

Service Management Best Practices



Navistar, Inc.

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1	THE 6 STEPS PROJECT 3.0							
	\checkmark	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.					
		Use the Diagnostic steps and SRT Elemental steps for every repair.						
		6	Complete a Health Report once the repairs/service is complete.					
	INTERNATIONAL		NAVISTAR					

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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)

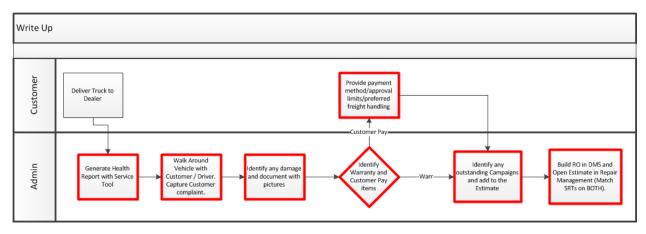
1.1.4. Interaction

- 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

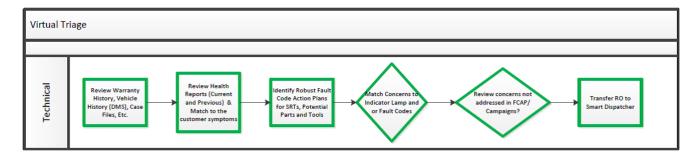
- 1. Service Writer
- 2. Smart Dispatcher
- 3. Service Supervisor
- 4. Service Manager

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

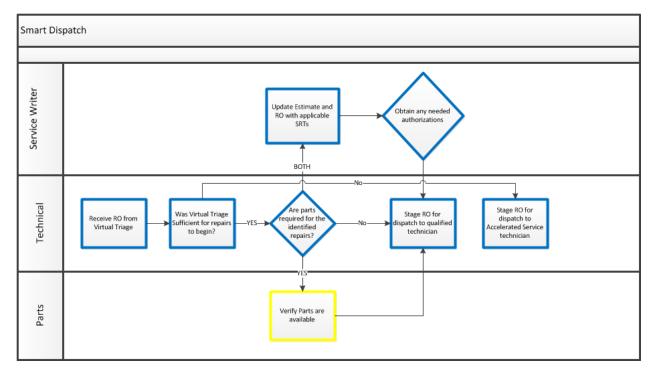
- 1. Service Writer
- 2. Service Supervisor
- 3. Service Manager
- 4. Service Technician
- 5. Parts Manager

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

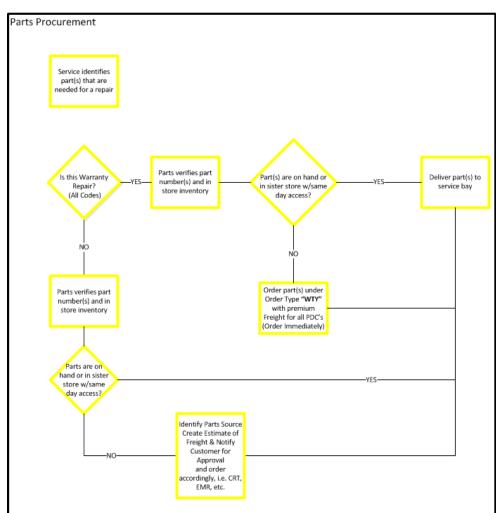
- 3. Knowledgeable with the parts department layout
- 4. Good communication skills
- 5. Good computer skills

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:

 Identify Warranty Coverage First
 Only use inventory at Repairing location or same day sister store
 Order all remaining warranty parts using "WTY" order type with VIN and Premium Freight
 Order Parts immediately
 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 Portalsm
 - 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:



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.



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.
 - 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

International Service Porta	al Home		
Home Publications Service Reference Write Up	Dealer Warranty Support		
	Administration	Diamond Edge Dashboard	Service Development
/hat's New	Dealer Search	Diamond Edge Dashboard	DPF Cleaning Support
<u>Repair Management DMS Integration Repair Management</u> This article provides information on the current status of t	Update Your Service Information	Service Marketing	Service Development Tools
Take the Technician Rodeo Pre-Test Today! - Post Date:	Update Dealer Locator	Preventive Maintenance	Parts and Service Expo
REMINDER: The 2016 Technician Rodeo Qualifying Exal submit a Dealer Education Case File asking for assistanc	Service Level Authorization	Customer Solutions US/Can	Accelerated Service
SHELL ROTELLA FREE OIL FOR LIFE PROMOTION (U Click here for details about how your customer could win	Service Level Authorization	Customer Solutions LA/Caribb	TMC Resource Center
Vouchers and Instructor-Led Training Courses Please see this iKNow document for instructions describing	LA/Carrib	Print Materials	Repair Management
Eaton® Procision [™] Transmission Training Information - Information for Eaton® Procision [™] Training courses.	Training	US Dealer PrintPortal	Repair Advocate Portal
EPA 2010 & 2013 MaxxForce 7 Information Update - Pos	Learning Management System	Canadian Dealer PrintPortal	Contact Information
Information: New training course available for the EPA 20 <u>NEW Cummins® EDS 5.7 Customer Uptime Features - F</u>	Dealer Education	Dealer PrintPortal FAQs	Technician Recruitment
Click the link to learn more about the Cummins® Expert I 2016 Parts and Service Expo - Post Date: March 2, 2016	Project Confirmation 3.0	Decal Order Form	OnCommand Connection
Please join us for the 2016 Parts and Service Expo for Pa Introducing: The International® Link - Post Date: March 2	Project Confirmation 3.0		Navistar Brands
Available now for Pre-Order Eaton Procision Transmission Service Tool Kit			Continental Mixers
Essential service tool kit to support 2016 Medium-Duty Tr			MILCOTS
N13B EGR Valve Diagnostics: 2659-10 Fault Code - Pos Revised diagnostics/FCAP for 2659-10 fault code on N13			
SR4 Renewal fee and Annual EZ-Tech Software Renewa The Eaton SR4 Renewal fee and the Annual EZ-Tech Soft	ware Renewal tee are reflected as separa	ate line items in your March statement	TAV-1 t. Please note these are considered essential ship

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

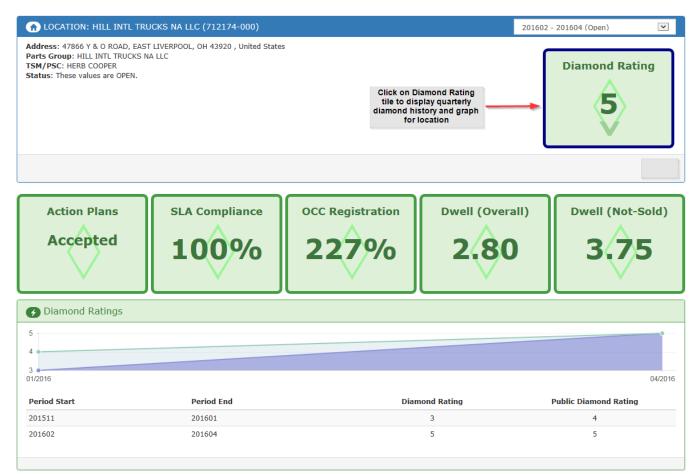
SUPPORTING INFORMATION

Dealer Account	Location Name	HILL INTL TRUCKS NA LLC	Show All Regions V	Show All CSEs/TSMs V	Show All Locations
712174-000	HILL INTL TRUCKS NA	HILL INTL TRUCKS NA LLC	NORTHEAST	HERB COOPER	Truck Only
712174-001	HILL INTL TRUCKS NA	HILL INTL TRUCKS NA LLC	NORTHEAST	HERB COOPER	Truck Only
712174-002	HILL INTL TRUCKS NA	HILL INTL TRUCKS NA LLC	NORTHEAST	HERB COOPER	Truck Only
712174-051	RALICH TRUCK CENTER	HILL INTL TRUCKS NA LLC	NORTHEAST	HERB COOPER	Truck Only
712174-052	R-WAY TRANSPORT, INC.	HILL INTL TRUCKS NA LLC	NORTHEAST	HERB COOPER	Truck Only

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- 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

🚊 DEALER GROUP: HILL INTL TRUCKS NA LLC	
Status: These values are OPEN.	
IMPORTANT : The overall Group level diamond rating is based on a weighted aggregate of the diamond ratings of its child locations. It is <u>not</u> directly tied to the dwell or not-sold dwell at the Dealer level.	Diamond Rating
Quarterly Date Range 201511 - 201601 (Final) Selection Menu	
201602 - 201604 (Final) 201605 - 201607 (Open)	

- 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

Action Plans								
Action Plans need to be submitted and approved for each quarter of the fiscal year, or a more comprehensive plan can be submitted to cover an entire year. The table below shows the history of Action Plan submittals for this location.								
Case Number	Period Start	Period End	Submission Date	Closure Date	Requirement Satisfied			
3280015	1/1/2016	1/31/2016	1/27/2016	1/29/2016	Yes			
	12/1/2015	12/31/2015			No			
Hyperlink to case file	11/1/2015	11/30/2015			No			
				Click here to create a new action plan case file.	Create New Plan Refresh			

