PROJECT CONFIRMATION 3.0

DWELL TIME REDUCTION

Service Management Best Practices

DIAMOND EDGE CERTIFIED

Navistar, Inc.

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THE 6 STEPS

PROJECT CONFIRMATION 3.0 DWELL TIME REDUCTION

✓	STEPS	ACTIVITY
☐	1	Pull a Health Report with a Service Tool.
☐	2	Review Vehicle History (Warranty History, Case Files, etc...)
☐	3	Review Health Report. Do not clear codes; match them to customer complaints (if possible).
☐	4	Start with the Fault Code Action Plan for each DTC and utilize the provided information.
☐	5	Use the Diagnostic steps and SRT Elemental steps for every repair.
☐	6	Complete a Health Report once the repairs/service is complete.

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1. BEST PRACTICES

1.1. SERVICE WRITE-UP

1.1.1. Overview

The Service Write-Up process utilizes information that has been proven successful in capturing all the information for use in the dealership service department.

1.1.2. Goal

The process is designed to provide the Service Writer the best opportunity to capture an accurate customer complaint and information to increase the likelihood that the vehicle will be repaired quickly and correctly.

1.1.3. Staff Performing

The person performing these tasks can be either a technical or non-technical resource with the below skills:

1. Strong communication/phone skills
2. Conflict resolution
3. Strong computer skills
4. A general understanding of the features and operation of Navistar vehicles (or a willingness to learn)

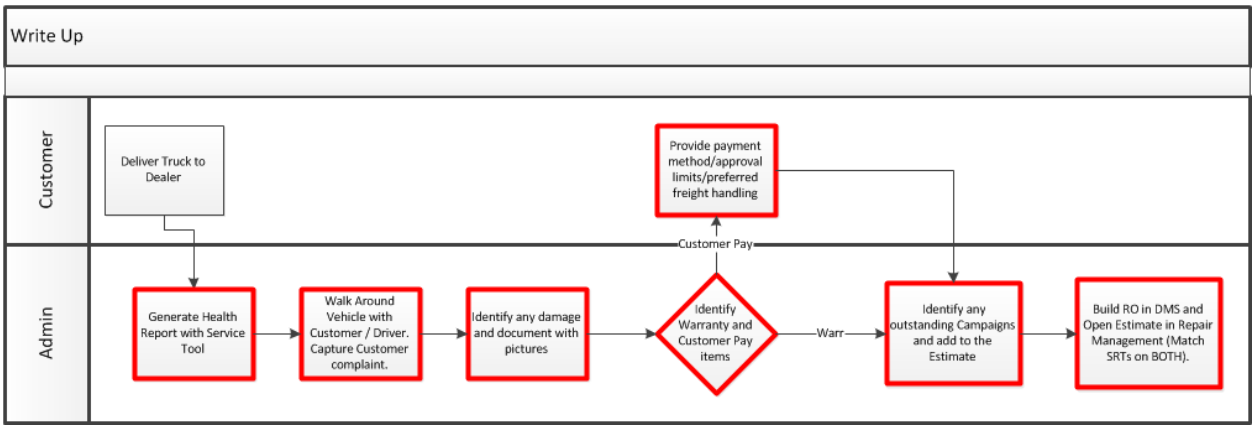
1.1.4. Interaction

1. Customer
2. Porter
3. Virtual Triage person
4. Service Supervisor
5. Dispatcher
6. Service Manager

1.1.5. Recommended Training

1. Dealer Management System (DMS) Training (system dependent)
2. Navistar Learning Management System (LMS) modules on the International® Service Portal™
3. Repair Management (RM)
    a. Service Estimating Introduction for Dealer Administrators
    b. Service Estimating Introduction for Service Advisors
4. PocketMaxx/EZ-Tech Launcher as appropriate
    a. PocketMaxx™ Training for Technicians
    b. EZ-Tech III Introduction and Usage
    c. Other LMS training classes as determined by Service Manager

1.1.6. Process Summary



This portion of the service process is accepting the vehicle from the customer, identifying all potential service needs, and setting/verifying customer expectations regarding authorization, communication, and preliminary time frame for repair completion. This is accomplished through consistent achievement of the below tasks:

Tasks within Process Flow:

1. In Person/Phone
    a. Greet customers and obtain all vehicle / customer information required.
    b. Interview customer to obtain vehicle concern(s).
2. At Vehicle
    a. Hook up Electronic Service tool (EST), utilize Health Report (HR) scan, and perform physical walk –around inspection of vehicle while scanning.
    b. Install seat covers, floor mats and hat (key) tags in vehicle.
    c. Document any physical damage and visible service concerns. (Take photos)
    d. Remove EST from vehicle.
    e. Note USDOT inspection date.

3. At Service Desk (Building Estimate / Repair Order [RO]):
    a. Identify and add any outstanding campaigns/calibrations required.
    b. Verify Health Report uploaded to International® Service Portal℠
        i. View engine codes in ranked order on health report.
        ii. Ask any follow-up questions as needed.
    c. Build preliminary RM estimate using available diagnostic and repair operations for identified concerns.
    d. Identify potential warranty/customer pay issues on estimate.
    e. Review and verify all vehicle issues, concerns, and maintenance needs with customer, calling out customer pay items.
    f. Verify customer method of payment, purchase order requirements, freight preferences, and authorization/estimate requirements.
4. Vehicle Acceptance
    a. Obtain customer signature on the RO and provide customer a copy of all pertinent documents.
    b. Accept keys for vehicle from customer.
    c. Park vehicle in designated incoming work vehicle area.
        i. Record parking space location on repair order.
    d. Identify and secure keys in accordance with dealership key management practices.
5. Determine Driver Accommodations (hotel, cab ride, etc.)
6. Create Repair Order Packet
    a. Dealer Repair Order
    b. Dealer Write-up form (typically handwritten)
    c. Additional service questionnaires (if applicable)
    d. Service Portal Summary Page printout
    e. Health Report with Ranked Codes Section open
    f. PC 3.0 Worksheet (complete first section)
    g. Courtesy Inspection form (If applicable)
7. Transfer RO to Virtual Triage Person for Review
8. Follow-up Activities
    a. Monitor repair Progress
    b. Communicate in-progress repairs to the customer

1.1.7. Identified Enablers

1. **Facility**
    a. Dedicated write-up area/bay
    b. Telephone
    c. Internet connected computer with multiple monitors
2. **Hard Tools**
    a. PocketMaxx/EZ-Tech with Launcher
3. **Software/Applications**
    a. Dealer Management System (DMS)
    b. Repair Management (RM)

1.2. VIRTUAL TRIAGE PROCESS

1.2.1. Overview

The Virtual Triage process utilizes the information collected from the Service Write-up and vehicle history to identify the correct diagnostic path and repair procedures for the technician to follow. This process is designed to identify the level of repair(s) required and reduces customer wait time.

1.2.2. Goal

To identify repairs required to address the customer's concerns and reduce the time to have their vehicle diagnosed. In addition, it is designed to maximize technician productivity by reducing time researching history and looking for repair information. The Virtual Triage process increases the likelihood that the vehicle will be repaired quickly and correctly.

1.2.3. Staff Performing

The person performing these tasks can be either a technical or non-technical resource with the below skills:

1. Familiar with Navistar diagnostics including Fault Code Action Plans (FCAPs)
2. Good computer skills
3. Good communication skills

1.2.4. Interaction

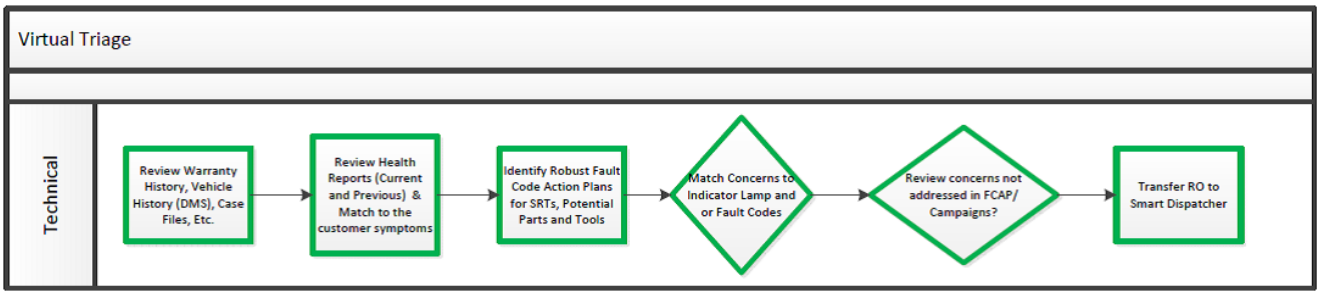
1. Service Writer
2. Smart Dispatcher
3. Service Supervisor
4. Service Manager

1.2.5. Recommended Training

1. Dealer Management System (DMS) Training (system dependent)

2. Navistar Learning Management System (LMS) modules on Service Portal
    a. Repair Management (RM)
        i. Service Estimating Introduction for Dealer Administrators
        ii. Service Estimating Introduction for Service Advisors
    b. PocketMaxx/EZ-Tech Launcher as appropriate
        i. PocketMaxx™ Training for Technicians
        ii. EZ-Tech III Introduction and Usage
3. Other LMS Training classes as determined by Service Manager

1.2.6. Process Summary



Process Summary

This portion of the service process is organizing and analyzing the data gathered from the driver, during the write-up process, and the Health Reports as well as the vehicle's history to develop an action plan. This action plan will be utilized by the technician during the repair process. This is accomplished through consistent achievement of the below tasks:

Tasks within Process Flow:

1. Review Vehicle History.
    a. Review the dealer's DMS unit history for any indicators that may help with the current faults and/or symptoms.
    b. Review warranty history.
    c. Review Technical Service case history.
2. Review Health Reports.
    a. Review current Health Report.
    b. Review previous Health Reports for the past 90 days.
3. Review faults in Ranked Order on Health Report.
4. Match the driver's concerns to the indicator lamps as well as the fault codes.
5. Review any concerns that do not have FCAPs or repairs identified.
6. Transfer RO to Smart Dispatcher.

1.2.7. Identified Enablers

1. **Facility**
    a. Telephone
    b. Internet connected computer with multiple monitors
2. **Hard Tools**
    a. PocketMaxx/EZ-Tech with Launcher
3. **Software/Applications**
    a. Dealer Management System (DMS)
    b. Repair Management (RM)

1.3. SMART DISPATCH

1.3.1. Overview

The Smart Dispatch process utilizes the information from the Virtual Triage process to identify the skill level of the technician necessary to diagnosis and repair the vehicle.

1.3.2. Goal

To utilize the technician's strengths and increase the likelihood that the vehicle will be repaired quickly and correctly. It also increases technician productivity by properly aligning his or her skills with each repair.

1.3.3. Staff Performing

The person performing this process should be a technical resource with the below skills:

1. Strong mechanical aptitude
2. Strong understanding of Navistar vehicles (or a willingness to learn)
3. Strong communication skills
4. Strong computer skills
5. Strong organizational and leadership skills

1.3.4. Interaction

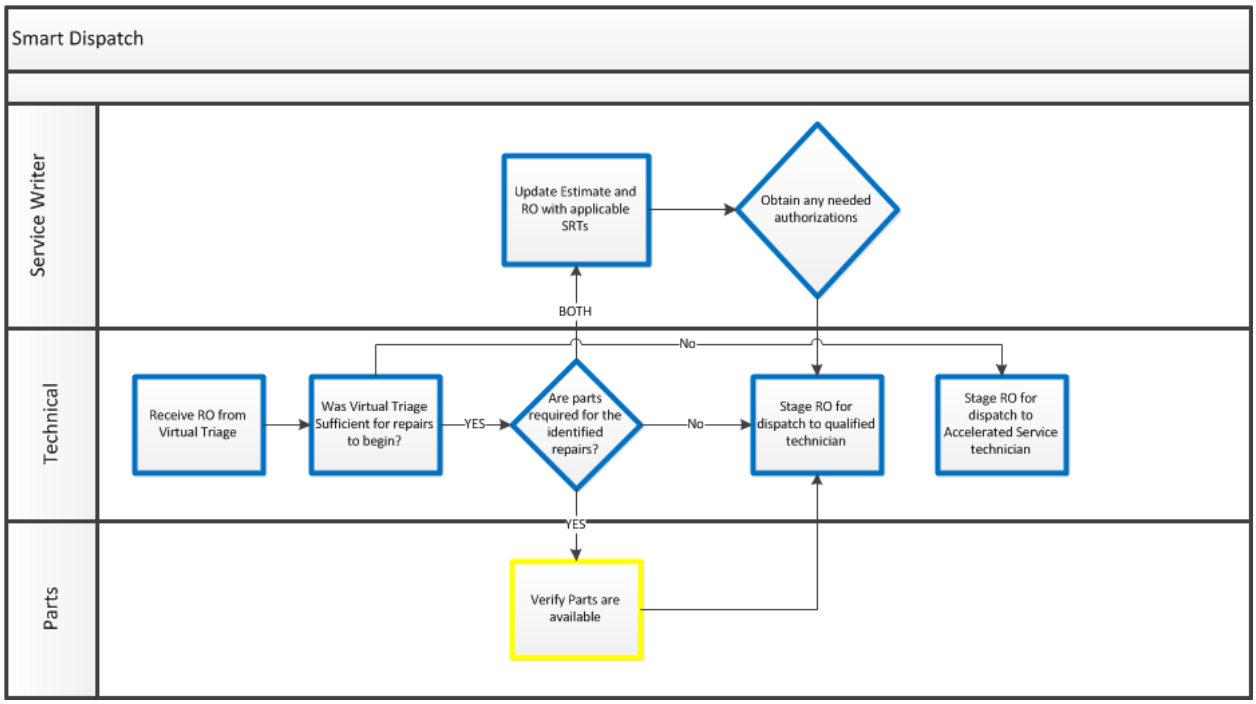
1. Service Writer
2. Service Supervisor
3. Service Manager
4. Service Technician
5. Parts Manager

1.3.5. Recommended Training

1. Navistar Learning Management System (LMS) modules on Service Portal

2. Repair Management (RM)
    a. Service Estimating Introduction for Dealer Administrators
    b. Service Estimating Introduction for Service Advisors
3. PocketMaxx/EZ-Tech Launcher as appropriate
    a. PocketMaxx™ Training for Technicians
    b. EZ-Tech III Introduction and Usage
    c. Other LMS training classes as determined by Service Manager

1.3.6. Process Summary



This process is designed to ensure that a properly trained technician is working on the vehicle and has the required information, tools, and parts to successfully complete the repair in a timely manner. The Smart Dispatcher communicates with the parts department to see if parts are available, and ensures the Service Advisor is kept informed about progress and the expected time of completion. This is accomplished through consistent achievement of the below tasks.

Tasks within Process Flow

1. Determine if Virtual Triage is sufficient for repairs to begin.
    a. If additional diagnosis is required, dispatch to Triage Tech.
2. Verify diagnostic materials and any related FCAPs are ready for technician.
3. Identify any parts on FCAP and verify stock.
    a. If items are not in stock, follow Parts Procurement Process.

4. Identify any special tools called out in FCAP.
    a. Verify tool availability for technician use.
5. Identify level of technician that work should be assigned to:
    a. Special Engine Technician
    b. Special Transmission Technician
    c. Remove and Install Technician
    d. Preventative Maintenance Technician
6. Dispatch repair order to qualified technician.
7. Ensure parts delivers required parts to technician's bay.
8. Communicate with Service Advisor to obtain any needed approvals and provide anticipated time line for repair.

1.3.7. Identified Enablers

1. **Facility**
    a. Dedicate write-up area/bay
    b. Internet connected computer with multiple monitors
    c. Repair order rack
2. **Hard Tools**
    a. None
3. **Software/Applications**
    a. Document containing all technician's training and strengths
        i. Refer to the Supporting Information section for an example.

1.4. PARTS PROCUREMENT

1.4.1. Overview

The Parts Procurement Process utilizes proven methods to obtain parts in the most efficient and expedient way. This process reduces the technician time at the parts counter waiting for parts or inquiring about stock. As a result the technician is more productive, leading to increased efficiency and increased parts sales.

1.4.2. Goal

To have the required service parts available when the vehicle is brought into the shop, allowing the technician to remain in the bay, increasing technician efficiency and parts sales.

1.4.3. Staff Performing

The person performing these tasks can be either a technical or non-technical resource with the below skills:

1. Knowledgeable with the parts identification and lookup process
2. Knowledgeable with the parts ordering process

3. Knowledgeable with the parts department layout
4. Good communication skills
5. Good computer skills

1.4.4. Interaction

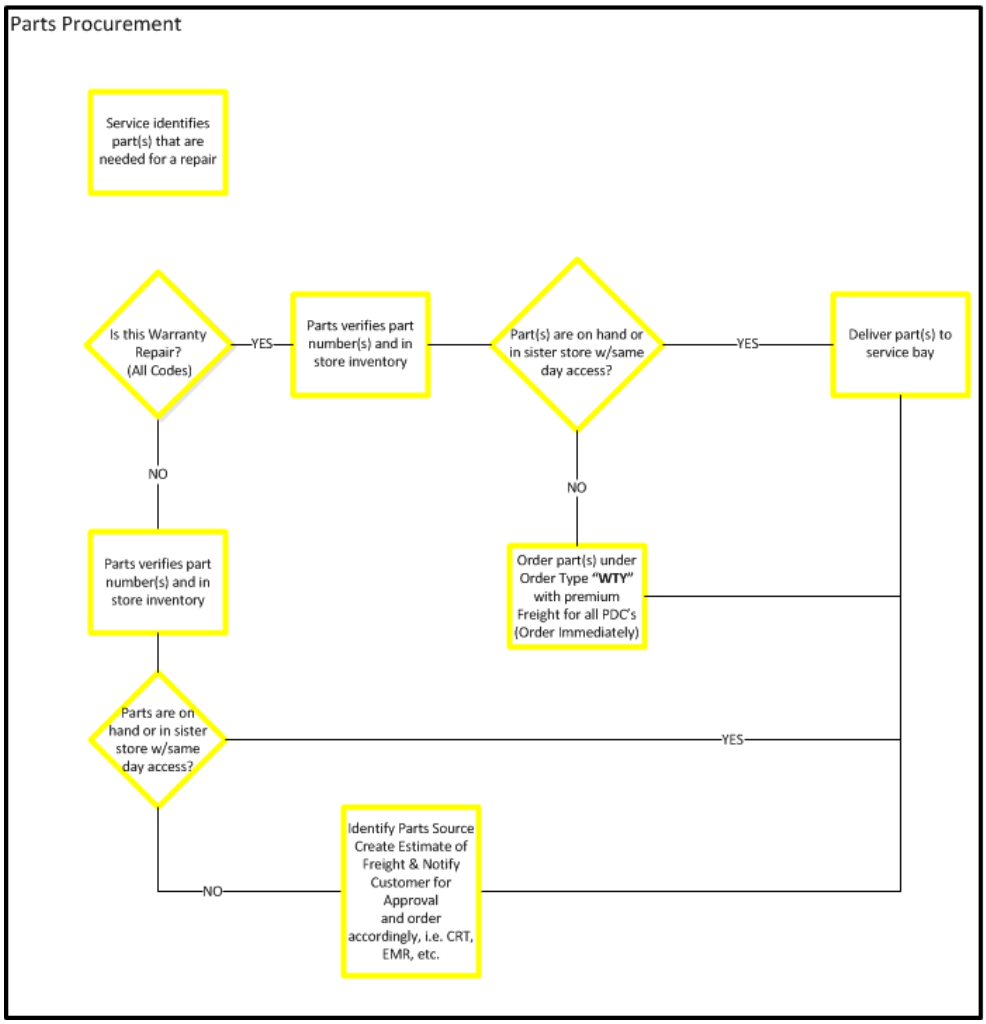
1. Smart Dispatcher
2. Service Technician
3. Parts Runner
4. Additional parts personnel

1.4.5. Recommended Training

1. Navistar Learning Management System (LMS) modules on Service Portal

    a. Parts Catalog
    b. Parts Catalog Online - Basic Part Search
    c. Parts Catalog Online - Intermediate Part Search
    d. Parts Catalog Online - International Works Kit
    e. Parts Catalog Online - Message Area, Support Menu & Quick Links
    f. Parts Catalog Online - My Chassis List
    g. Parts Catalog Online - Search Menu
    h. Parts Cross Reference / Fleet Cross
    i. Parts Pricing and Inventory Management Training
    j. Other LMS training classes as determined by Parts Manager and/or Service Manager

1.4.6. Process Summary



Key Enablers:
1) Identify Warranty Coverage First
2) Only use inventory at Repairing location or same day sister store
3) Order all remaining warranty parts using "WTY" order type with VIN and Premium Freight
4) Order Parts immediately
5) No Freight to administer during warranty claim submission

Process Summary

This portion of the process is ensuring the parts are available for the technician prior to any disassembly resulting in tying up a service bay. The parts personnel will work in conjunction with the Smart Dispatch person at the dealership to identify any repair parts as well as any campaign or special parts required. This is accomplished through consistent achievement of the below tasks:

Tasks within Process Flow:

1. The Smart Dispatcher informs the parts personnel of part(s) needed.
    a. Identified by number from FCAP or a part description.
2. Identify each line on RO if warranty or customer pay.
3. If part(s) are customer pay, has customer authorized a freight payment?
4. Parts must understand all requirements and needed timing.
5. If the required parts are not in the dealership's stock or obtained from a "sister store" the same day, warranty items must be ordered **immediately** (do not wait for stock orders or daily orders).
6. If the unit is down, the parts are to be ordered as per G Letter (6/26/2015) G-99-9012-B **Free Shipping for Critical and Warranty Orders Shipped from a Supplier, Plant or Packager**.
7. Have parts runner deliver parts to technician's bay:
    a. Allows the technician to remain in the bay to be more productive
    b. Increases parts sales due to increased technician productivity
    c. Decreases dwell time, Increases customer satisfaction
8. Periodically review past orders to determine if there are key items that should be stocked in dealership inventory
    a. Dealer inventory must be visible using Dealer Inventory Alliance (DIA)
    b. Review DIA simulation level to ensure adequate support of your inventory needs

1.4.7. Identified Enablers

1. Facility
    a. Dedicated parts Area
    b. Telephone
    c. Internet connected computer with multiple monitors
2. Hard Tools
    a. None
3. Software/Applications
    a. Dealer Management System (DMS)

1.5. WARRANTY CLAIM SUBMISSION BEST PRACTICE

1.5.1. Overview

The warranty claim submission best practice utilizes proven methods to enhance claim submission/processing efficiency.

1.5.2. Goal

The warranty process best practice is designed to ensure all of the relevant information is in the claim during the first time submission so the claim only has to be touched by the dealer and Navistar once.

1.5.3. Staff Performing

a. The person performing these tasks can be either a technical or non-technical resource with the below skills:

   i. Strong computer skills

   ii. Strong understanding of warranty polices/practices or willingness to learn

1.5.4. Interaction

a. Service supervisor

b. Technicians

c. Original Equipment Manufacture's (OEM) Representatives

1.5.5. Recommended Training

a. Dealer Management System (DMS) Training (system dependent)

b. Navistar Learning Management System (LMS) modules on the International® Service Portal℠

   i. iClaim Program 1: Submitting Claims in iClaim - An Overview

   ii. iClaim Program 2: Submitting a Basic Claim in iClaim - Warranty 01

   iii. iClaim Program 3: Practical Application - Working with Various Claims in iClaim

   iv. iClaim Program 4: Practical Application - Loss and Damage Claim (Warranty 38)

   v. iClaim Program 5: Practical Application - Prior to Delivery Claim (Warranty 03)

   vi. iClaim Program 6: Practical Application - Service Parts (Warranty 55) & Sales Policy Adjustments (Warranty 02)

   vii. iClaim Program 7: When Your Claim is Returned

1.5.6. Process Summary

a. Begin with the 3Cs of the repair, Complaint, Cause, and Correction; the Health Report ID# and the Fault-FMI/SPN # being addressed. These should be the first Items in the comment area. Then list what was repaired and how the root cause of the failure was determined.

b. It is extremely important that when there are multiple failures or codes requiring repair, each claim section is clear on the Heath Report (HR) ID# and Fault-FMI # being addressed in that section.

c. The information provided will help the Navistar Warranty Adjudicator know exactly which HR# and Fault-FMI# are being addressed in the claim section, as well as the part replaced, so that he/she can understand the diagnostic path taken.

(If the diagnostic requires a longer explanation, the technician(s) write-up notes can be attached in iClaim.)

Example:

Condition, Cause, Correction:	HR#757808, SPN 27-7, EGR Valve Replaced, upon performing FCAP diag steps X,X,X determined valve is inoperable.

List the casual part that caused the failure first in the parts list used in this repair. This helps to more quickly identify the root cause of a failure.

Quantity	Part Number	Part Description
1	1234567C91	Valve, EGR
2	45678911C1	Tube, EGR
1	7654321C91	Connector

1.5.6.1. Submitting a Claim

At this point the repair order and resultant claim should read like a book and align with the technician's punch times. Anything that is out of place or does not fit should be reviewed for further understanding with Service Management before adding additional items to the claim.

1.5.6.2. Questions to Ask:

1. Why was this missing item/time not on the claim to begin with?
2. What activity did each person perform for each time punched on this job?

1.5.7. Identified Enablers

1. Facility
    a. Dedicated warranty administration area/desk
    b. Telephone
    c. Internet connected computer with multiple monitors
2. Hard Tools
    a. None

3. Software/Applications
    a. Dealer Management System (DMS)
    b. Access to the International® Service Portal™
    c. Repair Management (RM) System

2. SERVICE DEPARTMENT OPERATION

2.1. DEALERSHIP DAILY COMMUNICATION

Options:

1. Daily team meeting with service and parts management to discuss status of open repair orders to optimize service resources and to monitor parts availability.
    a. Go through work-in-progress statistics
        i. Yesterday's open repair orders
        ii. + Yesterday's new repair orders
        iii. – Yesterday's repair orders closed
        iv. = Current work in progress
    b. When known, profit/loss for prior month (first meeting of subsequent month)
    c. Identify high priority repairs
    d. High dwell time repairs
    e. Open case file repairs
    f. Vehicles with parts availability issues
        i. Find parts sourcing resolution
2. Daily e-mail to a distribution list
    a. Questions asked and answered in e-mail distribution chain keeps parts and service well informed.
3. Best practice is both of the above options: morning meeting with e-mail distribution list follow-up throughout the day on open items.

2.2. SHIFT TRANSITION

1. Ensure tech notes are completed in DMS before end of shift or punching off job.
2. Shift leads perform shop walk-through and discuss status of each unit/bay.
    a. Job priority
    b. Repair status (where previous technician left off)
    c. Update parts availability/timing
    d. Estimated time of completion
3. Review upcoming dispatch (at service desk).
    a. Appointments
    b. Waiters

NOTE – If person-to-person shift transition is not possible, it is recommended to log the same information on a shift transition log (refer to Supporting Information section).

2.3. SERVICE MANAGER BEST PRACTICES

2.3.1. Daily Routine

1. Perform an initial walk-around in the shop noting the following:
    a. Check for shop cleanliness and potential safety hazards
2. Walk the lot noting truck damage, doors and windows open, vehicles unlocked, trash, etc.
    a. Post shop's pervious day's gains / losses on board in service department in a highly visible area
    b. Conduct morning meeting with shop supervisor and service advisors:
        i. Review daily service sales report vs. goals from previous day
        ii. Discuss staffing for the shift
        iii. Review shift change notes for items that need attention
        iv. Review available work for the day
        v. Review repair orders for vehicles in the shop that are waiting on parts
        vi. Review repair orders for vehicles in the shop waiting on approval
        vii. Review log for vehicles completed over 4 days and not picked up
        viii. Note out of order shop tools and equipment
        ix. Review Diamond Edge dash board
    c. Spot check incoming repair order packets for proper paperwork and virtual triage information per PC 3.0 best practices
    d. Spot check completed repair orders for proper documentation and signatures necessary for processing
3. Review Service Portal "What's New" page for new AFCs, Recalls, and service information updates
4. Meet with parts manager to ensure parts orders and returns are being conducted per established dealer process
5. Provide ongoing feedback for the service team to maintain service department standards per PC 3.0 processes
6. Inform service management team of upcoming meetings and customer visits
7. Regularly walk through driver lounge to ensure proper communication about repair status and that customer needs are addressed
8. Monitor service team to ensure all customers are greeted upon arrival

2.3.2. Weekly Routine

1. Monitor Service Portal Vehicle Usage report to ensure team is utilizing all tools per PC 3.0 standards
2. Post weekly tech efficiency report in service area, should be in a highly visible area

2.4. SERVICE SUPERVISOR BEST PRACTICES

2.4.1. Daily Routine:

Perform an initial shop inspection:

1. Check status of repairs for vehicles in shop
2. Check overall cleanliness and safety
3. Ensure that shop service tools are returned to tool room
4. Review stall utilization form for work in progress, make corrections as needed, and inform Service Advisor
5. Check incoming repair orders for proper write-up paperwork and virtual triage information per PC 3.0 best practices
6. Conduct morning meeting with Service Manager and Service Advisors
    a. Review shift change notes for items that need attention
    b. Review available work for the day
    c. Review repair orders for vehicles in shop that are waiting on parts
    d. Review repair orders for vehicles in-shop that are waiting on approval
    e. Review C.O.D. file for vehicles completed over four days ago and not picked up
    f. Check for out-of-order shop tools and equipment
    g. Discuss previous day's sales report vs. goals
    h. Review Diamond Edge dashboard
7. Review necessary repair items and courtesy inspection findings with Service Advisor
    a. Note DOT inspection date, maintenance item
8. Ensure technicians are using proper diagnostic and/or SRT elemental steps for all repairs; redirect as necessary
9. Perform service department shift transition with the prior/next shift supervisor(s)

2.4.2. Review Parts Orders:

1. Review incoming parts order status with parts personnel
2. Follow up on truck down/special order parts
3. Notify responsible Service Advisor of parts delays so customer can be notified

2.4.3. Vehicle is Repaired and Road Check is Completed:

1. Quality Control personnel have signed off on road check and final inspection
2. Vehicle is parked and locked and the keys are returned to the Service Advisors
    i. A designated area for completed vehicles is recommended
3. Service Supervisor must review and initial the repair order for complete and accurate repair information noting complaint, cause, and correction.

