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

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.

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

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- 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.

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.

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

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			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.



Incommand Repair Management	Service Estimating Dealer Profile Maintenance
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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.

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- 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.

NOTES

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.

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815-	ARM REST Vendor	66.51	10	38.58	42.00	41.04	1.10	×	0.00	1	Dee

• 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.

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- 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.

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010-	ARU REST Vendur	66.31	47.45	36.55	45.00	41.04			0.50	1	Dente

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

NOTES

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.

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

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* 08 - Electrical	
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= 10 - Direct Reading Gauges	
= 11 - Cutch	
# 12-Engine	
# 13 - Transmission	
# 14 - Rear Azle	
w. 15 - Fuel Systems	
# 16-Cab	
m 17 - Witweets	
# 19 - Heat, A/C, Wipers, Seats	
# 20 - Miscellaneous Repairs	

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

	Repair Management Service Estimating Labor Operations Maintenance Home Estimate Could Recovery Vehicle Links Us CANTERA CUR ACCOUNT (B00090207) Variation Recovery Vehicle Links Us CANTERA CUR ACCOUNT (B00090207) Variation Recovery Vehicle Links Us CANTERA CUR ACCOUNT (B00090207) Variation Recovery Vehicle Links Us CANTERA CUR ACCOUNT (B00090207) Variation Recovery Vehicle Links Outex Open Latimate:	Print Feedback Preferences Logof Hep Banner
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NAVISTAR GROUPS © 01 - Frame Bumper © 02 - Front Axle		Al-Dealer Custom Operation R Service Partner Laber Time
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65 - Steering 66 - Prop Shaft 67 - Exhaust Systems		
08 - Electrical 09 - Cooling 10 - Direct Reading Gauges		
11 - Clutch 12 - Engine		D

To add an operation, click the Add New button.

Home Estimate Dealer Customer	Vehicle Links Print Feedback Preferences Logoff Help Ba
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	Add/Edit Operation
Component Group:	O4-Brake O Add New Group
Operation Name:	Front Asle Wheel Pul
Variable Time : O Fixed Operation Price : ® Fixed Parts/Labor Price : O Fixed Labor Time : O	Operation Fixed Price: 10 Tax included: Yes 🔛
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 Vasionments for Describer
	New Assignment Variation

• 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.

Repair Management	Servic Add	e Estimatir Edit Operat	tion					
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• To set the related operations for this custom operation, click the Set Related Operations button.

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Image: Reference National RAVISTAN GROUPS Generation Burner Image: Generation Burner Image: <td c<="" td=""><td>Relation Time KCZ</td><td>Apply Markup</td><td>Service Partner Later Tire</td><td></td></td>	<td>Relation Time KCZ</td> <td>Apply Markup</td> <td>Service Partner Later Tire</td> <td></td>	Relation Time KCZ	Apply Markup	Service Partner Later Tire	

 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.



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.



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.



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

ione Estimate Dealer	Gustamer Vehicle Links		Piet Fee	edback Preferences Logoff Heip
US CANTIRA BITERNAL ACCTUDO 201 WRITELD ROAD. NARRINVELE, L 60515 Nack Open Estimate:	encinz) 🖸			
elect Related Operation for F	Labor Operations Man Front Axia Where Pull	tenance-		
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a 81 Frama@umpor a 82 - Front Asle	KAVITSAR GROUPS			Service Partner Labor Time
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# 01 - Frame Gumper # 42 - Front Axle # 63 - Springs tustgemblo # 64 - Grake # 465 CONTRI # 465 CONTRI # 465 LECTR # 465 LEC	Coperation Nume Coperation Nume Coperation Nume Concection Replace One control, Notice Assessed, V. H & R AND/OR REPLACE One control, INIT (FULL POWER BRARES), REPLACE One control, INIT (FULL POWER BRARES), REPLACE INID, REPLACE INID, REPLACE ULC CONTROL INIT (FOUL POWER BRARES), REPLACE ULC CONTROL INIT (FOUL) PULL POWER BRARES, REPLACE ULC CONTROL INIT (FOUL) PULL POWER BRARES, REPLACE	Salahed	Apply Marsup	Carden Cuetor Doewlen

Click the Return button.

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O have been been						
Sob addition road Price	AddEd	t Operation				
Component Group: 0+ 6/sis		2				
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(Seve) (C	ncer New Copy 0	peration Delete	Set Related Operat			
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		and Warman.				
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	Command Repair Management	Service Estimating View Parts For Operation/Assignment	
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	US CANTIRA OLR ACCOUNT (800099207) 4201 WINFELD ROAD, WINARRYLLE, L. 6055 Quick Open Estimate:	8	
		Operation Name: Wheel Pull - \$80 per axle / Assignment/Variation	C DEFAULT
		Add Par(s) Return	
If there were any			
parts currently			
assigned to this			
operation, they			
would be listed			
here. Click on the		Copyright 2010 Navistar, Inc.	
Add Parts button.	4		Ð

Repair	Management	Add Part(s) to Operation/Varia	tion	and a bar
Home Estima	te Dealer Customer V	ehide Links	Print Feedback Pr	eferences Logoff Heip Bann
4201 WINFELD RO	ACCOUNT (000099207)	w.		
WARRENVILLE, L. Quick Open Estin	60555			
Name and Andrew Design	alas Darta			
Navatar Parta	aler Paris	Sauch Fritaria		
1	Component Group: 04-Brake		Keywords:	
		Search Parts By Keywords	Return	
		4		

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

				To atta	
Home Estimate Dealer Customer Ve	Nde Leks		Print Feedback	Preferences Log	of Hep
ACTS WREELD RDAD. MARREWILLE, L 60515		-			-
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		- 12			

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

Re	epair Managen	nent Add Pa	rt(s) to Operation/Va	ariation	2	
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dar P	l <mark>eta.</mark> Deslei Parts		Search Criter	19		
	Component Gro	up: 24-Brate	<u>u</u>		Keywords:	
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	04-7500-	BHOE; BANKES				
9	04-7800-001	SHOE, BRAKE WILKING FROM	ť.			
	04-7800-002	SHOE, BRAKE WOS LINING FR	RONT			
	04-7200-003	SHOE, BRAKE VILINING REAR				
	04-7800-004	SHOE, BRAKE INOS UNING R	LAR .			
0	34-7800-005	SHOP, BRAKE LUNING				
	04-7100-005	SHOE, HAND BRAKE				
	04-7900-007	SHOE, HAND BRAKE LILINING				
	A	SHOE BAK HARD CONT VALV	ŧ.			
	94-7300-008					1.0
	94-7300-000	SHOE, DISC BRAKE				