- 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

Service Level Agree	ement Compliance	2					
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 on the training front throughout the year. Training must be completednot just scheduledprior to the end of the 4th quarter.							ess is expected
Criteria	Column shows status of metrics						
DIA Certification -Edge Ref		Pass	Is Active	Percent Controlled	Sim 'L' or Above	Working Queue	Is Exempt
-Dealer Ref -Dealer Ref	11		Yes	86.3%	Yes	Yes	No
Training: re	Hyperlinks to ference materials	Tentative Pass	Requirem	ent Minin	num Needed	Trained S	atisfied
- Cummins			Cummins E	DS 6		1 0	10
This row appears red because	this location is behind o	'n	HVAC	2		0 0	10
progress towards achieving the yearly training goal. For each quarter that has passed 25% of the training is expected to be complete.			N9/N10/N1	13 SCR 2		1 1	10
DPF Cleaner Availability		Pass					
Hours of Operation		Pass			Detailed		
Tools Certification		Tentative Pass	Tentative Pass			measurements for metrics	
Accelerated Service Agreeme	nt	Pass			metrics		
							SLA Info Site

- · 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

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		
/1/2016	3/1/2016	1	5	15%	500%	Yes		
/1/2016	2/1/2016	0	10	15%	1000%	Yes		
/1/2016	1/1/2016	7	5	10%	71%	Yes		
2/1/2015	12/1/2015	13	82	10%	631%	Yes		
1/1/2015	11/1/2015	30	151	10%	503%	Yes		
							Refre	

- 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

Claims that exceed the th		uring this period. arked in orange. Cl	aims that exceed the t	hreshold by mor	e than dou	ble are marked	in red.			
8 6 4 2 15/2015 06/2015	07/2015		09/2015	10/2015	11/2015	12/2015	01/2016	02/2016	03/2016	04/20
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
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
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

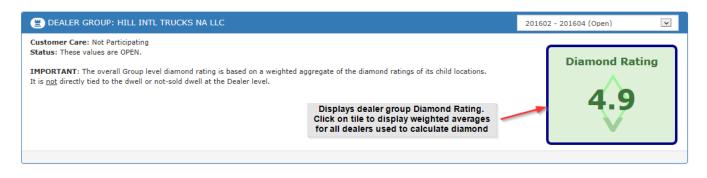
- · Users will only see the dealers they have access to
- Service managers normally have access to one location
- Service directors and up have access to multiple locations
- · Clicking on the account number will take you to the individual dealer page
- Clicking on the dealer group name will take you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

Dealer Account	Location Name	HILL INTL TRUCKS NA LLC	Show All Regions ∨	Show All CSEs/TSMs	Show All Locations
712174-000	HILL INTL TRUCKS NA	HILL INTL TRUCKS NA LLC	NORTHEAST	HERB COOPER	Truck Only
712174-001	HILL INTL TRUCKS NA	HILL INTL TRUCKS NA LLC	NORTHEAST	HERB COOPER	Truck Only
712174-002	HILL INTL TRUCKS NA	HILL INTL TRUCKS NA LLC	NORTHEAST	HERB COOPER	Truck Only
712174-051	RALICH TRUCK CENTER	HILL INTL TRUCKS NA LLC	NORTHEAST	HERB COOPER	Truck Only
712174-052	R-WAY TRANSPORT, INC.	HILL INTL TRUCKS NA LLC	NORTHEAST	HERB COOPER	Truck Only

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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



Ø 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	D	iamond 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

Action Plan	SLA Compliance	OCC Registration	Dwell (Overall)	Dwell (Not-Sold)
Action Plans				
	submitted and approved for each quarter of the te location for the selected time period.	e fiscal year, or a more comprehensive plan c	an be submitted to cover an entire y	ear. The table below shows the
Location Code	Location Name			Action Plans Satisfied
712174-000	HILL INTL TRUCKS NA LLC	Clicking the hyperlink will ta you to the individual deale		Yes
712174-001	HILL INTL TRUCKS NA LLC	location		Yes
712174-002	HILL INTL TRUCKS NA LLC			Yes
712174-051	RALICH TRUCK CENTER			No

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)

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 completednot just scheduledprior 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.								
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

octual sales and registrat	ion numbers are shown below.				
	ounts for the specified location are a reflection of the	numbers at the primary location, as the specified lo	ocation did not have an	y sales or registra	tions of it's o
luring the period in ques	tion.				
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	View dealer group OCC data metrics		0	Yes*
	HILL INTL TRUCKS NA LLC		0	0	Yes*
712174-002					

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

	n of the average amount of time at the specific location during th		at each location,	based on claims (processed durin	g the selecte	d period. A valu	e of 'NV' reflects	the fact that
he chart shown below is	a measure of the aggregate dwe	II for the entire deal	ler over the last :	12 months.					
	graph will only reflect data	since							
	Individual locations will ha				•			•	
2	year dwell history								
5/2015 06/2015	07/2015 08/2015	09/2015	10/2015	11/2015	12/2015	01/2016	02/2016	03/2016	04/20
								Adjusted	
								-	A 11 A 1
Location Code	Location Name						Dwell	Claim Count	Satisfied
Location Code 712174-000	Location Name	s.	View groo	oup dwell data	at a		Dwell	Claim Count	Yes
	Lototton nume		glance.	For full location	on				
12174-000	HILL INTL TRUCKS NA LLC	· ·	glance. claim		on		2.8	174	Yes

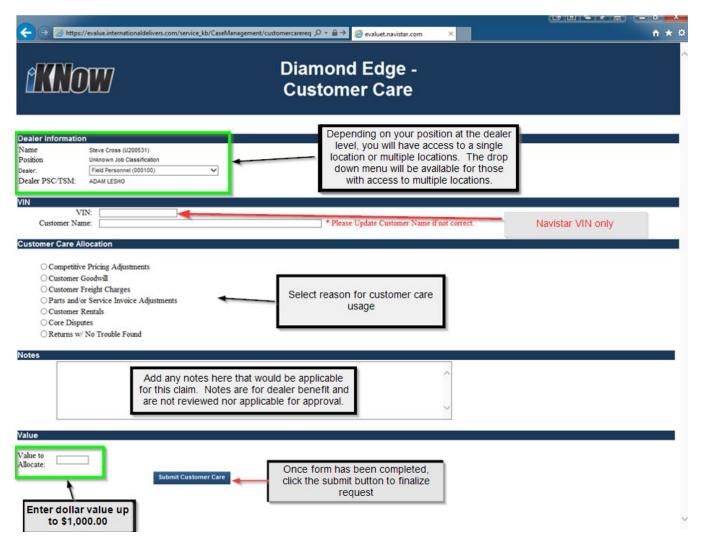
4.1.10. Customer Care Funds Usage

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.

Search Cases	
Case Type All Tech Services IApprove Customer Service Repair Advocate Parts Inquiry Tool Request Tool Order Dealer Admin	Select only iApprove cases type
Feedback Parts Critical Parts Support	
Status Both List Type My Dealer's Cases Dealer Name: Start Date: 02/01/2016 End Date: 02/29/2016	Search
Search for a Case: Case # V	

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."

Home			
, , , , , , , , , , , , , , , , , , , ,	Convice Marketing	Convice Dovelonment	
Dealer Search	Preventive Maintenance	DPF Cleaning Support	
Update Your Service Information	Customer Solutions US/Can	Service Development Tools	
Update Dealer Locator	Customer Solutions LA/Caribb	Parts and Service Expo	
Service Level Authorization	Print Materials	Accelerated Service	
Service Level Authorization	US Dealer PrintPortal	TMC Resource Center	
LA/Carrib	Canadian Dealer PrintPortal	Repair Management	
Training			
Learning Management System			
Dealer Education			
Project Confirmation 3.0		Navistar Brands	
		Continental Mixers	
		MILCOTS	
		TAV-1	
ration 4 Body Controller, vehicle feature	codes unique to vehicles built in 2016		ud rate I
	Administration Dealer Search Update Your Service Information Update Dealer Locator Service Level Authorization LA/Carrib Training Learning Management System Dealer Education Project Confirmation 3.0	DealerWarrantySupportAdministrationService MarketingDealer SearchPreventive MaintenanceUpdate Your Service InformationCustomer Solutions US/CanUpdate Dealer LocatorCustomer Solutions LA/CaribbService Level AuthorizationPrint MaterialsService Level AuthorizationUS Dealer PrintPortalLA/CarribCanadian Dealer PrintPortalTrainingDealer PrintPortal FAQsDealer EducationProject Confirmation 3.0	Dealer Warranty Support Administration Service Marketing Service Development Dealer Search Preventive Maintenance DPF Cleaning Support Update Your Service Information Customer Solutions US/Can Service Development Tools Update Dealer Locator Customer Solutions LA/Caribb Parts and Service Expo Service Level Authorization Print Materials Accelerated Service Service Level Authorization US Dealer PrintPortal TMC Resource Center LA/Carrib Canadian Dealer PrintPortal Repair Management Training Dealer PrintPortal FAQs Repair Advocate Portal Learning Management System Decal Order Form Contact Information Dealer Education Project Confirmation 3.0 OnCommand Connection Project Confirmation 3.0 Continental Mixers Continental Mixers

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"

