



Three Easy Steps... To Action an Element Approval Request



When a request for repair exceeds Element's authorization limit, you will receive an email requesting approval.

Follow these three easy steps to action the approval request.

Step 1

Review email advising approval is needed.

After an Element advisor has reviewed the initial supplier submission, you will receive an email containing summary information about the recommended repair. The email will contain a link taking you to the Element system to review and action maintenance request.

Review the content of the email and click the **View Repair Order** link.

The screenshot shows an email interface. At the top, the 'Subject' line reads: 'Action Required - Element Repair Approval Request FA2303- 3363 - VIN: 1FAHP2H82GG154012'. Below the subject line is the Element logo, which consists of three green hexagons followed by the word 'element' in blue. The main body of the email has a grey header with the text 'Approval Required' and 'Important information enclosed.' Below this, it says 'Dear Recipient,' followed by a paragraph: 'As a client enrolled in Element's maintenance program, we're asking for a repair decision on the following vehicle.' This is followed by a section titled 'Repair Order Details:' containing a bulleted list: 'Date Submitted: Jun 10 2020 7:47AM EST', 'Repair Order ID: 10018376', 'Unit Number: 14211', 'Repair Order Estimated Cost: \$3,000.00', 'Driver Waiting: No', 'Driver Name: ATT GM LOC 364 SAFELITE AUTOGLASS', and 'Breakdown: 07302-07560-07224-00364'. At the bottom of the email body, it says 'Please review then approve or adjust the repair order, or ask a question as needed.' and includes a blue link labeled 'View Repair Order'.

Note:
The subject line will indicate that a repair order requires your approval.
Your **Client Number, Unit Number & VIN** is also displayed.
Emails can be forwarded to others for actioning.

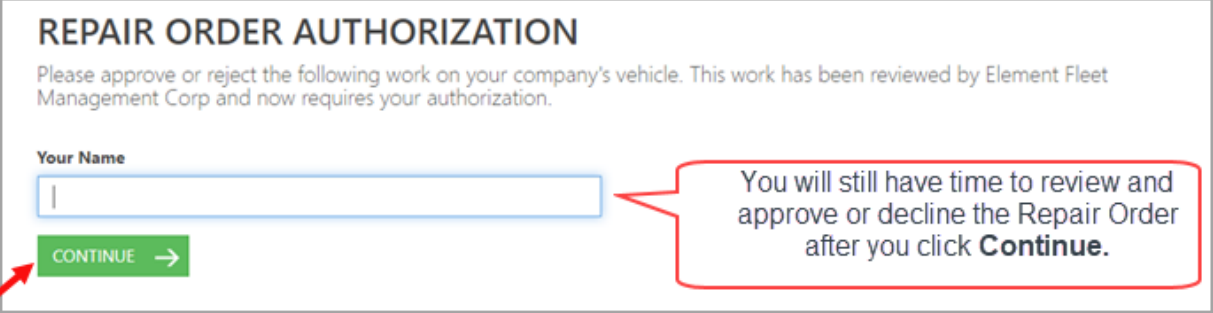
Click to action the Repair Order.

Step 2

Enter your name and click Continue.

Enter your name. This will help us to maintain our records and know who is acknowledging this authorization.

Entering your name in this step does not indicate approval, you will still have time to review the detail and either approve or decline the Repair Order after you click **Continue**.



REPAIR ORDER AUTHORIZATION

Please approve or reject the following work on your company's vehicle. This work has been reviewed by Element Fleet Management Corp and now requires your authorization.

Your Name

CONTINUE →

You will still have time to review and approve or decline the Repair Order after you click **Continue**.

Step 3

Approve or reject line items.

Now we need you to review our recommendations.

In this step you can approve/decline individual line items or approve/decline the entire Repair Order.

Approving Element Recommendations Line Items

If you select **Approve**, this tells us that you are agreeing with our recommendations.

Rejecting Element Recommendations Line Items

If you **Reject** a line item, you will be prompted for a **Rejection Reason**.

Approving/Rejecting the Entire Repair Order

To approve or reject the entire ticket, scroll to the bottom of the Repair Order, and use the **Approve Remaining** or **Reject Remaining** functionality.

When you are finished, click **Submit Repair Order**.

Once actioned the service provider will be alerted to your repair decision.

REPAIR ORDER AUTHORIZATION

Please approve or reject the following work on your company's vehicle. This work has been reviewed by Element Fleet Management Corp and now requires your authorization.

REPAIR ORDER ID: 10018312 REQUIRES CUSTOMER APPROVAL

View Cost Savings **Print** **View Audit Trail** **View Repair Order History** **View Diary Notes**

Click the Tabs to view more information

Approve or Reject individual lines

LINE ITEM	HRS	S/HR	UNIT COST	QTY	TOTAL COST
APPROVE FEE Tire Disposal Fee				4	\$8.00
RECOMMENDED BY ELEMENT FLEET MANAGEMENT CORP					
REJECT					
Service Code	Fees > Tire Charge				
Fee Name	Tire Disposal Fee				
Cause	Wear and Tear				
Authorization Status	Requires Approval				

Approve or Reject in bulk

APPROVE REMAINING **REJECT REMAINING**

ASK ELEMENT A QUESTION **PLACE ON-HOLD**

ORIGINAL ESTIMATE	\$5,971.46
COST SAVING	\$0.00
APPROVED	\$2,410.96
CLIENT REJECTED	\$3,560.50
SUBTOTAL (EXC. TAX)	\$5,971.46

Additional Functionality

Have a question about the repair order before you approve or decline?

Click **Ask Element A Question**.

Enter your message and click **Submit**.

An **Element Maintenance Client Partner** will respond to your inquiry promptly.

