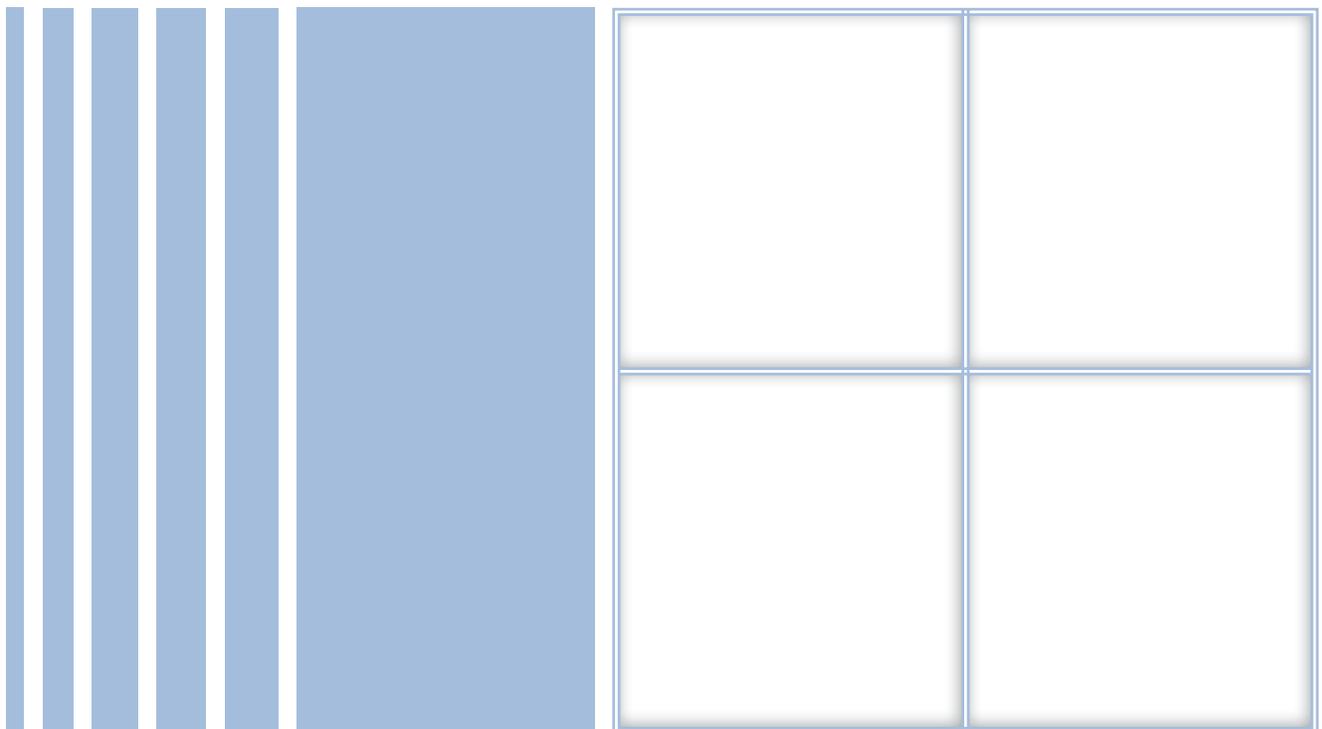


# Service Portal

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TMT - 101206  
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First Edition, March 2012

## Managing Your Business for Service Managers Study Guide





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# INTRODUCTION

Welcome to the Navistar Service Portal training program – Managing Your Business for Service Managers. In this program, you'll learn about the tools and resources you may utilize to manage your business on a day-to-day basis.

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

## LESSON 1: INTRODUCTION

The Service Portal is your online resource for the most up-to-date service and technical information. It is a comprehensive collection of materials designed to support you in doing your job.

### Service Portal Resources

Whether your focus is service, technical information, dealership administration, or warranty information, the Service Portal is a vital resource as you do your job.

- Need the Hard Start/No Start Diagnostic form for a MaxxForce 11 engine? In the Publications menu, you'll find the Master Service Information tool, which allows you to search all available publications.
- Need help troubleshooting an issue with an air conditioning system? In the Diagnostic menu, you'll find a link to the HVAC Service Resource Center.
- Need information about a particular vehicle? In the Write Up menu, you'll find the Vehicle Information feature.
- Looking for the portal to access the Learning Management System? It's in the Dealer menu.
- Looking for metrics on your dealership's performance on warrantied repairs? You'll find this information in the Service Performance Statement, which is in the Warranty menu.
- Want to change your password? The link to this feature is in the Support menu.

### Learning Objectives

In this program, you'll learn to:

- Navigate the Service Portal interface, and
- Access resources used to monitor the repair process.

The Service Portal Quick Start Guide for Service Managers is available to assist you while completing this program and as a resource on the job.

There is also a Glossary, which provides a brief description of each menu feature.



## LESSON 2: NAVIGATING THE SERVICE PORTAL

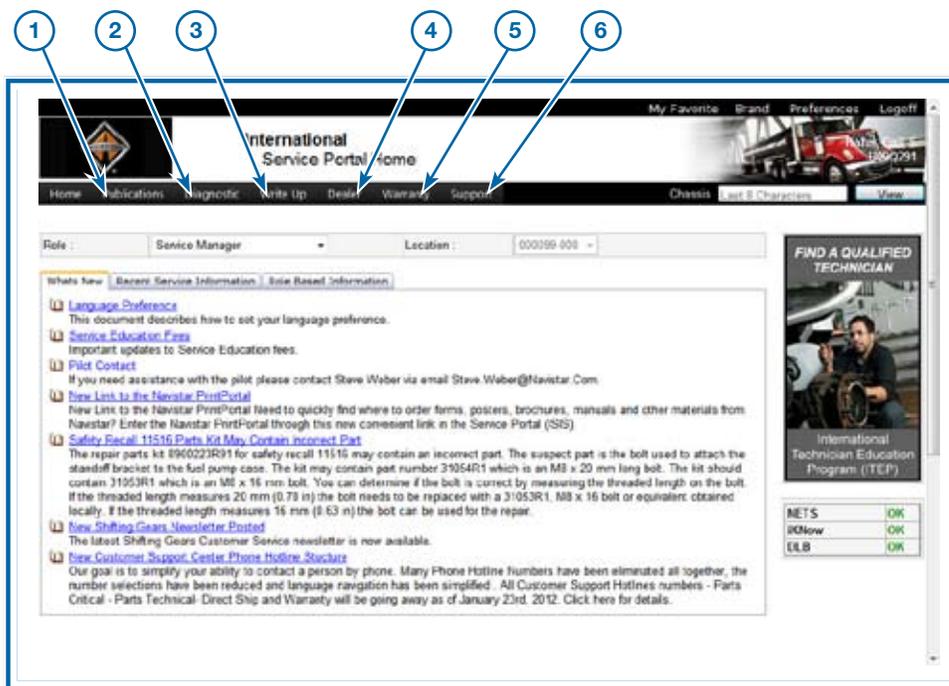
### Service Portal Home Screen

In the top menu bar at the upper right, you'll find options that take you to operational functions of the portal. Here you can set up Favorites, just as you can when using a browser; select the brand you want to work in, set up language and other personal preferences and log off.

In the menu bar below the International® logo, you'll find options that allow you to navigate to the available resources in the Service Portal.

**The main menu options are:**

1. **Publications**
2. **Diagnostic**
3. **Write Up**
4. **Dealer**
5. **Warranty**
6. **Support**



## LESSON 2: NAVIGATING THE SERVICE PORTAL

### Operational Functions

The menu options at the upper right of the Service Portal Home screen allow you to set up how you want the portal to operate.



- My Favorite allows you to bookmark the features and tools you use most often. You can easily add, edit and delete entries in your My Favorite list.
- Brand allows you to move between Navistar brands: Estar, International, NC2 Caterpillar, NC2 International, ICBus, and NeoBus are examples.
- The Preferences option opens a dialog box where you can select parameters that affect how the features of the Service Portal are displayed. You'll learn more about this in the next topic.
- Logoff allows you to log out of the portal.

## LESSON 2: NAVIGATING THE SERVICE PORTAL

### Preferences

Let's take a closer look at the preferences you can set up using the Preferences dialog box.

The screenshot shows the 'User Preferences' dialog box. It features a header with the International logo and navigation links. The main area is titled 'User Preferences' and contains a 'User Preferences For' section with three dropdown menus and a 'View' button. Below this is a table with columns 'Item', 'Context', and 'Selection'. The table has three rows: 'Language' with 'All' context and 'ENGLISH' selection; 'Records per page' with 'All' context and '50' selection; and 'Brand' with '654327 000' context and a dropdown arrow. At the bottom, there's an 'Apply Settings To' section with three dropdown menus for 'Service', 'World Wide Service Portal', and 'Or' followed by a checkbox for 'This Session Only'. There are 'Save' and 'Refresh' buttons at the bottom right. Numbered callouts 1 through 6 point to various elements: 1 points to the 'Service' dropdown in the 'User Preferences For' section; 2 points to the 'Language' row in the table; 3 points to the 'Records per page' row; 4 points to the 'Brand' row; 5 points to the 'Apply Settings To' section; and 6 points to the 'Save' button.

1. The User Preferences For fields allow you to select the Business, Group, Application, and Session you want to view and modify.
2. You can select the Language used for the display. Simply click the drop-down arrow after the current language and click on one of the supported languages.
3. The Records Per Page field will be used in the future.
4. If your dealership is set up to work with more than one Brand, it will default to International. You can change your default brand by clicking on the drop-down arrow and selecting it from the list.
5. Finally, you can Apply Settings To a particular Business, Group and Application by selecting the values you want from these drop-down lists. Or you can apply them to This Session Only by clicking the checkbox.
6. Click the Save button to apply your new settings. Then close the dialog box to return to the Service Portal.

## LESSON 2: NAVIGATING THE SERVICE PORTAL

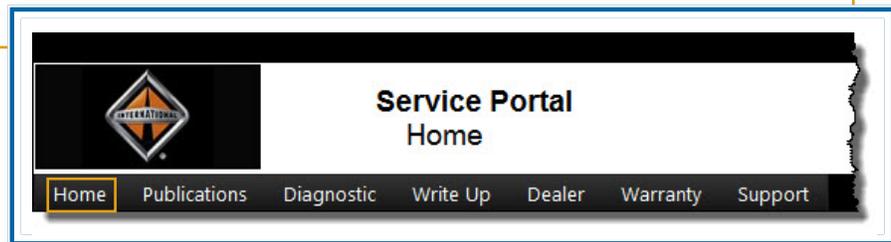
### Navigational Menu Options

You'll use the navigational menu options: Home, Publications, Diagnostic, Write Up, Dealer, Warranty, and Support, to navigate to the resources available in the Service Portal.

Now let's take a look at the types of resources you'll find in each menu.

#### Home

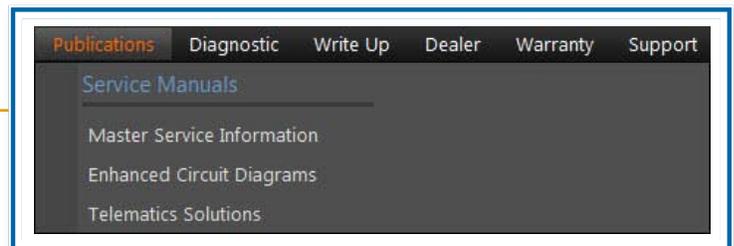
Home returns you to the Service Portal Home screen from whatever feature or tool you might be using.



#### Publications

The Publications menu provides access to service documents that may be used by technicians, service advisors, warranty administrators, and service managers.

- The Master Service Information tool allows you to conduct searches through all Service documents in the portal.
- The Enhanced Circuit Diagram feature provides the ability to search for and view specific wiring diagrams.
- The Telematics Solutions link includes various technical publications, installation guides and other support for Qualcomm's Mobile Computing platform.



## LESSON 2: NAVIGATING THE SERVICE PORTAL

### Diagnostic

The Diagnostic menu provides access to tools that are most frequently used during the diagnosis process.