2.5. SERVICE ADVISOR BEST PRACTICE

1. In Person / Phone
    a. Greet customers and obtain all vehicle / customer information required
    b. Interview customer to obtain vehicle concern(s)
2. At Vehicle
    a. Hook up Electronic Service Tool (EST), initialize Health Report (HR) scan, and perform physical walk-around inspection of vehicle while scanning
    b. Install seat covers, floor mats and hat (key) tags in vehicles
    c. Remove EST from vehicle
    d. Note DOT inspection date
3. At Service Desk (Building Estimate / Repair Order [RO])
    a. Identify and add any outstanding campaign/calibrations required
    b. Verify that Health Report was uploaded to International® Service Portal℠
        i. Ask any follow-up questions needed
    c. Build preliminary Repair Management estimate using available diagnostic and repair operations for identified concerns
    d. Identify potential warranty/customer pay issues on estimate
    e. Review and verify all vehicle issues, concerns, and maintenance needs with customer, calling out customer pay items
    f. Verify customer method of payment, purchase order requirements, freight preferences, and authorization/estimate requirements
4. Vehicle Acceptance
    a. Obtain customer signature on the RO and provide customer a copy of all pertinent documents
    b. Accept keys for vehicle from customer
    c. Park vehicle in designated incoming work vehicle area
        i. Record parking space location on RO
    d. Identify and secure keys in accordance with dealership key management practices
5. Determine Driver Accommodations (hotel, cab ride, etc.)

6. Create Repair Order Packet
    a. Dealer repair order
    b. Dealer write-up form (typically handwritten)
    c. Additional service questionnaires (if applicable)
    d. Service Portal Summary page printed out
    e. Health Report with Ranked Codes Section Open
    f. PC 3.0 Worksheet
    g. Courtesy inspection form (If applicable)
7. Transfer RO to Smart Dispatch for Review
8. Follow-up Activities
    a. Monitor repair progress
    b. Communicate in-progress repairs to customer
        i. Upsell additional repairs or maintenance items
        ii. Identify potential repair or parts delays
        iii. Provide repair completion time updates

3. JOB DESCRIPTIONS

3.1. DIRECTOR OF SERVICE

Organization: Service organization

Reports to: Dealer Principal

Interfaces with: Service Management, Dealer Principal

Position Purpose:

The Director of Service must lead and manage multiple service locations through productive staffing, technician retention and training, and promoting ways of improving efficiency and productivity while reducing costs in order to meet monthly and yearly objectives. An integral and vital part of any dealership is the service department and the manner in which it builds open, honest, trusting relationships with customers and all other department personnel within the assigned dealership.

3.1.1. Accountabilities:

- Ensure service centers' growth and profitability
- Understand and ensure compliance with all Navistar and vendor policies and warranty procedures
- Review service center's sales reports daily
- Review aging warranty debits with service managers to ensure follow up and payment
- Review aging open repair orders with service managers to ensure follow up and closure.
- Attend Navistar's Parts and Service annual meeting
- Keep abreast of all vendor updates, warranty policies and product changes to maintain effectiveness in this role
- Maintain a safe and clean work environment at all service centers
- Hold monthly meetings with service managers
- Attend dealer staff meetings
- Ensure that the service managers are performing their duties as outlined in the appropriate job descriptions.
- Perform monthly/quarterly/yearly performance reviews with all service managers
- Seek out and secure new service business

3.1.2. Minimum Qualifications:

- Must have a minimum of 10 years' experience in the medium / heavy duty truck and bus industry
- Must be customer focused and able to listen, understand and communicate professionally with all customers, both external and internal
- Must promote continuous improvement
- Must be self-motivated and have good written and verbal communication skills
- Must conduct oneself in a professional manner
- Must have the ability to accept and react to change and lead others in a positive direction
- Must have superior problem solving skills
- Must have the ability to perform various service roles to backfill in the event of absences

- Must be a team player with a strong sense of commitment to the customer

3.1.3. Desired Qualifications:

- Knowledge and use of all relevant software applications necessary to perform the functions of the role
- Good organizational skills
- Knowledge of dealer and fleet maintenance procedures and systems
- Willingness to pursue self-development courses
- Strive for respect and teamwork at all assigned service locations
- Posses a high degree of product and technical knowledge

3.1.4. Key Performance Indicators:

- Profit and loss of service department(s)
- Dwell time
- Technician efficiency
- Retention/turnover

This is not necessarily a list of all of the duties, responsibilities and requirements associated with this position. While the accountabilities noted herein are intended to be an accurate reflection of the current job, the dealership reserves the right to revise the functions and duties as circumstances change.

3.2. SERVICE MANAGER

Organization: Service Organization

Reports To: Service Director

Interfaces with: Service Advisor, Service Supervisor, Warranty Manager, Parts Manager, Customers, OEMs, Technicians

Position Purpose:

The Service Manager takes the lead role in managing an efficient and profitable service department through productive staffing, customer retention, technician training, and quality workmanship while improving productivity and reducing costs in order to meet objectives. The service department is an integral and vital part of the dealership, and the manner in which it builds open, honest, trusting relationships with customers and other departments is essential to dealership success.

3.2.1. Accountabilities:

- Ensure service department growth and profitability
- Ensure compliance with all Navistar and vendor policies and warranty procedures
- Monitor any outside purchases charged to the service department
- Review warranty performance statements with Warranty Administrator weekly:
    - Review warranty charge backs
    - Review aging warranty debits weekly to ensure payment
    - Review aging repair orders to ensure closure and payment

- Attend Navistar Parts and Service Managers annual meeting
- Maintain high quality service department standards
- Understand and keep abreast of all federal, state and local regulations that affect service operations, such as hazardous waste disposal, OSHA, EPA, etc.
- Conduct periodic spot checks of open repair orders throughout the day to ensure timely repairs, quality workmanship, and cleanliness
- Keep abreast of all warranty policies and product changes to maintain effectiveness in this role
- Ensure compliance with current manufacturers' vendor training courses for technicians and service staff
- Ensure that current and required tools are purchased as necessary
- Conduct monthly staff and technician meetings
- Interview their potential service department employees
- Ensure the service staff members are performing their duties as outlined in the appropriate job descriptions
- Seek out and secure new service business

3.2.2. Minimum Qualifications:

- Must have a minimum of eight years' technical experience in the medium/heavy-duty truck industry
- Must be customer focused and able to listen, understand and communicate professionally with all customers, both external and internal
- Promote continuous improvement within the department
- Maintain a high degree of product and technical knowledge
- Must be a team player with a strong sense of commitment to the customer
- Must be self-motivated and have good written and verbal communication skills
- Must conduct oneself in a professional manner
- Must have the ability to accept and react to change and lead others in a positive direction
- Must have superior problem solving skills
- Must be able to understand and communicate with all vendor and OEM guidelines

3.2.3. Desired Qualifications:

- Knowledge and use of all relevant software applications necessary to perform the functions of the role
- Good organizational skills
- A Commercial Driver's License (CDL) to operate and road test customer vehicles when needed
- Knowledge of dealer and fleet maintenance procedures and systems
- Willingness to pursue self-development courses applicable to the job
- Working knowledge of Navistar and supplier/vendor warranty policies
- Strive for respect and facilitate teamwork in the department and throughout the dealership

3.2.4. Key Performance Indicators:

- Profit and loss of service department
- Dwell time

- Technician efficiency
- Employee retention/turnover

This is not necessarily a list of all of the duties, responsibilities, and requirements associated with this position. While the accountabilities noted herein are intended to be an accurate reflection of the current job, the dealership reserves the right to revise the functions and duties as circumstances change.

3.3. SERVICE ADVISOR

Organization: Service Organization

Reports To: Service Manager

Interacts with: Customer, Service Supervisor, Service Manager, Warranty Administration, Parts Personnel, Technician

Position Purpose:

The Service Advisor takes the lead role in achieving high customer satisfaction by performing one's duties in accordance with the current dealership practices and procedures. The service department is an integral and vital part of the dealership, and the manner in which it builds open, honest, trusting relationships with customers and other departments is essential to dealership success.

3.3.1. Accountabilities:

- Greet customers in a timely, friendly manner and obtain all specific vehicle/customer information required for proper repairs, contacting customer and invoicing
- Coordinate receipt and flow of all incoming work, communication with customers, and constant communication with all other internal departments
- Write up customers' vehicle issues and concerns or maintenance requirements accurately and clearly
- Obtain customer signature on the repair order and provide customer a copy of the repair order
- Must be able to understand, communicate, and evaluate all vendor and Navistar warranty guidelines, approval processes, and policies during the write up and repair process
- Establish customer's method of payment, purchase order requirements, and estimate requirements if needed at time of write-up
- Investigate progress of vehicle repairs and contact customer with status changes / promise time as required
- Ensure vehicles are parked in assigned areas, trucks are locked, and keys are tagged and properly stored
- Explain completed work and charges to the customer
- Keep up to date on all warranty policies and product changes to maintain effectiveness in this role
- Have the ability to utilize Service Portal at the time of write-up
- Review C.O.D. repair orders to ensure the vehicle and keys are on premises
- Contact customers regarding any additions or changes to the repair of their vehicle, if required
- Explain cost and time requirements in detail, and obtain the proper authorization before any additional repairs are made

3.3.2. Required Qualifications:

- Must be a team player with a strong sense of commitment to the customer

- Must be self-motivated and have good written and verbal communication skills
- Must conduct oneself in a professional manner
- Knowledgeable in the use of all relevant software applications necessary to perform the functions of the role or a willingness to learn

3.3.3. Desired Qualifications:

- Good organizational skills
- Working knowledge of Navistar and supplier / vendor policies
- Possess a valid Class A - Commercial Driver's License
- Posses the ability to communicate service maintenance requirements, such as oil change interval, axle lube changes, required adjustments, etc.
- Ability to notify customers of needed vehicle repairs while in the service area, such as quick check items

3.3.4. Key Performance Indicators:

- Average labor hours and dollars per RO
- Average parts dollars per RO
- Average number of ROs processed per day/week/month
- Number of ROs open for an extended period of time

This is not necessarily a list of all of the duties, responsibilities and requirements associated with this position. While the accountabilities noted herein are intended to be an accurate reflection of the current job, the dealership reserves the right to revise the functions and duties as circumstances change.

3.4. SERVICE SUPERVISOR

Organization: Service Organization

Reports To: Service Manager

Interfaces with: Service Advisor, Technicians, Warranty Administration, Parts Personnel, Customers, Vendors

Position Purpose:

The Service Supervisor provides a vital communication link with service technicians and with other integral departments in the dealership, particularly the parts department. This position directs and supports the service technicians to ensure that all repairs are performed correctly and efficiently by qualified technicians. The Service Supervisor ensures the service department consistently maintains a high level of customer satisfaction and adheres to all company and safety policies and practices. This position is crucial to achieving the highest level of customer satisfaction by performing duties in accordance with current OEM practices and company policies and procedures.

3.4.1. Accountabilities:

- Oversee the flow of all service work, technician accountability, vehicle repair completion, documentation, and continuous communication with the Service Advisors
- Understand and ensure compliance with all Navistar and vendor policies and warranty procedures
- Maintain a high level of quality service repairs

- Investigate the progress of vehicle repair completion by conducting periodic spot checks of all jobs throughout the day to ensure timely repairs, quality workmanship, and cleanliness
- Ensure that all completed vehicles are parked in the designated area, locked with keys tagged and returned to the service office
- Keep abreast of all warranty policies and product changes to maintain effectiveness in this role
- Provide on-the-job technical support for technicians as required and assist in the development of their technical skills and abilities
- Ensure that all repairs are documented, technicians' comments are descriptive and precise, and that the allotted time is noted prior to dispatching work
- Review and sign off on all completed repair orders, noting technician comments, repair completion, and road test completion
- Understand and keep abreast of all federal, state and local regulations that affect service operations, such as hazardous waste disposal, OSHA, EPA, etc.
- Knowledgeable in work management/Smart Dispatch
- Maintain a safe and clean work environment
- Ensure that all work is fairly and equally assigned
- Ensure the proper use, care and storage of all tools
- Attend all service department staff meetings as required
- Provide backfill for Service Advisor when needed

3.4.2. Minimum Qualifications:

- Must have a minimum of 5 years technical experience in the medium/heavy-duty truck industry
- Must have a valid Class "A" Commercial Driver's License
- Must have a high degree of product and technical knowledge
- Must be a team player with a strong sense of commitment to the customer
- Must be self-motivated and have good written and verbal communication skills
- Must conduct oneself in a professional manner
- Must be flexible and adapt to change readily
- Must have superior problem solving skills
- Must be able to understand, communicate, and evaluate all vendor and OEM Warranty guidelines, approval processes, and policies

3.4.3. Desired Qualifications:

- Knowledge and use of all relevant software applications necessary to perform the functions of the role
- Good organizational skills
- Willingness to pursue self-development courses
- Strive for respect and facilitate teamwork within assigned area

3.4.4. Key Performance Indicators:

- First time quality

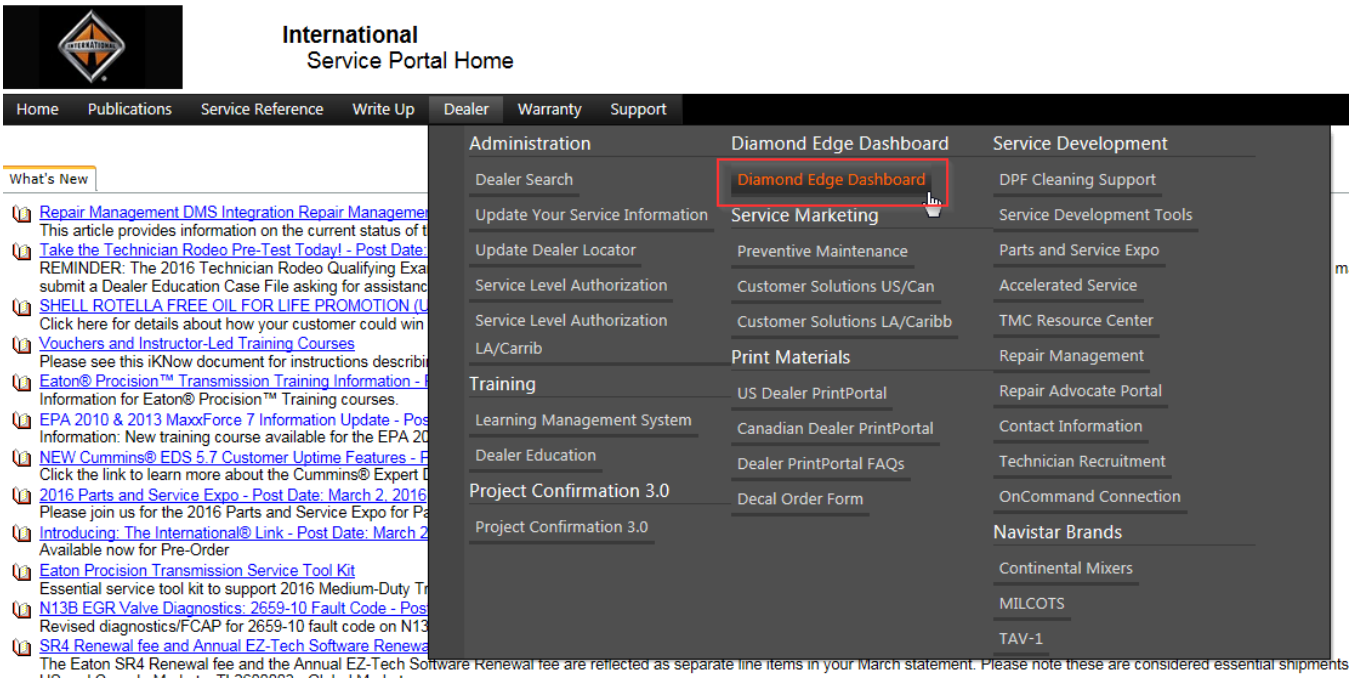
- Technician efficiency
- Dwell time
- Technician training completion rate

This is not necessarily a list of all of the duties, responsibilities, and requirements associated with this position. While the accountabilities noted herein are intended to be an accurate reflection of the current job, the dealership reserves the right to revise the functions and duties as circumstances change.

4. SUPPORTING INFORMATION

4.1. DIAMOND EDGE

4.1.1. Diamond Edge Dashboard via Service Portal

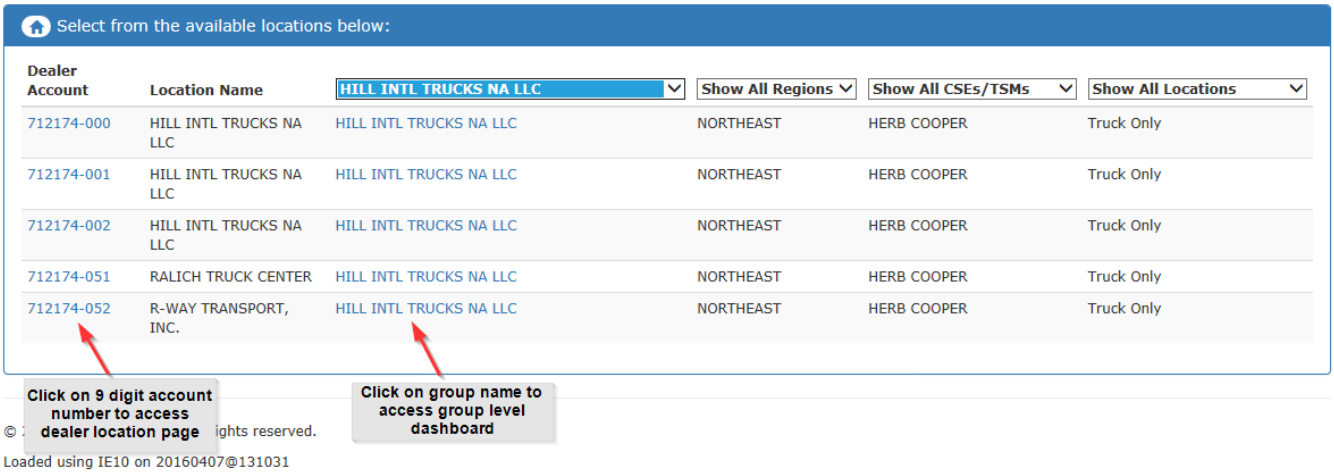


4.1.2. Dashboard Link:

The Dashboard link is: **https://evalue.internationaldelivers.com/occweb/diamondedge/Home**

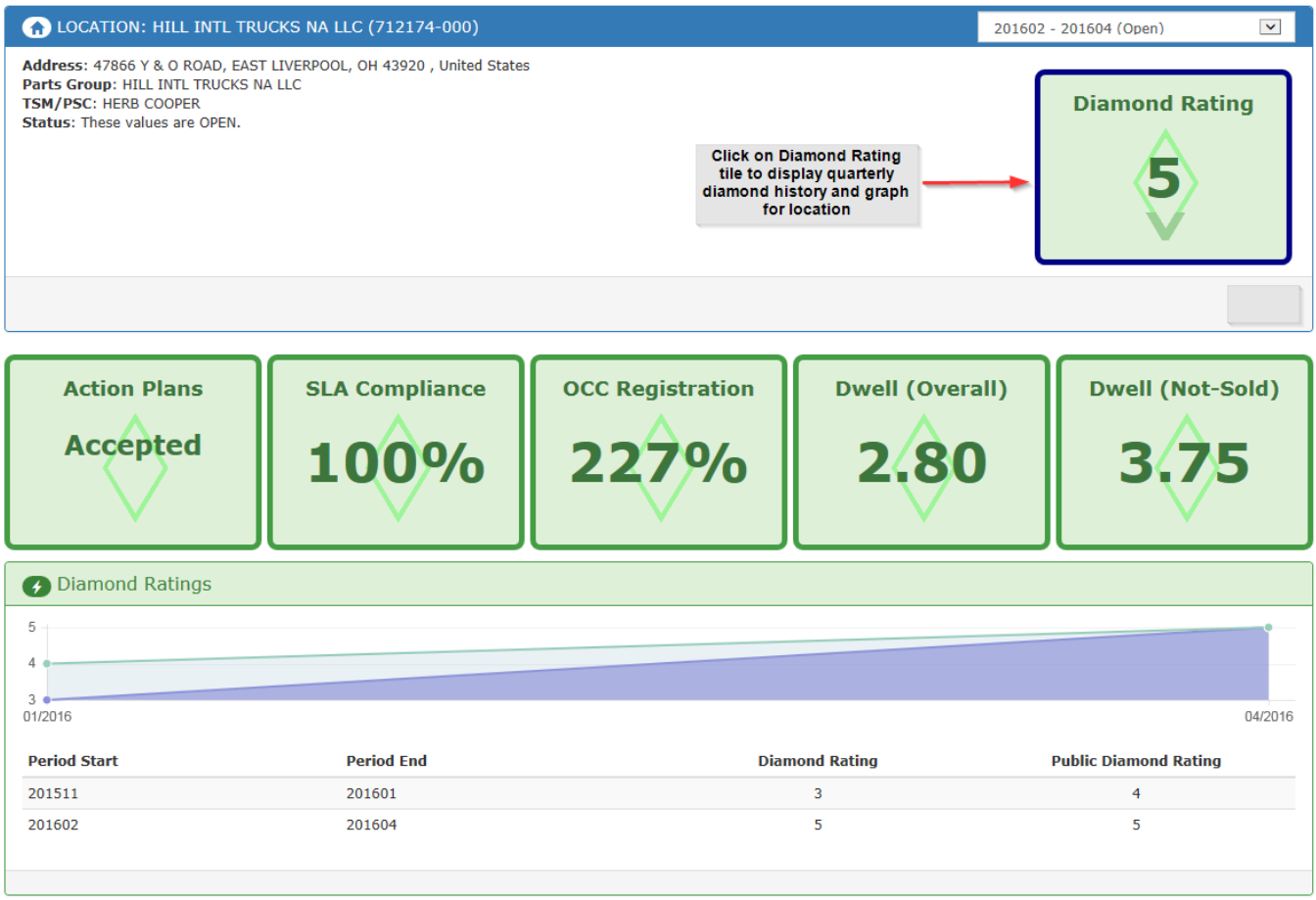
- Users will only see the dealer locations they have rights to access
- Service Managers normally have access to one location
- Service Directors and higher have access to multiple locations
- Clicking on the nine-digit account number takes you to the individual dealer location page
- Clicking on the dealer group name will take you to the group level dashboard

NOTE: You will only see dealers you have access to even when you click on the group level



- Each dashboard tile represents a specific requirement of the program
- Tiles will be green (pass) or gray (fail) based on status of metrics
- Supporting data is displayed in tiles below the report range selection menu
- Clicking on the Diamond Rating tile will display a historic graph of quarterly diamonds achieved

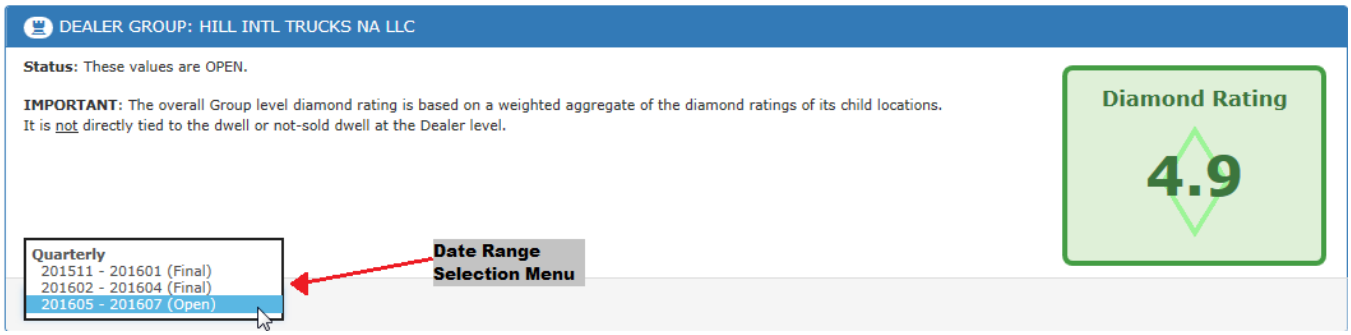
4.1.3. Reporting Tiles



4.1.3.1. Notes

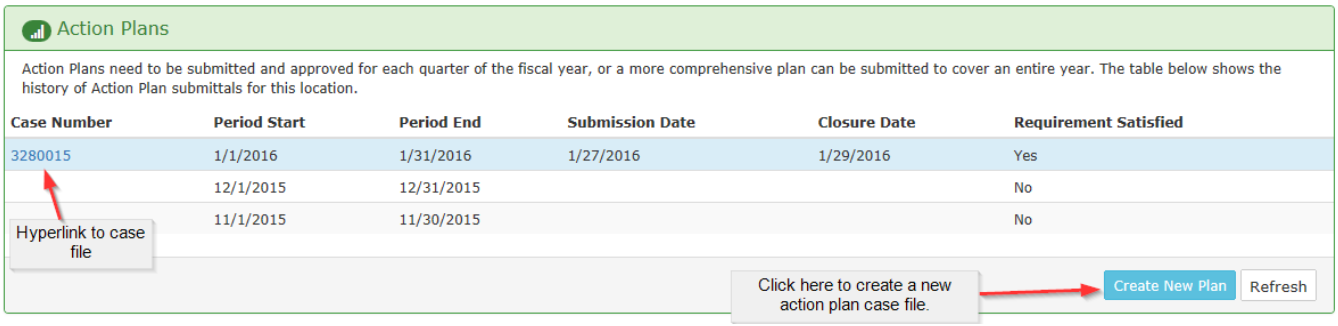
- OCC registrations (first time pings) are not limited to vehicles sold within the period
- First ping from any vehicles ever sold by the dealer location count
- If a parent dealer location (000) sells no trucks in the period and has no first pings, their OCC registration tile will reflect 0%
- If a secondary dealer location sells no trucks and has no first pings in the period, their OCC registration tile will reflect the parent location's score

4.1.4. Choosing a Report Date



- Date range defaults to current quarter
- Specific quarters can be selected from dropdown menu
- Data displayed is only from the date range selected

4.1.5. Action Plan Tile – Summarizes Action Plans Submitted

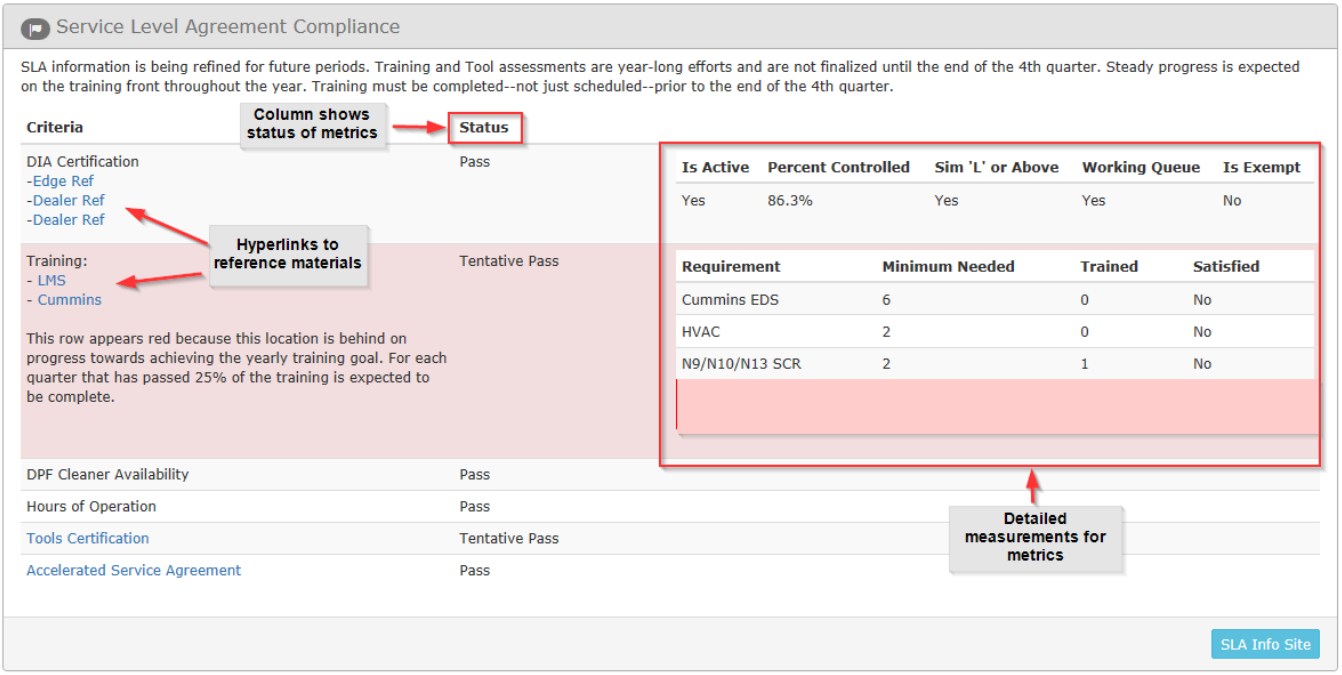


- The tile will reflect action plans that were submitted
- Action plans will be listed by date and will have a hyperlink to the actual case file
- A new action plan can be created by clicking on Create New Plan button in this tile

  * Will redirect to action plan submission page

- Action plans are required each quarter to address processes at the dealership that will improve customer satisfaction and/or dwell time
- Plans are reviewed, modified, and approved through the dealer's field support representative

4.1.6. Service Level Authorization (SLA) Tile – Summarizes Metrics for Compliance



- Tile will reflect data for items during the selected date range
- Hyperlinks in the section link to relevant web sites, reference materials, or Frequently Asked Questions documents

4.1.6.1. DIA (Dealer Inventory Alliance) Certification:

The DIA certification section lists overall status (pass/fail) and the supporting data:

- Is Active: Participating in DIA program
  - Requirement: Yes
- Percent Controlled: Three-month moving average percentage of parts controlled by DIA
  - Requirement: 80% or greater
- Sim level “L” or above: Indicates dealer DIA simulation level
  - Requirement: Sim level “L” or above
- Working Queue: Working queue status: Dealer processed (accepted/rejected/modified) at least two DIA suggested orders per week for three of the four trailing weeks
  - Requirement: Yes
- Hyperlinks in section link to reference materials for the DIA program

4.1.6.2. Training:

Lists technician training requirements and training to date depending on the dealer’s contracts. All training is required to be completed by the end of the fiscal year. This section will show:

- Green – if all training is completed for the fiscal year
- Yellow – if quarterly requirements are met but fiscal total is not met
  - On track but not complete
- Red – if less training is completed than
  - 25% completion by Q1 close
  - 50% completion by Q2 close
  - 75% completion by Q3 close
  - 100% completion by Q4 close
- Hyperlinks in section link to the Navistar or Cummins training pages

4.1.6.3. DPF Cleaner Availability:

- Requirement: Access to any DPF cleaning source within 60 miles /100 kilometers

4.1.6.4. Hours of Operation:

- Requirement: 2015 hours of service maintained. Reduction in hours of service requires preapproval of the appropriate Regional Service Manager

4.1.6.5. Tools Certification:

- Requirement: Annual tool audit to be completed by Navistar field representative or dealer

  Navistar field representative must conduct the audit a minimum of every other year
- Hyperlink on page links to the SLA tooling page, which lists current tool lists for both:
  - Heavy duty dealers
  - Bus and Medium only dealers

4.1.6.6. Accelerated Service Agreement:

- Requirement: Signed accelerated service agreement on file with Navistar
- Hyperlink in section links to the accelerated service agreement form page

4.1.7. OnCommand Connection (OCC) Registration Tile - Summarizes OCC Data

OnCommand Connection Registration

Actual sales and registration numbers are shown below.