The screenshot shows a repair order for a 'Tire Disposal Fee' with a total of \$8.00. The fee is recommended by Element Fleet Management Corp. The interface includes buttons for 'APPROVE', 'REJECT', 'APPROVE REMAINING', 'REJECT REMAINING', 'ASK ELEMENT A QUESTION', and 'PLACE ON-HOLD'. A red arrow points to the 'ASK ELEMENT A QUESTION' button. On the right, a summary table shows: ORIGINAL ESTIMATE \$5.97, COST SAVING \$2.41, APPROVED \$2.41, CLIENT REJECTED \$3.56, and SUBTOTAL (EXC. TAX) \$5.97.

The dialog box titled 'ASK ELEMENT A QUESTION' contains the following text: 'Please note that you will be unable to make any further approval/rejection decisions on this repair order until Element Fleet Management Corp has reviewed your message and responded accordingly. By submitting this message you are not approving or rejecting this repair order.' Below this is a text input field labeled 'Message'. At the bottom are 'SUBMIT' and 'CANCEL' buttons. A red callout box on the right contains the text: 'Enter your message and click **Submit**. An **Element Maintenance Client Partner** will respond to your inquiry.'

Important Notes

If you submit an inquiry, your repair order will be in hold status until an Element Maintenance Client Partner responds.

Submitting a message does not replace approving or rejecting a repair order.

Additional Functionality

How to place a repair order on hold.

Placing a repair order on hold advises Element that you are aware that a decision needs to be made and are reviewing, but not yet ready to submit your decision. Element will not contact you until after the date and time you enter.

Click **Place On-Hold**

Enter the **Date, Time, and Time Zone** you would like follow-up on this repair to resume.

The screenshot shows a repair order interface. At the top, there are buttons for 'APPROVE' and 'REJECT'. Below that, the part details are listed: 'PART Heating and Air Conditioning', 'RECOMMENDED BY ELEMENT FLEET MANAGEMENT CORP', 'Service Code Heating and Air Conditioning', 'Part Name AIR CONDITIONING', 'Part Code AC', 'Manufacturer', 'Cause Preventative Maintenance', and 'Authorization Status Requires Approval'. The price is \$1,500.00. Below the part details, there are buttons for 'APPROVE REMAINING', 'REJECT REMAINING', and 'ASK QUESTION OR PLACE ON HOLD'. A red arrow points to the 'ASK QUESTION OR PLACE ON HOLD' button. To the right of these buttons is a summary table:

ORIGINAL ESTIMATE	\$1,500.00
COST SAVING	\$0.00
APPROVED	\$1,500.00
CLIENT REJECTED	\$0.00
SUBTOTAL (EXC. TAX)	\$1,500.00

At the bottom of the interface is a green button labeled 'SUBMIT REPAIR ORDER' with a checkmark icon.

Enter a message indicating the **reason for the hold** so that Element may respond to inquiries from the shop or driver.

Press **Submit**.

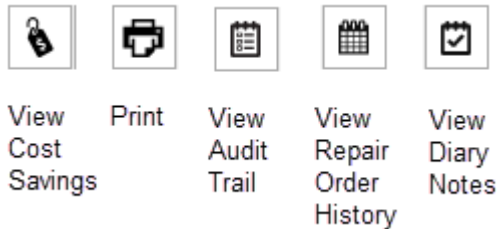
The screenshot shows a dialog box titled 'PLACE ON HOLD'. The text inside reads: 'Placing this repair order on hold advises Element Fleet Management Corp that you are aware of the need to make a decision and they will not contact you until after the time set below.' Below this, there are input fields for 'On Hold Until': '9/23/2020', '06:45 PM', and a dropdown menu for 'Please select timezone'. A red box highlights the date and time fields, with a callout bubble saying 'You will not be contacted by Element until after the date and time you enter.' Below the input fields is a text area for 'Message' with the placeholder text 'Please provide hold reason here.' At the bottom of the dialog box are two buttons: 'SUBMIT' (highlighted with a red arrow) and 'CANCEL'.

Appendix

Tool Bar & Tabs

Tool Bar

The tool bar can be utilized at the **Work Order Level** or at the **Specific Line Level**.



Tabs

Click the tabs to view information about the **Asset**, the **Work Order**, the **Shop** or if there is a **Replacement Unit On Order**.

REPLACEMENT (indicated by a red arrow)

Element Unit ID 14425	VIN Number 1FTNE1EWSEDA24286	Model Year 2014	Make Ford	Model E150 VANS - ECONOLINE CARGO VAN
Color	License Plate Oregon 396GSW	Card Type Managed Maintenance	Transmission 4-SPEED	Fuel Type Flex
Odometer Reading 1150000	Last Odometer 01/23/2020 08:05 AM 108552	Engine Hours Not Entered	Client Dollar Limit \$1,500.00	Term End Mileage
Driver Name ATT GM LOC 4260 SAFELITE AUTOGLASS	Vehicle Status Active	Engine Description 4.6L EFI V8 FF	GVWR 8,520 lbs	Product Class Light Trucks

RO DETAILS

Driver Phone Number	Alternate Driver Name	Driver Is Waiting No	Created Date Time 07/15/2020 01:39 PM	Submitted Date Time 07/15/2020 01:57 PM
Estimated Completion 07/20/2020 05:00 PM	Actual Completion	Created By Terry Hergenbahn		

SHOP DETAILS

Shop Name FORD LINC MERC OF SLIDELL	Shop Tel 985-643-8900	Invoice Number	Shop Contact Terry	Payment Direction INDEPENDENT
Shop Address 400 HOWZE BEACH RD, Slidell, LA, 70461	Payment Type Check	Shop Fax #	Shop Email	