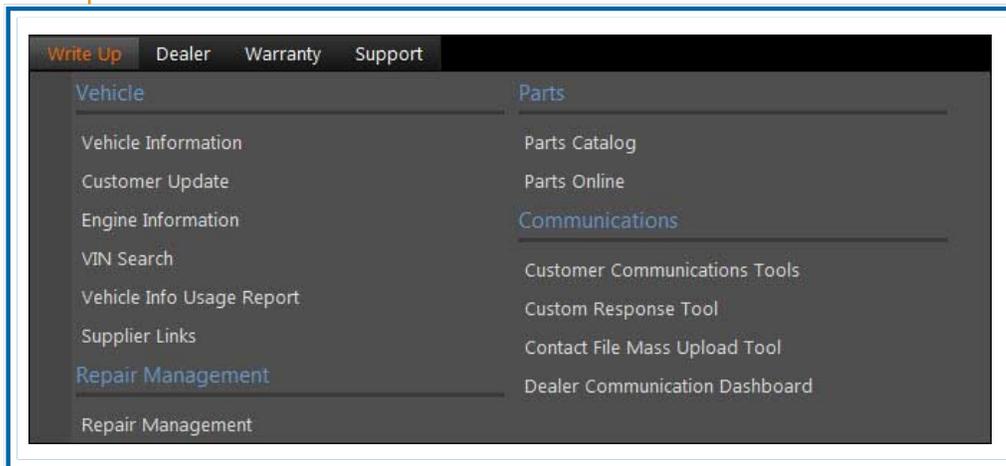
- The iKNow Home link provides access to the knowledgebase of articles about vehicle repairs. iKNow also provides a platform for communication with various support groups, such as Technical Services or Technical Parts, should their assistance be required while troubleshooting a repair.
- The Wabco FPB Programming link is used to program Wabco Full Power Brakes.
- The Service Resource Center provides a variety of information about the various MaxxForce engines, HVAC, remote throttles, service tools, and after treatment.



## LESSON 2: NAVIGATING THE SERVICE PORTAL

### Write Up

The Write Up menu provides access to resources that are most commonly used during the write-up process.

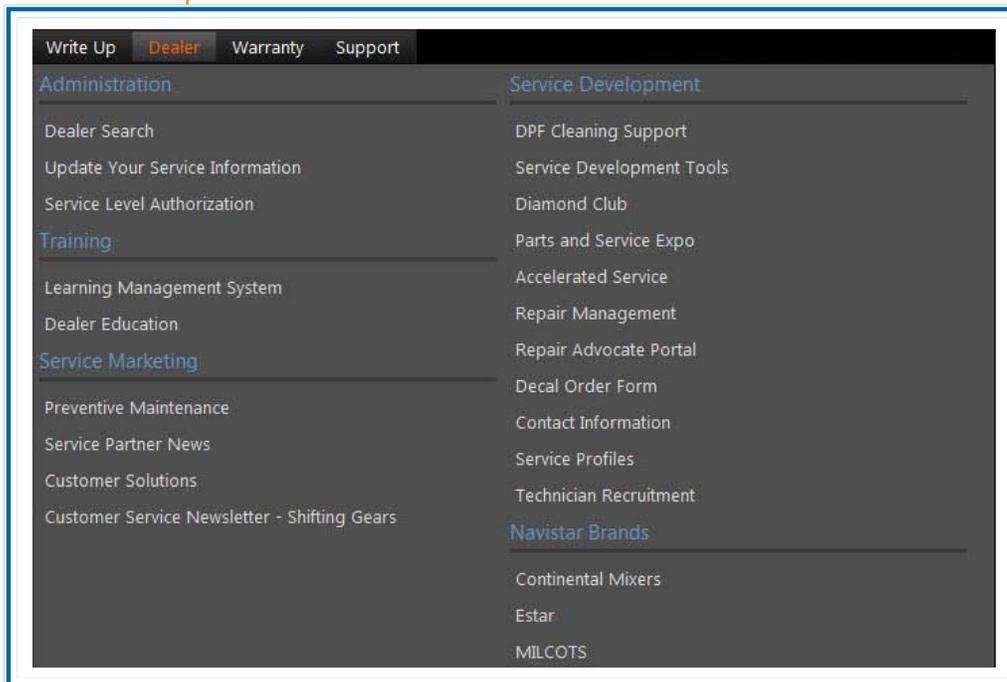


- Vehicle-related resources include specific information about a particular vehicle, the ability to update customer information and specific information about an engine. Other resources provide the ability to search for VINs, look at the Vehicle Info Usage Report and access supplier links.
- The Repair Management system is used to generate service estimates.
- Parts-related resources include the Parts Catalog and Parts Online.
- Communications with customers is supported by the Customer Communications Tools, Custom Response Tool, Contact File Mass Upload Tool, and Dealer Communication Dashboard.

## LESSON 2: NAVIGATING THE SERVICE PORTAL

### Dealer

The Dealer menu provides access to resources that a service manager might use to administer the dealership, market services and develop the business.



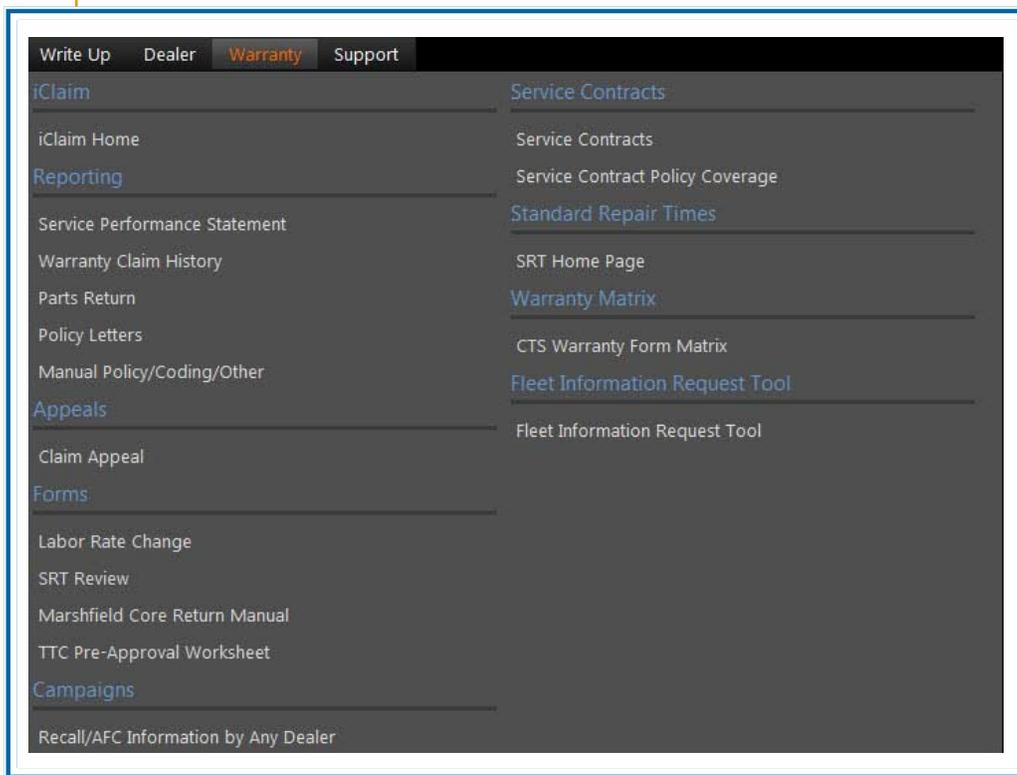
- Administration tools include the ability to search for dealerships, update service information about the dealership and Service Level Authorization.
- Training features include access to the Learning Management System and the Dealer Education site, which provides information on available training courses.
- Service Marketing tools help dealers promote and enroll customers in Parts and Service solutions offered under Navistar brands. They include the Preventive Maintenance program, customer newsletters and a variety of other resources designed to meet customers' needs.
- Service Development tools help dealers better manage their service operations. They range from support for DPF Cleaning to Diamond Club to ordering decals. There are resources that explain the Accelerated Service, Repair Management and Repair Advocate programs.
- The Navistar Brands section provides access to the websites of other Navistar brands, if you are authorized to use them.

## LESSON 2: NAVIGATING THE SERVICE PORTAL

### Warranty

The Warranty menu provides access to a number of resources that the warranty administration group would most commonly use.

- The iClaim system is used to submit warranty claims to Navistar.
- There are a number of reports dealing with performance on warrantied repairs.



From this menu, you can also access:

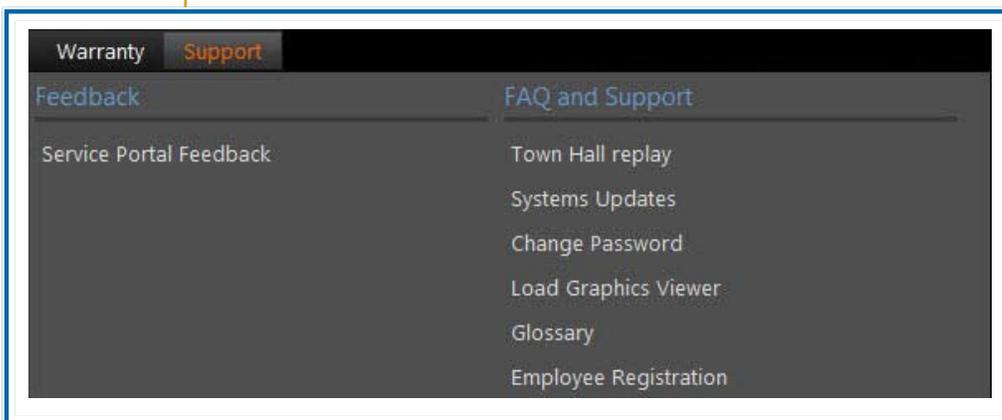
- Claim Appeal,
- forms to request review of parameters of the warranty process,
- information about campaigns,
- information about Service Contracts,
- Standard Repair Times,
- the Warranty Matrix, and
- the Fleet Information Request Tool.

## LESSON 2: NAVIGATING THE SERVICE PORTAL

### Support

In the Support menu, you'll find:

- Service Portal Feedback and
- A number of Support tools, including system updates, changing your password and a glossary, among others.



### Chassis Search

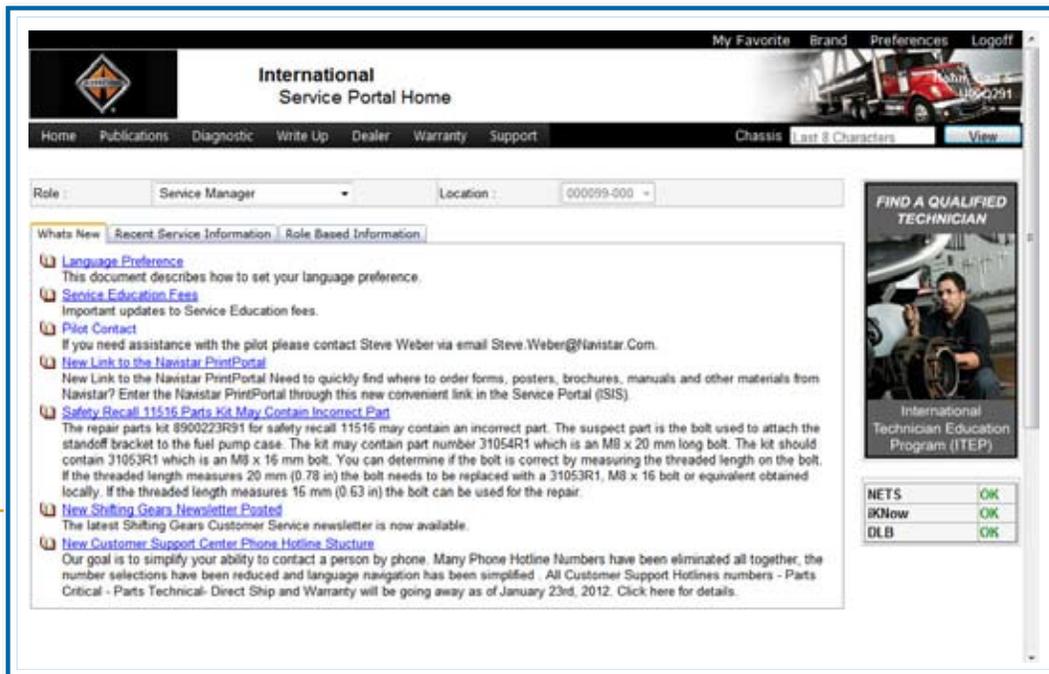
The Chassis Search feature allows you to use the eight-digit chassis number for a vehicle to navigate to the Vehicle Information screen for that vehicle. Just type in the eight digits and click the View button.



## LESSON 2: NAVIGATING THE SERVICE PORTAL

### ● Navigating through the Menus

Now that you've been introduced to the features that are included in each menu, let's take a look at how navigating through them really works. In the following demonstration, you'll learn how to open a menu, select an option and then return to the Home screen.



We'll begin at the Service Portal Home screen.

Here are the main menu options: Home, Publications, Diagnostic, Write Up, Dealer, Warranty, and Support. Let's say that we want to learn more about the latest Navistar MaxxForce engine.

