OLASIO
SOURCE

User Guide

Customer data collection made simple.

www.olasio.com/source Contact us: *support@olasio.com*

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1. Getting started

To begin using Olasio Source, you will need an user account. Each user account is connected to a business account. It is necessary that each individual user of Olasio Source have an account, as all system generated communications use contact information associated with the user account.

If your business does not already have an account, an authorised representative of your business needs to sign up for a business account first. (1.1 Creating a business account)

If your business already has an account, you can start using Olasio Source by having your business account administrator invite you to join. (1.2 Joining by invitation)

If you already have an user account, you can sign in at https://source.olasio.com/login.

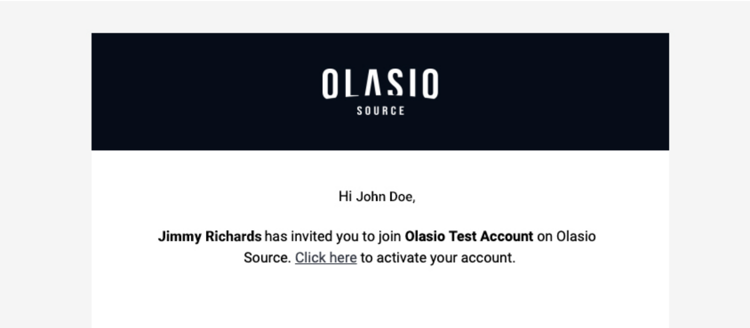
1.1 CREATING A BUSINESS ACCOUNT

As an authorised representative of your business, you can sign your business (and yourself) up at https://source.olasio.com/signup

Once you have signed up, you will receive an activation email with links to get started.

1.2 JOINING BY INVITATION

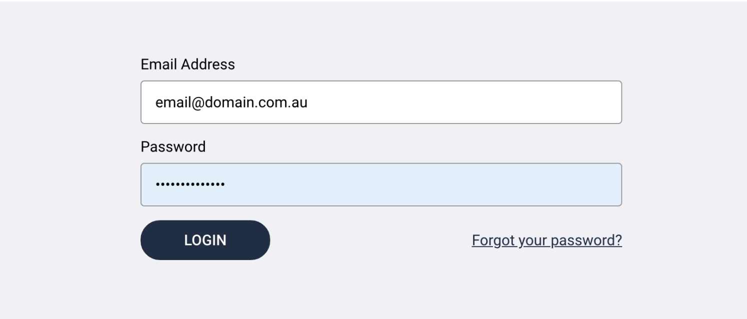
Your business account administrator will invite you to join.You'll receive an email which will include a link to create your user account.



2. Account

2.1 LOGGING IN

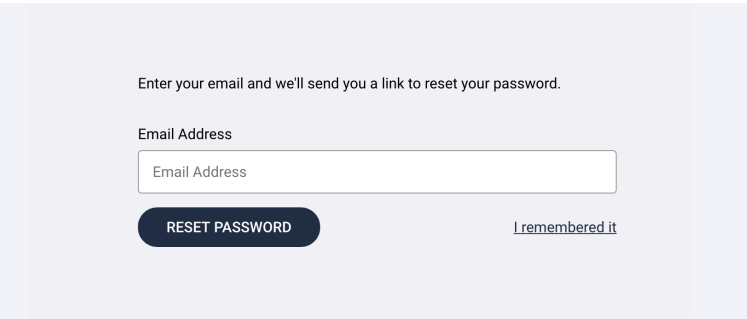
To log into Olasio Source go to https://source.olasio.com/login and enter your username and password.



2.2 FORGOTTEN PASSWORD

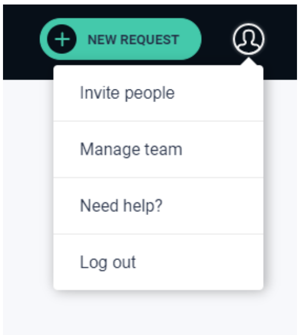
If you have forgotten your password, you can reset your password by clicking on ‘forgot your password?’ link at the bottom of the sign-in screen at https://source.olasio.com/login

After you enter your email address you will be emailed instructions on how to reset your password.



3. Team management

Administrators can invite, remove or alter other team member accounts.The team can be managed by selecting the ‘Manage Team’ option under your account.

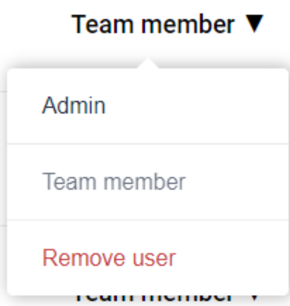


3.1 INVITING NEW TEAM MEMBERS

Admin level team members may select “invite people” from the menu opened by selecting the human silhouette. Type in the new user name and email address, and select confirm to send an email invite to a new member you wish to add to your account.

