ATMS GEN2.0 Counter Guide

The ATMS GEN2.0 Counter Guide is a reference intended to help new users with common software functions including opening and closing agreements, booking appointments, managing fleet, and more.

Logging In

https://cirro.tsdweb.com

Save the link as a favorite to easily access TSD's web-based software. You will need to enter your TSD Number, User Name, and Password.

Online Training Tools

Interactive Online Tutorials

Navigation from your Home screen: TUTORIAL OR TRAINING

TSD offers a suite of training resources to help you become an expert at setting up and using ATMS GEN2.0, and how to take advantage of the application's key features to streamline and improve your business.

Click TUTORIAL to open a list of applicable tutorials pertaining to your current screen, or click TRAINING from the top menu to view all available training resources, including:

- ***Tutorials*: Learn the How's.** These are self-guided training courses contains multiple topics with how-to videos, written walkthroughs, and practice software simulations that cover key setups and usage of the application.
- ***TSD University*: Learn the 'Why's.** TSD University consists of short videos led by TSD experts to help you learn why key features benefit your business. These are broken down by level of difficulty (Bachelor's, Master's, and Doctorate), with filters on the left panel, so you can choose what works for you.

Online Help

Navigation from your Home screen: ? OR HELP

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The ATMS GEN2.0 Online Help offers walkthroughs, FAQs, Release Notes, and best practices to help you make the most of the application. On each page of the application, you'll find a Help icon ( ) to pull up the Help topic relating to that page.

Important information is found in the Frequently Asked Questions (FAQs) topic, accessible from anywhere using the FAQ icon. You may also click any of the books on the top to drill-down for more information; each book serves like a chapter in a user manual.

Creating Appointments

Navigation from your Home screen: + > **New Appointment** OR NEW APPOINTMENT from customer search results.

Create appointments to have a clear picture of expected fleet demand and to expedite your customers through the agreement process when they arrive for their vehicle.

Create a new appointment

> **Note:** The total number of appointments that can be booked on a single Checkout Date is subject to your location's Daily Appointment Cap.

1. For new customers, click the plus icon (+) and select New Appointment. Or, pull up an existing customer record on the Customers tab and click NEW APPOINTMENT.
2. Select the type of appointment (e.g., Loaner or Rental), if applicable. This will determine the type of agreement opened from the appointment and the rates available on the appointment, if applicable.
3. Enter or verify the required customer information, marked by red asterisks (*). Click CONTINUE.
4. Enter or verify any required repair order information, marked by red asterisks (*).
5. (Optional.) Add Delivery and Collection. For locations with Delivery and Collection integration, you can add Delivery and Collection address information. See "Delivery and Collection with TSD".
6. Verify the Checkout Date and select a Return Date of no more than 29 days into the future.
7. (Optional.) (Required for Rental appointments) Select a rate, if necessary.

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If Enable Rates Charges is turned on for this type of agreement in the Agreement Types setting and your location has rates set up for this type of agreement (see "Rates, Fuel Charges, & Fees Setup"), you can select a Rate Code and Model Group, if necessary, to view the rate that will be applied, based on the agreement length. See "Rates, Charges, Fees, and Taxes on Appointments & Agreements" for more information.

8. (Optional.) Review charges and fees, if applicable. A Charges grid is displayed with your rates, if applicable, as well as fuel charges, mileage charges, auto-applied fees, surcharges, and taxes. You can add a billing company to the agreement via the ADD SPLIT INVOICE button, as well as edit charge amounts and add or remove fees, depending on your employee role permissions. See "Rates, Charges, Fees, and Taxes on Appointments & Agreements" in the full ATMS GEN2.0 Online Help for more information.
9. (Optional.) Add or change a credit card, if applicable. If your location uses integrated Credit Card Processing, you can add or change a credit card so this information will carry over onto the agreement.
10. (Optional.) Assign a unit or model from your fleet.

> **Note:** Units are checked for overlaps in availability and other criteria, such as Hard Hold status and recalls. See "Unit Availability & Alerts" in the full ATMS GEN2.0 Online Help for more information.

    a. Click SELECT UNIT to pull up a list of available units.
    b. Type the full Unit Number, or enter part of the Unit Number and/or select a Model to filter and select from the list.

    TIP If you type the Unit Number of a unit that is assigned to another agreement at your location, you may be able to perform a Quick Return for that agreement, See "Perform a Quick Return" in the full ATMS GEN2.0 Online Help for more information.

    c. After you assign a unit, a REMOVE button becomes available for you to remove the assigned unit.
11. Click SAVE.

TIP Turn on an Appointment Booked alert, so you can be notified when an appointment is created. See "Alerts Panel" in the full ATMS GEN2.0 Online Help for more information.

Expedited Appointments

ATMS GEN2.0 offers a way for your customers to speed up their experience by remotely accessing their appointments and updating information in advance.