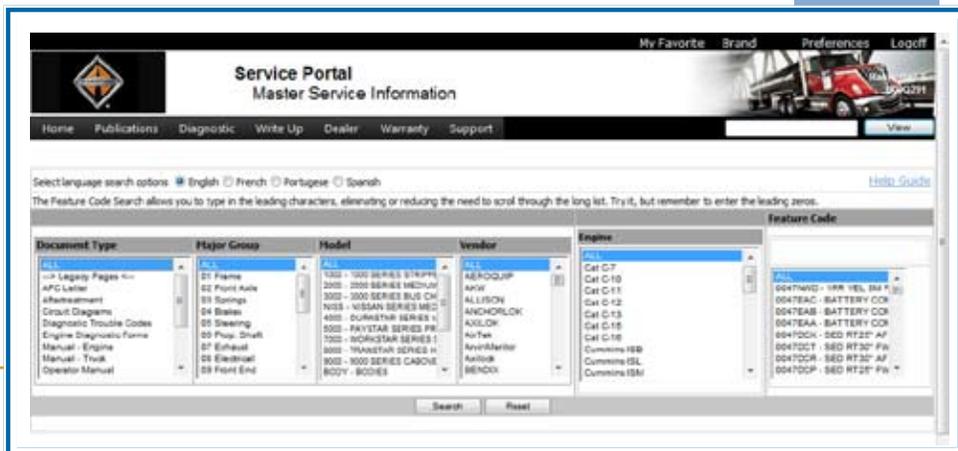
There are two places that we might find engine-related information: the Publications menu or the Diagnostic menu.

## LESSON 2: NAVIGATING THE SERVICE PORTAL

Let's begin with the Publications menu. We'll hover over Publications to open the menu. Then click master Service Information.



The Master Service Information feature allows users to search through all the available Service publications based on document type, major group, model, vendor, engine, feature code, or any combination of these characteristics. It is your one stop shop for finding service-related resources in the Service Portal.



When we open the Master Service Information Search Tool, all fields default to "All." Let's limit our search to the MaxxForce 13 engine by using the Engine field. Engine types are arranged alphabetically. We'll need to scroll down to get to the MaxxForce 13. Now we'll click on MaxxForce 13 to select it. And click on the Search button.

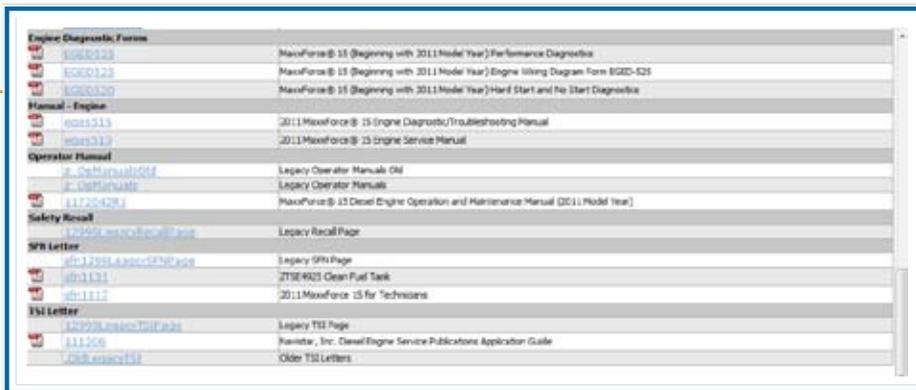
## LESSON 2: NAVIGATING THE SERVICE PORTAL

The search result is a list of all relevant publications, including AFCs and other documents related to the MaxxForce 13 engine. We'll scroll down to see more.



Here you see Engine Diagnostics Forms, Engine and Operator Manuals and other documents.

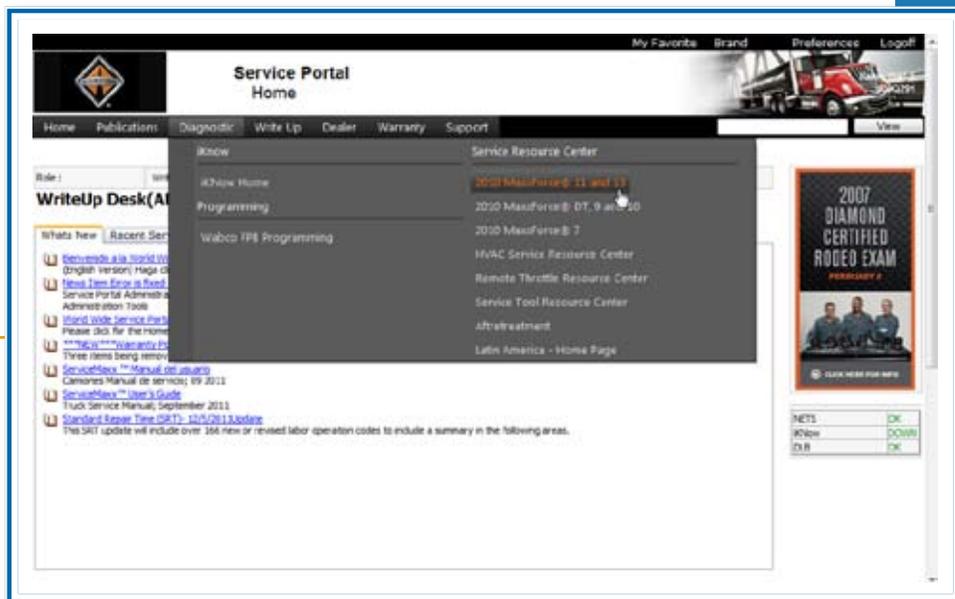
- To open a document in HTML format, simply click the File name.
- Documents that are available as PDFs are preceded by the PDF icon. Just click on the icon to open the document in this format.



To return to the Service Portal Home screen, scroll back up to the top of the screen. Now we'll click the Home link in the menu bar.

## LESSON 2: NAVIGATING THE SERVICE PORTAL

Now let's look for MaxxForce 13 information in the Diagnostic menu. We'll begin by hovering over Diagnostic in the menu bar. Next we'll click on the Service Resource Center for the MaxxForce 11 and 13.

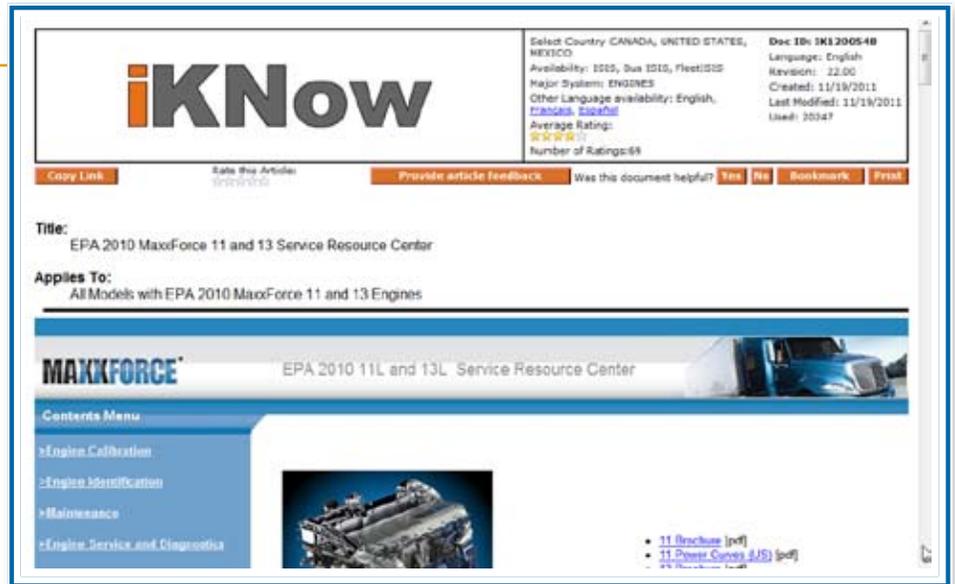


## LESSON 2: NAVIGATING THE SERVICE PORTAL

Each Service Resource Center is an article from the iKNow knowledgebase.

It opens in a separate window. This particular Service Resource Center provides a Content Menu to help find specific information in the document more easily. We'll scroll down to see the entire menu.

In this Contents Menu, there are entries for Engine Calibration, Engine Identification, Maintenance, Engine Service and Diagnostics, Chassis Service, and other topics.



Just click on the topic that you're interested in to navigate to that topic. Let's take a closer look at Engine Calibration.

## LESSON 2: NAVIGATING THE SERVICE PORTAL

The Engine Calibration section consists of links to a series of related articles. Let's scroll down to the Maintenance section.

Calibration Release Date	Release Type	Description	Calibration Version	Release Recommendation and Programming Information
06/20/11	Production and Service	2009 S, 2010 T6 and EPA 2010 MaxxFace 13 Engines Models: ProStar, Tractor, and WorkStar CHECK CALIBRATION SCORECARD <i>Note: This document is now a running list of all Service Calibration Releases for the 2010 MaxxFace 13 Engine.</i>	D.B.1	0/2/2008
06/20/11	Production and Service	2009 S, 2010 T6 and EPA 2010 MaxxFace 11 Engines Models: ProStar, Tractor, and WorkStar CHECK CALIBRATION SCORECARD <i>Note: This document is now a running list of all Service Calibration Releases for the 2010 MaxxFace 11 Engine.</i>	D.B.1	0/2/2007

Release Code Link to Parts Catalog	Description	EPA	Beginning Date
00123A5	MaxxFace 11 EPA 10, 130 HP @ 1700 RPM, 1250 B-ft Torque @ 1000 RPM, 1100 RPM Governed Speed	106	4/10/10
00123A5	MaxxFace 11 EPA 10, 130 HP @ 1700 RPM, 1250 B-ft Torque @ 1000 RPM, 2100 RPM Governed Speed	106	4/10/10
00123B1	MaxxFace 11 EPA 10, 130 HP @ 1700 RPM, 1250 B-ft Torque @ 1000 RPM, 2100 RPM Governed Speed	106	4/10/10
00123A4	MaxxFace 11 EPA 10, 170 HP @ 1700 RPM, 1300 B-ft Torque @ 1000 RPM, 1900 RPM Governed Speed	106	4/10/10
00123A5	MaxxFace 11 EPA 10, 170 HP @ 1700 RPM, 1350 B-ft Torque @ 1000 RPM, 2100 RPM Governed Speed	106	4/10/10
00123A2	MaxxFace 11 EPA 10, 190 HP @ 1700 RPM, 1450 B-ft Torque @ 1000 RPM, 1900 RPM Governed Speed	106	4/10/10
00123A2	MaxxFace 11 EPA 10, 190 HP @ 1700 RPM, 1450 B-ft Torque @ 1000 RPM, 2100 RPM Governed Speed	106	4/10/10
00123A5	MaxxFace 13 EPA 07, 430 HP @ 1700 RPM, 1650 B-ft Torque @ 1000 RPM, 1900 RPM Governed Speed	125	4/10/08

This section also includes several tables that document service intervals for various components of the vehicle. To exit this document, we'll close the window.

Maintenance Code	Description	Date
02000001	2010 Model Year MaxFacer® 11 and 13 Maintenance Code	7/19/2011
02000002	Using Shell Rotella® Extended Life Coolant in 2010 MaxFacer 11, and 13, Engines	7/19/2011
02000003	Service Information New Shell Rotella® Ultra Extended Life Coolant (E.L.C.) used in MaxFacer 11 and 13 engines	7/19/2011
02000004	Phosphate Conditioner Required When Replacing Radiators	7/19/2011
02000005	Shell Rotella® Ultra 25W-50	7/19/2011

System/Fuel Economy	LQHD = 6.5 MPG or Higher (MORE THAN 4 km/L)	MODERATE = 5.5 mpg-6.0 mpg (3-2 km/L)	SEVERE = LESS THAN 5.0 mpg (LESS THAN 2 km/L)
Change Engine Oil and Filter Part # 2000412C11	40,000 mi/64,400 km**	30,000 mi/48,000 km** (Based on a full economy of 6.8 mpg)	18,000 mi/29,000 km**
Change Fuel Filter Part # 300417C30	30,000 mi/48,000 km	20,000 mi/32,000 km	10,000 mi/16,000 km
Clean or Change Fuel Strainer	30,000 mi/48,000 km	20,000 mi/32,000 km	10,000 mi/16,000 km
Change Filter Filter	30,000 mi/48,000 km	20,000 mi/32,000 km	10,000 mi/16,000 km
Adjust Engine Valve Lash	240,000 mi/384,000 km	240,000 mi/384,000 km	240,000 mi/384,000 km
Clean Diesel Particulate Filter (DPF)†	300,000 mi/480,000 km	320,000 mi/512,000 km	300,000 mi/480,000 km
Regain Engine Coolant	300,000 mi/480,000 km	300,000 mi/480,000 km	300,000 mi/480,000 km

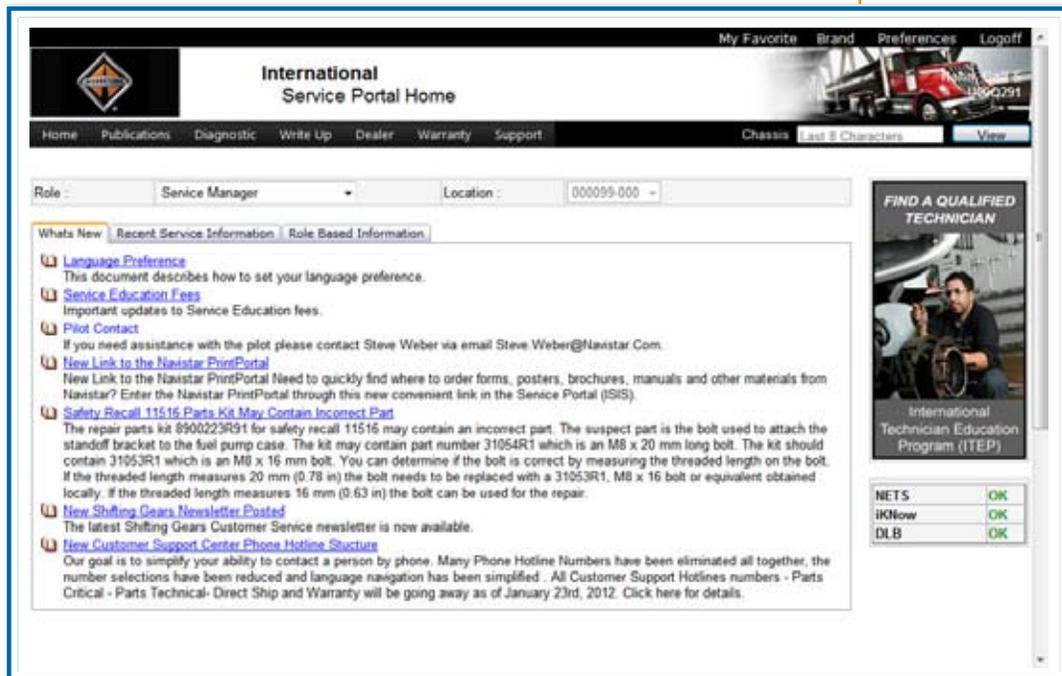


When we close an iKnow document, we'll always see this dialog box requesting feedback on the usefulness of the article. Click Yes or No to indicate whether or not the article helped resolve your issue.

