



LeasePlan

EVOII

A quick guide on how to create and request approval for vehicle maintenance and repairs in LeasePlan's online self-service tool.

Vehicle maintenance management at your fingertips.

LeasePlan's online self-service tool for vehicle maintenance, EVOII, gives all you need to better manage your job workflow from end to end. With just a few quick clicks you can:

- Create jobs
- Request approval
- Keep track of each job status
- Update jobs, and
- Submit your invoice for payment

Follow this simple guide to help you get the best out of EVOII.

Need set-up and access to EVOII?
Contact us on 0800 822 212.

Let's get started...

Contents

Log on Start here to access EVOII

Create Approval

Use this step by step guide to create a job and add the items and pricing needed to get the job done. This will cover;

- Vehicle search
- Vehicle confirmation
- Job details
- Job cost details
- Submit for approval

Manage Approval How to review an open job

Close and invoice a job How to close a job

Edit job details

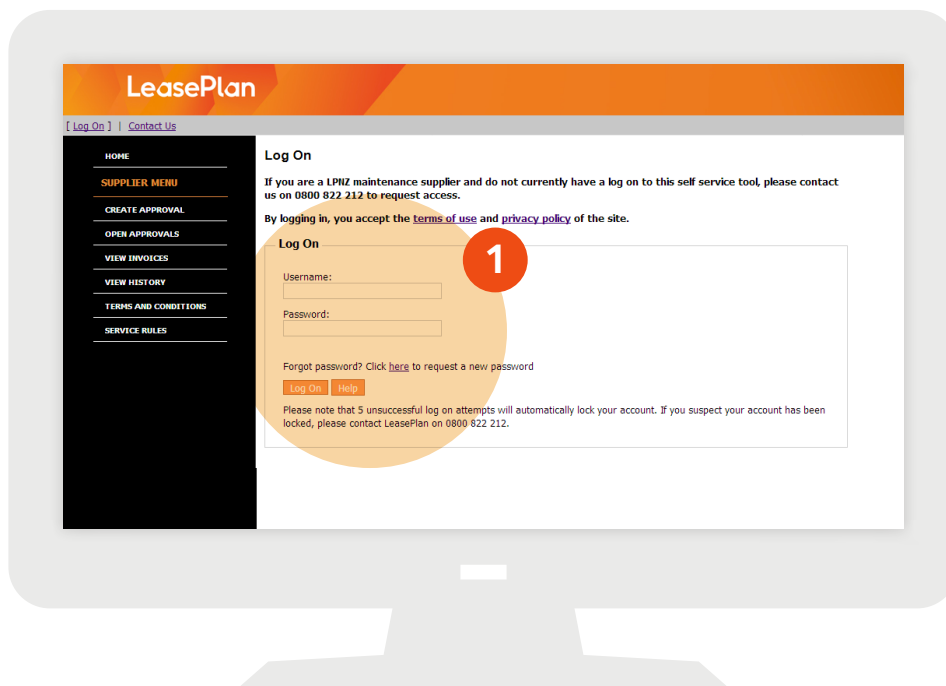
How to adjust pricing or add items to a job

Log on

To log on to EVOII go to <https://maintenance.leaseplan.co.nz>

1. On the login screen enter your user ID and password we've already provided you. Click **'login'**.

You can also access the website by going to www.leaseplan.co.nz and hovering over **'login to'** and clicking on the navigation tab **EVOII**.



Every time you log in you will be asked to accept the site terms of use and privacy policy. Please read and accept.



IF YOU DON'T HAVE ACCESS TO EVOII CALL US ON 0800 822 212 TO SET-UP ACCESS.

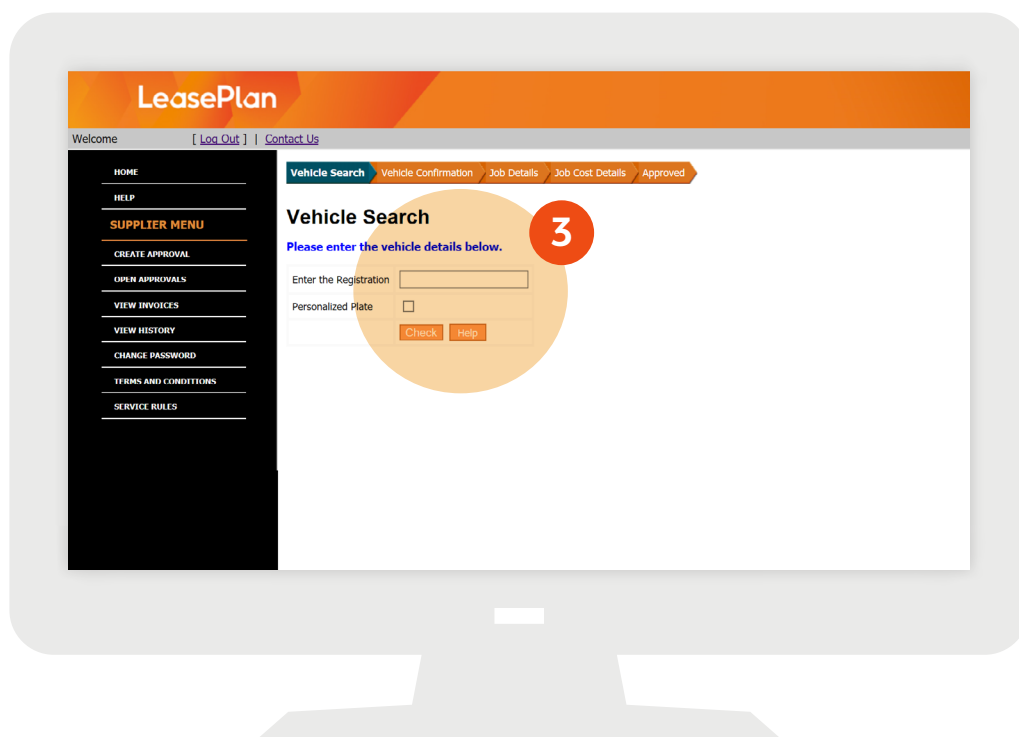
FORGOT YOUR PASSWORD? Click on the link to request a new one and we'll be in touch.