Target measurement. Note progressive growth of target.

Period Start	Period End	VINs Sold	VINs Registered	Target %	Actual %	Requirement Satisfied
3/1/2016	3/1/2016	1	5	15%	500%	Yes
2/1/2016	2/1/2016	0	10	15%	1000%	Yes
1/1/2016	1/1/2016	7	5	10%	71%	Yes
12/1/2015	12/1/2015	13	82	10%	631%	Yes
11/1/2015	11/1/2015	30	151	10%	503%	Yes

Refresh

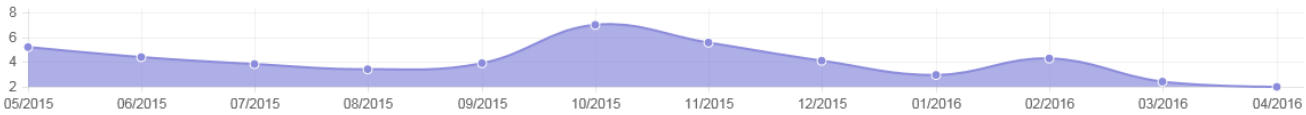
- Tile will reflect data on VINs Sold during the period and first time pings into the OnCommand Connection system for any vehicle ever sold by the dealer
- Due to the timing between DTU and first ping, it is possible to achieve over 100% for this measurement.
- Requirements:
  - Q1 10% OCC registrations (first ping) vs. vehicles sold in the period
  - Q2 15% OCC registrations (first ping) vs. vehicles sold in the period
  - Q3 20% OCC registrations (first ping) vs. vehicles sold in the period
  - Q4 25% OCC registrations (first ping) vs. vehicles sold in the period

4.1.8. Dwell (overall and not-sold) Tile - Summarizes Claim Data

Overall Dwell

Overall Dwell is a reflection of the average amount of time each vehicle spent at this location, based on claims processed during the selected period. A value of 'NV' reflects the fact that no vehicles were serviced at this location during this period.

Claims that exceed the threshold are marked in orange. Claims that exceed the threshold by more than double are marked in red.



VIN	Sold Here	RO Open Date	RO Complete Date	Claim Days	Details
1HSDJAPR5GH733687	Yes	2/10/2016	2/11/2016	1	

Claim #	RO Open Date	RO Complete Date	Process Date	Warranty Code	Odometer
252898	2/10/2016	2/11/2016	3/1/2016	01	69,642 K

VIN	Sold Here	RO Open Date	RO Complete Date	Claim Days	Details
1HSHXSNR9FH508051	No	2/4/2016	2/4/2016	1	

Claim #	RO Open Date	RO Complete Date	Process Date	Warranty Code	Odometer
252866	2/4/2016	2/4/2016	2/10/2016	01	207,880 K

VIN	Sold Here	RO Open Date	RO Complete Date	Claim Days	Details
1HTGSSJT3BJ386829	Yes	2/17/2016	2/18/2016	1	

Claim #	RO Open Date	RO Complete Date	Process Date	Warranty Code	Odometer
252952	2/17/2016	2/18/2016	2/23/2016	01	151,370 K

- Tile will reflect warranty claims used to calculate dwell times recorded during the selected date range
- 12 month historical graph displays trends
  - Requirements: Less than 5 days

Dwell is calculated by the following method:

1. Warranty code 01, 39, and 40 only
2. Remove Bus claims for non IC bus only dealers
3. Eliminate multiple sections and claims for the same VIN & fail dates
4. Multiple claims that have overlapping dates, or are contiguous for a specific dealer and VIN
   - The earliest fail date and last complete date will be used to calculate the claim days
5. For dealer locations taken over, claims are carried over from previous dealer info to new dealer location
6. Claim days are recorded in the month they are processed in by Navistar Inc.

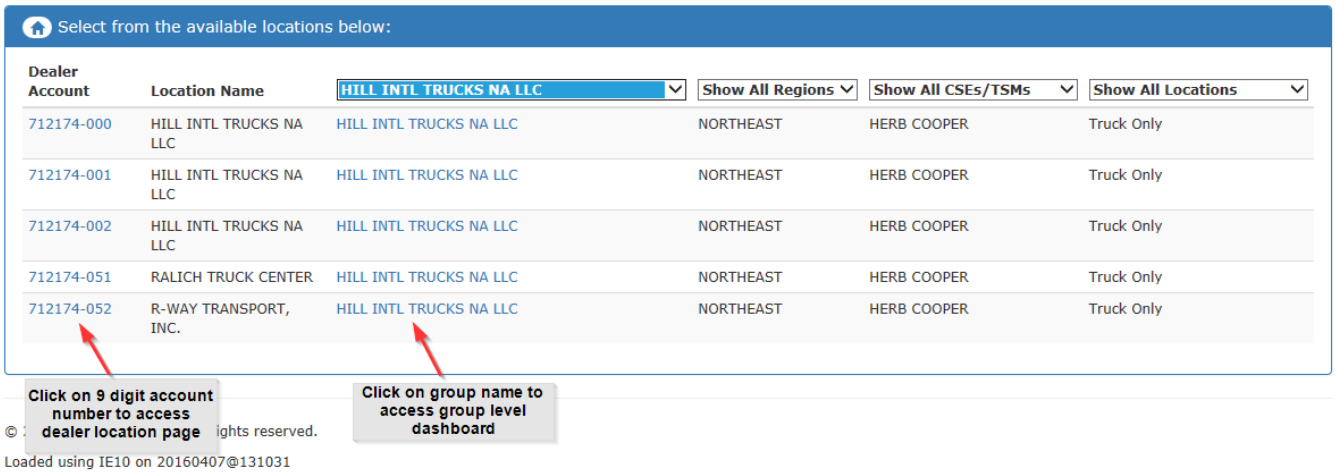
7. If complete date minus fail date is 0, claim days = 1
8. Average claim days = total claim days divided by the total number of claim
9. Dealer is identified by the 9 digit location/account
10. DO NOT INCLUDE THE FOLLOWING CLAIMS

    Claim with ZERO $ on Parts or Labor are excluded when calculating "Claim Days"

4.1.9. Diamond Edge Level

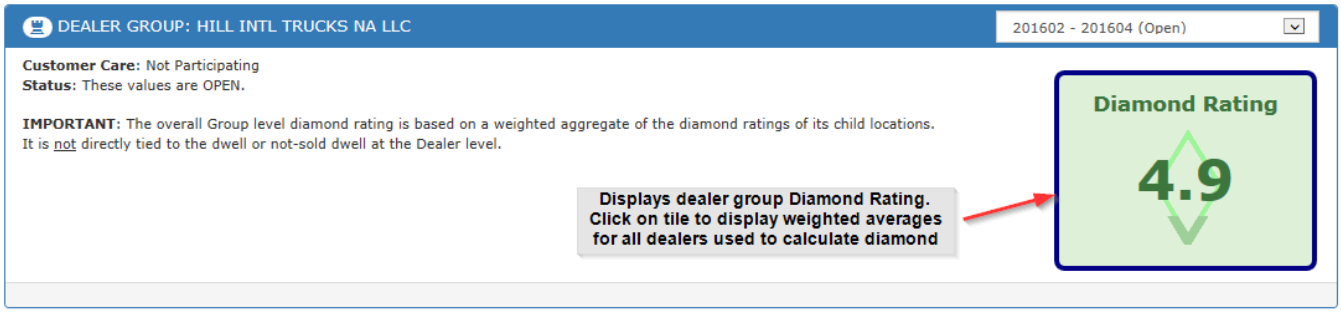
4.1.9.1. Diamond Edge Group Level Dashboard

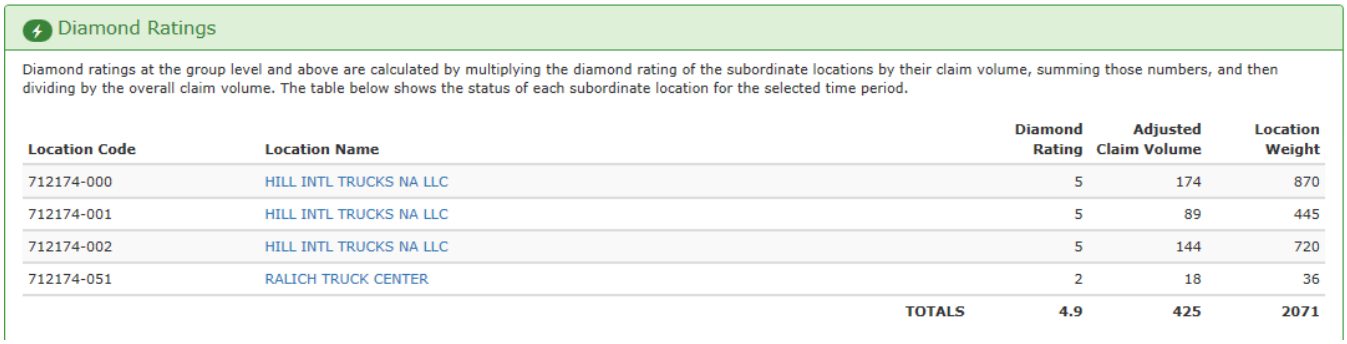
- Users will only see the dealers they have access to
- Service managers normally have access to one location
- Service directors and up have access to multiple locations
- Clicking on the account number will take you to the individual dealer page
- Clicking on the dealer group name will take you to the group level dashboard
- NOTE: you will only see dealers you have access to even when you click on the group level



4.1.9.2. Dealer Group Diamond Rating

- The dealer group diamond rating tile shows data and calculations for determining the dealer group diamond level
- Specific information for each dealer can be found by clicking on the individual dealer hyperlinks
- Dealer groups who achieve 4 or 5 diamonds are eligible for Customer Care funds depending on progress towards their parts sales goals





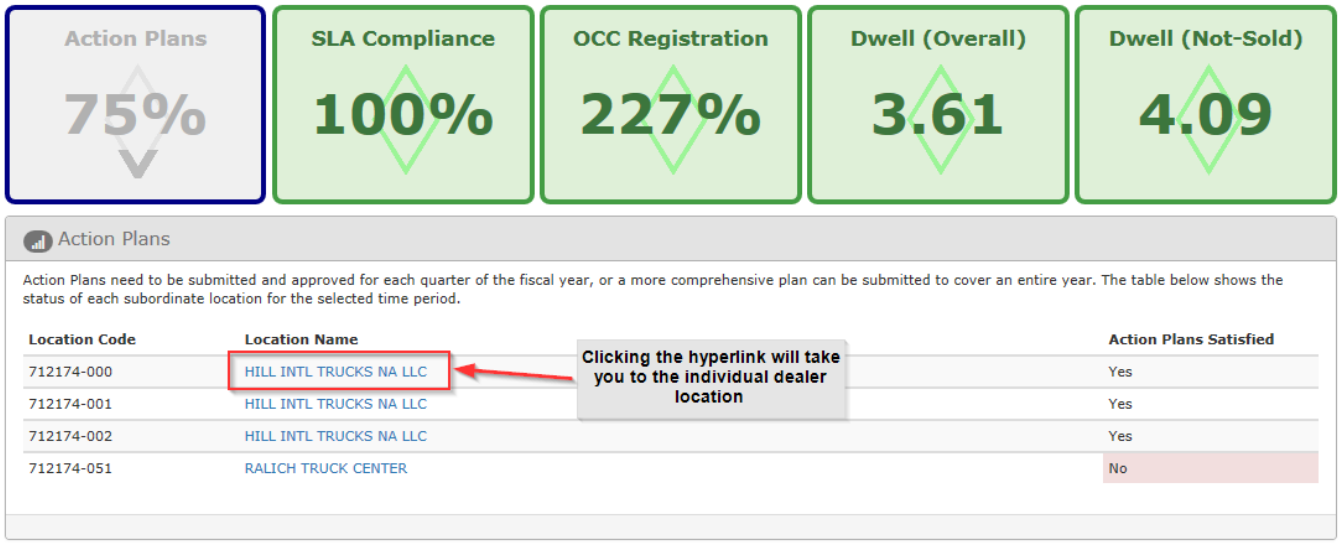
Diamond Ratings

Diamond ratings at the group level and above are calculated by multiplying the diamond rating of the subordinate locations by their claim volume, summing those numbers, and then dividing by the overall claim volume. The table below shows the status of each subordinate location for the selected time period.

Location Code	Location Name	Diamond Rating	Adjusted Claim Volume	Location Weight
712174-000	HILL INTL TRUCKS NA LLC	5	174	870
712174-001	HILL INTL TRUCKS NA LLC	5	89	445
712174-002	HILL INTL TRUCKS NA LLC	5	144	720
712174-051	RALICH TRUCK CENTER	2	18	36
	TOTALS	4.9	425	2071

4.1.9.3. Dealer Group Action Plan

- Displays action plan metrics for all dealers in the group
- Specific information for each dealer can be found by clicking on the individual dealer hyperlinks



4.1.9.4. Dealer Group SLA – Displays SLA Metrics for All Dealers in the Group

- Specific information for each dealer can be found by clicking on the individual dealer hyperlinks
- **NOTE:** An * in the satisfied column indicates a metric that has a completion deadline of October 31, 2016 (tentative pass)

Service Level Agreement Compliance

SLA information is being refined for future periods. Training and Tool assessments are year-long efforts and are not finalized until the end of the 4th quarter. Steady progress is expected on the training front throughout the year. Training must be completed--not just scheduled--prior to the end of the 4th quarter.

NOTE: The LMS data feed is not active at this time, so the results are not reflective of actual achievements.
NOTE: Tools certification is preliminary and should not be considered definitive while this message is visible.

Quick view of all dealer's status on the SLA metrics

Location Code	Location Name	DIA	Training	DPF	Hours Of Operation	Tools	Accelerated Service Agreement	SLA Satisfied
712174-000	HILL INTL TRUCKS NA LLC	Yes	*	Yes	Yes	*	Yes	Yes
712174-001	HILL INTL TRUCKS NA LLC	Yes	*	Yes	Yes	*	Yes	Yes
712174-002	HILL INTL TRUCKS NA LLC	Yes	*	Yes	Yes	*	Yes	Yes
712174-051	RALICH TRUCK CENTER	NA	*	Yes	Yes	*	Yes	Yes

4.1.9.5. Dealer Group OCC – Displays OCC Metrics for all Dealers in the Group

- Specific information for each dealer can be found by clicking on the individual dealer hyperlinks
- **NOTE:** An * in the satisfied column indicates a location is mirroring the parent locations data

OnCommand Connection Registration

Actual sales and registration numbers are shown below.

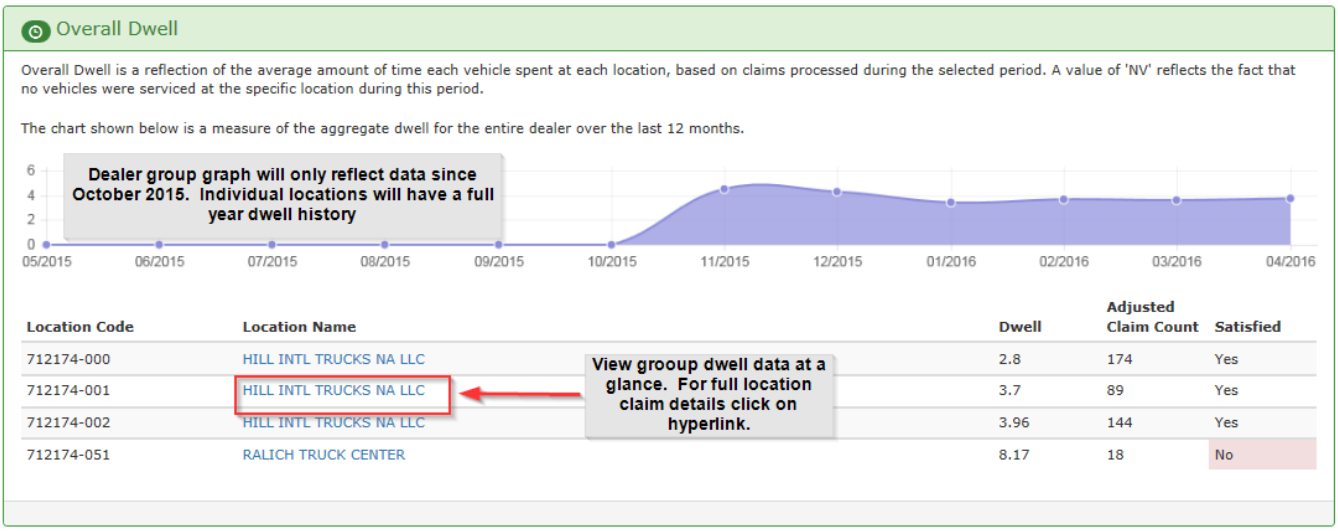
* - The sold/registered counts for the specified location are a reflection of the numbers at the primary location, as the specified location did not have any sales or registrations of it's own during the period in question.

View dealer group OCC data metrics

Location Code	Location Name	VINs Sold	VINs Registered	Satisfied
712174-000	HILL INTL TRUCKS NA LLC	41	85	Yes
712174-001	HILL INTL TRUCKS NA LLC	0	0	Yes*
712174-002	HILL INTL TRUCKS NA LLC	0	0	Yes*
712174-051	RALICH TRUCK CENTER	0	0	Yes*

4.1.9.6. Dealer Group Dwell – View All Dealers

- Either tile will display location dwell times, claim count, and a pass or fail rating for each dealer location
- Group dwell graph will only reflect data since Oct. 2015
- Specific information for each dealer can be found by clicking on the individual dealer hyperlinks



Location Code	Location Name	Dwell	Adjusted Claim Count	Satisfied
712174-000	HILL INTL TRUCKS NA LLC	2.8	174	Yes
712174-001	HILL INTL TRUCKS NA LLC	3.7	89	Yes
712174-002	HILL INTL TRUCKS NA LLC	3.96	144	Yes
712174-051	RALICH TRUCK CENTER	8.17	18	No

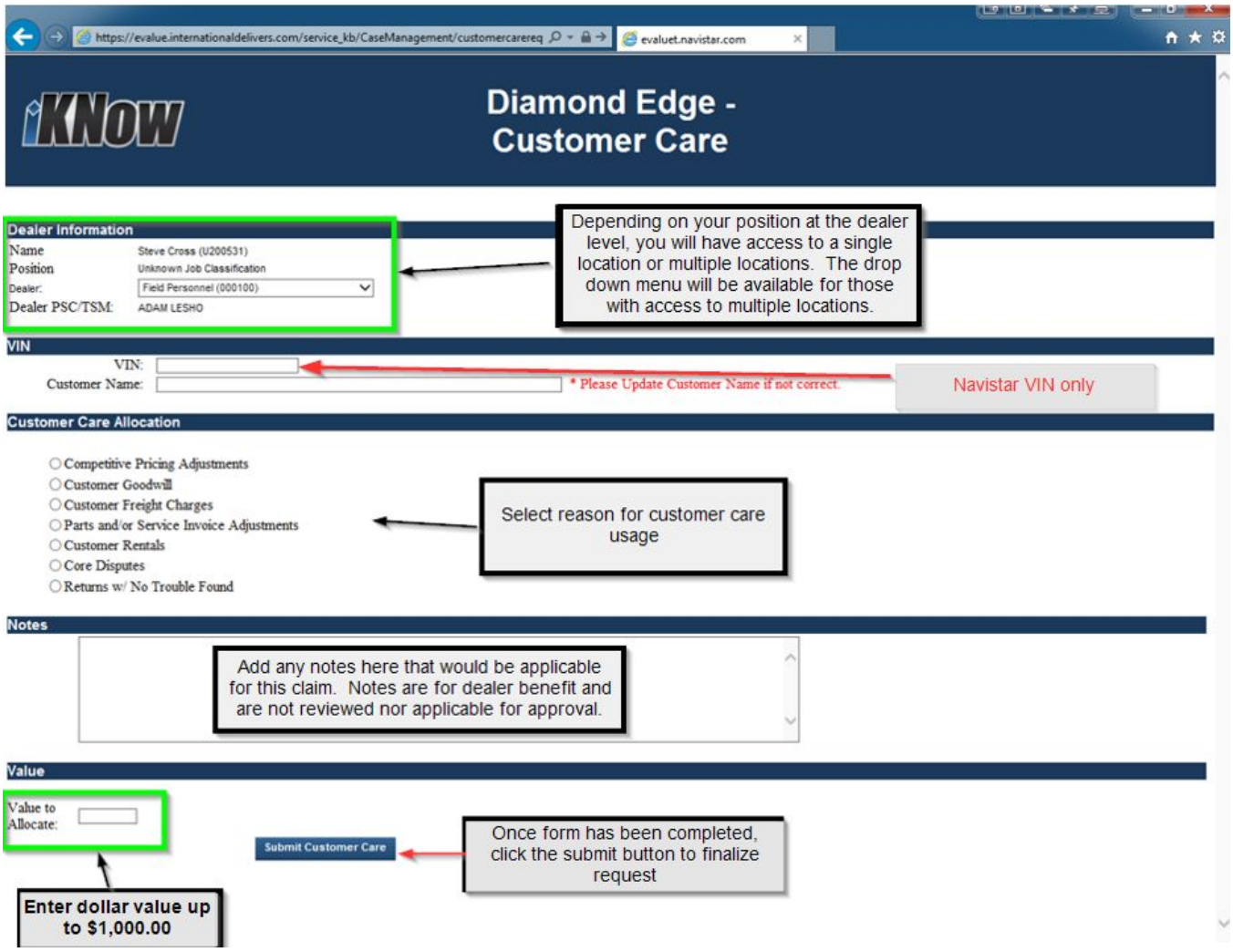
4.1.10. Customer Care Funds Usage

Customer Care funds are available to those dealer groups who achieve their Dwell Time and Parts Growth goal targets. These benefits will be accessible for use beginning on the 15th of the month following the quarter close.

These funds will be available at the Customer Care Screen shown below:

Customer Care Funds

Once you access the site, complete the page below to use funds. Funds are auto approved up to the amount earned by the dealer group for the quarter and must be utilized within 12 months.



4.1.11. Customer Care FAQ

How will the dealers be notified of what funds have been earned?

E-mail notification will be sent to parts management personnel by the 15th of the month following the quarter close detailing the amounts of funds that have been earned. The e-mail notice will also include any carryover amount unused from the previous quarter. There is also a twice weekly e-mail sent outlining where the dealer is in relation to meeting their parts sales target.

How long are funds available for use?

Allocated funds are processed in chronological order and must be utilized within 12 months. Example: If funds became available on February 15, 2016, they must be utilized by February 14, 2017.

When will notification be sent that submitted funds have been accepted?

All requested funds case files are closed upon submission. The cases can be searched from the iKNow home page.

Is there a limit to how much of the funds can be utilized at one time?

The maximum amount of funds that can be requested at one time is $1,000.00 per customer, per incident. Example: If a customer has a repair issue, up to $1,000.00 can be used for the repair once. Multiple requests cannot be made for the same repair event. If the dealer chooses to use funds on a future but different repair for the same customer, that is acceptable.

How will the dealer be paid for the funds that have been requested / used?

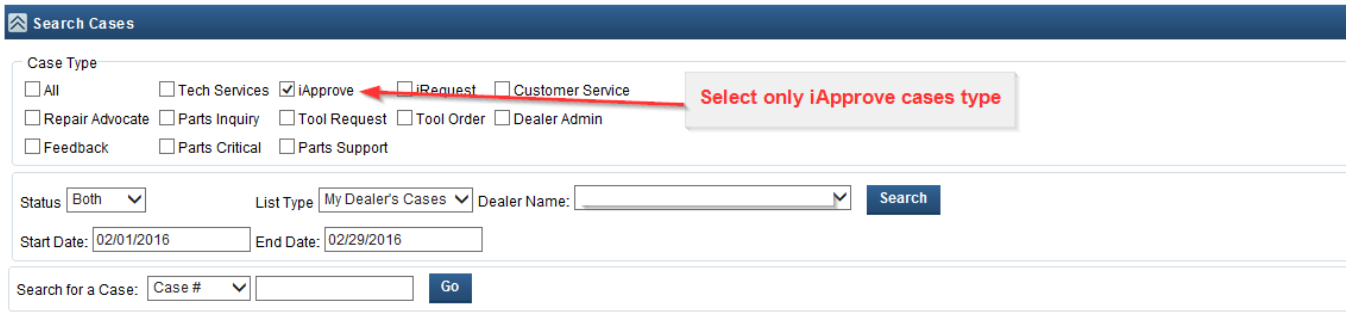
Once the used funds have been documented, a journal entry will credit the Dealer Account Statement in the subsequent month for all requests recorded during the previous month up to the dealer's available funds.

Is there a notification to tell dealers when they have utilized all allocated customer care funds?

It is the responsibility of the dealer group to track customer care fund usage. A monthly statement will be sent detailing the total amount that has been used.

How will the dealer be able to track the funds that have been used?

A monthly summary will be sent to dealers who have earned funds detailing the total amount that has been used for the month. Customer Care fund requests made by the dealer can be found using the search cases function on the iKNow home page and selecting iApprove cases. Ensure the status is set as **both** and the proper date range is selected.