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

Click the Add Selected PTC(s) button.

	pair Managen	nent Add	Part(s) to Operation/V	ariation	ALL	22
che .	Estimate Dealer	Sustamer Vehicle Links	\$	Pat	Feedback Preferences Logott Heip	ßan
ET WIN	PELD RDAD. VELE, L 60515	anti vi				
	· FTCs added	d successfully.				
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inter P	wite Dealer Parts					
			Search Criter	fia		
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4461	Selected PTC(a)			4	14.4	1.10
1	Bumber.			Name		- 11
		many manufit				
	04-7300-	and the second second second				
	04-7900-001	SHOE, BRAKE WILKING P	FRONT			
	04-7900-001 04-7900-002	SHOE, BRAKE WURING F SHOE, BRAKE WOS LAW	rikont va fikont			
	04-7800-001 04-7800-002 04-7800-002 04-7800-003	SHOE, BRAKE WILDING P SHOE, BRAKE WICS LIVIN SHOE, BRAKE WICS LIVIN	RONT NG FRONT REAR			
0.0000	04-7900-001 04-7900-002 04-7900-003 04-7900-003 04-7900-004	SHOE, BRAKE WILLIAMO F SHOE, BRAKE VICOS LIAM SHOE, BRAKE VICOS LIAM SHOE, BRAKE VICOS LIAM	rront Ng Pront Rear Ng Rear			
000000	04-7500- 04-7500-001 04-7500-002 04-7500-003 04-7500-004 34-7500-004	SHOE, BRAKE WILTING F SHOE, BRAKE WILTING F SHOE, BRAKE WILTING F SHOE, BRAKE WILTING F SHOE, BRAKE ULTING	RONT NG FRONT REAR NG REAR			
0000000	04-7500- 04-7500-001 04-7500-002 04-7500-003 04-7500-004 34-7500-005 04-7500-005	SHOE, BRAKE WURKED F SHOE, BRAKE WOS LAW SHOE, BRAKE WOS LAW SHOE, BRAKE WOS LAW SHOE, BRAKE ULINING SHOE, REAKE LLINING SHOE, HAND BRAKE	IRONT NG FRONT REAR NG REAR			
00000000	04-7300- 04-7300-001 04-7300-002 04-7800-003 04-7800-004 04-7300-005 04-7300-005 04-7300-005	SHOE, BRAKE WILMED J SHOE, BRAKE WOS LAN SHOE, BRAKE WILMED J SHOE, BRAKE WOL LAN SHOE, BRAKE LUNNE SHOE, HAND BRAKE LUN	NRONT NG FRONT REAR NG REAR			
000000000	04-7300- 04-7300-001 04-7300-002 04-7300-003 04-7300-004 04-7300-005 04-7300-005 04-7300-007 04-7300-008	SHOE BRAKE WILHING H SHOE BRAKE WILHING S SHOE BRAKE WILHING S SHOE BRAKE WILHING S SHOE BRAKE WILHING SHOE SHOE HAND STAKE LLA SHOE BRAK HAND STAKE LLA	IRONT NG FRONT REAR ISIN REAR NING VALUE			

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

And Paul S. Le 60355 Open Estimate: Coperation Name: Front Aule Wheel Pull / AssignmentWariston: DEFAULY Parts Part Cd I Part Type Cd Bane Gir Cd Action Parts 04 - 7800-001 SHOE, SRAKE WURING / RONT Cateboo Add Parts) Return	NTIRA NTERS	NNL ACCT(000099212)	, n	nt Feedback Prefere	ences Logoff	Help Ba
Open Estimate:	INVELD ROAD). 555				
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Parts Part Cd I Part Type Cd Name Str Edit Action P 04 - 7800-001 SHOE, SRAKE WULSING FRONT Calify Calify		Operation	Name: Front Jude Wheel Pull / AssignmentVariation: DEI	AULT		1 . h
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Add Parr(s) Beturn	1	04 -7800-001	SHOE, BRAKE WILLING FRONT	- Ser	ton	Delete
			And Partial Deturn			_

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

Repair Management		Add/E	dit Opera	tion				In-	al a
iome Estimate Dealer Customer	Vehicle	Links				Print F	redback Pres	prences.	Logoff Heip Banner
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				14 AU - + - CVA	1912				

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

NOTES

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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.

one Estim	ate Dealer	Customer Vi	ibide	1	inks				P	int Feedback Pr	eterences Log	off Help B	ann
S CANTIRA D. SI WRFELD R ARRENVELE, L ark Open Esti	R A Dealer Info Date Dates Task 601 Labor Rate mat ShopMisc R	Maintenance Aaintenance Maintenance Fee Maintenanci Io	-	No.	Vehicle: E Dwnec VII: tingive:			0	Sta	mant E 🤇 🕈 Alas			
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Please hover over Dealer in the menu bar. Click on Labor Source Maintenance.

