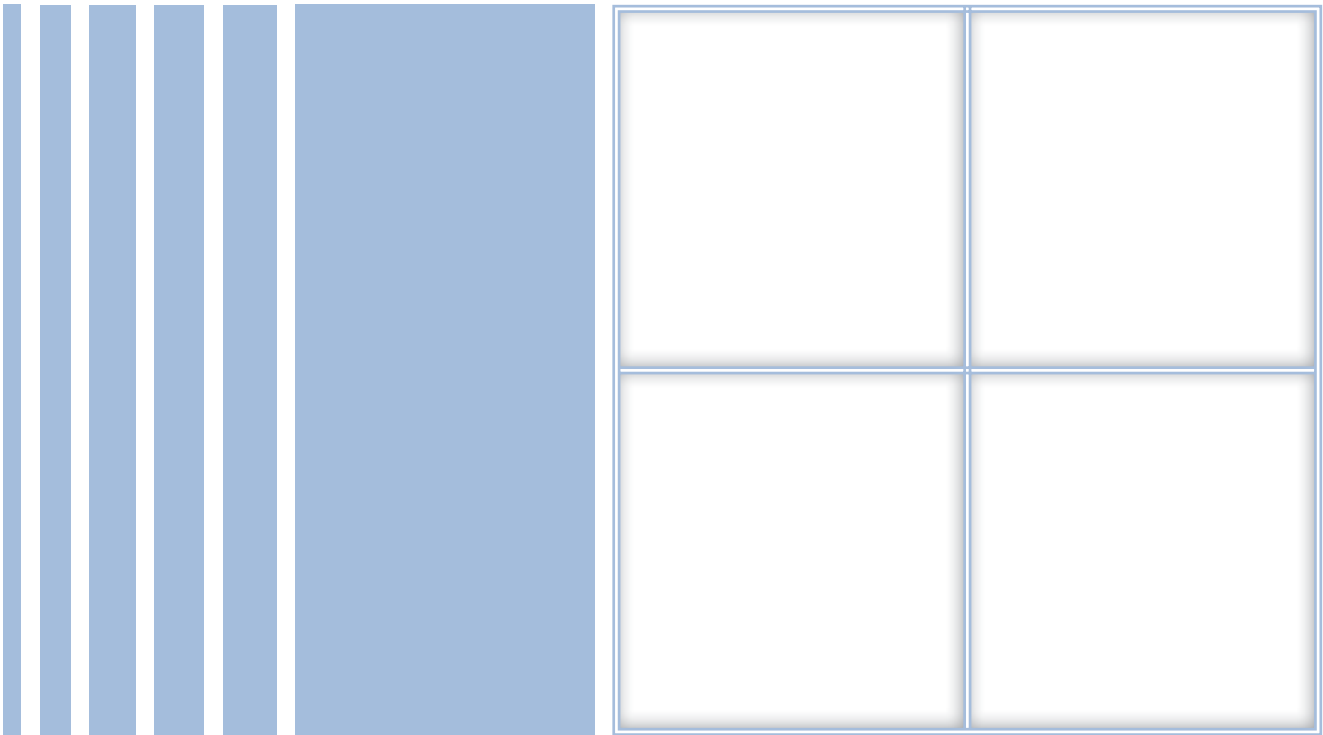


Repair Management

TMT - 101264
Class Course Code: SK1236
First Edition, September 2012

Using Service Estimating for Dealer Administrators Study Guide



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LESSON 1: INTRODUCTION

Welcome to the Navistar Repair Management training program – Using Service Estimating for Dealer Administrators. This program is designed to provide an opportunity for you to practice using the Repair Management System.

To receive credit for completing this program, you must take the post-test. This is the last item in the online course grade book for this program.

Administrative Tasks

In the Service Estimating Introduction program, you learned to complete both administrative and estimating tasks.

In this program, you will practice a number of these tasks, including:

- Managing your dealer information
- Editing a dealer-specific part
- Adding a custom labor operation
- Adding a special customer labor rate
- Mass-editing customers' estimating information
- Running a report

Estimating Tasks

In your role as Service Advisor, you will practice a number of estimating tasks, including:

- Adding a new customer
- Adding a new service contact
- Creating an estimate for an International truck
- Adding non-International trucks
- Transferring trucks
- Searching by customer to find an estimate
- Using the Find Estimate feature

NOTES

[illegible]

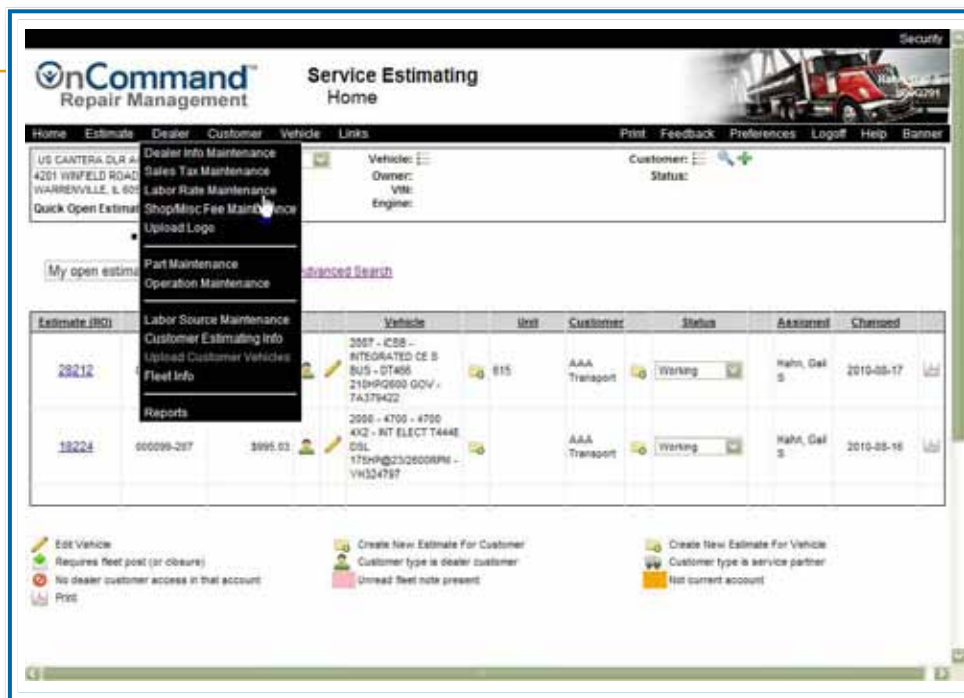
LESSON 2: UPDATING DEALER INFORMATION

Updating Labor Rates

In the following simulation, you'll practice updating a dealership's labor rates.

The current labor rates are a fairly flat structure, with A-, B- and C-level skill rates the same. The dealership has decided to differentiate its labor rates by changing the A- and B-level rates.

Labor rates are on the Labor Rate Maintenance screen, which you can access through the Dealer menu.



Please hover over Dealer in the menu bar. Click on Labor Rate Maintenance.

LESSON 2: UPDATING DEALER INFORMATION

OnCommand Repair Management Service Estimating Dealer Profile Maintenance

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CANTERA BUS ACCOUNT (66666667)
4231 WINDFELD ROAD
WARRENVILLE, IL 60055
Quick Open Estimate: [button]

Dealer Info Sales Tax Labor Rates Fees Logo Upload

Skill Level	Rate	Description
A	\$94.00	a
B	\$94.00	b
C	\$94.00	c
D	\$87.00	d
Body Shop	\$99.00	Body Shop
Trailer	\$99.00	Trailer
G	\$40.00	Current warranty rate

When setting your Dealer labor rates make sure the rate maintains compliance with the Warranty Policy and Procedures manual/CTS-1100 section 7.1.11.1. The approved warranty labor rate shall not exceed the lowest regular hourly rate which the Dealer charges its customers and will not be impacted by internal discounts, occasional customer discounts or discounts realized by using Diamond Estimating, Service Partner or any International provided solution shall not impact this rate given that the net customer invoiced amount is not below the warranty cost for the same repair.

[Save] [Cancel]

- To change the A-level skill rate to \$98.00, click on the current rate of \$94.00. Type in the new labor rate of 98.00 and press the Enter key.
- To change the B-level skill rate, click on the current value. Change the labor rate to 96.00 and press the Enter key.

When all changes are complete, click the Save button.

LESSON 2: UPDATING DEALER INFORMATION

Updating Fees

In the following simulation, you'll practice updating a dealership's fees.

Currently, a fixed hazardous waste fee of \$20.00 is applied to estimates. The dealership has decided to make this a variable fee of 10% of total parts with a minimum of \$20.00 and a maximum of \$100.00. The hazardous waste fee is on the Fees tab, which you can access from the Labor Rates tab.

The screenshot shows the 'OnCommand Repair Management' interface for 'Service Estimating Dealer Profile Maintenance'. The 'Fees' tab is selected in the top navigation bar. The main content area displays a table of labor rates with columns for Skill Level, Rate, and Description. The 'Fees' tab is currently selected, showing a table with columns for Fee Name, Rate, and Description. The 'Fees' tab is highlighted in the top navigation bar. The 'Fees' tab is currently selected, showing a table with columns for Fee Name, Rate, and Description.

Skill Level	Rate	Description
A	\$8.00	A
B	\$6.00	B
C	\$4.00	C
D	\$2.00	D
Body Shop	\$8.00	Body Shop
Trailer	\$8.00	Trailer
G	\$50.00	Current warranty rate

When setting your Dealer labor rates make sure the rate maintains compliance with the Warranty Policy and Procedures manual CTS-1100 section 7.1.13.1. The approved warranty labor rate shall not exceed the lowest regular hourly rate which the Dealer charges its customers and will not be impacted by internal discounts, occasional customer discounts or discounts realized by using Demand Estimating. Service Partner or any international provided solution shall not impact this rate given that the net customer invoiced amount is not below the warranty cost for the same repair.

Save Cancel

The Fees tab is right next to the Labor Rates tab. Click on it now.

LESSON 2: UPDATING DEALER INFORMATION

OnCommand[™] Repair Management Service Estimating Dealer Profile Maintenance

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CANTERA DLR ACCOUNT (000099207) 4201 WINFIELD ROAD, WARRENVILLE, IL 60555 Quick Open Estimate: [button]

Dealer Info Sales Tax Labor Rates **Fees** Logo Upload

Shop Supply Fees

Variable ☒ 10 % will be applied to the total of Parts and Labor with a minimum charge of \$ but not to exceed 100

Fixed ☐ Always apply a fixed shop fee of to the total estimate amount

Hazardous Waste Fees

Variable ☐ % will be applied to the total of None with a minimum charge of but not to exceed

Fixed ☒ Always apply a fixed shop fee of 25 to the total estimate amount

Save Cancel

Under Hazardous Waste Fees, you can see that a fixed fee is currently applied to estimates. To change to a variable fee structure, click on the radio button after Variable.

Now enter the percent to be applied to every estimate. Begin by clicking in the blank text box after Variable. Type in the percent – 10.

OnCommand[™] Repair Management Service Estimating Dealer Profile Maintenance

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CANTERA DLR ACCOUNT (000099207) 4201 WINFIELD ROAD, WARRENVILLE, IL 60555 Quick Open Estimate: [button]

Dealer Info Sales Tax Labor Rates **Fees** Logo Upload

Shop Supply Fees

Variable ☒ 10 % will be applied to the total of Parts and Labor with a minimum charge of \$ but not to exceed 100

Fixed ☐ Always apply a fixed shop fee of to the total estimate amount

Hazardous Waste Fees

Variable ☒ 10 % will be applied to the total of None with a minimum charge of but not to exceed

Fixed ☐ Always apply a fixed shop fee of 25 to the total estimate amount

Save Cancel

LESSON 2: UPDATING DEALER INFORMATION

The screenshot shows the 'OnCommand Repair Management' interface for 'Service Estimating Dealer Profile Maintenance'. The 'Fees' tab is active. Under 'Shop Supply Fees', there is a row for 'Variable' fees (10%) applied to 'Parts and Labor'. Under 'Hazardous Waste Fees', there is a row for 'Variable' fees (10%) applied to a dropdown menu. The dropdown menu is open, showing 'Parts' as the selected option. Other options include 'Labor', 'Parts and Labor', and 'None'.

- Now set the fee basis to Parts. Options for fee basis are available in the drop-down field in the center of this row. Begin by clicking on the drop-down arrow. Click on Parts.

LESSON 2: UPDATING DEALER INFORMATION

OnCommand Repair Management Service Estimating Dealer Profile Maintenance

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CANTERA OUR ACCOUNT (00099207) 4201 WINFIELD ROAD WARRENVILLE, IL 60555 Quick Open Estimate: []

Dealer Info Sales Tax Labor Rates Fees Logo Upload

Shop Supply Fees

Variable ☒ 10 % will be applied to the total of Parts and Labor with a minimum charge of \$ 5 but not to exceed 100

Fixed ☐ Always apply a fixed shop fee of [] to the total estimate amount

Hazardous Waste Fees

Variable ☒ 10 % will be applied to the total of Parts with a minimum charge of \$ 20 but not to exceed 100

Fixed ☐ Always apply a fixed shop fee of \$ 20 to the total estimate amount

Save Cancel

- Now set the current minimum charge to \$20.00. Begin by clicking in the blank text box after minimum charge of. Type the minimum charge – 20.
- Now set the maximum charge to \$100.00. Begin by clicking in the blank text box after but not to exceed. Type the maximum charge – 100.

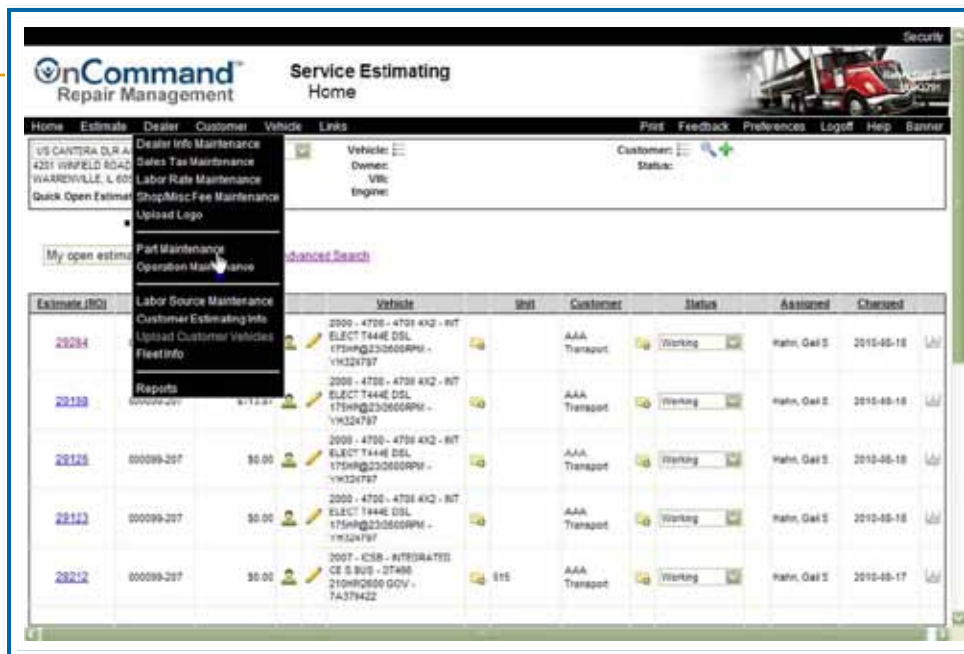
When all changes are complete, click the Save button.

This image shows a single page of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page, typical of notebook paper. There are no margins, text, or other markings on the page.

LESSON 3: EDITING PARTS

- In the following simulation, you'll practice editing a custom dealer part. The dealership is using a new vendor requiring a different price structure for Retail, Trade, Major Fleet, National Fleet, and Dealer Net prices.

Custom dealer parts are located on the Part Maintenance screen, which you can access through the Dealer menu.



Please hover over Dealer in the menu bar.
Click on Part Maintenance.

LESSON 3: EDITING PARTS

OnCommand Repair Management Service Estimating Parts Maintenance

Home Estimate Dealer Customer Vehicle Links Post Feedback Preferences Logout Help Banner

US CANTERA DLR ACCOUNT (50099207)
4201 WIRFIELD ROAD
WARRENVILLE, IL 60555
Quick Open Estimate: [icon]

9 records were found

Dealer Parts Upload Parts

Number	Name / Vendor / Description	Retail	Trade	Major Fit	National Fit	Dealer Ret	Fixed	Fixed Price	Core	Edit	Delete
	Name: [input] Vendor: [input] Desc: [input]	0.00	0.00	0.00	0.00	0.00	0.00		0.00	+	
7955- LF6331188	Arm Rest Chancellor Arm Rest	62.40	60.11	57.18	57.00	48.48	0.00	N	0.00		Delete
712060481M3	REMAN CYLINDER HEAD E7 Captive REMAN CYLINDER HEAD E7	863.17	685.36	486.11	486.00	591.27	0.00	N	5.00		Delete
716080439EX	Vendor REMAN RUJECTOR 4V/E7 AIR COMP (550)	112.94	89.60	60.60	55.00	77.30	0.00	N	5.00		Delete
745-X1108000	Vendor AIR COMP (550)	743.34	394.82	291.47	300.00	341.28	0.00	N	0.00		Delete
895- 1234531702	Vendor AIR REST gala direct	66.51	47.49	36.58	43.00	41.54	0.00	N	0.00		Delete

The dealership is now sourcing an arm rest from a new vendor. This is the first part in the list. To edit the part, click the Pencil icon at the end of the row.

The new vendor name is Harrison. Begin by clicking on the current Vendor name. Type in Harrison.

OnCommand Repair Management Service Estimating Parts Maintenance

Home Estimate Dealer Customer Vehicle Links Post Feedback Preferences Logout Help Banner

US CANTERA DLR ACCOUNT (50099207)
4201 WIRFIELD ROAD
WARRENVILLE, IL 60555
Quick Open Estimate: [icon]

Dealer Parts Upload Parts

Number	Name / Vendor / Description	Retail	Trade	Major Fit	National Fit	Dealer Ret	Fixed	Fixed Price	Core	Edit	Delete
	Name: [input] Vendor: [input] Desc: [input]	0.00	0.00	0.00	0.00	0.00	0.00		0.00	+	
7955- LF6331188	Arm Rest Chancellor Arm Rest	62.40	60.11	57.18	57.00	48.48	0.00	N	0.00		Delete
712060481M3	REMAN CYLINDER HEAD E7 Captive REMAN CYLINDER HEAD E7	863.17	685.36	486.11	486.00	591.27	0.00	N	5.00		Delete
716080439EX	Vendor REMAN RUJECTOR 4V/E7 AIR COMP (550)	112.94	89.60	60.60	55.00	77.30	0.00	N	5.00		Delete
745-X1108000	Vendor AIR COMP (550)	743.34	394.82	291.47	300.00	341.28	0.00	N	0.00		Delete
895- 1234531702	Vendor AIR REST gala direct	66.51	47.49	36.58	43.00	41.54	0.00	N	0.00		Delete

LESSON 3: EDITING PARTS

Number	Name / Vendor / Description	Retail	Trade	Major Fleet	National Fleet	Dealer Net	Fleet	Fleet Price	Core	Edit	Delete
	Item:										
	Vendor:	0.00	0.00	0.00	0.00	0.00	0.00		0.00		
	Desc:										
	Item:										
7005-LP3331C	Vendor: Partman	61.80	60.00	56.80	55.20	48.49	0.00		0.00		
	Desc: Arm Rest										
722GB3451M3	REBAN CYLINDER HEAD E7	883.17	805.36	486.11	486.86	391.27	0.00	N	5.00		
	Caprive										
716GB145M3	REBAN CYLINDER HEAD E7	112.34	26.85	80.83	55.85	77.30	0.00	N	5.00		
	Vendor										
745-X110886	REBAN REFLECTOR 4V E7	743.34	394.82	291.47	300.00	341.28	0.00	N	0.00		
	Vendor										
	AIR COMP (350)										
	AIR COMP (550)										
	AIR REST										

- Next update the value for Retail Price. Begin by clicking on the current Retail Price. Type in 61.80.
- Next update the value for Trade Price. Begin by clicking on the current Trade Price. Type in 60.00.
- Next update the value for Major Fleet Price. Begin by clicking on the current Major Fleet Price. Type in 56.80.
- Next update the value for National Fleet Price. Begin by clicking on the current National Fleet Price. Type in 55.20.
- Next update the value for Dealer Net Price. Begin by clicking on the current Dealer Net Price. Type in 48.12.

