

Quick Start Guide

Complete Admin Account Setup & Customer Onboarding

From new account registration through Shop Profile completion and first-scan readiness.

Important workflow rule: Complete and save the Shop Profile before performing the first scan. CenterPoint uses Shop Profile data to pre-fill company information on generated reports.

Example email used in this guide: **admin@yourshop.com**

If no custom shop logo is provided, CenterPoint default branding is used.

Prepared for customer onboarding • Version 1.0 • July 2026

Before You Begin

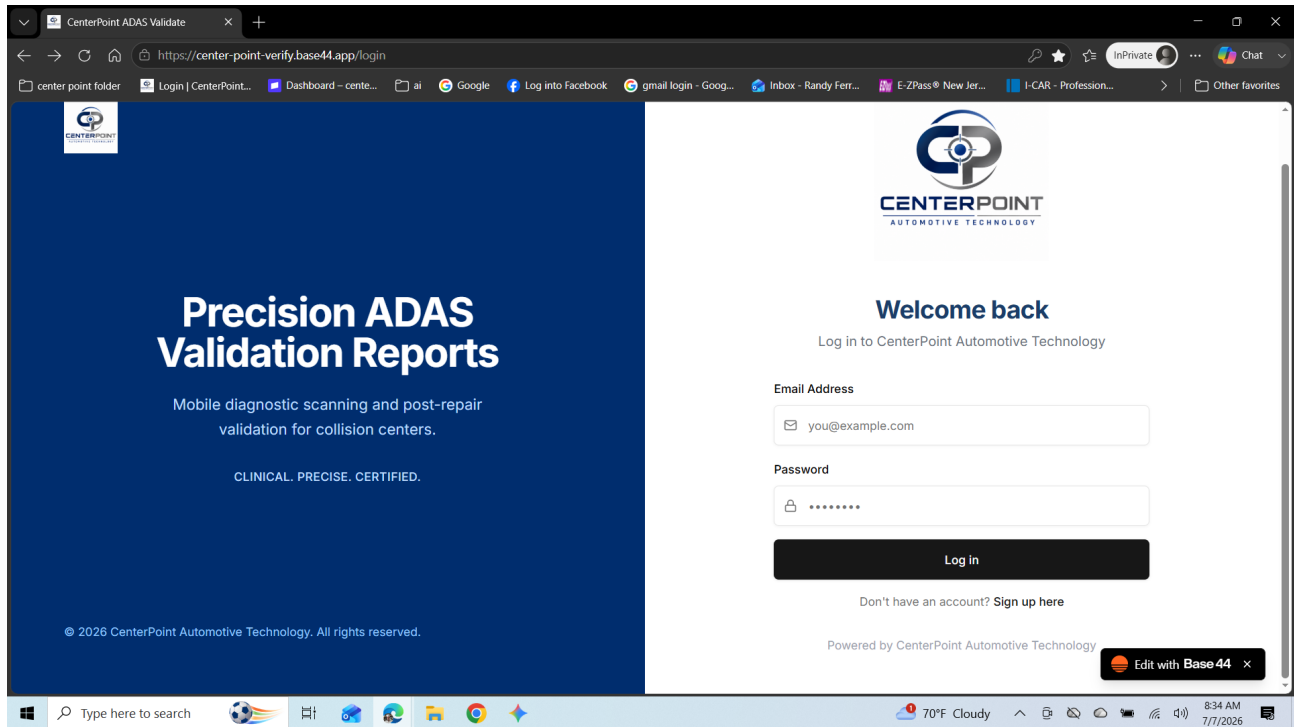
Have the following information available before starting:

- Your company or shop name.
- A working Admin email address that you can access immediately.
- A secure password.
- A valid subscription payment method.
- Your shop name, business address, phone number, optional Tax ID, and primary time zone.
- Optional: access to a Gmail or Outlook account if you want to configure report and invitation sending during onboarding.

Email connection may be skipped temporarily. If skipped, CenterPoint will show the email setup as incomplete. Technician invitations and report sending remain unavailable until a supported email provider is connected.