LESSON 5: ADDING A LABOR SOURCE

Repair Man	agement Service Estir Labor Sour	nating ce Maintenance	1		
me Estimate De	aler Customer Vehicle Links	Post Feedba	ck Preferences	Logoff H	teip Banne
S CANTIRA D.R ACCOUR SI WAYELD ROAD ARRENVELE L 60515 Jack Open Estimate:	rf (50094017)				
. 121	scords were found			N 4	123 P P
Inte	Sette: Webnan Cartage	Description	Labor Rate 0.00	Edit +	Delete
Fleet / Service Partner	_ALLEGELDG_LABOR_RATE	Alled Building Products and Subasilarias Field Pricing Source	75.00	1	Delite
Feet/Service Farther	_MERNER_LABOR_RATE	Garage Wilabetchcuail Fleet Pricing Source	80.00	1	Deure
Peet/Service Partier	_BLOTRICK_LABOR_RATE	BLS Trucking Peet Pricing Source	0.00	1	Danita
Paret / Bervice Partner	BLIEBEL LABOR RATE	Rise Bel Creameres Feet Proing Source	0.00	1	Dente
Fleet / Bervice Partner	_BOUTH_LABOR_RATE	Boule express Feet Pricing Source	0.00	1	Delate
Peet / Service Partner	_BRINKSCANADA_LABOR_RATE	Britis Carada Peet Prong Source	0.00	1	Dente
Fleet / Service Remer	_BLOOST_LABOR_BATE	Budget Truck Rental Plant Pricing Source	0.00	1	Calife
Pleat / Service Partiel	_CALARK_LABOR,RATE	Cal Ark Past Priling Source	0.00	1	Dates.
Peet clervice Partiel	_CARDRAL_LABOR_RATE	Cardinal Legistics Management Caroanation Fleet Pricing Bource	0.00	1	Dehle
Peet / Service Parlier	OHEEBENAN_LABOR_RATE	Chevennen LLC Parel Pricing Bowrite	0.00	1	Dents
First / Service Partner	_DIMAALANCR_AATE	Dorbar Amount Field Pricing Source	0.00	1	Determ
Past / Service Partner	_DUROOMR_LABOR_RATE	Durocher International Fleet Pricing Source	0.00	1	Dente
	Companying a company of the	Entertaine Floot Design Taxana	76.00	1	Canada
Fleet./Service Partner	_EVTERPRISE_LABOR_RATE	Eventual and serviced service.	19.44		1.40.000

• 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

Repair Man	agement Service Estin	mating ce Maintenance			
me Estimate De	aler Customer Vehicle Links	Prist Feedba	ck Preferences	Logoff H	leip Banni
S CANTIRA DLR ACCOUR SI WHITELD ROAD ARRENVELE, L 60515 atk Open Estimate:	(100094017)				
• f2 f	cords were found			14 4	123 P P
Tune	Bitte	Description	Labor Rate	Edit	Delete
Fleet / Service Partner	_ALLECOLDG_LABOR_RATE	Adult Deliving Products and Subsidiaries Past Pricing Source	75.00	2	Delute
Feet/Service Farther	_MERNER_LABOR_BATE	Garage Milabetshouan Fleet Pricing Source	80.00	1	Deure
Peet/Dervice Partier	_BLOTRICK_LABOR_RATE	BLS Trucking Peet Pricing Sources	0.00	1	Dente
Peet / Bervice Partner	_BLIEBRIL_LABOR_RATE	Rise Bel Creameres Feet Proing Source	0.00	1	Dente
Fleet / Bervice Partner	_BOUTH_LABOR_RATE	Buule express Firet Pricing Source	0.06	1	Deline
Peet/Service Partner	_BRINKSCANADA_LABOR_RATE	Britis Carada Paet Prong Source	0.05	1	Dente
Fleet / Service Remier	_BLOOET_LABOR_BATE	Budget Truck Rental Paet Pricing Source	0.00	1	Dalafa
Pleat/Service Partiel	_CALARK_LABOR_RATE	Call Ark Part Priving Source	0.00	1	Dates.
Peet Chervice Parties	_CARDINAL_LABOR_RATE	Cardinal Lightles Management Caroanalium Fleet Pricing Bource	0.00	1	Dehler
Peet Service Partner	_OHESENAN_LABOR,RATE	Cheeseman LLC Parel Pricing Source	0.00	1	Dehts
Field / Service Partner	_DINAAR_JAADR,AATE	Donter Arminet Field Pricing Source	0.00	1	Determ
Flast / Service Partner	_DUROOMR_LABOR_RATE	Durocher International Paret Pricing Source	0.00	1	Dente
		Federate First State Street	74.94		Planet
Fleet./Service Partner	_EVTERPROF_LABOR_RATE	Examplants was scored nemon	19.49	1	1240444

- 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

	gentent	ee mannenance	100.000	- 21	a Cha
ome Estimate De	aler Customer Vehicle Links	Prist Feedba	ck Preferences	Logoff H	leip Bann
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Inte	Satia	Description	Labor Rate 0.00	tdit +	Delet
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Feet/Service Farther	_MERNER_LABOR_RATE	Garage Welabetchouse Fleet Prices Source	80.00	1	Deure
Peet/Dervice Partier	_BLOTRICK_LABOR_RATE	BLS Trucking Peet Pricing Sources	0.00	1	Cente
Palat / Barvice Partner	BLIEBRIL_LABOR_RATE	Rise Bell Creameres Feet Proing Source	0.00	1	Dentes
fleet / Bervice Partner	_BOUTH_LABOR_RATE	Buule express Feet Pricing Source	0.06	1	Delute
Peet/Service Partner	_BRIKSCANADA_LABOR_RATE	Britis Carada Paet Prong Source	0.00	1	Dente
Fleet / Service Rather	_BLOGET_LABOR_BATE	Budget Truck Rental Flant Pricing Source	0.00	1	Dalife
Peet/Service Partiel	_CALARK_LABON_RATE	Call Ark Part Priving Deuroe	0.00	1	Dates.
feet (bevice Partie)	_CARONAL_LABOR_RATE	Cardinal Ligados Management Caroanatus Fleet Provo Source	0.00	1	Print
Peet / Service Parlier	OHESTRAN_LABOR_RATE	Chevennen LLC Parel Pricing Bourse	0.00	1	Dents
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Fiest / Service Partner	_DUROOUR_LABOR_RATE	Durocher International Fleet Pricing Source	0.00	1	Dente
	Automatical Longer Born	Partness of Frank Designed Transmo			(Concess)

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

ne Estimate De	aler Customer Vehicle Links	Pret Feedb	ack Preferences	Logoff I	Heip Bann
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Dealer	Kin Rogers Test labor Rate	Kim test lator rate	50.00	/	Deiste
Depler	Matterns Trocking	Special pricing	50.00	1	Quinte
Dealer	Stevera special adur nee	Use only in Steve's Cartage	56.95	1	Delete
Dealer	Test abor source for Admin Training	Adres Training	25.00	1	Datate
Dealer	Testing laker anurse	Testanly	40.00	1	Deitite
Dealer	Traier Lator Raie	Traiter latur rate	35.00	1	Delate
a second lite	Manhaman Waldarin	Structure Floor House	Tint	-	Dalata

• Here is the record for Wellman Cartage that you added.