Create Approval

Vehicle Search

Click on 'Create Approval' on the left-hand side menu.

3. This will take you to Vehicle Search input screen. **Enter the registration number of the vehicle and then click on 'Check'.** This will then search the database for the specific vehicle details.



IF THE VEHICLE DOESN'T COME UP ON THE SEARCH AND YOU THINK IT'S A LEASEPLAN VEHICLE CALL US ON 0800 822 212.

Vehicle Confirmation

Check all the vehicle details are correct and then enter the odometer reading.

4. The main vehicle details will be shown if the vehicle is managed by LeasePlan. Check that the correct vehicle is shown, enter the odometer reading, check the tick box to confirm the details are correct and click 'Continue'.

LeasePlan

Welcome [Log Out] | Contact Us

Vehicle Search Vehicle Confirmation Job Details Job Cost Details Approved

Vehicle Confirmation

Please check all details below to confirm that this is the correct registration.

Registration number	LPNZ
Vehicle colour	BLUE
Client name	LeasePlan New Zealand Limited
Vehicle make	SUBARU
Vehicle model	Outback 2.5i Auto
WOF expiry date	13/05/2018
Odometer	<input type="text"/>

☐ Please confirm all of the details above are correct

Continue Help



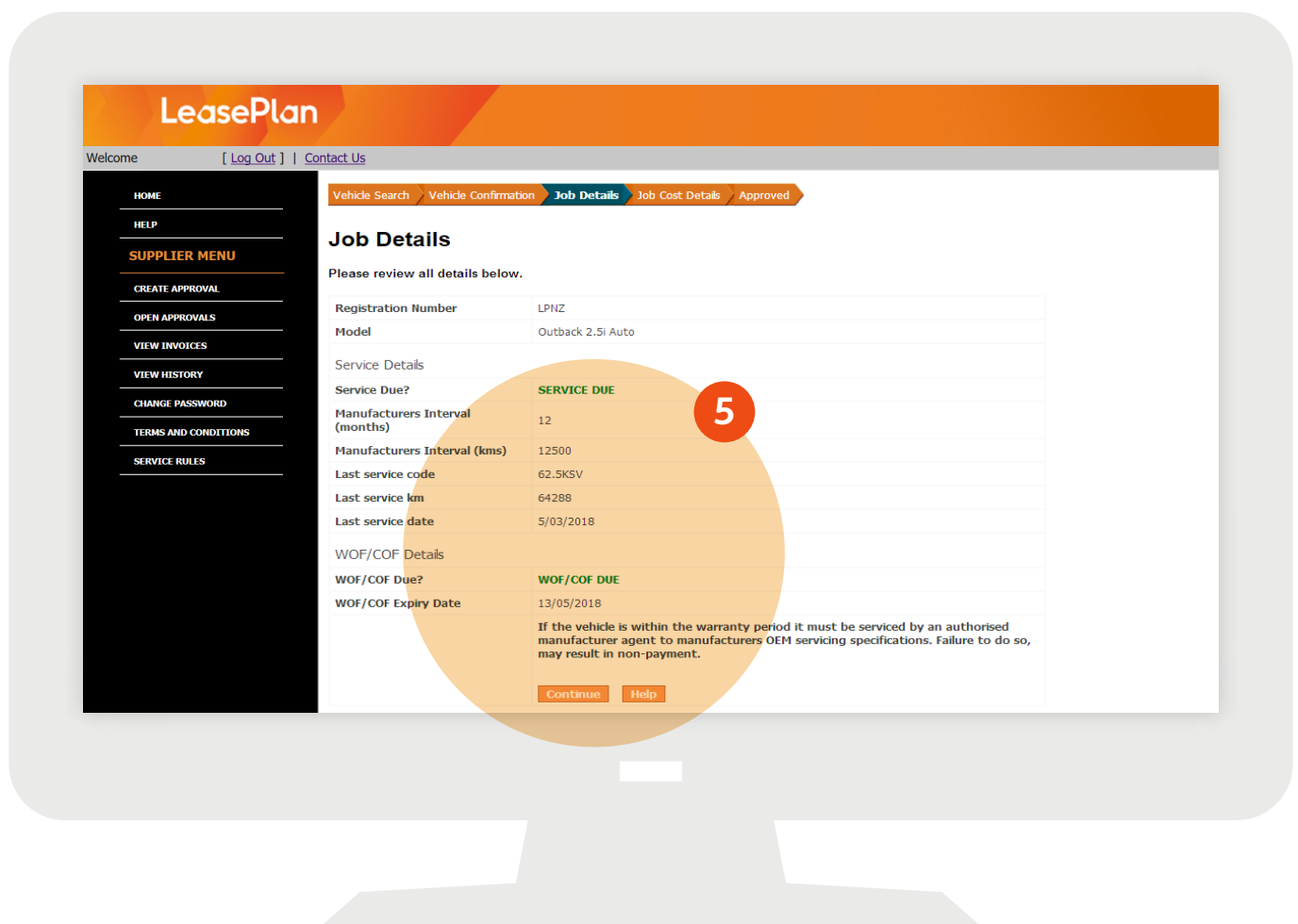
IF THE VEHICLE ALSO HAS A HUBOMETER THIS NEEDS TO BE ENTERED ON THIS SCREEN AS WELL.

Job Details

You will see if a service or WOF/COF is due.