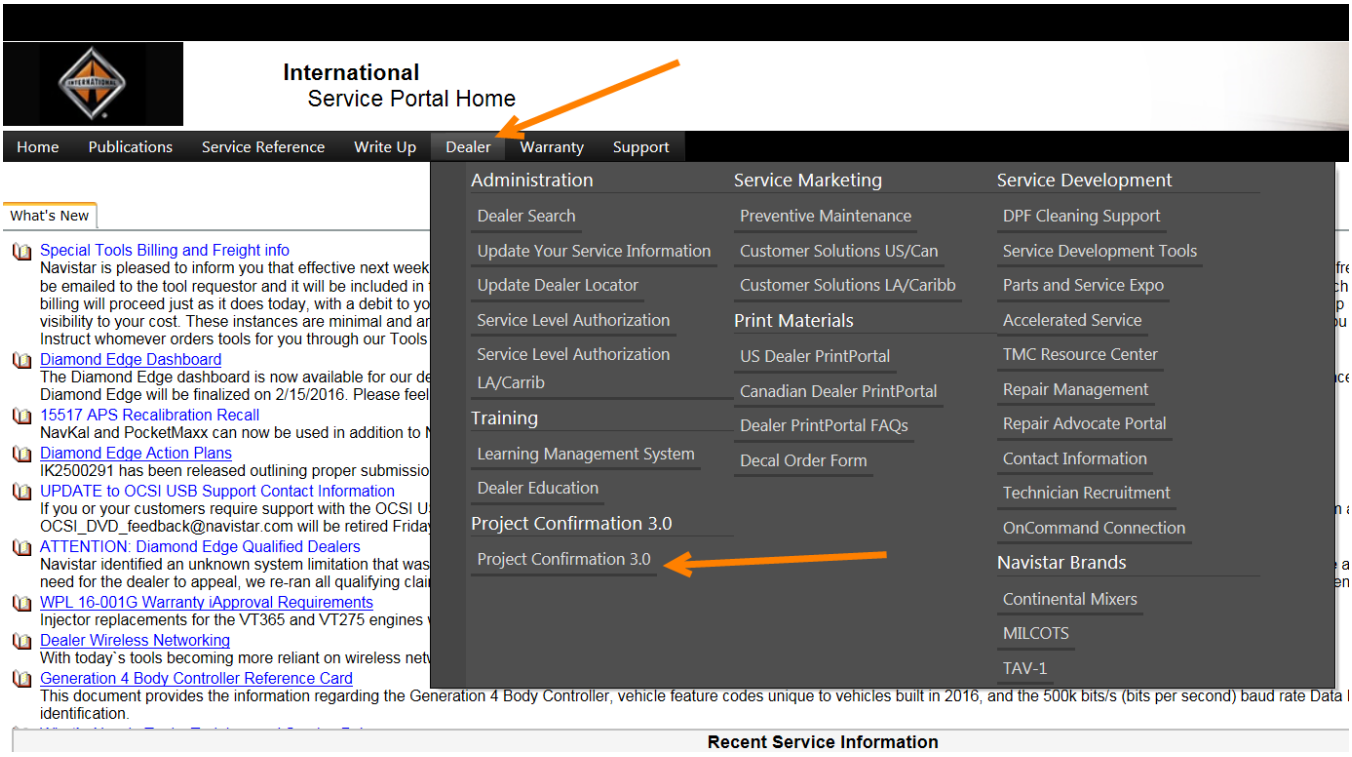


4.2. QUICK REFERENCE GUIDE TO PROJECT CONFIRMATION 3.0 RESOURCE CENTER

1. Go to the International® Service Portal™ Home Page.

   https://evalue.internationaldelivers.com/service/service_info/welcome.aspx

2. Move mouse pointer over “Dealer” and a list will appear. Scroll down and select “Project Confirmation 3.0.”



The Project Confirmation 3.0 Resource Center is a great source for:

a. Six Steps sheets or posters

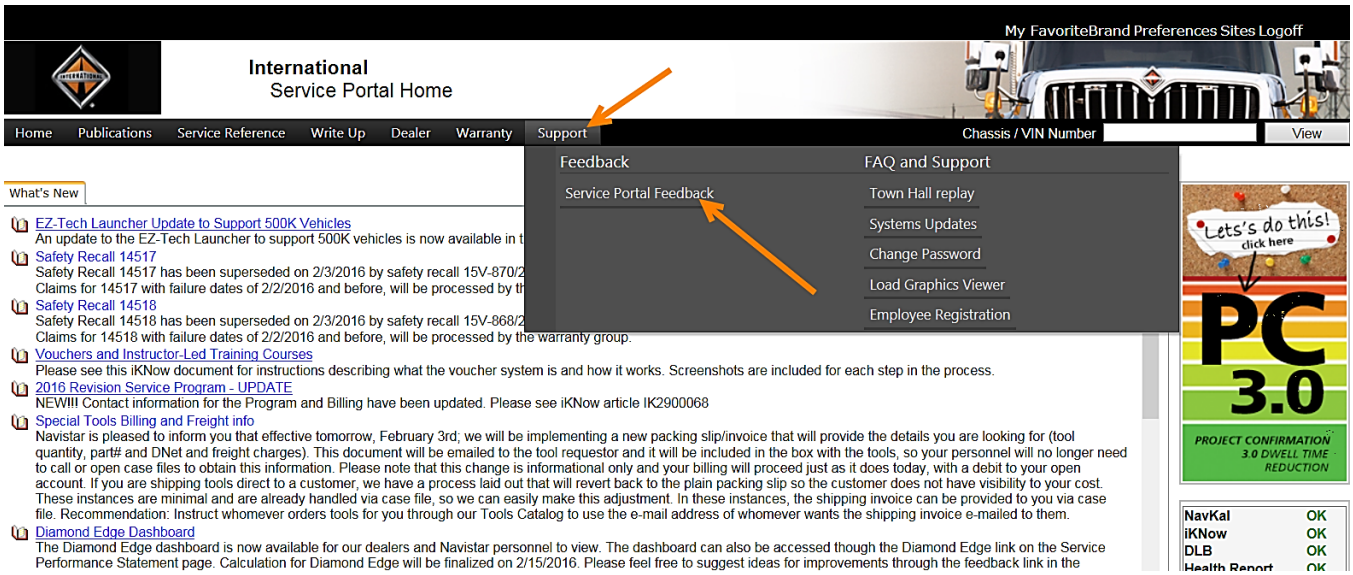
b. Best practices

4.3. QUICK REFERENCE GUIDE TO SUBMITTING FEEDBACK

1. Go to the International® Service Portal™ Home Page

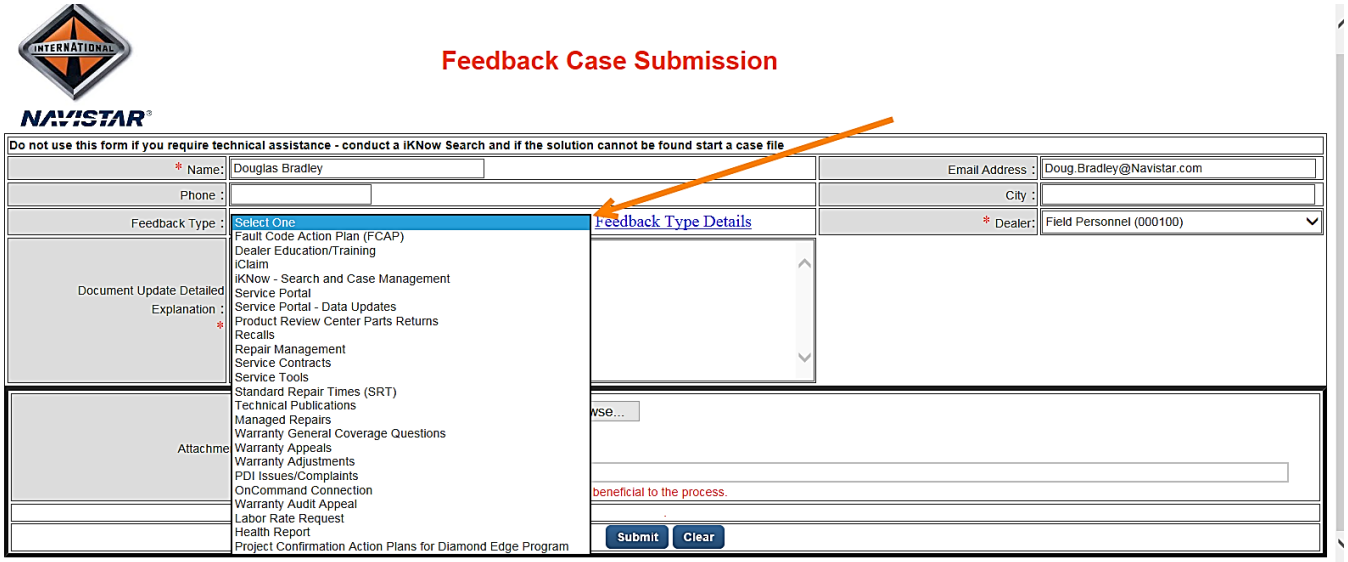
   https://evalue.internationaldelivers.com/service/service_info/welcome.aspx

2. Move mouse pointer over “Support” and a list will appear. Scroll down and select “Service Portal Feedback”



3. Select “Feedback Type details”

4. Fill out form and submit

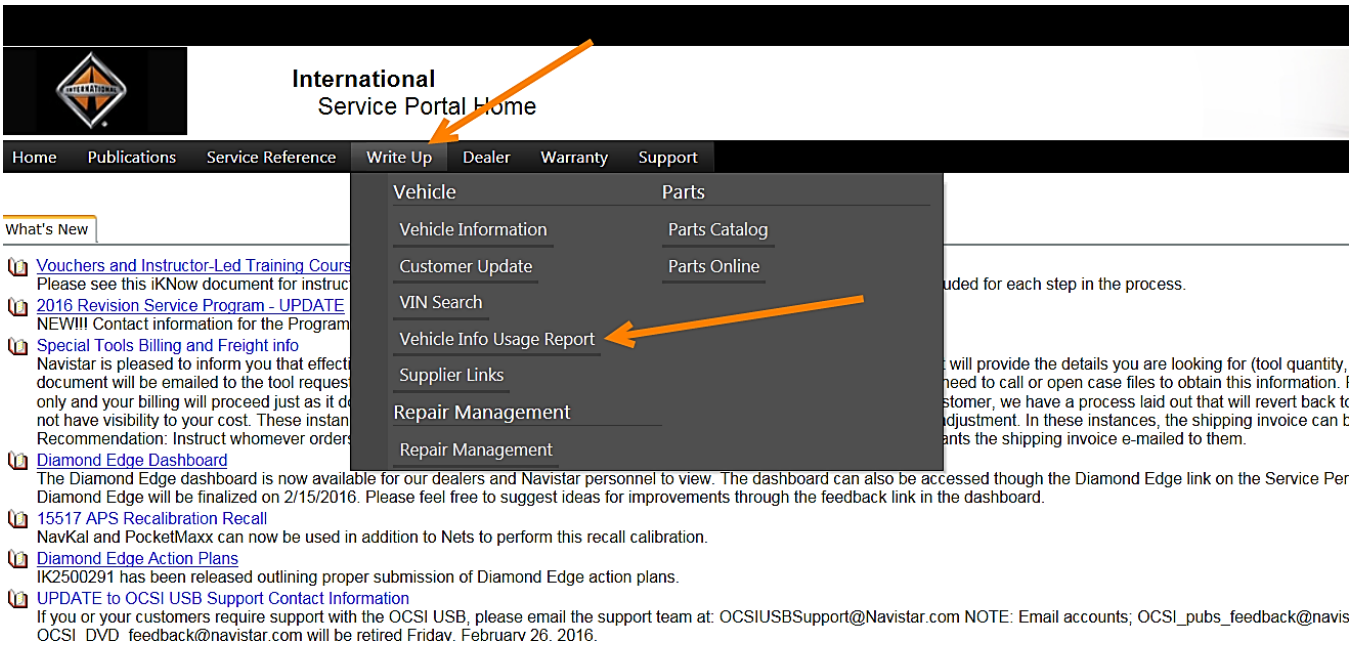


4.4. QUICK REFERENCE GUIDE TO VEHICLE INFO USAGE REPORT

1. Go to the International® Service Portal™Home Page

   https://evalue.internationaldelivers.com/service/service_info/welcome.aspx

2. Move mouse pointer over “Write Up” and a list will appear. Scroll down and select “Vehicle Info Usage Report”

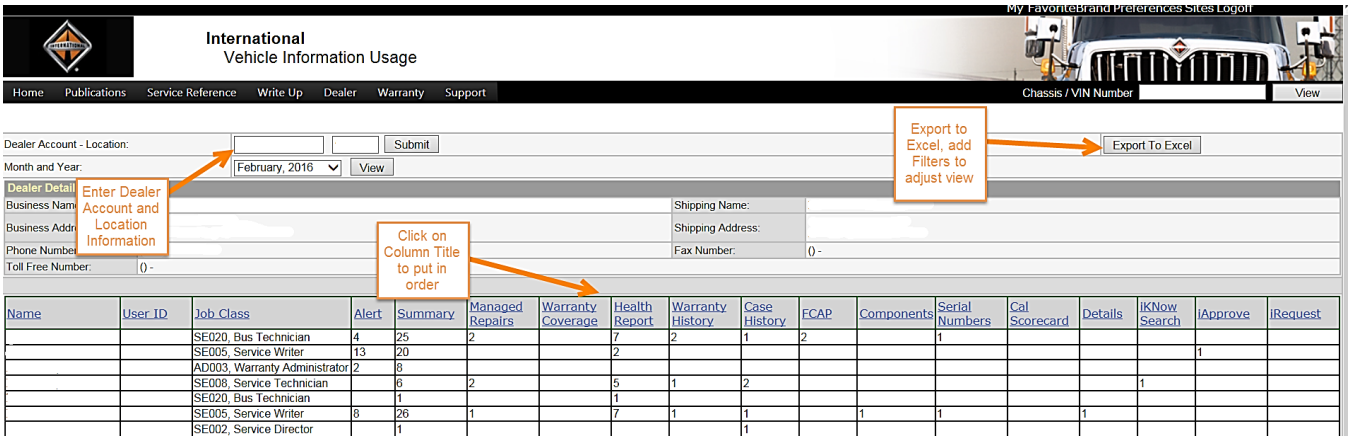


3. Enter “Dealer Account and Location” and click “Submit”

4. Select the “Month and Year” you wish to view

You can click on the title of a column to put in order **or**

Export to Excel, add filters and adjust view to the subject or information you wish to view

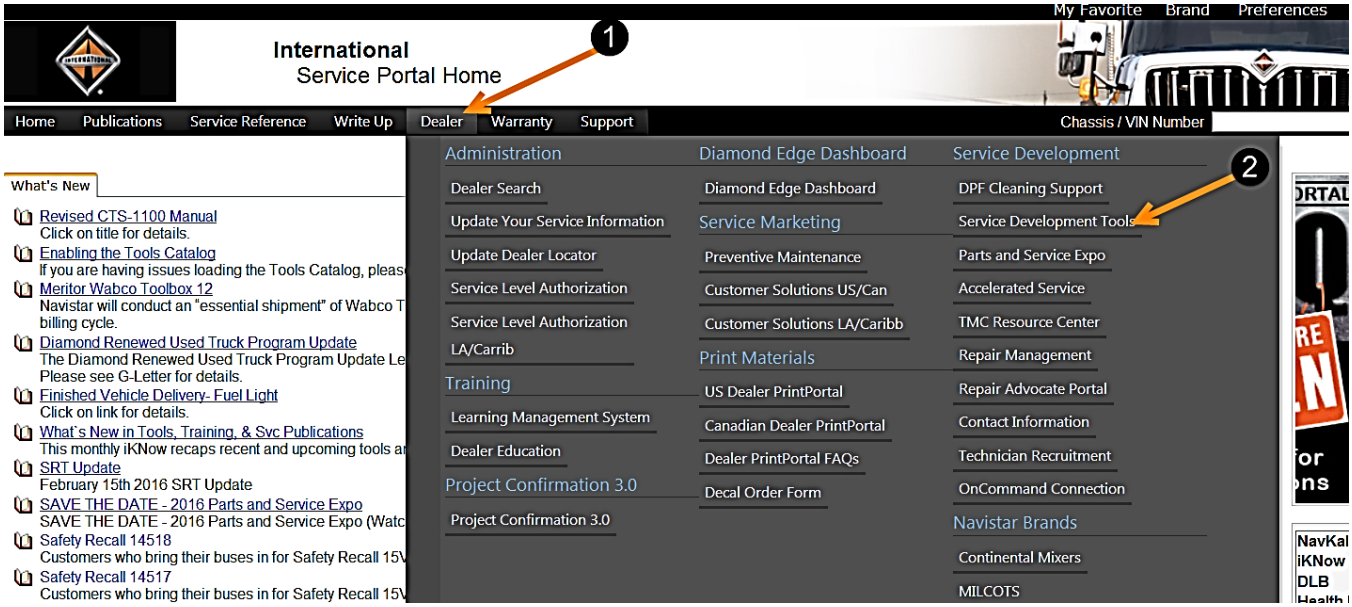


4.5. QUICK REFERENCE GUIDE TO SERVICE CENTER OPERATING FORMS

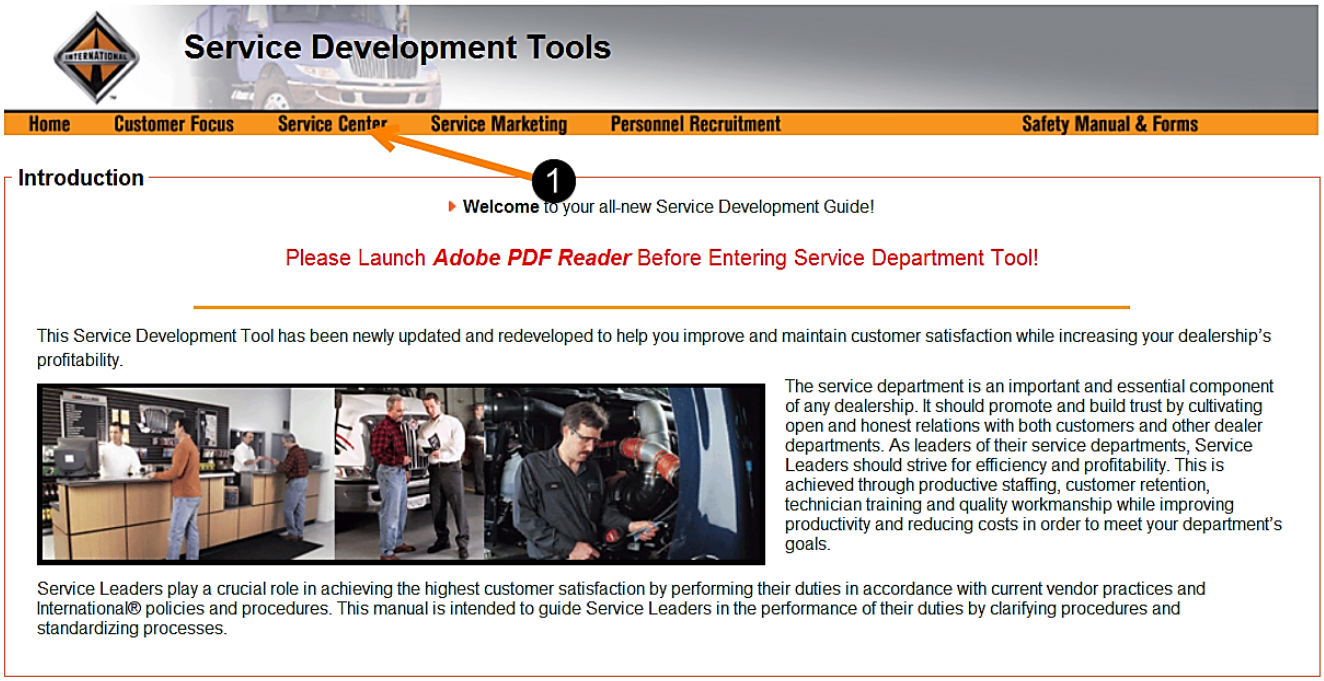
1. Go to the International® Service Portal™ Home Page

   https://evalue.internationaldelivers.com/service/service_info/welcome.aspx

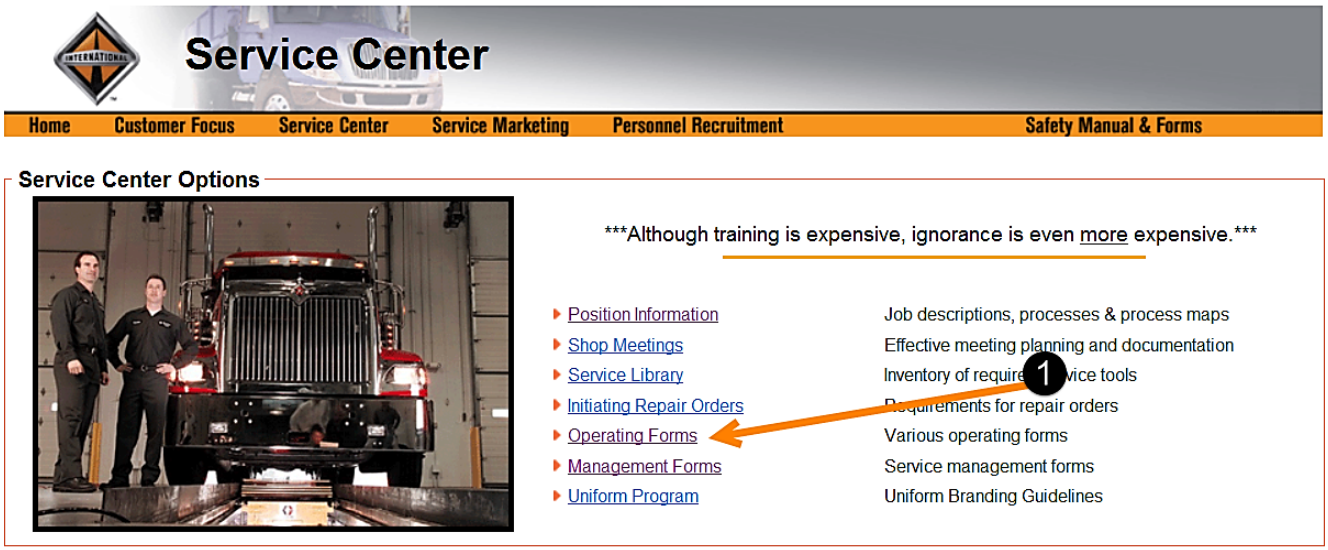
2. Move mouse pointer over “Dealer” and a list will appear. Scroll down and select “Service Development Tools”



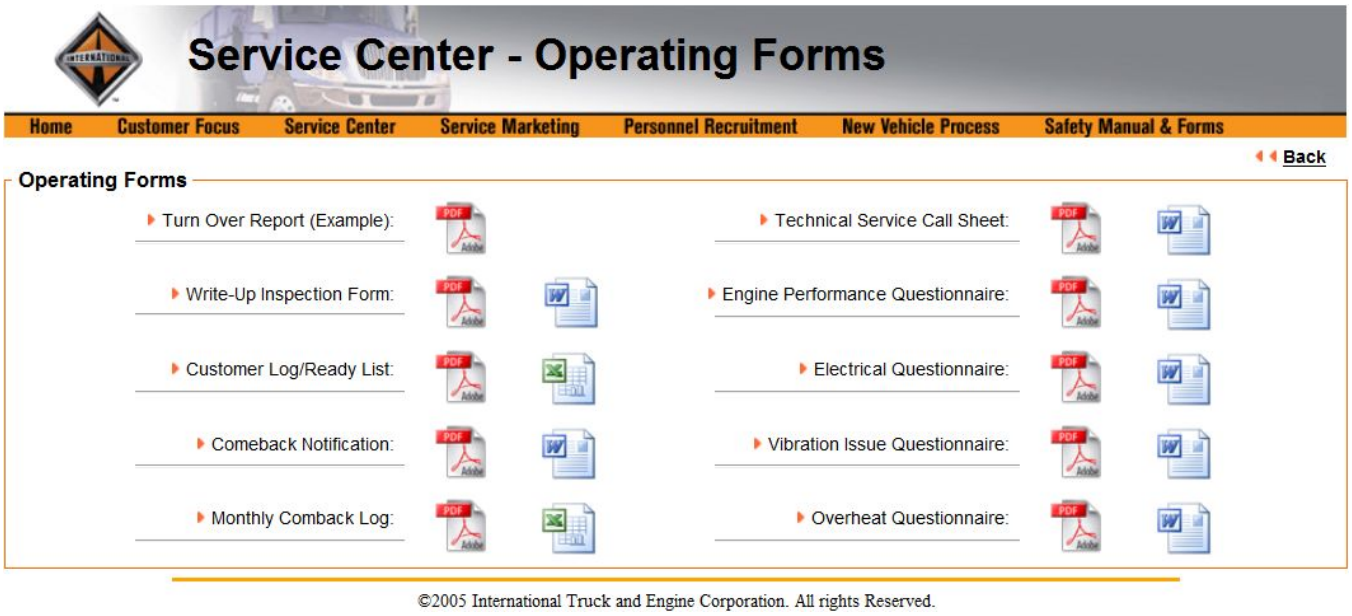
3. Select “Service Center”



4. Select “Operating Forms”



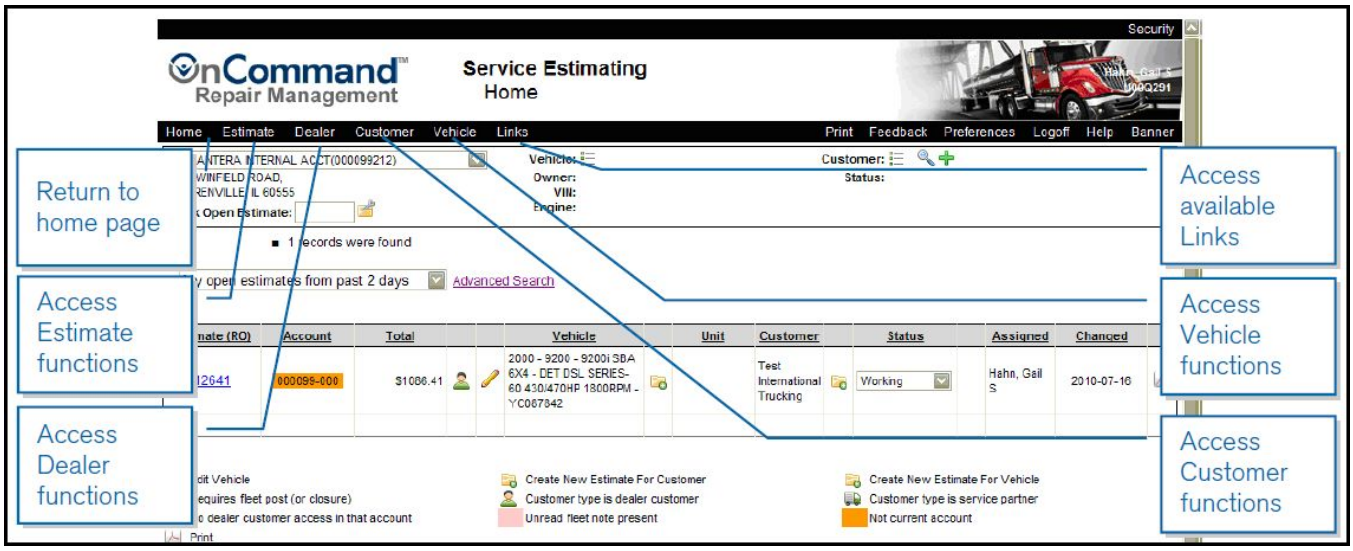
5. Select appropriate form



4.6. QUICK START GUIDE FOR SERVICE ESTIMATING

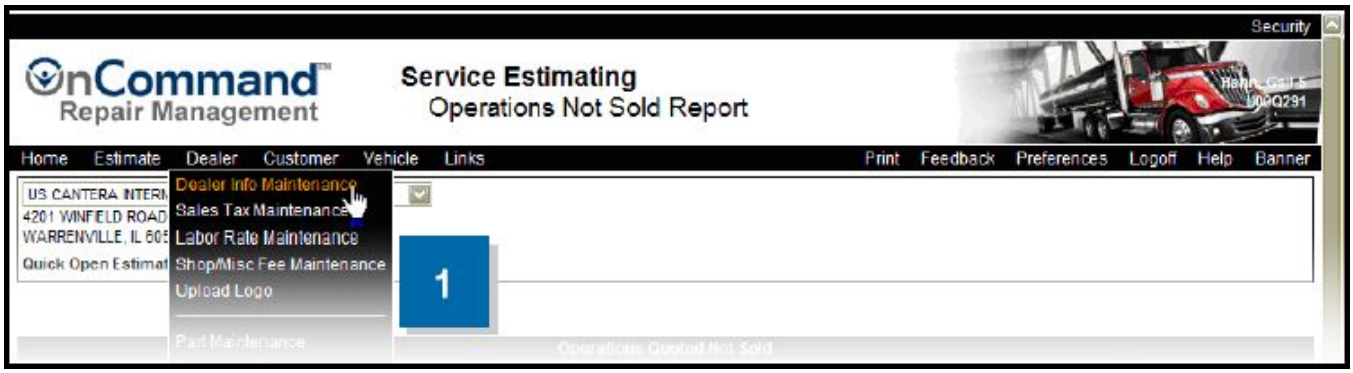
4.6.1. Getting Started

When you sign into OnCommand, you will see the Service Estimating home screen. From here you can:



4.6.2. Managing My Dealer Information

1. Select Dealer Info Maintenance from the Dealer drop-down menu

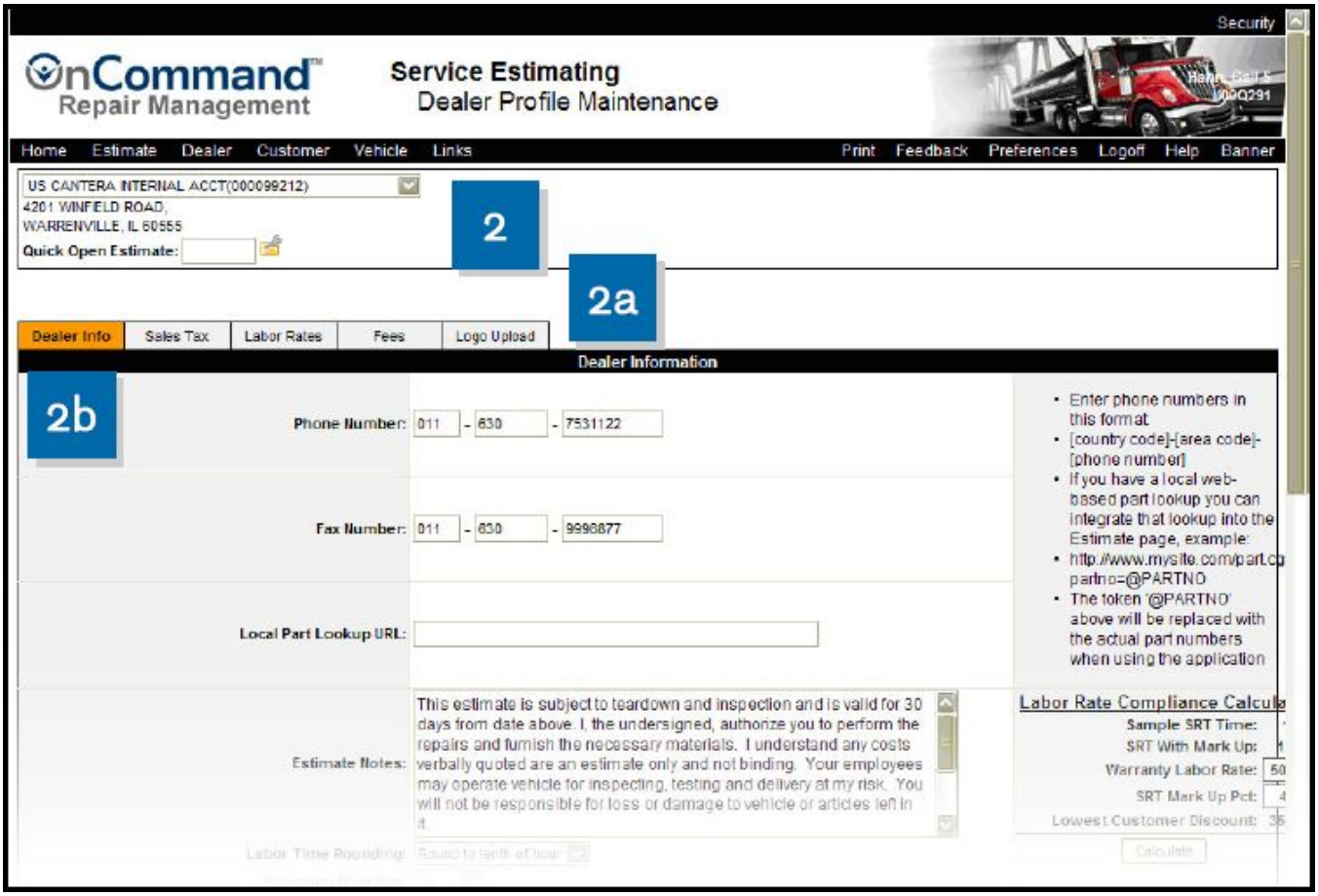


2. The Dealer Profile Maintenance screen allows you to enter and edit your dealership profile. In the Dealer Profile header, you will find your dealership code and address

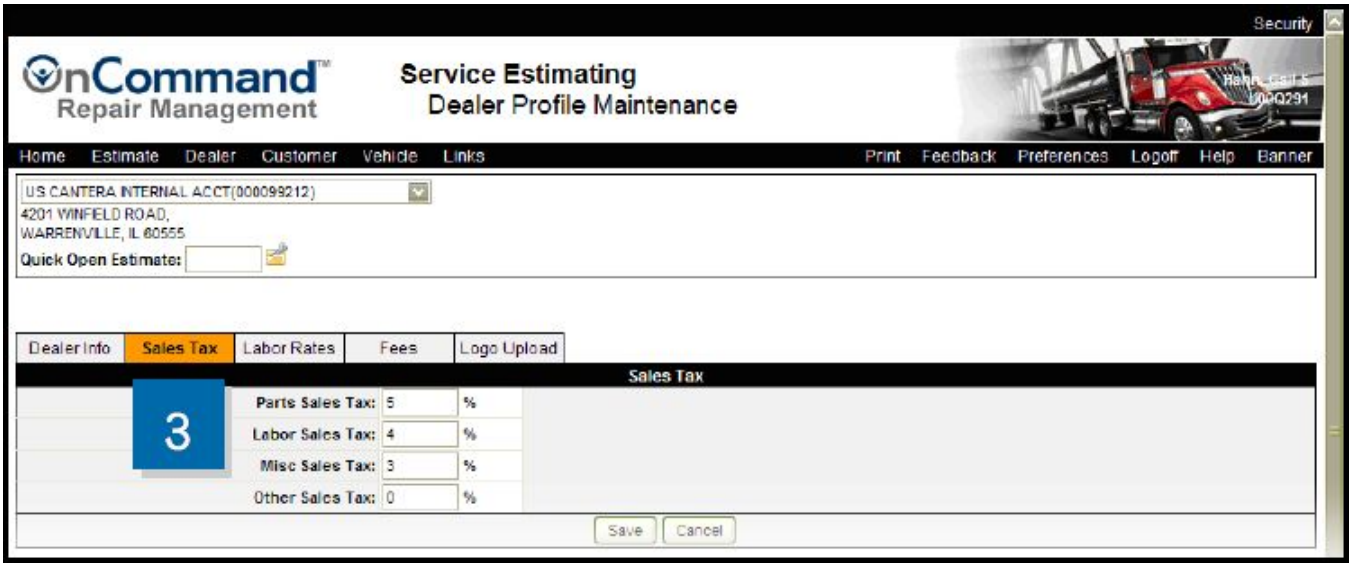
   If you have more than one dealership to administer, select the correct dealer from the drop-down list

   2a. This screen has five tabs: Dealer Info, Sales Tax, Labor Rates, Fees, and Logo Upload

   2b. On the Dealer Info tab, you can add or change dealer information such as your dealer's fax number, customized estimate notes, and labor time options

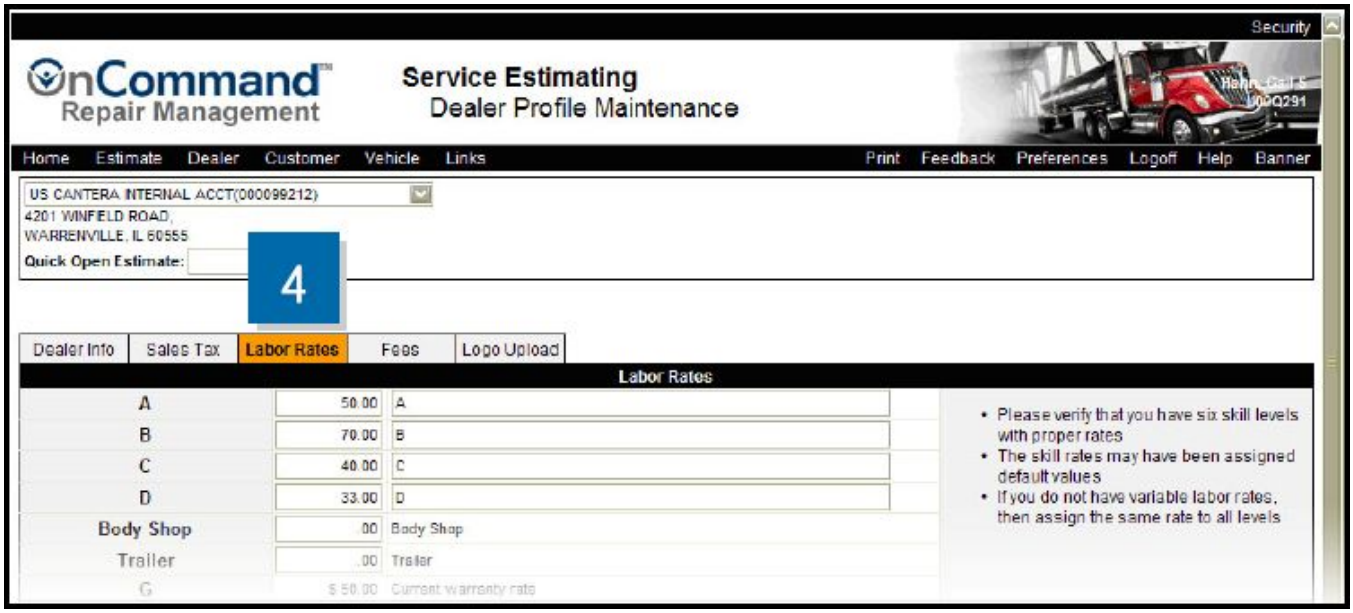


3. Click on the Sales Tax tab to change sales tax rates. Only the fields applicable to your dealership should be entered; the others should remain at 0. Other Tax is applied when a fixed price operation does not include tax.

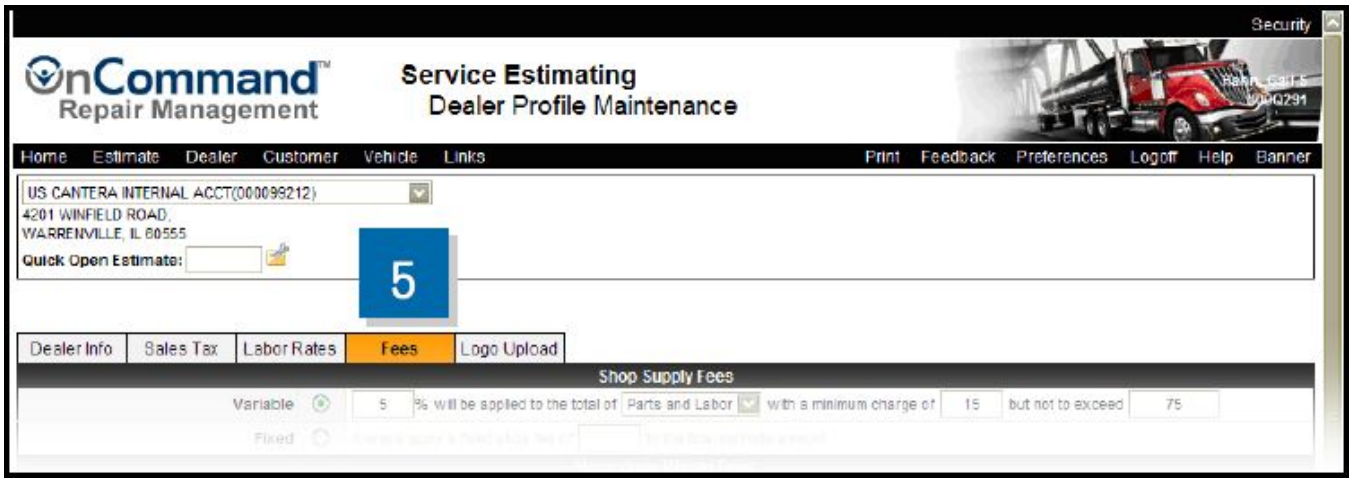


4. Click on the Labor Rates tab to assign descriptions and labor rates for different skill sets. These labor rates are the default rates; they will be effective for estimates to all customers that do not have a customer-specific labor rate.

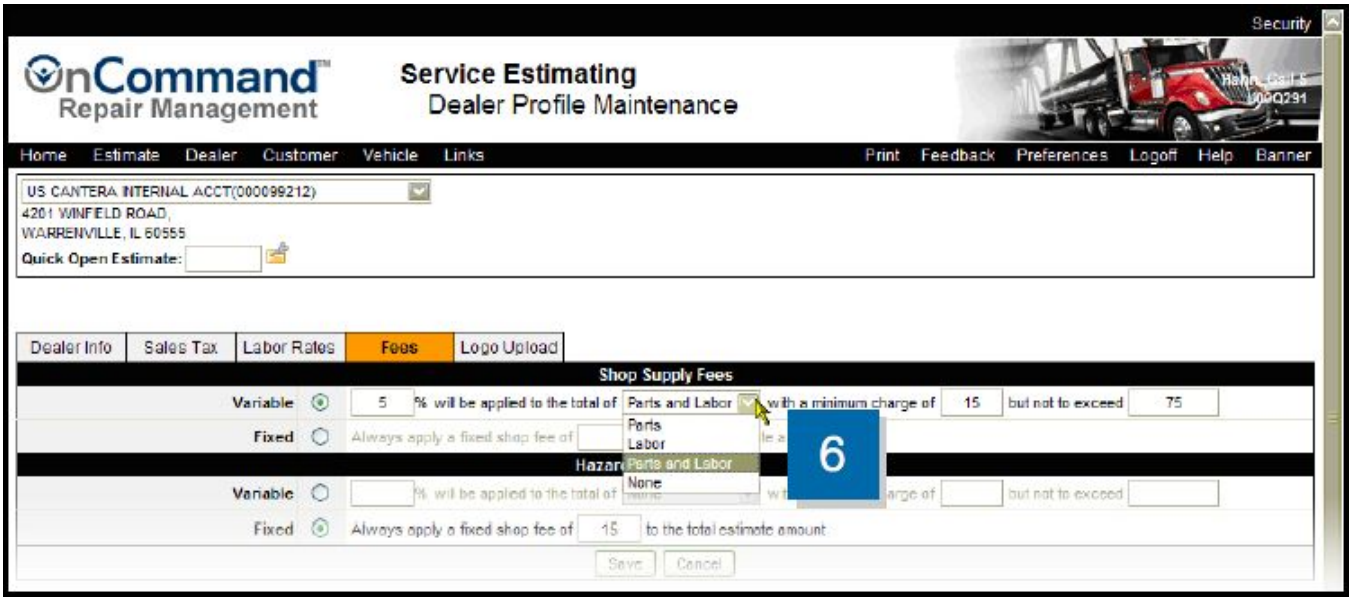
   If your dealership does not use variable labor rates, all should be set at the same rate



5. Click on the Fees tab to manage the shop fees that are displayed on estimates



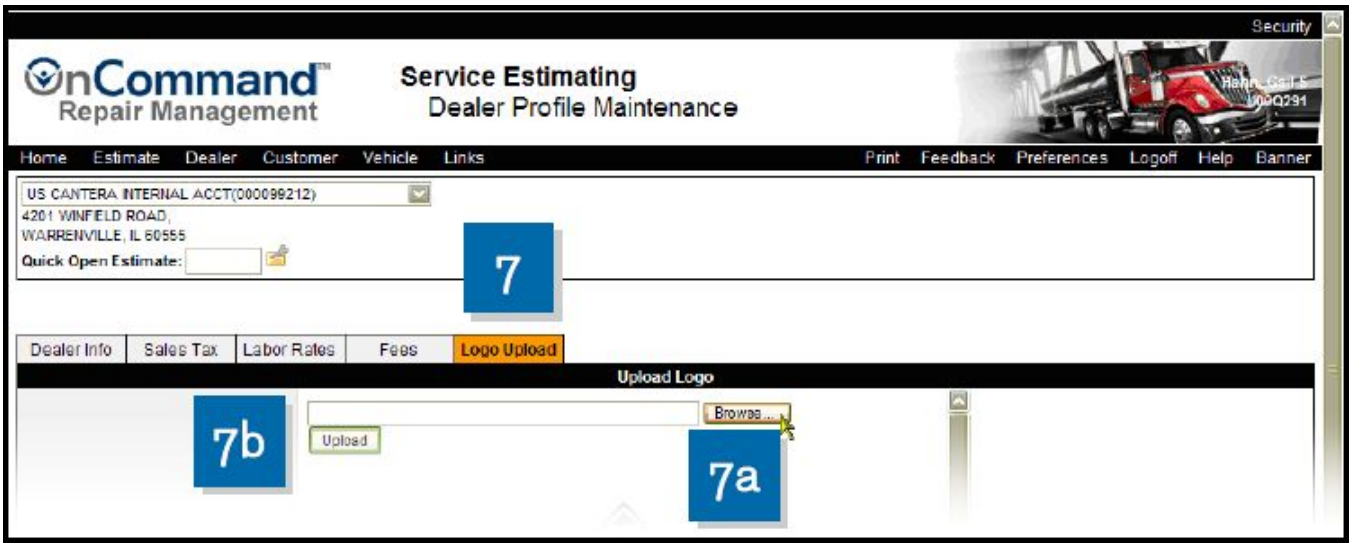
6. The drop-down list for each variable fee lets you choose what the fee applies to: Parts, Labor, Parts and Labor, or None



7. Click the Logo Upload tab to upload your dealership's logo. The maximum file size is 2 MB. This logo will be printed in the upper right-hand corner of every estimate

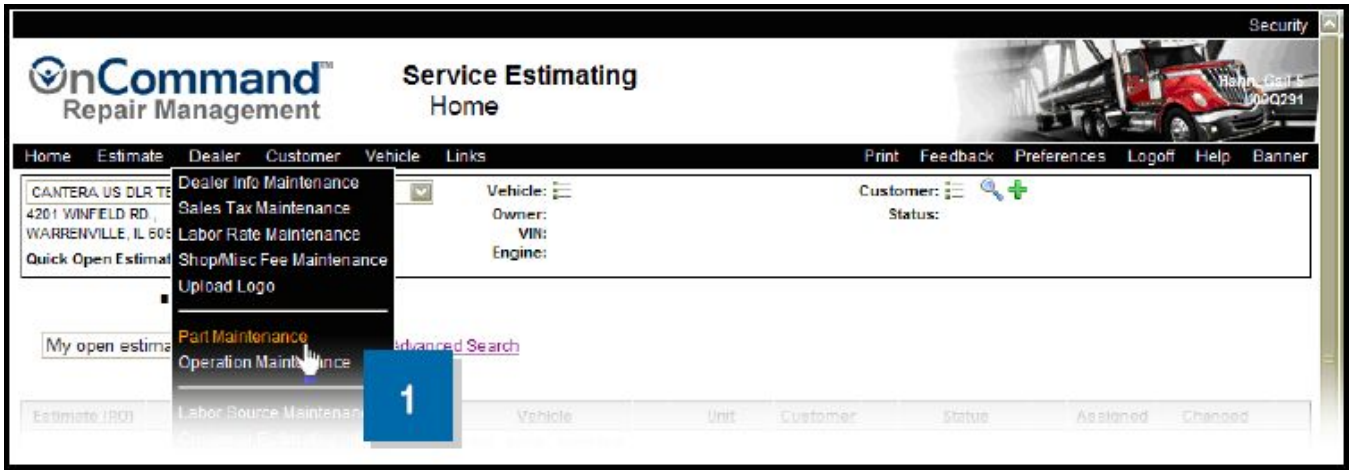
   7a. Click the Browse button to locate it

   7b. Then click the Upload button



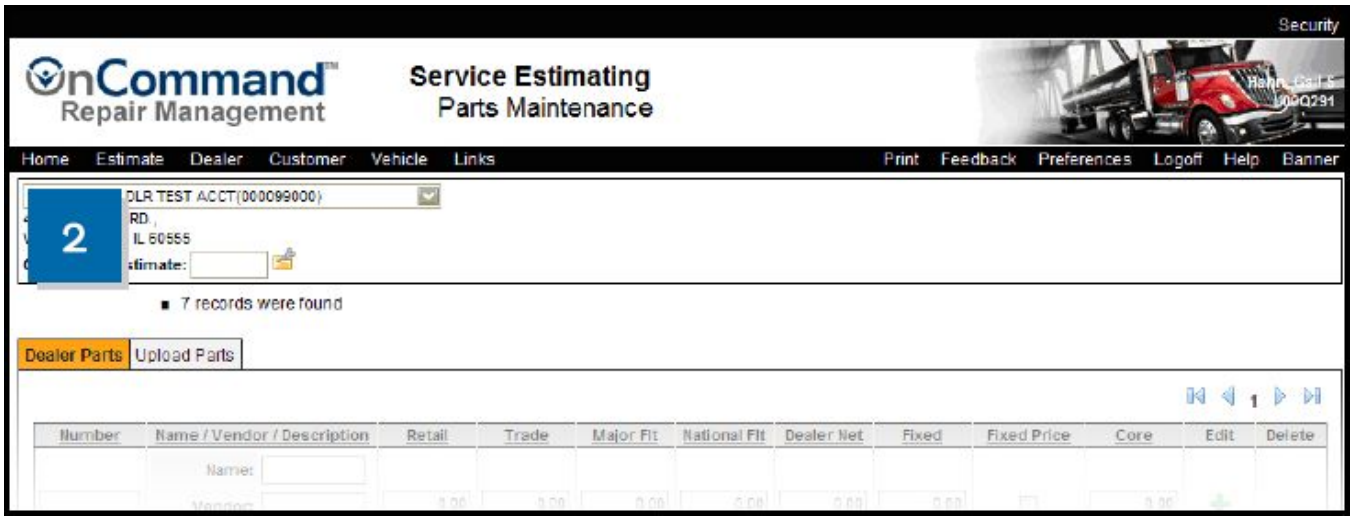
4.6.3. Managing/Uploading Dealer Specific Parts

1. Select Part Maintenance from the Dealer drop-down menu

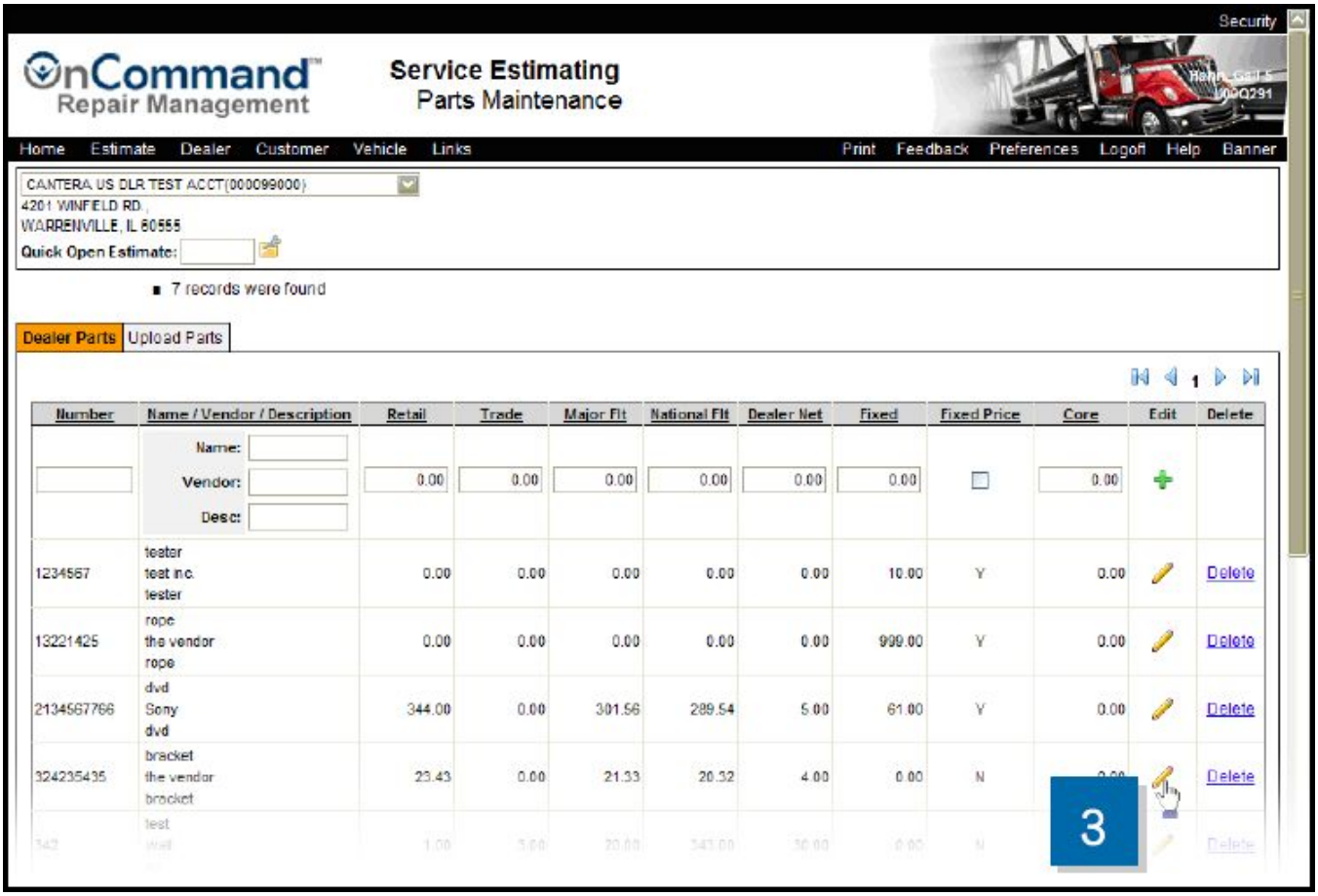


2. The Dealer Parts tab shows the dealer parts that have been uploaded into the system. Here you can edit or delete existing parts and add individual parts one by one

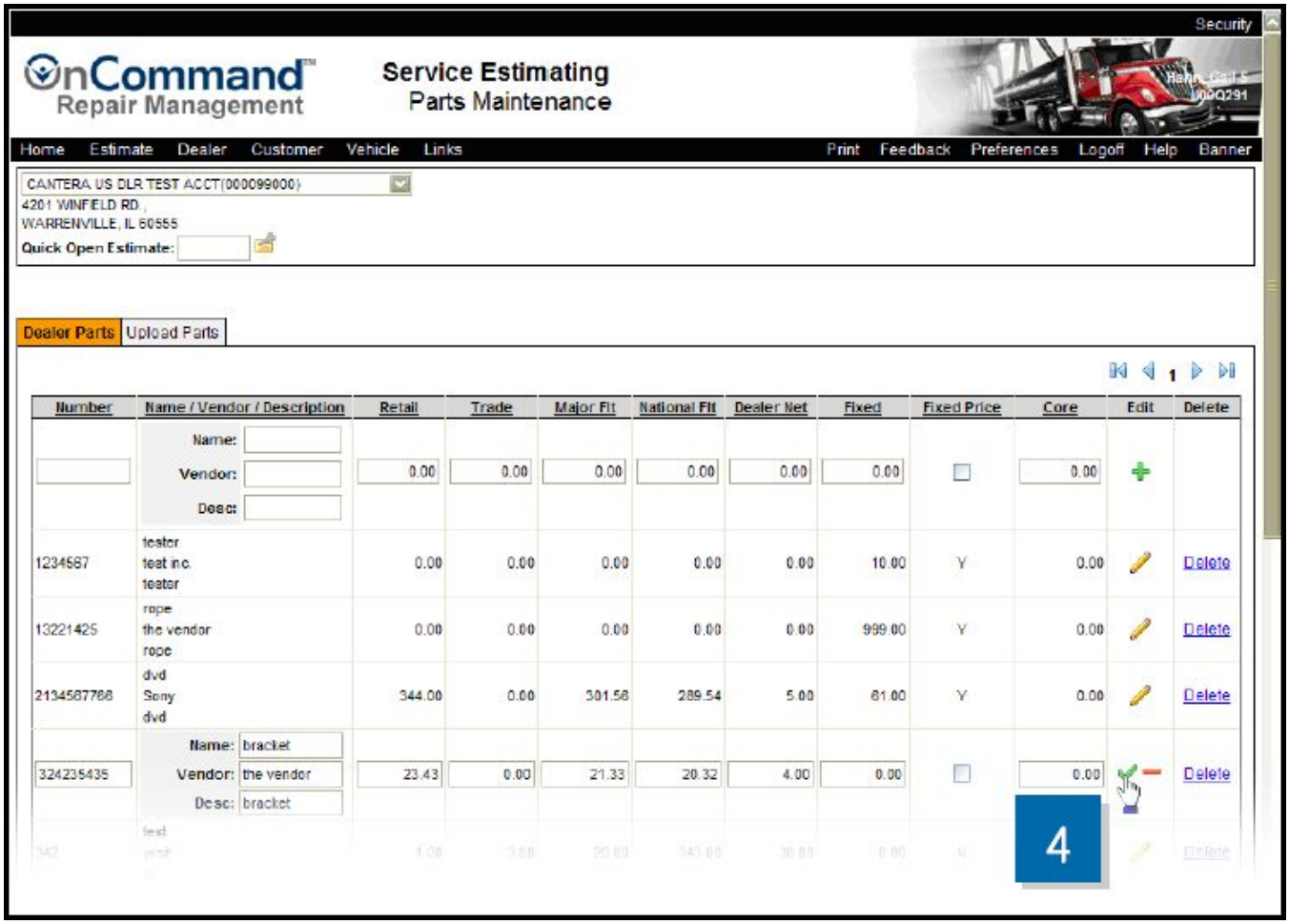
   To add a large number of parts, use the Upload Parts tab described starting in Step 7 in Section 4.6.2. Managing My Dealer Information."



