

OwnerCare User Guide

Consistent inspections, constant communication

Congratulations on your decision to use OwnerCare!

OwnerCare is a customer-facing website that provide motorists with the results of their vehicle inspection. The website is simple and convenient for both your advisors and customers. Recommendations display alongside photos, educational videos, and articles, helping your customers understand the needs of their vehicle in a friendly soft-sell approach. Customers can approve recommendations on the site which automatically updates Estimate and generates a confirmation email. Advisors are always one click away via phone or email through the button that connects directly with the advisor.

A valuable part of OwnerCare is its ability to display photos that technicians and advisors have taken of customer's vehicles. Being able to show your customer actual photos of their vehicle, including the recommended component, will greatly increase their understanding and their acceptance of the recommendation. A picture is truly worth a thousand words. Whenever possible, adding a photo of the component showing the recommendation being made will add credibility. Photos can be taken from most Apple products with a camera and connection to the Internet.

OwnerCare is accessible through almost any device with Internet access. Your advisor will text or email the OwnerCare link to your customers and they can access it on a smart phone, tablet, or computer. For customers who remain at your dealership while their vehicle is serviced, it's ideal to present OwnerCare on a dealership tablet. This eliminates the need to print the Action Plan report – saving you money, and paper. Using OwnerCare with your waiting customers also ensures they receive and review all of the additional educational information and any photos that have been taken. Stores have seen significant value and increased understanding and sales from using OwnerCare with their waiting customers. We recommend that you purchase and set up at least one tablet device for your advisors to use in the Customer Lounge.

The key to success with OwnerCare is educating your customers before they receive their link. It is critical to set the expectation at time of write-up that you'll deliver their OwnerCare Vehicle Report via text or email. Work with your advisors to ensure they incorporate OwnerCare into their Service Write-up presentation using the word-tracks that are provided in the Attachment Folder.

OwnerCare is simple for both your customers and you! It will help your advisors save time by eliminating phone calls, comfortably reach your customers, generate additional sales from the inspection and eliminate confusion or misunderstandings by keeping an electronic record of customer approval.

Thanks for using OwnerCare!

-The AutoPoint OwnerCare Team

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OwnerCare Checklist for Success

- Procure tablet for waiting customers
- Perform setups (as described in this guide)
- Train Advisors
- Watch OwnerCare video
- Using OwnerCare link
- Create and practice delivery word-tracks to set customer expectations
- Train Technicians / Advisor / Porters on using photos

OwnerCare Setups

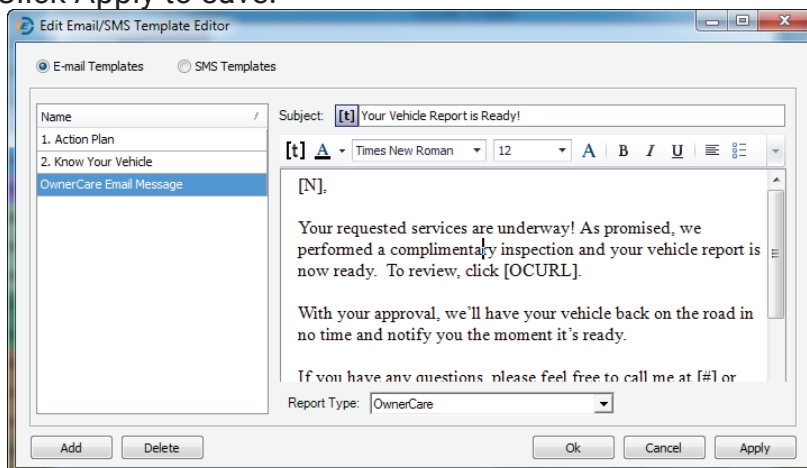
When OwnerCare is activated for your store, you will receive an email and an SMS template by default. If you approve the default templates, no additional setups are required.

◆ Sample templates are available in the Attachment folder.

To customize the default templates:

Email Template

1. Click Tools > Admin Options. Select Email/SMS. Click Add/Edit Templates.
2. Edit Email/SMS Template Editor displays. The E-mail Templates radio button is selected by default.
 - a. To add a new template, click "Add".
 - b. To edit an existing template, highlight the name of the template.
3. Create or customize template(s)
 - a. Subject – Subject of the email
 - b. Text – Type or copy & paste the desired email text. Use the [t] icon to add Merge Fields.
 ◆ The merge field for OwnerCare is [OCURL]. Wherever this field is inserted in the template, the OwnerCare URL will display.
 - c. Report Type – Choose OwnerCare from the drop-down.
4. Click Apply to save.