3.2 REMOVING TEAM MEMBERS

- Team members may be removed from the account by selecting “managed team” from the menu.
- Selecting the down arrow next to the team members name you would like to remove and confirm by selecting “remove user”.



3.3 CHANGING A TEAM MEMBER'S ROLE

- An admin level team member may change an existing team member's administration level by selecting the "manage team" option.
- Select the down arrow next to the user they would like to edit and selecting the administration level they would like to allocate that that team member.

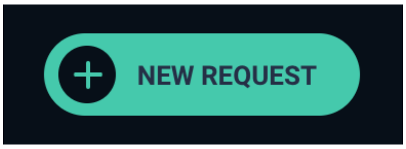
4. Creating a new Source Request

Source Requests are sent out to your customer (recipient) to complete.

Each Source Request contains which tasks you want to complete and additional information for each of those tasks.

Once you have completed creating the request, an email and a SMS message will be sent out to the recipient.

To create a new Source Request, click the ‘NEW REQUEST’ button.



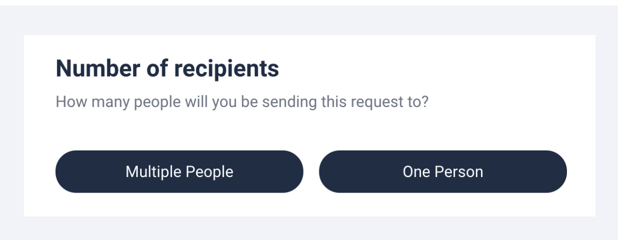
4.1 SELECT TASK

Choose what tasks you want your recipient to perform. You can find out more information on the task by hovering over the “?”

4.2 NUMBER OF RECIPIENTS

Source Requests are sent to one person (who performs all the tasks included in the request).

For convenience, if you need to create many Source Requests at once, you can choose the ‘Multiple People’ option.



4.2.1 Single recipient

This will send the request to one person (recipient).

- Provide recipient details, external reference (if applicable), and asset/identity details.
- Write a message to the recipient to ensure they understand what is required from them (optional).

4.2.2 Multiple recipients

This will duplicate the request (and all tasks selected) and send to multiple people.

- Download CSV template.
- Provide recipient details according to the format in the template, either manually or copy & paste from existing document if applicable.
- Upload completed CSV document from your device.
- Write a message to the recipient to ensure they understand what is required from them (optional). Please note, this one message will get sent to all recipients.

	A	B	C	D	E
1	Name	Phone	Email	External Reference	Car Details (Year Make Model &
2	John Citizen	0411 111 111	john.c@email.com	S11111	Honda Civic
3	Jane Citizen	0422 222 222	jane.c@email.com	S11112	Honda Civic
4					
5					
6					
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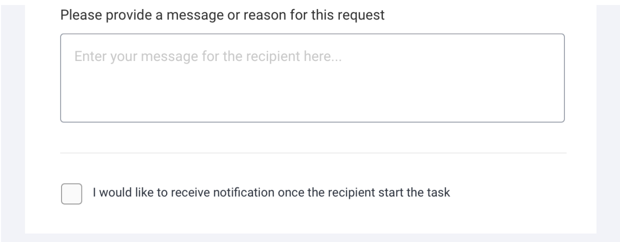
9					
10					

4.3 RECEIVE NOTIFICATION

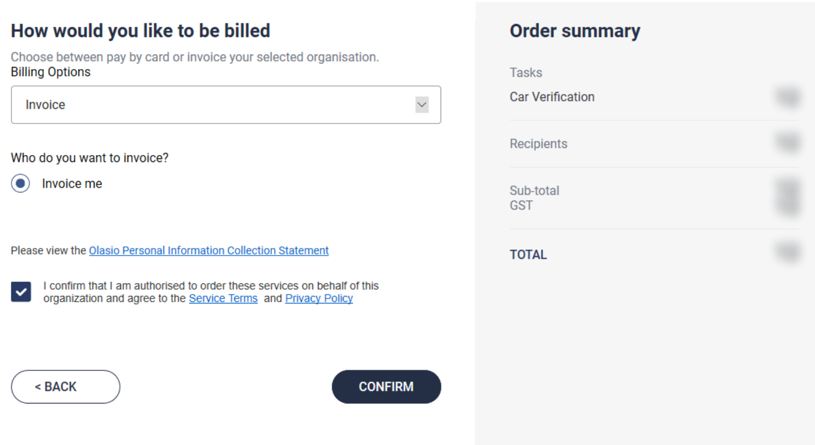
Check this box if you would like an email notification once the recipient completes their task.