When your location is configured to use automatic texting or emailing and the Expedited Appointments feature, an automatic text or email is sent to the customer when the appointment is created. The text or email contains a link to an online version of the appointment that customer can access to update his or her information. See "Expedited Appointments" in the full ATMS GEN2.0 Online Help for more information.

Opening Agreements

Navigation from your Home screen: + > **New Agreement** OR NEW AGREEMENT from appointment or customer search results.

Open an agreement

1. Search for a customer or appointment and click NEW AGREEMENT, or create a walkup agreement by clicking (+) in the bottom-right corner of the Home page and selecting New Agreement.
2. Select the type of agreement (e.g., Loaner), if applicable.
3. Enter or verify the required information, marked by red asterisks (*). See "Agreement Options" in the full ATMS GEN2.0 Online Help for additional options and requirements.

> **Note:** See "Customer Criteria and Alerts" for information on customer eligibility requirements.

4. Select Checkout and Return Dates, if different than the default.
5. (Required for Rental agreements.) Select a rate, if necessary.

   If Enable Rates Charges is turned on for this type of agreement in the Agreement Types setting and your location has rates set up for this type of agreement (see "Rates, Fuel Charges, & Fees Setup"), you can select a Rate Code and Model Group, if necessary, to view the rate that will be applied, based on the agreement length. See "Rates, Charges, Fees, and Taxes on Appointments & Agreements" for more information.

6. (Optional.) Review and edit charges and fees, if applicable.

   A Charges grid is displayed with your rates, if applicable, as well as fuel charges, mileage charges, auto-applied fees, surcharges, and taxes. You can add a billing company to the agreement via the ADD SPLIT INVOICE button, as well as edit charge amounts and add or remove fees, depending on your employee role permissions. See "Rates, Charges, Fees, and Taxes on Appointments & Agreements" in the full ATMS GEN2.0 Online Help for more information.

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7. (Locations with Credit Card Processing and/or Toll Processing.) Add or change a credit card and take a pre-authorization.

> **Note:** For locations with the Credit Card Capture Required at Open Agreement management setting turned on, capturing a credit card is required to complete the open agreement process. For employee roles with the *Allow Override Credit Card Capture* permission, capturing a card is optional.

If your location uses integrated credit card processing for agreement charges and/or for tolls, you can add or update a credit card. If your location has pre-authorizations enabled via the Credit Card Required at Open Agreement setting, then the card will be pre-authorized when the agreement is opened. See "Credit Card Processing" in the full ATMS GEN2.0 Online Help for more information.

8. (Locations with Toll Processing.) Bill for toll violations incurred on the agreement.

For locations with automated Toll Processing, you can have your customers automatically billed for any toll charges incurred on the agreement, or you can choose to have them billed to your location.

   1. **Select Bill Toll Charges.** On the agreement (i.e., during open), the Bill Toll Charges toggle is selected for you, by default. If you leave this selected, the customer's credit card associated with the agreement will automatically be charged for any tolls. If you clear the Bill Toll Charges toggle, tolls will be charged to your location, instead of the customer. Note that toll charges may take up to two (2) weeks after an agreement is closed to display.
   2. **Proceed with your normal agreement process.** Note that if your location has pre-authorizations enabled via the Credit Card Required at Open Agreement setting, then the card will be pre-authorized an additional amount for possible future toll charges. See "Credit Card Pre-Authorizations" for more information.

9. Assign a unit or pend the agreement, so you can assign one later.

   - To assign a unit: See "Assign a unit to an agreement" in the full ATMS GEN2.0 Online Help for more information.
   - To pend the agreement: Click PEND AGREEMENT. See "Pend the agreement" for more information.

> **Note:** After you assign a unit, your Rate Code and Model Group selections are unchanged, even if the unit is not within the selected Model Group.

10. (Optional.) Add any notes about the agreement in the Agreement Notes text box,
11. (Optional.) Upload an agreement attachment file to add an important communication or document to the agreement. See "Upload an agreement attachment" for more information.

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12. After all required fields are filled in, select an agreement form and complete the open agreement process by doing the following:

    - Collect a remote signature through email or text message (Contactless Agreement). Make sure the customer's phone is filled in and Text Allowed is enabled (for texting), or that the customer's email address is filled in (for emailing), and click TEXT or EMAIL. See "Contactless Agreements" for more information.
    - Send the agreement to your Delivery and Collection provider's driver app for a signature: If Delivery and Collection integration with a third party partner is available for your location, click SEND DELIVERY AGREEMENT to send the agreement form to your Delivery and Collection provider's driver app to update the fuel and mileage, as applicable, and obtain a customer signature. The agreement will have a status of *Incomplete* until the provider returns the signed agreement form. See "Delivery and Collection: Partner-Provided" in the full ATMS GEN2.0 Online Help for more information.
    - Print a hard copy and collect a signature. Select the "Open Agreement without electronic signature" check box, then click OPEN AND PRINT to save the open agreement. Print the agreement and capture a signature on a hard copy. If your location uses automatic texts or emails, a copy of the unsigned agreement form PDF is texted or emailed to the customer, as long as the customer has opted to receive texts or emails, respectively. See "Automatic Text Messaging and Emailing" for more information.
    - Capture an electronic signature.

