

CARBTest Website Manual - User Guide

December 2023

Abstract Explore the features of the CARBTest.org website and the interactions you can have on the site.

Admin

admin@carbtest.org

Table of Contents

CARBTest Account Registration	2
CARBTest Service Appointment Request	8
CARBTest Create Vehicle	11
CARBTest Create Action	14
CARBTest Service Appointment Cancel/Reschedule	28
CARBTest Contact	30
How to Add admin@carbtest.org Email to Your Safe Senders List	34
Microsoft Web Email instructions	34
Microsoft Outlook Desktop Instructions	36
Gmail Instructions	39
Microsoft Defender Instructions (Email Quarantine/Security)	41
Figure List	43

CARBTest Account Registration

1. Navigate to <u>Carbtest.org</u> and click on "Get started" button.



Figure 1. The "Get Started" button

2. Click on "My Account".



Figure 2. My account. If you already registered an account with carbtest.org, click on "My Account," then fill in your registered email and password to login.

3. Type in your email and password to login.

Email Password Remember me		CVKB.	TEST REFEREE	
	Email			
	Password			

Figure 3. The login page on CARBTest.org.

4. If you do not have an account, go ahead and click the "register" link on the bottom right of the login page, then complete the fields: name, email, password, and confirm password. click the "register" button.

	CARBTEST REFEREE
	d like to request a CARBTest service nt, please register following the steps bek
Name	
Email	
Password	
Confirm Pass	word
	Already registered?
	Already registered? Regist

Figure 4. The registration page.

5. If you're already registered for an account, you may click the "already registered?" link on the bottom right of the register page.

	Id like to request a CARBTest service nt, please register following the steps below
Name	
Email	
Password	
Confirm Pas	sword
	Already registered? Register
	1

Figure 5. How to return back to the login page.

6. You will be directed to the verify email page where you will be prompted to check your email for a verification email. otherwise, you may click the

"resend verification email" button to resend the verification email to the email inbox used at registration.



Figure 6. The verification page.

Please Note: Please ensure you've added <u>admin@carbtest.org</u> to your safe senders list per the <u>safe senders</u> section of this guide. If you use a Microsoft email and you're still having issues receiving the verification email - you may need to visit the website <u>https://security.microsoft.com/</u> to recover blocked emails.

 Check your registered email account for the verification email from <u>carbtest.org<admin@carbtest.org</u>>, and click on the email. The verification email will have the subject "Verify Email Address".

yahoo/mai	il	Search your m	ailbox			Q			Account Info 🗸	Go	Sign Out	Home
		Inbox	Contacts	Notepad	Calendar				Swit	ch to the	newest Yah	ioo Mail
Compose				面 Delete 🛭 🔯 Spa	am		« < 1	>				
Inbox	10	Select All		Actions V App	bly	Date: I	Newest on top $ \!$	Apply				
Drafts												
Sent Archive		Carbtes	st.org	Verify Email Addres	\$		1:37	PM 💼				
Spam	Ē											
Trash	Î											

Figure 7. Email inbox page with verification email.

8. The verification email will have a "verify email address" button. Please click the button to verify your account. Please check your spam or add admin@carbtest.org to your whitelist to receive the verification email.

Verify Email Address	
CR CARBTest Referee <admin@carbtest.org></admin@carbtest.org>	Forward
	12/5/2023 2:
If there are problems with how this message is displayed, click here to view it in a web browser. Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.	
CARBTest Referee	
Hello!	
Please click the button below to verify your email address.	
Please click the button below to verify you email address.	
Verify Email Address	
If you did not create an account, no further action is required.	
Regards,	
CARBTest Referee	
If you're having trouble clicking the "Verify Email Address" button, copy and paste the URL below into your web browser: https://test.carbtest.org/verify-email/20/d7ddbc1de939a17b125ad04e28e32d9a957b77db2	
expires = 17018186598/signature = 14adca441c996ff9ca240cda4ffb2450a92e16bd395e99525b6839cfe3759335	
© 2023 CARBTest Referee. All rights reserved.	

Figure 8. The verification email.

CARBTest Service Appointment Request

1. Once you finish Email Verification as described in the previous section, you will be directed to your CARBTest log in page, where you will input your registered email and password to log into your CARBTest account. You can also log into your CARBTest account from the carbtest.org homepage by clicking on "My Account," then fill in your registered email and password to log into your CARBTest account.