5. EVOII will show if a WOF/COF or service is due, check all the details are correct before clicking 'Continue'.

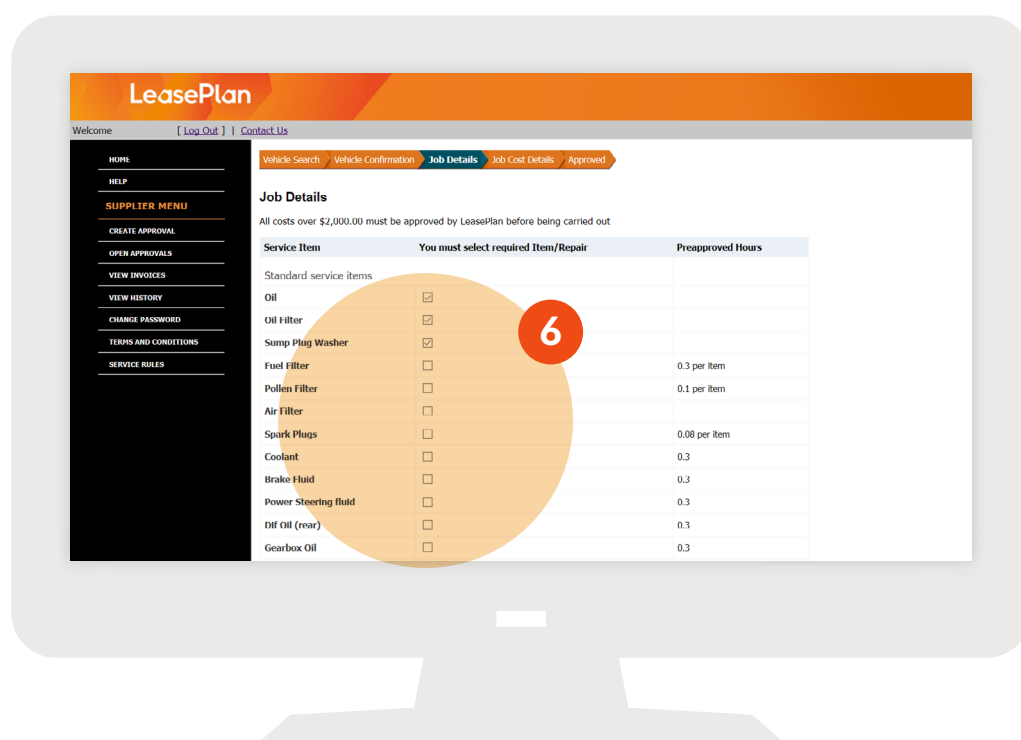
If neither the WOF/COF or service is due, still click 'Continue' to create a new job for other repairs or replacements.



Job Details

If a service is due, select the service items needed from the check boxes.

6. Select the service items needed from the service schedule shown by checking the boxes from the list in accordance with the manufacturers schedule. If there are any service items that are not presented here then scroll further down the page to 'Additional Service Items'. If the WOF is due, add it to the job by selecting "Request Approval for WOF" in the What's Next? section.



**TO REVIEW THE SERVICE HISTORY OF THE VEHICLE
– CLICK ON 'VIEW HISTORY' ON THE LEFT-HAND
SUPPLIER MENU.**

Job Details

If WOF/COF or service is not due, you can select items for other repairs or replacements further down the page.

7. For other repairs or maintenance, there is a comprehensive list of items in the 'All Other Items' list. **Search this list to find the parts you require for the job. Items selected from this list will usually require LeasePlan approval.**

Standard 1.2

If you cannot find what you need in the list below, please call LeasePlan on 0800 822212.

Additional Service Items

Category	Status	Hours	Accept
<input type="text"/>			Add

All Other Items 7

Category	Hours	Accept
<input type="text"/>		Add

If you wish to view service rules, [click here](#).

What's Next?

- ☐ Request Approval for Service
- ☐ Request Approval for WOF/COF
- ☐ By accepting this vehicle for maintenance or repairs I understand and accept the [Terms and Conditions](#).

[Continue](#) [Help](#)

Job Details

Accept all the items for the jobs you will carry out.

8. Lastly, you will be prompted to request approval for the job you would like to carry out. You will need to request approval for Service and/or WOF/COF. You will always be asked to accept the terms and conditions before you click Continue.

Standard 1.2

If you cannot find what you need in the list below, please call LeasePlan on 0800 822212.

Additional Service Items

Category	Status	Hours	Accept
<input type="text"/>			Add

All Other Items

Category	Hours	Accept
<input type="text"/>		Add

If you wish to view service rules, [click here](#).

What's Next?