Step 1 — Open the Login Page and Select Sign Up

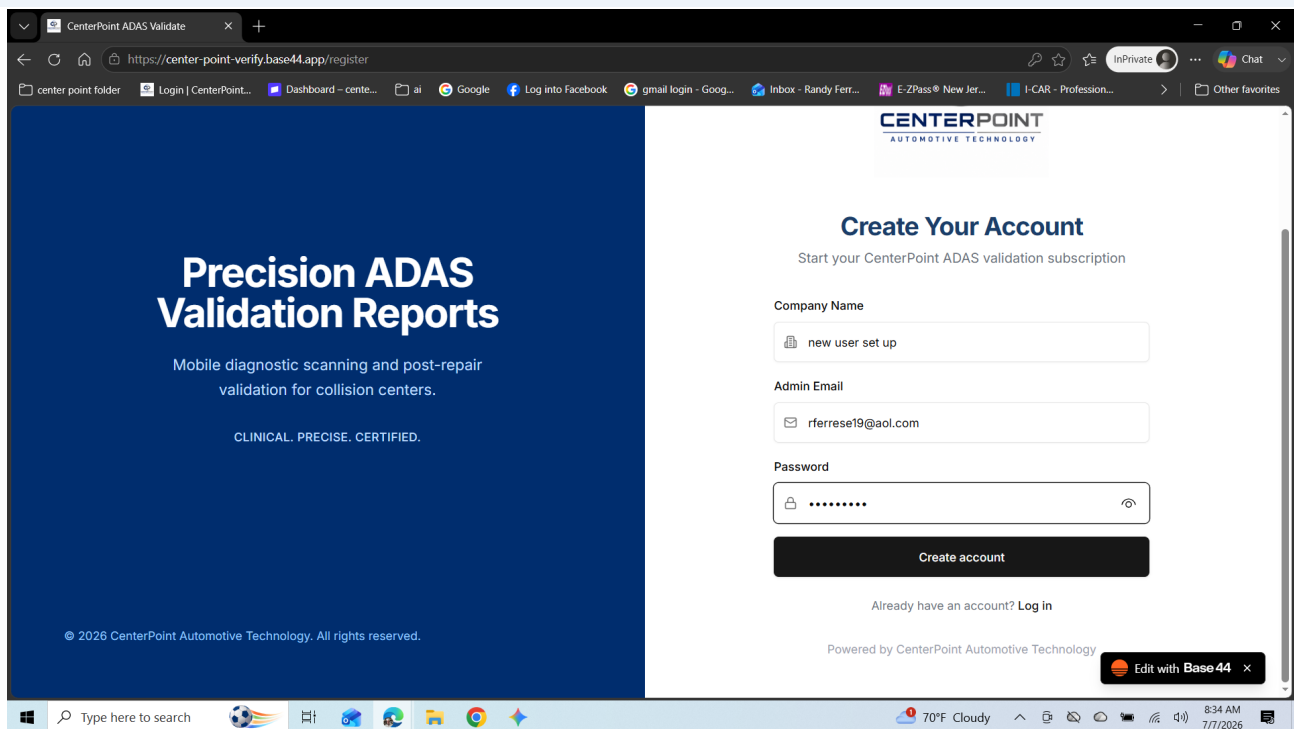
On the CenterPoint login page, new customers select **Sign up here** beneath the Log in button.



Step 2 — Create the Admin Account

Enter the company name, Admin email address, and a secure password. Select **Create account**. For public examples, this guide uses **admin@yourshop.com**.

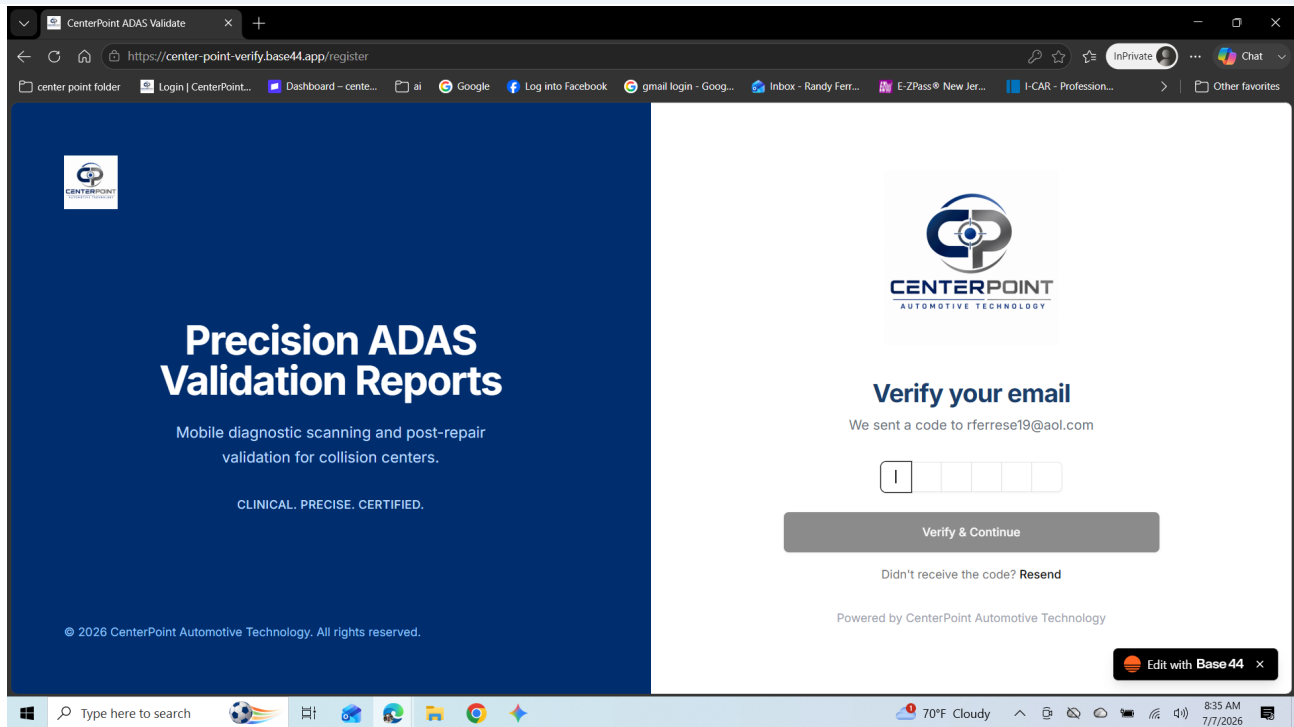
The Admin email becomes a key account identifier. Use an address controlled by the subscribing business.