CARBTEST REFEREE	Information Se	rvices Careers	Contact	My Account
	u would like to request	a CARBTest servic ter for an account.		
About				
C C C	ALIFORNIA R RESOURCES BOARD	UCR	College of Engineering – Center for Environmental Research and Technology	
(CE-CERT) have partnered to provide	Referee services for the Calif to provide independent eval	iomia Clean Truck Che	ter for Environmental Research and Technology ck. The Clean Truck Check Referee (or also referred ehicles and services for vehicles with inspection	
News				
	© 2022 CARRTect	All Picker Porone		

Figure 9. CARBTest.org with the "my account" link shown at the top right

	CARB	TEST REFEREE	
Email			
Email			
Password			
Remem	ber me		
		Forgot your password?	Log i

Figure 10. Type in the email and password fields to login to your account on the carbtest.org login page.

2. Upon logging into your CARBTest account, you will be directed to your account's dashboard as shown below, click on "Get started ->" button.

	HECK Information Services Careers Contact Dashboard	د 🚯
	CARBTEST REFEREE	
	If you would like to request a CARBTest service appointment, please register for an account.	
	Get Started → User Guide	
А	bout	
	CALIFORNIA AIR RESOURCES BOARD	
(CE to a	e California Air Resources Board (CARB) and the University of California Riverside Center for Environmental Research and Technology E-CERT) have partnered to provide Referee services for the California Clean Truck Check. The Clean Truck Check Referee (or also referred as CARBTest) program's mission is to provide independent evaluations of heavy-duty vehicles and services for vehicles with inspection compatibilities or compliance issues.	
Ν	lews	

Figure 11. Once logged in, you will click "get started".

3. Then scroll down to access the dashboard page shown below. Click the "+ New Vehicle" button to add your vehicle into your CARBTest.org account.

CARBTEST REFEREE	1	nformation	Services	Careers	Contact	Dashboard	د 🔮
	Please add you		nd create : BTest Insp User Guid	pection	n to sched	lule your	
My Vehicles	(+ New Veh	icle –	ly Actions lease <u>Add Ve</u>	<u>hicle</u> to pro	ceed	
VIN RELATION You have no vehicles on your acc		LICENSE					

Figure 12. The "+ New Vehicle" button on the dashboard page.

CARBTest Create Vehicle

1. Once you click the "+ New Vehicle" button, you will be directed to the Create Vehicle page where you'll be able to input your VIN.

CLEAN TRUCK CHECK		Services	Careers	Contact	Dashboard	L	G
Create Vehicle							
A Home > Vehicles >	Create Vehicle						
Add or update	e vehicle information Relationship to vehicle	VIN Vehicle Iden	tification No	umber	*		
Relationship	Select Relationship 🛛 🔺						
	Plate		Country				
License	Plate	*	Select (Country	*		
	Year *	Make Select M	lake	*			
Vehicle	GVWR				*		
	Year		Engine M	anufacturer			
	Year	*		Make	*		
	Family Number		Displacer	nent Cubic Cer	ntimeters		
Engine ⁽¹⁾					*		
	Displacement Cubic Inches		Displacer	nent Liters			
		*			*		
	Please select your prefered r	regions for CA	RBTest serv	ces			
Area	select all that apply				*		
Preference	Type in any additional locatio	on information	(e.g. City, Z	(ip code etc.)			
I certify that	information submitted is true	and correct.	k				
				В	ack Save		

Figure 13. The CARBTest "Create Vehicle" page is shown above.

Home > Vehicle	es > Create Vehicle			
	cle Information vehicle information		0 - VIN dece	oded clean. Check Digit (9th position) is correc
	Plate	Cou		
License	Plate	Se	elect Country.	. 0
Vehicle	Year M SVWR	take ≎		
	Year	Engine Manufacturer	× o	Engine Make Other
Engine 0	Family Number	Displacement Cubic Cer		Displacement Cubic Inches
	Displacement Liters			

Figure 14. Upon entering a VIN, vehicle information populates in the blank fields.

 Once you've completed the form, please ensure you check the box stating, "I certify that information submitted is true and correct" as a warning shows stating "The certify vehicle must be accepted".
 Otherwise, you will not be able to submit the vehicle information.



Figure 15. The checkbox to certify the information is correct.

3. Click the "Save" button to continue.



Figure 17. A popup notification will show at the lower right. The description states, "Vehicle saved Your vehicle information was successfully saved".