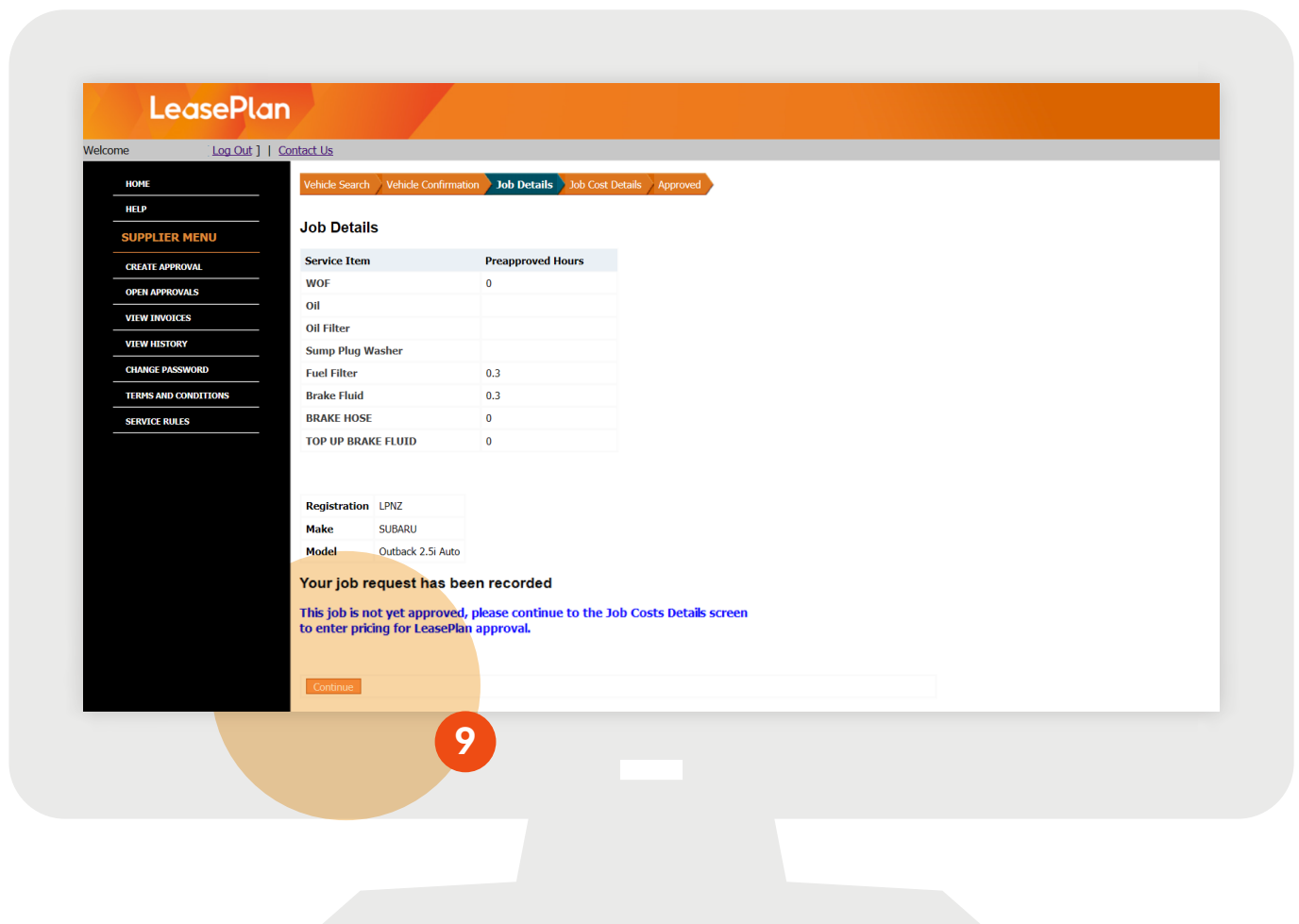
- ☐ Request Approval for Service
- ☐ Request Approval for WOF/COF
- ☐ By accepting this vehicle for maintenance or repairs I understand and accept the [Terms and Conditions](#).

[Continue](#) [Help](#)

Job Details

EVOII has now recorded your job.

9. Click '**Continue**' to carry onto the job cost details screen to enter your pricing.



Job Cost Details

Before work can start on any job, your pricing for the work must be entered in EVOil for approval.

10. For the items selected for this job, **enter the pricing, quantity and labour hours.** If you need to add parts on this screen the **Additional Service Items** and the **All Other Items** lists are still available at the bottom of the screen.

Don't forget to enter in the name of the technician working on the job.

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Vehicle Search > Vehicle Confirmation > Job Details > **Job Cost Details** > Approved

Job Cost Details

Please enter all parts and labour costs and submit for LeasePlan approval.

For vehicle servicing you must adhere to the manufacturers service schedules. Contact LeasePlan if you have any queries on 0800 822212.

[Exit](#)

* = Required Field

Rego LPNZ

Labour rate \$114.75

Technician working on the job* Your branch name or number

Warranty or service plan notes* Enter N/A if not applicable

Service Type

Exclude	Item	Hours allowed
<input type="checkbox"/>	Standard	1.2

Service Details [Vehicle History](#)

Delete	Item	Parts/Item Unit Cost	Quantity	Hours allowed	Total (excluding gst)	Accepted
<input type="checkbox"/>	Oil	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Comments: <input type="text"/>						
<input type="checkbox"/>	Oil Filter	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Job Cost Details

When is my job approved?

Lastly, you will need to submit the job to LeasePlan for Approval by clicking 'Submit for Approval'.

11. The job may be automatically approved and the system will issue an order number. You can now start the work.

Otherwise the job will immediately appear in the LeasePlan pending approval queue to be reviewed by us as soon as possible.

You will know LeasePlan has received your job when this message appears:
Submitted to LeasePlan for approval, job will move to Approved queue when authorised.

If you cannot find what you need in the list below, please call LeasePlan on 0800 822212.

Category	Status	Hours	Accept
			Add

Additional Service Items

Category	Hours	Accept
		Add

All Other Items

[Request Job Approval.](#)

Total Hours	2.80
Labour Cost	\$221.20
Parts/Item Subtotal	\$234.60
Net Total	\$455.80
GST	\$68.37
Total	\$524.17

[Submit for Approval](#)

[Save for future update](#)



IF YOU DON'T HAVE ALL THE DETAILS AT HAND, YOU CAN 'SAVE FOR FUTURE UPDATE' SO YOU CAN ENTER PRICING IN LATER AND THEN SUBMIT FOR APPROVAL.

Manage Approval

Acceptance

To review open jobs - click on 'Open Approvals' on the menu.

12. Here you can view all open jobs, approved jobs and closed jobs using the tabs along the top menu. Open jobs are jobs waiting on LeasePlan or client approval, the **Approval Status** column allows you to see the progress of the approval process.

The screenshot shows the LeasePlan 'Approvals' page. The left sidebar contains a menu with options like HOME, HELP, SUPPLIER MENU, CREATE APPROVAL, OPEN APPROVALS, VIEW INVOICES, VIEW HISTORY, CHANGE PASSWORD, TERMS AND CONDITIONS, and SERVICE RULES. The main content area is titled 'Approvals' and includes a sub-header 'View your open, approved and completed approvals here.' Below this is a table with tabs for OPEN, APPROVED, and CLOSED. The table has columns for Date Time Acceptance, Supplier Name, Branch, Rego, Approval Status, Days before approval expires, User Status, and Action. A callout box labeled '12' points to the 'Approval Status' column, showing examples: 'Pending LeasePlan approval', 'Pending LeasePlan approval', 'Pending client approval', and 'Pending LeasePlan approval'.