								My FavoriteBrand P	eferences Sites Lo	ogoff
			a tional vice Port	tal Hom	e					
Hon	e Publications	Service Reference	Write Up	Dealer	Warranty	Support		Chassis / VIN Number		View
						Feedback		FAQ and Support		
What	s New					Service Portal Feedback		Town Hall replay	•	
1	Z-Tech Launcher L	Jpdate to Support 500K -Tech Launcher to suppo	Vehicles	islas is see	, available in t			Systems Updates	Lets's 0	to this!
0	afety Recall 14517							Change Password	dick	here
(laims for 14517 wit	has been superseded o th failure dates of 2/2/20						Load Graphics Viewer		
	afety Recall 14518 afety Recall 14518	has been superseded o	n 2/3/2016 b	y safety rec	all 15V-868/2			Employee Registration		
		th failure dates of 2/2/20 ctor-Led Training Course		e, will be pr	ocessed by th	e warranty group.				
Ē	lease see this iKNo	ow document for instructi		ng what the	voucher syst	em is and how it works. Screensh	ots are included for e	ach step in the process.		
		ce Program - UPDATE rmation for the Program	and Billing ha	ave been u	pdated, Pleas	e see iKNow article IK2900068			3	-U
0	pecial Tools Billing	and Freight info								
C	uantity, part# and E	Net and freight charges). This docun	ment will be	emailed to the	e tool requestor and it will be inclu	ded in the box with th	de the details you are looking for (tool ne tools, so your personnel will no longer need	PROJECT CON 3.0 D	WELL TIME
								t does today, with a debit to your open tomer does not have visibility to your cost.	R	REDUCTION
٦	hese instances are	minimal and are already	y handled via	a case file, s	so we can easi	ly make this adjustment. In these	instances, the shippir	ng invoice can be provided to you via case e shipping invoice e-mailed to them.		01/
0	liamond Edge Dash	nboard				5			NavKal iKNow	OK OK
								ugh the Diamond Edge link on the Service ments through the feedback link in the	DLB	ок
	ononnance Statem	on page. Galculation to		ago min be	man200 011 2/	Torzo to. T touso teel tree to suggi	sociadas for improver	nonto anough the loousdek link in the	Health Renor	+ OK

3. Select "Feedback Type details"

4. Fill out form and submit

Feedback Case Submission NAVISTAR[®] Do not use this form if you require technical assistance - conduct a iKNow Search and if the solution cannot be found start a case file Email Address : Doug.Bradley@Navistar.com Douglas Bradley * Name: Phone City Select One Fault Code Action Plan (FCAP) Dealer Education/Training (Claim) KNow - Search and Case Management Service Portal Service Portal - Data Updates Product Review Center Parts Returns Recalls Repair Management Service Tools Standard Repair Times (SRT) Technical Publications Managed Repairs Managed Repairs Warranty Appeals Warranty Adjustments PDI Issues/Complaints OnCommand Connection Warranty Adjustments POI Issues/Complaints OnCommand Connection Warranty Adjustments POI Issues/Complaints OnCommand Connection Warranty Adjustments POI Issues/Complaints OnCommand Connection Warranty Adjustments Project Confirmation Action Plans for Diamond Edge Program Feedback Type Details * Dealer: Field Personnel (000100) Feedback Type Document Update Detailer Explanation se... Attachme eneficial to the process Submit Clear

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"

CONTERNATIONAL D	rnational ervice Portal Home						
Home Publications Service Reference	e Write Up Dealer Warranty	y Support					
	Vehicle	Parts					
What's New	Vehicle Information	Parts Catalog					
Vouchers and Instructor-Led Training Cou		Parts Online					
Please see this iKNow document for instru <u>2016 Revision Service Program - UPDATE</u>	E VIN Search	VIN Search uded for each step in the proce					
NEW!!! Contact information for the Program	Wehicle Info Usage Report						
Navistar is pleased to inform you that effect document will be emailed to the tool reque			will provide the details you are looking for (tool quantity, need to call or open case files to obtain this information. I				
only and your billing will proceed just as it not have visibility to your cost. These insta	de Repair Management	Ropair Management					
Recommendation: Instruct whomever order			idjustment. In these instances, the shipping invoice can b ants the shipping invoice e-mailed to them.				
Diamond Edge Dashboard The Diamond Edge dashboard is now ava	ailable for our dealers and Navistar per		an also be accessed though the Diamond Edge link on the Service Per				

The Diamond Edge dashboard is now available for our dealers and Navistar personnel to view. The dashboard can also be accessed though the Diamond Edge link on the Service Per Diamond Edge will be finalized on 2/15/2016. Please feel free to suggest ideas for improvements through the feedback link in the dashboard.

NavKal and PocketMaxx can now be used in addition to Nets to perform this recall calibration.

Diamond Edge Action Plans IK2500291 has been released outlining proper submission of Diamond Edge action plans.

IK2500291 has been released outlining proper submission of Diamond Edge action plans

If you or your customers require support orinated miorination If you or your customers require support with the OCSI USB, please email the support team at: OCSIUSBSupport@Navistar.com NOTE: Email accounts; OCSI_pubs_feedback@navis OCSI_DVD_feedback@navistar.com will be retired Friday. February 26. 2016.

- 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

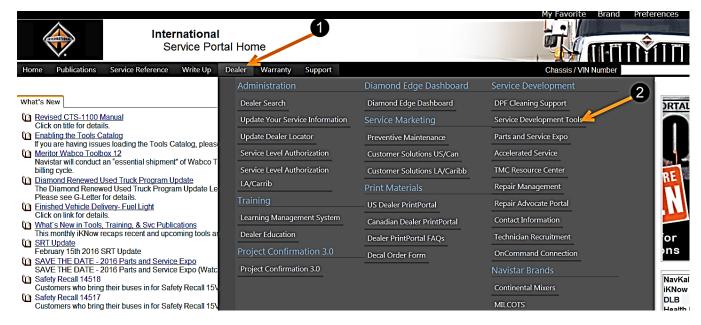
											My Favorite	Brand Pre	terences S	ites Logoff	
International Vehicle Information	ion Usa	age											Î	1717	View
Home Publications Service Reference Write Up De	ler Wa	irranty Sup	port								Chassis / \	IN Number			View
Dealer Account - Location: Month and Year. Dealer Detail Enter Dealer	View	Submit							Exce	ort to el, add ers to st view		> Exp	ort To Excel		
Business Name Account and						Shipping Nan	ne:								
Business Addr Location		Click on]			Shipping Add	ress:	E							
Phone Number		olumn Title				Fax Number:		0 -							
Toll Free Number: () -		to put in													
		order													
Name User_ID Job_Class	Alert	<u>Summary</u>	<u>Managed</u> Repairs	Warranty Coverage	<u>Health</u> Report	<u>Warranty</u> <u>History</u>	<u>Case</u> History	ECAP	Components	<u>Serial</u> Numbers	<u>Cal</u> Scorecard	<u>Details</u>	iKNow Search	iApprove	iRequest
SE020, Bus Technician	4	25	2		7	2	1	2		1					
SE005, Service Writer		20			2									1	
AD003, Warranty Administrat	or 2	8													
SE008, Service Technician	_	6	2		5	1	2						1		
SE020, Bus Technician SE005, Service Writer		1			p.										
	0	26													

4.5. QUICK REFERENCE GUIDE TO SERVICE CENTER OPERATING FORMS

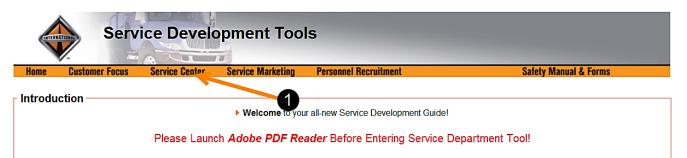
1. Go to the International[®] Service Portal[™] Home Page

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"



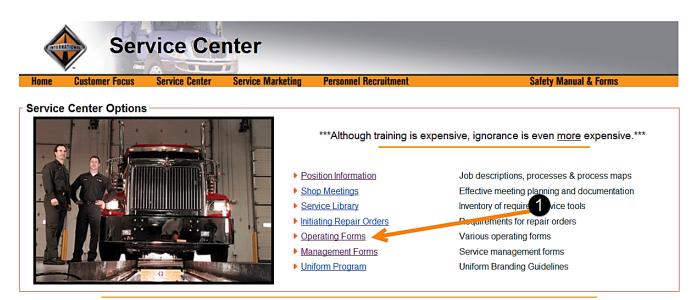
This Service Development Tool has been newly updated and redeveloped to help you improve and maintain customer satisfaction while increasing your dealership's profitability.



The service department is an important and essential component of any dealership. It should promote and build trust by cultivating open and honest relations with both customers and other dealer departments. As leaders of their service departments, Service Leaders should strive for efficiency and profitability. This is achieved through productive staffing, customer retention, technician training and quality workmanship while improving productivity and reducing costs in order to meet your department's goals.

Service Leaders play a crucial role in achieving the highest customer satisfaction by performing their duties in accordance with current vendor practices and International® policies and procedures. This manual is intended to guide Service Leaders in the performance of their duties by clarifying procedures and standardizing processes.