SMS Template

1. Click Tools > Admin Options. Select Email/SMS. Click Add/Edit Templates.
2. Edit Email/SMS Template Editor displays. Choose SMS Templates radio button.
 - a. To add a new template, click "Add".
 - b. To edit an existing template, highlight the name of the template.
3. Create or customize template(s)
 - a. Text – Type or copy & paste the desired email text. Use the [t] icon to add Merge Fields.
 - ◆ The merge field for OwnerCare is [OCURL]. Wherever this field is inserted in the template, the OwnerCare URL will display.
 - b. Report Type – Choose OwnerCare from the drop-down.
4. Click Apply to save.

Customize OwnerCare Purchasing Conditions

Before final approval of any work, your customers are provided with Purchasing Conditions to clarify and define their approval. If you approve the default purchasing conditions, no additional setups are required.

◆ Default purchasing conditions are included in the Attachment Folder.

To customize the default Purchasing Conditions:

1. Click Tools > Admin Options. Select Estimate. Click Purchasing Conditions.
2. Paste your desired text onto this page.
3. Click OK to save and close.

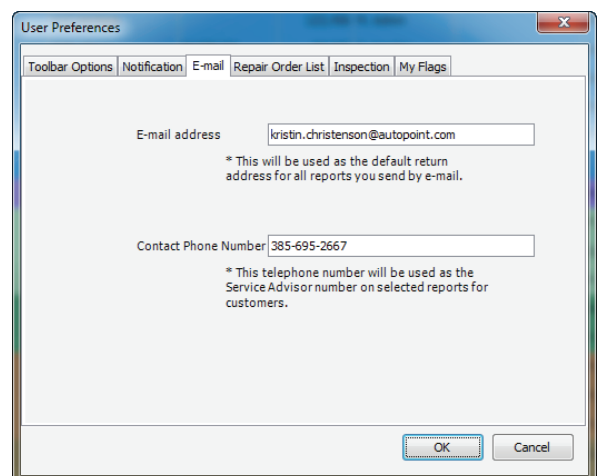
Record Advisor Contact Info

Each advisor should record their email address and direct line. Their contact information will be available via OwnerCare and all emails sent from MultiPoint will come from their personal address. Your customers can contact you via one-click through OwnerCare!

◆ Each Service Advisor should perform this setup.

To record advisor contact information:

1. Click Tools > User Preferences. Choose Email.
2. Enter Email address and contact Phone Number.
3. Click OK to save.



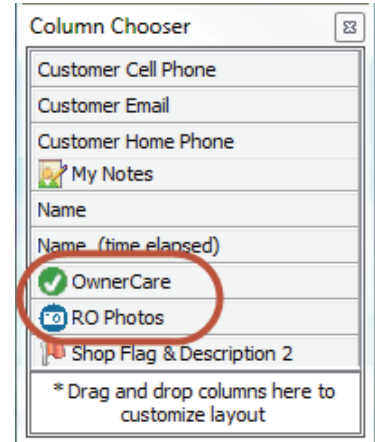
Add Columns to RO list

The RO List Screen in MultiPoint allows users to track their activities with Photos and OwnerCare. Columns for both can be added to the screen.

◆ Each Service Advisor should perform this setup.

To add columns:

1. On the RO List, right-click any column header and choose Column Chooser.
2. Drag and drop the OwnerCare and RO Photos columns onto your RO List.
Two icons will display in the OwnerCare column:
 - a. OwnerCare sent to customer
 - b. Customer has responded through OwnerCare
3. One icon will display in the RO Photos column:
 - a. 1+ photos available for vehicle



Review Expiration Time

◆ By default, OwnerCare links will expire 4 hours after you send them. When the link expires, your customer can still see the recommendations but they can't submit their responses back to MultiPoint unless they phone in.

1. Browse to <https://ownercare.autopoint.com/admin>
2. Log into OwnerCare Board using your assigned credentials.
3. Tap the Gear icon and choose settings.
4. Update the Expiration Time using the drop down or choose Do Not Expire.
5. Tap Save.

Photos Setup

◆ Your OwnerCare Board credentials are pre-assigned. If you forget your credentials, call 877-567-4349 and a Tech Ops representative can help you.

AutoPoint Photos is delivered via the Apple App Store, which means you both download/install it as well as receive all future updates from there.