    If Signature Capture is available for your location, complete the open agreement by collecting an electronic signature as follows:

    a. Click OPEN AND SIGN to save the open agreement.

    b. On the agreement form, request a digital signature or acknowledgment (if applicable) from the customer in each required signing area.

    > **Note:** Abandoning the digital signature capture process (by tapping CANCEL) displays the following message: "You are attempting to leave the agreement signature, any captured signatures will not be saved. Do you want to continue?" Click YES to proceed without saving the signature or NO to remain on the signature form screen.

- If your form is set up with signature check boxes, tapping or adds a check mark () in place of a signature. The acknowledgment is displayed on the email and printed versions of the form.
- If your form requires the customer to sign on-screen, tapping or displays an enlarged signature box with ACCEPT and CLEAR buttons.
- If an additional driver is present on the agreement, a signature area is available for the driver to sign.

c. When all required fields are signed or acknowledged, save the signed form to the agreement by clicking SAVE (to save without printing) or SAVE & PRINT (to save and open a PDF of the form to print).

d. If your location uses automatic texts or emails, a copy of the signed agreement form PDF is texted or emailed to the customer, as long as the customer has opted to receive texts or emails, respectively. See "Automatic Text Messaging and Emailing" for more information.

13. After the agreement is opened, you are returned to the View Agreement screen. See "View and edit an agreement" in the full ATMS GEN2.0 Online Help for options on what actions you can take when viewing an open agreement.

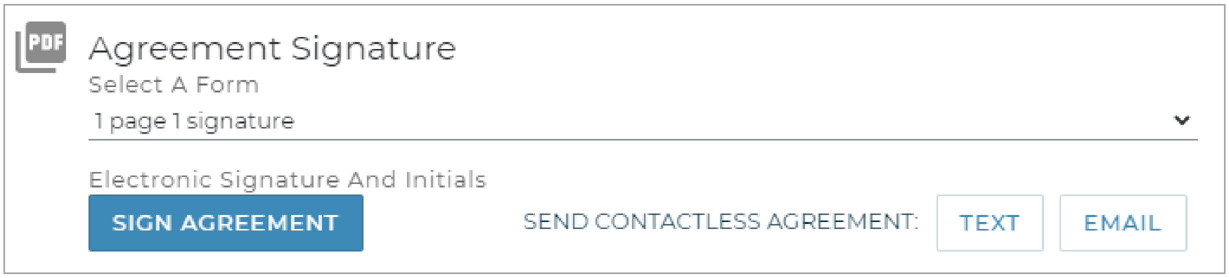
Contactless Agreements

Implement a completely contactless open agreement process on the web or iOS mobile app by obtaining a signature from the customer remotely, through a text message or email that contains a link to a signable PDF.

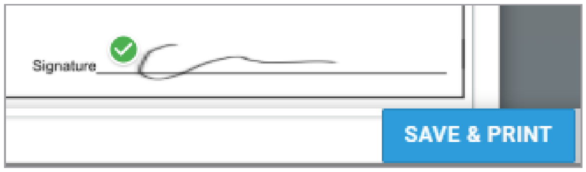
Collect a signature through text or email (open agreement)

> **Note:** You cannot collect a signature through text or email if the agreement is marked for Delivery and Collection *with a partner*. In this case, you will send the agreement to your provider's driver app to obtain a signature and complete the agreement process. See "Delivery and Collection With a Partner" for more information.

1. When opening an agreement or viewing an opened agreement, make sure the customer's phone is filled in and Text Allowed is enabled (for texting), or that the customer's email address is filled in (for emailing).
2. Select an agreement form PDF and click TEXT or EMAIL.



3. On the Send Contactless Agreement dialog, confirm the agreement form and email address or phone number, then click SEND (or **OPEN AND SEND**, on the mobile app) to complete the agreement process and send the customer a link to the signable agreement form PDF.
4. After the text or email is sent, the customer will have 24 hours in which to access and sign the document in a web browser or Safari on a mobile device. (The contract can only be signed once using this link, but if it expires or you make any changes to the agreement, you can send another link from the View Agreement screen.)



5. After the customer signs and submits the form by clicking SAVE AND PRINT, a copy of the signed agreement PDF is displayed in the customer's browser and the signed agreement PDF is saved to the agreement. If a text was originally sent, then a follow-up text is sent to the customer, containing a URL to the signed agreement form PDF. (This URL expires after the agreement is closed, so customers can access the signed agreement through the duration of the rental.) Similarly, if an email was originally sent, then a follow-up email is sent, containing the signed agreement form PDF as an attachment.
6. (Optional.) You can view the signed agreement, or send another link to signable PDF form, from the View Agreement screen. See "ATMS GEN2.0 Counter Guide".

TIP Turn on a Contactless Signature Captured alert, so you can be notified when a customer signs a contactless agreement. See "Alerts Panel, Email Alerts & Push Notifications" in the full ATMS GEN2.0 Online Help for more information.