OPEN	APPROVED	CLOSED
8/06/2018	LEASEPLAN SUPPLIER	Auckland LPNZ
7/06/2018	LEASEPLAN SUPPLIER	Auckland LPNZ
24/05/2018	LEASEPLAN SUPPLIER	Wellington LPNZ
23/04/2018	LEASEPLAN SUPPLIER	Auckland LPNZ
18/04/2018	LEASEPLAN SUPPLIER	Wellington LPNZ
17/04/2018	LEASEPLAN SUPPLIER	Auckland LPNZ
16/04/2018	LEASEPLAN SUPPLIER	Wellington LPNZ
16/04/2018	LEASEPLAN SUPPLIER	Auckland LPNZ
16/04/2018	LEASEPLAN SUPPLIER	Wellington LPNZ
16/04/2018	LEASEPLAN SUPPLIER	Wellington LPNZ



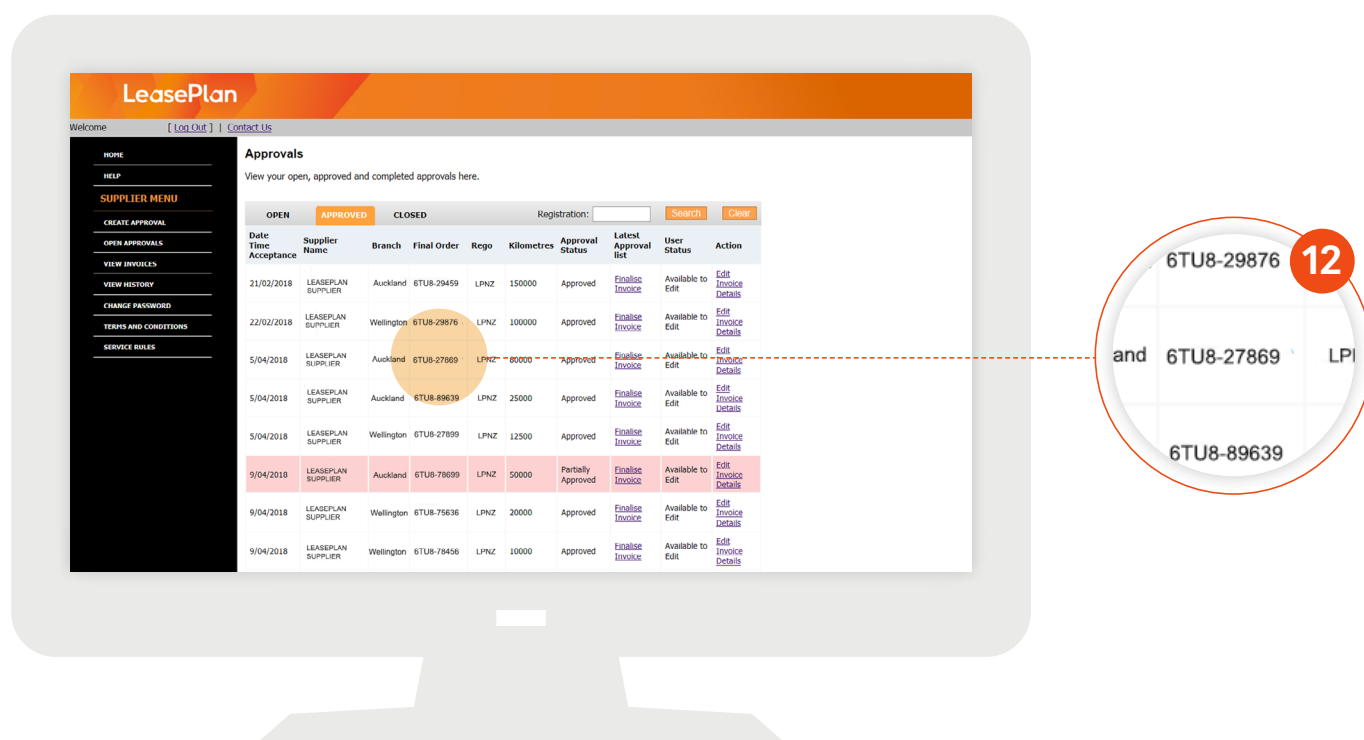
PLEASE DO NOT START WORK ON ANY JOB UNTIL LEASEPLAN HAS PROVIDED AN ORDER NUMBER.

Work can start as soon as the job is approved.

Acceptance

To review open jobs - click on 'Open Approvals' on the menu.

12. Once a job is **approved it will move to the approved tab** and an order number will be issued and you can start work.



LeasePlan

Welcome [Log Out] | Contact Us

Approvals

View your open, approved and completed approvals here.

Registration: Search Clear

OPEN	APPROVED	CLOSED							
Date Time	Supplier Name	Branch	Final Order	Rego	Kilometres	Approval Status	Latest Approval List	User Status	Action
21/02/2018	LEASEPLAN SUPPLIER	Auckland	6TU8-29459	LPNZ	150000	Approved	Finalise Invoice	Available to Edit	Edit Invoice Details
22/02/2018	LEASEPLAN SUPPLIER	Wellington	6TU8-29876	LPNZ	100000	Approved	Finalise Invoice	Available to Edit	Edit Invoice Details
5/04/2018	LEASEPLAN SUPPLIER	Auckland	6TU8-27869	LPNZ	80000	Approved	Finalise Invoice	Available to Edit	Edit Invoice Details
5/04/2018	LEASEPLAN SUPPLIER	Auckland	6TU8-89639	LPNZ	25000	Approved	Finalise Invoice	Available to Edit	Edit Invoice Details
5/04/2018	LEASEPLAN SUPPLIER	Wellington	6TU8-27899	LPNZ	12500	Approved	Finalise Invoice	Available to Edit	Edit Invoice Details
9/04/2018	LEASEPLAN SUPPLIER	Auckland	6TU8-78699	LPNZ	50000	Partially Approved	Finalise Invoice	Available to Edit	Edit Invoice Details
9/04/2018	LEASEPLAN SUPPLIER	Wellington	6TU8-75636	LPNZ	20000	Approved	Finalise Invoice	Available to Edit	Edit Invoice Details
9/04/2018	LEASEPLAN SUPPLIER	Wellington	6TU8-78456	LPNZ	10000	Approved	Finalise Invoice	Available to Edit	Edit Invoice Details

6TU8-29876 and 6TU8-27869 LPI

6TU8-89639



YOU CAN DOUBLE CLICK THE COLUMN HEADINGS TO SORT BY THAT COLUMN, OR SEARCH FOR A VEHICLE BY USING THE REGISTRATION NUMBER SEARCH FIELD.