4. Select "Operating Forms"



5. Select appropriate form

	Service	e Cer	nter -	Оре	erating For	rms			
Home Cu	ustomer Focus Servic	ce Center	Service Ma	arketing	Personnel Recruitment	New Vehicle Process	Safety Mar	ual & Forms	Back
perating F	Forms Turn Over Report (E	xample):	PDF		▶ Tech	nical Service Call Sheet:	PDF	EFF I	
	Write-Up Inspection	on Form:	POF		Engine Perf	formance Questionnaire:	PDF		
	Customer Log/Re	ady Lis <mark>t</mark> :	PDF		•	Electrical Questionnaire:	PDF		
	Comeback Not	tification:			Vibrat	ion Issue Questionnaire:	POF		
	Monthly Comb	ack Log:	POF	×	• (Overheat Questionnaire:	PDF		

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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:

i	OnCo Repair	mma Managen	nd [™] nent	Servi Hor	ice Estimating me	1						array and a second s
Return to home page	WINFELD ROA RENVILLE IL 6 COpen Estim	RNAL ACCT(0000 AD, 60555	099212)	hicle Lin	Vehictor.#= Owner: VIII: Engine:				Print Feedback P Customer: 📃 🄍 🕂 Status:	references Log	goff Help Bar	Access available Links
Access Estimate functions		Account		0 / 6	<u>Search</u> <u>Vehicle</u> 2000 - 9200 - 9200 : 9200 : 38A 6X4 - DET DSL SERES- 80 430/470HP 1800PM-		Unit	Customer Test International	<u>Status</u> Working	<u>Assigned</u> Hahn, Gail	<u>Changed</u> 2010-07-16	Access Vehicle functions
Access Dealer functions		post (or closure)			Create New Estimate F Customer type is deale Unread fiet note press	For Custo		Trucking	Create New Esti	imate For Vehicle s service partner		Access Customer functions

4.6.2. Managing My Dealer Information

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

Sepair Management	Service Estimating Operations Not Sold Report				Ha	Security
Home Estimate Dealer Customer Ve US CANTERA INTERN 4201 WINFELD ROAD WARRENVILLE, IL 605 Quick Open Estimat Duick Open Estimat Duick Open Estimat	e 1 Operations: Quoted Not Sold	Print	Feedback	Preferences	Logofi Help	Banner

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

Home Estimate Dealer Customer Vehicle Links Print Feedback Preferences Logol Help Banner US CANTERA INTERNAL ACCT(00009212) Image: Control of the contr	Repair Management	ervice Estimating Dealer Profile Maintenance	Security Security
Dealer Info Seles Tax Labor Rates Fees Logo Uptod Dealer Information Enter phone numbers in this format (country code]/area code]-(phone numbers in this format (country code]/area code]-(phone number) If you have a local web- based particular particul	US CANTERA INTERINAL ACCT(000099212)	2	Preferences Logoff Help Banner
Local Part Lookup URL: The token '@PARTNO' above will be replaced with the actual part numbers when using the application This estimate is subject to teardown and inspection and is valid for 30 days from date above. I, the undersigned, authorize you to perform the repairs and furnish the necessary materials. I understand any costs verbally quoted are an estimate only and not binding. Your employees may operate vehicle for inspecting, testing and delivery at my risk. You will not be responsible for loss or damage to vehicle or articles left in the Lowest Customer Discourt: Labor Rate Compliance Calcule Sample SRT Time: 'SRT With Mark Up: 'User and furnish to necessary materials. I understand any costs will not be responsible for loss or damage to vehicle or articles left in the customer Discourt: 	2b Phone Number:	Dealer Information 011 - 630 - 7531122	this format - [county code]-[area code]- [phone number] - If you have a local web- based part lookup you can integrate that lookup into the Estimate page, example: - http://www.mysite.com/part.cp
Estimate Notes: days from date above. I, the undersigned, authorize you to perform the repairs and furnish the necessary materials. I understand any costs verbally quoted are an estimate only and not binding. Your employees may operate vehicle for inspecting, testing and delivery at my risk. You will not be responsible for loss or damage to vehicle or articles left in t. Sample SRT Time: SRT With Mark Up: 1 Warranty Labor Rate: 50 SRT Mark Up Pct: 4 Lowest Customer Discount: 36	Local Part Lookup URL:		 The token '@PARTNO' above will be replaced with the actual part numbers
Labor Time Roundling: Round to tenth of hour 2	Estimate Notes:	days from date above. I, the undersigned, authorize you to perform the repairs and furnish the necessary materials. I understand any costs verbally quoted are an estimate only and not binding. Your employees may operate vehicle for inspecting, testing and delivery at my risk. You	Sample SRT Time: SRT With Mark Up: Warranty Labor Rate: 50 SRT Mark Up Pct: 4
	Labor Time Rounding		Chiculate

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.

⊛nC	omm	and	Se	rvice Estima	ating			1 Provention	Security
Repai	ir Manag	gement			Maintenance		STR		000291
Home Estin	nate Deale	r Customer	Vehicle	Links		Print Feedback	Preferences	Logoff Help	Banner
US CANTERA I 4201 WINFIELD WARRENVILLE,	ROAD,	(000099212)	~						
Quick Open Ea	timate:	2							
DealerInfo	Sales Tax	Labor Rates	Fees	Logo Upload					
					Sales Tax				
		Parts Sales T	ax: 5	%					
	3	Labor Sales T	ax: 4	%					
		Misc Sales T	аж: З	%					
		Other Sales To	ax: 0	%					
				ль	Save Cancel				

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

On C Repair	omm ir Manag	and [™]		ervice Estimatin Dealer Profile Ma		Security 2 Philipping
Home Estin	mate Dealer	r Customer	Vehicle	Links		Print Feedback Preferences Logoff Help Banner
US CANTERA II 4201 WINFELD I WARRENVILLE, Quick Open Es	IL 60555	(000099212)	Fees	Logo Upload		
D'Color Inte	Cure in	COURTER			Labor Rates	
	Α	50.0	A 00			Please verify that you have six skill levels
	в	70	00 B			with proper rates
	с	40.0	00 C			 The skill rates may have been assigned default values
	D	33	00 D			 If you do not have variable labor rates,
Bod	ty Shop		00 Body S	Shop		then assign the same rate to all levels
Т	raller		00 Traller	r		
	G	\$ 50	00 Curre	at warranty rate		

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

©nCommand [™] Repair Management	Service Estimating Dealer Profile Maintenance				Security
Home Estimate Dealer Customer	Vehicle Links. Print	Feedback	Preferences	Logott H	elp Banner
US CANTERA INTERNAL ACCT(000099212) 4201 WINFIELD ROAD, WARRENVILLE, IL 80555 Quick Open Estimate:	5				
Dealer Info Sales Tax Labor Rates	Fees Logo Upload				
	Shop Supply Fees		216	-	
Variable 🛞	5 % will be applied to the total of Parts and Labor 💟 with a minimum charg	ge of 15	but not to excee	d 75	
Fixed O	Annaliseury & destablis Perer Transformation and				

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

Sepair Managemen	Service Estimating Dealer Profile Maintenance	Security A
Home Estimate Dealer Cust	r Vehicle Links Print	Feedback Preferences Logoff Help Banner
US CANTERA INTERNAL ACCT(0000992 4201 WINFELD ROAD, WARRENVILLE, IL 60555 Quick Open Estimate:	Eees Logo Upload	
	Shop Supply Fees	
Variable	5 % will be applied to the total of Parts and Labor with a minimum charge	e of 15 but not to exceed 75
Fixed	Always apply a fixed shop fee of Labor le a	
Variable	None	je of but not to exceed
Fixed	Always apply a fixed shap fee of 15 to the total estimate amount	
	Seve Cancel	

- 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

Sepair Management	Service Estimating Dealer Profile Maintenance	Security 2
Home Estimate Dealer Customer	Vehicle Links	Print Feedback Preferences Logoff Help Banner
US CANTERA INTERNAL ACCT(000099212) 4201 WINFELD ROAD, WARRENVILLE, IL 60555 Quick Open Estimate:	Fees Logo Upload	
	Oproad Edgo	
7b	a 7a	

4.6.3. Managing/Uploading Dealer Specific Parts

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

Home Estimate Dealer Customer Vehicle Links Print Feedback CANTERA US DLR TE Dealer Info Maintenance Customer:	
CANTERA US DLR TE Cost of the Heinfelder	
201 WINFELD RD, VARRENVILLE, IL 505 Sales Tax Maintenance Owner: Status: VARRENVILLE, IL 505 Labor Rate Maintenance VIN: buick Open Estimat Shop/Misc Fee Maintenance Engine: Upload Logo Upload Logo	Υ. T
My open estima Operation Mainterince	

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."

Since Repair	ommand [™] r Management		ce Estin s Mainte					R			Security
Home Estim	ate Dealer Customer Ve	hicle Link	s				Print Fee	dback Prefere	ences Loo	off Help	Banner
2	R TEST ACCT(000099000) D., 50555 imate: 2005 • 7 records were found Jpload Parts										
2000 C 1000										N 4 1	
Number	Name / Vendor / Description	Retail	Trade	Major Fit	National Flt	Dealer Net	Fixed	Fixed Price	Core	Edit	Delete
	Name:										

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

SnC Repai	ommand [™] r Management		e Estin s Mainte					A REAL			Secur National
ome Estim	nate Dealer Customer Ve	ehicle Link	s				Print Feed	dback Prefer	ences Logo	off Hel	p Bann
ANTERA US D 01 WINFIELD R ARRENVILLE, I uick Open Est	L 80555										
ealer Parts	 7 records were found Upload Parts 									N 4	1 🕨 🕅
Number	Name / Vendor / Description	Retail	Trade	Major Flt	National Fit	Dealer Net	Fixed	Fixed Price	Core	Edit	Delete
	Name: Vendor: Desc:	0.00	0.00	0.00	0.00	0.00	0.00		0.00	÷	
1234567	tester test inc. tester	0.00	0.00	0.00	0.00	0.00	10.00	Ŷ	0.00	1	Delete
13221425	rope the vendor rope	0.00	0.00	0.00	0.00	0.00	999.00	Y	0.00	1	Delete
2134567766	dvd Sony dvd	344.00	0.00	301.56	289.54	5.00	61.00	Y	0.00	1	Delete
324235435	bracket the vendor bracket	23.43	0.00	21.33	20.32	4.00	0.00	N	0.00	5	Delete
									3		

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.