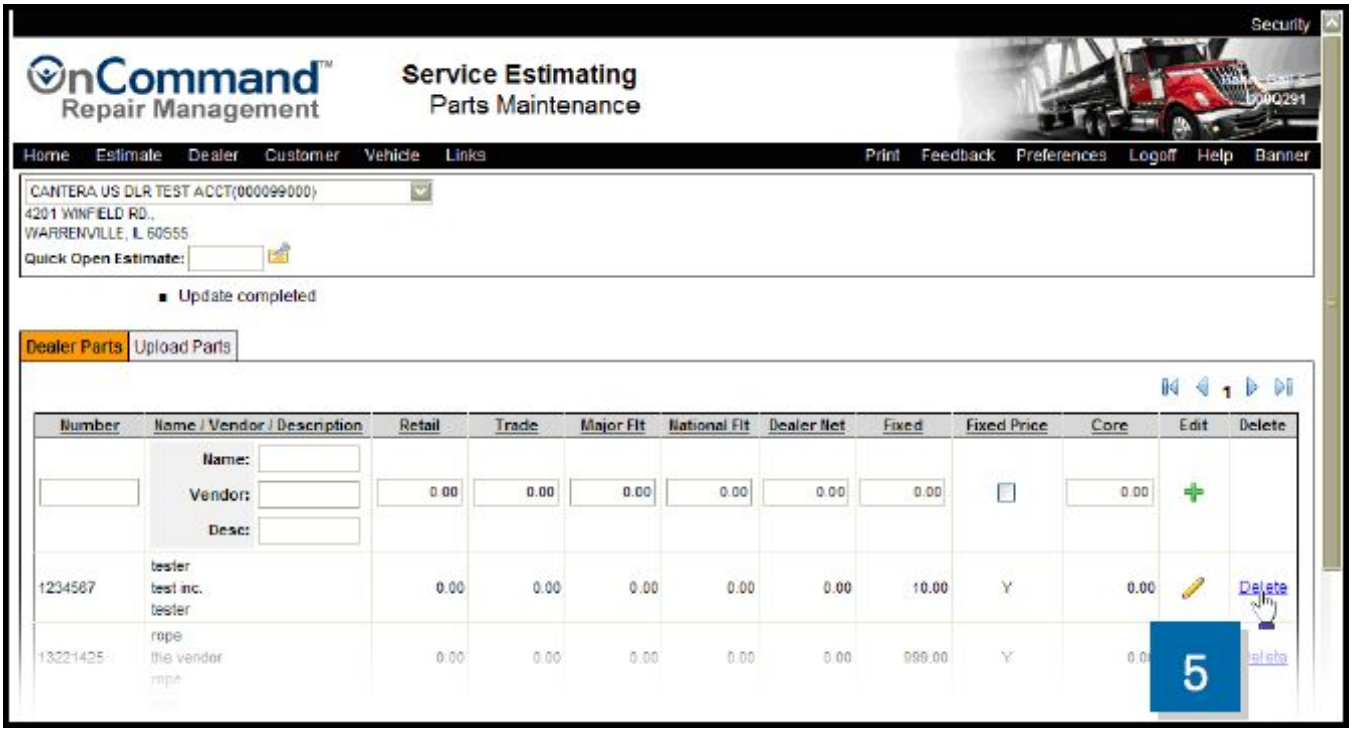
3. **To edit a part,** locate it in the list and click on the Pencil icon at the end of that row



4. The selected part now appears in edit mode. You can change the part number, part name, vendor, description, and the part pricing. When you have completed all changes, click the green check icon to save the edited part.



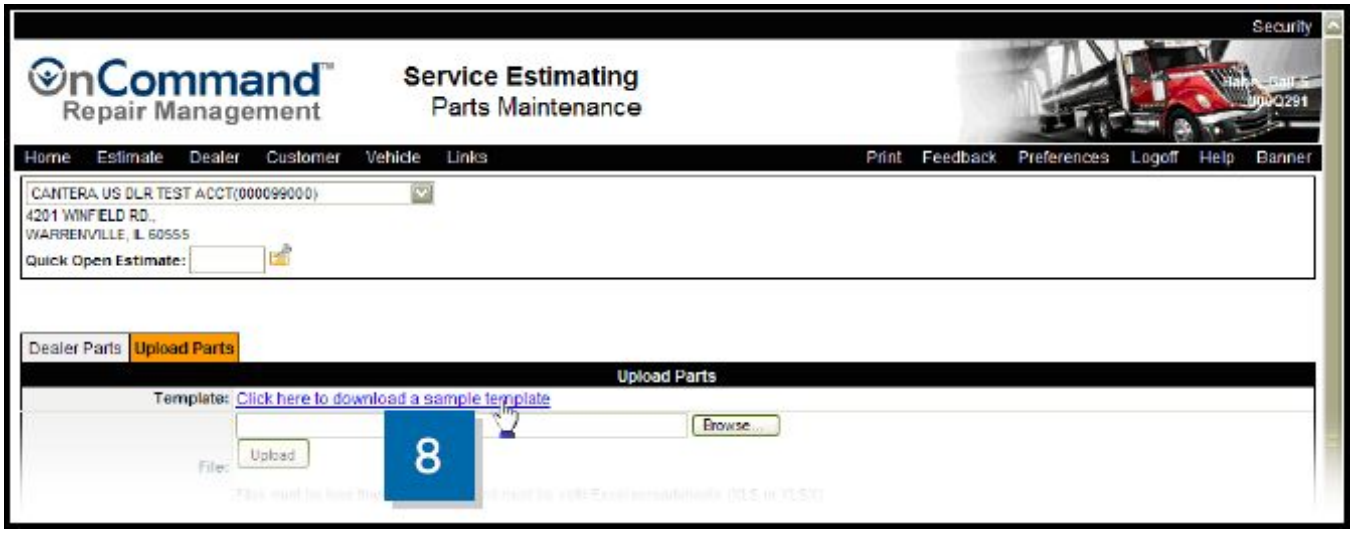
5. To delete a part, click on the Delete link. You will be asked if you are sure you want to delete the part; click OK



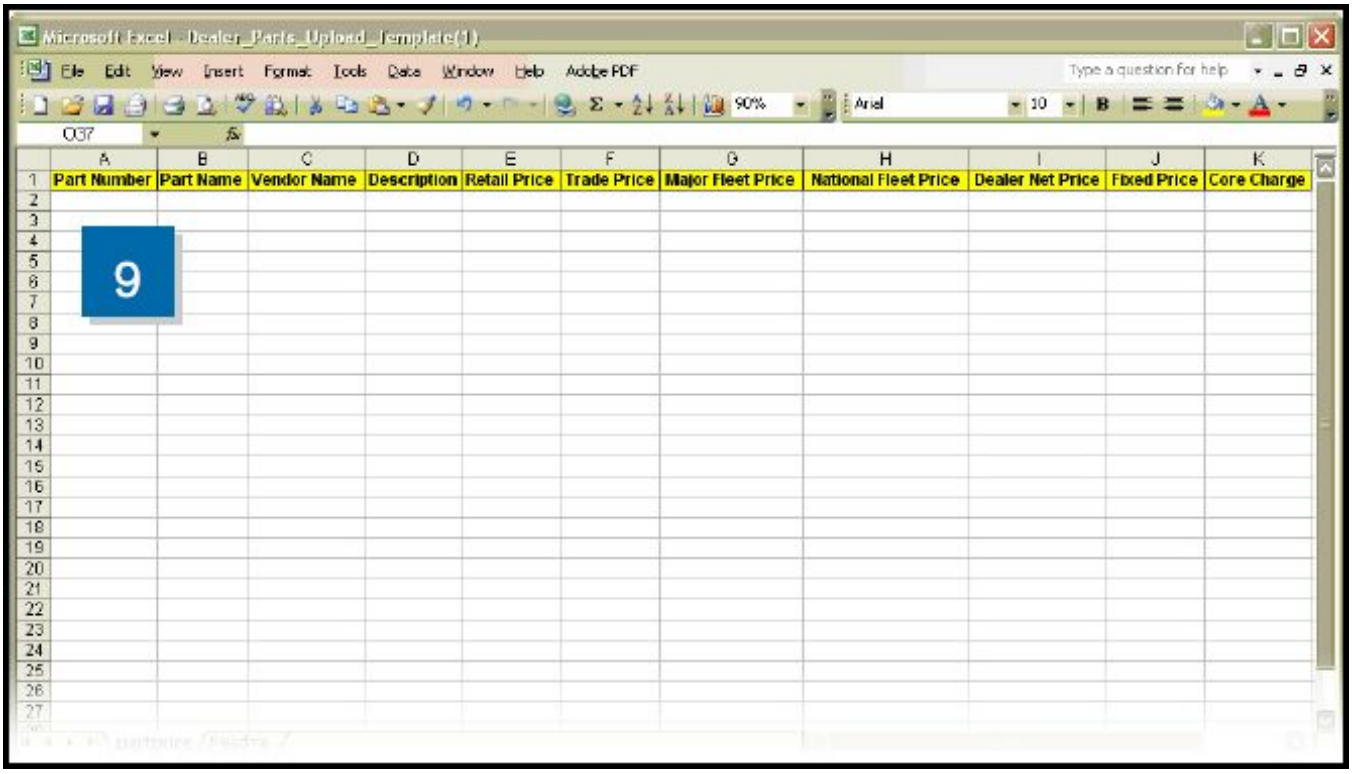
6. **To add individual parts,** fill in the blank text boxes at the top of the Dealer Parts tab with the required information and click the green plus icon at the end of the row

7. **To upload multiple parts,** click on the Upload Parts tab

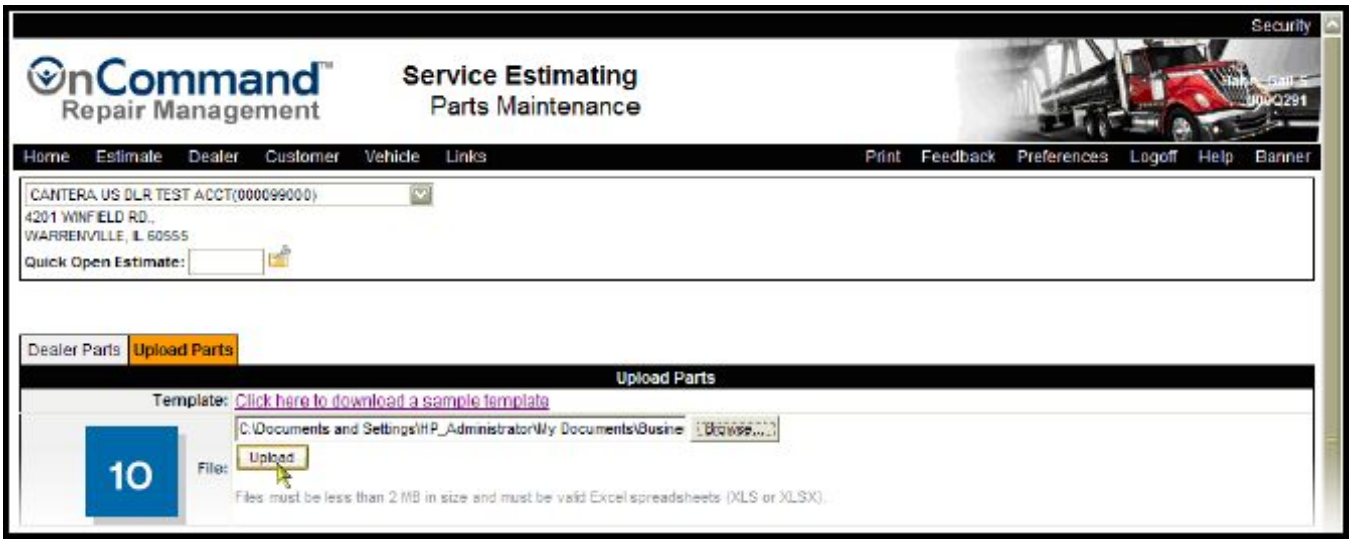
8. Parts must be uploaded using an Excel spreadsheet



9. This will open a File Download pop-up screen asking you to open or save the file. When you click the Open button, the Excel template opens.

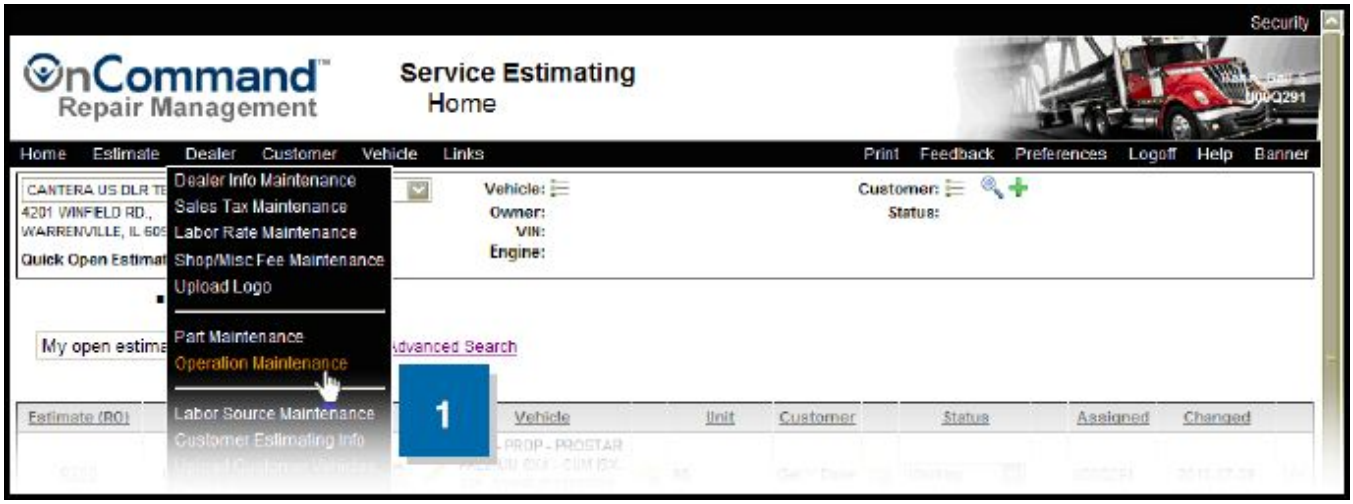


10. After you've entered the parts into the template, you can upload it by locating the file using the Browse button and then clicking the Upload button

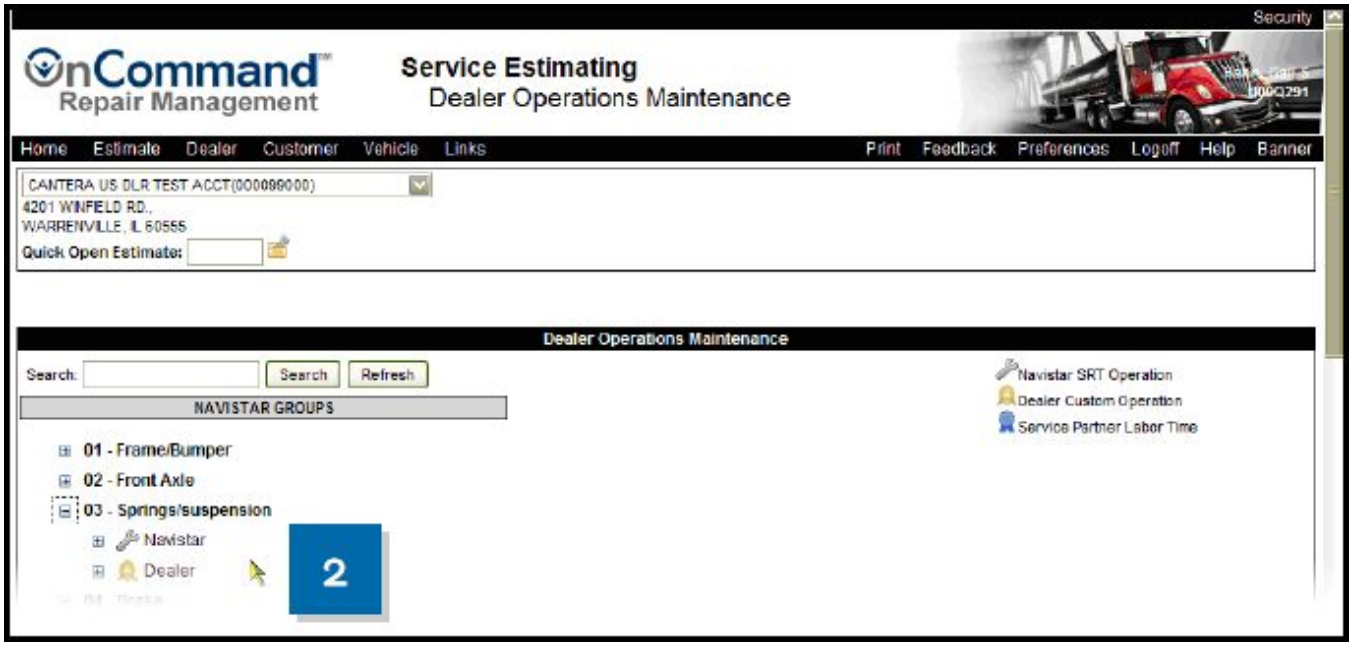


4.6.4. Managing Dealer Specific Labor Operations

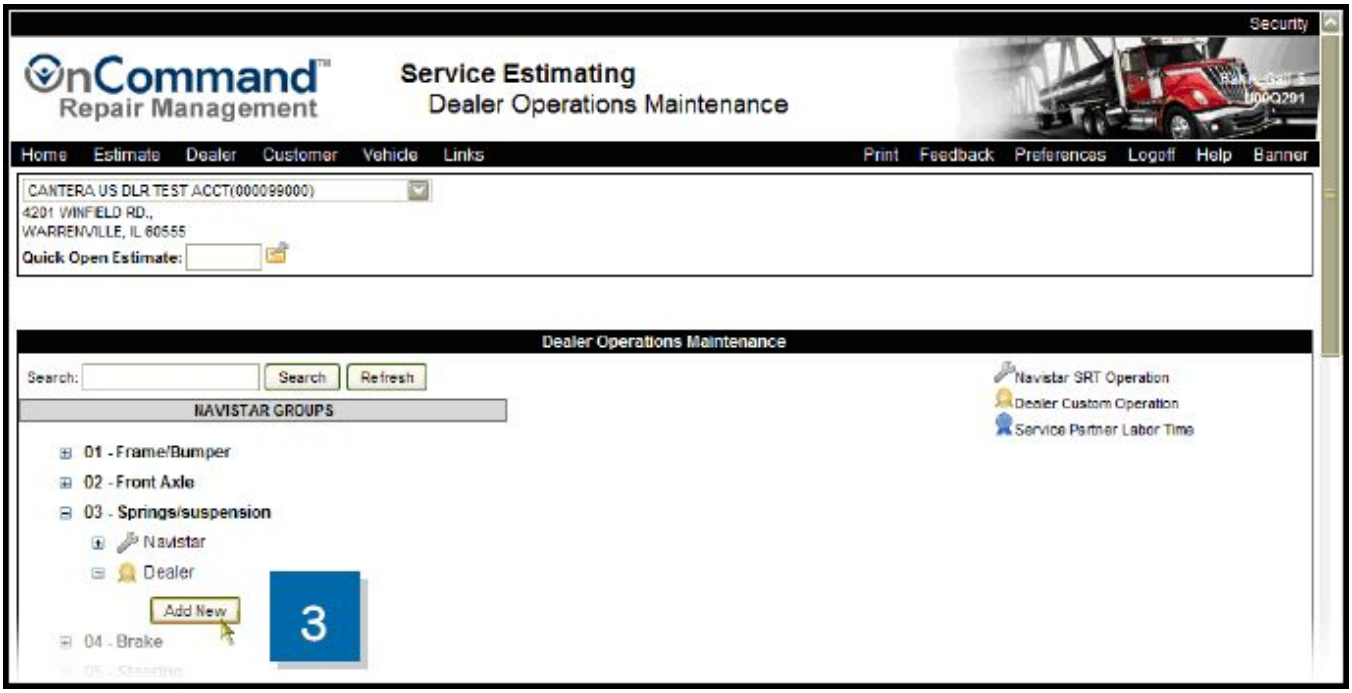
1. Select Part Maintenance from the Dealer drop-down menu



2. In the operations tree each labor group contains two folders: Navistar and Dealer



3. Fixed pricing can only be set in the Dealer tree branch. To set up a fixed pricing source, click the Add New button.

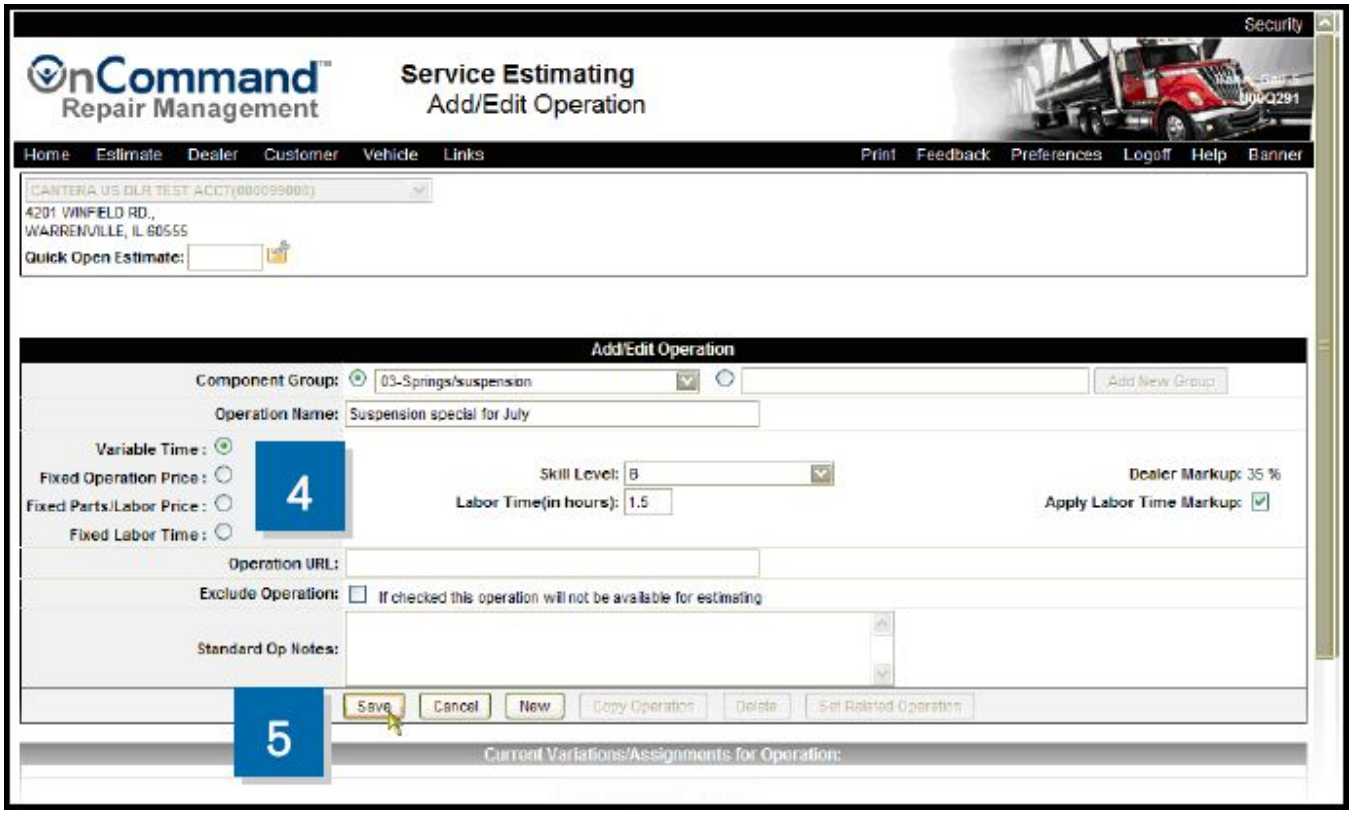


4. Complete the required fields. There are four options for pricing source:

   - Variable Time
   - Fixed Operation Price
   - Fixed Parts/Labor Price
   - Fixed Labor Time

   The option you choose determines what additional fields must be completed

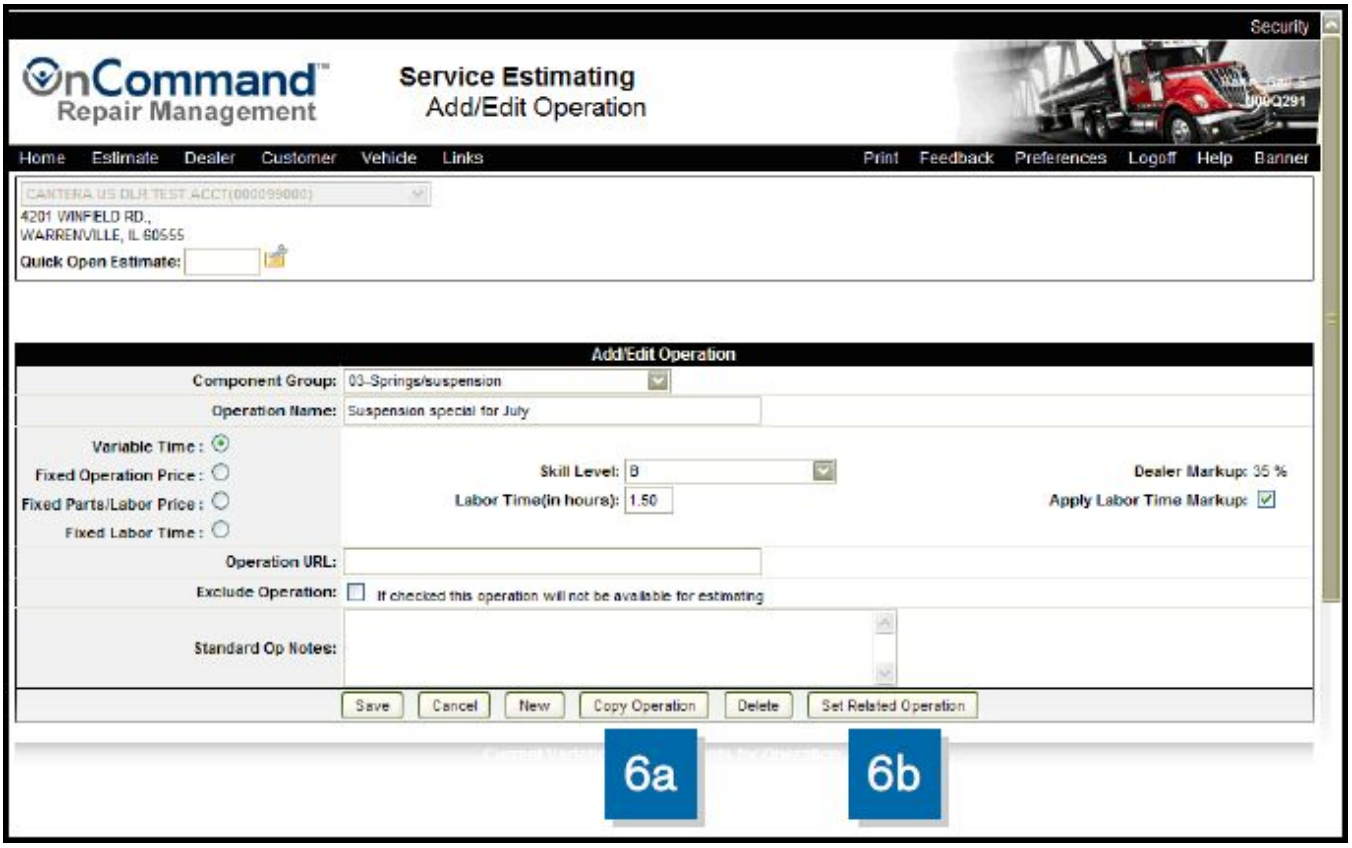
5. When done, click the Save button



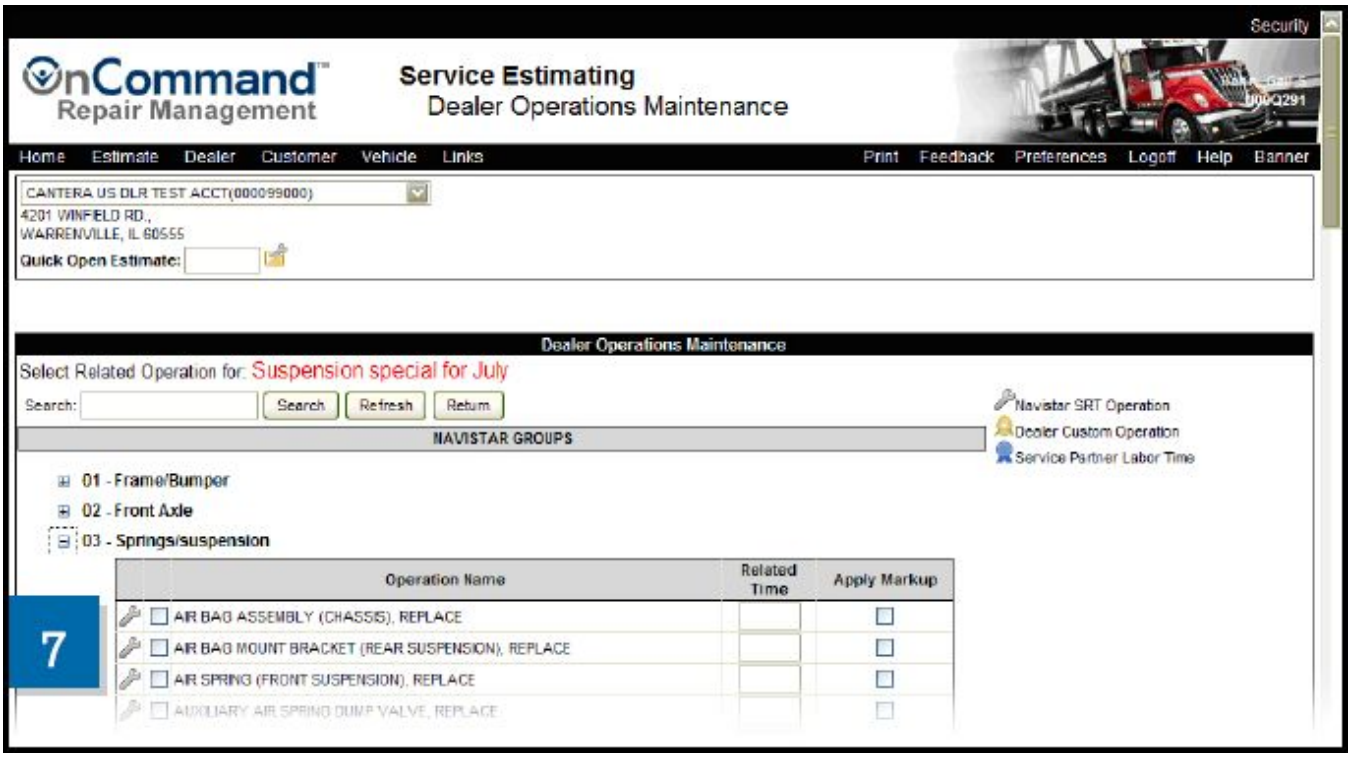
6. Additional buttons at the bottom of the screen are now active