When all changes are complete, save them by clicking the green checkmark at the end of the row.

LESSON 3: EDITING PARTS

OnCommand[™] Repair Management Service Estimating Parts Maintenance

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CANTERA DLX ACCOUNT (800992257)
4251 WILFELD ROAD
WARRENVILLE, IL 60555
Quick Open Estimate:

Update completed

Dealer Parts Upload Parts

Number	Name/Vendor/Description	Retail	Trade	Manufacturer	National Fit	Dealer Net	Final	Final Price	Core	Edit	Delete
	Name: Vendor: Desc:	0.00	0.00	0.00	0.00	0.00	0.00		0.00		
7105-LF5311FE	Arm Rest Hankson Arm Rest	61.88	60.00	58.88	55.20	48.48	0.00	False	0.00		Delete
7120B3451MX	REMAN CYLINDER HEAD EP Castile	863.17	605.36	488.11	488.00	591.27	0.00	N	5.00		Delete
7180B343PEX	REMAN CYLINDER HEAD EP Vendur	112.84	89.80	60.90	55.80	77.30	0.00	N	5.00		Delete
745-X188808	REMAN RULECTOR 4V EP Vendor	743.54	584.62	291.47	306.80	341.28	0.00	N	0.00		Delete
895-1234231762	AIR COMP (550) AIR COMP (550) AIR REST Vendor	66.31	47.48	38.38	43.00	41.54	0.00	N	0.00		Delete

The entry for this arm rest is now updated with the new vendor and pricing.

NOTES

This image shows a full page of blank white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page, providing a template for writing or drawing. There are no margins, text, or other markings present.

LESSON 4: ADDING AN OPERATION

- In the following simulation, you'll practice adding a custom dealer operation.

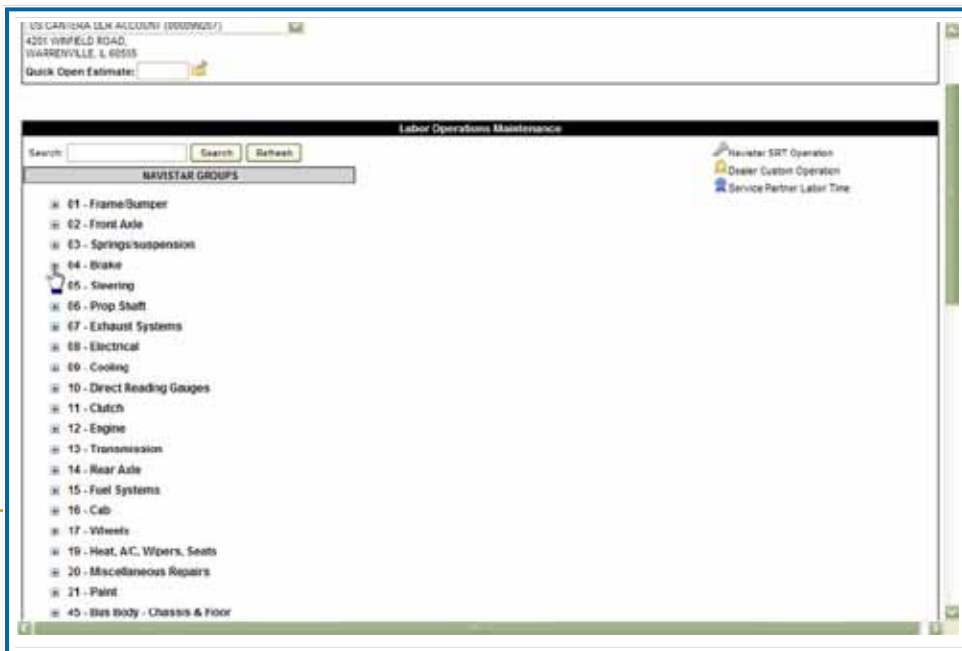
The dealership is offering a promotion, Front Wheel Pull – \$80 per axle. The related operations are to replace the brake shoes, brake drums and air chamber.

You can set up a custom operation by accessing the Operation Maintenance screen through the Dealer menu.

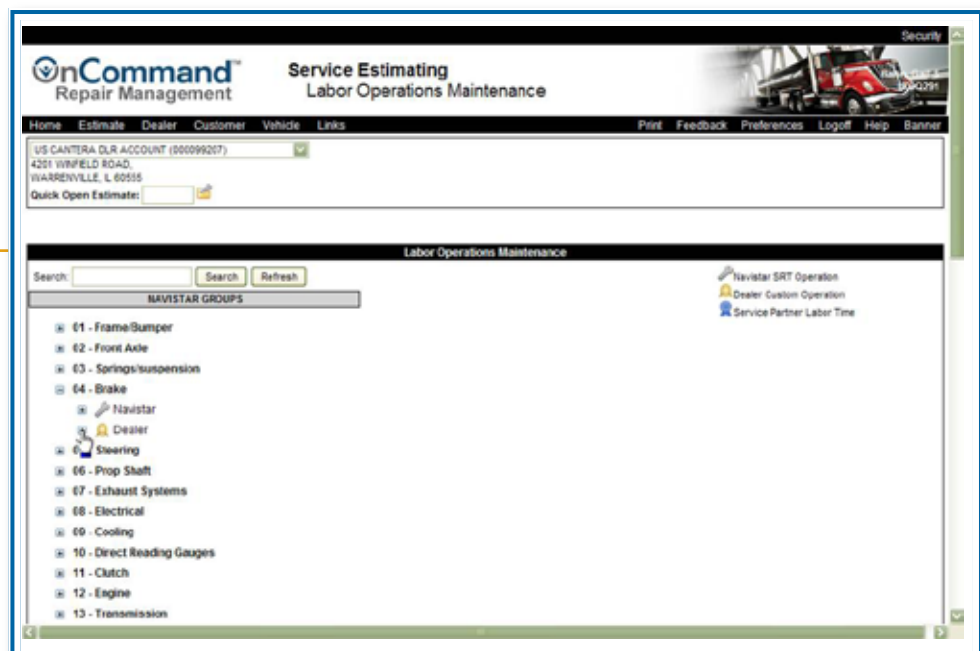


- Please hover over Dealer in the menu bar. Click on Operation Maintenance.

LESSON 4: ADDING AN OPERATION

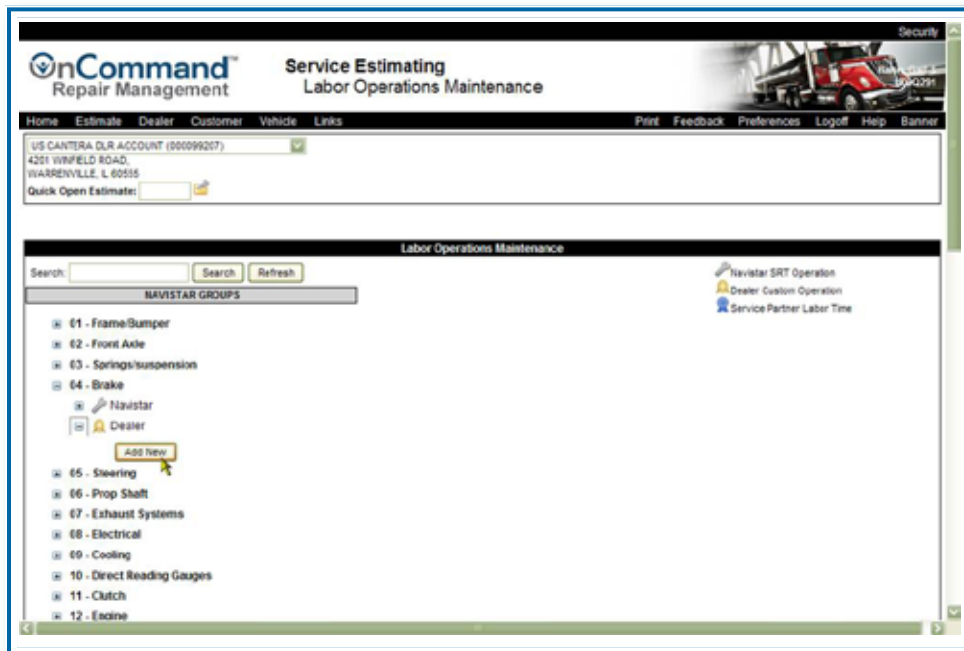


You will add the custom operation to the Brake category. To expand this category, click on the plus sign in front of it.



Now you can see an entry for the standard Navistar labor operations tree and one for the Dealer. To expand the Dealer operation tree, click the plus sign in front of it.

LESSON 4: ADDING AN OPERATION



To add an operation, click the Add New button.

LESSON 4: ADDING AN OPERATION

Now enter the information for this special promotion in the fields provided.

- Begin by clicking in the Operation Name field. Type in Front Axle Wheel Pull.
- This is a fixed price operation. Click the radio button after Fixed Operation Price.
- The price is \$80. Begin by clicking in the Operation Fixed Price field in the middle of the screen. Next type 80 in the field.

Click the Save button.

LESSON 4: ADDING AN OPERATION

To set the related operations for this custom operation, click the Set Related Operations button.

Here you see the collapsed operations tree. Begin by clicking the plus sign in front of Brake to expand it.

LESSON 4: ADDING AN OPERATION

OnCommand Repair Management Service Estimating Labor Operations Maintenance

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CANTRA INTERNAL AGCT(300096212)
4201 WINDFELD ROAD
WARRENVILLE, IL 60555
Quick Open Estimate: [button]

Select Related Operation for: **FRONT AXLE WHEEL PULL**

Search: [input] Search Refresh Return

SAVSTAR GROUPS

- 61 - Frame/Bumper
- 62 - Front Axle
- 63 - Springs/suspension
- 64 - Brake

Operation Name	Related Time	Apply Markup
☐ ABS CONTROLLER AND/OR RELAY VALVE ASSEMBLY, R & R AND/OR REPLACE		☐
☐ ABS ELECTRONIC CONTROL MODULE, REPLACE		☐
☐ ABS ELECTRONIC CONTROL UNIT (FULL POWER BRAKES), REPLACE		☐
☐ ABS ELECTRONIC CONTROL UNIT (STANDARD HYDRAULIC), REPLACE		☐
☐ ABS EXCITER RING, REPLACE		☐
☐ ABS HYDRAULIC COMPACT UNIT (HCU) - (FULL POWER BRAKES), REPLACE		☐
☐ ABS HYDRAULIC CONTROL UNIT (STANDARD HYDRAULIC), REPLACE		☐
☐ ABS MODULATOR VALVE, REPLACE		☐

A list of operations is displayed. In this case, the first operation you're looking for is AIR BRAKE CHAMBER, REPLACE. We'll scroll down to find it in the list.

LESSON 4: ADDING AN OPERATION

The screenshot shows the 'Labor Operations Maintenance' window. At the top, it says 'Select Related Operation for: Front Axle Wheel Pull'. Below this is a search bar with 'Search', 'Refresh', and 'Return' buttons. On the right, there are links for 'Navistar SRT Operation', 'Dealer Custom Operation', and 'Service Partner Labor Time'. A tree view on the left shows categories: 61 - Frame/Bumper, 62 - Front Axle, 63 - Springs/Suspension, and 64 - Brake. The '64 - Brake' category is expanded, showing a list of operations. The 'AIR BRAKE CHAMBER, REPLACE' operation is highlighted, and its checkbox is being clicked. The table has three columns: 'Operation Name', 'Related Time', and 'Apply Markup'.

Operation Name	Related Time	Apply Markup
☐ ABS CONTROLLER AND/OR RELAY VALVE ASSEMBLY, B.R. AND/OR REPLACE		☐
☐ ABS ELECTRONIC CONTROL MODULE, REPLACE		☐
☐ ABS ELECTRONIC CONTROL UNIT (FULL POWER BRAKES), REPLACE		☐
☐ ABS ELECTRONIC CONTROL UNIT (STANDARD HYDRAULIC), REPLACE		☐
☐ ABS EXCITE RING, REPLACE		☐
☐ ABS HYDRAULIC COMPACT UNIT (HCU) - FULL POWER BRAKES, REPLACE		☐
☐ ABS HYDRAULIC CONTROL UNIT (STANDARD HYDRAULIC), REPLACE		☐
☐ ABS MODULATOR VALVE, REPLACE		☐
☐ ABS QUICK RELEASE VALVE, REPLACE		☐
☐ ABS SYSTEM (HYDRAULIC) DIAGNOSTICS (ELECTRONIC)		☐
☐ ABS SYSTEM DIAGNOSTICS (ELECTRONIC)		☐
☐ ABS WHEEL SENSOR AND/OR RETAINER (HYDRAULIC), REPLACE		☐
☐ ABS WHEEL SENSOR AND/OR RETAINER, REPLACE		☐
☐ ACCUMULATOR (FULL POWER BRAKES), REPLACE		☐
☐ AIR BRAKE CHAMBER (WEDGE), REPLACE		☐
☐ AIR BRAKE CHAMBER DIAGNOSIS, REPLACE		☐
☒ AIR BRAKE CHAMBER, REPLACE		☐
☐ AIR BRAKE HOSE, REPLACE		☐

Click the checkbox in front of AIR BRAKE CHAMBER, REPLACE.

- Now you'll enter the related time for this operation. Begin by clicking in the Related Time text box. Type in the time for this operation – 0.5.
- The Apply Markup checkbox allows you to indicate whether or not the dealer's labor time markup is to be applied to this operation. Check this box if you want to apply the markup to the operation. In this case, you will not.

LESSON 4: ADDING AN OPERATION



Now you're looking for BRAKE DRUM FRONT, REPLACE and BRAKE SHOES AND/OR SHOE SPRINGS, REPLACE. We'll scroll down to find it in the list.

Click the checkbox in front of BRAKE DRUM FRONT, REPLACE.

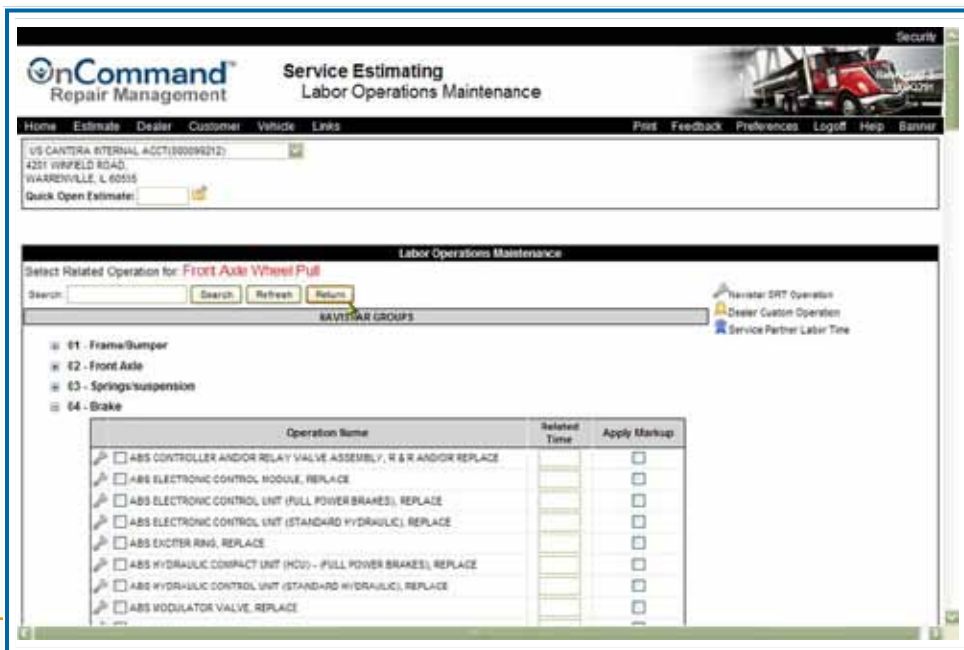
- Now you'll enter the related time for this operation. Begin by clicking in the Related Time text box. Type in the time for this operation – 0.0.
- Click the checkbox in front of BRAKE SHOES AND/OR SHOE SPRINGS, REPLACE.
- Now you'll enter the related time for this operation. Begin by clicking in the Related Time text box. Type in the time for this operation – 0.5.

To complete this operation, you must click the Related Selected Operation button, which is at the end of the list. We'll scroll down to find it.

LESSON 4: ADDING AN OPERATION



Click the Relate Selected Operation button. Finally, we must scroll back up to the top of the operations tree.



Click the Return button.

LESSON 4: ADDING AN OPERATION

OnCommand[™] Repair Management Service Estimating Add/Edit Operation

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CANTRA DLR ACCOUNT (800999207)
4251 WINFELD ROAD,
WARRENVILLE, IL 60555
Quick Open Estimate:

Operation Fixed Price

Add/Edit Operation

Component Group: On-Site

Operation Name: Front Axle Wheel Pul

Variable Time: ☐
Fixed Operation Price: ☒ Operation Fixed Price: 30
Fixed Parts/Labor Price: ☐ Tax Included: ☒
Fixed Labor Time: ☐

Operation URL:

Exclude Operation: ☐ If checked this operation will not be available for estimating

Standard Op Notes:

Save Cancel New Copy Operation Delete Set Related Operation

Current Variations/Assignments for Operation:

Variation/Assignment Name	Model Series	Model Family	Model	Engine	Labor Time	Labor Time Markup	Parts	Attachments	Action
DEFAULT	ALL SERIES	ALL FAMILIES	ALL MODELS	All Engines	0	0	30	View	

[View](#)

A table appears at the bottom of the screen. Click on the View link in the Parts column to add parts to this operation.