Acceptance

Jobs can also be Partially Approved or Declined.

13. Sometimes a job is only partially approved. Partially approved jobs are approved jobs with one or more **item declined**. These jobs are highlighted in red in the approved queue, to alert you to the 'partial approval'.

Jobs can also be declined entirely. The approval status will show you if a job is Approved, Partially Approved or Declined. Declined jobs will be moved directly to the closed tab.

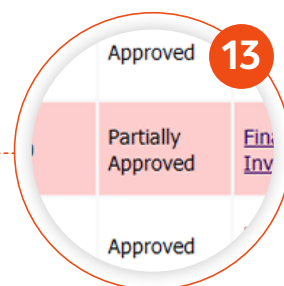
LeasePlan

Welcome [Log Out] | Contact Us

Approvals
View your open, approved and completed approvals here.

Registration: Search

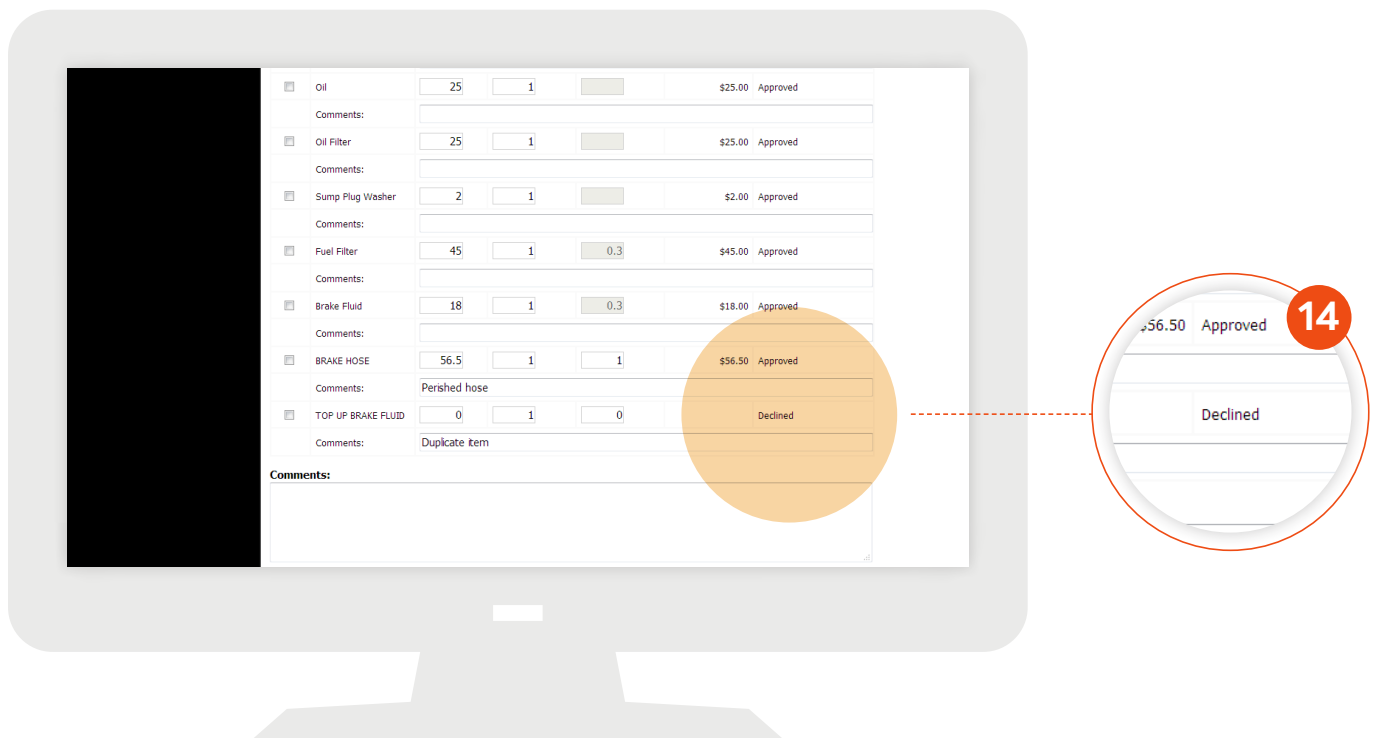
OPEN		APPROVED		CLOSED			
Date: Time Acceptance	Supplier Name	Branch	Final Order	Rego	Kilometres	Approval Status	Action
21/02/2018	LEASEPLAN SUPPLIER	Auckland	6TUB-29459	LPNZ	150000	Approved	Finalise Invoice Available to Edit Edit Invoice Details
22/02/2018	LEASEPLAN SUPPLIER	Wellington	6TUB-29976	LPNZ	100000	Approved	Finalise Invoice Available to Edit Edit Invoice Details
5/04/2018	LEASEPLAN SUPPLIER	Auckland	6TUB-27869	LPNZ	80000	Approved	Finalise Invoice Available to Edit Edit Invoice Details
5/04/2018	LEASEPLAN SUPPLIER	Auckland	6TUB-89639	LPNZ	25000	Approved	Finalise Invoice Available to Edit Edit Invoice Details
5/04/2018	LEASEPLAN SUPPLIER	Wellington	6TUB-27899	LPNZ	12500	Approved	Finalise Invoice Available to Edit Edit Invoice Details
9/04/2018	LEASEPLAN SUPPLIER	Auckland	6TUB-78699	LPNZ	50000	Partially Approved	Finalise Invoice Available to Edit Edit Invoice Details
9/04/2018	LEASEPLAN SUPPLIER	Wellington	6TUB-75636	LPNZ	20000	Approved	Finalise Invoice Available to Edit Edit Invoice Details
9/04/2018	LEASEPLAN SUPPLIER	Wellington	6TUB-78456	LPNZ	10000	Approved	Finalise Invoice Available to Edit Edit Invoice Details



Acceptance

To review a Partially Approved job – click on 'Edit Invoice Details' for that job.