NOTES

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.

ome Estimat	te Desier C	ustomer Ve	bide	Links					Ps	it Fredback P	references. Log	off Heip Bi	anner
US CANTIRA D.R 1251 WRFELD RD NARRENVELS, L 2448 Open Estin	Dealer Info M ap Deles Tas Ma Cabor Rate M Ist ShopMisc Fe Upload Logo	airlenarce intenance laintenance le Maintenance	-		ehicle: E Webc: VBc ngeve:			6	Sta	sen⊟ ¶.∲ Nac			
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22125	8000W9-257	\$0.00	4	2008 6.80 ^o 17540 1950	4700 - 4708 4X2 - 8/7 17444 DEL IQ230500RPM - (787	10		AAA Transport	-	manag 🔛	Halm, Gail S.	2012-06-18	4
22123	000099-207	\$0.00	2	2000 ELECT 175wl 175wl	4700 - 4708 Ki2 - 8/7 1944E DSL 02200500RM - 4797	-0		AAA Transpot	-0	Warting 🔛	Pater, Gal S	2210-48-18	ш
28212	000099-207	50.00	2	2007 CE SI 21040	CS8 - NTEGRATED NUS - 27466 10600 GOV -		815	AAA Transport	ta.	Warting 🔯	Patri, Gal S	2010-48-17	W

Please hover over Dealer in the menu bar. Click on Customer Estimating Information.

	Repair Management	Customer Estin	mating Information	
s Open Externation Select Customer Construct & Const	ESTERIO ESTOR OCTOBRE ANTERA DUR ACCOUNT DESCRIPTION INVERTOR CALC REVALL & VESSE	Vehicle Links	Customer Status	Feedback Preferences Logoff Help Baar E 🔍 🔶
Select Customer	LA Open Extimate: 🥂			
Address Address Data Later Printy Searce Part Prices Searce Customer Frei Charge (C): Tae exempt	 Select Customer 			
Adoreal Data Lation Process Searce Part Pricess Searce Customer Res Charge (C): Tas exempt:		Car	stomer Estimating Information	
Data		Adoress		
Latter Printing Searces Part Priceting Searces Customer Press Charges (Circle Tail excernpt)		CRAS-		
Customer Revit Charge (Chite)	Labor Printeg	g Source:		Mana-sellisma.ma.gcal
Tas exempt [Part Prices	0 Souther		12
Sare Feat	Contemp ress, Cra	exemple [1]		
	1.00	exempt [1]	The Part I	
			Contraction of the second s	
	_			
	2			

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

	Service Estimating Customer Estimating Information	Steam
Ionie Estinatie Dester Gustomer 1 us CANTERA DLR ACCOUNT (00009207) 201 WWWELD BOAD, VARRENVILLE, L 60555 Aude Open Estimate:	Vehide Links	Print Freedback Preferences Logoff Heip Banner Customen 📄 🔍 💠 Status:
	Ennrch Fritaria	
Name: a Labor Pricing: Show deleted customers:	DMI: Part Pricing	Customer Fleet Charge (): Tas exempt:
	Search Reset	

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

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

Command Repair Management	Service I Custon	Estimating her Estimatio	g Information		1		10	
forme Estimate Dealer Customer	Vehicle Links			Part Fe	sdback Pre	ferences L	ogoff He	ip Banne
US CANTIRA D.R. ACCOUNT (D00090257) 4251 WINFELD BOAD, MARRINISLE, L. 60515 Duink Open Estimate:				Clustomen E Status:	4.4			
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Blog deletes sectores [7]			and [Brid]					
							14	
Customer	2013	Customer Fleet Cheran	Earl Pricing	Labor Prising	flate	Exernet	£R.	Deleted
A and K. Trucking Incorporated	1		Retai	1	0.00	- 5	1	N.
A BEALMONT TRANSPORT INC.			Retail		0.00		1	. 10
AAA.Tramport	56348		Retail	Internal Latter Rate (60.50)	65.00	1¥.	de	
HE INDEX HUTS			Retail		8.00		¥	N.
ABEOT FOODS INC			Retail		8.00		1	
Abtox Fand Services			Relati		0.00		1	
ABC Co			Retail	Steve's special labor rate	90.00	CW C	1	
					10.00			
ABC Co			Retail		6.00	. 16	1	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.



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.



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

	Command Repair Management	Service E Custom	stimating er Estimatin	g Information		1		1	
	Home Estimate Dealer Customer	Vehide Links			Part Fe	edback Pre	forences L	logat H	ep Bann
	US CANTERA D.R. ACCOUNT (D00090257) 4201 WARFELD ROAD, WARFEWILLE, L. 60515 Guide Open Extimate:				Clustomen E Status:	4			
	 Update completed 								
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			.5	ach Read					
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	Customer	0413	Customer Dent Checan	Eart Pokins	Labor Pricing	Rate	Exernet	5.01	Deteted
	A and K Trecking incorporated			Retai	1	0.00		1	N.
	A BEAUMONT TRANSPORT INC.			Retail		0.00		1	. N
	ALL THINKS A	Mittale.		Feet charge	Ritemai Later Rale (60.50)	85.00	. Y .	1	
	Love Traininger	101752							1.0
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The updated estimating formation for	HILLIAMIASSI HILLIAMIASSI HERCELKORDOLING Abbat Fand Services ABC-Co			Retai Retai Retai	Devris special labor	8.00 8.00 8.00 8.00	N N V	111	*

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NOTES

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.