OnCommand[™] Repair Management Service Estimating View Parts For Operation/Assignment

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CANTRA DLR ACCOUNT (800999207)
4251 WINFELD ROAD,
WARRENVILLE, IL 60555
Quick Open Estimate:

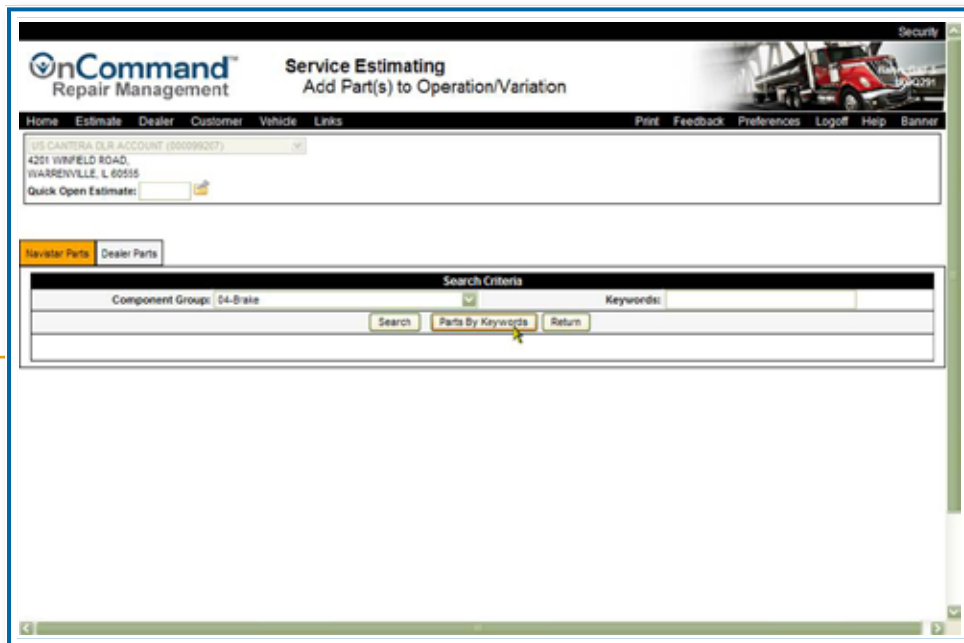
Operation Name: Wheel Pull - \$30 per axle / Assignment/Variation: DEFAULT

Add Part(s) Return

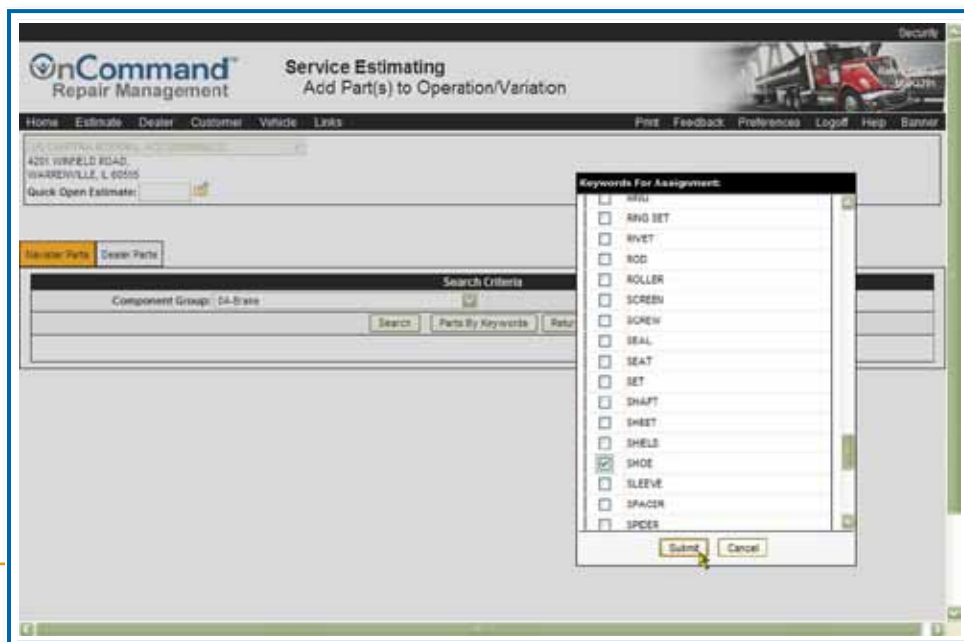
Copyright 2010 Navistar, Inc.

If there were any parts currently assigned to this operation, they would be listed here. Click on the Add Parts button.

LESSON 4: ADDING AN OPERATION



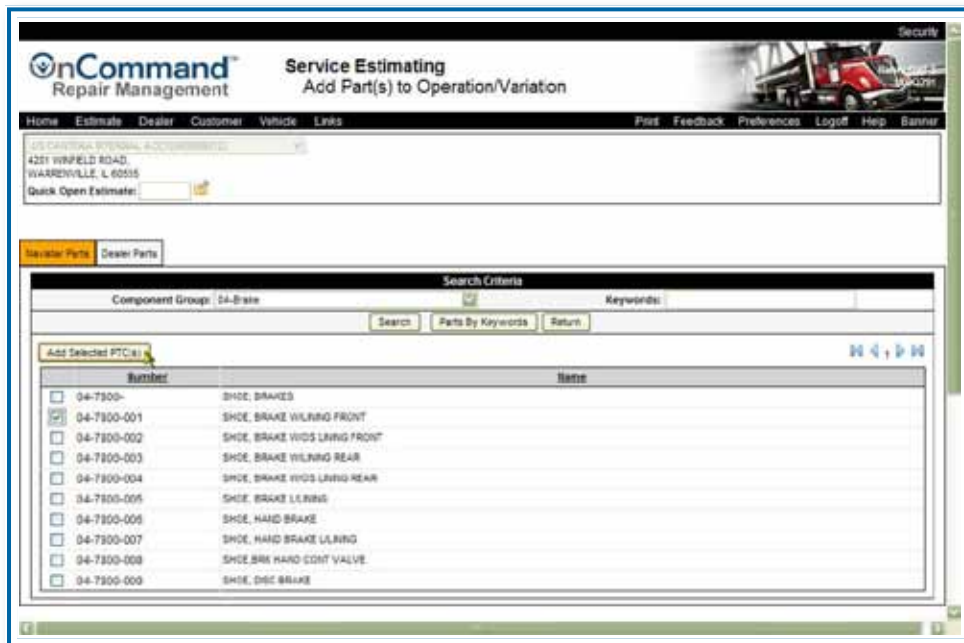
To narrow the search for the correct part, click the Parts By Keyword button.



This brings up the Keywords For Assignment window.

- Click in the checkbox in front of SHOE.
- Click the Submit button.

LESSON 4: ADDING AN OPERATION



A list of parts is displayed. Click the checkbox in front of SHOE, BRAKE W/LINING FRONT.

Click the Add Selected PTC(s) button.

LESSON 4: ADDING AN OPERATION

OnCommand Repair Management Service Estimating
Add Part(s) to Operation/Variation

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CANTERA INTERNAL ACCOUNT: 4201 WINFIELD ROAD, WARRENVILLE, IL 60555
Quick Open Estimate: [button]

PTCs added successfully.

Navigator Parts Dealer Parts

Component Group: 04-Brake Search Criteria Keywords: [input]
[Search] [Parts By Keywords] [Return]

Add Selected PTC(s)

Number	Name
☐ 04-7900-001	SHOE, BRAKES
☐ 04-7900-002	SHOE, BRAKE WILING FRONT
☐ 04-7900-003	SHOE, BRAKE WIDS LIVING FRONT
☐ 04-7900-004	SHOE, BRAKE WILING REAR
☐ 04-7900-005	SHOE, BRAKE WIDS LIVING REAR
☐ 04-7900-006	SHOE, BRAKE L LIVING
☐ 04-7900-007	SHOE, HAND BRAKE
☐ 04-7900-008	SHOE, HAND BRAKE L LIVING
☐ 04-7900-009	SHOE, HAND BRAKE CONT VALVE
☐ 04-7900-010	SHOE, DISC BRAKE

A message that the PTC(s) were added successfully is displayed. To return to the Operation screen, click the Return button.

OnCommand Repair Management Service Estimating
View Parts For Operation/Assignment

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CANTERA INTERNAL ACCOUNT: 4201 WINFIELD ROAD, WARRENVILLE, IL 60555
Quick Open Estimate: [button]

Operation Name: FrontAxle Wheel Pull / Assignment/Variation: DEFAULT

Parts	Part Cd Part Type Cd	Name	Qty	Edit	Action
	04-7900-001	SHOE, BRAKE WILING FRONT			Delete

[Add Part(s)] [Return]

The selected part is now displayed. Click the Return button.

LESSON 4: ADDING AN OPERATION

OnCommand[™] Repair Management Service Estimating Add/Edit Operation

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CARTRAIL INTERNATIONAL, INC.
4251 WINFELD ROAD,
WARRENVILLE, IL 60555
Quick Open Estimate:

Add/Edit Operation

Component Group: On-Drive

Operation Name: Front Axle Wheel Pul

Variable Time: ☐
Fixed Operation Price: ☒
Fixed Parts/Labor Price: ☐
Fixed Labor Time: ☐

Operation Fixed Price: 30
Tax Included: ☒

Operation URL:
Exclude Operation: ☐ If checked this operation will not be available for estimating

Standard Op Notes:

Current Variations/Assignments for Operation:

Variation/Assignment Name	Model Series	Model Family	Model	Engine	Labor Time	Labor Time Markup	Parts	Attachments	Action
DEFAULT	ALL SERIES	ALL FAMILIES	ALL MODELS	All Engines	8	38	View	View	

[New Assignment/Variation](#)

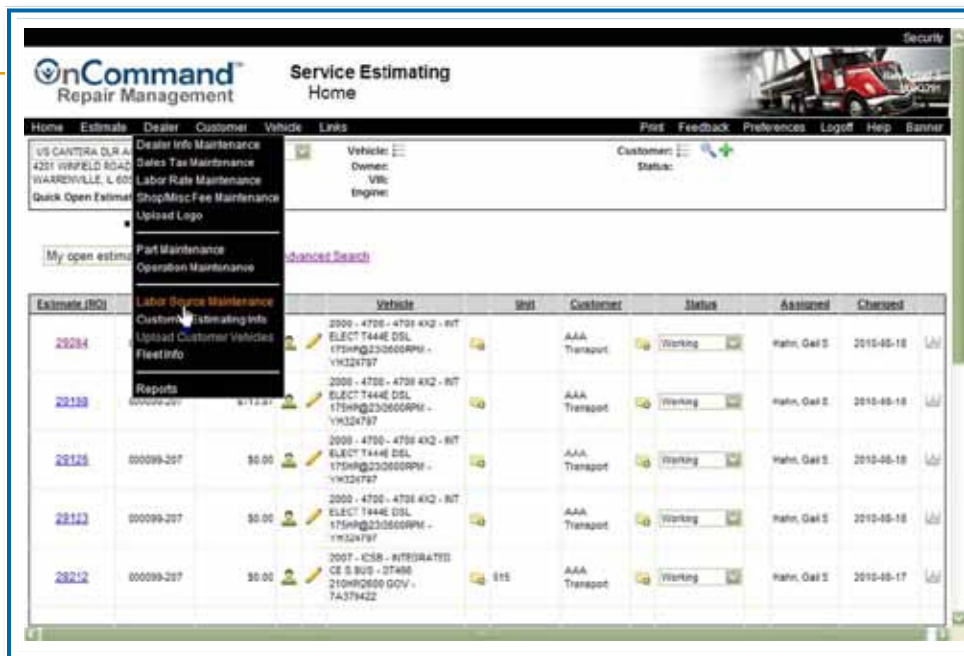
Now you're back at the Add/Edit Operation screen.

[illegible]

LESSON 5: ADDING A LABOR SOURCE

- In the following simulation, you'll practice adding a labor source. The dealership is establishing a special labor rate for a customer.

You can set up a labor rate by accessing the Labor Source Maintenance screen from the Dealer menu.



Please hover over Dealer in the menu bar.
Click on Labor Source Maintenance.

LESSON 5: ADDING A LABOR SOURCE

Type	Name	Description	Labor Rate	Edit	Delete
	Wellman Cartage		0.00		
Fleet / Service Partner	__ALLEGBLDG__LABOR_RATE	Alled Building Products and Substances Fleet Pricing Source	75.00		Delete
Fleet / Service Partner	__BERNER__LABOR_RATE	Gerage Milabetschouan Fleet Pricing Source	80.00		Delete
Fleet / Service Partner	__BLSTRICK__LABOR_RATE	BLS Trucking Fleet Pricing Source	0.00		Delete
Fleet / Service Partner	__BLUEBELL__LABOR_RATE	Blue Bell Greeneries Fleet Pricing Source	0.00		Delete
Fleet / Service Partner	__BOUTH__LABOR_RATE	Bouler express Fleet Pricing Source	0.00		Delete
Fleet / Service Partner	__BRINKSCANADA__LABOR_RATE	Brink Canada Fleet Pricing Source	0.00		Delete
Fleet / Service Partner	__BUDGET__LABOR_RATE	Budget Truck Rental Fleet Pricing Source	0.00		Delete
Fleet / Service Partner	__CALARK__LABOR_RATE	Cal Ark Fleet Pricing Source	0.00		Delete
Fleet / Service Partner	__CARDINAL__LABOR_RATE	Cardinal Logistics Management Corporation Fleet Pricing Source	0.00		Delete
Fleet / Service Partner	__CHEESEMAN__LABOR_RATE	Cheeseman LLC Fleet Pricing Source	0.00		Delete
Fleet / Service Partner	__DUNBAR__LABOR_RATE	Dunbar Ammonet Fleet Pricing Source	0.00		Delete
Fleet / Service Partner	__DURDOCHER__LABOR_RATE	Durdocher International Fleet Pricing Source	0.00		Delete
Fleet / Service Partner	__ENTERPRISE__LABOR_RATE	Enterprise Fleet Pricing Source	75.00		Delete
Fleet / Service Partner	__ENTERPRISETRANS__LABOR_RATE	Enterprise Transportation Fleet Pricing Source	0.00		Delete

To add a labor source, fill in each of the three blank text boxes at the top of the table: Name, Description and Labor Rate.

- Begin by clicking in the Name field. Type in the customer name, Wellman Cartage.

LESSON 5: ADDING A LABOR SOURCE

Type	Name	Description	Labor Rate	Edit	Delete
Fleet / Service Partner	Wetman Carriage	Special Fleet Rate	70.00		
Fleet / Service Partner	ALLEGEDD_LABOR_RATE	Alleg Building Products and Substances Fleet Pricing Source	75.00		Delete
Fleet / Service Partner	BERNER_LABOR_RATE	Garage Malabetschuan Fleet Pricing Source	80.00		Delete
Fleet / Service Partner	BLSTRICK_LABOR_RATE	BLS Trucking Fleet Pricing Source	0.00		Delete
Fleet / Service Partner	BLUEBELL_LABOR_RATE	Blue Bell Creameries Fleet Pricing Source	0.00		Delete
Fleet / Service Partner	BOUTN_LABOR_RATE	Boulin express Fleet Pricing Source	0.00		Delete
Fleet / Service Partner	BRINKSCANADA_LABOR_RATE	Brink Canada Fleet Pricing Source	0.00		Delete
Fleet / Service Partner	BUDGET_LABOR_RATE	Budget Truck Rental Fleet Pricing Source	0.00		Delete
Fleet / Service Partner	CALARK_LABOR_RATE	Cal Ark Fleet Pricing Source	0.00		Delete
Fleet / Service Partner	CARDINAL_LABOR_RATE	Cardinal Logistics Management Corporation Fleet Pricing Source	0.00		Delete
Fleet / Service Partner	CHEESMAN_LABOR_RATE	Cheesman LLC Fleet Pricing Source	0.00		Delete
Fleet / Service Partner	DUNBAR_LABOR_RATE	Dunbar Amorel Fleet Pricing Source	0.00		Delete
Fleet / Service Partner	DUROCHER_LABOR_RATE	Durocher International Fleet Pricing Source	0.00		Delete
Fleet / Service Partner	ENTERPRISE_LABOR_RATE	Enterprise Fleet Pricing Source	75.00		Delete
Fleet / Service Partner	ENTERPRISETRANS_LABOR_RATE	Enterprise Transportation Fleet Pricing Source	0.00		Delete

- Next click in the Description field.
Type in the description – Special Fleet Rate.
- Next click in the Labor Rate field.
Type the Labor Rate – 70.00.

To add the labor source, click the green plus sign at the end of the row.

LESSON 5: ADDING A LABOR SOURCE

OnCommand[™] Repair Management Service Estimating Labor Source Maintenance

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CANTRA DLR ACCOUNT (000099207)
4201 WILFELD ROAD
WARRENVILLE, IL 60555

Quick Open Estimate:

• The new record was created

Type	Name	Description	Labor Rate	Edit	Delete
Fleet / Service Partner	__ALLEBOLD__LABOR_RATE	Alled Building Products and Substances Fleet Pricing Source	75.00		
Fleet / Service Partner	__BERNER__LABOR_RATE	Garage Milabetschouk Fleet Pricing Source	80.00		
Fleet / Service Partner	__BLSTRICK__LABOR_RATE	BLS Trucking Fleet Pricing Source	0.00		
Fleet / Service Partner	__BLUEBELL__LABOR_RATE	Blue Bell Greenerys Fleet Pricing Source	0.00		
Fleet / Service Partner	__BOUTH__LABOR_RATE	Bouler express Fleet Pricing Source	0.00		
Fleet / Service Partner	__BRINKSCANADA__LABOR_RATE	Brink Canada Fleet Pricing Source	0.00		
Fleet / Service Partner	__BUDGET__LABOR_RATE	Budget Truck Rental Fleet Pricing Source	0.00		
Fleet / Service Partner	__CALARK__LABOR_RATE	Cal Ark Fleet Pricing Source	0.00		
Fleet / Service Partner	__CARDINAL__LABOR_RATE	Cardinal Logistics Management Corporation Fleet Pricing Source	0.00		
Fleet / Service Partner	__CHEESMAN__LABOR_RATE	Cheesman LLC Fleet Pricing Source	0.00		
Fleet / Service Partner	__DUNBAR__LABOR_RATE	Dunbar Ammored Fleet Pricing Source	0.00		
Fleet / Service Partner	__DURDOCHER__LABOR_RATE	Durdocher International Fleet Pricing Source	0.00		
Fleet / Service Partner	__ENTERPRISE__LABOR_RATE	Enterprise Fleet Pricing Source	75.00		
Fleet / Service Partner	__ENTERPRISETRANS__LABOR_RATE	Enterprise Transportation Fleet Pricing Source	0.00		

To see the record you've just added, click the Last Page icon in the page navigation controls.

OnCommand[™] Repair Management Service Estimating Labor Source Maintenance

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CANTRA DLR ACCOUNT (000099207)
4201 WILFELD ROAD
WARRENVILLE, IL 60555

Quick Open Estimate:

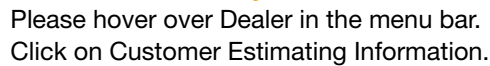
Type	Name	Description	Labor Rate	Edit	Delete
Fleet / Service Partner	__TRUCKWAY__LABOR_RATE	Interstate Truckway Inc. DBA Truckway Leasing Fleet Pricing Source	0.00		
Fleet / Service Partner	__VATransport__LABOR_RATE	V.A. Transport Fleet Pricing Source	30.00		
Fleet / Service Partner	__HCE__LABOR_RATE	HourEnergy Fleet Pricing Source	0.00		
Fleet / Service Partner	__GATEGRATES__LABOR_RATE	G&G Integrated Fleet Pricing Source	0.00		
Fleet / Service Partner	__NAVISTAR_TEST_FLEET	Navistar Test Fleet Fleet Pricing Source	0.00		
Dealer	Internal Labor Rate	Labor rate for sales	60.00		
Dealer	Kim Rogers Test labor Rate	Kim test labor rate	50.00		
Dealer	Mathews Trucking	Special pricing	50.00		
Dealer	Steve's special labor rate	Use only on Steve's Cartage	55.00		
Dealer	Test labor source for Admin Training	Admin Training	30.00		
Dealer	Testing labor source	Test only	40.00		
Dealer	Trailer Labor Rate	Trailer labor rate	35.00		
Dealer	Wellman Cartage	Special Fleet Rate	70.00		

Here is the record for Wellman Cartage that you added.

NOTES

This image shows a full page of blank, lined paper. It features approximately 28 horizontal black lines spaced evenly across the page, typical of standard notebook paper. The lines are thin and extend from the left edge to the right edge. There are no margins, text, or other markings on the page.

In the following simulation, you are working from a printout from the Dealer Management System and want to update the customer estimating information for a number of customers at once. You can access the Mass-edit items in a grid feature from the Customer Estimating Info screen.