Your vehicle has been added. My Vehicles My Actions	
My Vehicles + New Vehicle My Actions +	
	New Action
VIN RELATION YEAR MAKE LICENSE KS3085 Vehicle Owmer (not Operator) 2019 FREIGHTLINER GW2300HM C 1	

Figure 18. The banner shows at the top of the Dashboard page, "Your vehicle has been added".

	Das	shbo	ard					
	Duc	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	ara					
ly Vehicles	i			+ 1	New Vehicle	My Actions		+ New Actio
าท	RELATION	YEAR	MAKE	LICENSE		VIN	ACTION TYPE	
KS3085	Vehicle Owner (not Operator)	2019	FREIGHTLINER	GW2300HM	2 🖞			
FK4762	Vehicle Owner (not Operator)	2015	FREIGHTLINER	1234567GW	2			
432658	Operator (not vehicle owner)	2015	KENWORTH	12345567	2 0			
138814	Other	2015	KENWORTH	1323435435	2 🖞			
			٨RI			ome to	FEREE	
							ease visit our schedule page	

Figure 19. Your Dashboard page will update with a list of vehicles.

CARBTest Create Action

 View the right-hand side of the Dashboard page which has the My Actions section. Once you've created vehicles, you can Click the "+ New Action" button and assign actions such as assigning a referee tracking number to a vehicle created (based on its VIN in the system).

My Actions		+ New Action
VIN	ACTION TYPE	1

Figure 20. The "+ New Action" button.

		Information Services	Careers Contact	Dashboard	- 0	
	« Back Create Action					
Actio	2 Profile Info	Request	Info	4 Extra Info	V V	Confirmation
		© 2023 CARBTest Referee.	All Rights Reserved.			

Figure 21. The "create action" page.

2. Click and select the appropriate fields for the drop-downs for (1) action type and (2) VIN.

CARBTEST REFEREE	Information	Services	Careers	Contact	Dashboard	L	
« Back Create Action							
Action Type 2 Profile Info		3 Vehicle	nfo	4 E	xtra Info	Confirm	ation
Please select reason for your CARBTes	st service Reque	st					
Action Type							
Select Action						~	
Select Action							
State-directed CARBTest testing							
Engine change verification							
Alternative fuel system retrofit verification	1						
Motor home conversion verification							
Parts Unavailability - Compliance time ext	ension request						
Test result dispute							
Credentialed tester not available							
Test incompatibility/Alternative test proce	edure						

3. Enter the (3) RTN (if needed) for your action type. You can find your RTN on your CARB notice. Please contact <u>admin@carbtest.org</u> and provide your VIN if you're unable to locate your RTN.

CARBTEST REFEREE	Information Services Careers Contact Dashboard	6					
« Back Create Action							
Please select reason for your CARBTest Action Type State-directed CARBTest testing Select this option if you received a no	otice from Calif	st Fornia Air Rese	ources Board	l (CARB) dire	ecting your vehicle	↓ v	mation
Referee Tracking Number (RTN)					(V Next	>

Figure 22. Click the "next" button on the "create action" page.

If No Vehicles are added under your Account

If you select the "Create Vehicle..." option from the dropdown, the create vehicle page will populate to update vehicle information (<u>See page 70</u>).

If an Existing Vehicle is added under your Account

If there's a vehicle already added, you will be able to select a VIN from the "Select Vehicle" dropdown.

4. After entering your (1) action type, (2) VIN, and (3) RTN, and clicking "next", you will be directed to the "Update Profile Information". You may update your: Display Name, First Name * (required), Last Name * (required), Company * (required), Mobile Phone, Home Phone, Work Phone (* at least one phone number is required), and email, if necessary, on the Profile Info step.

	ECK	Information	Services	Careers	Contact	Dashboard		L (
« Back Cr	eate Action									
 Action Type 	Service Profile Inf	fo	3 Vehicle	Info	4	Extra Info —	Conf	irmatic		
Update P	rofile Information									
Update your account's profile information and email address.										
Display Name										
Display Name										
First Name										
First Name										
Last Name										
Last Name										
Company										
Company										
Phones										
Mobile	Mobile Phone number						Allow SMS*			
Home	Home Phone number						Allow SMS*			
Work	Work Phone number						Allow SMS*			
*Message an	d data rates may apply									
Email										
🖂 Email										
							Back Next			