## LESSON 2: NAVIGATING THE SERVICE PORTAL

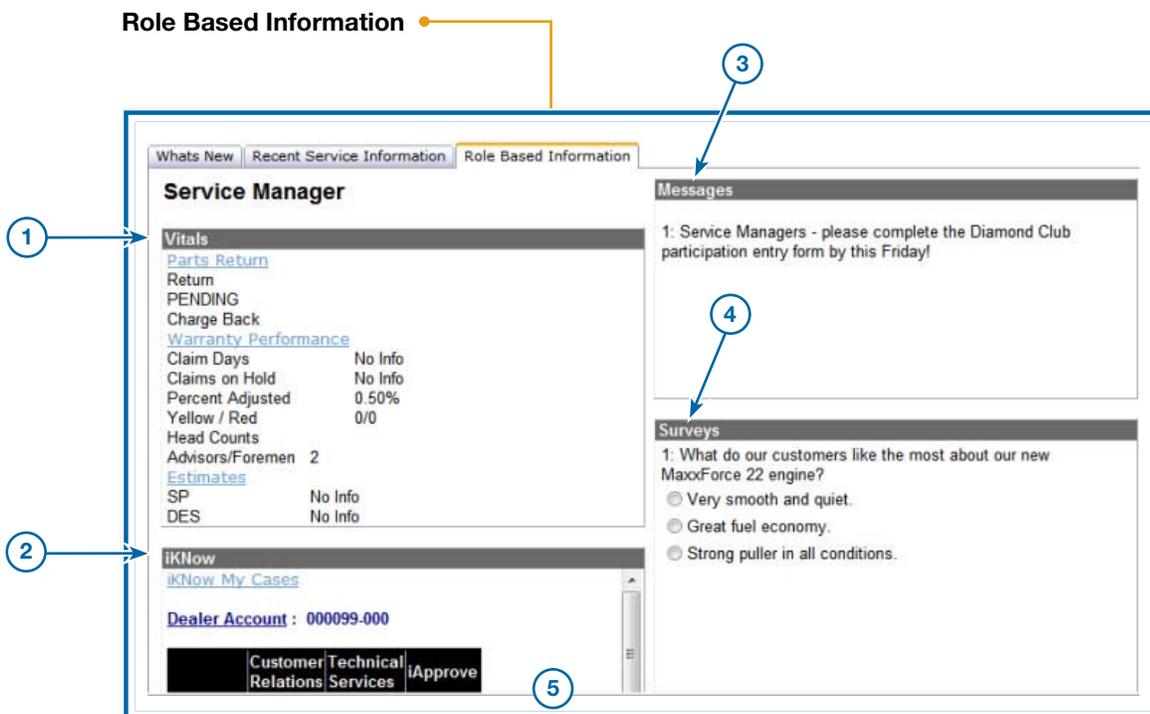
### Home Screen Resources

The Service Portal Home screen has been designed to provide access to the information that you need most frequently.



- The Role feature allows you to customize the Service Portal Home page based on your role in your dealership. The default role is based on the role you are assigned in the Employee Registration system. If you have not been assigned a role, Role will default to “All Roles.” You can select any role to view what personnel in other roles see. If you need a role assigned to your User ID, contact the Employee Registration Administrator at your dealership.
- Location defaults to the dealer location that you are assigned in the Employee Registration system. If you are set up to work in more than one dealer location, you can select the correct location from the drop-down list.
- The What’s New tab displays items that may have articles attached.
- The Recent Service Information tab displays recently released publications. To view a document as an HTML document, click the article title. To view it as a PDF, click the PDF icon.
- The Role Based Information tab displays metrics and information based on the role associated with your user ID. If you have not been set up in the Employee Registration system, you may not see this tab.

## LESSON 2: NAVIGATING THE SERVICE PORTAL



1. **Vitals**
2. **iKNow**
3. **Messages**
4. **Survey**
5. **Education**

The Role Based Information tab is divided into five sections.

- The Vitals section provides performance information for your dealership. The information displayed is dependent on your role. For example, for a Service Manager, it displays key metrics about the various types of open cases, warranty performance and estimates.
- The iKNow section provides more detailed information about the numbers and status of Customer Relations, Tech Services and iApprove cases.
- The Messages section contains messages that are related to your role as assigned in the Employee Registration system.
- The Survey section may contain surveys that are related to your role as assigned in the Employee Registration system.
- The Education section appears below the iKNow section and may display messages related to new training offerings and other training-related issues.



## LESSON 3: MONITORING THE REPAIR PROCESS

The Service Portal provides access to several resources that are designed to help you manage different aspects of the repair process. You can:

- Monitor current repairs using the Dealer Monitor Report and other resources,
- Review performance on warrantied repairs using a number of warranty-related reports and
- Manage warranty campaigns with the Recall/AFC MIN Summary by Dealer report.

### Monitoring Current Repairs

Let's take a closer look at some of the features you might use as you manage repairs in your dealership.

#### Requests for Support

Each request for assistance to a Navistar support team generates a case file. You can view your complete list of case files using the Dealer Monitor Report. This report includes all support requests to Tech Services, parts inquiries, critical parts orders, and Repair Advocate cases.

#### Status of Estimates

The status of estimates can be reviewed using the Repair Management System. Options allow you to view open or all estimates for a variety of time periods and locations or to search for specific estimates. The Operations Quoted Not Sold Report provides information on operations that were declined by customers.

#### Resource Usage

Two reports provide information on how often technicians and service advisors use key resources that are available to them: The Vehicle information Usage Report and the Estimate Usage Report.

## LESSON 3: MONITORING THE REPAIR PROCESS

### Dealer Monitor Report

The Dealer Monitor Report displays the current status of a dealership's cases. It is designed to be prominently displayed so that everyone at your dealership can see it.

The screenshot shows the iKNow Dealer Monitor interface. It features a 'Monitor Preferences' section with checkboxes for various case types and actions. A 'Location' dropdown menu is set to 'INTERNATIONAL TRUCKS (00001-000)'. A 'Refresh Now' button is present. Below the preferences is a table of cases with columns for Case #, Dealer ID, Name, Status ID, Vehicle Status, Case Type, Days Open, RO #, Customer, Chassis #, Group Name, and Fleet Name. The table contains six rows of data, with the first three rows highlighted in salmon color (Action Required) and the last three rows highlighted in yellow (Request for Closure).

Case #	Dealer ID	Name	Status ID	Vehicle Status	Case Type	Days Open	RO #	Customer	Chassis #	Group Name	Fleet Name
1327063	795245-000	Roberto Anaya	ACTION REQ	Vehicle Down - At Dealer	TECHNICAL SERVICE	21	36064	rapid testers	34595116	Engine V8	
1329371	795245-000	Roger Huett	ACTION RECV		TECHNICAL SERVICE	18		SOUTHEASTERN FREIGHT LINES INC	C3462721	Engine Big Bore Support	Southeastern Freight Lines
1352036	795245-000	Roger Huett	ACTION REQ	Vehicle Down - At Dealer	TECHNICAL SERVICE	1	36690	tdot	83364239	Engine Big Bore Support	
1352642	795245-000	Dusty Cobb	REQ_CLOSURE		PARTSINQUIRY	1		GELCO CORP	88631617	Parts Inquiries	
1342690	795245-000	Cory Smith	REQ_CLOSURE		PARTSINQUIRY	9			39572348	Parts Inquiries	
1347573	795245-000	Cory Smith	REQ_CLOSURE		PARTSINQUIRY	4		SANDERA TRUCKING CO.	63241929	Parts Inquiries	

1. All available Case Types are listed in the Monitor Preferences section. In this particular display, all case types are checked. You could, however, limit the display to some subset of these types.
2. If there is more than one location for the dealership, you can select the one you want to view from the Location drop-down list.
3. This display defaults to refreshing automatically every five minutes. You can select a different value from the drop-down list or refresh immediately by clicking the Refresh Now button.
4. The colors assigned to the cases in this report have specific meanings. If action is required, the case is salmon-colored. If a note from Tech Services is attached, it is tan. Cases that have a new iKNow document attached are green. And requests for closure are yellow.
5. Cases are displayed in table format based on the case types selected and the dealership location selected. You'll learn more about the fields that are displayed for each case in the next topic.

## LESSON 3: MONITORING THE REPAIR PROCESS

### Dealer Monitor Report Fields

Case #	Dealer ID	Name	Status ID	Vehicle Status	Case Type	Days Open	RO #	Customer	Chassis #	Group Name	Fleet Name
1327063	795245-000	Roberto Anaya	ACTION REQ	Vehicle Down - At Dealer	TECHNICAL SERVICE	21	36064	rapid testers	JH595116	Engine V8	
1329371	795245-000	Roger Huett	ACTION RECVD		TECHNICAL SERVICE	18		SOUTHEASTERN FREIGHT LINES INC	C3462721	Engine Big Bore Support	Southeastern Freight Lines
1332038	795245-000	Roger Huett	ACTION REQ	Vehicle Down - At Dealer	TECHNICAL SERVICE	1	36498	Isot	83364289	Engine Big Bore Support	
1332642	795245-000	Dusky Cobb	REQ_CLOSURE		PARTSINQUIRY	1		GELCO CORP	88651617	Parts Inquiries	
1342690	795245-000	Cory Smith	REQ_CLOSURE		PARTSINQUIRY	9			JH372368	Parts Inquiries	
1347573	795245-000	Cory Smith	REQ_CLOSURE		PARTSINQUIRY	4		SANDERA TRUCKING CO.	63241929	Parts Inquiries	

A number of different fields are displayed for each case in the Dealer Monitor Report. The report can be sorted on any of these fields simply by clicking on the field name in the column heading.