LESSON 6: MASS-EDITING CUSTOMER ESTIMATING INFORMATION

The screenshot displays the 'OnCommand Repair Management' interface for 'Service Estimating Customer Estimating Information'. The top navigation bar includes links for Home, Estimate, Dealer, Customer, Vehicle, Links, Print, Feedback, Preferences, Logout, Help, and Banner. Below the navigation bar, there is a search bar with the text 'US CANTERA DLR ACCOUNT (000000017)' and a 'Quick Open Estimate' button. The main form area is titled 'Customer Estimating Information' and contains the following fields:

- Name: [Text Field]
- Address: [Text Field]
- DNS: [Text Field]
- Labor Pricing Source: [Dropdown Menu]
- Part Pricing Source: [Dropdown Menu]
- Customer Fleet Charge: [Text Field]
- Tax exempt: [Checkbox]

On the right side of the form, there is a link labeled 'Mass-edit items in a grid' with a mouse cursor icon pointing to it. At the bottom of the form, there are 'Save' and 'Reset' buttons.

To access the estimating information for more than one customer at a time, click the Mass-edit items in a grid link.

LESSON 6: MASS-EDITING CUSTOMER ESTIMATING INFORMATION

The screenshot displays the 'OnCommand Repair Management' interface for 'Service Estimating Customer Estimating Information'. The top navigation bar includes links for Home, Estimate, Dealer, Customer, Vehicle, Links, Print, Feedback, Preferences, Logout, Help, and Banner. Below the navigation bar, there is a section for 'US CANTELA DLR ACCOUNT (000099207)' with a 'Quick Open Estimate' button. The main section is titled 'Search Criteria' and contains several input fields: 'Name' (with a yellow arrow pointing to it), 'DMS', 'Labor Pricing', 'Part Pricing', 'Customer Fleet Charge', and 'Tax exempt'. There are also checkboxes for 'Show deleted customers' and 'Status'. At the bottom of the search criteria section are 'Search' and 'Reset' buttons.

• You'll start editing at the beginning of the alphabet.

- Begin by clicking in the Name text box. Type A. Click the Search button.

LESSON 6: MASS-EDITING CUSTOMER ESTIMATING INFORMATION

OnCommand[™] Repair Management Service Estimating Customer Estimating Information

Home Estimate Dealer Customer Vehicle Links Post Feedback Preferences Logout Help Settings

US CANTERA DLR ACCOUNT (000099237) 4301 WINDFIELD ROAD, WARRENVILLE, IL 60555 Customer Status:

Quick Open Estimator

■ Update completed

Search Criteria

Name: A DMS: Labor Pricing: Part Pricing: Customer Fleet Charge (Y/N): Tax exempt: ☐

Show deleted customers: ☐ Search Reset

Customer	DMS	Customer Fleet Charges	Part Pricing	Labor Pricing	Rate	Exempt	Edit	Deleted
A and K Trucking Incorporated			Retail		0.00	N		N
A. BEAUMONT TRANSPORT INC.			Retail		0.00	N		N
AAA Transport	98348		Retail	Internal Labor Rate (60.00)	60.00	Y		N
AB Inbev Auto			Retail		0.00	N		N
ABROTT FORDS INC			Retail		0.00	N		N
abrott Ford Services			Retail		0.00	N		N
ABC Co			Retail	Steve's special labor rate	50.00	Y		N
ABC Co			Retail		0.00	N		N

● All the customers whose names start with A are displayed.

- To edit the estimating information for AAA Transport, click on the Pencil icon at the end of the row.

LESSON 6: MASS-EDITING CUSTOMER ESTIMATING INFORMATION

OnCommand[™] Repair Management Service Estimating Customer Estimating Information

Home Estimate Dealer Customer Vehicle Links Post Feedback Preferences Logout Help Settings

US CANTEIRA DLR ACCOUNT (000099237) 4301 WINDFIELD ROAD, WARRENVILLE, IL 60555

Quick Open Estimator

Customer Status

Search Criteria

Name: a DMS: Customer Fleet Charge (Y/N): Labor Pricing: Part Pricing: Tax exempt: ☐

Show deleted customers: ☐ Search Reset

Customer	DMS	Customer Fleet Charge	Part Pricing	Labor Pricing	Rate	Exempt	Edit	Deleted
A and K Trucking Incorporated			Retail		0.00	N		N
A. BEAUMONT TRANSPORT INC.			Retail		0.00	N		N
ABC Transport	56345		Retail	Internal Labor Rate	60.00	☒		N
ABC Trucking			Retail		0.00	N		N
ABCOT FOODS INC			Major Fleet		0.00	N		N
ABCOT Food Services			National Fleet		0.00	N		N
ABC Co			Dealer fleet		0.00	N		N
ABC Co			Retail	Steve's special labor rate	50.00	Y		N
ABC Co			Retail		0.00	N		N
ABC Trucking			Retail		0.00	N		N

We want to direct parts pricing to reflect the fleet's correct price. To do this, locate the Parts Pricing field and click on the drop-down arrow. Then click Fleet Charge.

LESSON 6: MASS-EDITING CUSTOMER ESTIMATING INFORMATION

OnCommand[™] Repair Management Service Estimating Customer Estimating Information

Home Estimate Dealer Customer Vehicle Links Post Feedback Preferences Logout Help Banner

US CANTEIRA DLR ACCOUNT (000099237)
4201 WINFIELD ROAD,
WARRENVILLE, IL 60555
Quick Open Estimate

Customer: Status:

Search Criteria
Name: a DMS: Customer Fleet Charge (Y/N):
Labor Pricing: Part Pricing: Tax exempt: ☐
Show deleted customers: ☐
Search Reset

Customer	DMS	Customer Fleet Charge	Part Pricing	Labor Pricing	Rate	Exempt	Edit	Deleted
A and K Trucking Incorporated			Retail		0.00	N		N
A. BEAUMONT TRANSPORT INC.			Retail		0.00	N		N
AAA Transport	58345		Fleet charge	Internal Labor Rate	60.00	☒		N
AB Invel Auto			Retail		0.00	N		N
ABROT FOODS INC			Retail		0.00	N		N
Abbot Food Services			Retail		0.00	N		N
ABC Co			Retail	Steve's special labor rate	50.00	Y		N
ABC Co			Retail		0.00	N		N
Abc Trucking			Retail		0.00	N		N

When all field values have been updated, you can save the changes by clicking the green checkmark at the end of the row.

OnCommand[™] Repair Management Service Estimating Customer Estimating Information

Home Estimate Dealer Customer Vehicle Links Post Feedback Preferences Logout Help Banner

US CANTEIRA DLR ACCOUNT (000099237)
4201 WINFIELD ROAD,
WARRENVILLE, IL 60555
Quick Open Estimate

Customer: Status:

Update completed

Search Criteria
Name: a DMS: Customer Fleet Charge (Y/N):
Labor Pricing: Part Pricing: Tax exempt: ☐
Show deleted customers: ☐
Search Reset

Customer	DMS	Customer Fleet Charge	Part Pricing	Labor Pricing	Rate	Exempt	Edit	Deleted
A and K Trucking Incorporated			Retail		0.00	N		N
A. BEAUMONT TRANSPORT INC.			Retail		0.00	N		N
AAA Transport	58345		Fleet charge	Internal Labor Rate (60.00)	60.00	Y		N
AB Invel Auto			Retail		0.00	N		N
ABROT FOODS INC			Retail		0.00	N		N
Abbot Food Services			Retail		0.00	N		N
ABC Co			Retail	Steve's special labor rate	50.00	Y		N
ABC Co			Retail		0.00	N		N

The updated estimating information for this customer is displayed.

[illegible]

LESSON 7: RUNNING A REPORT

- Now you'll run one of the available dealership reports.

The Operations Quoted Not Sold Report allows you to view the estimate items quoted in estimates but not sold. It defaults to a time range for the last month. You'd like to see all operations from the beginning of the quarter to date.



Please hover over Dealer in the menu bar. Open the Reports sub-menu by hovering over Reports. Click on Operations Quoted Not Sold.

LESSON 7: RUNNING A REPORT

OnCommand[™] Repair Management

Service Estimating
Operations Not Sold Report

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CANTERA DLR ACCOUNT (000099207)
4301 WINFIELD ROAD,
WARRENVILLE, IL 60555

Quick Open Estimate:

Operations Quoted Not Sold

From Date: 8/2/2010 To Date: 9/1/2010

Quoted For Dealerships: A3

Quoted By Users: A3

View Report

To change the date range to the beginning of the quarter to today, begin by clicking on the Calendar icon after From Date.

OnCommand[™] Repair Management

Service Estimating
Operations Not Sold Report

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CANTERA DLR ACCOUNT (000099207)
4301 WINFIELD ROAD,
WARRENVILLE, IL 60555

Quick Open Estimate:

Operations Quoted Not Sold

From Date: 8/2/2010 To Date: 9/1/2010

Quoted For Dealerships: A3

Quoted By Users: A3

View Report

Calendar: July 2010

Today: September 1, 2010

The calendar displays the previous month. To change it to back one more month, click the back arrow in the upper left corner of the calendar. Click on 1.

LESSON 7: RUNNING A REPORT

The screenshot shows the nCommand Repair Management interface for the 'Service Estimating Operations Not Sold Report'. The 'Quoted For Dealership' dropdown is set to 'AI'. The 'Quoted By User' dropdown is set to 'US CANTERA DLR ACCOUNT (000099207)'. The 'View Report' button is highlighted.

To limit your report to the US Cantera dealership, begin by clicking the down arrow after Quoted For Dealership. Then select US CANTERA DLR ACCOUNT from the drop-down list.

The screenshot shows the nCommand Repair Management interface for the 'Service Estimating Operations Not Sold Report'. The 'Quoted For Dealership' dropdown is set to 'US CANTERA DLR ACCOUNT (000099207)'. The 'View Report' button is highlighted.

Click the View Report button.

LESSON 7: RUNNING A REPORT

nCommand Repair Management Service Estimating Operations Not Sold Report

Home Estimate Dealer Customer Vehicle Links Post Feedback Preferences Logout Help Banner

US CANTERA SLR ACCOUNT (000099007)
4201 WINFIELD ROAD
WARRENVILLE, IL 60558
Quick Open Estimate:

Operations Quoted Not Sold

From Date: 7/1/2010 To Date: 9/1/2010
Quoted For Dealership: US CANTERA SLR ACCOUNT (000099007)
Quoted By User: All

[View Report](#)

Operation	Variation	Date Quoted	Customer Name	Dealer	User Name
ENGINE OIL TIGHT, CRACKS/LEAKS AND REPAIR		7/20/2010	Enterprise / TS Chicago	000099007	Brian Vukobratovic
RADIATOR ASSEMBLY REPLACE		7/19/2010	Budget Truck Rental / Tulsa	000099007	Richard Hansen

[Export To Excel](#)

- Here you can see the operations that were quoted but not sold during this time period.

NOTES

[illegible]

LESSON 8: ADDING A NEW CUSTOMER

- In the following simulation, you'll practice adding a new customer.

You'll use the Express Customer Add feature to input the customer's information.



- To add a new customer, click the green plus sign after Customer in the Estimate header.

LESSON 8: ADDING A NEW CUSTOMER

Fields highlighted in yellow are required whenever a new customer is added to the system. Now you must enter information for this customer in all required fields.

- Begin by clicking in the Business Name field. Type in the customer's name, Peridot Trucking.
- This is a service customer. Click the checkbox for Service.
- Now enter the customer's address. Begin by clicking in the Address Line 1 field. Type in 621 S. Addison Rd.
- Now enter the customer's postal code. Begin by clicking in the Postal Code field. Type in 60101.
- Now enter the customer's phone number. Begin by clicking in the Phone field. The Phone field is set up to advance automatically from area code to exchange to number. Just type in 6306546543.
- Now enter the contact's first name. Begin by clicking in the Contact First Name field. Type in Joe.
- Next enter the contact's last name. Begin by clicking in the Contact Last Name field. Type in Burns.
- Now enter the contact's phone number. Begin by clicking in the Contact Phone field. Type in 6306546555.

When all fields are complete, click the Save button.

LESSON 8: ADDING A NEW CUSTOMER

The screenshot shows a web browser window titled "Postal Verification -- Webpage Dialog". The address bar displays the URL: https://evaluate.internationaldelivers.com/sales/AddressVerify/Verify.aspx?ISO_CTRY_NO=840&ADDR_CMPNY_NME=Long. The dialog is divided into two main sections: "Original Address" and "Verified Postal Address".

Original Address	Verified Postal Address
Company Name: Peridot Trucking	Peridot Trucking
Country: UNITED STATES	621 S. Addison Rd.
Address Line 1: 621 S. Addison Rd.	Addison, IL 60101-2856
Address Line 2:	
City: Addison	
State Or Province: ILLINOIS	
Postal Code: 60101	

Below the "Original Address" section is a "Verify" button. Below the "Verified Postal Address" section is a message: "The postal address was verified". At the bottom right of the dialog are "Accept" and "Close" buttons.

When you click the Save button, the system will automatically verify the address.

- Click the Accept button to accept this address.

LESSON 8: ADDING A NEW CUSTOMER

CustomerConnect - Express Customer Add - Webpage Dialog

https://value.internationaldelivers.com/sales/direct/DC/Main/ExpressCustomerAdd.aspx?DealerAccount=000099&DealerLocation=107&lang=CustomerEn

EXPRESS CUSTOMER ADD

Business and Contact Information

Dealer Account: CANTERA US OUR TEST ACCT (000099) [v]
 Dealer Location: IL WARRICKVILLE (237) [v]
 Business Name: Peridot Trucking
 Standardized Name: ☐ Peridot Trucking (recommended)
 Dept: ☐ Sales (SLS) ☒ Service (SVC) ☐ Parts (PKT)
 Alias: [v]
 TEM: ☐ Yes ☒ No
 Primary Vocations: -- Select -- [v]
 Carrier Type: -- Select -- [v]
 Country: UNITED STATES [v]
 Address Line 1: 621 S. Addison Rd.
 Address Line 2: [v]
 Postal Code: 60101 - 4918 [v]
 City: Addison
 State: ILLINOIS [v] Verify Address
 Phone: ☒ USA/Canada 630 - 555 - 5855
 Contact First Name: Joe
 Contact Last Name: Butts
 Contact Phone: ☒ USA/Canada 630 - 555 - 5858
 Email: [v]

FLEET INFORMATION (You must complete information for at least one vehicle center)

Vehicle Center	Predominant Make	#Fleet Units	#International Units
☐ Medium	-- Select -- [v]	[v]	[v]
☐ Heavy	-- Select -- [v]	[v]	[v]
☐ Severe	-- Select -- [v]	[v]	[v]
☐ Bus	-- Select -- [v]	[v]	[v]

You are currently not authorized to assign customer numbers.
 No matching customers found. Press the Next button to continue...

Assign Cust. Num. Next Close Help

https://value.internationaldelivers.com/sales/direct/DC/Main/ExpressCustomerAdd.aspx?DealerAccount=000099&DealerLocation=107&lang=CustomerEn

• The system automatically checks for existing customers with the same information to prevent the addition of duplicates. To finish adding this customer, click the Next button.

LESSON 8: ADDING A NEW CUSTOMER

The screenshot displays the nCommand Service Estimating Home interface. The top navigation bar includes links for Home, Estimate, Dealer, Customer, Vehicle, Links, Post, Feedback, Preferences, Logout, Help, and Banner. The main content area is divided into two sections. The left section contains a form for vehicle information, including a dropdown for 'Vehicle' (currently showing 'US CATERA DLR ACCOUNT (000000000)'), a text input for 'Owner' (showing '4211 WINTERFIELD ROAD, WARRENVILLE, IL 60089'), and a 'Quick Open Estimate' button. The right section contains a form for customer information, including a dropdown for 'Customer' (showing 'PenderTrucking (Addison, IL)'), a text input for 'State' (showing 'Dealer Customer'), and a 'Save' button. Below these forms, there is a link to 'My open estimates from past 2 days' and an 'Advanced Search' button. At the bottom of the page, there is a copyright notice: 'Copyright 2010 Navistar, Inc. All times are (GMT-05:00) Central Time (US & Canada)'.

• The new customer's information now populates the Estimate header.

NOTES

[illegible]

LESSON 9: ADDING A NEW CONTACT

As you saw in the previous simulation, a contact name and phone number is required when adding a new customer. You can also add additional contacts.

Contacts can be managed on the Customer Overview screen, which you can access once you've selected the customer. In this simulation, you'll add a new service contact for S and P Cartage.



To select the customer, S and P Cartage, click on the Customer List icon.

LESSON 9: ADDING A NEW CONTACT

Begin by clicking in the Search text box. Type the first letter of the customer name, S. Click the Search button.

Name	Company	Deleted
S and P Cartage	S and P Cartage	N
S&K Transport	S&K Transport	N
S&W Transport	S&W Transport	N
Safeway	Safeway	N
Sales Program Unit	International Trucks	N
Savill Aralia School Bus	Savill Aralia School Bus	N
Scully	Scully	N
Scully Transportation	Scully Transportation	N
Servicio Nacional Integrado de Administracion Tributaria	Servicio Nacional Integrado de Administracion Tributaria	N
Servicio Nacional Integrado de Administracion Tributaria	Servicio Nacional Integrado de Administracion Tributaria	N

Select S and P Cartage from the list by clicking on the Name link.

LESSON 9: ADDING A NEW CONTACT



Click the Customer Overview icon in the Estimate header.

The Dealer Customer Overview opens. In the right column of the Contacts tab are three buttons: Add, Update and Delete. Click on the Add button.

LESSON 9: ADDING A NEW CONTACT

Now complete the required fields.

- The new contact is in the Service Department. Click the checkbox in front of Service.
- Now enter the remaining contact information. Begin by clicking in the First Name field.
- Type in the contact's first name, Ron.
- Move to the Last Name field by clicking in it. Type in the contact's last name, Dell.
- Move to the Phone field by clicking in it. Type in the contact's phone number. Remember, the Phone field auto-advances. Just type in 6306549898
- Although it's not required, you should always try to get the contact's email address. Click in the Email field. Type in the contact's email address, Ron.Dell@S-PCartage.com

All fields are now complete; click the Save button.

LESSON 9: ADDING A NEW CONTACT

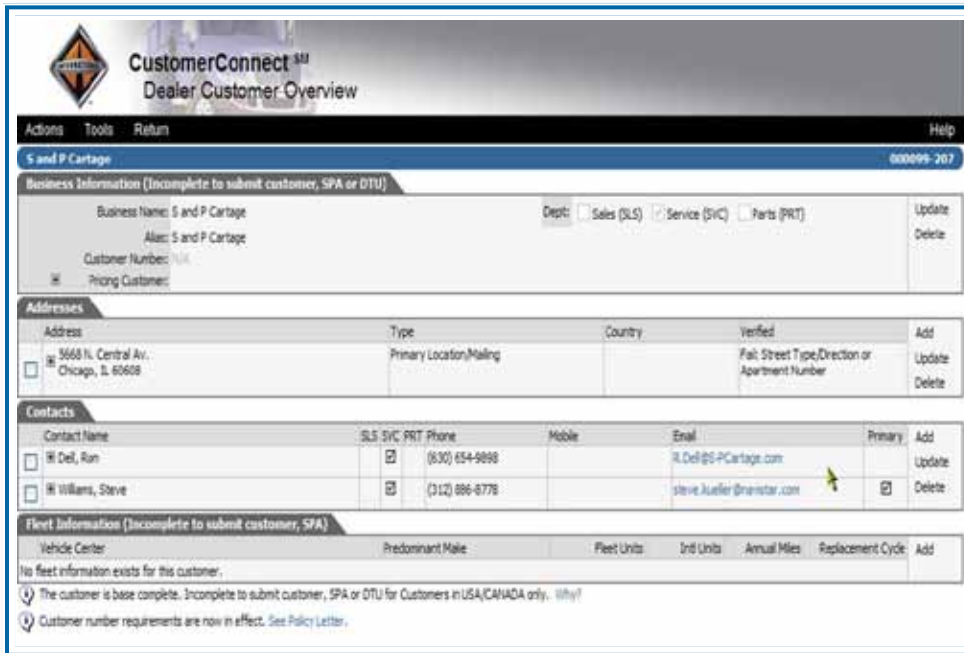
The screenshot shows a web-based form titled "S and P Cartage" with a header ID "000099-207". The form is used to add a new contact. At the top, there is a "Select Contact:" dropdown menu with "Dell, Ron" selected and an "Add" button. Below this, the form fields are organized into sections:

- Dept:** Radio buttons for Sales (SLS), Service (SVC) (checked), and Parts (PRT).
- Salutation:** A dropdown menu with "-- Select --" selected.
- First Name:** A text field containing "Ron".
- Middle Name:** An empty text field.
- Last Name:** A text field containing "Dell".
- Suffix:** A dropdown menu with "-- Select --" selected.
- Business Title:** A dropdown menu with "-- Select --" selected.
- Purchase Role:** A dropdown menu with "-- Select --" selected.
- Phone:** A section with a checked "USA/Canada" checkbox and three input fields containing "630", "654", and "9898".
- Fax:** A section with a checked "USA/Canada" checkbox and three empty input fields.
- Mobile:** A section with a checked "USA/Canada" checkbox and three empty input fields.
- Pager:** A section with a checked "USA/Canada" checkbox, three empty input fields, and a "Pin:" label followed by an empty input field.
- Email:** A text field containing "R.Dell@S-PCartage.com".
- Primary Contact(S):** Three checkboxes: "Primary Sales Contact" (unchecked), "Primary Service Contact" (unchecked), and "Primary Parts Contact" (unchecked).