   6a To copy this operation to other locations, click the Copy Operation button

   6b To set related operations, click the Set Related Operation button



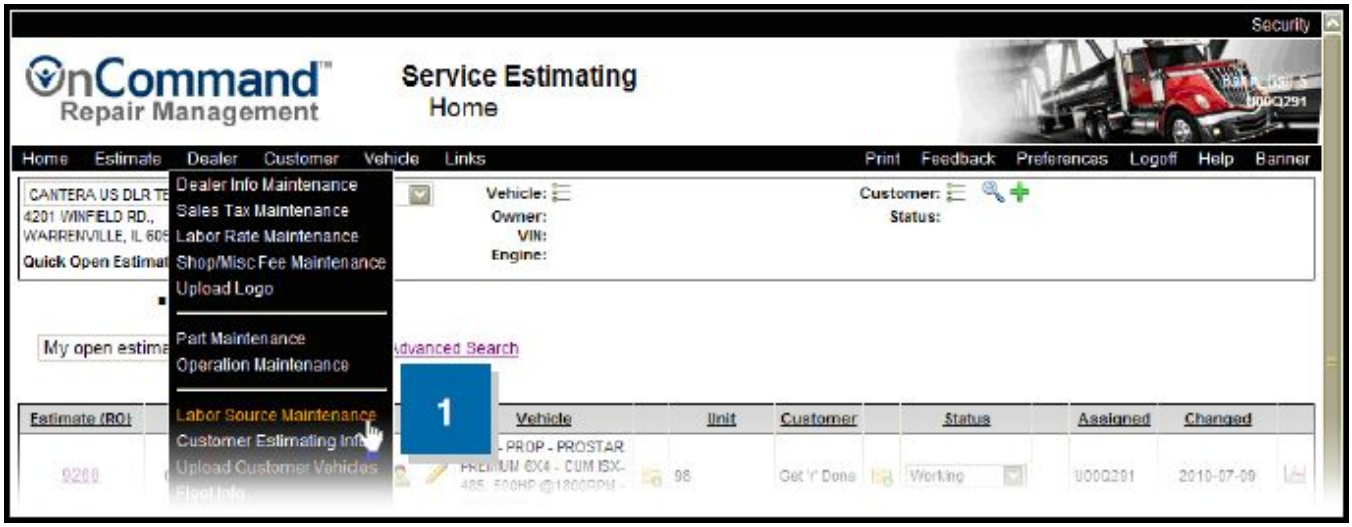
7. You can now select any operations related to this special dealer operation



4.6.5. Managing Special Customer Labor Rates

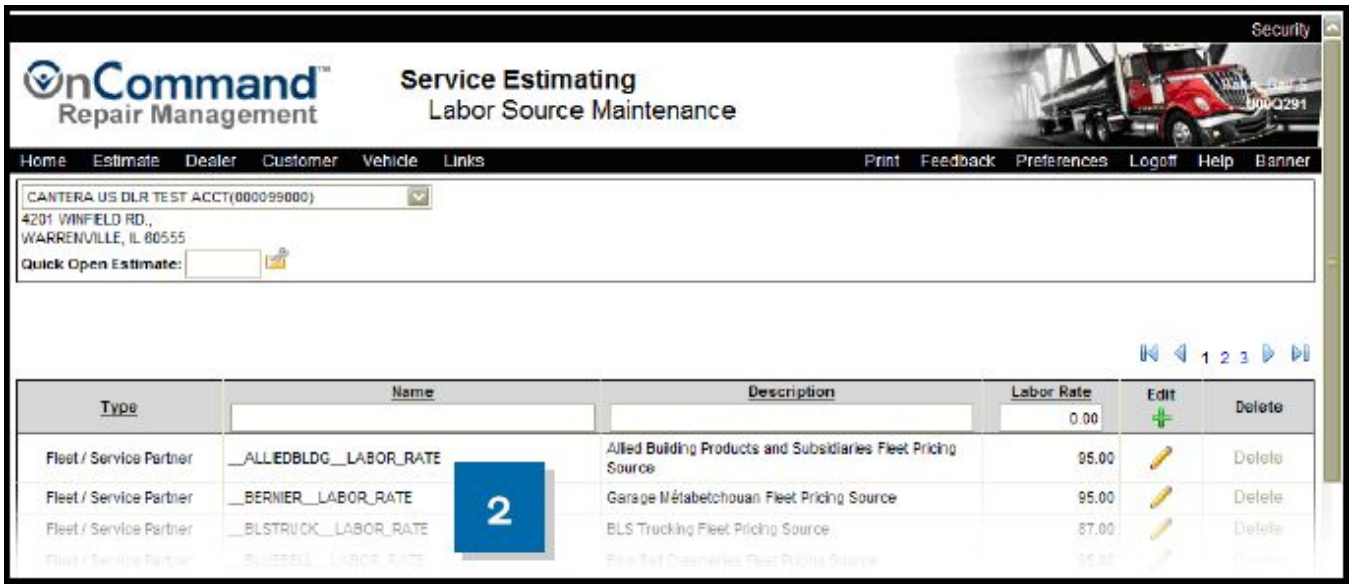
1. Select Labor Source Maintenance from the Dealer drop-down menu

   When adding or editing labor rates, verify that you are in compliance by using the Labor Rate Compliance Calculator that is located on the Dealer Profile Maintenance screen.



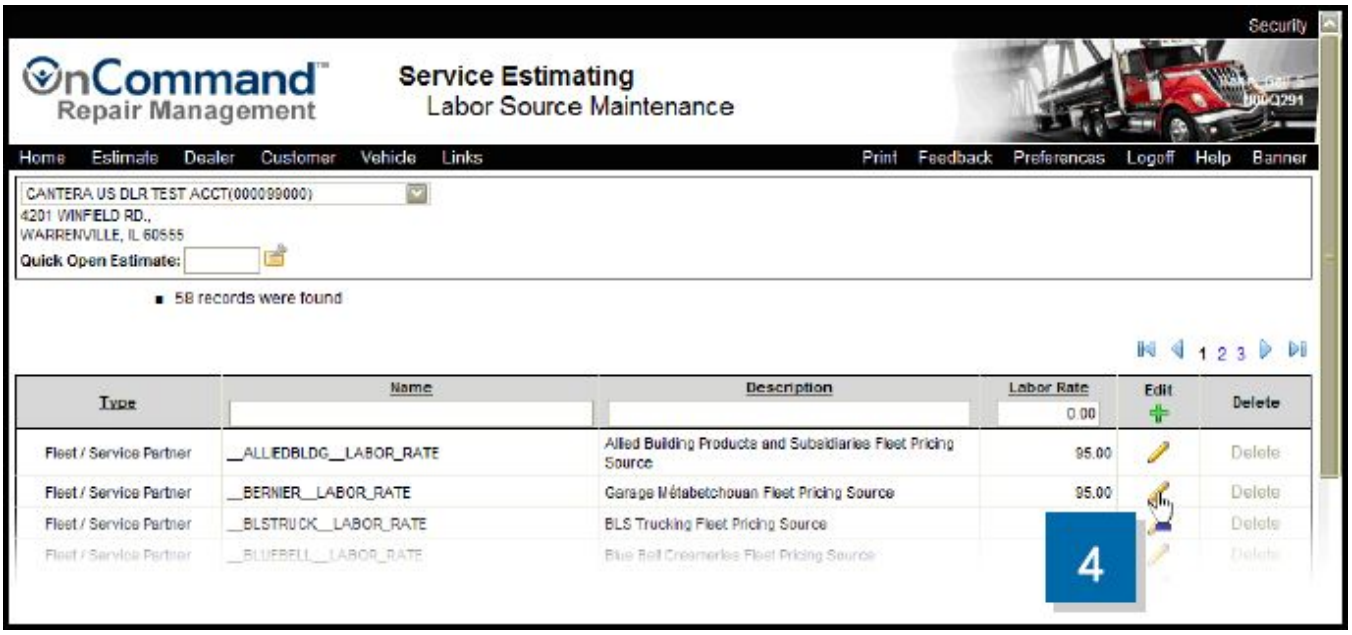
2. Fleet/Service Partner (global to all dealers) labor sources appear first, followed by dealer-specific labor rates

   The Service Partner/Fleet pricing sources cannot be deleted by a dealer and will have a labor rate of 0.00 until updated by the dealer administrator



3. **To add a labor rate,** fill in the information fields at the top of the table, then click the green plus sign at the end of the row

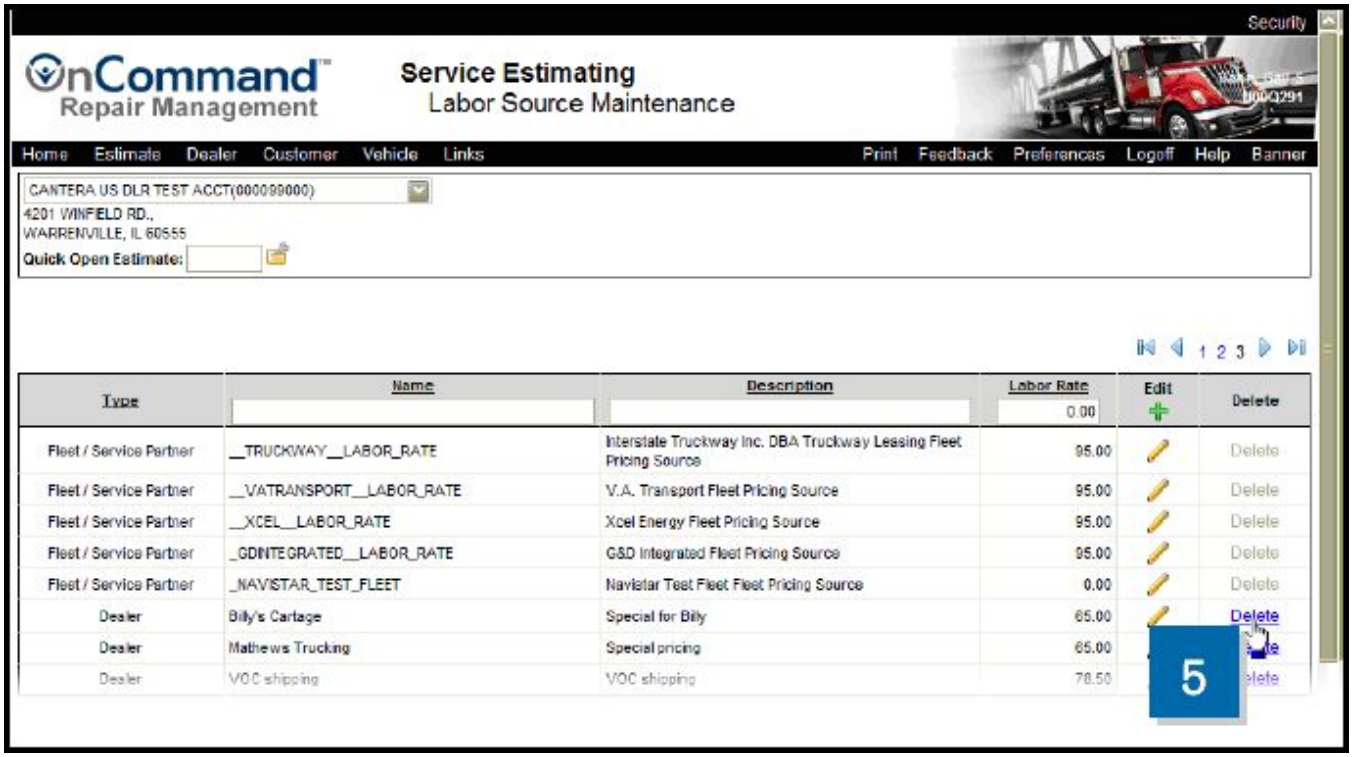
4. **To edit a labor rate,** click the Pencil icon at the end of the row



5. To delete an entry, click on the Delete link at the end of the row

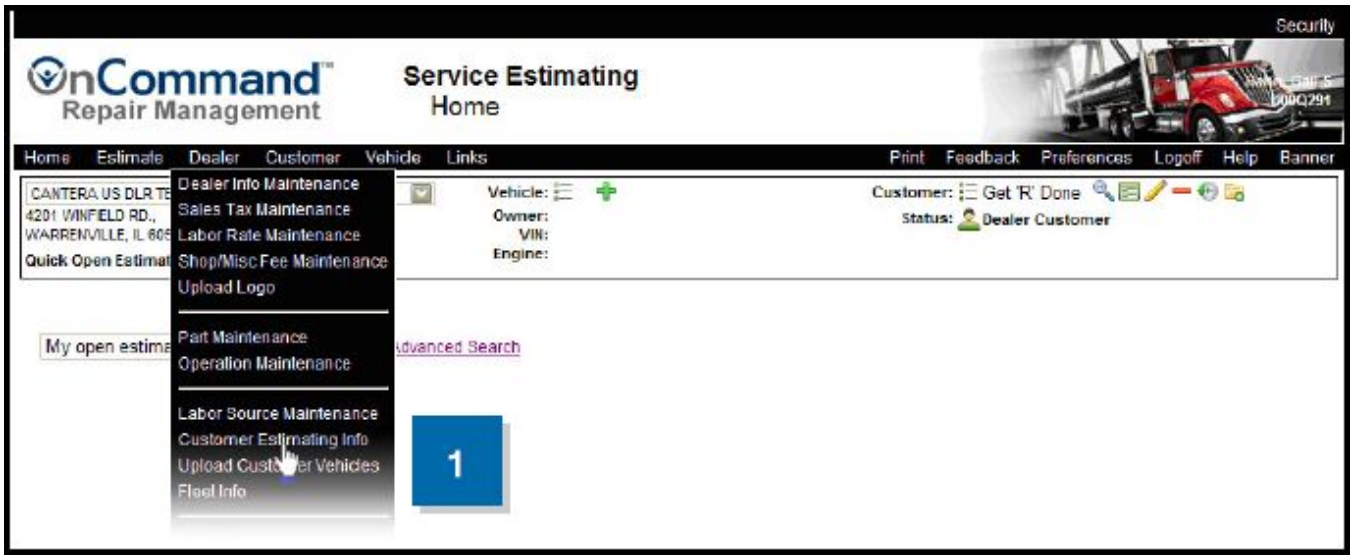
   You can only delete Labor Source rates that have been created for a dealer. Note that the Delete link is grayed out for Fleet/Service Partners.

   You will be asked if you are sure you want to delete; click OK.



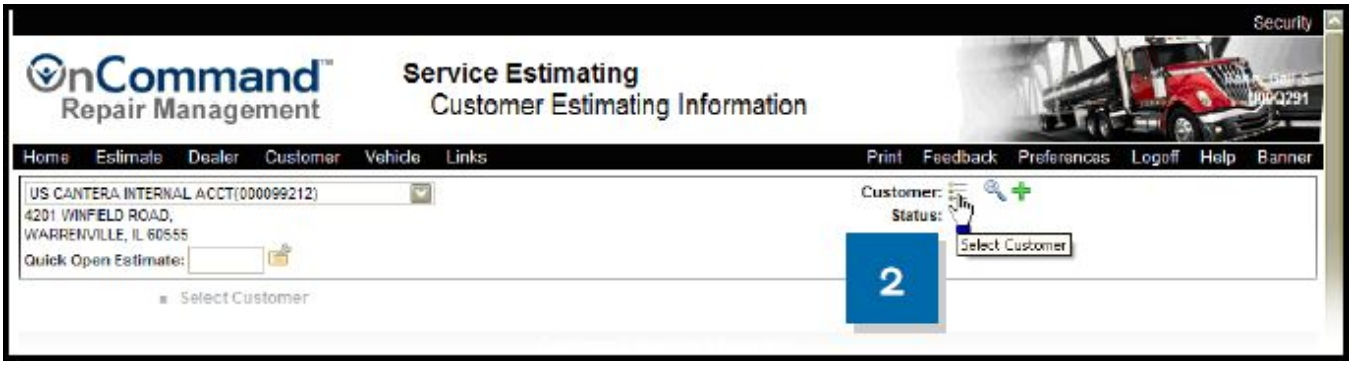
4.6.6. Managing My Customer's Estimating Information

1. Select **Customer Estimating Info** from the Dealer drop-down menu

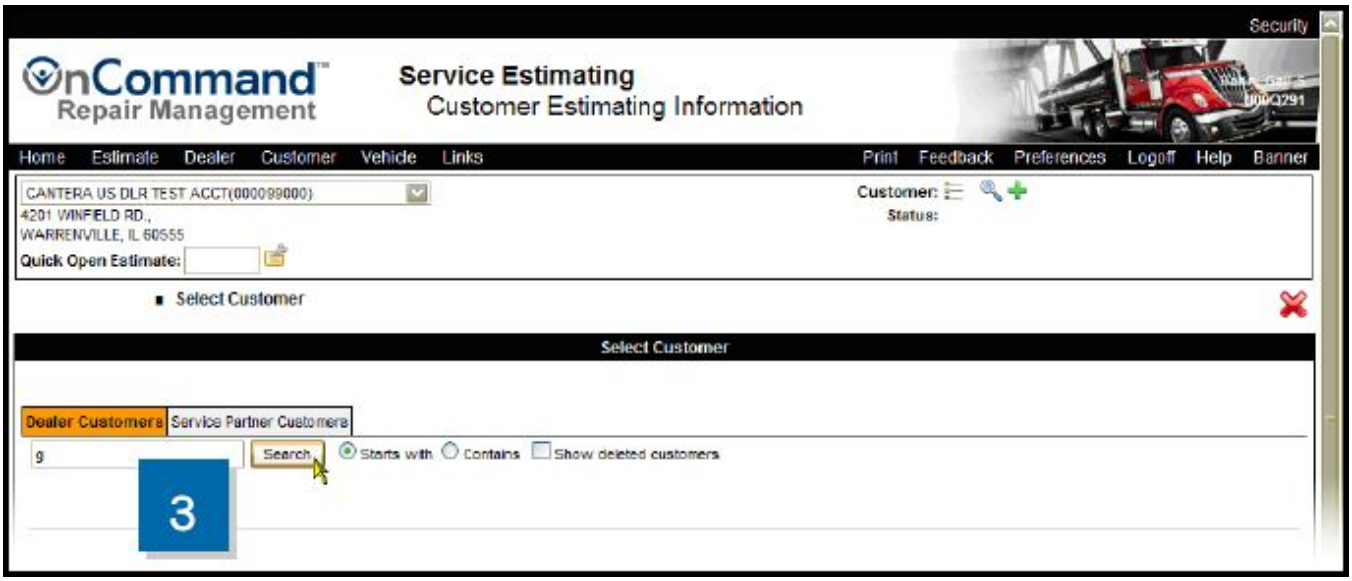


2. Select the customer by clicking on the List icon to look up an existing customer

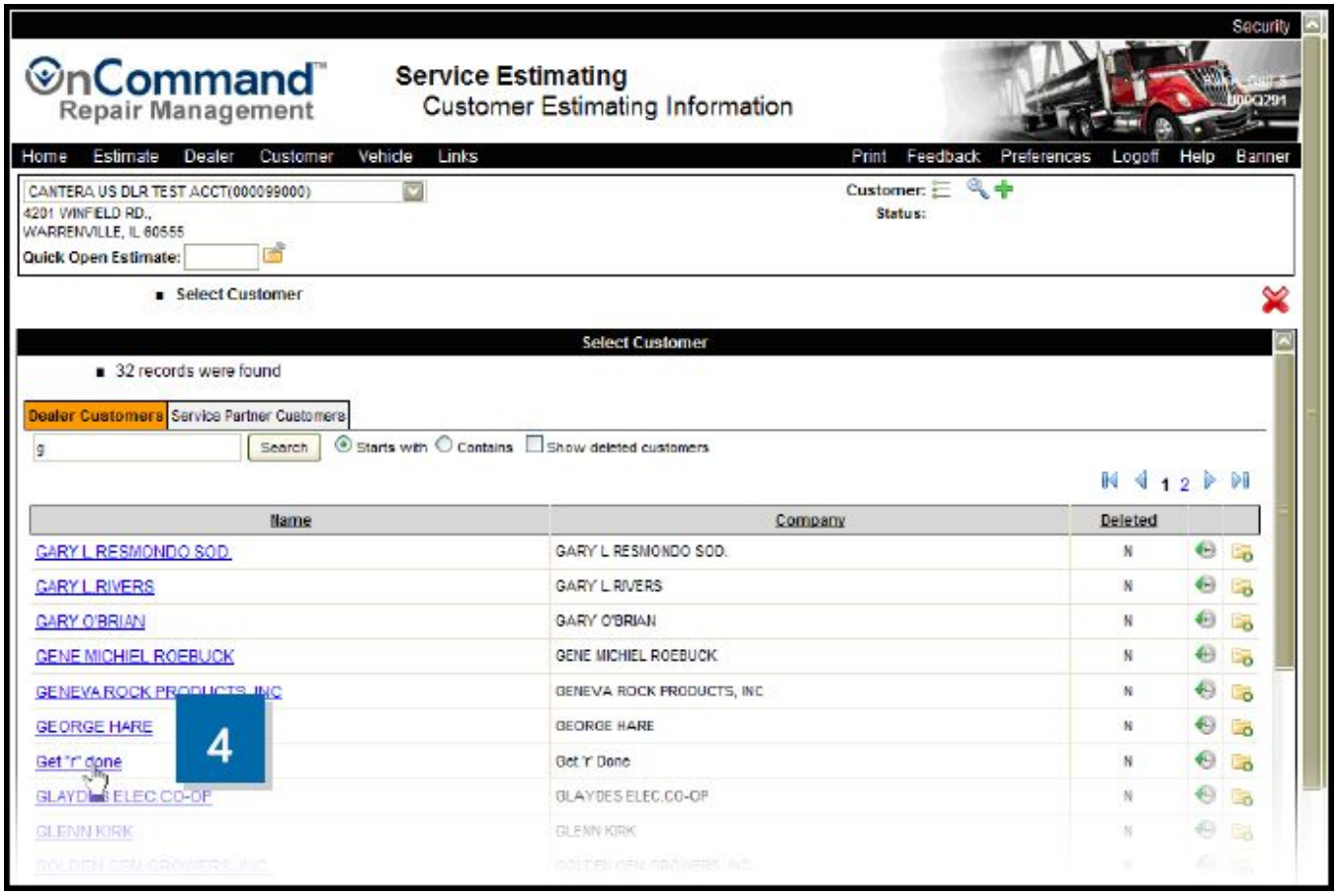
   If adding a customer, refer to the "How do I add a customer Section" in the Creating and Updating Estimates Quick Start Guide



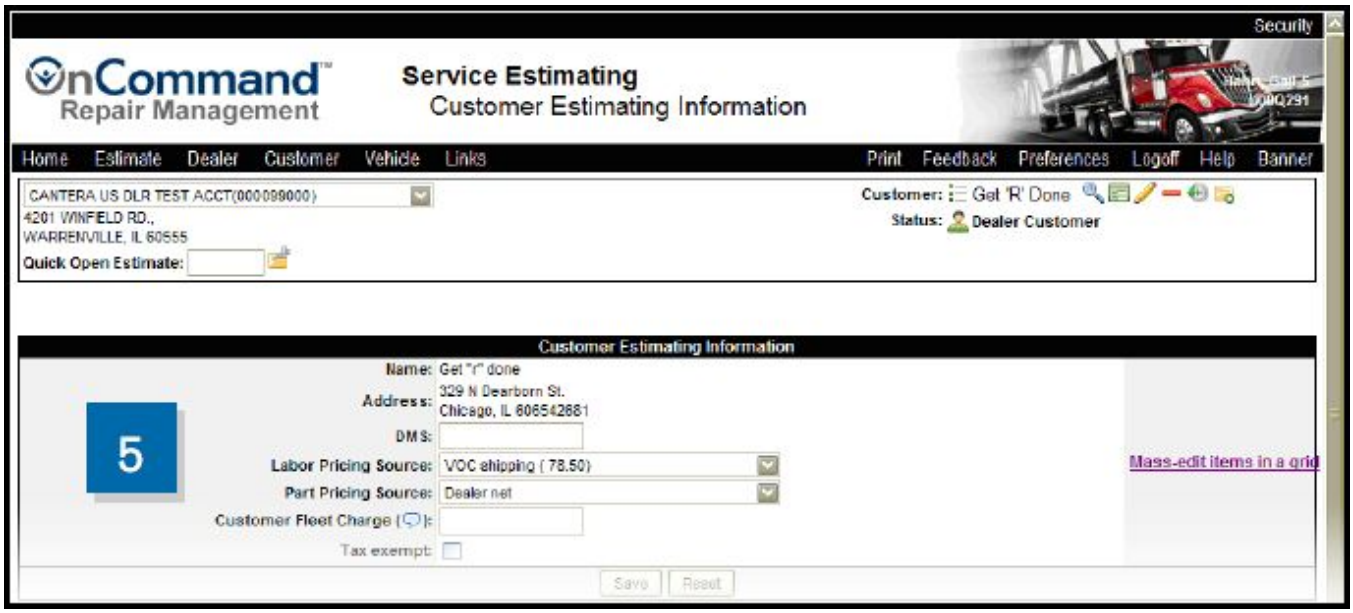
3. The Search function defaults to **Starts** with; enter the first few letters of the customer name and click the Search button