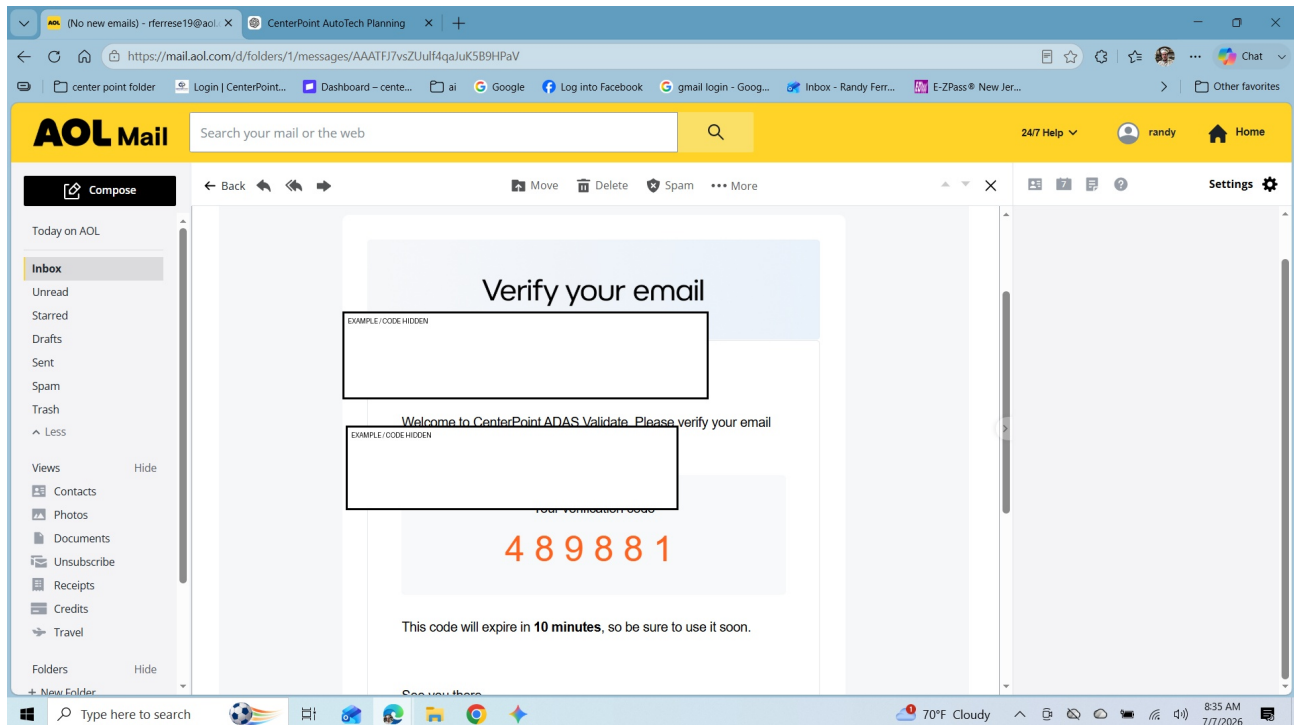
Step 3 — Verify the Admin Email

CenterPoint sends a six-digit verification code to the Admin email address. Open the message, retrieve the code, enter it on the verification screen, and select **Verify & Continue**.

Verification codes are time-limited. If a code is not received, use the **Resend** option.