Repair Management	Home		- Marin
ome Estimate Dealer Customer Ve	hide Links	Print Feedback Preferences Logoff	Heip Banni
of CANTRA BTER 21 WARELD BOAD Dates Tas Maintenance WAREWOLLF, LOG Labor Rate Maintenance was Open Estimat ShogAlact Fee Maintenance Upload Logo	Vehicle: Downer: Vite tingane:	Castomer: 🔚 🥄 🕈 Satur:	
My open estima Operation Maintenance	shances Beach		
Labor Source Maintenance Costorner Estimating Inte Upthart Costorner Vehicles FleetInfo			
Reputa	Estimate Usage Operations, Quoted Not Said		
	Copyright 2018 Navial	r, 800.	
	All Smax are (DHT-36.05) Cannal T	na 195 & Canada)	

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

•

Operations Queted Rot Sidd
Operations Gausted Not Stild To Date: (\$112215
To Date: \$12212
Vew Report
Vew Report

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

Sn Re	Command [*] Service Estimating pair Management Operations Not Sold Rej	Part Feedback Preferences Logot Heip Banner
US CANT 4251 VIDIO UNARESIO Guine Opt	RA D.R ACCOUNT (200092217)	
The calendar displays the previous month. To change it to back one more month, click the back arrow in the upper left corner of	Premi Date Doctori Im Control Ref Guoted For Desterators + July, 2010 + - Guoted Ry User > Ho To: We Fr - 7 20 20 1 2 - - - 10 10 10 14 10 -<	Te Beler, sonzäta

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US CANTERA DLR AC		Vehicle Links		Print Feedback Preferences	ogoff Help Banner
4201 WINPELD ROAD, WARRENVILLE, L 6051 Quick Open Estimate	COUNT (000099257)				
		Operatio	ns Queted Not Sold		
	From Date	es 7/1/2010		To Date: 9/1/2010	
	Quoted By Use	All CANTERA US DLR TIST ACCT (000096000)			
		US CANTERA DER ACCOUNT (00099212) US CANTERA NTERNAL ACCT (100099212)	2		
					2
					10
limit you	r report to	the US Cantera de	alership, begin l	by clicking the d	own arrow
limit you ter Quote	r report to d For Deal	the US Cantera de lership. Then select	alership, begin I US CANTERA I	by clicking the d	own arrow from the
limit you ter Quote	r report to d For Deal list	the US Cantera de lership. Then select	alership, begin l US CANTERA I	by clicking the de DLR ACCOUNT	own arrow from the
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limit you ter Quote op-down	r report to d For Deal list.	the US Cantera de lership. Then select	alership, begin b US CANTERA US CANTERA Service Estimatin Operations Not	by clicking the de DLR ACCOUNT	own arrow from the Ref Feedbac Preferen

Quoted By Users Al

Click the View Report button.

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Vew Report

Repair Management	perations ivot Solo	Report			Doctor.
ine Editate Dealer Customer Vehide L	1963		First Feedback	Preferences Log	poff Help Banni
IS CANTERA D.R. ACCOUNT (D002980357)					
	Operation	ns Quested Not Sold			
From Date: 211/2010	- III		To Date: 5/1	2210	
Quoted For Devership: US CANTERA	OLR ACCOUNT (000099207)	1			
Quoted By Usen Ai	- 10		2		
		/ew Report			
Operation	Variation	Oute Quoted	Customer Rama	Dealer	Dear Manue
ADIATOR ASTEMBLY, REPLACE		119/2010	Budget Truck Renal / Tulke	080099027	Richard Harsen
	1.00	and To Excel			
		for an and a second			
		*			
A1					

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

NOTES

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.

Repair Management	Home	e Estimating e			
Home Estimate Dealer Customer	Vehicle Links			Print Feedback	Preferences Logoff Help
US CANTIRA DUR ACCOUNT (000098207) 4201 WARELD ROAD, WAREDWOLE, L 60515 Guick Open Estimate:	11	/ehicle: ::: Dwnec: VBc tingine:		Sature :	(Culture)
 0 records were found 					
My open estimates from past 2 days	Advanced Sea	arch .			
		ill imas any cliff bell	li Cannai Tima US & Canadai		
		the second second second			

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

Business and Contact	Information				
Dealer Account:	CANTERA US D.R. YEST ACCT 10000	70 - 2	Country:	UNITED STATES	
Dealer Locations	AL WARRENVELLE (DOD)	14	Address Line 1i	1	
Business Namer	1	-	Address Line 2:		
			Postal Code:		
Depts	Sales (SLS) Service (SVC)	Parts (PRT)	Cityr	[
Alas:			State:	++Select ++	Verify Addre
TEMPI	O'Yes @No		Phone:	USA/Canada	
Primary Vocation:	Select	2	Contact First Name:		- 12
Carrier Type:	Select		Contact Last Name:		
		-	Contact Phone:	USA/Canada	
			Emails		
FLEET INFORMATION	(You must complete information for a	at least one vehic	ke sander)		
Vehicle Center	Predominant Make		#Fleet Units	#International Units	
Medum	Select	122			
Heavy	· · Select · ·	102	1		
Severe	· · Select · ·	0			
D0.s	++Select++	0			
Which make the second shift which an affin	orized to assign customer numbers.			Assign Cust. Num. Save	Close Hel
TOU are contenus not auto					

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.

		Verified Postal Address
Company Name:	Peridot Trucking	Peridot Trucking
Country:	UNITED STATES	Addison, IL 60101-2856
Address Line 1:	621 S. Addison Rd.	
Address Line 2;		
City:	Addison	(i) The partial address use unified
State Or Province	ILLINOIS	The postal address was verned
Postal Code:	60101	
	Verify	Accept
		Close

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

• Click the Accept button to accept this address.

instances and contact	Information	_			
Dealer Account:	CANTERA US DUR TEST ACCT (000099)	34	Country:	UNITED STATES	1
Dealer Location:	ILI WARREN TILE (2017) 🕺		Address Line 1	621 S. Addison Rd.	
🗄 Business Namer	Pendot Trucking		Address Line 2:		
Standardized Name:	O Pendot Trucking (recomme	inded)	Postal Code:	60101 4918	
Dept:	Sales (SLS) Service (SVC) Par	ta (PRT)	Oby:	Addson	-
Alast		-	State:	ILLINOIS 💟 Ver	ify Address
TEMP	O Yes ⊙No		Phone:	USA/Canada A30 - 555 - 5855	
Primary Vocation:	Select	121	Contact First Name:	Joe	
Carrier Type:	· · Select · ·	12	Contact Last Name:	Bums	
			Contact Phone:	USA/Cariada 630 - 555 - 5858	
			Enals		
LEET INFORMATION	(You must complete information for at less	t one vehic	le center)		_
Vehicle Center	Predominant Make	1. A. M.	#Fleet Units	#International Units	
Medum	+ Select ++	12			
- Heavy	++Select ++	1			
Severa	++Select++	123			
Bus	Select	2			
	wheel to ensure our strengt to enhance			Long Car fun Next Cuse	Help

 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.



populates the Estimate header.