When a customer submits a signed loaner agreement form, a "Form Signed" event is logged in the agreement's History. See "Agreement History" for more information.

Closing Agreements

Navigation from your Home screen: CLOSE from agreement search results.

It is important to close out your agreements with an accurate date, time, mileage, and fuel level.

Close an agreement

1. Find the agreement, and click CLOSE. If already viewing the agreement, click **Close Agreement**.
2. Update the Miles In and Fuel Level In or Battery Level In, if necessary, and any other required information, marked by red asterisks (*). Additional options:
    - Perform a unit inspection. If applicable based on your location settings, inspect the unit and add or edit any damage, log photos or notes of its current condition without damage, or continue without changes.See "Unit Inspections" in the full ATMS GEN2.0 Online Help for more information.
    - Edit charges and fees, if applicable. When closing an agreement, you can edit the rate or fuel charges, add or edit fees, add or edit a split invoice between a company and a customer, and more. See "Rates, Charges, Fees, and Taxes on Appointments & Agreements" for more information.
    - Add or change a credit card, bill for toll charges (if applicable), and process a payment. See "Credit Card and Payment Processing Integration" for more information.

> **Note:** If TSD Toll Connect (toll processing) is enabled for the location, an email address is also required to close the agreement.

3. Click CLOSE. The following occurs:
    - If your location uses automatic texts or emails, a copy of the most recent signed or unsigned agreement form PDF is texted or emailed to the customer, as long as the customer has opted to receive texts or emails, respectively. See "Automatic Text Messaging and Emailing" for more information.
    - If maintenance is scheduled for the unit, an alert is displayed. See "Maintenance" for more information.
    - The signed agreement form PDF is available for printing. On the Agreement Hub, search for the closed agreement and click PRINT to open the signed agreement form PDF in a separate browser tab for you to print.

Email the agreement

If your location is set up for automatic emails, an email is automatically sent to the customer when an appointment is created or when an agreement is opened or closed. You can also manually send an email to the customer by clicking the **Email Agreement** button on the side panel of an opened or closed

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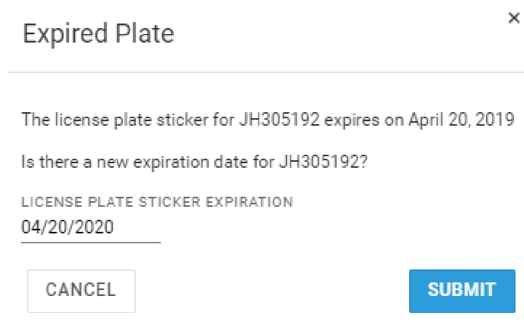
agreement. By default, the email address is the one on the customer's record; you can choose to enter a different email address without changing the customer's record. Click SEND.

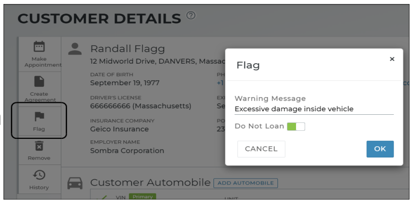
Alerts and Warnings

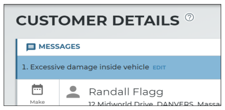
- **Plate and sticker expiration checks:** ATMS GEN2.0 checks the license plate and inspection sticker expiration dates on returning vehicles. If the date has passed, or if it falls before the agreement's Return Date, a message is displayed, including the number of days remaining, if applicable.
- **Daily Odometer Limit:** If you have set up the Daily Odometer Limit management setting in Admin Setup and the customer's agreement has exceeded that number of miles per day, a notification will be displayed.



Viewing customer notes and warning messages

A **MESSAGES** section may be displayed at the top of a customer record, unit record, appointment, or agreement, if any warning messages have been attached to a customer, or if any unit alerts are present. See "Unit Availability & Alerts" in the full ATMS GEN2.0 Online Help for more information.





You can attach a warning message to a customer record via the **Flag** button on the side panel of a customer record. When flagging a customer, you can prevent agreements from being opened for this customer using the Do Not Loan option.

Customer-related messages can only be edited or deleted from the customer record (an EDIT button is available next to the message.)

You can use Customer Notes to keep track of customer conversations and significant developments; these notes carry over on appointments and agreements and are highlighted when notes are present. For example, you may want to note when a customer was informed of a specific policy or vehicle preferences for a future visit.

> **Note:** To protect customers' sensitive data and ensure it is properly encrypted, you cannot save credit card numbers in notes and other text fields.

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Searching for Agreements

Navigation from your Home screen: Agreement

Find agreement records easily using the application's search function; use the search filters to find any agreement status.

Search for agreements

TIP When searching for records that include a special character (such as a colon or hyphen), use quotation marks for an exact search or do a partial search. For example, to find a record with an associated Unit Number of TSD1-4, try searching TSD1 for a partial search, or entering "TSD1-4" for an exact search.