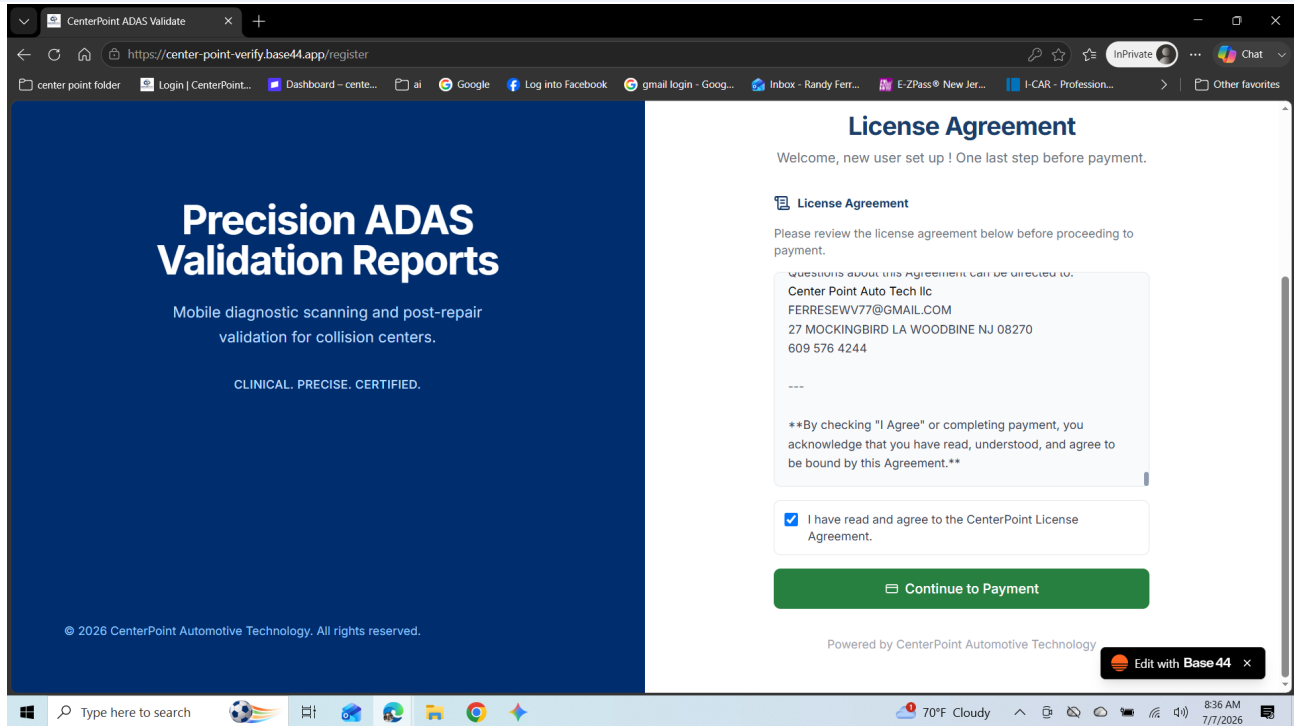
Example verification email shown below. The live test code and account-specific details have been removed.



Step 4 — Review and Accept the License Agreement

Review the CenterPoint License Agreement in the on-screen document window. After review, check the acknowledgment box confirming agreement, then select **Continue to Payment**.

License acceptance is part of the account onboarding record. Do not continue unless the authorized customer representative agrees.



Step 5 — Complete Subscription Checkout

Review the subscription plan and recurring price on the secure checkout page. Enter the requested contact and payment information, review the recurring billing authorization, and submit the subscription.

Payment is processed through the checkout provider. Never place full card numbers, expiration dates, or security codes in screenshots, support messages, or public guides.