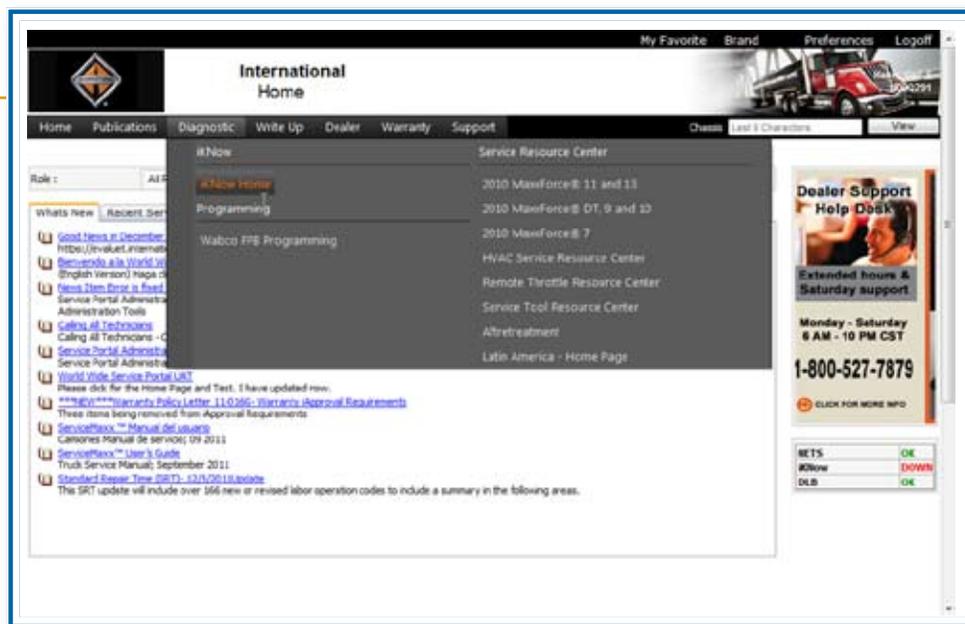
1. The Case Number is the number assigned when the case was created.
2. The Dealer ID displays the dealer account number.
3. The Name field displays the name of the person who initiated the case.
4. Status ID displays the iKNow system status currently assigned to the case. As you can see, this frequently corresponds to the color-coding assigned to the case.
5. The Vehicle Status column displays the status assigned to the vehicle, if any.
6. The Case Type field displays the part type of case for each listing.
7. Days Open displays the number of days the case has been open.
8. The Repair Order Number field displays the number, if any, assigned to the associated repair order in the dealership's management system.
9. The Customer field displays the name of the customer that owns the vehicle.
10. The Chassis Number displays the chassis number of the vehicle.
11. The Group Name column displays the name of the support group that is currently assigned to the case.
12. The Fleet Name field displays the name of the associated fleet, if any.

## LESSON 3: MONITORING THE REPAIR PROCESS

### Generating the Dealer Monitor Report

Generating the Dealer Monitor Report is a simple task.

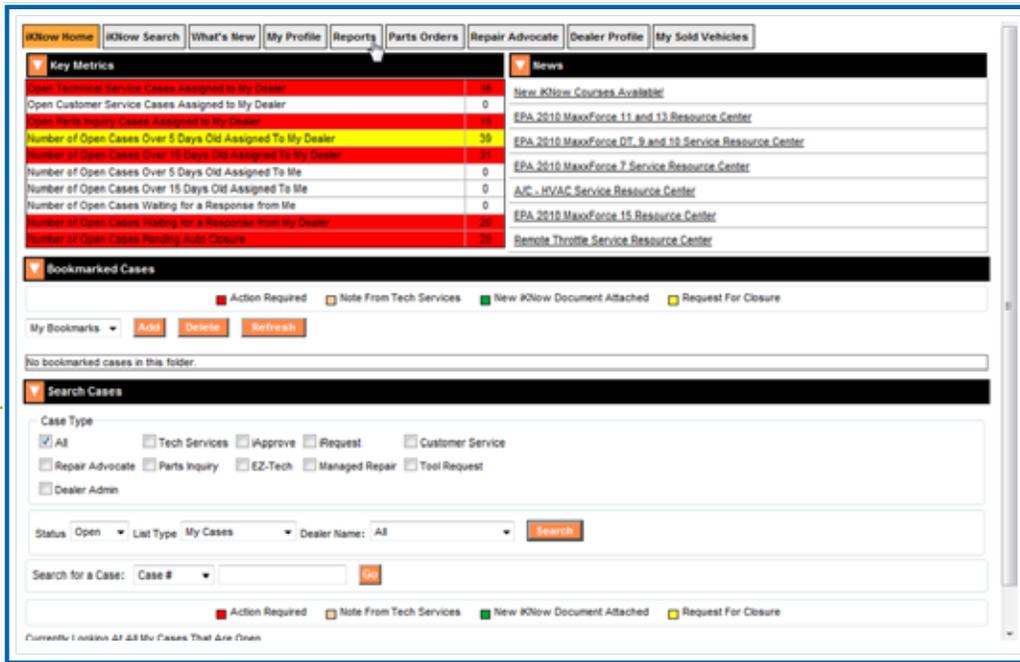
1. *First, navigate to iKNow.*
2. *Then click on the Reports tab.*
3. *Select the Dealer Monitor Report link.*
4. *And change preferences as needed.*



Here we can see the link to iKNow Home. We'll click on it to navigate to iKNow.

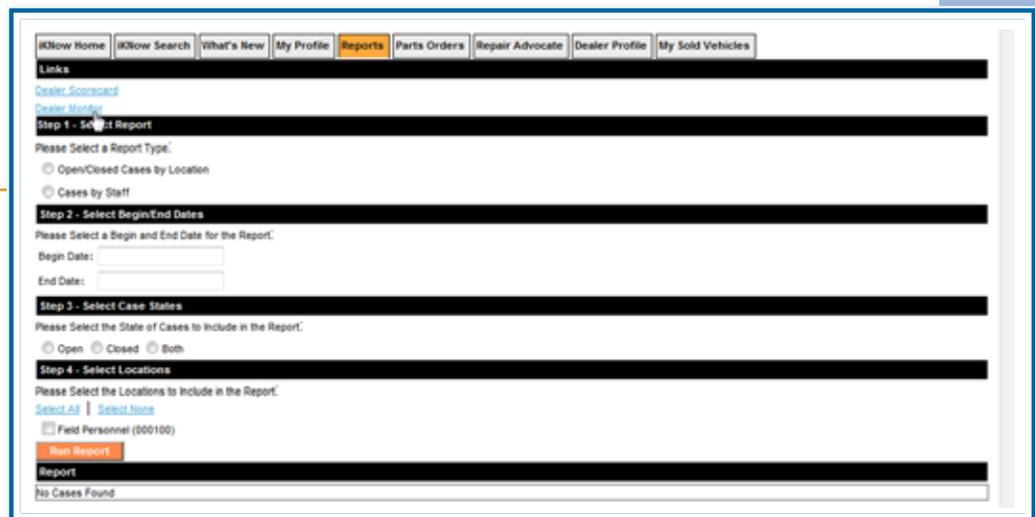
## LESSON 3: MONITORING THE REPAIR PROCESS

### Dealer Monitor Report Fields



iKNow opens to the Home screen. As you know, the Home screen displays Key Metrics and News articles. Here we can also display cases based on type, status and assignment or search for a specific case-by-case number. To generate the Dealer Monitor Report, navigate to the Reports tab.

At the top of this tab are two links: one for the Dealer Scorecard and the other for the Dealer Monitor. We'll click the Dealer Monitor link.



## LESSON 3: MONITORING THE REPAIR PROCESS

**iKNow Dealer Monitor**

Monitor Preferences

Case Type:  Tech Services,  Approve,  Request,  Customer Service,  Repair Advocate,  Parts Inquiry,  EZ-Tech,  Managed Repair,  Tool Request,  Parts Critical

Location: INTERNATIONAL TRUCKS (00001-000)

Incoming Case Files Only  All Open Case Files

This Page Automatically Refreshes Every 5 Minutes [Refresh Now](#)

Action Required  Note From Tech Services  New iKNow Document Attached  Request For Closure

Case #	Dealer ID	Name	Status ID	Vehicle Status	Case Type	Days Open	RO #	Customer	Chassis #	Group Name	Fleet Name
1327063	795245-000	Roberto Anaya	ACTION REQ	Vehicle Down - At Dealer	TECHNICAL SERVICE	21	36264	rapid beaters	2H595116	Engine V8	
1329371	795245-000	Roger Huett	ACTION REC'D		TECHNICAL SERVICE	18		SOUTHEASTERN FREIGHT LINES INC	C3462721	Engine Big Bore Support	Southeastern Freight Lines
1352038	795245-000	Roger Huett	ACTION REQ	Vehicle Down - At Dealer	TECHNICAL SERVICE	1	36698	tdot	B3364289	Engine Big Bore Support	
1352642	795245-000	Dusty Cobb	REQ_CLOSURE		PARTSINQUIRY	1		GELCO CORP	88651617	Parts Inquiries	
1342690	795245-000	Cory Smith	REQ_CLOSURE		PARTSINQUIRY	9			34572368	Parts Inquiries	
1347573	795245-000	Cory Smith	REQ_CLOSURE		PARTSINQUIRY	4		BANDERA TRUCKING CO.	63241929	Parts Inquiries	

The Dealer Monitor Report is displayed, with an entry in the listing for each case for the dealership. If we wanted to see all the action requests listed together, we could sort on Status ID. Let's click on this column heading.

**iKNow Dealer Monitor**

Monitor Preferences

Case Type:  Tech Services,  Approve,  Request,  Customer Service,  Repair Advocate,  Parts Inquiry,  EZ-Tech,  Managed Repair,  Tool Request,  Parts Critical

Location: ROBERTS TRUCK CENTER-ABL (795245 - 000)

Incoming Case Files Only  All Open Case Files

This Page Automatically Refreshes Every 5 Minutes [Refresh Now](#)

Action Required  Note From Tech Services  New iKNow Document Attached  Request For Closure

Case #	Dealer ID	Name	Status ID	Vehicle Status	Case Type	Days Open	RO #	Customer	Chassis #	Group Name	Fleet Name
1329371	795245-000	Roger Huett	ACTION REC'D		TECHNICAL SERVICE	18		SOUTHEASTERN FREIGHT LINES INC	C3462721	Engine Big Bore Support	Southeastern Freight Lines
1352038	795245-000	Roger Huett	ACTION REQ	Vehicle Down - At Dealer	TECHNICAL SERVICE	1	36698	tdot	B3364289	Engine Big Bore Support	
1352642	795245-000	Dusty Cobb	REQ_CLOSURE		PARTSINQUIRY	1		GELCO CORP	88651617	Parts Inquiries	
1342690	795245-000	Cory Smith	REQ_CLOSURE		PARTSINQUIRY	9			34572368	Parts Inquiries	
1347573	795245-000	Cory Smith	REQ_CLOSURE		PARTSINQUIRY	4		BANDERA TRUCKING CO.	63241929	Parts Inquiries	

Now all listings are sorted by Status ID.

## LESSON 3: MONITORING THE REPAIR PROCESS

### Status of Estimates

If your dealership uses the Repair Management System to create estimates, you can View estimates by status, location, date range, and other variables and View the Operations Quoted Not Sold Report. We'll look more closely at each of these features next.

### • Navigating to Repair Management



You'll find the Repair Management link in the Write Up menu. Hover over Write Up in the menu bar to open the menu. Then click on Repair Management.

## LESSON 3: MONITORING THE REPAIR PROCESS

### Repair Management Home Screen

When you navigate to Repair Management, you'll see the Service Estimating Screen.

1. Menu Bar
2. Estimate Header
3. Estimate Parameters
4. Advance Search
5. Estimate List

The screenshot shows the 'Repair Management' interface. At the top, there's a 'Service Estimating Home' header. Below it is a navigation menu with 'Home', 'Estimate', 'Dealer', 'Customer', 'Vehicle', and 'Links'. A search bar contains 'UG GANTERA INTERNAL ACCT (000000212)' and '4351 WIMFIELD ROAD, WARRENVILLE, IL 60555'. A 'Vehicle' dropdown is set to 'Estimate'. Below the search bar, it says '3 records were found'. A link for 'My open estimates from past 7 days' and an 'Advanced Search' link are visible. The main area contains a table of estimates.

Estimate #/ID	Account	P.G.	Total	Promised	M/S	Vehicle	Unit	Customer	Status	Assigned/Changed
412387 (175464)	000009-212	\$0.00	\$802.06	2012-03-27	5.3	2006 - 4300 - 4303 SBA 402 - DT466 245 - WPO2000 OCV - 11700AAAB00H127030		New Day Trucking 000000212	In Process	Oil Maint 2012-03-27
412209	000009-212	\$0.00	\$463.40	2012-03-27	5.5	2005 - 7400 - 7403 SFA 404 - MAXXTORQUE 1E - 330MR2230 GOV - 1K70EA2Z0UJ010019		Cartech Enterprise 000000212	In Process	Oil Maint 2012-03-27
412095.8	000009-212	\$0.00	\$1891.26	2012-03-27	4.3	2005 - 4300 - 4303 SBA 402 - DT466 245 - 10E4R101010 3 - PLAK 2600 GOV - 1K700AAAB00H1170		NAVISTAR FLEET / Location 1E	Hold (auto)	Oil Maint 2012-03-27

#### Menu Bar

The black menu bar under the Repair Management logo provides you with access to the features of this system. You can learn more about these features by taking the Repair Management training that is available on the Learning Management System. For the purposes of this program, we'll concentrate on the features used to view estimates and generate reports.

#### Estimate Header

Below the menu bar is the estimate header. This area is used to specify key inputs when creating an estimate, including the dealer location, vehicle and customer.

#### Estimate Parameters

A drop-down list provides numerous options to specify which estimates to display, from estimates assigned to the individual user for the last two days to all estimates (both open and closed) for the last 30 days.

#### Advanced Search

The Advanced Search link displays more specific search criteria. You can set a custom beginning and end date for your search or search on a specific field, such as Estimate ID, Repair Order Number, Chassis Number, or Unit Number. You can include closed estimates or search on a specific location, customer or vehicle.