« Back

Action Type

Create Action

Profile Info

Information	Services	Careers	Contact	Dashboard	

3 Vehicle Info	4 Extra Info	Confirmation
		0
		0
		0
		0

Display Nam		
Display Na		
The name fie	eld is required.	
First Name		
First Name	9	
The First Na	me is required.	
Last Name		
Last Name	2	
The last nam	e field is required.	
Company		
Company		0
The compan	y field is required.	
Phones		
Mobile	Mobile Phone number	Allow SMS*
Home	Home Phone number	Allow SMS*
Work	Work Phone number	Allow SMS*
You must pro	ovide at least one phone number.	
*Message ar	nd data rates may apply	
Email		
🔁 Email		
The email for	eld is required.	
The email he		

Figure 24. Required fields are highlighted in Red.

د 🕼

5. After completing your profile information, you will be directed to the Vehicle info page. Please complete the form to the best of your ability. After completing the fields, click "I certify that information submitted is true and correct" and then click "save".

tion Type	Profile Info	Vehicle Info 4	Extra Info Con
Update Vehicle Add or update vehi			VIN: 3AKJHHDR3KSKS3085
Relationship	Relationship to vehicle Vehicle Owner (\times *		
	Plate	Country	State
License	GW2300HM *	Other × *	Other × *
	GVWR Class 8: 33,001 lb and above (14,9	69 kg and above)	*
	Year	Engine Manufacturer	Family Number
Engine ^①	2019 × *		12345
	Displacement Cubic Centimeters 14800 *	Displacement Cubic Inches 903.151412602030	Displacement Liters 14.80 *
	Please select your prefered regions f	or CARBTest services	
	1 Riverside Co ×		× *
Area Preference	Type in any additional location inform	nation (e.g. City, Zip code etc.)	

Figure 25. Vehicle info form, certify checkbox, and "save" button.

6. After completing the vehicle information, you will be directed to the "edit action" page here you may upload any requested documents. Click the "Schedule Now" button.

TRUCK CHECK	Information Ser	vices Careers	Contact [Dashboard	L
Back Edit Action Home > Edit Action					
Schedule Appointment					
		Schedule No			
	This VIN is eligible to		unent.		
		1			
State-directed CARBTest te	created	Supporti	ng Documen	tation	
Vehicle:		Upload new	v File or Choos	e from my library	
GVWR: above)		Description			
Year: . Make: I		File descri	ation of comment		
Plate •					6
State Other Country Other		Choose Fi	le No file cho	sen	Submit
Edit Vehicle Info			_		
Created by 1 minute ago	Last update: 1 second ago				
Users	+ Add User	History			
Display Name:		Search		Columns 🗸	10 🗸
First Name: Last Name:		CREATED	AT INFO	MATION	
Company:		1 second	ago Vehic	e info updated by	
Email: Mobile:		1 minute	ago Actio	n created by	
Home: Work:	Edit User Info	Showing 2 re	sults		
NAME EMAIL RELA					
2 - PRIMARY USER 🗮 - PI					
- PRIMONT USER X - PI					

Figure 26. Edit action page. From your Dashboard, you can also edit your action. From the edit action page, going clockwise - you can schedule an appointment, upload requested information, see the history of your action, view your account information, and view your vehicle information.

7. Upload the required supporting documentation for your selected action type. A PDF will be sent you via email from admin@carbtest.org identifying the required items. Click the "Submit" button to upload those items.

apporting	Documentation	
Jpload new Fi	le or <u>Choose from my lik</u>	orary
escription		
File description	n of comment	
		10
Choose File	No file chosen	Submit

Figure 28. The "Supporting Documentation" section at the top right of the "edit action" page. The "Submit" button.



Figure 27. There are 8 different PDF(s) showing information required to verify your appointment based on the action type. Please upload the requested images and documents on your carbtest.org dashboard (edit action page) for a faster inspection service. 8. After you click the "Schedule Now" button on the "edit action" page, you may see the Calendar not load on slower connection speeds.



Figure 29. If your schedule appointment page does not load, refresh the page with the steps below.

9. You may need to refresh your page. Please either 1) Click the "Reload" button to the left of the address bar where the site is typed in or 2) Right Click > "Reload" on the page. Or 3) click the "Refresh Page" button as seen in "Figure 29"

← ← C → test.carbtest.org/schedule/1NPVD29X7AD112870?schedulenow=true

Figure 30. the "reload" button on the left-hand side of the address bar shown above. Click the "reload" button.