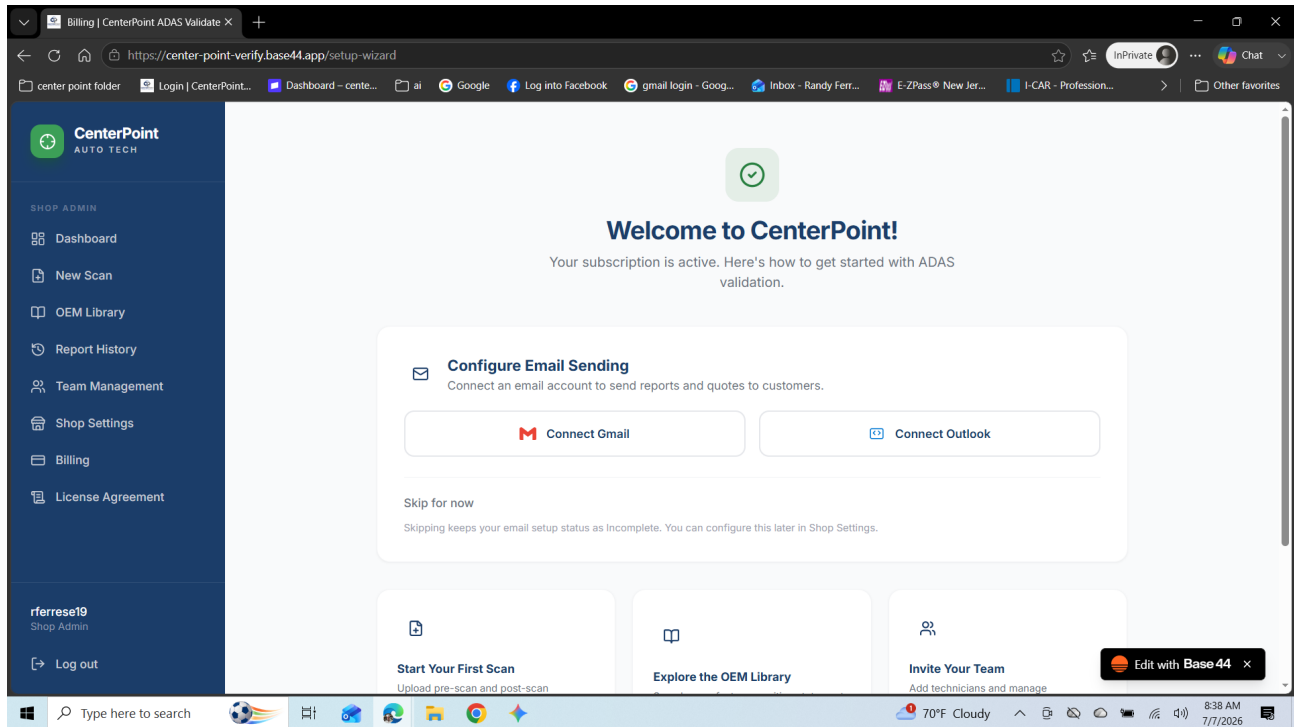
The screenshot shows a web browser window with the URL https://checkout.stripe.com/c/pay/cs_live_a1U54XWmlpdL24NZ07c13ggm3y2DsfG8eXvIzV2xe8x9QpCmW73c9RV5#fidnandhYHdWcXpYcc%2FJ2FgY2RwaXEnKSd.... The page is for "center point auto tech" and displays the subscription "CenterPoint ADAS Validate - Basic" for \$30.00 per month. The plan details include: "Per-seat subscription for CenterPoint ADAS Validate, Seat 1 (Admin)", "\$30/mo, Seats 2-6 \$12.99/mo each, Max 6 seats on Basic tier.", and "Qty 1, Billed monthly \$30.00 each". On the right, there are buttons for "link" and "amazon pay". Below these, there is a section for "Contact information" with an email field containing "email@example.com". The "Payment method" section shows options for "Card" (with Visa, Mastercard, and Apple Pay logos), "Cash App Pay", "Klarna", and "Bank" (with a "\$5 back" badge). A "Subscribe" button is at the bottom. A disclaimer states: "By subscribing, you authorize center point auto tech to charge you according to the terms until you cancel." The page is powered by Stripe and includes links for Terms and Privacy.

Sanitized example of the payment-entry screen. Live transaction details have been masked.

This screenshot is a sanitized version of the Stripe checkout page, showing the same subscription details as the previous image. The "Contact information" field now contains "rferrese19@aol.com". The "Payment method" section shows a masked card number "0000 0000 0000 0000" and a masked expiration date "00/00/00-00/00/00". The "Country or region" dropdown is set to "United States" with the zip code "08270". A checkbox at the bottom is labeled "Save my information with link for faster checkout". The page is powered by Stripe and includes links for Terms and Privacy.

Step 6 — Confirm Subscription Activation

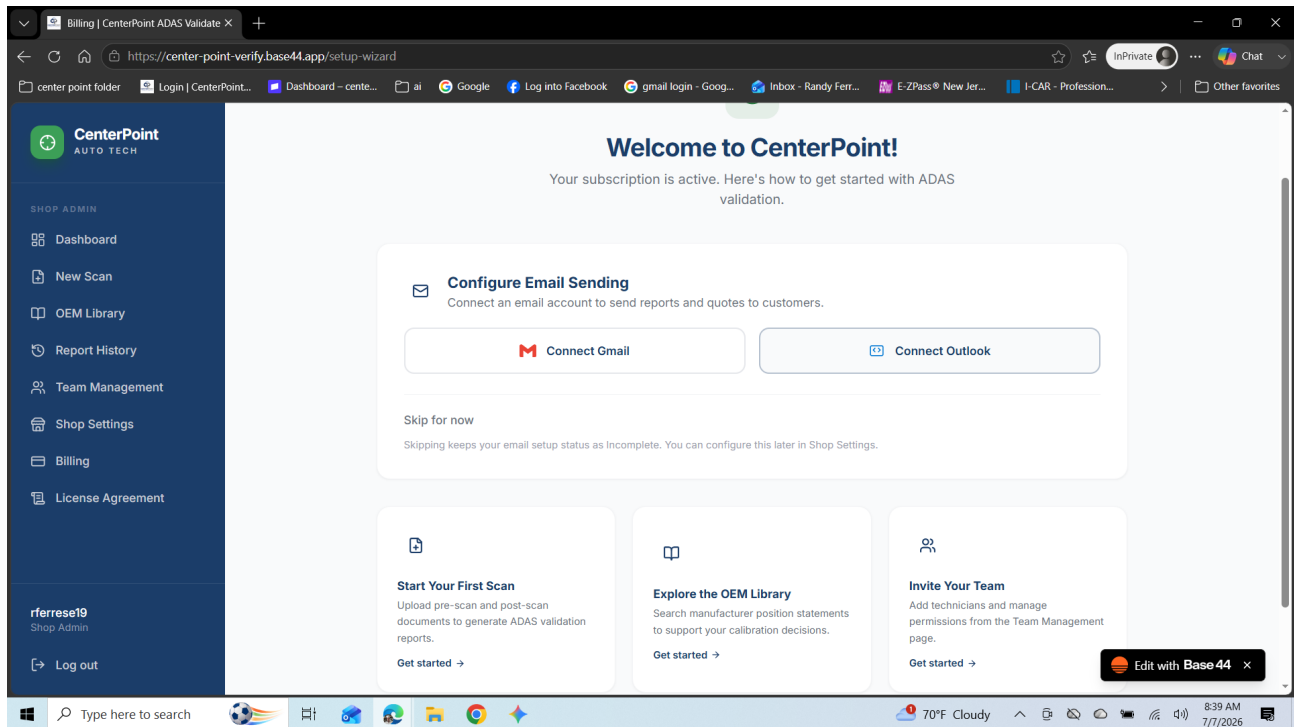
After successful payment, CenterPoint displays the welcome/setup screen confirming that the subscription is active.