4.4 CONFIRM YOUR REQUEST

Review your request and select your prefered billing option:

- Pay by credit card.
- Pay by invoice (required credit account).
- Don’t have a credit account? Contact us on *support@olasio.com*



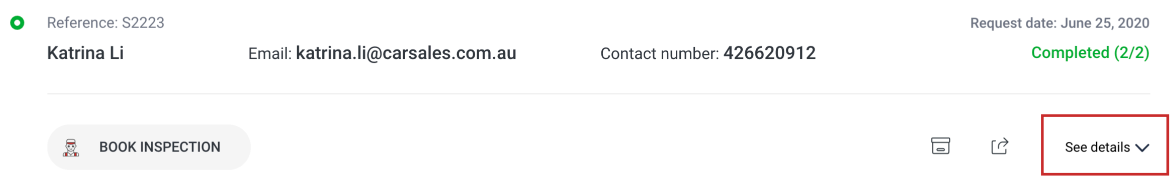
5. Managing requests

Each confirmed request will have a coloured icon to display its status:

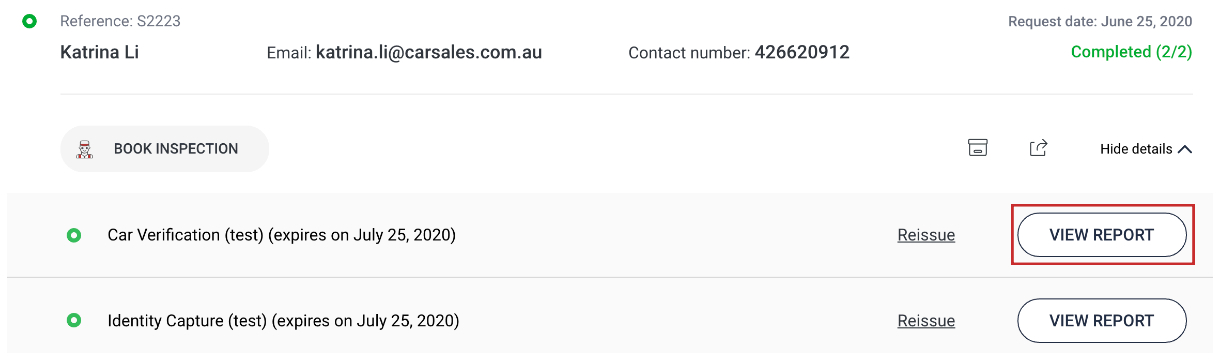
- Request has been sent to recipient but not yet started.
- Recipient has completed one or more but not all tasks.
- Recipient has completed and submitted all tasks.
- One or more reports have expired or have been archived.

5.1 VIEW TASKS & REPORTS

To view the tasks included in the request, select ‘See details’.



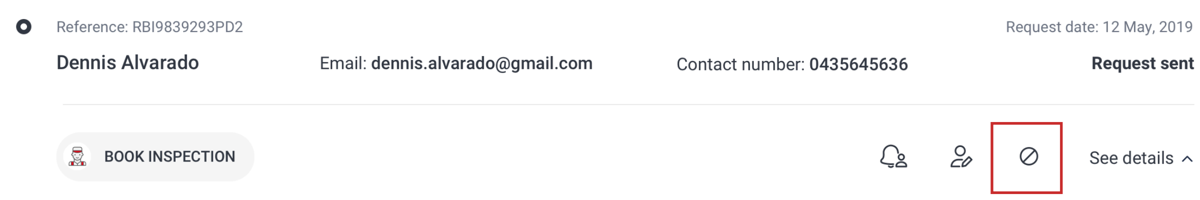
If the task is completed, you will be able to view the report.



5.2 CANCELLING THE REQUEST

You can cancel the request if none of the tasks have been started. Doing this will delete the request and deactivate the recipients link so that the tasks may no longer be performed.

You can find cancelled requests under the 'Archived' filter.

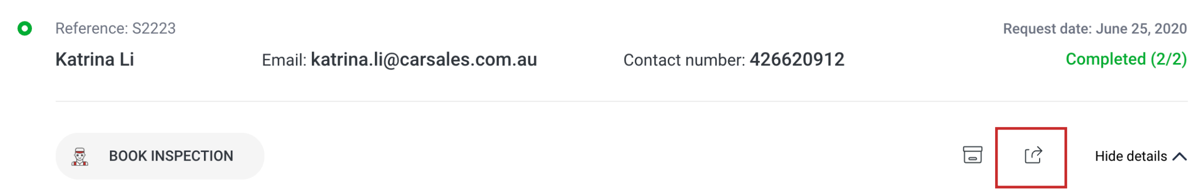


5.3 REPORT SHARING

Once a task is complete, you can share the password protected reports with people who don't have access to Olasio source. You can also remove the people you have shared the reports with.

