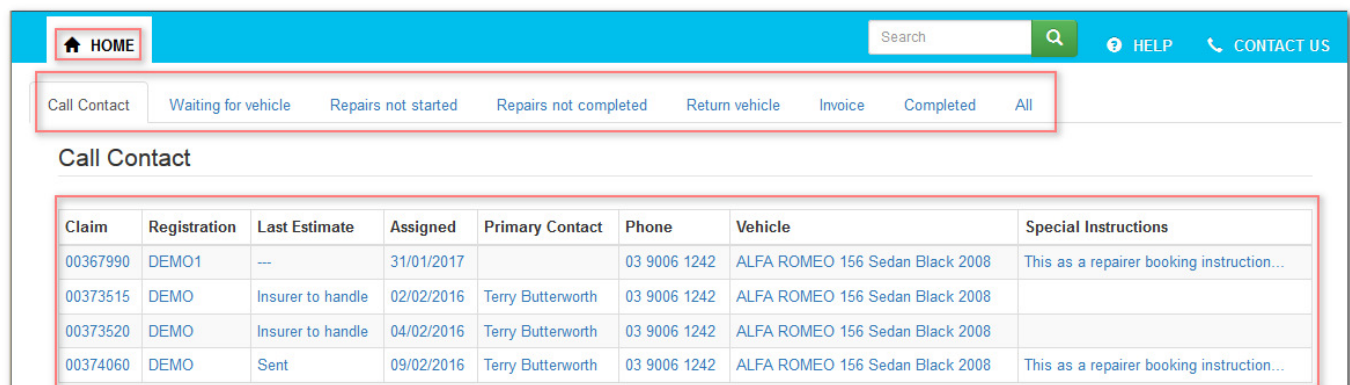2.1

05 December 2017

Log into Vendor portal

- Open the web browser
- Enter the Vendor Portal link in the address bar, or click on your bookmark or link in the booking email
- Enter your user name (i.e. your email) and password and click 'Sign in'

Note: If you don't have login details please contact Innovation Group.

Home Page

- The Home page is the first page you will see after logging into the portal. The Home page is a list of your bookings. You can only view bookings that are assigned to you.

Note: if you access a booking from an email link, you will be prompted to login and then the booking will be opened.

Booking List

Bookings are listed in separate tabs, based on the booking status.

Status:

- ***Call Contact:*** a booking is allocated to you and you are required to contact the client.
  The booking status *changes* when you enter the **Contacted** date within the booking.

- _**Waiting for vehicle:**_ you are waiting for the vehicle to be dropped off at your premises.
  The booking status _changes_ when repairer enters the **In shop** date

- _**Repairs not started:**_ the vehicle is in your workshop but repairs haven't started due to either waiting on the assessment to be completed or waiting on the repair authority.
  The booking status _changes_ when repairer enters the **Repairs started** date.

- _**Repairs not completed:**_ Repairs have started but are not yet completed.
  The booking status _changes_ when you enter the **Repairs completed** date.

- _**Return vehicle**_: repairs are complete and you are waiting for the vehicle to be returned.
  The booking status is _changed_ when you enter the **Picked up/returned** date.

- _**Invoice:**_ repairs have been completed
  The booking status is _changed_ when you upload your invoice for payment.

- _**Completed:**_

- The booking status is _changed_ when after uploading your invoice and you click on the 'Completed' button.

  [👍 Completed] [⇨ Save] [✖ Exit]

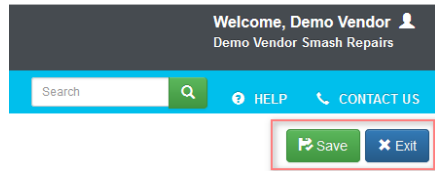- _**All:**_ this tab shows all your bookings irrespective of their status.

**Note**: the status of a booking automatically changes when you enter a date or complete the booking.

Incident date	01/05/2013
Lodged	03/02/2016
Assigned	03/02/2016
Contacted	10/01/2017
In shop	12/01/2017
Repairs started	15/01/2017
Repairs completed	18/01/2017
Picked up/returned	19/01/2017

Saving Your Changes

Whenever you make any changes to a booking you will need to click on the **Save** button to action those changes. This means you can move from tab to tab and make multiple updates before saving any of them, or triggering any actions such as sending SMS's.

If you change your mind and don't want to save your updates, simply click on the **Exit** button. You will be prompted to confirm you wish to exit the booking without saving any of your changes.

Request for Teardown Authority

If a teardown authority is not automatically given on a booking you can request one.

Steps to request for Teardown Authority:
- Click on the booking on which the teardown authority is required
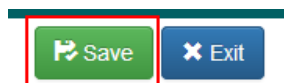
Claim	Registration	Last Estimate	Assigned	Primary Contact	Phone	Vehicle	Special Instructions
00367990	DEMO1	Received	07/04/2016	Terry Butterworth	03 9006 1242	ALFA ROMEO 156 Sedan Black 2008	Pickup and delivery required by driver. Ple

- When the booking is open, click on **Job Details**
- Click on 'Submit teardown request'.

- Click **Save** on top right

Note: Once the Teardown request is submitted, Innovation Group will be notified via email.