◆ At this time, Photos is only available on iOS (Apple) Devices. Use an iOS 6+ device with a camera and internet access.

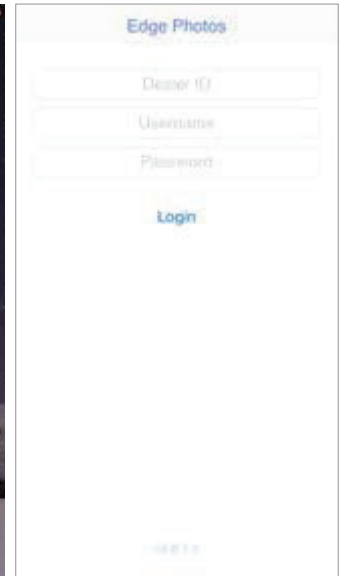
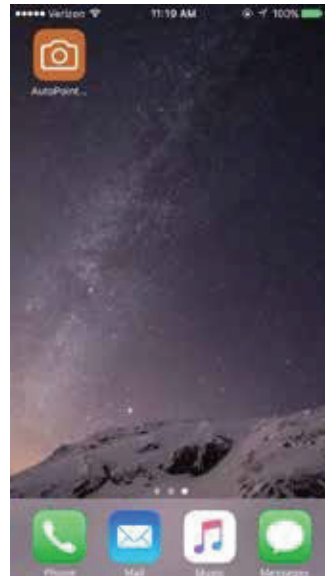
To install photos app:

1. Open the App Store. Search for "AutoPoint Photos".
2. Click [GET] and then [INSTALL].

First Time Setup

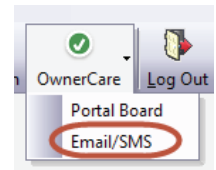
The first time you use the Photos app, you will need to perform a few basic setups. To set up Photos app:

1. Open AutoPoint Photos app on iOS device.
2. Enter credentials
 - a. Dealer ID – MultiPoint Dealer ID
 ♦ Your Dealer ID can be found in MultiPoint by clicking [Help > About MultiPoint](#).
 - b. User Name – MultiPoint user name; this is not case-sensitive.
 - c. Password – MultiPoint password; this is case-sensitive
3. Click Login.



Using OwnerCare

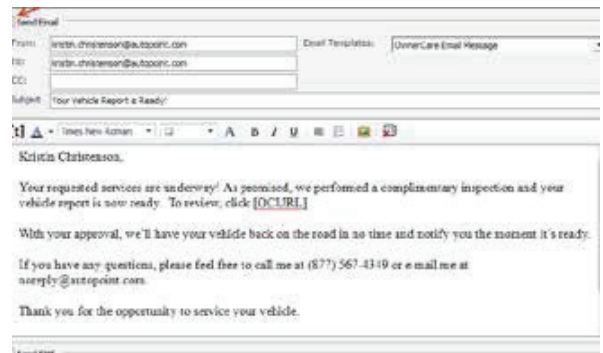
OwnerCare is accessible through almost any device with Internet access. You can text or email the OwnerCare link to your customers and they can access it on a smart phone, tablet, or computer.



♦ Each Service Advisor should be familiar with this step.

To send OwnerCare via Email or SMS:

1. Prepare your Estimate just like usual.
2. Click the OwnerCare button and choose Email/SMS. Send Email is selected by default. Click Send SMS to send via text message.
3. Update message(s) as desired.
4. Click Send.



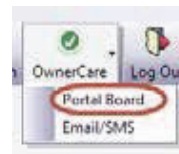
Use OwnerCare Board

For customers who remain at your dealership while their vehicle is serviced, it's ideal to present OwnerCare on a dealership tablet. This eliminates the need to print the Action Plan report – saving you printer toner and paper. Using OwnerCare with your waiting customers also ensures they receive and review all of the additional educational information and any photos that have been taken.

◆ Each Service Advisor should be familiar with this step.

To use OwnerCare Board:

1. Prepare your Estimate just like usual.
2. Click the OwnerCare button and choose Portal Board.
3. On your dealership-owned tablet, browse to <https://ownercare.autopoint.com/admin>
◆ Bookmark or shortcut this URL so you don't have to type it every time.
4. Log into OwnerCare Board using your assigned credentials. Your OwnerCare Board credentials are pre-assigned. If you forget your credentials, call 877-567-4349 and a Tech Ops representative can help you.
5. Tap the tile with customer's name and re-enter your password. OwnerCare will now load.
6. Present the tablet to the waiting customer.