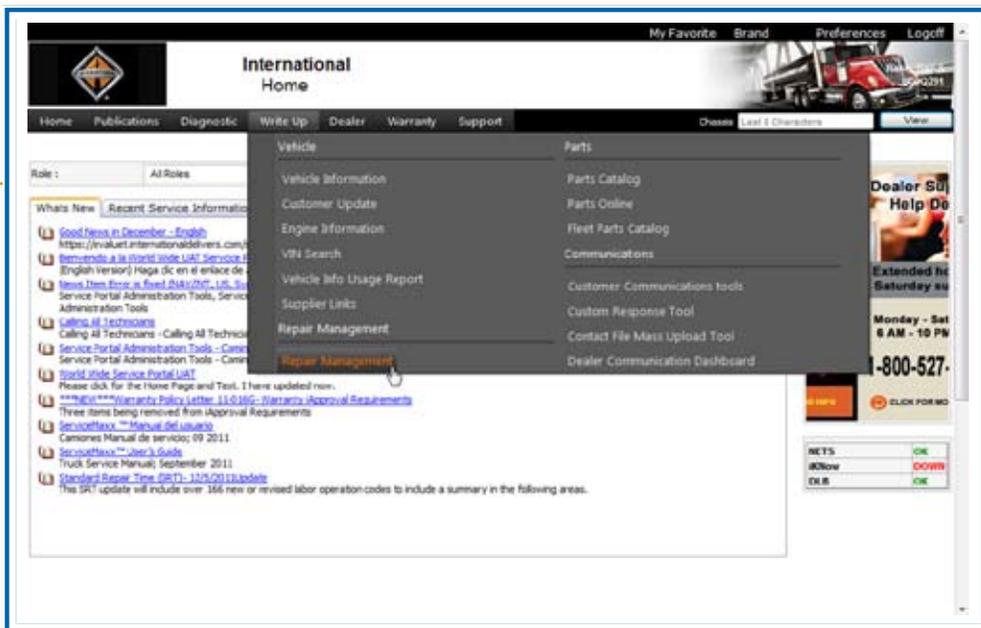
#### Estimate List

Depending on the criteria you've set, you'll see a list of estimates. Key fields displayed include the Estimate Number, Dealer Account Number, Estimate Total, Promised Date, Vehicle Description, Customer, and Status. You can view the details of the estimate by clicking the Estimate Number.

## LESSON 3: MONITORING THE REPAIR PROCESS

### Viewing Estimates in Repair Management

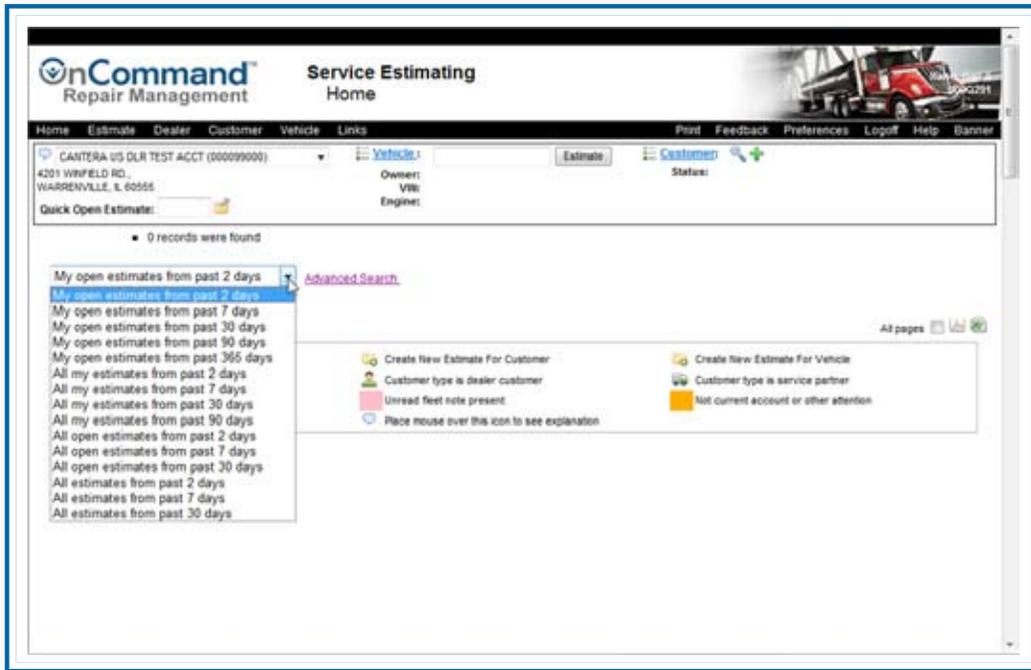
Now let's take a look at how to navigate to the Repair Management System and view estimates.



We'll begin at the Service Portal Home screen. Here we can see the seven main menu options: Home, Publications, Diagnostic, Write Up, Dealer, Warranty, and Support.

The link to Repair Management is in the Write Up menu. We'll hover over it to see all the options. At the bottom of the first column is the link to Repair Management. We'll click on it to navigate to the system.

## LESSON 3: MONITORING THE REPAIR PROCESS

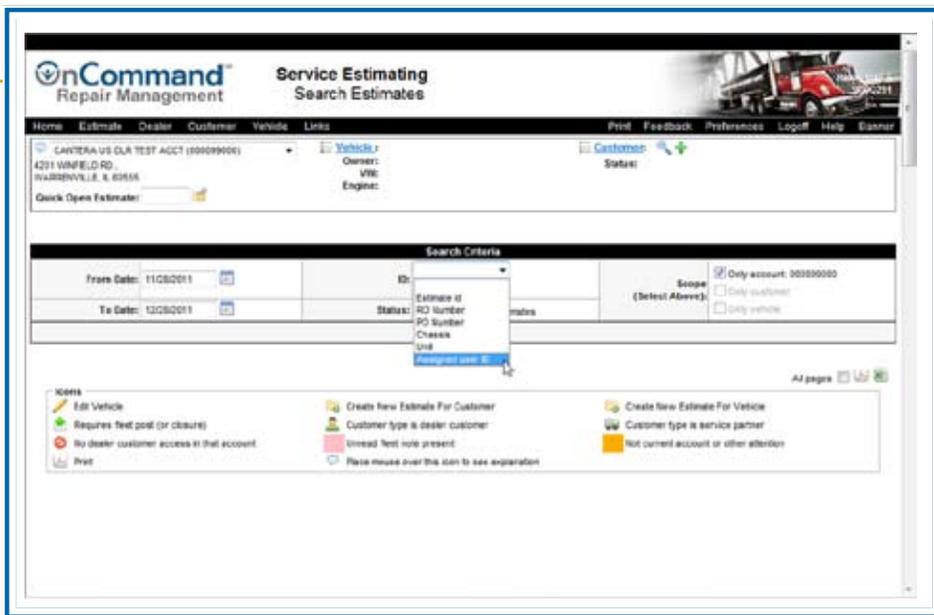
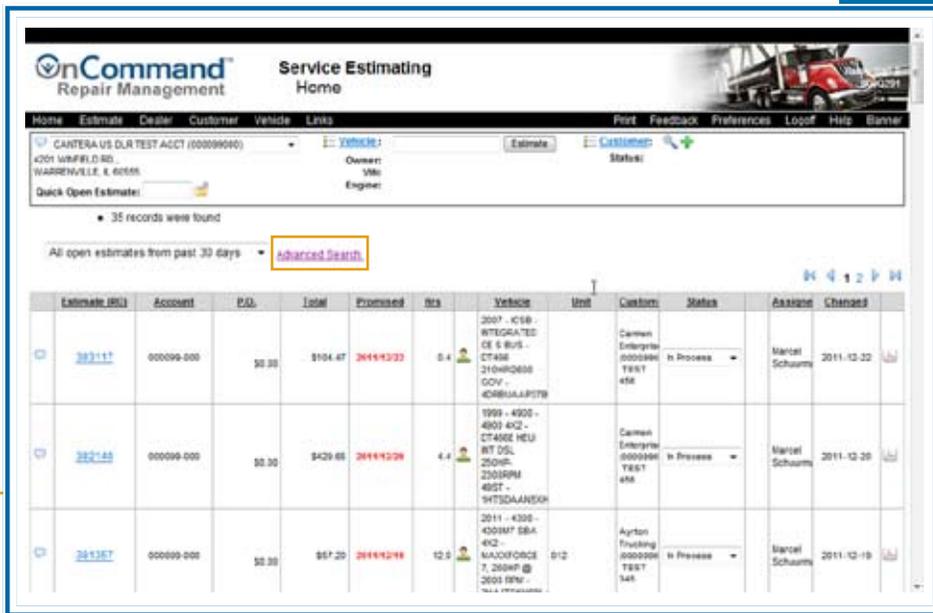


The Repair Management System opens in a separate window. In this demonstration, the estimate parameters are set to default to “My open estimates for the past 7 days.” As a service manager, you’ll probably want to view all estimates written for your dealership and may want to view them for a longer timeframe. We’ll click on the drop-down arrow to see what’s available.

There are a number of options for viewing estimates that are assigned to the user – ranging from “My open estimates from the past 2 days” to “All my estimates from the past 90 days.” However, none of these will display estimates for the entire location. You’ll need to choose one of the last six options to view either “All open estimates” or “All estimates (both open and closed)” from the past 2, 7 or 30 days. Let’s look at all open estimates for the past 30 days.

## LESSON 3: MONITORING THE REPAIR PROCESS

The list of estimates is displayed. You can scroll through them and open any that you would like to review in detail. If you want to view only those estimates prepared by a certain service advisor, you would use the Advanced Search. Just click on the link.



In Advanced Search, the date range defaults to the last month. And the Scope defaults to the current dealer location. Since no vehicle or customer was selected before we clicked on the Advanced Search link, these options are grayed out. Here in the center of the Advanced Search options is the ID drop-down list. Click on the drop-down arrow to see the available search fields.

## LESSON 3: MONITORING THE REPAIR PROCESS

At the bottom of the list is Assigned User ID. We'll use this option to search for a particular service advisor. Now enter the service advisor's User ID in the text box below the drop-down box. Then click the Search button.

The screenshot shows the 'Service Estimating Search Estimates' interface. At the top, there are navigation tabs: Home, Estimate, Dealer, Customer, Vehicle, Links. Below this, account and vehicle information is displayed. The 'Search Criteria' section includes:
 

- From Date: 11/28/2011
- To Date: 12/28/2011
- Assigned user ID: UD06XSP
- Status:  Include Closed Estimates
- Scope:  Only account: 00009000,  Only customer,  Only vehicle

 A 'Search' button is highlighted with a mouse cursor. Below the search criteria is an 'Icons' section with various tool icons and their descriptions, such as 'Edit Vehicle', 'Create New Estimate For Customer', and 'Requires fleet post (or closure)'.

Here you see a list of all estimates for this service advisor for the last month. You can scroll through the list and open any estimates you'd like to review in further detail.

The screenshot shows the search results for the same criteria. It indicates '18 records were found'. The results are displayed in a table with the following columns: Estimate ID, Account, P.O., Total, Promised, Hrs, Vehicle, Unit, Custom, Status, Assignee, and Chancel. Three rows are visible in the table:

Estimate ID	Account	P.O.	Total	Promised	Hrs	Vehicle	Unit	Custom	Status	Assignee	Chancel
400580 (124554)	000099-000	\$0.00	\$131.14	2012/02/02	1.5	2008 - 7400 - 7400 SBA 6X4 - MAXXFORCE DT 230HP2400 GOV. 1HTWGAAR96L		Carmen Enterprise (000099) TEST 486	In Process	Marcel Schuurms	2012-02-02
400333 (0043114)	000099-000	\$0.00	\$62.52	2012/02/02	0.5	2005 - 4200 - 4200 SBA 4X2 - VT365 200HP200HP PEAK 2000 GOV. 1HTWPAFM35K		Carmen Enterprise (000099) TEST 486	In Process	Marcel Schuurms	2012-02-02
399580 (236845)	000099-000	\$0.00	\$2051.18	2013/02/01	3.5	2008 - 7400 - 7400 SBA 6X4 - MAXXFORCE DT 230HP2400		Carmen Enterprise (000099) TEST	In Process	Marcel Schuurms	2012-02-01

## LESSON 3: MONITORING THE REPAIR PROCESS

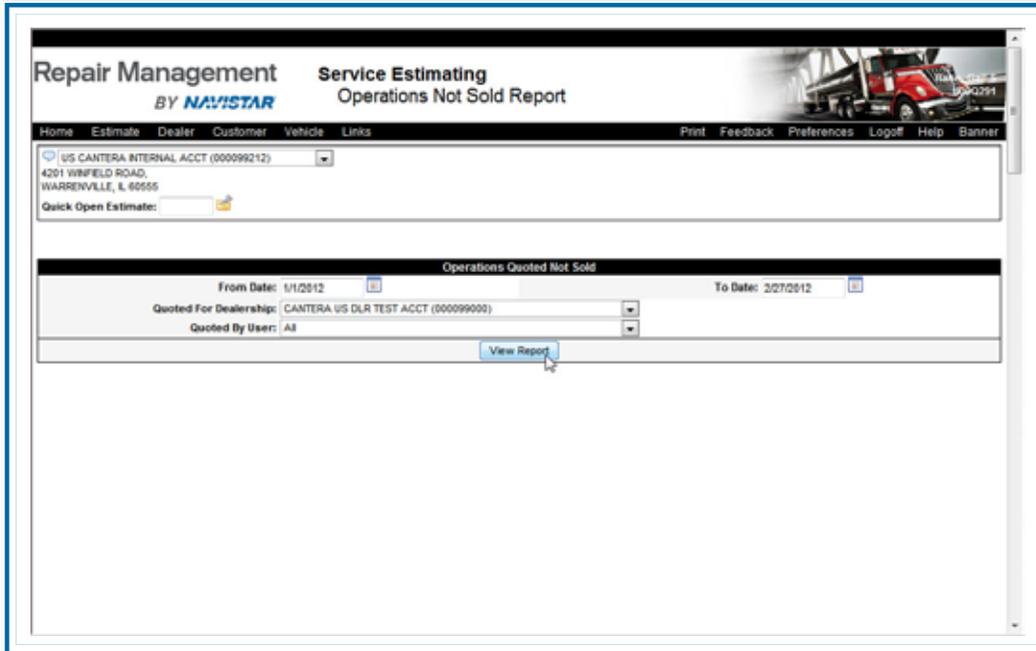
### Operations Quoted Not Sold

You'll find the Operations Quoted Not Sold Report in the Dealer menu of the Repair Management System. The Operations Quoted Not Sold Report allows the user to view the estimate items quoted in estimates but not sold.