Note: Your search results contain records from all locations to which you have viewership. If you select a record from another location, a message is displayed letting you know that the record exists at another location and you're provided the option to automatically switch to that location to view the record.

TIP Use the Search Open tab for the quickest way to view a list of open agreements, or click a status tile on the Agreement Operations dashboard.

1. Enter search criteria on the Agreement Hub. For example, you can search by any of the following: Agreement Number, assigned unit, RO Number, or a customer's name, driver's license number, or Customer VIN (partial or full) of a customer automobile on file.
2. (Optional.) Select from the Filters list to narrow your search by category: Agreement Number, Repair Order, Unit Number, License Plate, VIN, or Customer Phone Number. By default, all categories are included. So, if you want to search for an agreement associated with Unit 'U007', enter U007 in the search bar, then select Unit Number from the list.
3. Click Search. Up to 100 results are shown, by default, but you can choose to display 10, 25, or 50 entries, as well as navigate to the next page of results. Results are sorted by the most recent open agreements, followed by other groups of agreement statuses, sorted in descending order by Checkout Date.
4. (Optional.) Use search filters to narrow results. Click the check boxes in the following search filters to narrow results:
    - Agreement Type search filters
    - Status search filters

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- Tolls and Violation search filter
- Closed Between date range search filter for closed agreements

What can I do from search results?

Depending on the agreement's status, you can do the following from your Agreement Hub search results:

- View your results as a table ( ) or List ( ), and set as your default view. You can view search results in a list ( ) or as a condensed, sortable table ( ) using the tabs at the top of your results. Save your viewing preference using the Default View check box. In both views, you can click a result to view the record. (You can return to your previous search results by clicking the back button on your browser.)
- Export your search results to a CSV or PDF. Export your search results to a CSV or PDF. In both List view and Table view, you can click the CSV button (CSV) to export the list to a CSV spreadsheet, and the PDF button (PDF) to export your results to a PDF. See "ATMS GEN2.0 Counter Guide" for more information. See "Export agreement search results to a CSV or PDF" for more information.
- View or edit an agreement. Click a record to view it and edit information. See "View and edit an agreement". (You can return to your same search results from the View Agreement screen by clicking the back button on your browser.)
- Close or Close Pend an agreement. See "ATMS GEN2.0 Counter Guide" and "Close Pend an agreement" for more information.
- Print a signed agreement form (Loyalty and Subscription agreements only). A PRINT button is available in search results for closed agreements. This opens the signed agreement PDF in a separate browser tab for you to print. See "Loyalty and Subscription Agreements" for more information.
- Continue an agreement that has a Unit Pending or Incomplete status. Depending on whether your location has the Enable Open Pending Agreements setting turned on, a **Continue** button is available to continue the agreement process.
- View the assigned unit's location on a map with Connected Car Integration (with GPS). If the assigned unit's Owning Location has Connected Car Integration with GPS location allowed and your employee role has the Access To Map permission, click MAP to view the

unit’s current physical location on a map. See "View the physical location of Connected Cars (with GPS)" for more information.

Managing Fleet

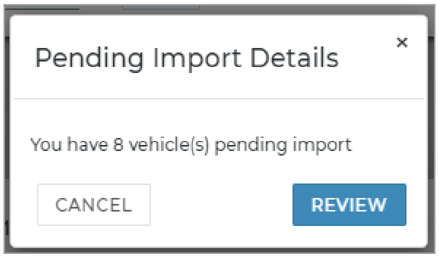
Navigation from your Home screen: Fleet

You can use the Fleet Hub to add or remove units, view and edit unit information (including changing a unit's location or status), view a unit's history.

Automated fleet import

If your location uses automated Fleet Import, there is no need to manually add units to ATMS GEN2.0. The Fleet Import process automates your in-fleeting process, leveraging unit information provided by your OEM to create new unit records during the Retail Delivery Report (RDR) process. You can:

1. View a list of Pending Import Details units; a prompt is displayed at log-in if there is at least one unit awaiting import. You can also view these units in your Fleet Operations dashboard.
2. Click IMPORT, then enter as much information as possible, based on the VIN, on the Import From Feed dialog.
3. Click IMPORT.



