





How To Process a Customer That Has Booked With CarAdvise - Step-by-Step Instructions

CARADVISE IS A FLEET ACCOUNT

- 1 Check customer in through national account ("CarAdvise" or "Car Advise") via 
- 2 Input the Vehicle VIN#
- 3 Submit "Request for Approval" of services via 
- 4 For Pre-made APPOINTMENTS: If no Additional Suggested Services - **BEGIN WORK**
For Drop-In APPOINTMENTS: See Below
- 5 Your Shop Begins the Work For Approved Services **ONLY**

If Your Shop Suggests Additional Services or Drop-In Appointments

- 1 Submit the same ticket in Auto Integrate For "Approval of Additional Services"
- 2 Customer will approve or decline requested services they receive via text.
- 3 Your Shop Begins the Work For Approved Services **ONLY**

If Your Shop Doesn't Use Auto Integrate

- **Check In As National Account**
 - Customer Presents CarAdvise Membership Card Upon Arrival
 - Get VIN & Enter Requested Services in POS
- **Recommendations & Approval**
 - Complimentary Check For Additional Recommended Services
 - Provide Service Pricing & Additional Recommended Services by Calling CarAdvise at 844-923-8473
- **Authorization**
 - CarAdvise Customer Agent will approve services via phone
- **Perform Work**
 - Approved Services Only
- **Finalizing the Order**
 - Complete approved services
 - Close order
 - Call CarAdvise at 844-923-8473 for payment unless billed as a national account