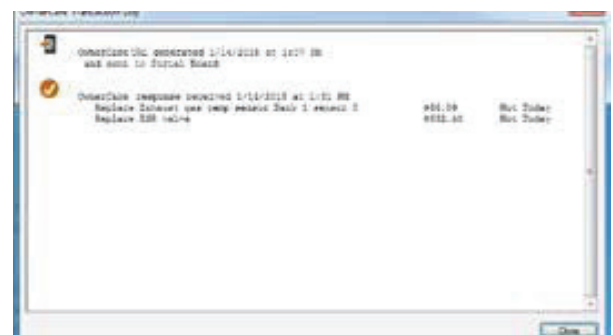
Review Transaction Log

You can review the Transaction Log to see when OwnerCare was sent and the outcome of your customer's interactions with the site.

◆ Each Service Manager and Service Advisor should be familiar with this step.

To use Transaction Log:

1. On the RO List, double-click or in the OwnerCare column.
2. Review OwnerCare Transaction Log.
3. Click Close when finished.



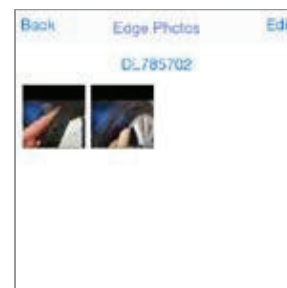
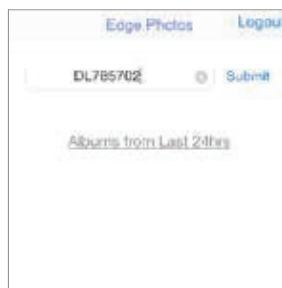
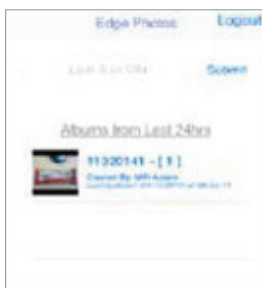
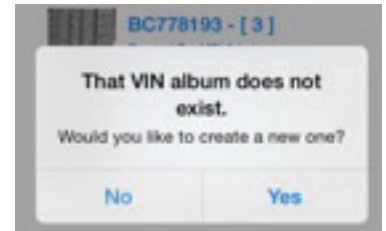
Take Vehicle Photos

Photos can be taken by technicians, advisors, porters or anyone that you want. Some dealerships choose to take photos of all vehicles on the drive to record any nicks and dings, some only take photos of repair items when recommendations are being made.

◇ Each team member who will be taking vehicle photos should be familiar with this step

To take photos:

1. Open AutoPoint Photos app on your iOS device.
2. Input the Last 8 of the VIN and hit Submit.
3. If this is the first time a photo is being taken for that vehicle, click Yes to create a new album.
4. Tap Add Photo at bottom of the screen.
5. Point the camera and take the picture. After taking you will be given the options to Retake or Use Photo.
6. Taking pictures is as simple as pointing the camera and pushing the button. To make the pictures most informative and valuable, here are a few pointers:
 - a. Use a flashlight to add more light.
 - b. Use a pen, finger or some other object to help pin point the area of focus.
 - c. Use captions to indicate what items appear in the photo.
 - d. Discuss and decide upon shop process for when to take photos, i.e. failed items, caution items, body damage, etc.
7. After all photos have been taken click Back. Your photos will be available within MultiPoint within moments. No further work is required.



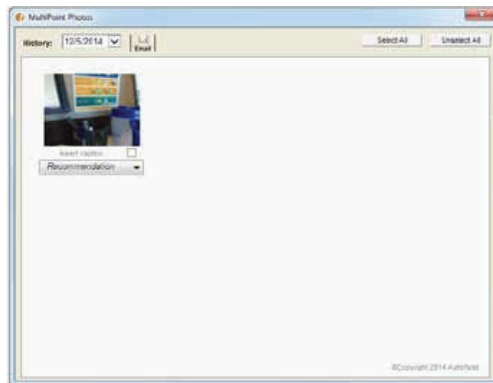
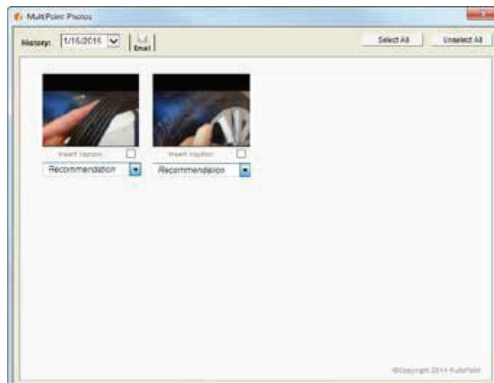
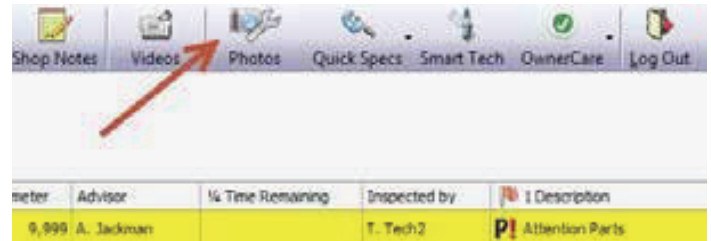
Assign Photos to Recommendation