NOTES

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.

Home Estimate Dealer Customer 1	Whide Links	Prist Feedback Preferences Logoff H	Pp Banne
US CANTIRA DLR ACCOUNT (S0009R05) (251 WRVELD RDAD, WARRDVILLE, L 00515 Dates Open Estimate:	Vehicle: E Dwee: VII: Engive:	Clastomer: 5 Status: 7 Setus: 7	
 0 records were found 			
My open estimares from past 2 days	Advances Balach		
	Copyright 3018 Nave	shar, soc.	
-	ant (maxims) (2477-24134) Cannal	Time US & Canada	
n	Copyright 2018 Nam	star, Inc. Time (18 & Canada)	

click on the Customer List icon.

Repair Management	Home		1
iome Estimate Dealer Customer Vehic	ie Links	Print Feedback Preferences Logoff He	p Ba
US CANTIRA QLR ACCOUNT (80089207) 201 WINFELD ROAD, NARRENVILLE, L 60555 201ck Open Estimate:	Vehicle: ::: Owner: VII: Engine:	Customer: 📰 🔍 🕈 Status:	
 0 records were found 			
	Select Customer		Print

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

Repair Management Home					
iome Estimate Dealer Customer Vehicle Links	Post Fee	dback Preferences Logof	Heip Bi	anner	
Veh CANTIRA D.R. ACCOUNT (BODDHOLT) Veh 251 WATELD ROAD OW AVARDINGLE, CODIS Nack Open Estimate:	icie: Customer: Contomer: Contomer: Stellar: Nec. Stellar: Vit	44			
 0 records were found 				*	
	Select Customer		Print	63	
 28 records were found. 	E FONGALIWER		- 1 0 Calif		
the second se					
And Antibust allowed watthe Continuant	200 C C C C C C C C C C C C C C C C C C				
S Seach @ Starts wet O Contain	a District deleted customets		21.5.00		
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Repair Management	Service Estim Home	ating
Home Estimate Dealer Customer	Vehicle Links	Print Feedback Preferences Logoff Hep Bar
US CANTIRA DUR ACCOUNT (SOCOSIDIT) 4251 WARED RDAD. WAREDWILE, L 60015 Gues Open Estimate:	Vehicle: Dwnec Vili: Engine:	◆ Customer E S And P Catage (Chicago, RJ) Battust 2 Dealer Customer
My open estimates hom past 2 days	Advances Dearch	
		Copyright 2018 Navislar, Inc.
	All lines	ann 10477 Ad Mill Carmai Them 115 & Carmain

• Click the Customer Overview icon in the Estimate header.

Actions Tools Return							
S and P Cartage	12						n (
Besiness Information (Incomplete to submit custo	stner, SPA or DTU)						
Business Name: S and P Cartage Alas: S and P Cartage Customer Number: Unit Promp Customer:			Dept:	Sales (RLS)	Service (SIC)	Parts (PRT)	
Addresses							
Address	Type			Country		verfied	
E 5668 N. Central Av. Chicago, 1. 66688	Prin	ry Location, Mailing				Fait Street Typ Apertment Num	e/Drection or iber
Contacts							
Contact Name	9.5 SVC PI	T Phone	Mobile		Enal		Print
H Williams, Steve	Ø	(312) 886-8778			steva kueler	granstar.com	Ø
Fleet Information (Decomplete to submit custome	r, SPA)				-		
Vehicle Center	Predor	rinant Male		First Units	Ind Units	Amuai Mies	Replacement Cy

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.

and F Cartage	000035-20
Select Contact:	Select Add
Dept:	Sales (SLS) Service (SVC) Parts (PRT)
Salutation:	Select
First Name:	Ron
Middle Name:	
Last Name:	Dell
Suffix:	Select
Business Title:	Select
Purchase Role:	Select
Phone:	USA/Canada 630 - 654 - 9898
Fax:	USA/Canada
Mobile:	☑ USA/Canada
Pager:	USA/Canada - Pin:
Email:	R.Dell@S-PCartage.com
Primary Contact(S):	Primary Sales Contact Primary Service Contact Primary Parts 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.

nd P Cartage	000099-2
Select Contact:	Dell, Ron Add
Dept:	Sales (SLS)
Salutation:	Select
First Name:	Ron
Middle Name:	
Last Name:	Dell
Suffix:	Select
Business Title:	Select
Purchase Role:	Select
Phone:	USA/Canada 630 - 654 - 9898
Fax:	USA/Canada
Mobile:	🗹 USA/Canada 🔄 - 🔄 -
Pager:	USA/Canada - Pin:
Email:	R.Dell@S-PCartage.com
Primary Contact(S):	Primary Sales Contact Primary Service Contact Primary Parts Contact
	Save Delete Close Help

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

Actions Tools Return									He
5 and P Cartage								- 60	1099 20
lasiness Information (Incomplete to submit custom	er, SPA or DTU)								
Business Name: 5 and P Cartage			Dept:	Sales (SLS)	Service (SIC)	Parts (PRT)			Updat
Alae:: 5 and P Cantage									Delete
Custoner Number: 114									
 Prong Gistanet 									
Addresses									
A02ESI	Tip	e		country		Verbez			Add
E 2000 % CETERA AV. Chicago, 1. 60608	100	ary rocatory-saing				Apartment Num	e/Unection ber	ø	Updat
The second second						A CONTRACTOR OF THE			Delete
Contacts	Vertical	1999 1110	17.000					10111	
Contact Name	S5 5/C 9	RT Phone	Mobile		Enal	10100		Printery	Add
m Del, Kon	8	(630) 634-9898			R.Delaberco	erage.com	1		Updat
H Williams, Steve	8	(312) 886-8778			steve Aueler	Øneristar.com	1	Ø	Delete
First Information (Incomplete to submit customer, 5	(A)								
Vehicle Center	Predo	minant Maile	11	Fleet Units	IndUnits	Amul Miss	Replacer	tent Cycle	Add
o feet information exists for this customer.									
The customer is base complete. Incomplete to submit custo	ner, SPA or DTU for O	stoners in USA/CANAD/	Karly, Thyl						
and the second se									

The new contact now appears in the Contacts tab.