Figure 31. right-clicking on the page will show as the 3rd option down, a "reload" option. click "reload".

See image on the left. If you right click on the page, you will be given the option to Reload the page on the third row down.

Ctrl+R

You can also hold the buttons "CTRL" and "R" on your keyboard to Reload the page.



If neither of those work, try clicking the reload button next to the address bar.

10. On the scheduling page, select your preferred testing location in the dropdown menu and click on "Submit".

	on Services Careers Contact Dashboard	د ()
Back Schedule An Appoint Home > Schedule An Appointment	intment	
Schedule your CARBTest Appointment	Which location would you like to schedule *	
© 2023 C	CARBTest Referee. All Rights Reserved.	

Figure 32. The schedule your CARBTest appointment page.

11.Select available date/time.



Figure 33. The CARBTest Appointment page.

12. Click on the "accept" checkbox after entering your details. Click the "Schedule Event" button to confirm the CARBTest service appointment.

Schedub Appointments Image:	
---	--

Figure 34. The checkbox to "accept" the terms and the "Schedule Event" button.

13. Your CARBTest appointment schedule confirmation page.



14. Check your email for the scheduling confirmation. If you do not see the email in your inbox, please also check your spam (junk) box. In addition, please add our email address <u>schedulingcoordinator@carbtest.org</u> to your contacts or <u>safe senders</u> list to avoid our emails being marked as spam in the future. Please also check <u>https://security.microsoft.com/</u> if you don't see the email.

Event Name: CARBTest Appointment
Location: CE-CERT: 1084 Columbia Ave., Riverside, CA 92507 VIN: WD3PE8CD9HP540277
 Please complete the CARBTest.org Pre-inspection Form (https://forms.gle/5qKLckE5auFyYNgM8) . This must be completed prior to your scheduled appointment time. If you have any questions, please contact admin@carbtest.org. Thank youl Need to make changes to this event? Cancel: https://calendy.com/cancellations/87/dbf0/d-1334-462L-8f7d-c43e3b32/dbc Rescheduie-https://calendy.com/cancelduings/87/dbf0/d-1334-462L-8f7d-c43e3b32/dbc
When Monday Jul 10, 2023 · 4pm – 4:50pm (Pacific Time - Los Angeles)
Location CE-CERT: 1084 Columbia Ave., Riverside, CA 92507 View map
Guests View all guest info
Reply for phuong.ho@arb.ca.gov Yes No Maybe
More options

Figure 37. The scheduling confirmation email.

CARBTest Service Appointment Cancel/Reschedule

1. Click on the calendar invitation email in your email's inbox.

yahoo!mail	Search your mailb	юх		Q		Account Info	∽ Go
	Inbox C	ontacts Notepa	d Calendar				Switch to the r
Compose	Select All	面 Delete 🛭 😵 Span	Actions V Apply	Date: New	vest on top ~ Apply	≪ < 1 >	»
Inbox	scheduling	coordinator@ca 🕵 Invit	ation: 3HSYZAPR0GN4082	93 Southern Californ	ia CARBTest Appo	2:48 PM	Ē
Drafts	Carbtest.or	'g ☆ Verit	y Email Address			1:37 PM	Ξ.
Sent							
Archive							
Spam 💼							
Trash 💼							

Figure 38. The calendar invitation email shows your appointment has been requested.

2. Click on Cancel/Reschedule URL links to cancel or reschedule your appointment.

	Inbox	Contacts	Notepad	Calendar					
	🔦 Reply 🔌 R	Reply All 🔹 Forwa	ard		💼 Delete	😻 Spam	Actions ~	Apply	
I	am - 9:50an	n (PDT)		ern California Ca		ntmen (@ Tue Jun	27, 2023	39
	To:								
	ICS 2kB	2kB 31							
Đ		No name) Download							
	Event Na	ime: CARBTest A	opointment						
	Location:	: CE-CERT: 1084	Columbia Ave., Riv	verside, CA 92507					
	VIN: 3HS	YZAPR0GN40829	93	_					
		make changes to		↓					
				c8167fd4-faa9-4a6 lings/c8167fd4-faa					
	Rescheu	ule. <u>https://calent</u>	ary.com/rescriedu	1	13-400-0003-0032	200101000			
	When Tuesday	Jun 27, 2023 · 9a	m – 9:50am (Pacif	ic Time - Los Ange	eles)				
	Location		Ave., Riverside, C	A 92507					
	View map		riverside, U	- 32001					

Figure 39. You may click the cancel or reschedule links in your scheduling email to make changes to the appointment.