Estimate ID	Total	Promised	Hrs	Vehicle	Unit	Customer	Status	Assigned/Changed
452187 (578464)	\$882.86	2012/02/27	5.3	2006 - 4300 - 4300 SBA 4X2 - QT466 245 HRQ2600 GOV - IHTMMAAN56H187836		New Day Trucking (00009821...	In Process	Gal Hahn 2012-02-27
452209	\$0.00	\$853.52	2012/02/27	2.5	2008 - 7400 - 7400 SFA 4X4 - MAXXFORCE 10 316HRQ200 GOV - IHTWEAZD05J570019	Carmen Enterprises (00009821...	In Process	Gal Hahn 2012-02-27
412205-5	\$0.00	\$1831.28	2012/02/27	4.3	2005 - 4300 - 4300 SBA 4X2 - QT466 ST 190HR195HP 3 PEAK 2600 GOV - IHTMMAAN56H75172	NAVISTAR FLEET / Location 10	Hold (auth)	Gal Hahn 2012-02-27

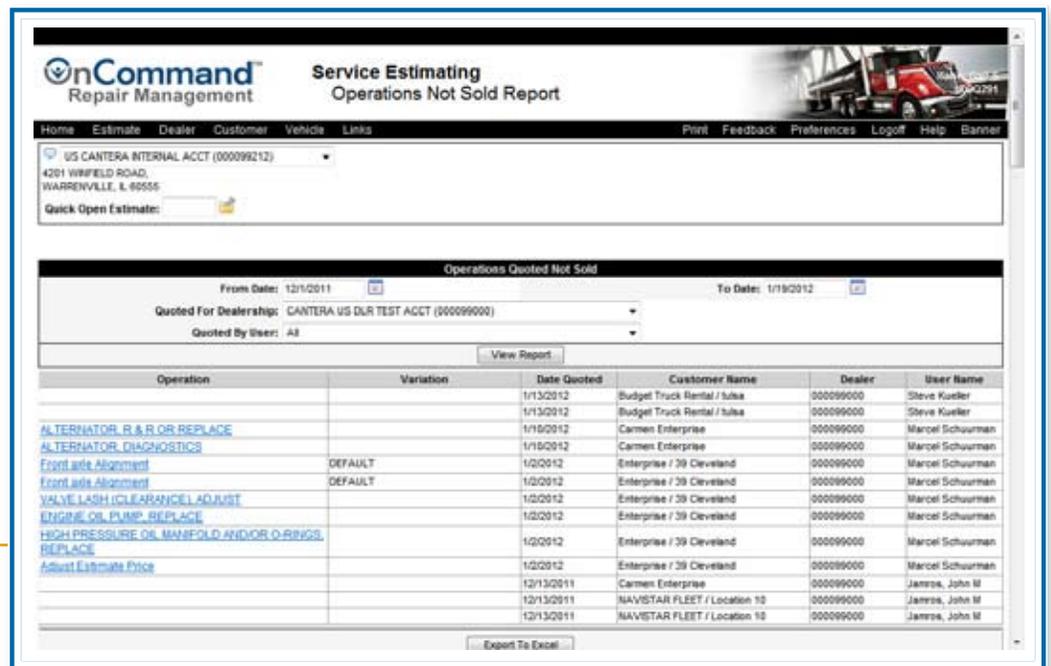
From the Service Estimating Home page, hover over Dealer. Hover over Reports at the bottom of the menu. Click on Operations Quoted Not Sold.

## LESSON 3: MONITORING THE REPAIR PROCESS



This screen allows you to set the criteria for the estimates you'd like to view. You can specify a date range, choose a dealership location from the drop-down list, and look at operations for all users or a specific user.

The result is a table showing all operations quoted but declined. Each operation is a link which takes you to the estimate in which each operation appears.



## LESSON 3: MONITORING THE REPAIR PROCESS

### Monitoring Service Personnel Resource Usage

There are two reports available to help you monitor how much your service personnel are using two key resources available to them: the Vehicle Information screen and Repair Management estimates.

#### Estimate Usage Report

Like the Operations Quoted Not Sold Report, the Estimate Usage Report is accessed from the Dealer menu.

The screenshot displays the Navistar Service Portal interface. At the top, there are tabs for 'Repair Management' and 'Service Estimating Home'. Below the navigation bar, there is a search area with 'Vehicle:' and 'Estimate:' fields. A dropdown menu is open over the 'Reports' section, showing options like 'Estimate Usage' and 'Operations Quoted Not Sold'. The main content area contains a table of estimates with columns for 'Total', 'Promised', 'Hrs', 'Vehicle', 'Unit', 'Customer', 'Status', and 'Assigned/Changed'.

Estimate (RZ)	Total	Promised	Hrs	Vehicle	Unit	Customer	Status	Assigned/Changed
412187 (578484)	\$882.86	2012/02/27	5.3	2006 - 4300 - 4300 SBA 4X2 - DT466 245 HP2600 GOV		New Day Trucking (00009921)	In Process	Gal Hahn 2012-02-27
412208	\$0.00	\$853.52	2012/02/27	2.5	2006 - 7400 - 7400 SFA 4X4 - MAXXFORCE 10 310HRQ200 GOV - SHTYEAZRXJ4670019	Carmen Enterprise (00009921)	In Process	Gal Hahn 2012-02-27
412205-0	\$0.00	\$1031.28	2012/02/27	4.3	2005 - 4300 - 4300 SBA 4X2 - DT466 ST 195HR195HP PEAK 2600 GOV - SHTMMAAMX5HE75178	NAVISTAR FLEET / Location 10	Hold (auth)	Gal Hahn 2012-02-27

Just click on the first item in the Reports sub-menu.

## LESSON 3: MONITORING THE REPAIR PROCESS

**Repair Management** **Service Estimating**  
**BY NAVISTAR** **Estimate Usage Report**

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

US CANTERA INTERNAL ACCT (00009212)  
 4201 WINFIELD ROAD,  
 WARRENVILLE, IL 60555  
 Quick Open Estimate:

**Estimate Usage Report**

From Date: 1/1/2012 To Date: 2/27/2012

Estimate Usage for Dealership: CANTERA US DLR TEST ACCT (000099000)  
 Estimate Usage for User: All

[View Report](#)

You'll be presented with search criteria for the report. Once you've selected them, click the View button.

**Repair Management** **Service Estimating**  
**BY NAVISTAR** **Estimate Usage Report**

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

US CANTERA INTERNAL ACCT (00009212)  
 4201 WINFIELD ROAD,  
 WARRENVILLE, IL 60555  
 Quick Open Estimate:

**Estimate Usage Report**

From Date: 1/1/2012 To Date: 2/27/2012

Estimate Usage for Dealership: CANTERA US DLR TEST ACCT (000099000)  
 Estimate Usage for User: All

[View Report](#)

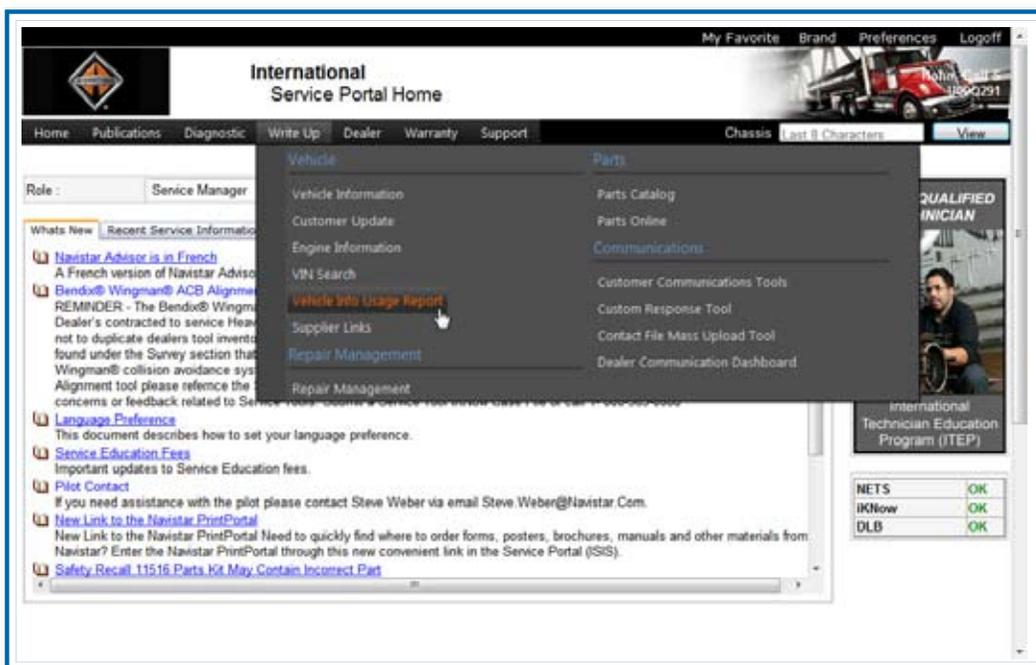
Account	User Name	Total Estimates Written	Estimates Per Day	Total Estimate Value	Average Estimate Value	% Of Total Estimate Value	Total Estimates Closed	Closed Estimate Value	% Of Closed Estimate Value
000099000	Brian Mulshine	13	0.23	\$963.94	\$74.15	0.44 %	0	\$0.00	0.00 %
000099000	Jamroz, John M	7	0.12	\$8661.68	\$1237.30	3.95 %	0	\$0.00	0.00 %
000099000	Marcel Schuurman	59	1.04	\$56416.29	\$956.21	25.70 %	34	\$31329.42	22.35 %
000099000	Reach, Scot H	24	0.42	\$29031.15	\$1242.97	13.59 %	23	\$29031.15	21.20 %
000099000	Steve Kueler	5	0.09	\$1437.91	\$287.58	0.66 %	0	\$0.00	0.00 %
000099000	Poisant, Michel	38	0.67	\$45459.15	\$1196.29	20.71 %	36	\$42241.34	30.14 %
000099000	Vandenhuyvel, Ted J	12	0.21	\$24282.98	\$2023.58	11.06 %	11	\$24282.98	17.33 %
000099000	Piquette, Daniel R	14	0.25	\$47837.81	\$3416.99	21.00 %	7	\$11196.67	7.99 %
000099000	Aysla, Lakshmi	2	0.04	\$940.84	\$470.42	0.43 %	2	\$940.84	0.67 %
000099000	Richard Hansen	4	0.07	\$3924.77	\$981.19	1.79 %	1	\$598.11	0.43 %
000099000	Paul Massa	1	0.02	\$0.00	\$0.00	0.00 %	0	\$0.00	0.00 %
	<b>Grand Total</b>	<b>178</b>	<b>3.12</b>	<b>\$219487.50</b>	<b>\$1233.08</b>	<b>100.00 %</b>	<b>113</b>	<b>\$140154.10</b>	<b>100.00 %</b>

[Export To Excel](#)

Here you see a list of all employees who fit the criteria and the associated counts, totals and averages for the timeframe in the report.