Repai	omma r Managen	nent	Part	e Estim s Mainte					P		2	Loog:
ANTERA US DI	LR TEST ACCT(0000		Vehicle Link	S				Print Feed	dback Prefe	rences Log	off Hel	p Banı
ARRENVILLE, I uick Open Est	L 60555											
	12											
ealer Parts	Upload Parts									3	B4 4	1 Þ ÞI
Number	Name / Vendor	/ Description	Retail	Trade	Major Fit	National Fit	Dealer Net	Fixed	Fixed Price	Core	Edit	Delete
	Name:				1.1							Î
	Vendor:		0.00	0.00	0.00	0.00	0.00	0.00		0.00	+	
	Desc:											
	tester											-
1234567	test in c. tester		0.00	0.00	0.00	0.00	0.00	10.00	Ŷ	0.00		Delete
13221425	rope the vendor rope		0.00	0.00	0.00	0.00	0.00	999.00	Y	0.00	1	Delete
2134587768	dvd Sony dvd		344.00	0.00	301.58	289.54	5.00	61.00	Y	0.00	1	Delete
	Name: br	acket										
324235435	Vendor: th	e vendor	23.43	0.00	21.33	20.32	4.00	0.00		0.00	X-	Delete
	Desc: br	acket								-	1	
	test									1		

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

Repai	ommand [™] r Management		e Estim s Mainte								
me Estim	ale Dealer Customer Ve	ehide Link	9				Print Feed	Iback Prefere	ences Logo	off He	p Bann
ANTERA US D 01 WINFIELD R ARRENVILLE, I ICK Open Est	L 60555										
	 Update completed 										
aler Parts	Upload Parts									14	1 🕨 Di
aler Parts	Upload Parts	Retail	Trade	Major Fit	National Fit	Dealer Net	Fixed	Fixed Price	Core	Edit	1 Delete
-		<u>Retail</u>	Trade	Major Fit	National Fit	Dealer Net	Fixed	Fixed Price		Sec. S	100
	Name / Vendor / Description	<u>Retail</u> 0.00	<u>Trade</u> 0.00	Major Fit	National Fit	Dealer Net	<u>Fixed</u>	Fixed Price		Sec. S	100
	Name / Vendor / Description Name:								Core	Edit	100
	Name / Vendor / Description Name: Vendor:								Core	Edit	100

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

OnC Repai	omma r Manager	ment		ce Estim ts Mainte					- AL			
ANTERA US DI	LR TEST ACCT(000		ehide Link	S				Print Fee	dback Prefere	ences Log	off Hel	p Bann
ARRENVILLE, I lick Open Est	L 60555]										
	 Update cor 	mpleted										
aler Parts	Update cor Upload Parts	mpleted									14 4	1 10 10
aler Parts I			Retail	Trade	Major Fit	National Fit	Dealer Net	Fixed	Fixed Price	Core	Edit	1 Delete
	Upload Parts	r / Description	Retail	Trade	Major Fit	National Fit	Dealer Net	Fixed	Fixed Price		22 . 23	- S- 107
	Upload Parts	r / Description shocks	<u>Retail</u> 209.99	<u>Trade</u> 160.99	Major Fit	National Fit 150.99	Dealer Net 45.00	<u>Fixed</u> 0.00	Fixed Price		22 . 23	- Sec. 10

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

Sepair Management	Service Estimating Parts Maintenance						Se	aurity Q291
Home Estimate Dealer Customer N	ehide Links		P	int Feedback	Preferences	Logoff	Help B:	anner
CANTERA US DLR TEST ACCT(000099000) 4201 WINFELD RD., WARRENVILLE, L 60555 Quick Open Estimate:								
7 records were found							400.0	_
							1	B ∥
Number Name / Vendor / Description	Retail Trade Major Flt	National Fit	Dealer Net	Fixed Fixe	d Price Co	<u>te</u> Ed	lit Dele	rte

8. Parts must be uploaded using an Excel spreadsheet

		Security 6
Sepair Management	Service Estimating Parts Maintenance	
Home Estimate Dealer Customer	Vehide Links	Print Feedback Preferences Logoff Help Banner
CANTERA US DLR TEST ACCT(000099000) 4201 WINF ELD RD., WARRENVILLE, L 60555 Quick Open Estimate:		
Dealer Parts Upload Parts		
Townslates, Olick here to down	Upload Parts	
File:	8	
	and the set of the set to set the set of the	

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.

b)	Ele Edit	yew Inse	rt Format <u>L</u> oo	ls Data Wi	ndow Help	Adobe PDF			Type	a question for 1	help 🕌 🚽 🗗
1	2 🖬 🕘	32	🍄 🚉 🐰 📭	3-11	9	2 - 2↓	24 🙋 90% -	Arial	- 10 - E	==	ä- <u>A</u> -
	037	- 1	ŝ.								
	A	B	C	D	E	F	0	н		J	K
	Part Number	Part Nam	e Vendor Name	Description	Retail Price	Trade Price	Major Fleet Price	National Fleet Price	Dealer Net Price	Fixed Price	Core Charge
											-
5		-									
8	-		_								
	9										
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+		-	-	-							-
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		-									-

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

Service Estimating Parts Maintenance	Security
Home Estimate Dealer Customer Vehicle Links	Print Feedback Preferences Logoff Help Banner
CANTERA US DLR TEST ACCT(000099000)	
Dealer Parts Upload Parts	
Upload Parts Template: Click here to download a sample template	
10 File: Files must be less than 2 MB in size and must be valid Excel spreadsheets (XLS or XLSX)	0

4.6.4. Managing Dealer Specific Labor Operations

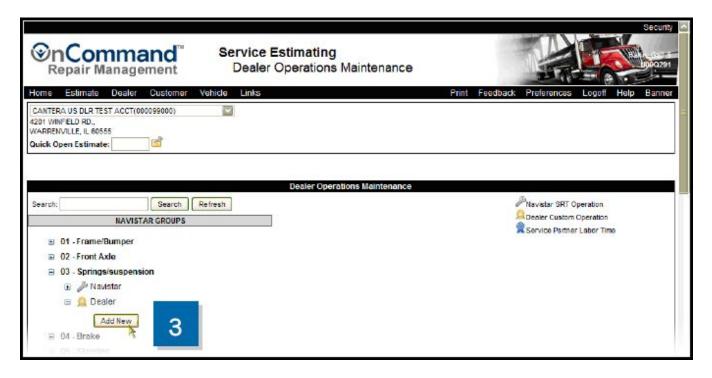
1. Select Part Maintenance from the Dealer drop-down menu

©nCommand [™] Repair Management	Service Estimating Home	1		1			Security
Home Estimate Dealer Customer Vet	ide Links		Pr	int Feedback Pre	eferences Lo	goff Help	Banner
CANTERA US DLR TE 4201 WINFIELD RD., WARRENVILLE, IL 605 Labor Rate Maintenance Quick Open Estimat Shop/Misc Fee Maintenance Upload Logo Part Maintenance	Vehicle: ::: Owner: VIN: Engine:		Cu	stomer: 듣 🔍 🕂 Status:			
Operation Maintenance	1000						
Estimate (RO) Labor Source Maintenance	Vehicle	Unit	Customer	Status	Assigned	Changed	
Customer Estimating Info	PROP - PROSTAR CILL BOX - CILL ISY						110

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

Sepair Management	Service Estimating Dealer Operations Maintenance	
Home Estimate Dealer Customer	Vehicle Links	Print Feedback Preferences Logoff Help Banner
CANTERA US DLR TEST ACCT(000090000) 4201 WINFELD RD., WARRENVILLE, IL 60555	×	
Quick Open Estimate:		
Search: Search Search NAVISTAR GROUPS	Dealer Operations Maintenance	Navistar SRT Operation
NAVISTAR GROUPS		
		Q Dealer Custom Operation
NAVISTAR GROUPS		Q Dealer Custom Operation
NAVISTAR GROUPS		Q Dealer Custom Operation
NAVISTAR GROUPS		Q Dealer Custom Operation

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

©nCommand [™] Repair Management	Service Estimating Add/Edit Operation	Security UC2291
	Links	Print Feedback Preferences Logoff Help Banner
CANTERA US DLR TEST ACCT(000099000) 6201 WINFELD RD., WARRENVILLE, IL 60555 2010ck Open Estimate:	8	
	Add/Edit Operation	
Component Group: 💿 🛛	3-Springs/suspension 🔯 🛇	Add New Group
Operation Name: Susp	ension special for July	
Variable Time : Fixed Operation Price : Fixed Parts/Labor Price : Fixed Labor Time :	Skill Level: B Labor Time(in hours): 1.5	Dealer Markup: 35 % Apply Labor Time Markup: 🕑
Operation URL:		
Exclude Operation:	checked this operation will not be available for estimating	
Exclude Operation: I II	checked this operation will not be available for estimating	
		Set Related Operation