5.3.1 Sharing with a new person

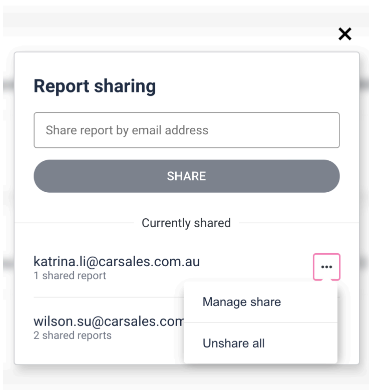
You can share to anyone by clicking share “ ” on the bottom right of the card, and enter the email address of the person you want to share the report to. You will need to provide a report access password, which you will need to send to the person you're sharing to. For security reasons, Olasio Source will only send the shared report link.



5.3.2 Sharing management

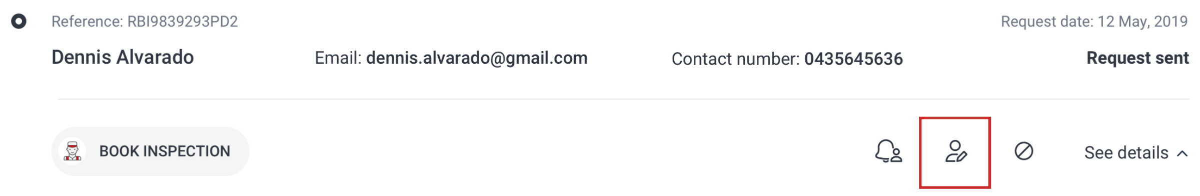
For a person who you had already shared a report with before, you can manage the shared link by clicking the share ” ” on the bottom right of the card, and select the email address from “currently shared” section, then you can add or remove the shared report from the email address that you have selected

Note: If you are sharing an additional report (with someone you had shared to already), you will be required to provide a new report access password. This new password will be applied to the existing shared report link and the new shared report.



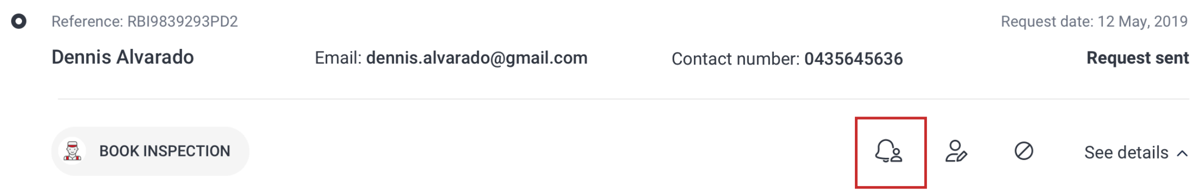
5.4 CHANGING RECIPIENT DETAILS

If your recipient did not receive the task due to incorrect contact information, you can change it. A new request email and SMS message will be sent.



5.5 SENDING A RECIPIENT REMINDER

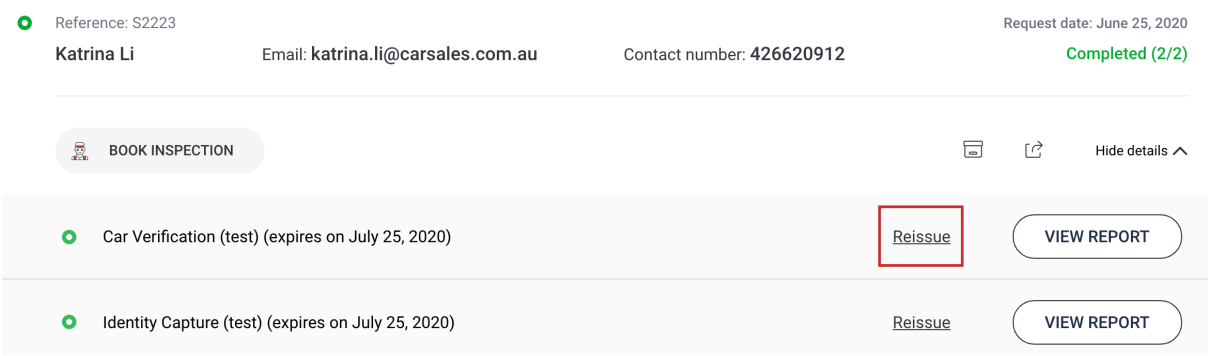
If your recipient has not completed their tasks and you would like to remind them, you can use this function to automatically send out a reminder to complete them. A new request email and SMS message will be sent.