 At the bottom of the form are four buttons: "Save", "Delete", "Close", and "Help". A yellow mouse cursor is pointing at the "Close" button. Below the form, a message states: "The contact **Ron Dell** is saved."

- A message appears at the bottom that the contact is saved. Click the Close button.

LESSON 9: ADDING A NEW CONTACT



CustomerConnectSM
Dealer Customer Overview

Actions Tools Return Help

S and P Cartage 000099-207

Business Information (Incomplete to submit customer, SPA or DTU)

Business Name: S and P Cartage Dept: ☐ Sales (SLS) ☒ Service (SVC) ☐ Parts (PRT) Update
 Alias: S and P Cartage Delete
 Customer Number: 1111
☒ Primary Customer

Addresses

Address	Type	Country	Verified	Add
☐ 5668 N. Central Ave. Chicago, IL 60608	Primary Location/Mailing		Full Street Type/Direction or Apartment Number	Update Delete

Contacts

Contact Name	SLS SVC PRT	Phone	Mobile	Email	Primary	Add
☐ R Del, Ron	☒	(630) 654-9898		R.Del@S-PCartage.com		Update
☐ Williams, Steve	☒	(312) 886-6778		steve.jueler@navistar.com	☒	Delete

Fleet Information (Incomplete to submit customer, SPA)

Vehicle Center	Predominant Make	Fleet Units	Int'l Units	Annual Miles	Replacement Cycle	Add
No fleet information exists for this customer.						

⚠ The customer is base complete. Incomplete to submit customer, SPA or DTU for Customers in USA/CANADA only. Why?

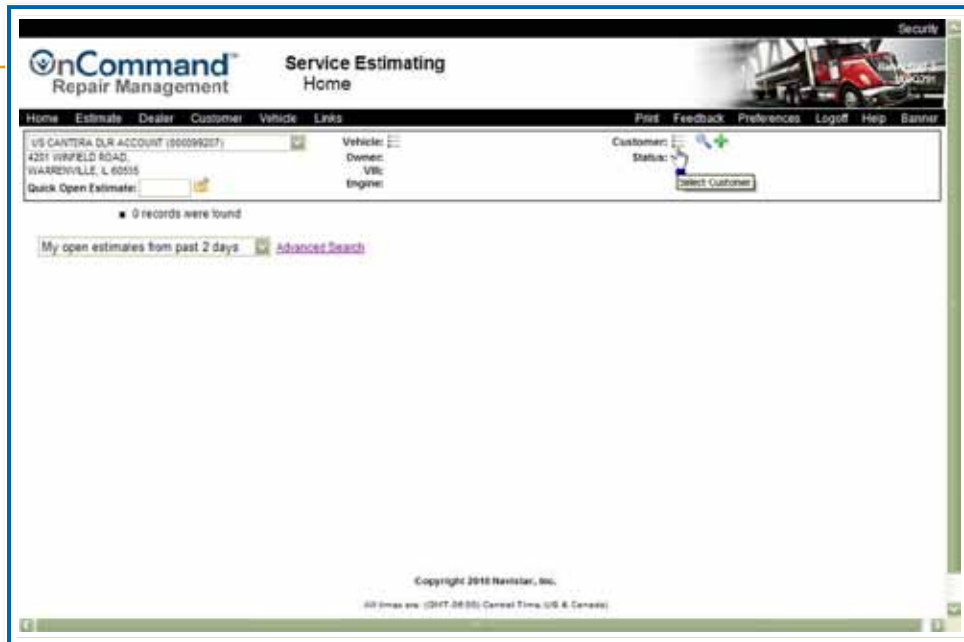
⚠ Customer number requirements are now in effect. See Policy Letter.

The new contact now appears
in the Contacts tab.

This image shows a full page of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page, typical of notebook paper. There are no margins, text, or other markings on the page.

LESSON 10: CREATING AN ESTIMATE

Now let's look at what's required to create a new estimate. Marcel's Cartage has brought in a vehicle for service. In the following simulation, you'll select the customer and vehicle to begin the estimate process. You'll then add operations and parts to complete the estimate.



This simulation begins in the Service Estimating System at the Service Estimating Home screen. To select the customer, click on the List icon after Customer in the Estimate header.

LESSON 10: CREATING AN ESTIMATE

The screenshot shows the 'nCommand Service Estimating Home' interface. At the top, there's a navigation bar with links: Home, Estimate, Dealer, Customer, Vehicle, Links, Print, Feedback, Preferences, Logout, Help, and Banner. Below this, a form area contains fields for 'US CANTERA DLR ACCOUNT (000099207)', '4201 WINFIELD ROAD, WARRENVILLE, IL 60555', and a 'Quick Open Estimate' button. To the right, there are dropdowns for 'Vehicle:', 'Owner:', 'VIR:', and 'Engine:', along with a 'Customer:' dropdown and a 'Status:' dropdown. Below the form, a 'Select Customer' section is visible, featuring a search box with 'mar' entered and a 'Search' button. The search results area is currently empty, indicating '0 records were found'.

Begin by clicking in the Search text box. Type the first three letters of the customer name, Marcel's Cartage. Click the Search button.

The screenshot shows the same 'nCommand Service Estimating Home' interface, but now with search results displayed. The 'Select Customer' section shows a search box with 'mar' entered and a 'Search' button. Below the search box, a table lists the search results. The table has columns for 'Name', 'Company', and 'Deleted'. The first row is highlighted, showing 'Marcel's Cartage' as the name and 'Marcel's Cartage' as the company. A callout points to the 'Name' link in the first column of the table.

Name	Company	Deleted
Marcel's Cartage	Marcel's Cartage	Yes
MARCO Systems	MARCO Systems	Yes
Mark Zoloci	Mark Zoloci	Yes
Markham Test	Markham Test	Yes
Markham Trucking	Markham Trucking	Yes
Markham	Markham	Yes
Mark	Mark	Yes

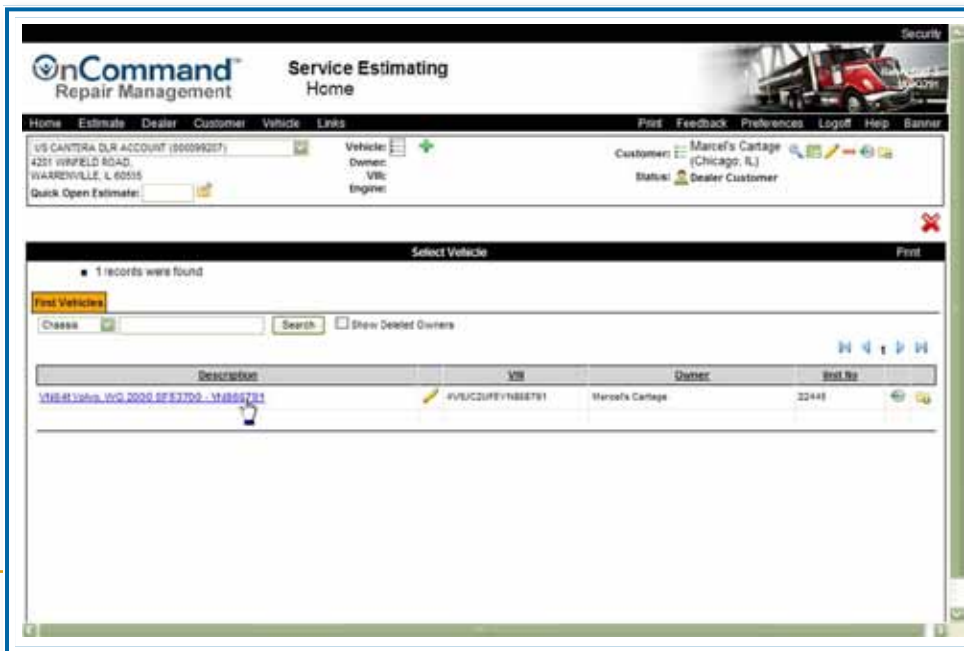
Select Marcel's Cartage from the list by clicking on the Name link.

LESSON 10: CREATING AN ESTIMATE



Now you'll select the vehicle.
Click the List icon after Vehicle
in the Estimate header.

LESSON 10: CREATING AN ESTIMATE



OnCommand Repair Management Service Estimating Home

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CANTRIA DLX ACCOUNT (80099227) Vehicle: +
4251 WINDFELD ROAD Owner: Marcel's Carriage
WARRENVILLE, IL 60555 VIN: 4V5U2U8F1N88791 Customer: Marcel's Carriage (Chicago, IL)
Quick Open Estimate: Status: Dealer Customer

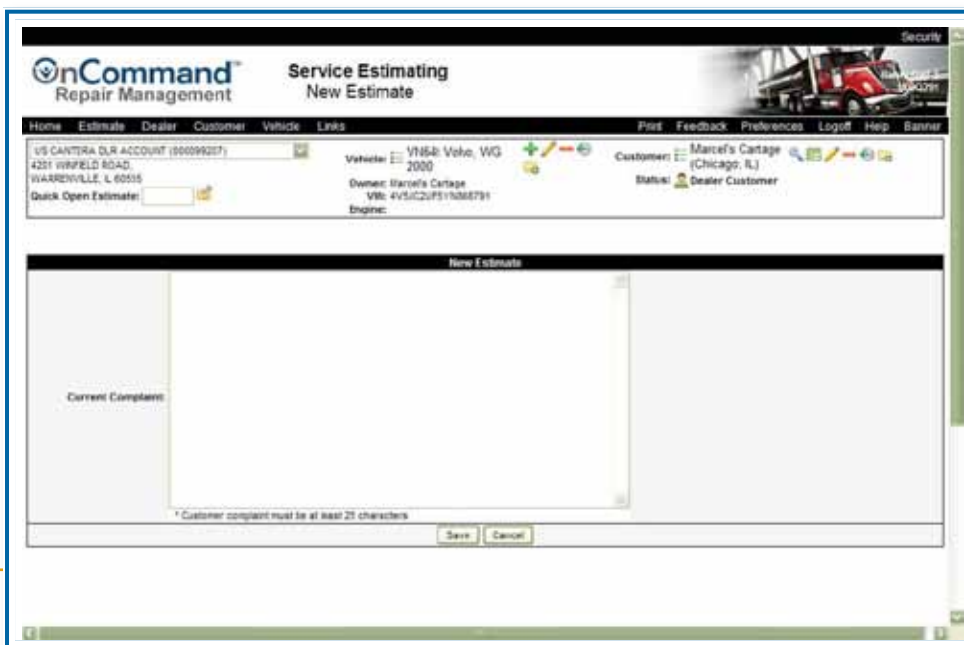
Select Vehicle 1 records were found Print

First Vehicles

Chassis Search Show Deleted Owners

Description	VIN	Owner	Est. No.
V1654 Volvo, WG, 2000, SF3709, V1654731	4V5U2U8F1N88791	Marcel's Carriage	22448

Click the Description link.



OnCommand Repair Management Service Estimating New Estimate

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CANTRIA DLX ACCOUNT (80099227) Vehicle: V1654 Volvo, WG +
4251 WINDFELD ROAD Owner: Marcel's Carriage Customer: Marcel's Carriage (Chicago, IL)
WARRENVILLE, IL 60555 VIN: 4V5U2U8F1N88791 Status: Dealer Customer
Quick Open Estimate:

New Estimate

Current Complaint

* Customer complaint must be at least 25 characters

Save Cancel

The New Estimate screen opens.

LESSON 10: CREATING AN ESTIMATE

The screenshot shows the 'nCommand Service Estimating New Estimate' web application. The top navigation bar includes links for Home, Estimate, Dealer, Customer, Vehicle, and Links. The main form area is divided into two sections. The top section contains fields for 'US CANTERA OUR ACCOUNT (800992227)', 'Vehicle: 2000', 'Customer: Marcel's Carriage (Chicago, IL)', and 'Status: Dealer Customer'. The bottom section is titled 'New Estimate' and features a large text area labeled 'Current Complaint:' with the text 'Customer reports that the engine is overheating'. Below this text area is a note: '* Customer complaint must be at least 25 characters'. At the bottom of the form are 'Save' and 'Cancel' buttons.

Now enter the customer's complaint.

- Begin by clicking in the Current Complaint text field. A minimum of 25 characters is required. Type in "Customer reports that the engine is overheating."
- Once you've entered the customer complaint, click the Save button.

LESSON 10: CREATING AN ESTIMATE

OnCommand Repair Management Service Estimating Estimate

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CENTRAL ILL. ACCOUNT (40400007) Vehicle: 17654 Volvo WG 2008 Owner: Marco's Carriage Customer: Marco's Carriage (Chicago, IL) Status: Dealer Customer
4251 WIRFIELD ROAD, WARRENVILLE, IL 60555 VIN: 4V51C2U91VMD8791 Engine:

Quick Open Estimate: [button]

Estimate #32003 Created: 2010-08-24 / Hahn, Gal S. Assigned: Hahn, Gal S

Operations Print Fees Attachments E-Mail Notes Assignment

Phone: 1112224488 DMV: 234 W. West St., Chicago, IL 60601 (pr) Make: Volvo Year: 2008 Status: Working Close Estimate
Non-Pest Estimate Warranty Start: 10/4 Unit No: 22445 Mileage: 0 Use
Engine Ser: Recall APC: RO Number: Save

Add Operations Add Add Labor Adjustment Add Parts Adjustment Add Performance P1

Other Info

Complaint: Customer reports that the engine is overheating
In Service: 10/4
Series:
Family:
Application:
Navistar equipment: INTERNATIONAL 7500 Series 7500 Family 7500 SFA 6X4

Notes

+ 2010/08/24 02:05 (Dealer) - Hahn, Gal S - Customer reports that the engine is overheating

Taxable Items

Part	Amount
Parts	\$0.00
Core Credits	\$0.00
Labor	\$0.00
Shop Supplies	\$0.00
Tax	\$0.00
Total	\$0.00

Non-Taxable Items

Part	Amount
Hazardous Waste	\$0.00
Freight	\$0.00
Total	\$0.00

The estimate is populated with customer and vehicle information.

OnCommand Repair Management Service Estimating Estimate

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CENTRAL ILL. ACCOUNT (40400007) Vehicle: 17654 Volvo WG 2008 Owner: Marco's Carriage Customer: Marco's Carriage (Chicago, IL) Status: Dealer Customer
4251 WIRFIELD ROAD, WARRENVILLE, IL 60555 VIN: 4V51C2U91VMD8791 Engine:

Quick Open Estimate: [button]

Estimate #32003 Created: 2010-08-24 / Hahn, Gal S. Assigned: Hahn, Gal S

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Non-Pest Estimate Warranty Start: 10/4 Unit No: 22445 Mileage: 0 Use
Engine Ser: Recall APC: RO Number: Save

Add Operations thermostat Add Add Labor Adjustment Add Parts Adjustment Add Performance P1

Other Info

Complaint: Customer reports that the engine is overheating
In Service: 10/4
Series:
Family:
Application:
Navistar equipment: INTERNATIONAL 7500 Series 7500 Family 7500 SFA 6X4

Notes

+ 2010/08/24 02:05 (Dealer) - Hahn, Gal S - Customer reports that the engine is overheating

Taxable Items

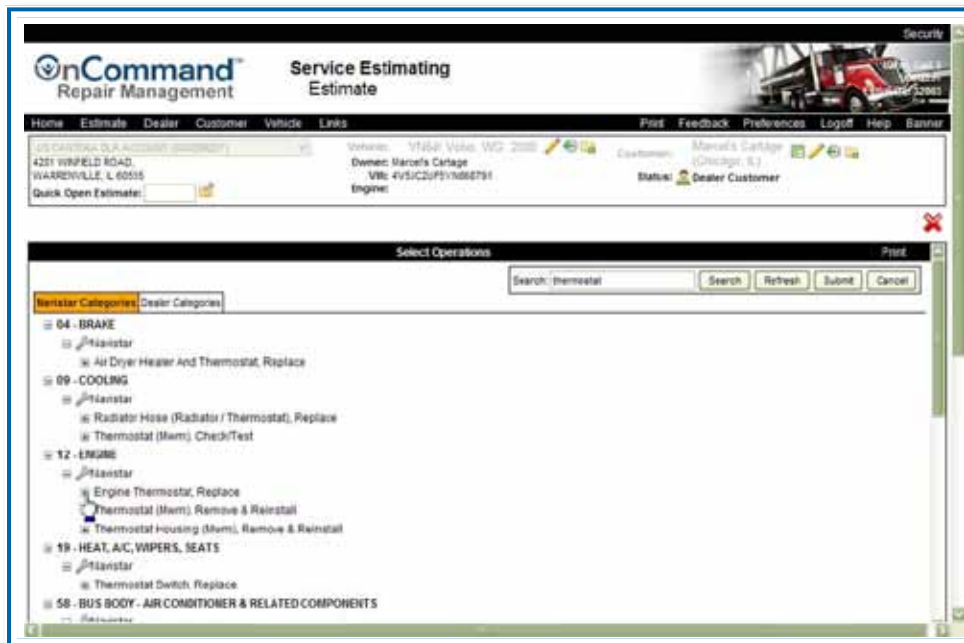
Part	Amount
Parts	\$0.00
Core Credits	\$0.00
Labor	\$0.00
Shop Supplies	\$0.00
Tax	\$0.00
Total	\$0.00

Non-Taxable Items

Part	Amount
Hazardous Waste	\$0.00
Freight	\$0.00
Total	\$0.00

Now generate a list of operations, select the associated parts and then submit them all at once. Begin by clicking in the Add Operation text box. Type in your search term, thermostat. Click the Add button.

LESSON 10: CREATING AN ESTIMATE



- This generates a list of operations related to the term that was searched on. Expand the Engine Thermostat, Replace operation.