Any photos that should be included in OwnerCare need to be matched to a recommendation. This step can be completed by technicians or advisors. Inspection Recommendations and Additional Recommendations can be assigned to photos.

◆ Each team member who will be assigning vehicle photos should be familiar with this step.

To assign photos:

1. Click the Photos button.
Photos button is available from the RO List, within the Estimate, or within the Inspection.
2. Using the drop-down list, select the recommendation to associate the photos.
You can associate as many photos to any recommendation as you want.
3. Click [X] to close.



Success with OwnerCare

The successful implementation and on-going results with any new program, process or system starts with management. Someone will need to manage the users to ensure that these new process steps are consistently being delivered. At first, users need to “do it” in order to become comfortable and learn basic applications. Only after repeating the steps over time will they start to become proficient and the benefits of the new offering start to be realized. OwnerCare is no different. AutoPoint offers several ways to successfully manage OwnerCare including sample word-tracks, presentation materials, samples, tools and reports.

Reports

As with any activity in your Service Department, if you can measure it, you can more easily manage it. The Knowledge Bundle now includes OwnerCare usage on all versions of the Service Advisor reports and the Dashboard. Columns measure the percentage of OwnerCare Presented (sent to OwnerCare Board) and sent via Email/SMS message. The report also combines all Action Plan and OwnerCare results to calculate all Presale activities by advisor and RO.

Presale (OwnerCare) Presented %	Presale (OwnerCare) Email/SMS %	Presale (AP or OC) Usage %
23.0 %	40.0 %	63%
17.0 %	23.8 %	40.8 %

The daily RO Detail tab shows when OwnerCare was used and the results it helped achieve, measuring Upsell on the RO and Approved Rec Value from the Inspection.

Presale (OwnerCare) Presented	Presale (OwnerCare) Email/SMS	Presale (AP or OC) Usage	Upsell on ROs	Failed Approved Rec Value from Inspection	Failed Rec Close%
N	1/6/15 6:12 PM	Y	\$1,639.16	\$1,639.16	100%

Word Tracks

Success with OwnerCare starts with making sure advisors are clearly telling customers that an OwnerCare report will be sent via email or text. Suggested word-tracks are below to be personalized and practiced with your advisors.

» Helpful flyers are available in the Attachment folder.

Non-Waiting Customers

Discuss and explain OwnerCare when the customer is dropping off their vehicle. Ensure you know their preferred method of receipt, email or SMS and make sure you have the correct email/number.

“In addition to performing the work we’ve discussed, we will also look into any diagnostic concerns and perform a complementary multi-point inspection. We will prepare a comprehensive OwnerCare vehicle report that will explain any additional work that needs to be done on your vehicle.” [Show them a printed copy of the Flyer located in the Attachments]. “OwnerCare is a website that allows you to receive and review the findings of any diagnostic and inspection items. Is email or text the best way to deliver your OwnerCare report?”

“When you get the link, click on it and walk through the report. If needed, you can approve any services that you’d like us to do today. Your selections will be sent back to me in real-time. If you have any questions you can always give me a call by selecting this Phone icon.” Present OwnerCare card to customer, also found in the Attachment Folder.

Waiting Customers

Approach customer in lounge with tablet once you have located their OwnerCare site. Hand them the tablet as you explain: *“Your OwnerCare vehicle report is ready. I’ve it loaded on this tablet for you; all you need to do is walk through to review and if needed, approve any work you’d like us to do today. Your selections will be sent to me in real-time. If you have any questions I will be at my desk, please come over. I’ll keep an eye on your progress and come pick up the tablet when you’re finished.”* Leave tablet with customer and walk away.