View and edit unit information

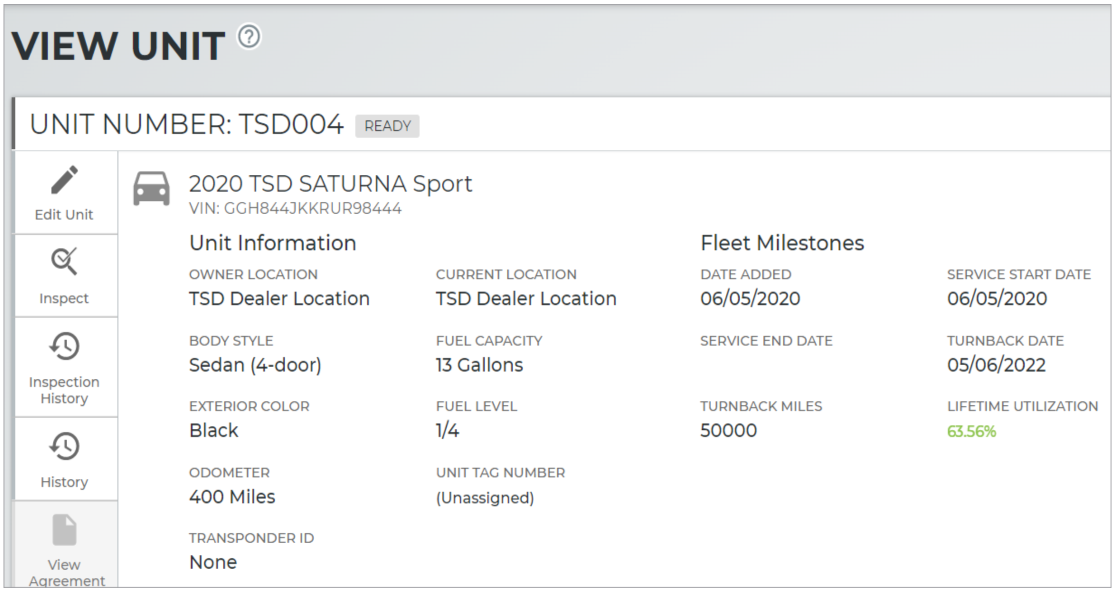
Your employee role must have the Edit Fleet permission to edit unit records, the Fleet Status permission to change a unit's status, and the Remove From Fleet permission to remove a unit from the fleet. See "Roles & Permissions (Admin Setup)" in the full ATMS GEN2.0 Online Help for more information.

1. **Search for the unit record, if necessary.** Click the record from your search results to view it.
2. **Edit a unit record.** Click EDIT from your search results, or view the record and click **Edit Unit** from the side panel. Make your changes, and click UPDATE. Some fields may be unavailable for editing. See "ATMS GEN2.0 Counter Guide" for information on fields and options on this page.

   Note: Updating a unit record does not update the information on any associated agreements.

3. **Options while viewing a unit record.** Depending on the unit's status, you can do the following when viewing the unit record:

- Edit a unit record. Click **Edit Unit** from the side panel. To edit maintenance information, click the edit button ( ) on the section you want to edit.
- Inspect a unit. Click **Inspect** from the side panel. See "Inspections & Damage" in the full ATMS GEN2.0 Online Help for more information.
- View inspection history. Click **Inspection History** from the side panel. See "Inspections & Damage" in the full ATMS GEN2.0 Online Help for more information.
- View unit record history (events). Click **History** from the side panel. See "History (Event Logging)" in the full ATMS GEN2.0 Online Help for more information.
- View an associated agreement. If the unit is *In Use*, certain agreement details, such as Agreement Number and Expected Return Date, are displayed on the unit record; click **View Agreement** on the side panel to view the agreement record.
- Print a unit QR code. Generate and print the QR code and barcode associated with the unit's VIN. Click **Print QR Code** on the side panel of a unit record. See "Print a QR Code" for more information
- View or edit messages, if applicable. Click MESSAGES at the top of the unit record to view unit alerts. See "Unit Availability & Alerts" in the full ATMS GEN2.0 Online Help for more information on unit alerts.
- View a map of the unit's location with Connected Car Integration (with GPS). If the unit's Owning Location has Connected Car Integration with GPS location allowed and your employee role has the Access To Map permission, click **Map** on the side panel to view the unit’s current physical location on a map. See "View the physical location of Connected Cars (with GPS)" in the Connected Car Integration topic of the Online Help for more information.
- View recall information. If the unit is associated with one or more safety recalls by manufacturer, a Recall tag is present. Depending on your manufacturer, the recalled unit may be automatically grounded (i.e., set to a *Recall* status, if not *In Use*), to ensure no driver uses it until the recall campaign is completed) or your location may need to manually change the status of these units to *Recall*, or use the Hard Hold option for units *In Use*. See "Vehicle Safety Recalls" for more information.



Record walk-around unit inspection information

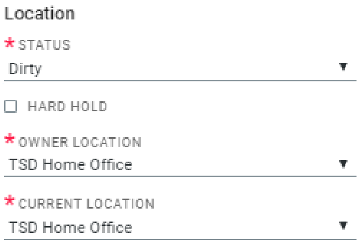
An **Inspect** button is available on the side panel of a unit record for you to note vehicle inspection results. See "Inspections & Damage" in the full ATMS GEN2.0 Online Help for more information.

VIN validation

When adding a new unit to the fleet, type a VIN and press Tab for the unit to be matched with a model in your system; ATMS GEN2.0 fills in certain fields, which you can edit, if necessary.

Change a unit's status or location

Use the Status field in the unit record to change a unit's status, and the Owner Location and Current Location fields to change a unit's location.