LESSON 10: CREATING AN ESTIMATE

OnCommand Repair Management Service Estimating Estimate

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

Vehicle: 1Y1664 Vehicle: WG 2008
 4251 WINDFELD ROAD, WARRENVILLE, IL 60555
 Owner: Marcel's Carriage
 VIN: 4V51C29P9VMD6791
 Engine:
 Customer: Marcel's Carriage (Chicago, IL)
 Status: Dealer Customer

Quick Open Estimate: [button]

Select Operations [Print]

Search: flush [Search] [Refresh] [Submit] [Cancel]

Operation Categories Dealer Categories

- 04 - BRAKE
 - Hydrolator
 - Air Dryer Heater And Thermostat, Replace
- 09 - COOLING
 - Hydrolator
 - Radiator Hose (Radiator / Thermostat), Replace
 - Thermostat (Main), Check/Test
- 12 - ENGINE
 - Hydrolator
 - Engine Thermostat, Replace

SRT Code	Description	SRT Time	Est Time	Match
☐ A12-4220	7100, MaxxForce 11/13, One or both	1.7	2.5	Family
☐ A12-4221	RE200 RE300, MaxxForce 9/10/CT	1.4	2	Family
☐ A12-5221	Other Models, MaxxForce 11/13, One or both	1.1	1.5	Family
☐ A12-4220	Other Models, All Other Engines	0.9	1.5	Family
☐ A12-4222	Models, All, STAMER70, Beginning with Engine Ser	1.0	1.5	Family

Now search on the next term. In this case, we also need to flush the radiator. Begin by double-clicking in the Search text field. Type flush into the field. Click the Search button.

LESSON 10: CREATING AN ESTIMATE

OnCommand Repair Management Service Estimating Estimate

Home Estimate Dealer Customer Vehicle Links Part Feedback Preferences Logout Help Banner

4251 WINFELD ROAD, WARRENVILLE, IL 60558 Quick Open Estimate

Vehicle: VHS41 Volvo, V90 2005 Owner: Marcell's Carriage Customer: Marcell's Carriage (Chicago, IL) Status: Dealer Customer

Vehicle VIN: 4V5J2UPT1M66791 Engine:

09 - COOLING

13 - TRANSMISSION

19 - HEAT, A/C, WIPERS, SEATS

58 - BUS BODY - AIR CONDITIONER & RELATED COMPONENTS

Search: flush Search Refine Submit Cancel

SRT Code	Description	SRT Time	Est Time	Match
425-200	All Models Models, ALL, Complete Flush	1.0	1.5	Family

Click in the scroll bar to scroll down the operations until you see a new entry for Cooling System, Flush. To expand the operation, click on the plus sign in front of it.

LESSON 10: CREATING AN ESTIMATE

OnCommand Repair Management Service Estimating Estimate

Home Estimate Dealer Customer Vehicle Links Post Feedback Preferences Logout Help Banner

Vehicle: 174548 Volvo WG 2008 Owner: Marco's Carriage Customer: Marco's Carriage (Chicago, IL) Status: Dealer Customer

Quick Open Estimate: [button]

Estimate Categories Dealer Categories

12 - ENGINE

Search: / flush [Search] [Refresh] [Submit] [Cancel]

SET Code	Description	SET Time	Est Time	Match
☐ A12-5220	7100, MaxForce 11/13, One or both	1.7	2.5	Family
☐ A12-4223	RE200 RE300, MaxForce 9/10/CT	1.8	2	Family
☐ A12-5221	Other Models, MaxForce 11/13, One or both	1.1	1.5	Family
☒ A12-4220	Other Models, All Other Engines	0.9	1.5	Family
☐ A12-4222	Models, ALL, DT486/570, Beginning with Engine Ser #00000001	1.0	1.5	Family
☐ A12-3220	All Others, DT 466/535, DT 466/535E	0.5	1	Family
☐ A12-2221	All Others, T444E	0.7	1	Series

04 - BRAKE

09 - COOLING

Now select specific operations by clicking the radio buttons in front of those you want. Begin by clicking the radio button in front of A12-4220.

LESSON 10: CREATING AN ESTIMATE

OnCommand Repair Management Service Estimating Estimate

Home Estimate Dealer Customer Vehicle Links Post Feedback Preferences Logout Help Banner

Vehicle: 1Y166P Volo, WI 2008
 Owner: Marcel's Carriage
 VIN: 4V51C2U95VMD6791
 Engine:

Customer: Marcel's Carriage (Chicago, IL)
 Status: Dealer Customer

Quick Open Estimate: [icon]

Part	Part Number	Description	Est. Time	Est. Price	Match
☐	A12-5221	Other Models, MaxxForce 11/13, One or both	1.1	1.5	Family
☒	A12-4220	Other Models, All Other Engines	1.0	1.5	Family
☐	A12-4222	Models, ALL, DT466/570, Beginning with Engine Ser #0000001	1.0	1.5	Family
☐	A12-2220	All Others, DT-466/530, DT-466/530E	0.5	1	Family
☐	A12-2221	All Others, T444E	0.7	1	Series

Search: flush [Search] [Refresh] [Submit] [Cancel]

- 04 - BRAKE
 - Navistar
 - Air Brake System, Clean/Flush
- 09 - COOLING
 - Navistar
 - Cooling System, Flush
- 13 - TRANSMISSION
 - Navistar
 - Transmission Oil Cooler And Lines, Flush
- 19 - HEAT, A/C, WIPERS, SEATS
 - Navistar

SRT Code	Description	SRT Time	Est Time	Match
A12-220	All Models Models, ALL, Complete Flush	1.0	1.5	Family

Click in the scroll bar to see the Cooling System, Flush operation. There is only one operation for Cooling System, Flush. Click the radio button in front of it.

LESSON 10: CREATING AN ESTIMATE

OnCommand Repair Management Service Estimating Estimate

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

Vehicle: 17164P Volvo WG 2008
 Owner: Marco's Carriage
 VIN: 4V51C2U95VMD6791
 Engine:

Customer: Marco's Carriage (Chicago, IL)
 Status: Dealer Customer

Quick Open Estimate: [icon]

Select Operations Print

Search: / Refresh Search Refresh Submit Cancel

12 - ENGINE

Engine Thermostat, Replace

Part Code	Description	SRT Time	Est Time	Match
☐ A13-5220	7500, MaxForce 11/13, One or both	1.7	2.5	Family
☐ A13-4223	RE200 RE300, MaxForce 3/10/CT	1.4	2	Family
☐ A13-5221	Other Models, MaxForce 11/13, One or both	1.1	1.5	Family
☒ A13-4220	Other Models, All Other Engines	0.9	1.5	Family
☐ A13-4222	Models, ALL, DT466/570, Beginning with Engine Ser #0000001	1.0	1.6	Family
☐ A13-3220	All Others, DT-466/530, DT-466/530B	0.5	1	Family
☐ A13-3221	All Others, T444E	0.7	1	Series

04 - BRAKE

Brake System, Clean/Flush

The Parts links are now active for these two operations. Click in the scroll bar to scroll back to the top to select a thermostat. Click the Parts link.

LESSON 10: CREATING AN ESTIMATE

Assigned Parts

Search Parts

Adding Parts For Operation: ENGINE THERMOSTAT, REPLACE

Submit

Get Prices

Close

Advisor Parts							
Part Number	Part Name	Qty	Price	Core	Action		
		1			Add		

Navistar Parts								
Part Number	Service Note	Part Name	Qty	Price	Core	MktMeth	CostCode	Inventory
THERMOSTAT, ENG(123-9090-001)								
☐		THERMOSTAT	1					
☒	Use Assembly Part	THERMOSTAT	1					
FLUID, RADIATOR RUST REMEDFOR(19-3545-005)								
TUBE, RADIATOR OUTLET OR INLET(123-9490-001)								
☒	Not Serviced - Order Kit	TUBE FILTER INLET	1					
CLAMP, RADIATOR INLET(123-1645-007)								
☐		CLAMP HEAT EXCHANGER	1					
☒		CLAMP RADIATOR INLET	1					
☒		CLAMP HOSE 5/16" x 9/32"	1					
GASKET, THERMOSTAT(123-3720-025)								
SEAL, THERMOSTAT(123-7465-051)								

Although Navistar has made its best efforts to be accurate in parts identification and costs, Navistar cannot provide a guarantee to the part identification and cost accuracy. This information is provided on an "as is" basis.

Navistar Part Provider (patent pending)

The Parts dialog box opens. To display parts prices, click the Get Prices button.

LESSON 10: CREATING AN ESTIMATE

Assigned Parts Search Parts

Adding Parts For Operation: ENGINE THERMOSTAT, REPLACE

Submit Get Prices Close

Advisor Parts

Part Number	Part Name	Qty	Price	Core	Action
		1			Add

Navistar Parts

Part Number	Service Note	Part Name	Qty	Price	Core	MktMeth	ConsCode	Inventory
THERMOSTAT, ENG(123-9080-001)								
☐ 1830256C93		THERMOSTAT	1	\$20.81	\$0.00			
☒ 1830129C2	Use Assembly Part	THERMOSTAT	1	\$27.83	\$0.00			
FLUID, RADIATOR RUST REMOVER(19-3545-005)								
TUBE, RADIATOR OUTLET OR INLET(123-9490-001)								
☒ 1825609C1	Not Serviced - Order Kit	TUBE FILTER INLET	1					
CLAMP, RADIATOR INLET(123-1645-007)								
☐ 2506704C1		CLAMP HEAT EXCHANGER	1	\$9.63	\$0.00			
☒ 2506704C1 (3535643R1)		CLAMP RADIATOR INLET	1	\$9.63	\$0.00			
☒ 299492C1 (299491C1)		CLAMP HOSE 5/16" x 9/32"	1	\$2.66	\$0.00			
GASKET, THERMOSTAT(123-3720-025)								
SEAL, THERMOSTAT(123-7460-051)								

Although Navistar has made its best efforts to be accurate in parts identification and costs, Navistar cannot provide a guarantee to the part identification and cost accuracy. This information is provided on an "as is" basis.

Navistar Part Provider (patent pending)

Select the second thermostat by clicking the checkbox in front of it. Click the Submit button.

LESSON 10: CREATING AN ESTIMATE

The screenshot shows the 'Service Estimating Estimate' window in OnCommand Repair Management. The 'Select Operations' dialog is open, displaying a list of operations and parts. The 'Submit' button is highlighted with a yellow arrow.

SET Code	Description	SET Time	Est Time	Match
☐ A13-5220	7500, MaxForce 11/13, One or both	1.7	2.5	Family
☐ A13-4223	R200 RE300, MaxForce 3/10/CT	1.4	2	Family
☐ A13-5221	Other Models, MaxForce 11/13, One or both	1.1	1.5	Family
☒ A13-4220	Other Models, All Other Engines	0.9	1.5	Family
☐ A13-4222	Models, ALL, DT400/570, Beginning with Engine Ser #0000001	1.0	1.6	Family
☐ A13-3220	All Others, DT-400/570, DT-400/570	0.5	1	Family
☐ A13-2221	All Others, T444E	0.7	1	Series

Once you've selected all the operations and parts you need, click the Submit button.

The screenshot shows the 'Service Estimating Estimate' window in OnCommand Repair Management. The 'Estimate' window is open, displaying the selected operations and parts. The 'Submit' button is highlighted with a yellow arrow.

Info	Operation	Declined	Warranty	Labor	Parts	Core	Total
☒	Engine ENGINE THERMOSTAT REPLACE A13-4220 Other Models, All Other Engines (3.5hr + 30% + 1.5hr)	☐	☐	\$147.00	\$27.83	\$0.00	\$174.83
☒	Cooling COOLING SYSTEM FLUSH A05-230 All Models Models, ALL, Complete Flush (1hr + 30% + 1.5hr)	☐	☐	\$147.00	\$0.00	\$0.00	\$147.00

The selected operations are now displayed. This includes costs for the parts that were selected.

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

LESSON 11: USING ADDITIONAL ESTIMATE FEATURES

Once you've chosen the operations and parts you need to complete your estimate, there are several other features you may wish to use as you continue to develop an estimate. In the following simulation, you'll practice how to:

- Add attachments to an estimate
- E-mail the estimate to your customer
- Add notes that document your interaction with the customer

Attachments

The screenshot displays the OnCommand Repair Management Service Estimating Estimate interface. The top navigation bar includes links for Home, Estimate, Dealer, Customer, Vehicle, Links, Print, Feedback, Preferences, Logout, Help, and Banner. The main form contains fields for vehicle information (VIN, Year, Make, Model, Engine), customer details (Name, Address, Phone, Email), and a list of operations. The 'Attachments' link is highlighted in the top navigation bar. The 'Operations' section shows a table with columns for Info, Operation, Declined, Warranty, Labor, Parts, Core, and Total. The 'Attachments' link is also visible in the bottom right corner of the form.

First, you're going to add an attachment to this estimate. This attachment should already be saved on your computer. Click the Attachments link.

LESSON 11: USING ADDITIONAL ESTIMATE FEATURES

Repair Management Estimate

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

4201 WINFIELD ROAD
WARRENVILLE, IL 60555
Quick Open Estimate: []

Vehicle: 1984 Volvo WG 2010
Owner: Marotta Carage
VIN: 4V5JC2P5YH82791
Engine:

Customer: Marotta's Carage
(Chicago, IL)
Status: Dealer Customer

Attachments Print

Description	File
	File: C:\Documents and Settings\j... \Documents\Thermostat Specs URL: [] File Title: Thermostat Specs [Upload] [Refresh]

Add Attachment:

Files must be less than 2 MB in size and must be one of the following file types: DOC, DOCX, XLS, XLSX, PDF, TXT, GIF, JPG, JPEG, PNG, ZIP, XML. In lieu of a file you can just specify a link URL, or specify both, the URL will be appended to the communication.

Estimate Documents:
Operation Documents:

Non-Taxable Items
Hazardous Waste: \$20.00

- Now select the document to attach. Begin by clicking the Browse button. Click on the PDF document titled Thermostat Specs. You must also provide a descriptive file title. Begin by clicking in the file title text box. Type Thermostat Specs, then click the Upload button.

Repair Management

Estimate

[Home](#)
[Estimate](#)
[Dealer](#)
[Customer](#)
[Vehicle](#)
[Links](#)

[Print](#)
[Feedback](#)
[Preferences](#)
[Logout](#)
[Help](#)
[Banner](#)

We are a GoDaddy .US account (200808227)

Vehicle: 1984 Volvo 700 2000

Owner: Marisa's Carage

VIN: 4V5CZP5Y3M30791

Engine:

(customer): Marisa's Carage (Chicago, IL)

Status: Dealer Customer

4201 WINFIELD ROAD,
WARRENVILLE, IL 60555

Quick Open Estimate:

Attachments

Document uploaded successfully.

Description	Estimate Attachments												
Add Attachment: File: URL: File Title: Upload Refresh	Files must be less than 2 MB in size and must be one of the following file types: DOC, DOCX, XLS, XLSX, PDF, TXT, GIF, JPG, JPEG, PNG, ZIP, XSL, in lieu of a file you can just specify a link URL, or specify both, this URL will be appended to the communication												
Estimate Documents: Operation Documents:	<table border="1"> <thead> <tr> <th>File</th> <th>Title</th> <th>URL</th> <th>Uploaded</th> <th>User</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td>Thermostat Specs.pdf</td> <td>Thermostat Specs</td> <td></td> <td>9/24/2010 3:58:37 PM</td> <td>U012291</td> <td>Delete</td> </tr> </tbody> </table>	File	Title	URL	Uploaded	User	Delete	Thermostat Specs.pdf	Thermostat Specs		9/24/2010 3:58:37 PM	U012291	Delete
File	Title	URL	Uploaded	User	Delete								
Thermostat Specs.pdf	Thermostat Specs		9/24/2010 3:58:37 PM	U012291	Delete								

Download

Non-Taxable Items

Gasoline

Ytaste

\$20.00

- ## Notes

Repair Management		Estimate																											
Home Estimate Dealer Customer Vehicle Links				Print Feedback Preferences Logout Help Banner																									
No Complaint ILS document submitted Vehicle: VIN#A Y86A WG 2000 4201 WINFIELD ROAD, WARRENVILLE, IL 60555 Owner: Maricela Carpage VIN: #VJCUZPSYMB02791 Quick Open Estimate: Engine:		Maricela Carpage (Chicago, IL) Status: Dealer Customer																											
Document changes were accepted																													
Estimate #32003 Created: 2010-08-24 / Hahn, Gail S Assignment: Hahn, Gail S																													
Operations Print Parts Catalog Fees Attachments E-Mail Notes Assignment																													
Phone: 71212234455 DMIS 234 W. West St. Chicago, IL 60601 Non-Fleet Estimate Vehicle: Hahn, Gail S Warranty Start: N/A Engine Ser: R0441AFC Years: 2000 Unit No: 22445 Status: Working Close Estimate Mileage: 0 Miles RO Number: Save																													
Add Operations Add Add Labor Adjustment Add Parts Adjustment Add Performance PSI																													
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Info</th> <th style="width: 40%;">Operation</th> <th style="width: 10%;">Desired</th> <th style="width: 10%;">Warranty</th> <th style="width: 10%;">Labor</th> <th style="width: 10%;">Parts</th> <th style="width: 10%;">Core</th> <th style="width: 10%;">Total</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">✖ </td> <td> Engine/ENGINE THERMOSTAT REPLACE #12-4228 Other Models, All Other Engines (3.9L + 38% + 1.5hr) </td> <td style="text-align: center;">☐</td> <td style="text-align: center;">☐</td> <td style="text-align: right;">\$147.00</td> <td style="text-align: right;">\$27.00</td> <td style="text-align: right;">\$0.00</td> <td style="text-align: right;">\$174.00</td> </tr> <tr> <td style="text-align: center;">✖ </td> <td> Cooling COOLING SYSTEM FLUSH A09-200 All Models. ALL - Complete Flush (3hr + 38% + 1.5hr) </td> <td style="text-align: center;">☐</td> <td style="text-align: center;">☐</td> <td style="text-align: right;">\$147.00</td> <td style="text-align: right;">\$0.00</td> <td style="text-align: right;">\$0.00</td> <td style="text-align: right;">\$147.00</td> </tr> </tbody> </table>						Info	Operation	Desired	Warranty	Labor	Parts	Core	Total	✖	Engine/ENGINE THERMOSTAT REPLACE #12-4228 Other Models, All Other Engines (3.9L + 38% + 1.5hr)	☐	☐	\$147.00	\$27.00	\$0.00	\$174.00	✖	Cooling COOLING SYSTEM FLUSH A09-200 All Models. ALL - Complete Flush (3hr + 38% + 1.5hr)	☐	☐	\$147.00	\$0.00	\$0.00	\$147.00
Info	Operation	Desired	Warranty	Labor	Parts	Core	Total																						
✖	Engine/ENGINE THERMOSTAT REPLACE #12-4228 Other Models, All Other Engines (3.9L + 38% + 1.5hr)	☐	☐	\$147.00	\$27.00	\$0.00	\$174.00																						
✖	Cooling COOLING SYSTEM FLUSH A09-200 All Models. ALL - Complete Flush (3hr + 38% + 1.5hr)	☐	☐	\$147.00	\$0.00	\$0.00	\$147.00																						
Other Info				Taxable Items																									
Complaint: Customer reports that the engine is overheating In Service: N/A Series: Family: Application: Navistar equipment: INTERNATIONAL 7500 Series 7510 Family 7510 EPA 604				Parts: Core credits ☒ \$0.00 Labor: \$294.00 Shop Supplies: \$23.10 Tax ☒ \$23.61 Non-Taxable Items Hazardous Waste: \$20.00 \$27.00 \$0.00 \$294.00 \$23.10 \$23.61 \$20.00																									
Notes																													
2010/08/24 02:05 (Dealer) - Hahn, Gail S - Customer reports that the engine is overheating																													

- To add a note to this estimate, click the Notes link.

LESSON 11: USING ADDITIONAL ESTIMATE FEATURES

The screenshot shows the 'Estimate' screen in the Repair Management system. The top navigation bar includes 'Home', 'Estimate', 'Dealer', 'Customer', 'Vehicle', and 'Links'. The main header area displays vehicle and customer information: 'Vehicle: 1984 Volvo, WG 2010', 'Owner: Marissa Carpage', 'VIN: 4V5JC2P5YH82791', 'Status: Dealer Customer', and 'Customer: Marissa Carpage (Chicago, IL)'. The 'Estimate Notes' window is open, showing a text box with the note 'Customer requests radiator flush service'. Below the text box are 'Add' and 'Refresh' buttons. The 'Add' button is highlighted with a yellow arrow. The 'Estimate Notes' window also displays a table of existing notes.