CARBTest Contact

1. If you have any questions or concerns, please direct your questions to either admin@carbtest.org or complete our message inquiry form on the contact page.



Figure 40. The fourth link on the navigation menu is shown above allowing you to navigate to the "Contact" page on carbtest.org



Figure 41. The "Contact" page has a form you can fill out with the following: Name*, Phone*, Email*, Select a reason*, and Your Message. It's recommended to add our email address <u>admin@carbtest.org</u> to <u>your whitelist</u>, so our emails go to your inbox instead of spam. Once again, you can also check <u>https://security.microsoft.com/</u> to recover the verification email in case the email was quarantined (if you use a Microsoft email).

Select a reason*

CARBTest scheduling

Search here

CARBTest scheduling

CARBTest appointment eligibility

State-directed CARBTest testing

Engine change

Alternative fuel system retrofit

Motor home conversion

Parts unavailability compliance time extension

Test result dispute

Credentialed tester not available

Inspection incompatibility/alternative test procedure

Other

Figure 42. The dropdown provides the following options: CARBTest Scheduling, CARBTest appointment eligibility, state-directed CARBTest testing, engine change, alternative fuel system retrofit, and motor home conversion. Under Select a reason*, click on the arrows to view a dropdown with the reasons for contacting CARBTest.

Select a reason*

CARBTest scheduling

Search here

CARBTest scheduling

CARBTest appointment eligibility

State-directed CARBTest testing

Engine change

Alternative fuel system retrofit

Motor home conversion

Parts unavailability compliance time extension

Test result dispute

Credentialed tester not available

Inspection incompatibility/alternative test procedure

Other

Figure 43. The dropdown provides the following options: CARBTest Scheduling, CARBTest appointment eligibility, state-directed CARBTest testing, engine change, alternative fuel system retrofit, and motor home conversion.

× ¢

Q

Contact

Please fill out the online contact form below and we will contact you.

Select a reason*
٥
Your Message
test
The message must be at least 10 characters.
Please add our emy oddress (admin@carbtest.org)
to your contacts or artelist to avoid our emails being Submit marked as spam. The k you!

Figure 44. You must type at least 10 characters in the message box. This feature helps to prevent spam, so please enter a message longer than 10 characters. Once you've clicked the "submit" button, our CARBTest team will reach back out to you within 24 to 72 hours.

How to Add <u>admin@carbtest.org</u> Email to Your Safe Senders List

Microsoft Web Email instructions

Microsoft Link to Steps: Add recipients of my email messages to the Safe Senders List -Microsoft Support

- 1. Login to your Microsoft Web Email
- 2. Click Settings Gear icon at the top right of your page



Figure 45. The settings icon.

3. A popup window appears with your Email Settings on the "Layout" option

Settings	Layout	Layout	×
Q. Şearch settings × Image: Second and the second an	Compose and reply Smart suggestions Attachments Rules Sweep	Focused Inbox Do you want Outlook to sort your email to help you focus on what matters most? Sort messages into Focused and Other Don't sort my messages	
	Junk email Quick steps Customize actions Sync email Message handling Forwarding	Text size and spacing This will change the font size and number of messages. Small Medium Large Large	
	Automatic replies Retention policies S/MIME Groups	Message organization How do you want your messages to be organized? Image: Show email grouped by conversation Show email as individual messages Arrange the reading pane Newest on top Image: Show email conversation Image: Show email conversation Image: Newest on top Image: Newest on bottom	
Figure 16 Emgil	settings popular	window	×

Figure 46. Email settings popup window.

4. Click Junk email, it should be the 7^{th} option down under the "Mail" tab

Mail	Attachments
📰 Calendar	Rules
89 People	Sweep
Figure 47. Junk email option.	Junk email

5. Click + Add

Settings Q. Search settings × S General Mail Calendar S People	Layout Compose and reply Smart suggestions Attachments Rules Sweep Junk email Quick steps Customize actions Sync email	Junk email Blocked senders and domains Move email from these senders or domains to my Junk Email folder. + Add This list is empty.	Reminders D Image: Search list 9:00 AM Microsoft Teams N	
Create new folder	Message handling Forwarding Automatic replies Retention policies S/MIME Groups	Safe senders and domains Don't move email from these senders to my Junk Email folder. + Add adm @carbtest.org	✓ Search list	

Figure 48. The "Add" button.