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

Sepair Management	Service Estimating Add/Edit Operation		Security
Home Estimate Dealer Customer	Vehicle Links	Print Feedback	Preferences Logoff Help Banner
CANTERA US DLR TEST ACCT(000099000) 4201 WINFELD RD., WARRENVILLE, IL 60555 Quick Open Estimate:	9 		
	Add/Edit Operation		
Component Group:	03-Springs/suspension		
Operation Name:	Suspension special for July		
Variable Time : Fixed Operation Price : Fixed Parts/Labor Price : Fixed Labor Time :	Skill Level: 8 Labor Time(in hours): 1.50		Dealer Markup: 35 % Apply Labor Time Markup: 🗹
Operation URL:			
Exclude Operation:	If checked this operation will not be available for estimation	ating	
Standard Op Notes:		8	
	Save Cancel New Copy Operation	Delete Set Related Operation	
	6a	6b	

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

Sepair Management	Service Estimating Dealer Operations N	Maintenance		
lome Estimate Dealer Customer	Vehide Links		Print Feedb	ack Preferences Logoff Help Banne
CANTERA US DLR TEST ACCT(000099000) 1201 WINFIELD RD., WARRENVILLE, IL 60555 Duick Open Estimate:				
		ons Maintenance		Phavistar SRT Operation
Belect Related Operation for: Suspension Search: Search (Search) © 01 - Frame/Bumper © 02 - Front Axte © 03 - Springs/suspension	Refiresh Return NAVISTAR GROUPS	ons Maintenance Related	Analy Markun	
earch: Search Search	Petresh Return NAVISTAR GROUPS		Appiy Markup	Dealer Custom Operation
earch: O1 - Frame/Bumper O2 - Front Axte O3 - Springs/suspension	Operation Name	Related		Dealer Custom Operation
Search: Search	Operation Name ASSES, REPLACE T (REAR SUSPENSION), REPLACE	Related		Dealer Custom 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.

In Con Repair M	nmand [™]	Servio Hom	e Estimating	0					acurity Mazen
Home Estimate	Dealer Customer Veh	ide Link	5		Pri	nt Feedback Pr	eferences Log	off Help I	Bariner
4201 WINFIELD RD., WARRENVILLE, IL 605 Quick Open Estimat	Dealer Info Maintenance Sales Tax Maintenance Labor Rate Maintenance Shop/Misc Fee Maintenance Upload Logo		Vehicle: E Owner: VIN: Engine:			stomer: 🚞 🔍 🕇 Status:			
My open estima	Part Maintenance Operation Maintenance	dvanced S	earch						
Estimate (RO)	Labor Source Maintenance	1	Vehicle	Unit	Customer	<u>Status</u>	Assigned	Changed	
	Customer Estimating Infa ¹¹ Upload Customer Vehicles Flagt Info		PROP - PROSTAR EMUM 6X4 - CUM ISX- 5 FOOHP @1800RPM -	80 6	Get 'r' Done	Working 🔛	U000291	2010-07-09	M

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

ConComr Repair Mana	nand [®] Servic agement Labo	e Estimating or Source Maintenance			000291
Home Estimate De	aler Customer Vehicle Link	Print Fee	dback Preferences	Logoff	Help Banner
CANTERA US DLR TEST AC 4201 WINFIELD RD., WARRENVILLE, IL 80555	CT(000099000)				
Quick Open Estimate:				M 4	123 🕨 🕅
Type	Name	Description	Labor Rate 0.00	I4 4 Edit	1 2 3 Delete
		Description Alled Building Products and Subsidiaries Fleet Pricin Source	0.00	Edit	
Түре		Alled Building Products and Subsidiaries Fleet Pricin Source	0.00	Edit +	Delete
<u>Түре</u> Fleet / Service Partner	ALLIEDBLDG_LABOR_RATE	Alled Building Products and Subsidiaries Fleet Pricin Source	0.00 95.00	Edit +	Delete Delete

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

OnComr Repair Mana	nand [®]	Service Es Labor So	timating burce Maintenance				Security
Home Estimate Dea	aler Customer V	ehide Links		Print Feedback	Preferences	Logoff	Help Banner
CANTERA US DLR TEST AC 4201 (WINFIELD RD., WARRENVILLE, IL 60555 Quick Open Estimate:							
	-0		20			I N 4	123 🕨 🕅
Tura		Name	Description	n	Labor Rate	lisi 📢 Edit	
Type	Mathews Trucking	Name	Description Special pricing	<u>n</u>	Labor Rate 65.00		123 Delete
Type Fleet / Service Partner	Nathews Trucking		and the second se			Edit	
2		IOR_RATE	Special pricing Alled Building Products and Subs	idiaries Fleet Pricing	65.00	Edit	Delete

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

Repair Mana	nand [™] agement	Service Esti Labor Sou	i mating rce Maintenance			
ne Estimate Dea NTERA US DLR TEST AC 1 WINFIELD RD.,		de Links	Print Feed	back Preferences	Logoff	Help Banr
RRENVILLE, IL 60555 ck Open Estimate:	đ					
■ 58 re	cords were found				ila al	
 58 ге Туре 		ame	Description	Labor Rate 0.00	Edit	123 Delete
Ivpe			Description Alled Building Products and Subsidiaries Fleet Pricing Source	and the second sec	Edit +	
	N	RATE	Alled Building Products and Subsidiaries Fleet Pricing	0.00	Edit	Delete
Type Fleet / Service Partner	ALL EDBLDG_LABOR_	RATE TE	Alled Building Products and Subsidiaries Fleet Pricing Source	0.00	Edit +	Delete Delete

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.

Repair Man		timating urce Maintenance			
me Estimate De	aler Customer Vehicle Links	Print Feedbac	k Preferences	Logoff	Help Bann
ANTERA US DLR TEST AC DI WINFIELD RD., KRRENVILLE, IL 60555 ick Open Estimate:	CT(000099000)				
				84 4	123 0 1
Ivpe	Name	Description	Labor Rate	Edit	Delete
Type Fleet / Service Partner	Name	Description Interstate Truckway Inc. DBA Truckway Leasing Fleet Fricing Source	Labor Rate 0.00 95.00		5220
Fleet / Service Partner		Interstate Truckway Inc. DBA Truckway Leasing Fleet	0.00	Edit +	Delete
	TRUCKWAY_LABOR_RATE	Interstate Truckway Inc. DBA Truckway Leasing Fleet Pricing Source	0.00	Edit	Delete Delete
Fleet / Service Partner Fleet / Service Partner	TRUCKWAY_LABOR_RATE VATRANSPORT_LABOR_RATE	Interstale Truckway Inc. DBA Truckway Leasing Fleet Pricing Source V.A. Transport Fleet Pricing Source	0.00 95.00 95.00	Edit +	Delete Delete Delete
Fleet / Service Partner Fleet / Service Partner Fleet / Service Partner	TRUCKWAY_LABOR_RATE VATRANSPORT_LABOR_RATE XCEL_LABOR_RATE	Interstate Truckway Inc. DBA Truckway Leasing Fleet Pricing Source V.A. Transport Fleet Pricing Source Xcel Energy Fleet Pricing Source	0.00 95.00 95.00 95.00	Edit +	Delete Delete Delete Delete
Fleet / Service Partner Fleet / Service Partner Fleet / Service Partner Fleet / Service Partner	TRUCKWAY_LABOR_RATE VATRANSPORT_LABOR_RATE XCEL_LABOR_RATE GDINTEGRATED_LABOR_RATE	Interstate Truckway Inc. DBA Truckway Leasing Fleet Pricing Source V.A. Transport Fleet Pricing Source Xcel Energy Fleet Pricing Source G&D Integrated Fleet Pricing Source	0.00 95.00 95.00 95.00 95.00	Edit + / /	Delete Delete Delete Delete Delete Delete Delete
Fleet / Service Partner Fleet / Service Partner Fleet / Service Partner Fleet / Service Partner Fleet / Service Partner	TRUCKWAY_LABOR_RATE VATRANSPORT_LABOR_RATE XCEL_LABOR_RATE _GDINTEGRATED_LABOR_RATE NAVISTAR_TEST_FLEET	Interstate Truckway Inc. DBA Truckway Leasing Fleet Pricing Source V.A. Transport Fleet Pricing Source Xcel Energy Fleet Pricing Source G&D Integrated Fleet Pricing Source Navistar Test Fleet Fleet Pricing Source	0.00 95.00 95.00 95.00 95.00 0.00	Edit + / /	Delete Delete Delete Delete Delete Delete

4.6.6. Managing My Customer's Estimating Information

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

Service Estimating Repair Management	Security Datagent
Home Estimate Dealer Customer Vehicle Links	Print Feedback Preferences Logoff Help Banner
CANTERA US DLR TE 4201 WINFELD RD., WARRENVILLE, IL 605 Labor Rate Maintenance Quick Open Estimat Upload Logo	Customer: \Xi Get 'R' Done 🔍 🖻 🥒 💳 🕀 🔀 Status: 💁 Dealer Customer
My open estima Operation Maintenance	
Labor Source Maintenance Customer Estimating Info Upload Customer Vehicles Fisclinfo	

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

Sepair Management	Service Estimating Customer Estimating Information	Security
Home Estimate Dealer Customer	Vehicle Links	Print Feedback Preferences Logoff Help Banner
US CANTERA INTERNAL ACCT(000099212) 4201 WINFELD ROAD, WARRENVILLE, IL 60555 Quick Open Estimate:		Customer: 5 Status: Select Customer