NOTES

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.

tome Estimate Dealer Custome	Vehicle Links	Print Feedback Preferences Logoff Heip	Banner
US CANTIRA DUR ACCOUNT (S00099017) 1251 WRITELD ROAD, WARRINGLE, L. 60015 Dack Open Estimate:	Vehicle:	Castomer: 5 Status: 5 Dent Custome	
O records were found	ř.		
My open estimates from past 2 days	C Advanced Dearch		
	and the first state of the second second		
	Company Market Market Market		
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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.

Home Estimate Dealer	Dustomer Vehicle Links	Print Feedback Preferences Logof	Heip Ba
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 Begin by clicking in the Search text box. Type the first three letters of the customer name, Marcel's Cartage. Click the Search button.

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Repair Management: Using Service Estimating for Dealer Administrators • © 2012 Navistar Inc. All rights reserved.

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Click the Description link.

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The New Estimate screen opens.

Repair Management	Service Estimating New Estimate			in the
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• 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.

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Home Estimate Dealer Customer Vehicle	Links			Print Feed	back Preference	s Logot	Heip Bann
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• The estimate is populated with customer and vehicle information.

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 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.

Repair Management Service Estimating Estimate	
me Estimute Dealer Customer Vehicle Links	Print Feedback Preferences Logoff Help Bane
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19 · HEAT, A/C, WIPER'S, SEATS	
≘ ∮flavistar	
· Thermostat Dwitch, Replace	
58 - BUS BODY - AIR CONDITIONER & RELATED COMPONENTS	
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 This generates a list of operations related to the term that was searched on. Expand the Engine Thermostat, Replace operation.

Repair N	mmand [®]	Service Estimating Estimate		I		
ome Estimate	Dealer Customer Vehi	de Links	Print Fe	edback Preferen	ces Logoff	Heip Banner
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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.

Repair	mmand Management	Service Estimating Estimate			Y		A lan
she Estitut S Carmu B.A	e Desler Cuslomer Veh	Vehane VNSH Value VVS	2000 / 40 20	Part Fee	sdback Preferen	E Copoli	Hep Bann
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 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.
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r WAVELD ROAD. RREWYLLE, L 60515 ISR Open Estimate:	Dweet Nacets Catage Vill: 4v5x2x45x1d667 tingive:	WC 200 / 614 94	Datus 2	Annel's Cartage Oncoger (L) Mealer Customer	8 / 04
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Ergine Thermostal, Rep	face				
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A12-5220	7000 , Haxeforce FII13 , Gna srbot	ón	1.7	25	Family
O A12-4223	RE200 RE300 , MaxieFarce B/16/CT		3.4	2	Family
O A12-5221	Other Hadets , Maxiforce 11/13 , O	ine or both	1.1	15	Family
A+2-4220	Other Models . All Other Engines		6.9	15	Family
A12-4222	Models, ALL , 07486/578 , Beginning #0000001	g with Engine Ser	1.0	15	Family
Q A12-3228	ALCOHER, 07.466430, 07.46643	sol .	4.5		Family
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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.

Inene Defin	rela Datlar Australia Unit	da Elvia		Drive Fee		
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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.

Solidad Construction Volume		te Dealer Customer Vehi	de Links	Prat Fee	dback Preferen	ces Logoff Heip Ba
Solicit Crossiscon File Interact Categories Search: Retresh: Bubot Can 12 - E9/2016 Search: Retresh: Bubot Can Search: Retresh: Search: Retresh: Bubot Can Search: Retresh: Search: Retresh: Bubot Can Search: Retresh: Retresh: Retresh: Bubot Can Search: Retresh:	NAVELD KO OPPIVILLE, L I S Open Estin	AD. eosis nate:	Wennen Vrädel Voles WC 2000 2000 2000 Dween Barot's Catage Vite 4v5/C2045/ridde754 Engine	Butter 2	Annal's Catage Oncage: 1.1 Realer Customer	8/0s
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A 12-5221 Other Hades , Haxinforze 11/13, Che ar both 1 1 15 Family A 12-4220 Other Hades , A 20mer Enginee 2.9	-	Q A12-4223	RE200 RE300 , MaxoPurce B150CT	1.6	2	Fanly
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 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.

	Part Bumber		Part Name		Gity	Prix	e	Cone	Action
	10				1. T.				Add
			Navistar Parts						
	Part Number	Service Note	Part Name	Qty	Price	Core	MktMeth	CondCode	Inventory
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×D	1825000C1	Not Serviced -	TUBE FILTER INLET						
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0 ×:	2506764C1 (3535682R1)		CLAUP RADIATOR BILET	- t -					
12	299402C1 (299401C1)		CLAVE, HOSE 515" X 902"	1					
SASKET.	THERMOSTAT(123-3720-825)								
SEAL THE	RMOSTAT(123-7468-891)								

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

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

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



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

NOTES

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



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

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Operation Documents:	

 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.

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• To return to the estimate, click the red X at the upper right corner.

Notes



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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.

E-mail

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• To email your estimate to a customer, click the E-mail link.

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• 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

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.

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

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

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

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• 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.

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	1	ave Save (and begin	estimate) Return		
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• 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.

US CANTINA D.R ACCOUNT (D000980 4251 VINIFELD ROAD, INARREVILLE, Le 6555 Duint Open Extimater	PROSTAR-125 6x4 SPC COMIN SUS CHASSE TERNATTAR SPA 4x2 3000 RE 4x2 8x5 1200 4x2 8x5 3000 RE 101 CHASSE 4155 18A 4x2		Customer: E Status: 2	Aaa Transport (Metose Park, IL) Dealer Customer	1/-0%
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- 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.

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		and fact safe, etc.	and a low set of the s		

- 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.