6. Type admin@carbtest.org to add the email to your safe senders list, press the "Enter" key. Scroll down and click the "Save" button

Safe senders and domains

Don't move email from these senders to my Junk Email folder.

+ Add	✓ Search	list	
Example: a)c123@fourthcoffee.com for sender, fourthcoffee.com for domain.			
adra @carbtest.org		0	Û
 Only trust email from addresses in my Safe senders and domains list and Safe mailing lists Trust email from my contacts 			
Reporting			
When reporting phishing or junk, always ask me before sending a report.			
	Save	Discar	d
gure 49. The textbox to enter an email for your safe senders list.			

The "Save" button.

Microsoft Outlook Desktop Instructions

Link to Guide on Outlook Safe Senders List: How to Add to Safe Senders Lists

1. View Home or Default view of Microsoft Outlook Desktop







Figure 51. The full taskbar view.

2. Click 3 dots on the actions bar at the top of Outlook



3. Under the "Move & Delete" category, click Junk, then click Junk e-mail options...

					5		
8 √· \$\$~ Ħ		~					
	Move & Delete						
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Figure 53. Microsoft Outlook Desktop Home view and the taskbar with the "..." dropdown menu.

- 4. A pop-up window of junk email options appears. Click the "Safe Senders" tab. Click the "Add" button. Type "admin@carbtest.org" as a safe sender email address.
- 5. Click "OK"

Junk Email Options -		\times
Options Safe Senders Safe Recipient	s Blocked Senders	International
Email 2 n addresses or domain never to treated as junk email.	names on your Safe	Add
Add address or domain		×
Enter an email address or int added to the list. admin@carbtest.org Examples: tomeone@examp Also trust email from my Contacts Automatically add people I email to	e.com or @example.c	om om File
	K Cancel	Apply

Figure 54. The "Junk Email Options" window and the "Safe Senders" tab.

Gmail Instructions

Link to Guide on adding an email to your safe senders list via Gmail: <u>How To Add Email</u> <u>Addresses To Your Safe Senders List On Gmail - tinyEmail® Marketing Automation</u>

1. Click "Show search options" icon within your search engine box at the top right of your Gmail inbox

Q Search in mail	
□ - C :	Show search options

2. In the "From" field, type <u>admin@carbtest.org</u>. Click "Create filter".

From	admin@carbtest.org			
То	1			
Subject				
Has the words				
Doesn't have				
Size	greater than	•	MB	•
Date within	1 day	•		Ē
Search	All Mail			•
Has attac	hment			
			Create filter	Search
				icuroni

3. Click the check box "Never send it to Spam" Once marked click "Create filter".

Q	fr	rom:(admin@carbtest.org)		×	뱎
÷	<u>,</u>	When a message is an exact match for your search criteria:			
		Skip the Inbox (Archive it)			
		Mark as read			
		Star it			
		Apply the label: Choose label 👻			
		Forward it to: Choose an address Add forwarding address			
C		Delete it			
	2	Never send it to Spam			
	J	Always mark it as important			
		Never mark it as important			
		Categorize as: Choose category			
		Also apply filter to 4 matching conversations.			
N	ote	: filter will not be applied to old conversations in Spam or Trash			
6	2	Learn more	Cre	ate filte	er
	Do t	ches: from:(admin@carbtest.org) this: Never send it to Spam		edi	t delete

Figure 55. "Never send it to spam" Gmail filter setting.

Microsoft Defender Instructions (Email Quarantine/Security)

Even after adding an email address to your Safe Senders list, it may still be blocked due to Microsoft Defender blocking initial / new email senders that are unfamiliar (email senders that have not been repeat contacts).

Link to Microsoft Defender: <u>https://security.microsoft.com/</u>

Link to Instructions: <u>https://learn.microsoft.com/en-us/microsoft-365/security/office-365-security/tenant-allow-block-list-email-spoof-configure?view=o365-worldwide</u>

- 1. Click the link to Microsoft Defender
- 2. Select the email from admin@carbtest.org



Figure 56. Microsoft Defender Quarantine page.

3. Popup window appears in your browser to verify the email address. Click the 'release email' button. Check your inbox for the recovered email from admin@carbtest.org



Figure 57. "Release email" button in Microsoft Defender.