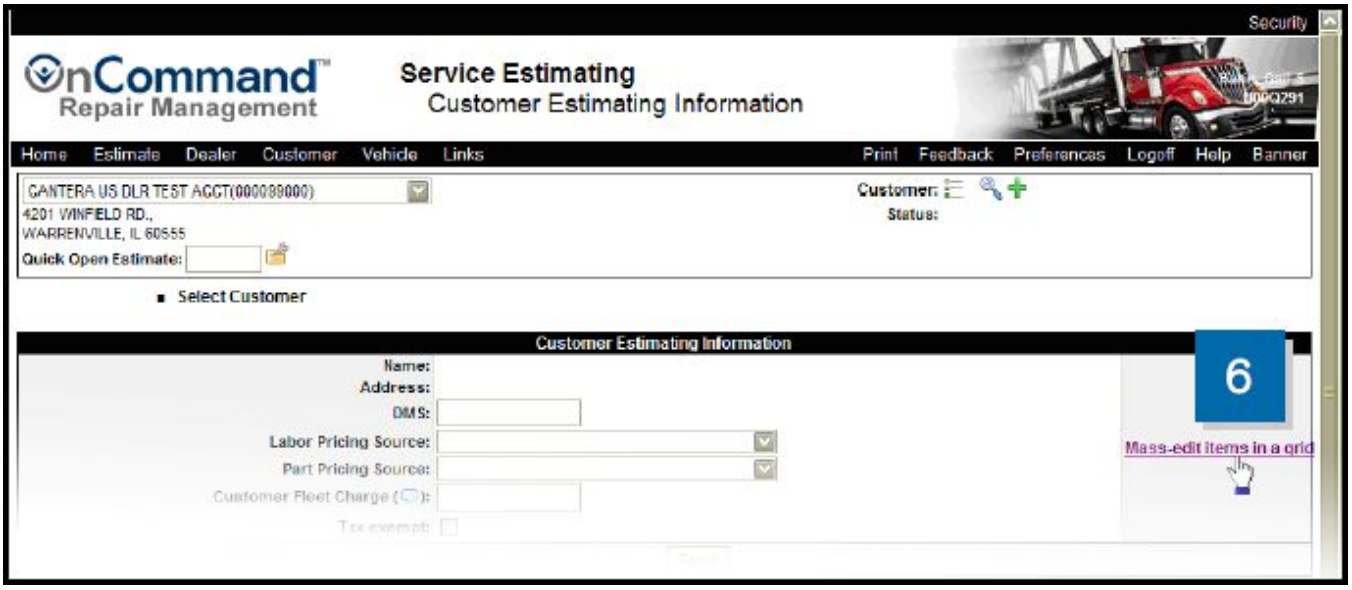
4. Select the customer from the list by clicking on the Name link



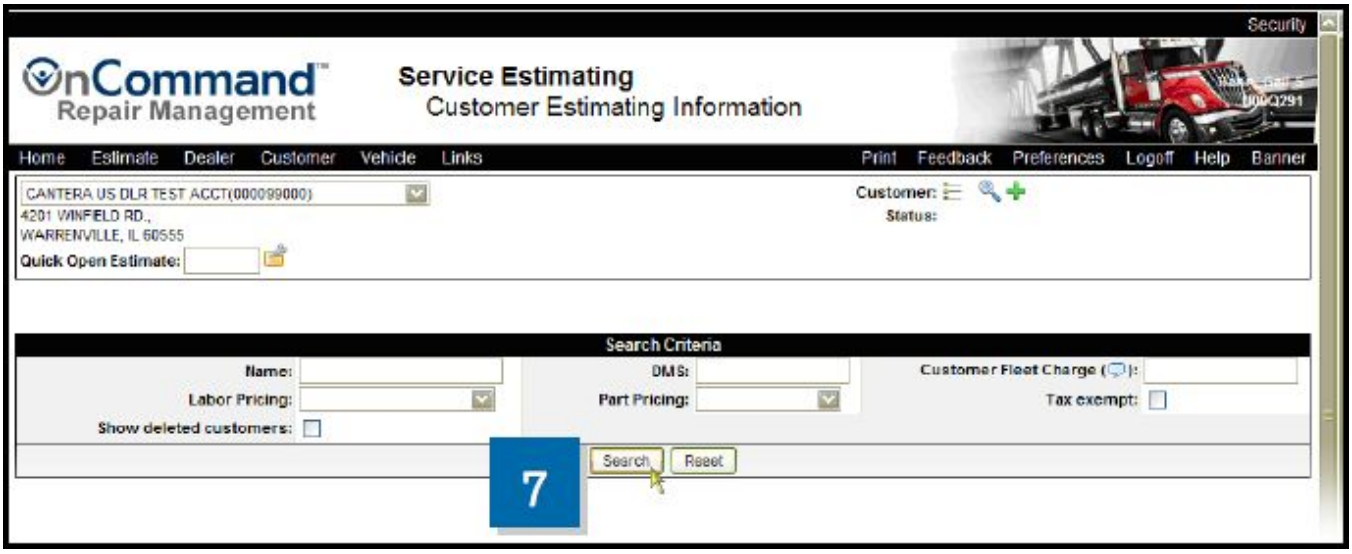
5. The Customer Estimating Information is now populated, and you can add or change fields as needed



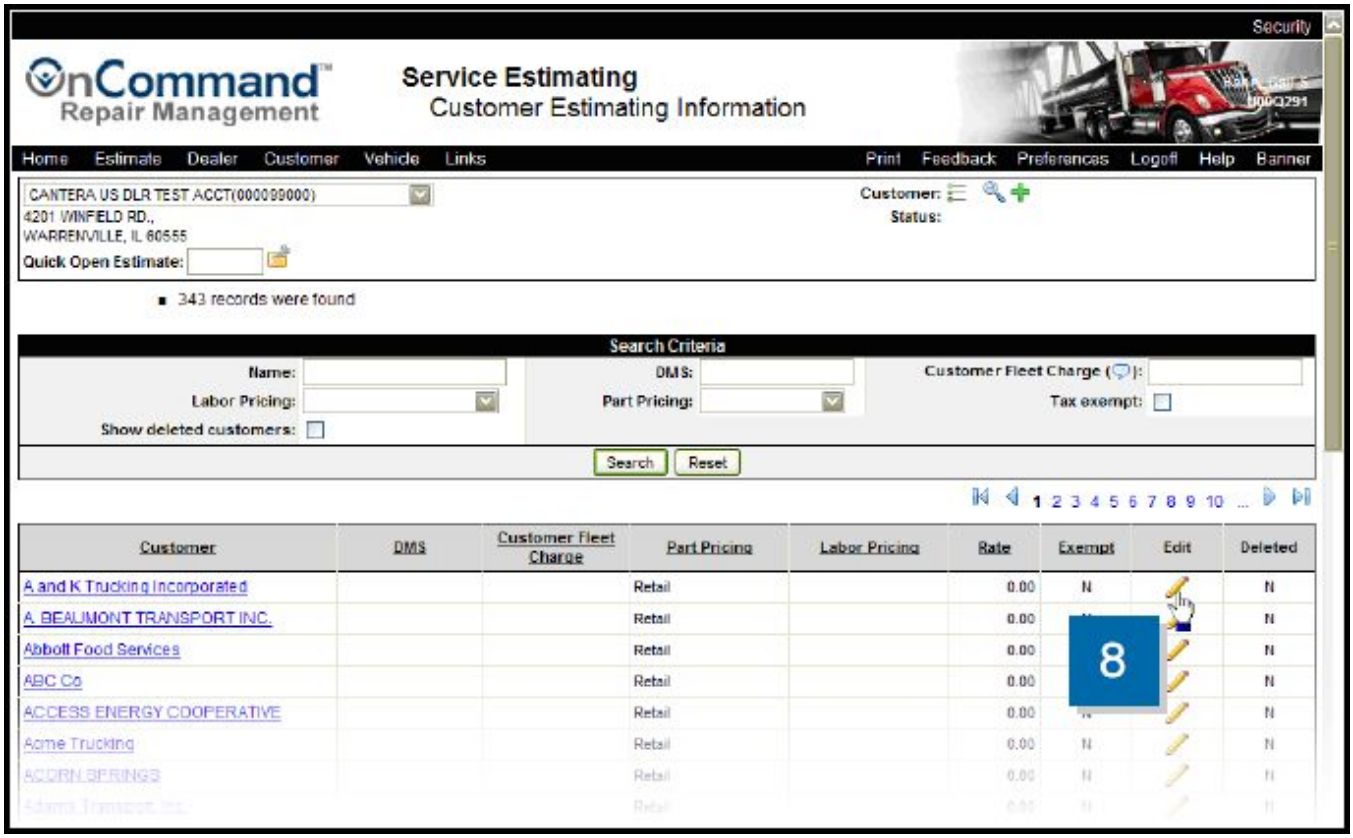
6. To edit a large number of customers, click on the **Mass-edit items in a grid link**



7. Enter your search criteria and click the Search button

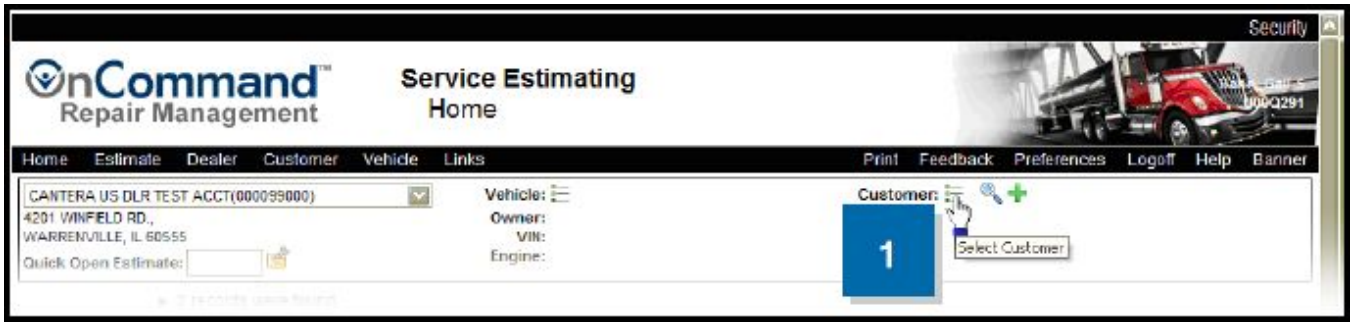


8. If you leave the search criteria blank, all customers will be displayed. To edit a customer's estimating information, click the Pencil icon at the end of the row.

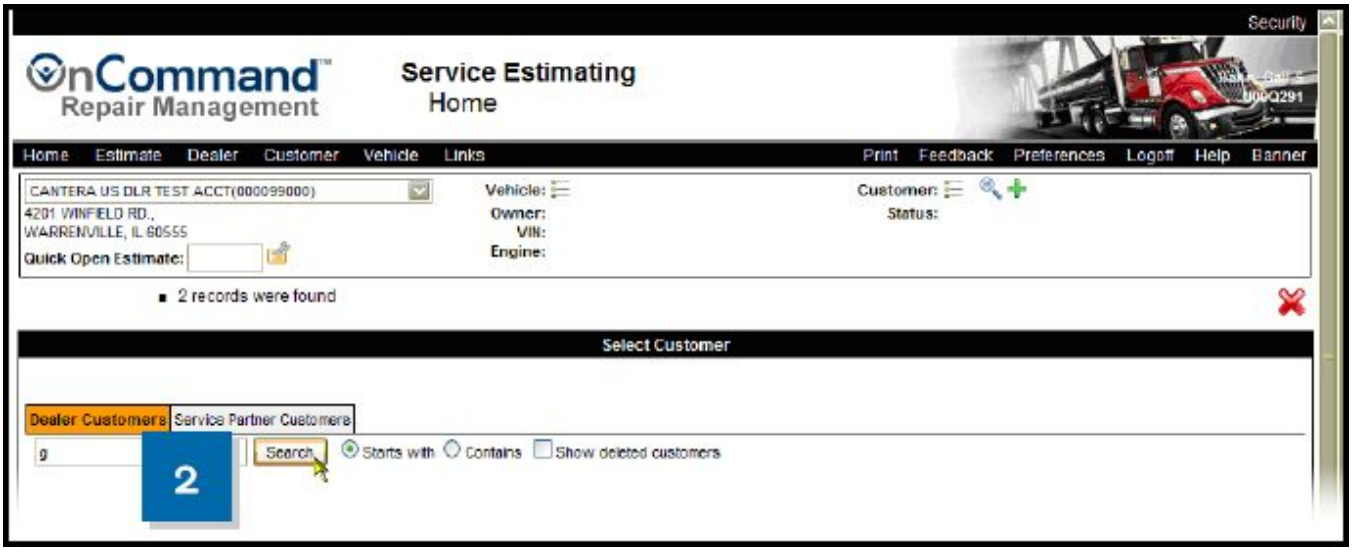


4.7. UPLOADING A CUSTOMER'S VEHICLE

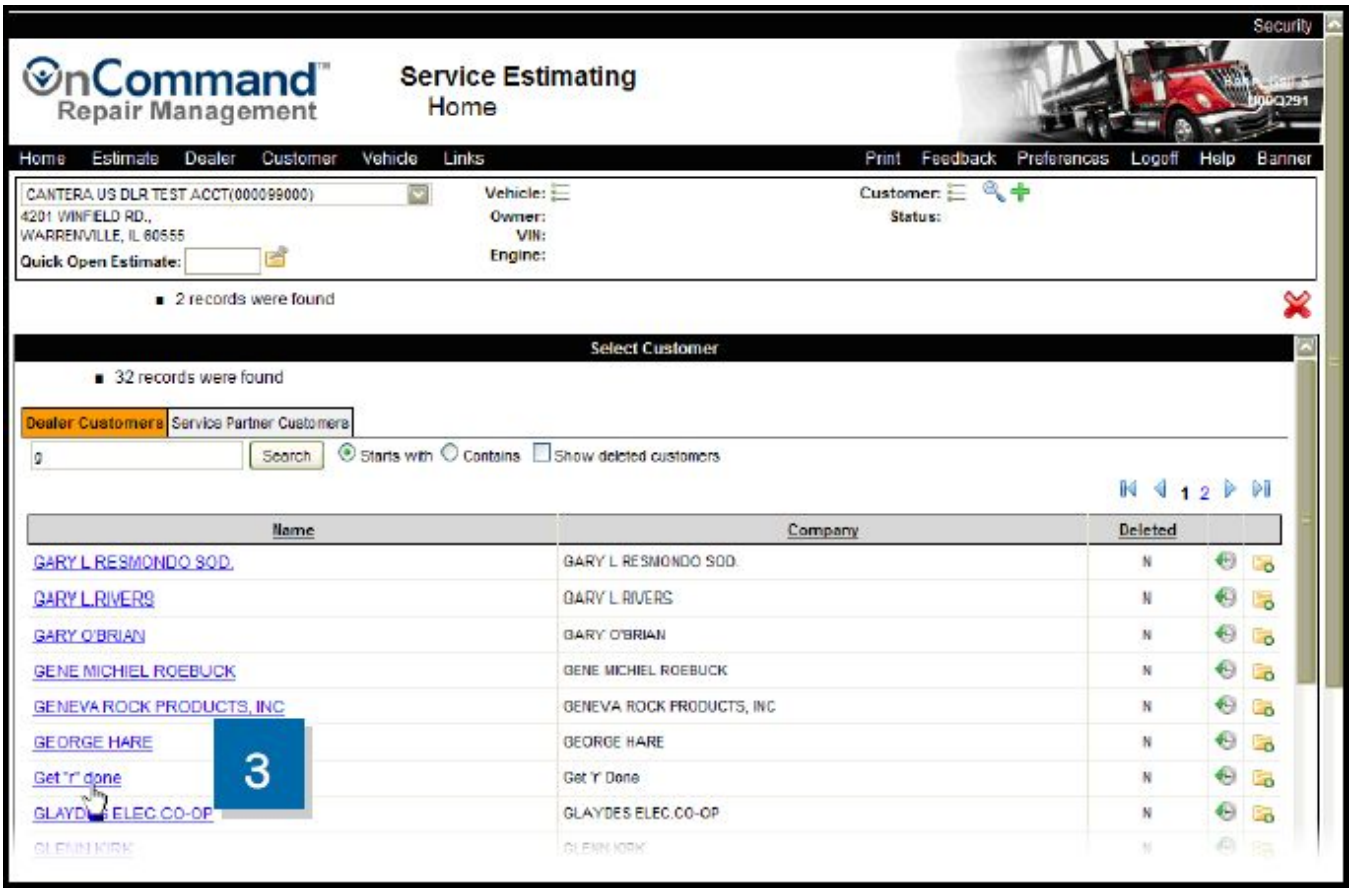
1. Select the customer by clicking on the List icon after Customer in the Estimate header



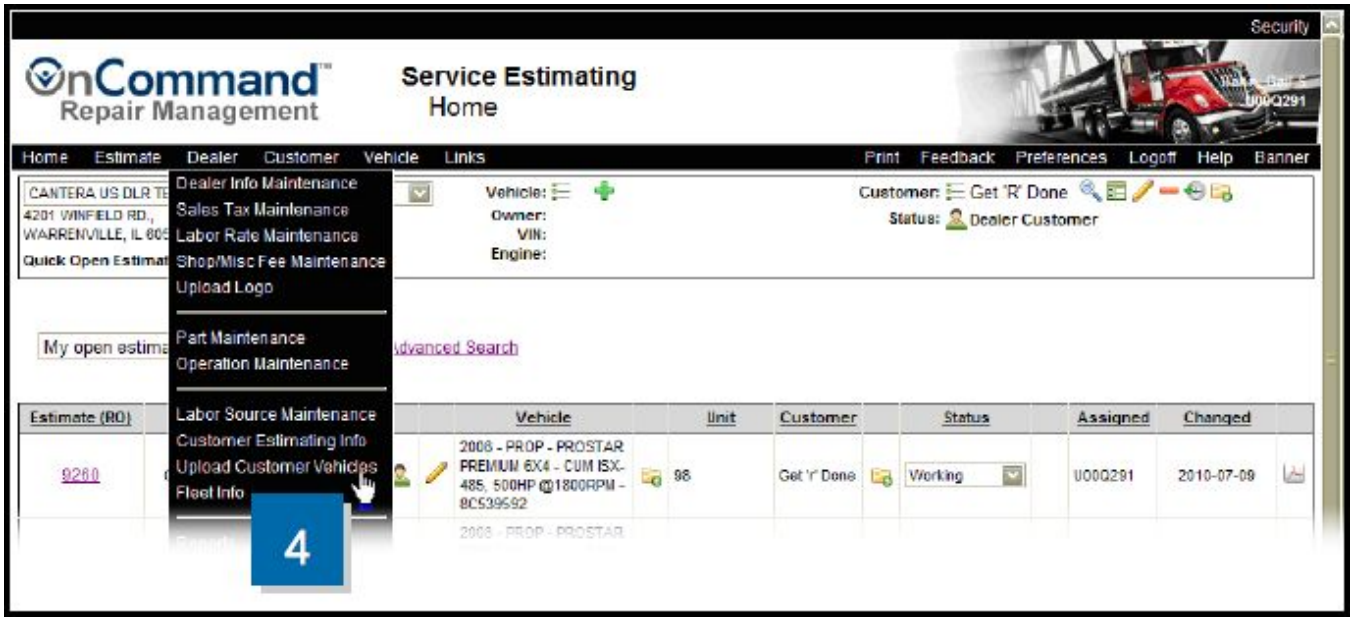
2. The Search function defaults to Starts with; enter the first few letters of the customer name and click the Search button



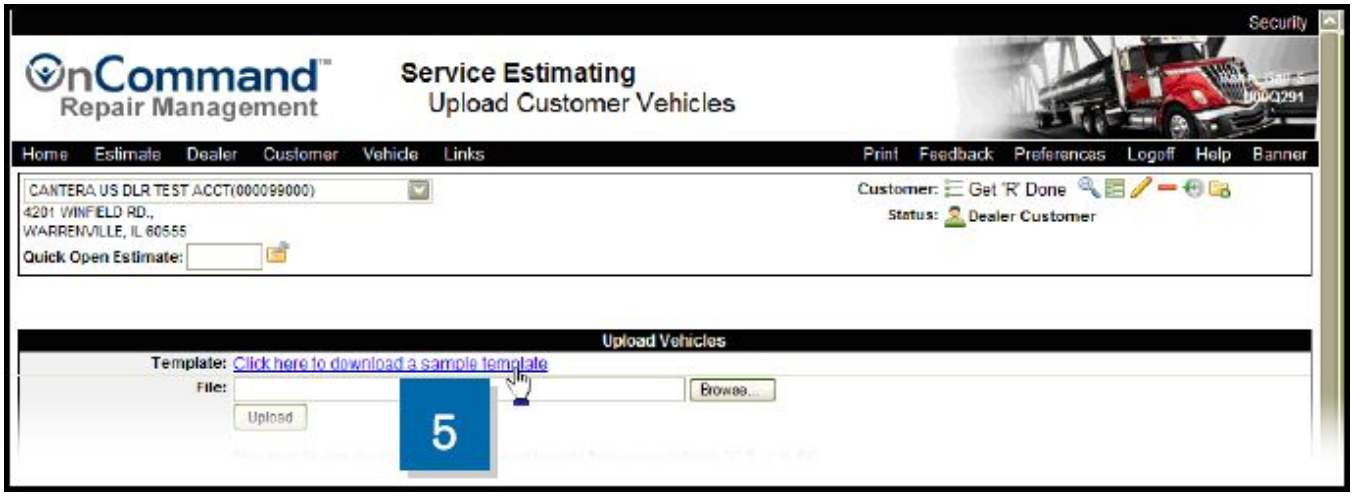
3. Select the customer from the list by clicking on the Name link



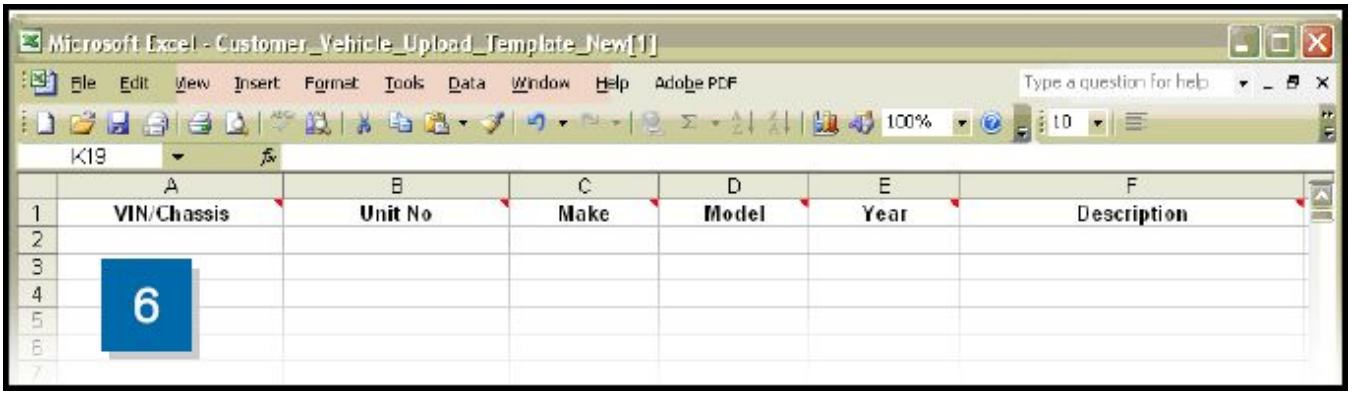
4. Select Upload Customer Vehicles from the Dealer drop-down menu



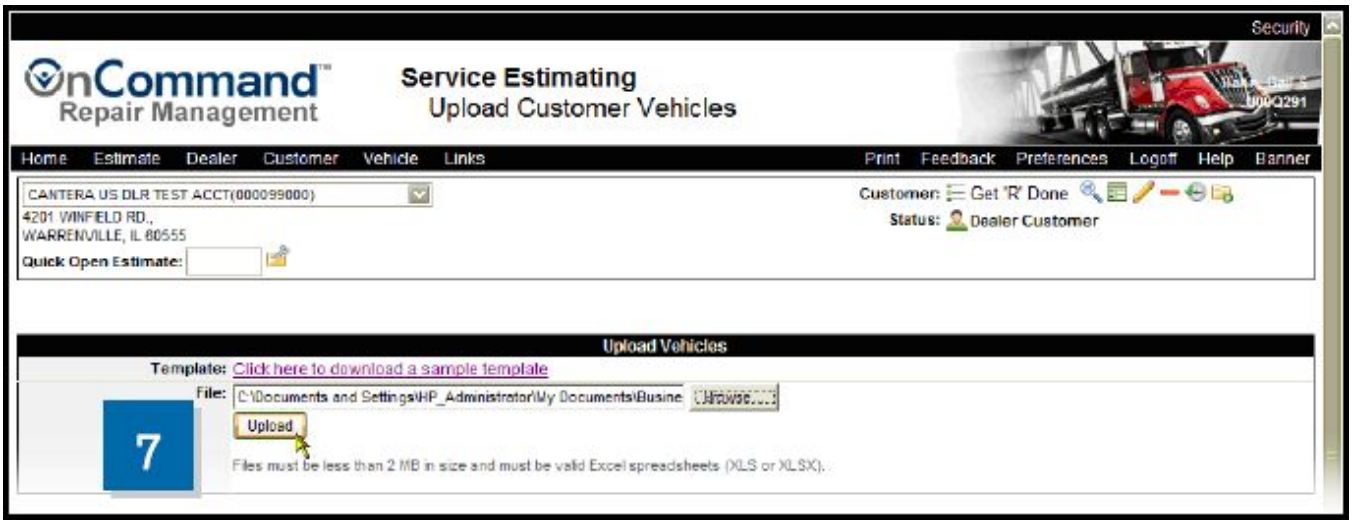
5. Vehicles must be uploaded using an Excel spreadsheet. To retrieve the template, click the **Click here to download a sample template** link.



6. This will open a File Download pop-up screen asking you to open or save the file. When you click the Open button, the Excel template opens.



7. After you have entered the vehicles into the template, you can upload it by locating the file using the Browse button and then clicking the Upload button



4.8. ADDITIONAL LMS TRAINING

- Repair Management: Service Estimating Introduction for Dealer Administrators
- Repair Management: Service Estimating Introduction for Service Advisors
- Repair Management: Using Service Estimating for Dealer Administrators
- Repair Management: Using Service Estimating for Service Advisors

5. SUPPORTING FORMS

5.1. PROJECT CONFIRMATION 3.0 WORKSHEET

PROJECT CONFIRMATION 3.0 Worksheet

1. Was a Health Report taken and uploaded to the service portal when the vehicle arrived?

   Yes No

2. Review the vehicle's History.

   a. Are there any Open "Managed Repairs"? Yes No

   b. If yes, list Open Managed Repairs here_____

   c. Review History in both the Dealers system and "Warranty History"

   d. Was this vehicle in for <u>any</u> repairs in the past 90 days? Yes No

      If yes, review the claims. Was the vehicle in for the same concern?

      Yes No

      Notes:

      _____

      _____

   e. Review the "Case History" for this vehicle.

      Are there any relatable Case Files for this vehicle? Yes No

      Notes:

      _____

      _____

3. Return to the Health Report taken when this vehicle arrived and use the Fault Code Ranker to Rank the Engine Fault Codes.

   a. What is the first Ranked Fault Code? _____

   b. List any other Fault Codes in the order you ranked them

      _____

      _____

      _____

      Notes:

      _____

      _____

5.2. TECHNICIAN PROJECT CONFIRMATION 3.0 WORKSHEET

Technician Project Confirmation 3.0 Worksheet

4. What is the first Fault Code you are going to diagnose? _____

5. Did this complete all of the customers concerns? Yes No

6. If not what is the next Fault Code you are going to diagnose? _____

7. List any other codes, in ranked order, that were in the Health Report.

_____

_____

_____

Notes:

_____

_____

_____

8. Did you follow the Diagnostic Steps and/or the Elemental Steps to repair this vehicle? Yes No

9. Did you locate any issues with the published information to diagnose or repair this vehicle?

Yes No

   a. If yes did you submit feedback to address the issue? N/A Yes No

      i. If No please do so now.

10. Did you clear all codes after the repair and take a "Clean Health Report"?

Yes No

11. If No –Do so now.

5.3. SAMPLE FORM: SHOP TURNOVER REPORT

ABC INTERNATIONAL TRUCKS

SHOP TURNOVER REPORT

Date _____

Shift _____

Hot Topics

1S	2S	3S	4S	5S	6S	7S	8S	9S	10S

1N	2N	3N	4N	5N	6N	7N	8N	9N	10N

5.4. SAMPLE FORM: CUSTOMER LOG AND READY LIST

CUSTOMER LOG AND READY LIST

TAG #	RO #	CUST. NAME	PHONE NUMBER & CONTACT NAME	COD/CHG. WARR.	UNIT #	DATE IN	TECH ASSIGNED	DATE COMP.	DATE CUST. CALLED	PICKED UP BY:	DATE:
			/			/ /		/ /	/ /		/ /
			/			/ /		/ /	/ /		/ /
			/			/ /		/ /	/ /		/ /
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5.5. SAMPLE FORM: TECHNICIAN STATUS

Technicians Names —>																									
Triage - International Engines																									
International Maxxforce 7																									
International Maxxforce 11 / 13 / 15																									
International N13 SCR																									
International DT / 9 / 10																									
International DT / 9 / 10 SCR																									
Triage - Cummins Engines																									
Cummins Engine Medium																									
Cummins Engine Heavy																									
Triage Chassis																									
Chassis Cab general																									
Electrical (body controller, wiring)																									
HVAC (cab)																									
HVAC (aux)																									
Brakes																									
Air brakes																									
Hydraulic brakes																									
Drivetrains (driveshaft, rear end)																									
Clutch																									
Automatic Transmission																									
Automated Transmission																									
Manual Transmission																									
Misc.																									
Fifth wheel																									
Frame shortening / lengthening																									