Step 7 — Configure Email Sending or Skip Temporarily

Choose **Connect Gmail** or **Connect Outlook** to configure outbound email sending. If the email account is not ready, select **Skip for now**. Email setup can be completed later from Shop Settings.

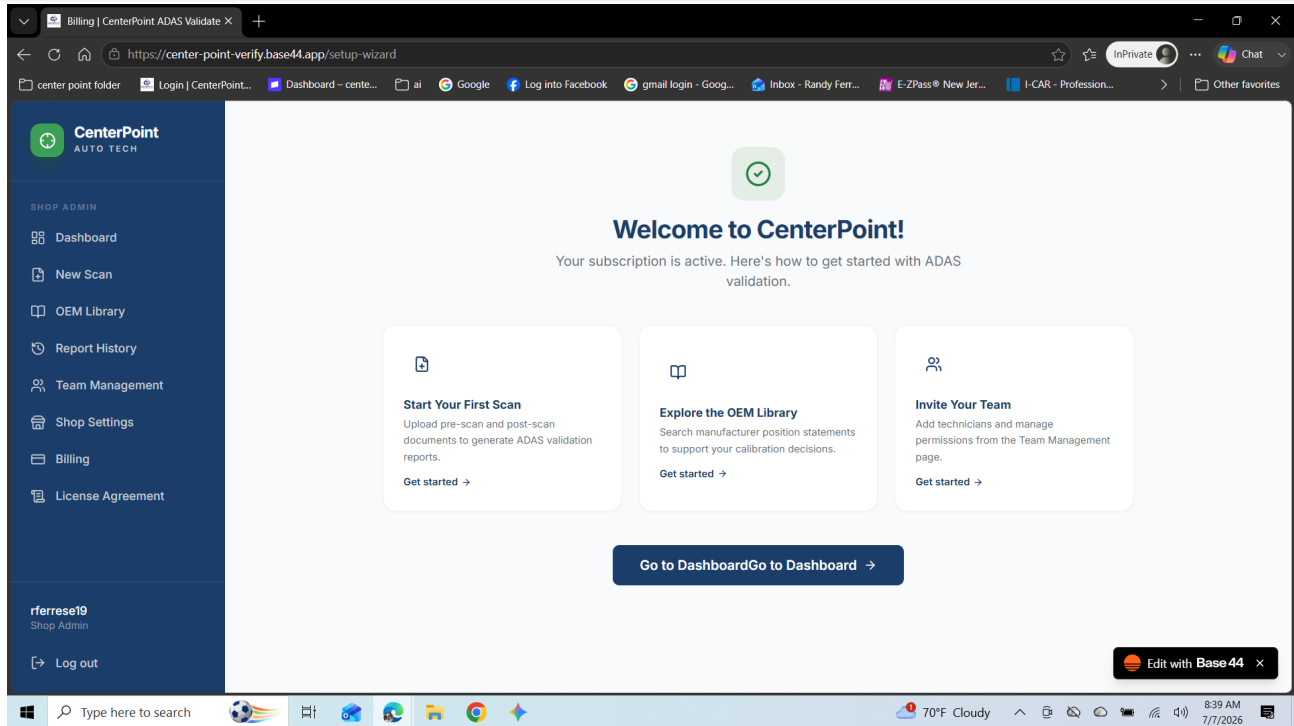
If skipped, the account can continue through onboarding, but technician invitations and report sending remain unavailable until an email provider is connected.