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

			Security
©nCommand [™] Repair Management	Service Estimating Customer Estimating Information		
Home Estimate Dealer Customer	Vehide Links	Print Feedback Preferences	Logoff Help Banner
CANTERA US DLR TEST ACCT(000099000) 4201 WINFELD RD., WARRENVILLE, IL 60555 Quick Open Estimate:		Customer: 듣 🔍 🕂 Status:	
Select Customer			×
	Select Customer		
g 3	Starts with O Contains Show deleted customers		

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

	vice Estimating Customer Estimating Information		
lome Estimate Dealer Customer Vehicle	Links Print Feedba	ack Preferences Logoff	Help Bann
CANTERA US DLR TE ST ACCT(000099000)	Customer: 🚍 Status:	& +	
uick Open Estimate:			
Select Customer			8
	Select Customer		
9 Starts with	Contains Show deleted customers	N4 4 1	2 🖗 🕅
	Contains Show deleted customers	R d 1 Deleted	2 🌶 🕅
Search ® Starts with			2 0
g Search ® Starts with Name GARY L RESMONDO SOD	Company	Deleted	
g Search ® Starts with Name GARY L RESMONDO SOD. GARY L RIVERS	Company GARY L RESMONDO SOD.	Deleted N	•
g Search Starts with Name GARY L RESMONDO SOD GARY LRIVERS GARY O'BRIAN	Company GARY L RESMONDO SOD. GARY L RIVERS	Deleted N N	 9 9 9 9
g Search ® Starts with Name GARY L RESMONDO SOD. GARY L RIVERS GARY O'BRIAN GENE MICHIEL ROEBUCK	Company GARY L RESMONDO SOD. GARY L RUERS GARY O'BRIAN	Deleted N N N	 • •<
g Search Starts with Name GARY L RESMONDO SOD GARY L RIVERS GARY O'BRIAN GENE MICHIEL ROEBUCK GENEVA ROCK PRODUCTS INC GEORGE HARE	Company GARY'L RESMONDO SOD. GARY'L RIVERS GARY'O'BRIAN GENE MICHIEL ROEBUCK	Deleted N N N N	
g Search Starts with Name GARY L RESMONDO SOD. GARY L RIVERS GARY O'BRIAN GENE MICHIEL ROFBUCK GENEVA ROCK PRODUCTS INC GEORGE HARE	Company GARY L RESMONDO SOD. GARY L RIVERS GARY O'BRIAN GENE MICHIEL ROEBUCK GENEVA ROCK PRODUCTS, INC	Deleted N N N N N	
Search Starts with Search Starts with GARY L RESMONDO SOD. GARY L RIVERS GARY O'BRIAN GENE MICHIEL ROEBUCK GENEYA ROCK PRODUCTS INC GEORGE HARE Get 11 done 4	Company GARY L RESMONDO SOD. GARY L RIVERS GARY O'BRIAN GENE MICHIEL ROEBUCK GENEVA ROCK PRODUCTS, INC GEORGE HARE	Deleted N N N N N N N	
g Search ® Starts with Name GARY L RESMONDO SOD GARY L RIVERS GARY O'BRIAN GENE MICHIEL ROEBUCK GENEVA ROCK PRODUCTS INC GEORGE HARE	Company GARY'L RESMONDO SOD. GARY'L RIVERS GARY'O'BRIAN GENE MICHIEL ROEBUCK GENEVA ROCK PRODUCTS, INC DEORGE HARE Get Y' Done	Deleted N N N N N N N N	

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

	rvice Estimating Customer Estimating Information	Security
Home Estimate Dealer Customer Vehicle	Links	Print Feedback Preferences Logoff Help Banner
CANTERA US DLR TEST ACCT(000099000) SI 4201 WINFELD RD., WARRENVILLE, IL 60555		Customer: 🗄 Get 'R' Done 🔍 🗐 🥖 🗕 🖶 👼 Status: 🔔 Dealer Customer
Quick Open Estimate:		
Name: Address:	Customer Estimating Information Get "r" done 329 N Dearborn St. Chicago, IL 808542681	
DM S:		
5 Labor Pricing Source:	VOC shipping (78.50)	Mass-edit items in a grid
Part Pricing Source:		
Customer Fleet Charge (💬):		
Tax exempt		
- Unit	Savo Read	

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

©nCommand [™] Repair Management	Service Custor	Estimating ner Estimating Information		Security
Home Estimate Dealer Customer Ve	hide Links		Print Feedback Preferences	Logoff Help Banner
GANTERA US DLR TEST AGGT(000089000) 4201 WINFELD RD., WARRENVILLE, IL 60555 Guick Open Estimate:			Customer: 🔁 🔍 🕇 Status:	
Select Customer		Customer Estimating Information		
	Name:			6
Ade	dress: DMS:			0
Labor Pricing S				Mass-edit items in a grid
Part Pricing S	0.000772			Mass-edit items in a grid
Customer Fleet Charge				¥
Tax ex				

7. Enter your search criteria and click the Search button

Command Repair Management	Service Es Custome	timating r Estimating Information	Security
Home Estimate Dealer Customer	Vehide Links		Print Feedback Preferences Logoff Help Banner
CANTERA US DLR TEST ACCT(000099000) 4201 WINFELD RD., WARRENVILLE, IL 60555			Customen: 듣 🔍 🕂 Status:
Quick Open Estimate:			
		Search Criteria	
Name:		DMS:	Customer Fleet Charge (💬):
Labor Pricing:		Part Pricing:	Tax exempt:
Show deleted customers:			
	-	7	

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.

©nCommand [™] Repair Management	Cu	ice Estimating stomer Estima		395. 				Security
Home Estimate Dealer Customer CANTERA US DLR TEST ACCT(000099000) 4201 WINFELD RD., WARRENVILLE, IL 60555 Quick Open Estimate:	Vehide Lin	ks			er. 🗮 🔍 💠	ferences L	ogoff He	slp Bariner
 343 records were four 	d							
		Se	earch Criteria					
Name:			DM S:		Customer Fleet	200 - 10 0	Contraction of the local division of the loc	
Labor Pricing: Show deleted customers:		Par	rt Pricing:			Tax exempt	:	
		Customer Fleet	arch Reset		20 8	23456		
Customer	DMS	Charge	Part Pricing	Labor Pricing	Rate	Exempt	Edit	Deleted
			Retail		0.00	N	1	N
A and K Trucking Incorporated							10 mg	N
Contraction of the second s			Retail		0.00		- *	
A BEAUMONT TRANSPORT INC.			Retail		0.00	8	7	N
A BEAUMONT TRANSPORT INC. Abbott Food Services						8	/	
A and K Trucking Incorporated A BEAUMONT TRANSPORT INC. Abbott Food Services ABC Co ACCESS ENERGY COOPERATIVE			Retail		0.00	8	1	N
A BEAUMONT TRANSPORT INC. Abbolt Food Services ABC Co			Retail Retail		0.00		11/1	N N
A BEAUMONT TRANSPORT INC. Abbott Food Services ABC Co ACCESS ENERGY COOPERATIVE			Retail Retail Retail		0.00 0.00 0.00	-14	11/1/	N N N

4.7. UPLOADING A CUSTOMER'S VEHICLE

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

©nCommand [™] Servic Repair Management Horr	e Estimating	Security Control Contr
Home Estimate Dealer Customer Vehicle Links	S	Print Feedback Preferences Logoff Help Banner
CANTERA US DLR TEST ACCT(000099000)	Vehicle: Comer: Vill: Engine:	Customer 1

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

Repair Management Service Estimating Home	Security Control Contr
Home Estimate Dealer Customer Vehicle Links	Print Feedback Preferences Logoff Help Banner
CANTERA US DLR TEST ACCT(000099000) Vehicle: 4201 WINFELD RD., Owner: WARRENVILLE, IL 60555 VIN: Quick Open Estimate: Engine:	Customer: 듣 🔍 🕂 Status:
 2 records were found 	× .
Select Custo	omer
Dealer Customers Service Partner Customers g Scarch Image: Starts with Contains Show deleted customers	10'3