Figure List

Figure 1. The "Get Started" button2
Figure 2. My account. If you already registered an account with carbtest.org,
click on "My Account," then fill in your registered email and password to login3
Figure 3. The login page on CARBTest.org
Figure 4. The registration page4
Figure 5. How to return back to the login page
Figure 6. The verification page6
Figure 7. Email inbox page with verification email7
Figure 8. The verification email7
Figure 9. CARBTest.org with the "my account" link shown at the top right
Figure 10. Type in the email and password fields to login to your account on the
carbtest.org login page8
Figure 11. Once logged in, you will click "get started"
Figure 12. The "+ New Vehicle" button on the dashboard page
Figure 13. The CARBTest "Create Vehicle" page is shown above
Figure 14. Upon entering a VIN, vehicle information populates in the blank fields.
Figure 15. The checkbox to certify the information is correct
Figure 16. The "Save" button
Figure 17. A popup notification will show at the lower right. The description
states, "Vehicle saved Your vehicle information was successfully saved"
Figure 18. The banner shows at the top of the Dashboard page, "Your vehicle has been added"
Figure 19. Your Dashboard page will update with a list of vehicles
Figure 20. The "+ New Action" button
Figure 21. The "create action" page
Figure 22. Click the "next" button on the "create action" page
Figure 23. Profile info page
Figure 24. Required fields are highlighted in Red
Figure 25. Vehicle info form, certify checkbox, and "save" button
Figure 26. Edit action page. From your Dashboard, you can also edit your action.
From the edit action page, going clockwise - you can schedule an
appointment, upload requested information, see the history of your action, view
your account information, and view your vehicle information
Figure 27. There are 8 different PDF(s) showing information required to verify your
appointment based on the action type. Please upload the requested images

and documents on your carbtest.org dashboard (edit action page) for a faster inspection service
Figure 28. The "Supporting Documentation" section at the top right of the "edit
action" page. The "Submit" button
Figure 29. If your schedule appointment page does not load, refresh the page
with the steps below
Figure 30. the "reload" button on the left-hand side of the address bar shown
above. Click the "reload" button
Figure 31. right-clicking on the page will show as the 3rd option down, a "reload" option. click "reload"
Figure 32. The schedule your CARBTest appointment page24
Figure 33. The CARBTest Appointment page25
Figure 34. The checkbox to "accept" the terms and the "Schedule Event" button.
Figure 35. A scheduling confirmation email will be sent to the email you
provided. To modify your appointment, you can click the "cancel" or
"reschedule" link in your email27
Figure 36. CARBTest appointment schedule confirmation page
Figure 37. The scheduling confirmation email
Figure 38. The calendar invitation email shows your appointment has been
requested
Figure 39. You may click the cancel or reschedule links in your scheduling email
to make changes to the appointment
Figure 40. The fourth link on the navigation menu is shown above allowing you to navigate to the "Contact" page on carbtest.org
Figure 41. The "Contact" page has a form you can fill out with the following:
Name*, Phone*, Email*, Select a reason*, and Your Message. It's recommended
to add our email address admin@carbtest.org to your whitelist, so our emails go
to your inbox instead of spam. Once again, you can also check
https://security.microsoft.com/ to recover the verification email in case the
email was guarantined (if you use a Microsoft email)
Figure 42. The dropdown provides the following options: CARBTest Scheduling,
CARBTest appointment eligibility, state-directed CARBTest testing, engine
change, alternative fuel system retrofit, and motor home conversion. Under
Select a reason*, click on the arrows to view a dropdown with the reasons for
contacting CARBTest
Figure 43. You must type at least 10 characters in the message box. This feature
helps to prevent spam, so please enter a message longer than 10 characters.
Once you've clicked the "submit" button, our CARBTest team will reach back
out to you within 24 to 72 hours

Figure 44. The settings icon	34
Figure 45. Email settings popup window	34
Figure 46. Junk email option	35
Figure 47. The "Add" button	35
Figure 49. The textbox to enter an email for your safe senders list	36
Figure 50. Home tab of Outlook Desktop	36
Figure 51. The full taskbar view	36
Figure 52. The "more commands" option	37
Figure 53. Microsoft Outlook Desktop Home view and the taskbar with the ""	
dropdown menu	37
Figure 54. The "Junk Email Options" window and the "Safe Senders" tab	38
Figure 55. "Never send it to spam" Gmail filter setting	40
Figure 56. Microsoft Defender Quarantine page	41
Figure 57. "Release email" button in Microsoft Defender	42