5.6 RE-ISSUING A TASK

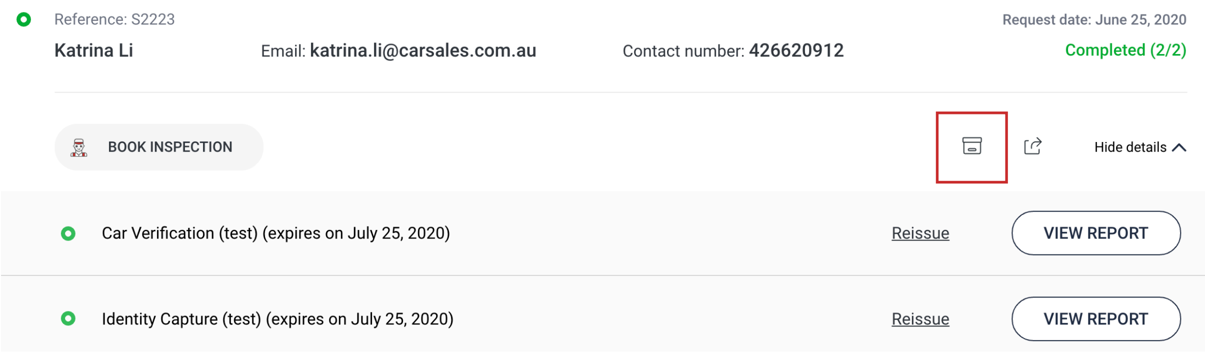
If a recipient completes a task and has missing or incorrect information, you can re-issue the task back to the recipient.

Note: In doing so, you will be unable to access the previous task/report completed.



5.7 ARCHIVING THE REQUEST

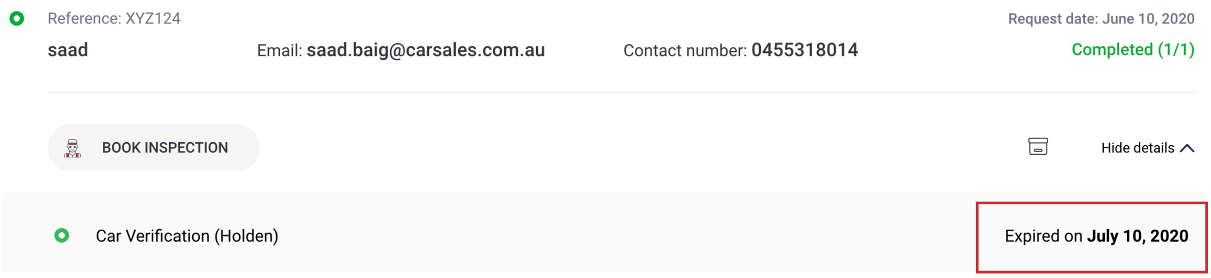
You can 'archive' older requests to remove them.



5.8 REPORT EXPIRY

Once a report expires, you will no longer be able to view or share it.

By default, reports expire after 30 days of completion.

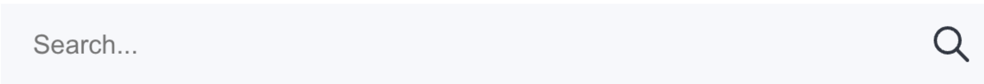


6 Search & Filter

6.1 SEARCH

Requests may be searched by a number of criteria:

- Click in the search bar and search for a request by: Name, Email, Contact number, Reference
- Click the search icon once you have typed in your search criteria



6.2 FILTERS

Requests can be found by status:

- By default all sent and completed requests are shown in the list displayed on the dashboard
- To filter results, select “filter” and select from the list of All, Sent, Completed, Archived to narrow down the list of displayed requests.
- Displayed results can be ordered by date created (ascending/descending), and date updated (ascending/descending) by clicking the dropdown box and selecting the order you would like the requests displayed in.

6.3 QUICK FILTERS

Quick filters can be applied by selecting one of the three main headings at the top of the dashboard. You can go back to full list by clicking “Back to dashboard”:

- “Recently completed requests” will display requests completed by your customers within the last 24 hours that have not yet been actioned.
- “Inactive requests” will display requests which have not yet received any updates from the customer for one week or longer.

- “Expiring requests” will display requests that contains reports that will be expiring in the next 3 days. All reports will expire 45 days after they have been generated.