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

	rvice Estimating Home			Se
ome Estimate Dealer Customer Vehicle	Links	Print Feedback Pre	ferences Logoff	Help Ba
CANTERA US DLR TE ST ACCT(000099000) 1201 WINFIELD RD., WARRENVILLE, IL 60555 Duick Open Estimate:	Vehicle: Owner: VIN: Enginc:	Customer: 듣 🔍 🕇 Status:		
 2 records were found 				
	Select Customer			
Dealer Customeral Service Partner Customeral				
9 Search Starts with	Contains Show deleted customers	Сотралу		2 🖗 🕅
g Search ® Starts with Name	Contains Show deleted customers	Company	N 1	2 🕨 🕅
2 Search Starts with Name GARY L RESMONDO SOD.		<u>Company</u>	Deleted	
2 Search ® Starts with Name GARY L. RESMONDO SOD, GARY L.RIVERS	GARY L RESMONDO SOD.	Company	Deleted N	• •
2 Search Starts with Name GARY L RESMONDO SOD, GARY L.RIVERS GARY O'BRIAN	GARY L RESMONDO SOD. GARY L RIVERS	<u>Company</u>	Deleted N N	€ 5
2 Search Starts with Mame GARY L RESMONDO SOD. GARY LRIVERS GARY O'BRIAN GENE MICHIEL ROEBUCK	GARY L RESMONDO SOD. GARY L RIVERS GARY O'BRIAN		Deleted N N N	 Image: Constraint of the second second
Search Starts with Search Starts with GARY L RESMONDO SOD. GARY LRIVERS GARY O'BRIAN GENE MICHIEL ROEBUCK GENEVA ROCK PRODUCTS, INC GEORGE HARE	GARY L RESMONDO SOD GARY L RESMONDO SOD GARY O'BRIAN GENE MICHIEL ROEBUCK		Deleted N N N	(0) (0) (0) (0) (0) (0) (0) (0) (0) (0)
2 Search Starts with Mame GARY L RESMONDO SOD. GARY LRIVERS GARY O'BRIAN GENE MICHIEL ROEBUCK GENEVA ROCK PRODUCTS, INC GEORGE HARE	GARY L RESMONDO SOD. GARY L RIVERS GARY O'BRIAN GENE MICHIEL ROEBUCK GENEVA ROCK FRODUCTS		Deleted N N N N N	
Name GARY L RESMONDO SOD. GARY LRIVERS GARY O'BRIAN GENE MICHIEL ROEBUCK GENEVA ROCK PRODUCTS, INC GEORGE HARE	GARY L RESMONDO SOD BARY L RIVERS GARY O'BRIAN GENE MICHIEL ROEBUCK GENEVA ROCK FRODUCTS GEORGE HARE		Deleted N N N N N N	

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

	mmand [™] Management		vice Estimating ome				R			Q291
	Dealer Info Maintenance Sales Tax Maintenance Labor Rate Maintenance Shop/Misc Fee Maintenance		Links Vehicle: 들 🌵 Owner: VIN: Engine:				t Feedback Preix comer: 🧮 Get 'R' Do Status: 🧟 Dealer Cus	ne 🔍 🖻 🥖		anner
My open estim	Upload Logo Part Maintenance Operation Maintenance Labor Source Maintenance	ldvance	ed Search Vehicle		Unit	Customer	 Status	Assigned	Changed	
9260	Customer Estimating Info Upload Customer Vehicles Fleet Info	2 /	2008 - PROP - PROSTAR PREMUM 6X4 - CUM ISX- 485, 500HP @1800RPM - 8C539592	-0	98	Get 'r' Done		0000291	2010-07-09	ы

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

		Security
Sepair Management	Service Estimating Upload Customer Vehicles	
Home Eslimate Dealer Customer	Vehicle Links	Print Feedback Preferences Logoff Help Banner
CANTERA US DLR TEST ACCT(000099000) 4201 WINFIELD RD., WARRENVILLE, IL 60555 Quick Open Estimate:		Customer: 🔚 Get 🕅 Done 🔍 🛅 🥒 🖛 🔀 Status: 🙎 Dealer Customer
	Upload Vehicles	
Template: Click here to down	nioad a sample template	
File:	5 Browee	

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.

licrosoft Excel - Custon	ner_Vehicle_Upload_T	emplate_New[1]				
Ele Edit Vew Insert	Format <u>T</u> ools <u>D</u> ata	<u>Window</u> <u>H</u> elp	Ado <u>b</u> e PDF		Type a question for help	8 ×
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K19 - 5×	B	C	D	E	F	77
VIN/Chassis	Unit No	Make	Model	Year	Description	
6						
	Ele Edit Vew Insert	Ele Edit Vew Insert Format Tools Data C I I I I I I I I I I I I I I I I I I I	Ele Edit Vew Insert Formet Tools Data Window Help	K19 A B C D VIN/Chassis Unit No Make Model	Ele Edit Vew Insert Format Tools Data Window Help Adobe PDF C R A B C D E VIN/Chassis Unit No Make Model Year	Edit Vew Insert Formet Tools Data Window Help Adobe PDF Type a question for help Image: State of the state o

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

Sepair Management	Service Estimating Upload Customer Vehicles	Security
Home Estimate Dealer Customer	Vehicle Links	Print Feedback Preferences Logoff Help Banner
CANTERA US DLR TEST ACCT(000099000) 4201 WINFELD RD., WARRENVILLE, IL 60555 Quick Open Estimate:		Customer: 듣 Get "R' Done 🔍 📰 🥒 🕳 🕞 Status: 🧟 Dealer Customer
	Upload Vehicles	
Template: Click here to down		
7 Upload	Settings/HP_Administrator/My Documents/Busine CHRWSELLE an 2 MB in size and must be valid Excel spreadsheets (ALS or ALS	X).

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

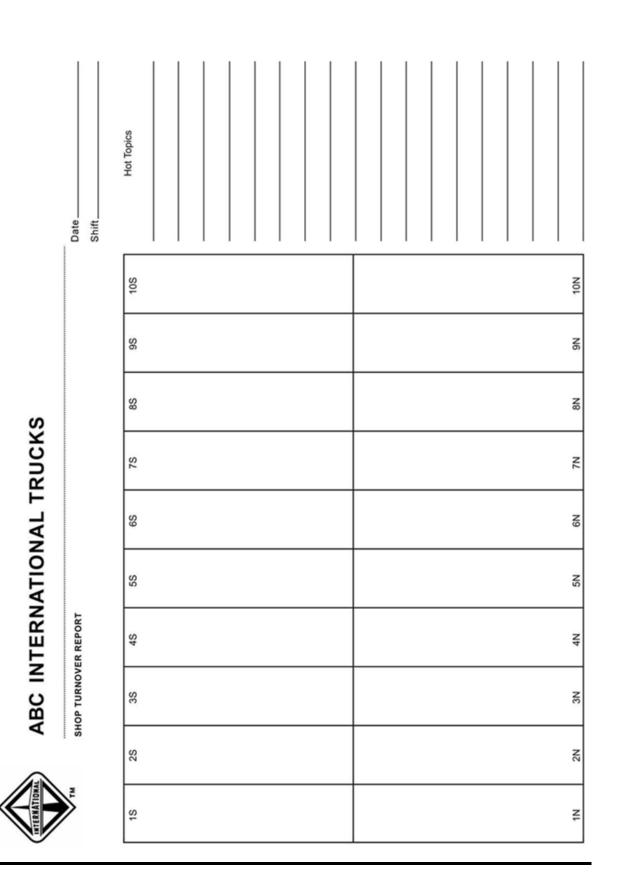
1.	Was a Health Report taken and uploaded to the service portal when the vehi arrived?									
	arrive	u.	Yes	No						
2.	Review	w the vehicle's History.								
	a.	Are there any Open "Managed Repairs"?	Yes	No						
	b.	If yes, list Open Managed Repairs here								
		Review History in both the Dealers system and "Warranty Hi Was this vehicle in for <u>any</u> repairs in the past 90 days?	Yes No Yes No Ity History" Yes No same concern? Yes No Yes No d use the Fault Cod	No						
		If yes, review the claims. Was the vehicle in for the same								
		Notes:								
	e.	Review the "Case History" for this vehicle. Are there any relatable Case Files for this vehicle?	Yes	No						
ar 2. Ro 3. Ro	Ranke a.	Notes: n to the Health Report taken when this vehicle arrived and use er to Rank the Engine Fault Codes. What is the first Ranked Fault Code? List any other Fault Codes in the order you ranked them	the Fat	ılt Code						
		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 diagno	se?		
7. List any other codes, in ranked order, that were in the He	alth Repor	t.	
-			
-			
-			
Notes:			
8. Did you follow the Diagnostic Steps and/or the Elemental vehicle? Yes No	Steps to re	pair thi	is
9. Did you locate any issues with the published information vehicle?	to diagnose	or rep	air this
venicle?		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 Rej	port"? Yes	No
11. If No –Do so now.			

5.3. SAMPLE FORM: SHOP TURNOVER REPORT



5.4. SAMPLE FORM: CUSTOMER LOG AND READY LIST

			CUSTO	IER LOG	AND R	EADY	LIS	T							
TAG #	RO #	CUST. NAME	PHONE NUMBER & CONTACT NAME	COD/CHG. WARR.	UNIT #	DATE	IN	TECH Assigned	DATE		DATE CUS CALLED		PICKED UP BY:	DATE:	
			1			1	1		1	1	1	1		1	1
			1			1	1		1	1	1	1		1	1
			1			1	1		1	1	1	1		1	1
			1			1	1		1	1	1	1		1	1
			1			1	1		1	1	1	1		1	1
		•	1			1	1		1	1	1	1		1	1
			1			1	1		1	1	1	1		1	1
			1			1	1		1	1	1	1		1	1
			1			1	1		1	1	1	1		1	1
			1			1	1		1	1	1	1		1	1
			1			1	1		1	1	1	1		1	1
			1			1	1		1	1	1	1		1	1
			1			1	1		1	1	1	1		1	1
			1			1	1		1	1	1	1		1	1
			1			1	1		1	1	1	1		1	1
			1			1	1		1	1	1	1		1	1
			1			1	1		1	1	1	1		1	1
			1			1	1		1	1	1	1		1	1
			1			1	1		1	1	1	1		1	1
			1			1	1		1	1	1	1		1	1
			1			1	1		1	1	1	1		1	1
			1			1	1		1	1	1	1		1	1
			1			1	1		1	1	1	1		1	1

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																	
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