Time	User	Note	Pertains To	Delete
2010-08-24 14:05	U000291	20100824 02:01 (Dealer) - Marissa Carpage reports that the engine is overheating	Estimate (Customer Company)	Delete

Below the table, there are 'System Notes' and 'Non-Taxable Items' sections. The 'Non-Taxable Items' section shows 'Hazardous Waste' for \$20.00.

The Estimate Notes window opens. Begin by clicking in the Notes text box. Type the following comment: Customer requests additional radiator flush service. Click the Add button. The Note has been added. Now click the red X in the upper right corner to return to the Estimate screen.

LESSON 11: USING ADDITIONAL ESTIMATE FEATURES

The e-mail address will pre-populate if one has been assigned for you. If not, you'll need to enter it.

- Begin by clicking in the From box. Type in the e-mail address, c.jones@navistar.com.
- Send the email to the Service-primary contact by clicking the checkbox for the Service-primary contact.
- Click the Send button.

To return to the Estimate screen, click the red X in the upper right corner.

NOTES

[illegible]

LESSON 12: ADDING A NON-INTERNATIONAL TRUCK

Whenever you first work on a non-International truck, it must be added to the system and mapped to the Navistar model that it matches most closely.

In the following simulation, you are working on a Mack truck for Gary's Trucking for the first time. You'll start your estimate as you normally would, but then add this new vehicle, associating it with the appropriate Navistar model.

OnCommand[™] Repair Management Service Estimating Home

Home Estimate Dealer Customer Vehicle Links Post Feedback Preferences Logout Help Banner

CANTERA US DJR TEST ACCT:00000000 Vehicle: 4201 150P6LD RD
 4201 150P6LD RD Owner: VMS
 Quick Open Estimate: Engine:

2 records were found

My open estimates from past 2 days [Advanced Search](#)

Estimate (RD)	Account	Total	Vehicle	Unit	Customer	Status	Assigned	Changed
16704	000098-010	\$275.22	2004 - 8100 - 8100 SBA 4X2 - HTS30 150HP/311HP PEAK 2200 GOV - 1/220436		Get Y Done	Working	Rahn, Gal S	2010-07-29
16703	000098-010	\$0.00	2002 - 4300 - 4300 SBA 4X2 - DT466 ST 210 NRQ37HP PEAK 2600 GOV - 2H542704		Get Y Done	Working	Rahn, Gal S	2010-07-29

[Edit Vehicle](#)
 Requires first post (or clear)
 No dealer customer access in that account
[Post](#)

[Create New Estimate For Customer](#)
 Customer type is dealer customer
 Unread floor note present

[Create New Estimate For Vehicle](#)
 Customer type is service partner
 Not current account

To select the customer, click on the Customer List icon.

LESSON 12: ADDING A NON-INTERNATIONAL TRUCK

The screenshot shows the 'OnCommand Repair Management' interface. At the top, there's a navigation bar with links: Home, Estimate, Dealer, Customer, Vehicle, Links. Below this, there's a search area with fields for Vehicle, Owner, VIN, and Engine. A 'Quick Open Estimate' button is also present. The 'Select Customer' section is active, showing a search for 'Gary' with 2 records found. The search button is highlighted.

Begin by clicking in the Search text box. Type in Gary. Click the Search button.

The screenshot shows the 'OnCommand Repair Management' interface. The 'Select Customer' section shows a search for 'Gary' with 33 records found. A table of results is displayed with columns: Name, Company, and Selected. The 'Name' link is highlighted in the first row of the list.

Name	Company	Selected
GARY L RESNORD SOG	GARY L RESNORD SOG	N
GARY L RIVERS	GARY L RIVERS	N
GARY O'BRIEN	GARY O'BRIEN	N
GENE MICHEL ROEBUCK	GENE MICHEL ROEBUCK	N
GENEVA ROCK PRODUCTS INC	GENEVA ROCK PRODUCTS INC	N
GEORGE HARE	GEORGE HARE	N
GARY'S TRUCKING	GARY'S TRUCKING	N
GLAYDES ELEC CO-OP	GLAYDES ELEC CO-OP	N
GLENN KIRK	GLENN KIRK	N
GOLDEN GEN GROWERS INC	GOLDEN GEN GROWERS INC	N

Select the customer from the list by clicking on the Name link.

LESSON 12: ADDING A NON-INTERNATIONAL TRUCK

nCommand
Repair Management

Service Estimating Home

Home Estimate Dealer Customer Vehicle Links

Vehicle: Owner: Engine:

Customer: Status:

Quick Open Estimate:

My open estimates from past 2 days [Advanced Search](#)

Estimate (RQ)	Account	Total	Vehicle	Unit	Customer	Status	Assigned	Changed
16704	\$00098-010	\$275.22	2006 - 8000 - 8000 584 4X2 - HT530 100HP/115HP PEAK 2200 GVW - LUG25436		Get 'Y Done	Working	Mahn, Gal S.	2010-07-29
16703	\$00098-010	\$0.00	2002 - 4300 - 4300 584 4X2 - DT486 ST 230 HP/237HP PEAK 2600 GVW - 2M542704		Get 'Y Done	Working	Mahn, Gal S.	2010-07-29

[Edit Vehicle](#)
Requires text post (or course)
No dealer customer access in that account

[Create New Estimate For Customer](#)
Customer type is dealer customer
Unread Rep. note present

[Create New Estimate For Vehicle](#)
Customer type is service partner
Not current account

Once the customer has been selected,
click on the green plus sign after Vehicle.

LESSON 12: ADDING A NON-INTERNATIONAL TRUCK

The screenshot shows the 'OnCommand Repair Management' interface. The 'Vehicle' tab is selected, and a dropdown menu for 'Vehicle Type' is open, displaying a list of manufacturers including Ford, Freightliner, FIVE, OMC, Thomas Built Buses, and Mack Trucks. 'MACK TRUCKS' is highlighted. Below the dropdown, the 'VIN / Chassis No.' field is empty, and the 'Pricing Source' is set to 'Not Applicable'. The 'Vehicle Notes' field is also empty. The bottom of the form features 'Save', 'Save (and begin estimate)', and 'Return' buttons.

- Select the make of the truck being added from the Vehicle Type drop-down list.
 - Begin by clicking on the down arrow after Vehicle Type. The truck is a Mack. Click on MACK TRUCKS in the drop-down list.

LESSON 12: ADDING A NON-INTERNATIONAL TRUCK

The screenshot shows the 'Add Customer Vehicle' form in the OnCommand Repair Management system. The form is titled 'Service Estimating Add Customer Vehicle'. It includes a header with navigation links (Home, Estimate, Dealer, Customer, Vehicle, Links) and a user profile (Aaa Transport, Melrose Park, IL). The main form area has fields for Vehicle Type (Vehicle/Truck), Vehicle Description (1999 Mack model DM690S), VIN (1M2B209C5WM021052), Labor Pricing Source (Not Applicable), and Vehicle Make (Mack Trucks Inc.). Below these are fields for Associate To Service Model (4420 DBA 654), Display Make (Mack), Display Model (DM690S), Display Year (1998), and Display Engine. At the bottom are buttons for Save, Save (and begin estimate), and Return.

Type in the vehicle description, VIN and any other information available for this truck.

- Begin by clicking in the Vehicle Description field. This vehicle is a tractor. Type in Tractor: DM690S
- Next is the VIN. Begin by clicking in the VIN field. Type carefully to ensure that you don't transpose any digits. The VIN is 1M2B209C5WM021052.

LESSON 12: ADDING A NON-INTERNATIONAL TRUCK

The screenshot shows the OnCommand Repair Management Service Estimating interface. The sidebar on the left contains a list of vehicle models, including various Navistar models. The main area displays customer information (Aaa Transport, Melrose Park, IL) and vehicle details. A dropdown menu is open, showing a list of Navistar models, with the 7400 SBA 6x4 model highlighted. The interface includes buttons for 'Save', 'Save (and begin estimate)', and 'Return'.

Next select the Navistar model that is most similar to this vehicle from the Associate To Navistar Model drop-down list.

- Click on the down arrow after Navistar Model to open the list. The model that's most closely related to this truck is the 7400 SBA 6x4.
- Click on the scroll bar to scroll down to find it. Now you can see this model in the drop-down list. Click on it.

LESSON 12: ADDING A NON-INTERNATIONAL TRUCK

OnCommand Repair Management Service Estimating Add Customer Vehicle

Home Estimate Dealer Customer Vehicle Links Part Feedback Preferences Logout Help Banner

US CANTRA DLR ACCOUNT (000099237)
4251 WINFIELD ROAD
WARRENVILLE, IL 60558
Quick Open Estimate: [button]

Customer: Aaa Transport (Melrose Park, IL)
Status: Dealer Customer

Add Customer Vehicle

Vehicle Type: ☒ Vehicle / Truck (MACK TRUCKS INC.) ☐ New Vehicle / San Truck: State

Vehicle Description: 1998 Mack model DRAMS
VIN: 1N2B299C5M521852
Unit No.:
Labor Pricing Source: Not Applicable
Vehicle Make:

Model association is required

Associate To Revision Model: 4420 DBA-614
Display Make: Mack
Display Model: DRAMS
Display Year: 1998
Display Engine:

[Save] [Save (and begin estimate)] [Return]

- Now you'll fill in the rest of the information in this section of the screen, starting with the display year. This is a 1998 model. Begin by clicking on the down arrow after Display Year. Click on 1998 in the list.
- And the engine is a Mack. Begin by clicking in the Display Engine text box. Type Mack in the text box.

Once all available information has been entered, click the Save button.

LESSON 12: ADDING A NON-INTERNATIONAL TRUCK

OnCommand[™] Repair Management

Service Estimating
Add Customer Vehicle

Home Estimate Dealer Customer Vehicle Links

US CANTEIRA DLR ACCOUNT (00009027)
4201 SUNFELD ROAD
WARRENVILLE, IL 60055

Customer: Aaa Transport (Melrose Park, IL)
Status: Dealer Customer

Quick Open Estimate:

■ Non Navistar Vehicle added successfully.

Add Customer Vehicle

Vehicle Type: ☒ Vehicle / Truck / PETERBILT MOTORS CO. ☐ Non Vehicle / Non Truck / State

Vehicle Description: Tractor

VIN: 1XP0D45K500110020

Unit No:

Labor Pricing Source: Not Applicable

Vehicle Notes:

Model association is required

Associate To Navistar Model: PG02A4-834

Display Model: 2010

Display Year: 2010

Display Engine:

Save Return

A message that the vehicle was added successfully appears. Click the Save (and begin estimate) button.

OnCommand[™] Repair Management

Service Estimating
New Estimate

Home Estimate Dealer Customer Vehicle Links

US CANTEIRA DLR ACCOUNT (00009027)
4201 SUNFELD ROAD
WARRENVILLE, IL 60055

Vehicle: Tractor Peterbilt 2010
Owner: AAA Transport
VIN: 1XP0D45K500110020
Engine:

Customer: Aaa Transport (Melrose Park, IL)
Status: Dealer Customer

Quick Open Estimate:

New Estimate

Current Complaint:

* Customer complaint must be at least 25 characters

Save Cancel

Now continue creating an estimate as you would for an International truck.

[illegible]

LESSON 13: TRANSFERRING A TRUCK

You may also run into situations where the truck you are working on needs to be transferred from one customer to another. You can transfer the vehicle in the system by using the Transfer Vehicle function.

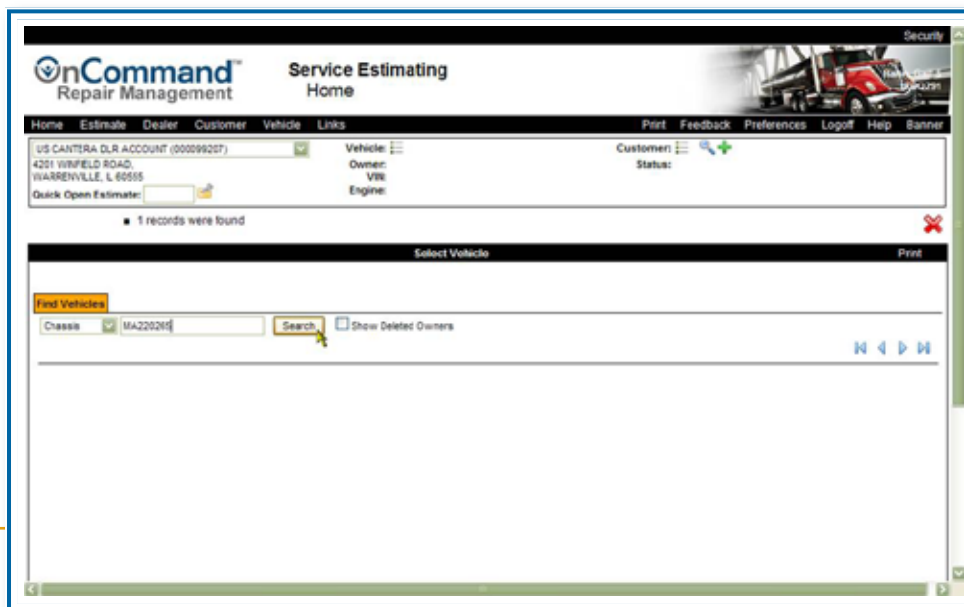
In the following simulation, you're working on a truck that, when selected, indicates a different customer than you've recorded. You will:

1. Select the vehicle
2. Select Transfer Vehicle from the Vehicle menu
3. Select the new owner
4. Transfer the vehicle



The truck you're working on is a dump truck with a chassis number of MA220265. You can select this vehicle by clicking on the List icon after Vehicle in the Estimate header.

LESSON 13: TRANSFERRING A TRUCK



OnCommand[™] Repair Management Service Estimating Home

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

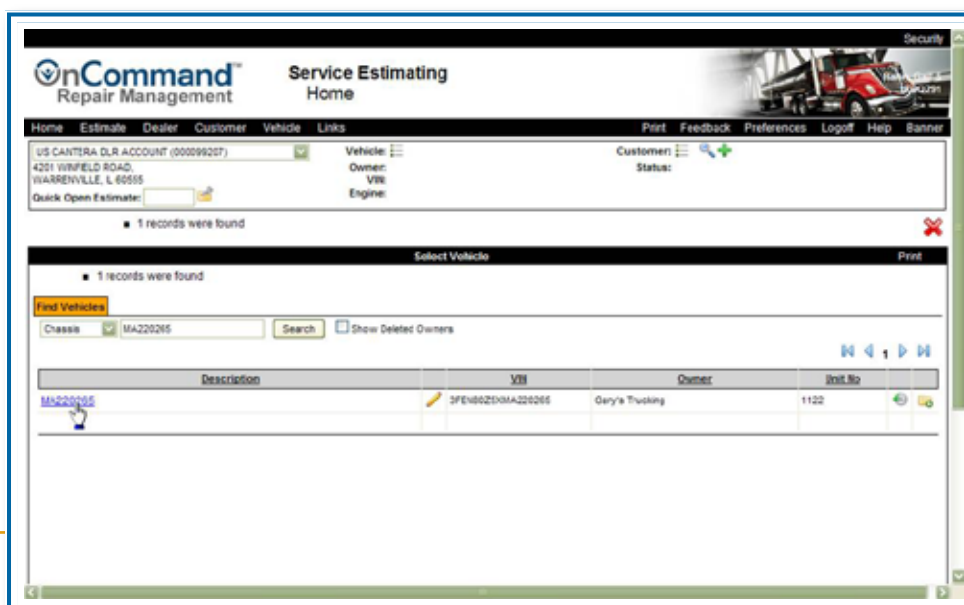
US CATERA DL ACCOUNT (00099207) Vehicle: Customer: 4201 WINFIELD ROAD, WARRENVILLE, IL 60555 Owner: VM Engine: Status: Quick Open Estimate: 1 records were found

Select Vehicle Print

Find Vehicles

Chassis MA220265 Search Show Deleted Owners

You can search on the chassis number to find the vehicle. Begin by clicking in the Chassis text box. Type in the chassis number, MA220265. Click the Search button.



OnCommand[™] Repair Management Service Estimating Home

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CATERA DL ACCOUNT (00099207) Vehicle: Customer: 4201 WINFIELD ROAD, WARRENVILLE, IL 60555 Owner: VM Engine: Status: Quick Open Estimate: 1 records were found

Select Vehicle Print

Find Vehicles

Chassis MA220265 Search Show Deleted Owners

Description	VIN	Owner	Unit No
MA220265	3FEN0250MA220265	Gary's Trucking	1122

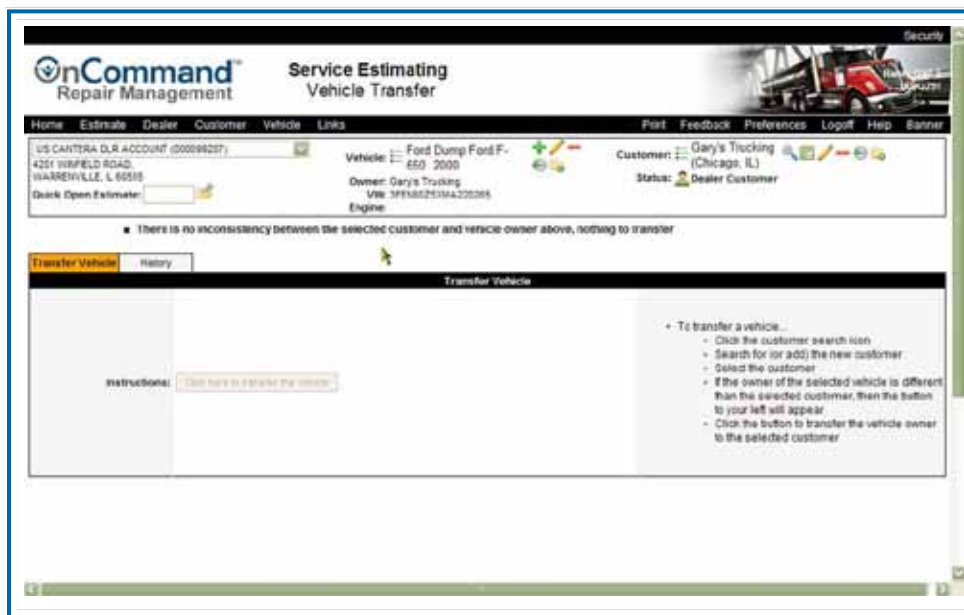
Click the Description link for this chassis number.

LESSON 13: TRANSFERRING A TRUCK



The New Estimate screen is populated with the vehicle's information and the previous owner. To transfer the vehicle, begin by clicking on Vehicle in the menu bar. Click on Transfer Vehicle.