Step 8 — Review the Getting Started Screen

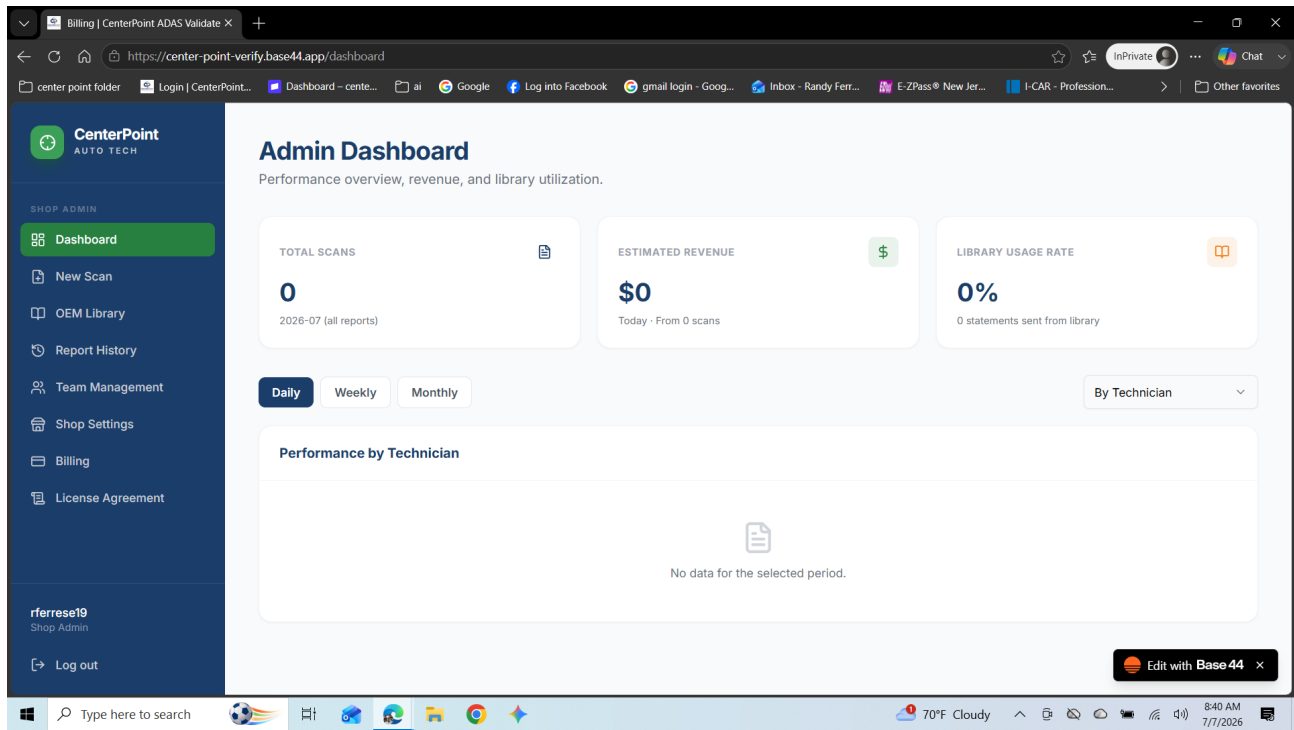
The setup screen presents shortcuts for starting a scan, exploring the OEM Library, and inviting the team. Proceed to the Dashboard, but **do not perform the first scan yet**.

Required sequence: complete Shop Settings / Shop Profile first so company information can populate generated reports.



Step 9 — Open the Admin Dashboard

The Admin Dashboard confirms that the Shop Admin account is operational. From the left navigation menu, select **Shop Settings**.



Step 10 — Complete the Shop Profile

Enter and verify the Shop Name, business Address, Phone Number, optional Tax ID, and Primary Shop Time Zone.

Why this step is required before the first scan: Shop Profile data is operational report data. CenterPoint uses saved profile information to pre-fill company identification on generated reports.

The screenshot shows the 'Shop Settings' page in the CenterPoint Auto Tech web application. The page is titled 'Shop Settings' with the subtitle 'Manage your shop profile and branding.' The left sidebar contains navigation links: 'SHOP ADMIN', 'Dashboard', 'New Scan', 'OEM Library', 'Report History', 'Team Management', 'Shop Settings' (highlighted), 'Billing', and 'License Agreement'. The user is logged in as 'rferrese19 Shop Admin'. The main content area has three sections: 'Shop Profile' with input fields for 'SHOP NAME' (quick start here), 'ADDRESS' (centerpointqs.com), 'PHONE NUMBER' (404 444 1234), and 'TAX ID# (optional)' (Enter tax ID...); 'Primary Shop Time Zone' with a dropdown menu set to 'Eastern Time (ET) — New York'; and 'Email Provider' with a note to connect a Gmail or Outlook account. A 'Base 44' watermark is visible in the bottom right corner of the page.

CenterPoint
AUTO TECH

SHOP ADMIN

- Dashboard
- New Scan
- OEM Library
- Report History
- Team Management
- Shop Settings**
- Billing
- License Agreement

rferrese19
Shop Admin

Log out

Shop Settings

Manage your shop profile and branding.

Shop Profile

SHOP NAME: quick start here

ADDRESS: centerpointqs.com

PHONE NUMBER: 404 444 1234

TAX ID# (optional): Enter tax ID...

Primary Shop Time Zone

All timestamps across the dashboard and report history will display in this time zone, regardless of the viewer's local computer settings.