Perform a unit inspection and add damage

Perform a walkaround inspection and mark any areas of unit damage while viewing a unit record, exchanging a unit on an agreement, and, depending on your management settings in Admin Setup, during the open or close agreement process. For transparency's sake, the filled-in damage diagram is included on the customer's printed or emailed form. Contact the TSD Forms Department at support@tsdweb.com for information on how to customize your form.

1. If inspecting a unit outside of an agreement or exchange, search for the unit record in the Fleet Hub and click INSPECT. If already viewing the unit record, click **Inspect** from the side panel.

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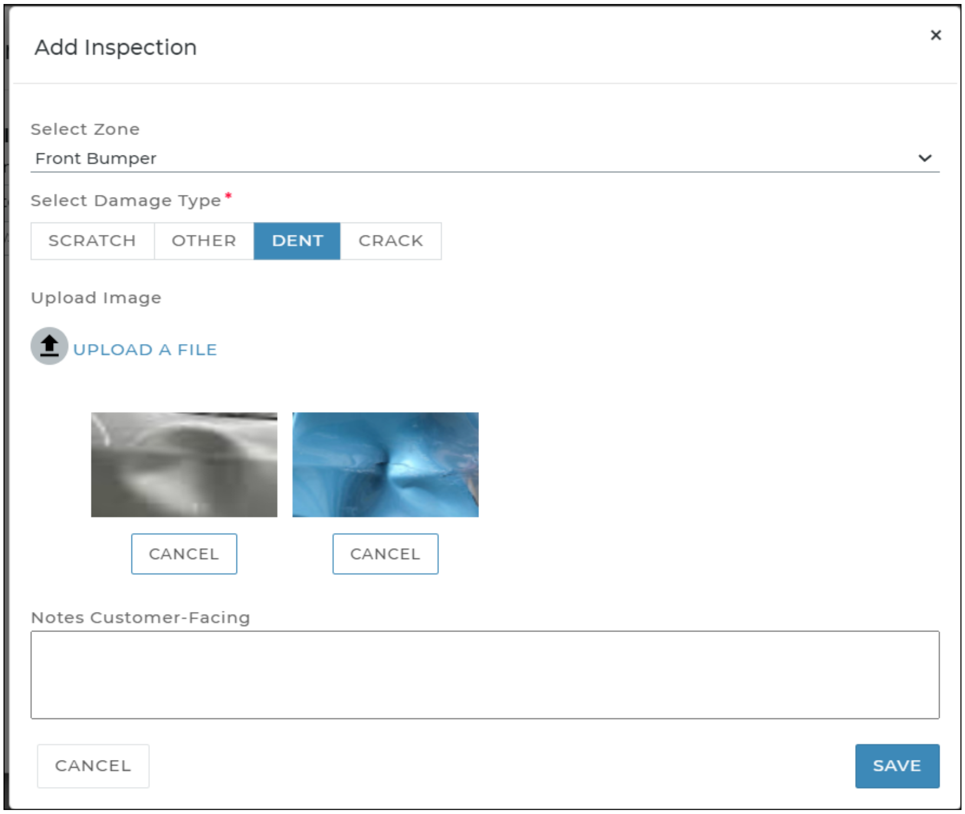
> **Note:** You cannot update miles or fuel level when performing an inspection outside of an agreement.

2. Select a location of damage on the diagram, or click ADD DAMAGE. Existing damage records, if present, are indicated on the diagram by an orange icon ( ).
3. Select or confirm the area of damage (Zone) and select a Damage Type.
4. Indicate the severity of the damage (general or chargeable).
5. (Optional.) Upload photos of the damage. Drag and drop an image or click UPLOAD A FILE to select one. You can upload up to 12 photos. If you want to re-upload an image, just click CANCEL and upload it again.
6. (Optional.) Add notes. Add any additional customer-facing notes about the inspection.
7. Click SAVE. Verify the information and click CLOSE to return the unit record, unit search results, or to the agreement or exchange, as applicable. A damage diagram is included on the customer's printed or emailed form, with areas of damage marked with an 'X', if applicable.



Key Fields and Sections of a Unit Record

Field	Description
Hard Hold	This check box prevents a unit of any status from being assigned to a customer. When putting a unit on hard hold, a Hard Hold Reason is also required. Browse the Fleet Hub glossary in the full ATMS GEN2.0 Online Help for more information on these fields.
Messages	If any unit alerts apply to a unit, such as an expired license plate, an expandable **MESSAGES** section is available at the top of a unit record, appointment, or agreement. See "Unit Availability & Alerts" in the full ATMS GEN2.0 Online Help for more information.
Unit Inspection	This section on a unit record displays any the number of areas of damage marked during an inspection. Click the edit button ( ) to add or manage inspection information.
Enable Connected Car	For locations with TSD Telematics, if a unit's Owner Location has Connected Car integration this field available while editing the unit record to turn on Connected Car for the unit. See "TSD Telematics" in the full ATMS GEN2.0 Online Help for more information.