14. To review a Partially Approved job – click on "Edit Invoice Details' for that job. The Accepted column will show which items have been declined.



IF YOU WOULD LIKE TO QUERY DECLINED JOBS OR DECLINED ITEMS – PLEASE CALL LEASEPLAN TO DISCUSS ON 0800 822 212.

Close & invoice a job

Acceptance

Closing a job

Once a job is completed it will need to be closed.

15. To close off a job - Click on 'Finalise Invoice' on the open job.

LeasePlan

Welcome [Log Out] | Contact Us

Approvals

View your open, approved and completed approvals here.

OPEN		APPROVED		CLOSED		Registration:	Search	Clear	
Date Time Acceptance	Supplier Name	Branch	Final Order	Rego	Kilometres	Approval Status	Latest Approval list	User Status	Action
21/02/2018	LEASEPLAN SUPPLIER	Auckland	6TUB-29459	LPNZ	150000	Approved	Finalise Invoice	Available to Edit	Finalise Invoice Ava Edit
22/02/2018	LEASEPLAN SUPPLIER	Wellington	6TUB-29676	LPNZ	100000	Approved	Finalise Invoice	Available to Edit	Finalise Invoice A
5/04/2018	LEASEPLAN SUPPLIER	Auckland	6TUB-27869	LPNZ	80000	Approved	Finalise Invoice	Available to Edit	Finalise Invoice A
5/04/2018	LEASEPLAN SUPPLIER	Auckland	6TUB-89639	LPNZ	25000	Approved	Finalise Invoice	Available to Edit	Finalise Invoice A
5/04/2018	LEASEPLAN SUPPLIER	Wellington	6TUB-27899	LPNZ	12500	Approved	Finalise Invoice	Available to Edit	Finalise Invoice A
9/04/2018	LEASEPLAN SUPPLIER	Auckland	6TUB-78699	LPNZ	50000	Partially Approved	Finalise Invoice	Available to Edit	Finalise Invoice A
9/04/2018	LEASEPLAN SUPPLIER	Wellington	6TUB-75636	LPNZ	20000	Approved	Finalise Invoice	Available to Edit	Finalise Invoice A
9/04/2018	LEASEPLAN SUPPLIER	Wellington	6TUB-78456	LPNZ	10000	Approved	Finalise Invoice	Available to Edit	Finalise Invoice A



**ALL JOBS MUST BE CLOSED WITHIN 30 DAYS.
NO PAYMENTS CAN BE MADE UNTIL THE JOB
HAS BEEN CLOSED.**

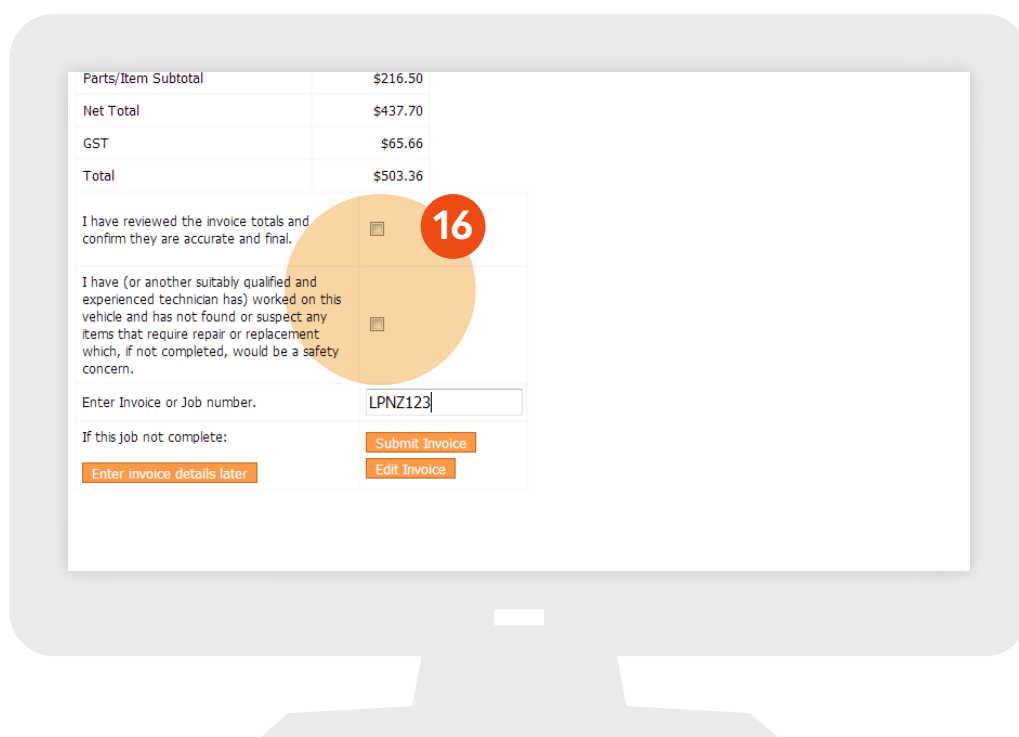
Acceptance

Closing a job

Review the invoice and enter your invoice number.

16. Review the invoice details recorded by EVOII, and confirm these are accurate by checking the first tick box.

Check the second tick box to confirm the vehicle is safe to leave the workshop. If you have any safety concerns please contact LeasePlan immediately on 0800 822 212.



Parts/Item Subtotal	\$216.50
Net Total	\$437.70
GST	\$65.66
Total	\$503.36

I have reviewed the invoice totals and confirm they are accurate and final. ☐

I have (or another suitably qualified and experienced technician has) worked on this vehicle and has not found or suspect any items that require repair or replacement which, if not completed, would be a safety concern. ☐

Enter Invoice or Job number.

If this job not complete:

If you are set-up for BCTI this payment will be made in accordance with your BCTI agreement.