Send SMS to Primary Contact

Steps to send an SMS to the primary contact:
- Click on **Send SMS** tab
- Update the **Mobile phone** number as required (a mobile number must be entered to use SMS)
- Select the message to send to the primary contact

Terry Butterworth - primary contact
Save to send

- ● Please contact Repairer Demo, 1 Bowen Cres, Melb, Ph: 1300654447 to arrange repair quote.
- ○ Repairs authorised. Please contact Repairer Demo, 1 Bowen Cres, Melb, Ph: 1300654447 to arrange repairs.
- ○ Please contact Repairer Demo on 1300654447 regarding repairs.
- ○ Repairs on schedule. Contact Repairer Demo on 1300654447 for further information.
- ○ Repairs delayed. Contact Repairer Demo on 1300654447 for further information.
- ○ Ready to be collected from Repairer Demo Ph: 1300654447
- ○ Ready to be collected after <TimeReturn> on <DateReturn> from Repairer Demo Ph: 1300654447
- ○ Please bring your vehicle in for a repair quotation MON-FRI 8-4pm. Repairer Demo, 1 Bowen Cres, Melb, Ph: 1300654447

- Click on **Save** to send the SMS.

Old Damage

List old damage from earlier incidents not included as part of this booking. An email notification will be sent to Innovation Group for follow-up.

Steps to list old damage

- Click on the **Old Damage** tab.
- Enter the information about old or other damages that are not consistent with the current incident description.

List old or other damage not included as part of this claim - notification will be sent to Innovation Group for follow-up

Damage on right panel not consistent with the incident description.

- Click **Action required** if you want Innovation Group to respond
- Click the **Save** button

Steps to Add Estimates & Supplementary:

- Click on the **Estimate** tab from the left navigation
- Add your estimates amounts in column '**Cost (Ex GST)**' – these values will automatically total
- Once done, Click **Save**

Note: Repeat this process for up to 3 supplementary estimates.

	Cost (ex GST)	EST	SUP1	SUP2	SUP3
Remove & replace					
Repair					
Paint					
New parts Supplied parts					
Sublet mechanical					
Sublet other					
Miscellaneous					
TOTAL (ex GST)					
GST					
TOTAL (inc GST)					

Steps to Add physical copy of Estimates & Supplementary (attachment):

- Click on the **Attachments** tab
- Select the type of attachment i.e. **Invoice** or **Images/Estimate**
  (the options will change depending on the status of the booking)
- Click on the **Browse** button
- Select the files you want to attach
- Repeat the above 2 steps if multiple files are being attached
- Once finished attaching all files, click on **Save** button

Upload Images & Invoice

Note: Important information about uploading your repair invoice. You can only select Repair Invoice once the Pickup/Return date has been entered.

Steps to Upload Images & Invoice:

- Click on the **Attachments** tab
- Select the type of attachment i.e. **Invoice** or **Images/Estimate**
  (the options will change depending on the status of the booking)
- Click on the **Browse** button
- Select the files you want to attach
- Repeat the above 2 steps if multiple files are being attached
- Once finished attaching all files, click on **Save** button

Note: All attachments in booking can be viewed in the attachment section within the **Attachments** tab.

Steps to add Pickup/Returned date <mark>BEFORE</mark> uploading Invoice:

- To enter the Pickup/Returned date, click on the Dates tab and enter all the relevant dates

Job Details	Dates	Send SMS	Old Damage	Estimate	Attachments	Notes

Incident date	01/05/2013	Pickup/return vehicle/client?	☐ Pickup
Lodged	01/05/2017		☐ Return
Assigned	04/05/2017		☐ Not applicable
Contacted	01/11/2017 📅		☐ Not offered
In shop	02/11/2017 📅		☐ Estimate at client site
Repairs started	03/11/2017 📅	Loan car provided	📅
Repairs completed	06/11/2017 📅	Estimated working days to repair	▼
Picked up/returned	07/11/2017 📅		

- When you're ready to upload your invoices, open the Repair Job and click on the **Attachments** tab.
- To upload an invoice, you need to select the attachment type Repair invoice. This ensures that a notification that an invoice is sent to Innovation Group.
- Select Repair invoice enter the invoice total and number and click on Select files to select the invoice.

Add Notes

Notes can be added to the system, these can be general booking notes or requests for action by Innovation Group, or for help and additional information. Once notes are added on the booking an email will be sent to Innovation Group.
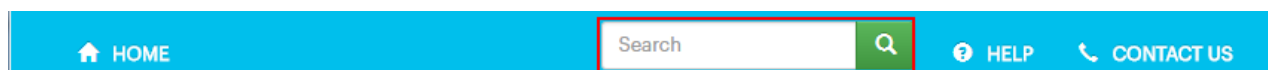
Steps to Add Notes
- Click on the Notes tab
- Enter your comments in the text area
- Click on the **Action Required** 'check box' if you need a response from Innovation Group
- Once done, click Save

Search

You can perform a search using the **search** field from anywhere in the vendor portal. Search on vehicle registration number, claim number, contact name, vehicle description, status etc.

Steps to search in vendor portal:
- Enter the information you are searching for in the **search** field highlighted below

- Click on the Search icon

Search results are displayed in a list format:

Claim	Registration	Status	Last Estimate	Assigned	Primary Contact	Phone	Vehicle	Special Instructions
00374060	DEMO	Call contact	---	09/02/2016		03 9006 1242	ALFA ROMEO 156 Sedan Black 2008	This as a repairer booking instruction...
00295875	DEMO1	Call contact	---	04/10/2013		03 9006 1242	ALFA ROMEO 156 Sedan Black 2008	222222

Profile Page – Change Password

You can change your current password anytime – passwords should not be shared.

Steps to Change Password
- Click on your account name in top right corner
- Click on the Profile
- Click on the Change password tab
- Enter the current password
- Enter the new password
- Confirm the new password
- Click **Submit**