IANA TIME ZONE: Eastern Time (ET) — New York

Email Provider

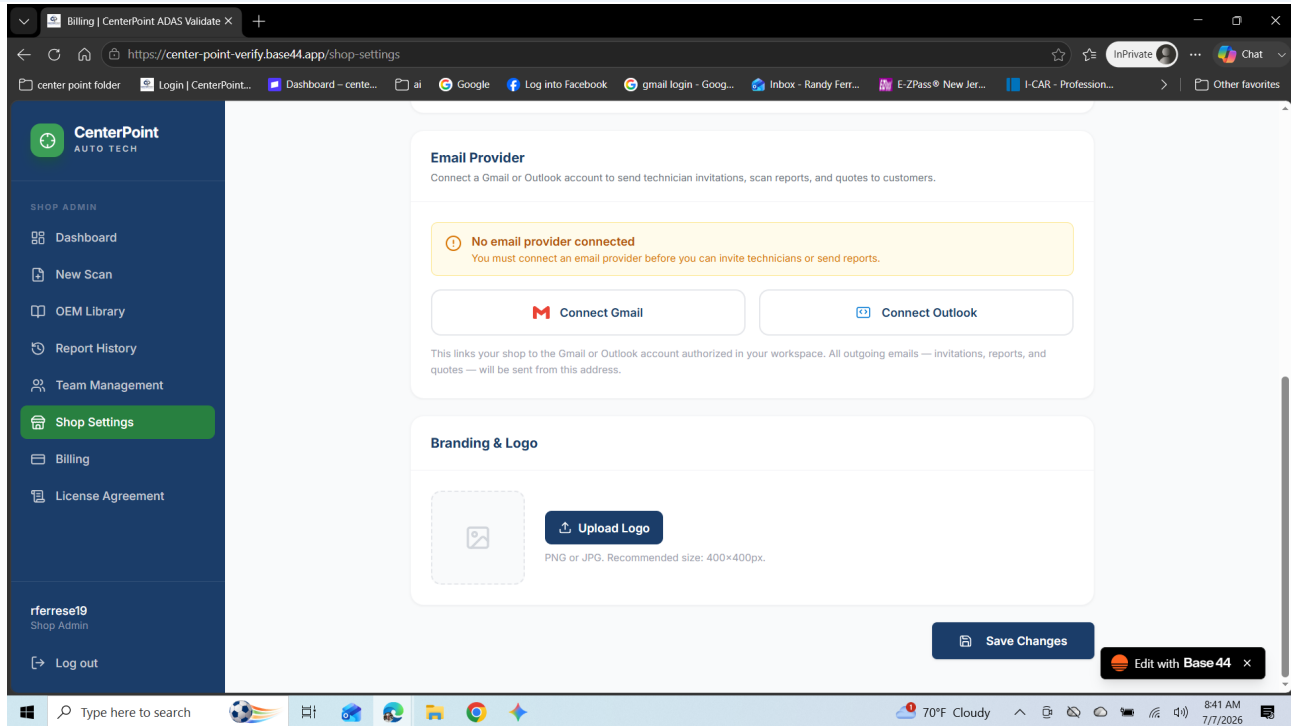
Connect a Gmail or Outlook account to send technician invitations, scan reports, and routes to customers.

Edit with Base 44

Step 11 — Review Email Provider and Branding Status

If email setup was skipped, Shop Settings displays **No email provider connected**. Connect Gmail or Outlook when ready. For branding, this onboarding guide assumes no custom logo is uploaded; CenterPoint default branding is used.

The software indicates that an email provider must be connected before inviting technicians or sending reports.



Step 12 — Save Changes and Confirm First-Scan Readiness

Select **Save Changes**. Confirm that the Shop Profile information is accurate and retained. Only after the profile is saved should the Admin proceed to the first scan.

Onboarding completion checkpoint: verified Admin account + accepted License Agreement + active subscription + saved Shop Profile. Email connection may remain incomplete only if the customer intentionally skipped it.

Onboarding Completion Checklist

- Admin account created.
- Admin email verified.
- License Agreement reviewed and accepted.
- Subscription payment completed and account activated.
- Email sending connected, or intentionally skipped for later completion.
- Shop Name entered and verified.
- Business Address entered and verified.
- Phone Number entered and verified.
- Optional Tax ID reviewed as applicable.
- Primary Shop Time Zone selected.
- Branding behavior confirmed; CenterPoint default branding used when no custom logo is provided.
- Shop Settings saved successfully.
- First scan begins only after Shop Profile completion.

Data-use note

Shop Profile information serves two functions: (1) account and shop administration, and (2) operational report generation. Because CenterPoint uses saved Shop Profile information to pre-fill company identification on generated reports, profile accuracy should be verified before the first scan and maintained whenever business information changes.

Security note

Do not share passwords, payment-card details, card security codes, or live verification codes in screenshots or public documentation. Use sanitized examples for training and support materials.