TO REVIEW PAID INVOICES, A LIST CAN BE FOUND BY CLICKING 'VIEW INVOICES' FROM THE LEFT-HAND MENU.

Edit a job

Review

Edit

To edit an open job - click on 'Open Approvals' on the menu.

17. Find the job you want to edit from the list below. Click on 'Edit Invoice Details' in the Action column. This will take you to the job cost details.

LeasePlan

Welcome [Log Out] | Contact Us

Approvals

View your open, approved and completed approvals here.

Registration: Search Clear

OPEN	APPROVED	CLOSED							
Date Time Acceptance	Supplier Name	Branch	Final Order	Rego	Kilometres	Approval Status	Latest Approval List	User Status	Action
21/02/2018	LEASEPLAN SUPPLIER	Auckland	6TU8-29459	LPNZ	150000	Approved	Finalise Invoice	Available to Edit	Edit Invoice Details
22/02/2018	LEASEPLAN SUPPLIER	Wellington	6TU8-29876	LPNZ	100000	Approved	Finalise Invoice	Available to Edit	Edit Invoice Details
5/04/2018	LEASEPLAN SUPPLIER	Auckland	6TU8-27869	LPNZ	80000	Approved	Finalise Invoice	Available to Edit	Edit Invoice Details
5/04/2018	LEASEPLAN SUPPLIER	Auckland	6TU8-89639	LPNZ	25000	Approved	Finalise Invoice	Available to Edit	Edit Invoice Details
5/04/2018	LEASEPLAN SUPPLIER	Wellington	6TU8-27899	LPNZ	12500	Approved	Finalise Invoice	Available to Edit	Edit Invoice Details
9/04/2018	LEASEPLAN SUPPLIER	Auckland	6TU8-78699	LPNZ	50000	Partially Approved	Finalise Invoice	Available to Edit	Edit Invoice Details
9/04/2018	LEASEPLAN SUPPLIER	Wellington	6TU8-75636	LPNZ	20000	Approved	Finalise Invoice	Available to Edit	Edit Invoice Details
9/04/2018	LEASEPLAN SUPPLIER	Wellington	6TU8-78456	LPNZ	10000	Approved	Finalise Invoice	Available to Edit	Edit Invoice Details

Action 17

Available to Edit

[Edit Invoice Details](#)

Available to Edit

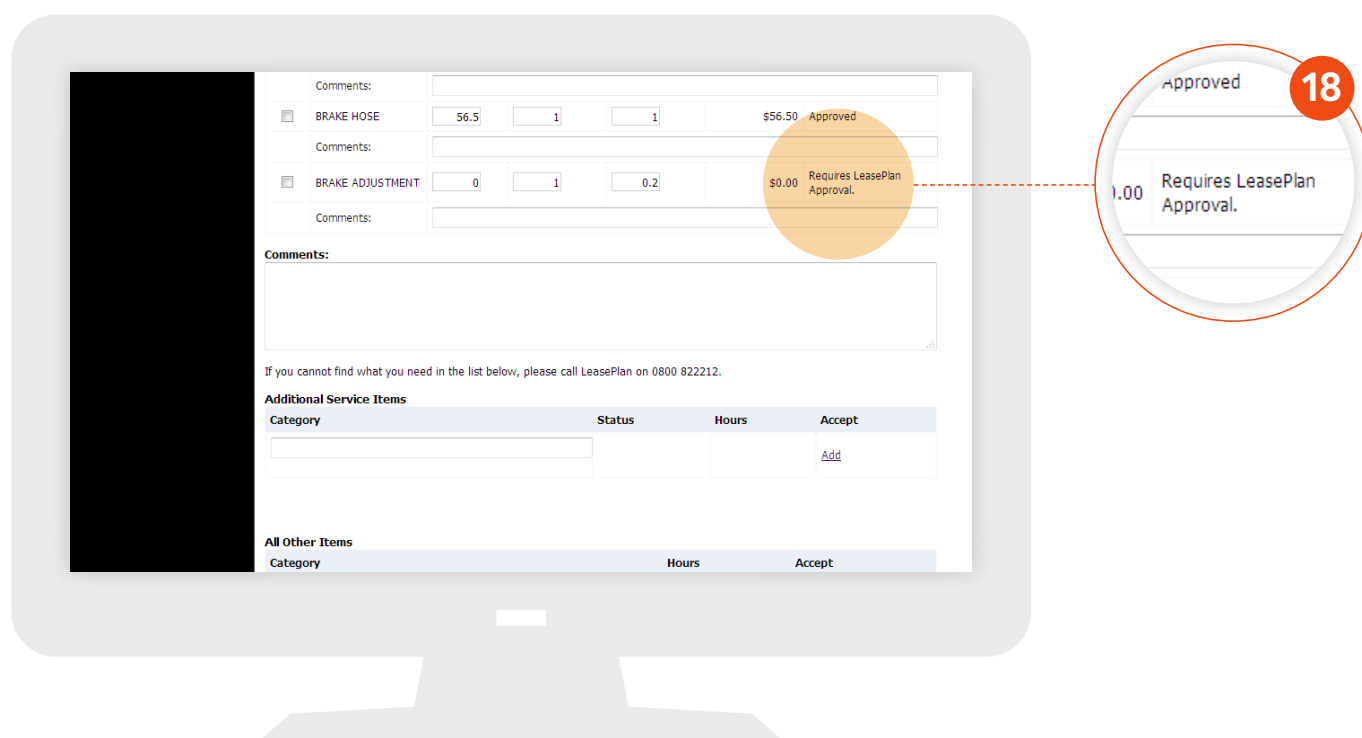
[Edit Invoice Details](#)

Edit

Invoice details

Add items or adjust pricing as needed.

18. In the job cost details screen you can adjust pricing or add in more items using the 'Additional Service Items' or 'All Other Items' lists. The job will need to be submitted for approval again.



PLEASE REFER TO LEASEPLAN APPROVAL STEPS ON PAGES 4 THROUGH TO 12 OF THIS USER GUIDE.



LeasePlan

CONTACT US

leaseplan.co.nz
0800 822 212