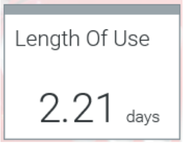
Live Operational & Performance Data

Daily Activity

Navigation from your Home screen: Search Open > or

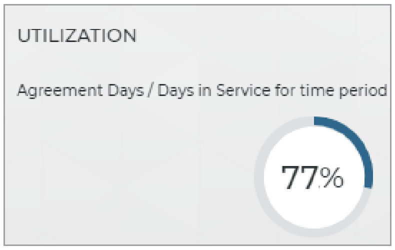
Your Operations and Performance dashboards offers status breakdowns for appointments, agreements, and fleet, as well as important metrics, such as Utilization, Length of Use (LOU), Turn Rate, and more. See "Operations and Performance Overview" in the full ATMS GEN2.0 Online Help for more information.

Length of Use (LOU)



Your Performance dashboard ( ) includes your Length of Use (LOU), in days, or the average length of agreements opened at the location that were closed in the last 30 days. In other words, this is the total number of days on closed agreements divided by the total number of closed agreements. (Days from Third Party Agreements are excluded.)

Fleet Utilization



Your Fleet Performance dashboard ( ) includes your utilization percentage. Fleet utilization is an important metric for you to monitor weekly and monthly in order to help determine your business's efficiency, the need to add to or remove from your fleet, and to properly rotate units.

Fleet Calculator

Navigation from your Home screen: Search Open or Fleet > > FLEET CALCULATOR

The FLEET CALCULATOR on the Fleet Performance dashboard helps you gain a thorough understanding of your operation's efficiency over the past three (3) months; it shows your length of use (LOU), utilization, turn rate, and fleet size compared to recommended values for the industry. See "Fleet Calculator (Performance Dashboard)" in the glossary of the Online Help for more information.

Fleet Inventory & Status Breakdown

Navigation from your Home screen: Search Open or Fleet > > **Fleet Inventory** section

Your Fleet Operations dashboard includes a Fleet Inventory section with a range of unit data, including a full inventory, units available, units removed from the fleet, and more. The Fleet section offers status breakdowns of units and shuttle units (if applicable) in your fleet. Click a status tile to view a list of those records. See "Fleet Operations & Performance" in the full ATMS GEN2.0 Online Help for more information.

Plate & Sticker Expirations

Navigation from your Home screen: Search Open or Fleet > > **Fleet Inventory** section

Be proactive about expired or expiring license plates and inspection stickers by easily locating units with license plates and inspection stickers that are expired or expiring within 30 days.

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Fuel Replacement

Navigation from your Home screen: Search Open or Fleet >

Average Fuel Replacement and Average Fuel Replacement Cost metrics on your Fleet Performance dashboard help you to understand your location's fuel expenses and budget for future fuel usage. Browse the Fleet Performance Dashboard glossary in the full ATMS GEN2.0 Online Help for more information about these metrics.

Reports

While the applications offers live metrics to provide you with a snapshot of your operation and performance data, you can dig deeper with pre-defined reports and customized, build-your-own reporting.

May pre-defined reports are available, such as:

- Length of Use report. Measure the effectiveness and efficiency of your fleet, broken down by location and service advisor. See "Length of Use (LOU) Report" in the full ATMS GEN2.0 Online Help for more information.
- Utilization report. Evaluate the percentage of time each unit in your fleet has been in use. See "Utilization Report" in the full ATMS GEN2.0 Online Help for more information.
- Fleet Inventory. View a range of data for all active units at your location. See "Full Inventory Report" in the full ATMS GEN2.0 Online Help for more information.

You can use the following reports to get fleet information, agreement activity, appointments, availability, and more.

	Monitor Daily	Monitor Periodically
Fleet	• ***Units Available metric*** *on the Fleet Operations dashboard.* • ***Export customized, detailed search results*** *from the Appointment or*	• ***Full Inventory*** *on the Fleet Operations dashboard or Full Inventory report.* • ***Fleet utilization %*** *on the Fleet Performance dashboard.* • ***Utilization report.*** *Evaluate the percentage of time each unit in your fleet has been in use.*

	Agreement Hub by choosing the criteria that work for you.	• ***Plate and Sticker Expiration metrics*** *on the Fleet Operations dashboard.* • ***Average Fuel Replacement and Average Fuel Replacement Cost metrics*** *on the Fleet Performance dashboard.*
Appointments & Agreements	• ***Appointments and Availability chart*** *on the Operations dashboard.* • ***Units Due In metric*** *on the Agreement Operations dashboard.* • ***Export customized, detailed search results*** *from the Appointment or Agreement Hub by choosing the criteria that work for you.*	• ***Open agreements metric*** *on the Agreement Operations dashboard.* • ***Length of Use (LOU) report****. Measure the effectiveness and efficiency of your fleet, broken down by service advisor.*

Go Mobile

With the free iOS mobile app, you can scan drivers' licenses and QR codes, upload insurance cards, collect e-signatures and remote signatures via email or text, and more. See "Mobile FAQs and Requirements" to get started.

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