US CANTERA DLR ACCOUNT (DRIDWO) 4231 URVELD ROAD	7. E9			aa Transport 🔍 🚌	1-8%	
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NOTES

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

US CANTERA DJ 251 WRFELD RO NARENVILLE, L Jack Open Este	ACCOUNT (2002) AD 60515 Tuele:	19257)	E .	Vehicle Owner Vill Engine Select Winde	1	Ch	stomen 🖂 🛰 Status:	+			
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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.

			1
Home Estimate Dealer Custom US CANTERA DLR ACCOUNT (000099207) 4201 VIBIFELD ROAD, INARREVNLE, L 60055 Guick Open Estimate:	Vehicle Enks Vehicle E Owner: Viik Engine:	Pret Fee3bick Preferences Logot Hep Customen ⊟ Q .↓ Status:	Bán
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• 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.

US CANTRA DLR ACCOUNT (00009207) 4201 WINFELD ROAD, WARRENVLLE, L 60555	Vehicle: Owner: VIN Engine:			Customen 🗮 🍳 🕂 Status:		
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• Click the Description link for this chassis number.

me Estimate Dealer Custor	ter Vetside Linka		Plant Feedback Preferences Logoff Help Ban
CANTERA D.R. ACCOUNT (D0099257) II WENFELD ROAD ARENVILLE, L. 66516 III Open Extimate:	Select From Luk Add New Vehicle = E Eco EdE Vehicle = Garys 7 Remove Vehicle = 3751672 View Vehicle Estimates #	Dump Ford F- 2000	Customer: 🗄 Gary's Trucking 🔍 🗊 🦯 — 🕀 😋 Status: 🔔 Dealer Customer
	Transfer Vehicle	New Estimate	
	Pats By Operation		
Current Complaint			

 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.

Repair Management	Vehicle Transfer		Fort Feedback Professores Load Han Resour
S CANTERA D.R. ACCOUNT (200098257) SI WINFELD ROAD, AREMINELE, L. 60515 III R. Doon Extimate:	Vehicle Ford Dump Ford F- 660 2000 Owner: Garys Trusking Viel Stratifications	+/-	Customer: E: Gary's Tracking Call
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matructional (The new screen	he pur muse		 Search for ion add) the new costonner Great the countoner If the owner of the selected vehicle is different has the swedde cootinner, then the huttin to you had will add add Clock the buffon to transfer the vehicle owner to the selected customer

 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.

US CANTIRA D.R. ACCOUNT (D00098257) 4251 YUMPELD BOAD, WARREWYLLE, L. 60516 Date: Open Falimeter	Vehicle :: Ford Dump Ford F- Eco 2000 Ovme: Carys Tracks Vie Strandbiska22006 Eggine	Customer: Gary's Titching Cut /
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matructional (This tare is a star	N TV INNIN	 To bransfer a vehicle. Clice the customer search icon Search for lor add) the new customer Gleat the outstomer If the owner of the selected vehicle is different to searcher would customer. The owner of the selected vehicle is different to your left will appear Clice the Sudon to transfer the vehicle own to the selected customer.

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

tome Estimate Dealer Customer	Vehicle Links		Plat Feedback Preferences Logot Help Ba
US CANTERA D.R. ACCOUNT (D0088257) 1251 WRAFLD RDAD NARRENVLLE, L. 60515 Delsk Open Estimate	Vehicle = Ford Cump Ford F- 650 2000 Owner: Gary's Trylling Vm 3FE-8525364222006 Engine	+/-	Customer: E Gary's Trucking Customer E (Chicago, IL) (Chicago, IL) Status: Categoria Customer
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 Begin by clicking in the Search text box. Type the first few letters of the customer name, Keep. Click the Search button.

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Home Estimate Dealer Customer	Vehicle Links		Print Feedback Preferences Logot Help	- Bar
US CANTERA D.R. ACCOUNT (D00580351) 4351 WARFELD BOAD, WARFENGLE, L. 60515 Gent Open Felimate:	Vehicle III Ford Dump Ford F- 660 2000 Owner Gary's Trusting Ven 276188225364220206 Engine	+/- 6%	Customen III Gary's Trucking Customen III (Chicago, IL) Matwic & Dealer Customer	8
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Click on the new owner, Keep on Trucking.

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US CANTERA DUR ACCOUNT (B0008903F) 4251 WRI/FELD ROAD, WARREN/RLE, L 60515 Gelek Open Extinute:	Vvhicle I: Ford Dump Ford F- 660 2000 Owner Garja Truining Ves Steladizonia.20006 Engine	Customer: E: Keep On Trucking & 20 - 6 15 Watermille, EJ Mahat & Dealer Customer
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8/		

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.

Repair Management	Service Estimating Vehicle Transfer	
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US CANTEAN DUR ACCOUNT (00098257) 4251 WINNELD ROAD, WARRENVOLLE, L 60515 Guick Open Extimates	Vetacle Ford Dump Ford F- 650 2000 Owner Key on Tucking Veta Stratt2006	Customer E Keep On Trucking Will /
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• Now you see a message indicating the vehicle has been transferred. Click the New Estimate button to proceed.



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

NOTES

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

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Home Estimate Dealer	Customer Vehic	de Unks	Print Feedback Preferences Lo	ogoff Help Ban
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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.

Home Estimate Dec	sler Customer Ve	hide Links		Print Feedback	Preferences Logoff Help
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• To view the past estimates for this customer, click on the Past Estimates icon at the end of the row.

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12262														

• 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.

Repair management	Cannade	23 112 1	
me Estmale Dealer Customer Ve	itide Unks	Print Feedback Preferences Logoff Help	Banne
or wh/PELD RD. uniterrytic, E. 60005 Ash Open Estimates	Wernern AAN Flocking Werner HAAN Flocking Werner HAAN Flocking Werner HAAN Brocking Werner HA	Stantoner Gart W David R / Class Status: 2 Dealer Customer	
eralions Pret Fees Attachments Elila	Estimate #10014 Created 2010-07-247 Have, Gel S. Ass # Notes: Assignment 1515	spred Halm, Gell S	
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The estimate opens. The estimate can be reviewed and modified as needed.

Using Find Estimate

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 To access the Find Estimate feature, click on Estimate in the menu bar. Click on Find Estimates.
LESSON 14: FINDING AN ESTIMATE

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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

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• Type in the person's user ID.

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LESSON 14: FINDING AN ESTIMATE

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

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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

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