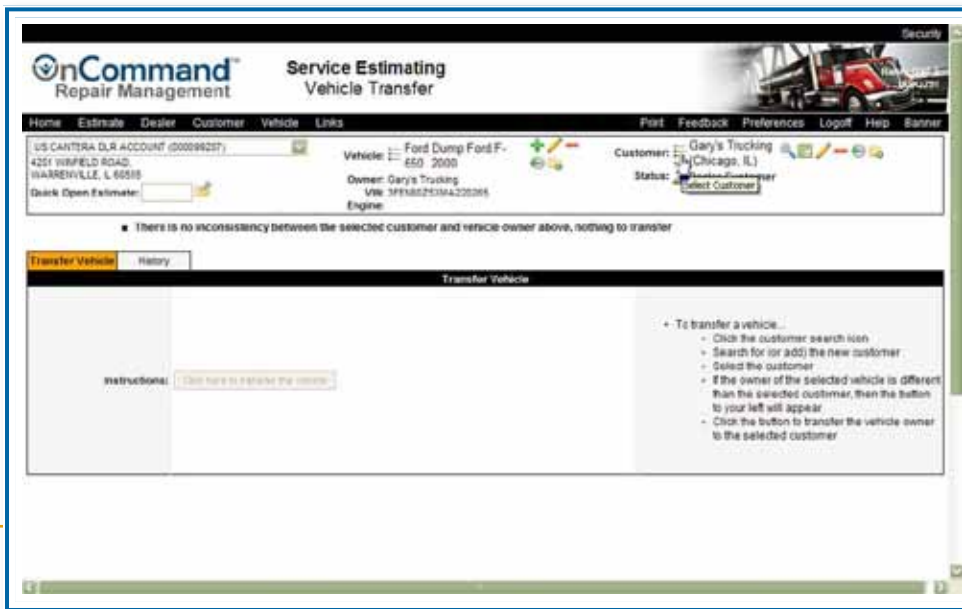
LESSON 13: TRANSFERRING A TRUCK



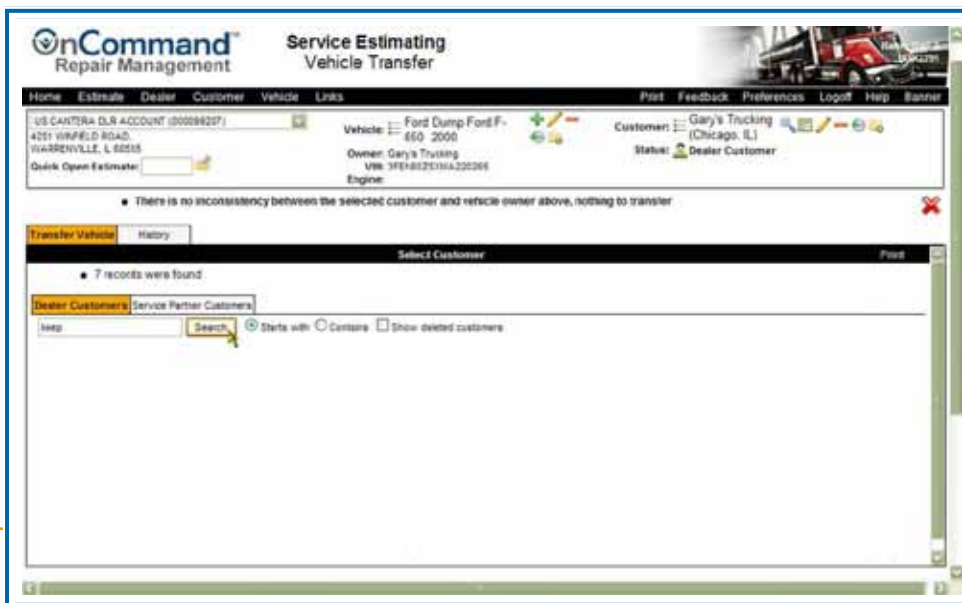
A message appears stating that there is no inconsistency between the selected customer and the vehicle owner – nothing to transfer.

Remember, at this moment, the system sees the vehicle and customer as belonging together.

LESSON 13: TRANSFERRING A TRUCK



The next step is to select the new owner, Keep on Trucking. Click on the Customer List icon.



Begin by clicking in the Search text box. Type the first few letters of the customer name, Keep. Click the Search button.

LESSON 13: TRANSFERRING A TRUCK

OnCommand[™] Repair Management

Service Estimating Vehicle Transfer

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CANTERA D/R ACCOUNT (00089257) Vehicle: Ford Dump Ford F-450 2006 Customer: Gary's Trucking (Chicago, IL)
 4201 WARFIELD ROAD, WARRENVILLE, IL 60555 Owner: Gary's Trucking Status: Dealer Customer
 VIN: 3FE16025XMAJ26265 Engine:

Quick Open Estimate: []

There is no inconsistency between the selected customer and vehicle owner above, nothing to transfer

Transfer Vehicle History

1 records were found

Dealer Customers Service Partner Customers

Keep Search Starts with Contains Show deleted customers Remove Customer

Name	Company	Deleted
Keep on Trucking	Keep on Trucking	N

Click on the new owner, Keep on Trucking.

OnCommand[™] Repair Management

Service Estimating Vehicle Transfer

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CANTERA D/R ACCOUNT (00089257) Vehicle: Ford Dump Ford F-450 2006 Customer: Keep On Trucking (Warrenville, IL)
 4201 WARFIELD ROAD, WARRENVILLE, IL 60555 Owner: Gary's Trucking Status: Dealer Customer
 VIN: 3FE16025XMAJ26265 Engine:

Quick Open Estimate: []

The currently selected customer does not match the vehicle owner
 Click the transfer button to transfer vehicle 3FE16025XMAJ26265 to customer Keep on Trucking

Transfer Vehicle History

Instructions: Click here to transfer the vehicle

- To transfer a vehicle...
 - Click the customer search icon
 - Search for (or add) the new customer
 - Select the customer
 - If the owner of the selected vehicle is different than the selected customer, then the button to your left will appear
 - Click the button to transfer the vehicle owner to the selected customer

A warning message appears stating that the currently selected customer does not match the vehicle owner. Click the Click here to transfer the vehicle button.

LESSON 13: TRANSFERRING A TRUCK

nCommand Repair Management Service Estimating Vehicle Transfer

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CANTERA DLR ACCOUNT (000896207) 4201 WINFIELD ROAD, WARRENVILLE, IL 60555 Quick Open Estimate: []

Vehicle: Ford Dump Ford F-650 2000 Owner: Keep on Trucking VIN: 3FENJ25316A226265 Engine: []

Customer: Keep On Trucking (Warrenville, IL) Status: Dealer Customer

There is no inconsistency between the selected customer and vehicle owner above, nothing to transfer.

The vehicle was transferred to the customer shown above.

Transfer Vehicle History

Instructions: [Click here to transfer the vehicle]

- To transfer a vehicle...
 - Click the Customer search icon
 - Search for (or add) the new customer
 - Select the customer
 - If the owner of the selected vehicle is different than the selected customer, then the button to your left will appear
 - Click the button to transfer the vehicle owner to the selected customer

Now you see a message indicating the vehicle has been transferred. Click the New Estimate button to proceed.

nCommand Repair Management Service Estimating New Estimate

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CANTERA DLR ACCOUNT (000896207) 4201 WINFIELD ROAD, WARRENVILLE, IL 60555 Quick Open Estimate: []

Vehicle: Ford Dump Ford F-650 2000 Owner: Keep on Trucking VIN: 3FENJ25316A226265 Engine: []

Customer: Keep On Trucking (Warrenville, IL) Status: Dealer Customer

New Estimate

Current Complaint: []

* Customer complaint must be at least 25 characters

Save Cancel

Here you are at the New Estimate screen ready to enter your customer's complaint.

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

LESSON 14: FINDING AN ESTIMATE

In the following simulations, you'll practice searching for an estimate. The approach you take depends on the information you have.

- If you only know the customer's name, you would select the customer and look through the list of past estimates.
- If you only know partial information about the estimate, such as approximately when the estimate was created or the chassis number or who it was assigned to, you would use the Find Estimate feature.

Searching by Customer

The screenshot shows the nCommand Repair Management interface. At the top, there's a navigation bar with 'Home', 'Estimate', 'Dealer', 'Customer', 'Vehicle', and 'Links'. Below this, there's a search bar with the text 'CANTERA VS DLR TEST ACCT (80099000)'. To the right of the search bar, there's a 'Find' button. Below the search bar, there's a 'Select Customer' button. The main content area shows a table with two records. The first record is for a 2006 Honda SBA 4X2, and the second is for a 2002 Honda SBA 4X2. Both records are assigned to 'Hahn, Gal S.' and have a date of '2010-07-24'. The table has columns for 'Estimate ID', 'Account', 'Total', 'Vehicle', 'Unit', 'Customer', 'Status', 'Assigned', and 'Created'. Below the table, there are several links: 'Edit Vehicle', 'Create New Estimate For Customer', 'Create New Estimate For Vehicle', 'Requires Test post (or closure)', 'Customer type is dealer customer', 'Customer type is service partner', 'No dealer customer access in that account', and 'Unread floor note present'.

Estimate ID	Account	Total	Vehicle	Unit	Customer	Status	Assigned	Created
16704	80099-000	\$275.22	2006 - 8100 - 8100 SBA 4X2 - HT330 100HP/315HP PEAK 2200 GCV - 1J021A35		Get Y Done	Working	Hahn, Gal S.	2010-07-24
16703	80099-000	\$0.00	2002 - 4300 - 4300 SBA 4X2 - DT466 ST 230 H&Q37HP PEAK 2600 GCV - 2H542704		Get Y Done	Working	Hahn, Gal S.	2010-07-24

The only available information is the customer name, AAA Transport. Begin by clicking on the Customer List icon.

LESSON 14: FINDING AN ESTIMATE



- Now search for AAA Transport. Begin by clicking in the Search text box. Type the first few letters of the customer name in the Search text box, AA. Click the Search button.



- To view the past estimates for this customer, click on the Past Estimates icon at the end of the row.

LESSON 14: FINDING AN ESTIMATE

OnCommand Repair Management Service Estimating View Estimates

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

CANTERA 35 DLR TEST ACCT(0000000000)
4211 VANFELD RD
DUNNELLVILLE, IL 60055

Quick Open Estimate:

73 records were found

Estimates for customer: AAA TRUCKING (for past 12 months)

Estimate (ID)	Assessed	Total	Vehicle	Job	Customer	Status	Assigned	Changed
18704	\$00099-000	\$275.22	2006 - 8500 - 8500 SBA 4X2 - H7530 350HP/311HP PEAK 2200 GOV - 1J620430		Get Y Done	Working	Hahn, Gal S	2010-07-29
18793	\$00099-000	\$0.00	2002 - 4300 - 4300 SBA 4X2 - DT466 ST 230 HP/237HP PEAK 2000 GOV - 2M542704		Get Y Done	Working	Hahn, Gal S	2010-07-29
18224	\$00099-000	\$83.60	2005 - 4200 - 4200 SBA 4X2 - V7385 300HP/200HP PEAK 2000 GOV - 9M91752		Get Y Done	Closed	Manuel Schuurman	2010-07-20
13618	\$00099-000	\$0.00	2005 - 4200 - 4200 SBA 4X2 - V7385 300HP/200HP PEAK 2000 GOV - 9M91752		Get Y Done	Closed	Manuel Schuurman	2010-07-20
11589	\$00099-000	\$0.00	2006 - CF80 - CF800 4X2 - VT175 V6 4.5L 200 HP/2 2700RPM - 6L462172	678	Get Y Done	Closed	Manuel Schuurman	2010-07-20
13082	\$00099-000	\$108.68	2005 - 4700 - 4700 4X2 - RT ELECT T444E DOL 1750HP/230000RPM 1YK324787		Get Y Done	Closed	Manuel Schuurman	2010-07-20
			2005 - 4700 - 4700 4X2 - RT ELECT T444E DOL				Manuel	

A list of estimates for the last 12 months appears. The estimate you want is 18224. It's further down the list. Click in the scroll bar to scroll down.

- Click on the Estimate number, 18224.

LESSON 14: FINDING AN ESTIMATE

nCommand Repair Management Service Estimating Estimate

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

Vehicle: 4300 (P) 432 7000 Owner: AAA Trucking Customer: Gal W. Clark
 4211 WAPLE RD. VIN: DHTMMAAG0H542704 Status: Dealer Customer
 ELKHARTVILLE, IL 60055
 Quick Open Estimate: [button]

Engine: DT466 ST 230 HRC37HP PEAK 2600
 QDY1338355

Estimate # 18224 Created: 2010-07-24 / Hahn, Gal S Assigned: Hahn, Gal S

Operations Print Fees Attachments E-Mail Notes Assignment ISIS

Phone: 3127731234 FAX: Make: INTERNATIONAL Year: 2002 Status: Working Close Estimate
 329 N Dearborn St., Chicago, IL 60642 Warranty Start: 2002-06-01 Unit No: Mileage: 0 Miles
 Non-Fleet Estimate Engine Ser: 4704642/1338355 DO Number: [] Save
 Recalls: []

Add Operations Add Labor Adjustment Add Parts Adjustment Add Performance PU

Other Info

Completed: Truck loses power when hot while going uphill
 In Service: In Service 8 Years 1 Month
 Series: DURASTAR SERIES MEDIUM CONVENTIONAL (4000)
 Family: MEDIUM DIESEL TRUCKS (4000)
 Application: Van (Refrigerated Van)
 Navistar equivalent:

Notes

+ 2010/07/24 11:03 (Dealer) - Hahn, Gal S - Truck loses power when hot while going uphill

Taxable Items

Parts: \$0.00
 Core Credit: \$0.00
 Labor: \$0.00
 Shop Supplies: \$0.00
 Tax: \$0.00

Non-Taxable Items

Hazardous Waste: \$0.00
 Freight: \$0.00
 Total: \$0.00

The estimate opens.
 The estimate can be
 reviewed and modified
 as needed.

LESSON 14: FINDING AN ESTIMATE

Using Find Estimate



To access the Find Estimate feature, click on Estimate in the menu bar. Click on Find Estimates.

LESSON 14: FINDING AN ESTIMATE

The screenshot displays the 'Service Estimating Search Estimates' interface. At the top, there's a header with the 'OnCommand Repair Management' logo and a 'Security' link. Below this is a navigation bar with links: Home, Estimate, Dealer, Customer, Vehicle, and Links. The main content area is divided into two sections. The top section contains a form for entering search criteria, including fields for 'Vehicle' (with a dropdown), 'Customer' (with a dropdown), 'Status' (with a dropdown), 'Owner' (with a dropdown), and 'Engine' (with a dropdown). The bottom section is titled 'Search Criteria' and contains a table with columns: From Date, To Date, ID, Estimate #, SO Number, Chassis, and Unit. The 'ID' column has a dropdown menu open, showing 'Assigned user ID' as an option. To the right of the table, there are checkboxes for 'Only account: 300099207' and 'Only customer', and a 'Range' dropdown menu.

Perhaps you want to see all estimates assigned to a particular person. Use the ID field to search on the Assigned user ID.

- Begin by clicking on the drop-down arrow after ID to open the list of options. Click on Assigned user ID in the drop-down list.

LESSON 14: FINDING AN ESTIMATE

The screenshot shows the 'Service Estimating Search Estimates' page in the OnCommand Repair Management system. The page has a navigation bar with links: Home, Estimate, Dealer, Customer, Vehicle, Links, Part, Feedback, Preferences, Logout, Help, and Banner. Below the navigation bar, there are input fields for 'Vehicle' (US CANTERA DLR ACCOUNT (000099207)), 'Owner' (V8), and 'Engine'. There is also a 'Quick Open Estimate' button. Below these fields, there is a 'Search Criteria' section with 'From Date' (7/25/2015) and 'To Date' (8/31/2015). The 'Assigned user ID' field contains 'U00SXX6'. There are checkboxes for 'Include Closed Estimates' and 'Only account: 000099207'. A 'Search' button is highlighted with a yellow cursor.

Type in the person's user ID.

- Begin by clicking in the text box underneath it. Type the ID number, U00SXX6. Click the Search button.

LESSON 14: FINDING AN ESTIMATE

OnCommand Repair Management Service Estimating Search Estimates

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CANTERA DLR ACCOUNT (000099207) Vehicle: Owner: Status: Customer: VW2XXX

4251 WIRFIELD ROAD, WARRENVILLE, IL 60558

Quick Open Estimate: [button]

23 records were found

Search Criteria

From Date: 7/25/2015 To Date: 8/31/2015 Assigned user: VW2XXX Scope: Only account: 30009207

Include Closed Estimates Search Cancel

Estimate (HQ)	Account	Total	Vehicle	Unit	Customer	Status	Assigned	Changed
30311-2	000099-207	\$408.12	2003 - 4300 - 4300 SBA 4X2 - DT400 ST 215HP225HP PEAK 2600 GOV - 3M572303	2NT 20	NAVISTAR FLEET / Location 2	Working	Steve Kusler	2010-08-24
21378-0	000099-207	\$0.00	2004 - 4300 - 4300 SBA 4X2 - DT400 ST 230 HP237HP PEAK 2600 GOV - AM80140	2244	Jasper Engines & Transmissions Jasper-30	Hold (auto)	Steve Kusler	2010-08-23
30621-0	000099-207	\$0.00	2009 - PROPR - PROSTAR PREMIUM 6X4 - MAXXFORCE 13 430HP1900 GOV - 9C162230		Deekase / 35000	Hold (auto)	Steve Kusler	2010-08-23
29681	000099-207	\$1643.00	2004 - 4200 - 4200 SBA 4X2 - VT305 200HP200HP PEAK	2019 Trail		Working	Steve Kusler	2010-05-19

Select the desired estimate from the list by clicking the Estimate link. Click on 30311-2.

OnCommand Repair Management Service Estimating Estimate

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logout Help Banner

US CANTERA DLR ACCOUNT (000099207) Vehicle: 4300 SBA 4X2 2003 Owner: NAVISTAR FLEET / Location 2 Customer: Navistar Fleet Location 2 (Downers Grove, IL) Status: Fleet Customer

4251 WIRFIELD ROAD, WARRENVILLE, IL 60558

Quick Open Estimate: [button]

DT400 ST 215HP225HP PEAK 2600 GOV120000

Estimate #30311 Created: 2010-08-24 / Marcel Schaeffer Assigned: Steve Kusler

Operations Print Parts Catalog Fees Attachments E-Mail Notes Assignment Fleet Downloads IRS

Phone: DATE: Make: INTERNATIONAL Year: 2003 Status: Working Close Estimate

1500 GPS PLACE, 2ND FLOOR, DOWNERS GROVE, IL 60515

Warranty Start: 2003-11-08 Unit No: UNIT 20 Mileage: 0 Title

Engine Ser: 470H-HQV1366800 RO Number: Save

Recall A/C: [button]

Add Operations Add Labor Adjustment Add Parts Adjustment Add Performance P/R

Info	Operation	Described	Warranty	Labor	Parts	Core	Total
X	Rear Axle REAR WHEEL HUB OIL SEAL REPLACE A14-181 Models, ALL All Models, Calber Dec Brake, One Wheel (1.4hr + 30% + 1.0hr)			\$180.50	\$28.61	\$0.00	\$209.11
X	Performance PM Quick Lube A15-Heavy 1			\$0.00	\$0.00	\$0.00	\$0.00

Other Info

Comments: Customer complains of the left rear wheel seal leaking

In Service: In Service 7 Years 9 Months

Series: DURASTAR SERIES MEDIUM CONVENTIONAL (4000)

Family: MEDIUM DIESEL TRUCKS (4300)

Application: Van (Dry Van)

Taxable Items

Parts	Core	Labor
\$209.11	\$0.00	\$180.50

The estimate opens. The estimate can now be reviewed and modified as needed.

NOTES

This image shows a full page of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page, typical of notebook paper. There are no margins, text, or other markings on the page.

SUMMARY

In this program, you have practiced dealer administration and estimating tasks

As a Dealer Administrator, you practiced how to:

- Manage your dealer information
- Manage dealer-specific parts
- Add a custom labor operation
- Add a special customer labor rate
- Mass-edit customer estimating information
- Run a report

In your role as Service Advisor, you practiced a number of estimate-related tasks, including how to:

- Add a new customer
- Add a new service contact
- Create an estimate for an International truck
- Add a non-International truck
- Transfer trucks
- Search by customer to find and estimate
- Use the Find Estimate feature

NOTES

[illegible]

This image shows a full page of blank white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page, providing a template for writing or drawing. There are no margins, text, or other markings present.

Repair Management