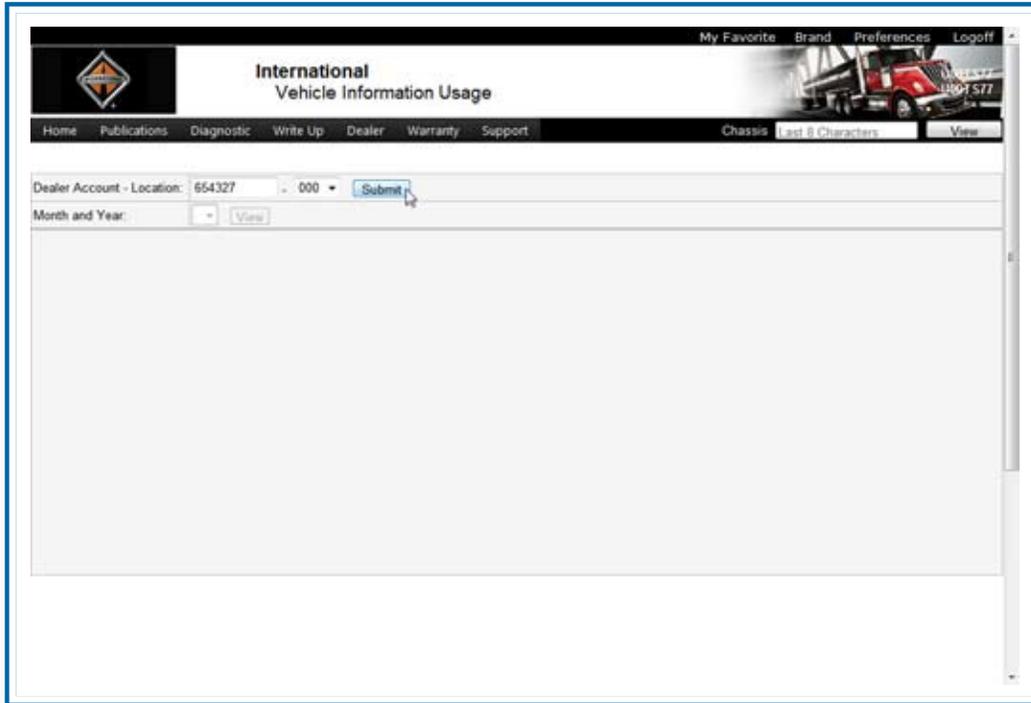
## LESSON 3: MONITORING THE REPAIR PROCESS

### Navigating to Vehicle Information Usage



You'll find the Vehicle Information Usage link in the Write Up menu. Hover over Write Up in the menu bar to open the menu. Then click on Vehicle Information Usage.

## LESSON 3: MONITORING THE REPAIR PROCESS



The screenshot shows the 'International Vehicle Information Usage' page. At the top, there is a navigation bar with links for 'Home', 'Publications', 'Diagnostic', 'Write Up', 'Dealer', 'Warranty', and 'Support'. On the right side of the navigation bar, there are links for 'My Favorite', 'Brand', 'Preferences', and 'Logoff'. Below the navigation bar, there is a search area with a 'Submit' button. The search area contains the text 'Dealer Account - Location: 654327' and a drop-down menu with '000' selected. Below the search area, there is a 'Month and Year' section with a 'View' button. The main content area is currently empty.

The Vehicle Information Usage Report provides statistics on how frequently dealership personnel have visited the Vehicle Information screen. The Dealer Account defaults to your location. If your User ID is associated with more than one location, you can select the one you want from the drop-down list. Then click the Submit button.

## LESSON 3: MONITORING THE REPAIR PROCESS

International  
Vehicle Information Usage

Home Publications Diagnostic Write Up Dealer Warranty Support Chassis Last 6 Characters View

Dealer Account - Location: 654327 000 Submit

Month and Year: January, 2012 View

**Dealer Details**

Business Name:	CHICAGO INTL TRK-CENTRAL	Shipping Name:	CHICAGO INTL TRK-CENTRAL
Business Address:	1827 WALDEN OFF SQ ST275 SCHAUMBURG, IL 60173	Shipping Address:	4655 SO. CENTRAL AVE CHICAGO, IL 60638
Phone Number:	(708) 496-7500	Fax Number:	(708) 496-7530
Toll Free Number:	( ) -		

Name	User ID	Job Class	Page	Component	No. of Visits
Subramanyam, Shankar	YYY2520	SE003, Service Manager	VehicleInfo	Summary	3
Weber, Steve	YYYSLW3	SE003, Service Manager	Scorecard	Cal Scorecard	1

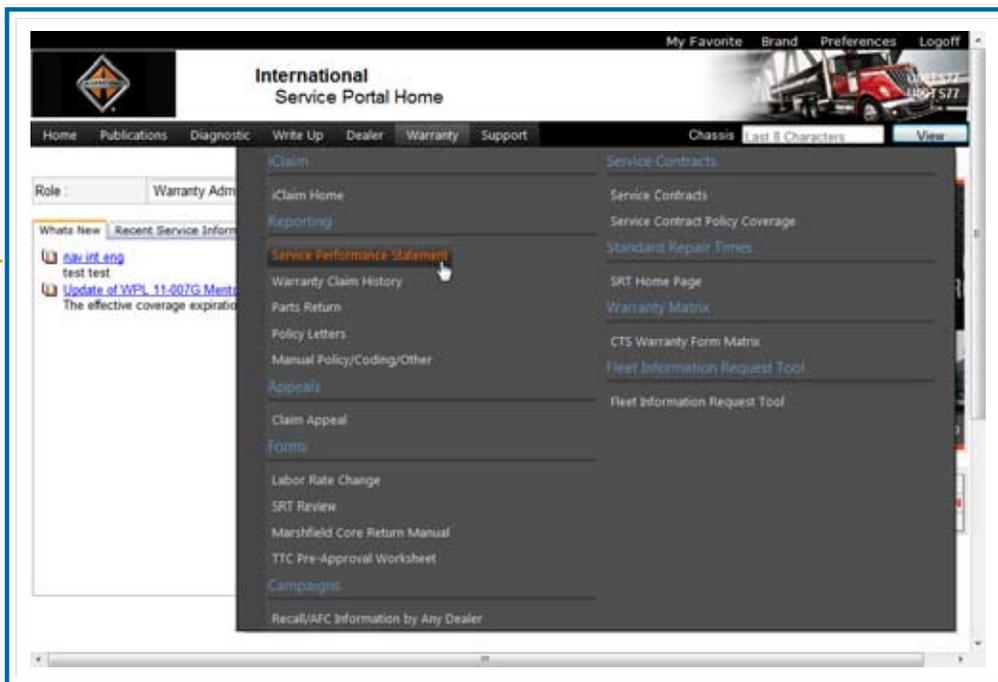
A table, arranged by employee name, is displayed for the current month. You can select a previous month by selecting it from the Month and Year drop-down list.

## LESSON 3: MONITORING THE REPAIR PROCESS

### Monitoring Performance on Warrantied Repairs

A number of resources are available to monitor your dealership's performance on warrantied repairs: the Service Performance Statement, Warranty Claim History, Claim Appeal, and Parts Return Requests.

#### • Navigating to Service Performance Statement



• You'll find the Service Performance Statement link in the Warranty menu. Hover over Warranty in the menu bar to open the menu. Then click on Service Performance Statement.

## LESSON 3: MONITORING THE REPAIR PROCESS

### Service Performance Statement

The Service Performance Statement provides a month-by-month snapshot of your dealership's performance on a number of measures. Access to this feature is controlled in the Employee Registration system. Your dealership's Admin is responsible for setting up appropriate access rights for dealership personnel.

The screenshot shows the 'International SPS' interface. At the top, there are navigation tabs: Home, Publications, Diagnostic, Write Up, Dealer, Vehicle, and Report. Below these are filters for Dealer Location (4789433-000) and Report Month (2011 February). There are buttons for Submit, Back, and Report Explanation. The main content area is divided into sections: Dealer Information (Business Name: INTERNATIONAL TRUCKS INC, Shipping Address: 4201 WARRICKVILLE RD, WARRICKVILLE, IL, Dealer Account & Location: 478943-000), Contact Information (Phone: 630-655-5100, Fax: 630-655-3163), Service Details (Labor Rate: 112, Service Days: 76, Number of Techs: 0, Number of Self-Starters: 5, CS&TSM: JOHN GROSLINGER), Manager Details, and a table for Business Performance.

Business Performance					
Total Warranty	1,055,526	Labor	556,226	Parts	499,300
Subst # Mils	651,721	Prod # Mils	548,545	Pct Adjusted	80.90%
Policy #	16,827	Parts # Wtry			
BY Crd Pwr	0.13	0.4	Performance for B.E.	0.3	
Vehicle Registered					
Median	1,593/73	1,424/25	1,624/10		

#### Dealer Location

The Dealer Location drop-down list can be used to generate the Service Performance Statement for each location associated with your dealership. Just select it from the drop-down list.

#### Report Month

The report month drop down list allows you to select the month for the report. It defaults to the most recent available month.

#### Submit Button

Use the Submit button to generate the report after selecting a different dealer location or month.

#### Back Button

The Back button returns you to the screen you were previously viewing.

#### Report Explanation Button

The Report Explanation button provides access to a complete explanation of this report.

**The Service Performance Statement provides numerous metrics about your dealership's performance.**

- 1. Dealer Location**
- 2. Report Month**
- 3. Submit Button**
- 4. Back Button**
- 5. Report Explanation**

## LESSON 3: MONITORING THE REPAIR PROCESS

The Dealer Profile displays a summary of each dealer location's certifications and program participation. With more information on your dealership's capabilities, Navistar can quickly refer customers to the ideal dealer location.

The screenshot shows the International SPS Dealer Profile for dealer location 678M30-003. The page is divided into several sections:

- Dealer Information:** Business Name: INTERNATIONAL TRUCKS INC, Shipping Address: 4201 WYRRBVILLE RD, WARRICKVILLE, IN, Dealer Account & Location: 678M30-003.
- Contact Information:** Phone: 630-555-5100, Fax: 630-555-3183.
- Service Details:** Labor Rate: 112, Service Days: 36, Number of Techs: 0, Number of Self-Starters: 5, CSE/TSM: JOHN GROSLINGER, Daily Shop: Y, Wrecker Service: N, Address: Y, Road Service: N.
- Manager Details:** A link to view manager information.
- Warranty Performance:** Total Warranty: 1,055,526, Labor: 556,226, Parts: 499,300, Adjusted Pct: 10.00%.
- ET Case Pct:** 0.12, 0.9, Performance for 0.8, 0.7.
- Vehicle Repaired:** Medium: 1,593/73, 1,424/93, 1,624/10.

### Dealer Information

The Dealer Information section lists your dealership's address and account number.

### Contact Information

The Contact Information section displays the selected location's phone and fax numbers.

### Service Details

The Service Details section displays information about the labor rate, size and services offered at the selected location. You can maintain many of these fields through the Update Your Service Information feature in the Dealer menu.

### Manager Details

The Manager Details section provides a link to information on personnel in various positions in your dealership. This information comes from the Employee Registration System.

**Here you can see the sections of the Service Performance Statement for:**

- 1. Dealer Information**
- 2. Contact Information**
- 3. Service Details**
- 4. Manager Details**

## LESSON 3: MONITORING THE REPAIR PROCESS

### Warranty Performance

Warranty Performance					
Total Warranty	1,355,526	Labor	556,226	Parts	499,330
Subnet \$ Mth	661,721	Paid \$ Mth	548,946	Pct Adjusted	18.00%
Policy 90	56,027	Parts 55 Wky			
01 Cost For Vehicles Reported					
Medium	1,553,773	1,424,223	GREEN		1,624,113
Heavy	1,647,714	885,9	GREEN		790,6
Severe	1,448,029	947,15	GREEN		367,8
Bus	1,416,334	1,431,183	GREEN		1,356,93
02 Cost For Vehicles Reported					
Medium	282	0/0	N/A		0/0
Heavy	/	/			/
Severe	284/8	306/5	N/A		306/2
Bus	170/233	282/73	GREEN		290/3
	110   February 2011	113		North America	
Total Claims	1885	2626			
Total Sections	1336	2065			
Claim Days					
Pat to Comp	13.6	12.2			
Comp to Sent	9.5	11.2			
Pat to Sent	0	0		0	
Sent to Paid	3.9	3.7			
Pat to Paid	27	27.1			
Claims on Hold, February 2011					
Dealer	0	0		0	
North America					
Parts Return Status					
	110   February 2011	113		North America	
Requested	92.0	327.0			
Returned	86.0 (Claims not yet Returned)	313.0			

Here you can see the sections of the Service Performance Statement for:

1. **Warranty Performance**
2. **01 Cost of Vehicles Repaired**
3. **03 Cost of Vehicles Repaired**
4. **Claim Totals**
5. **Claim Days**
6. **Claims on Hold**

The Warranty Performance section provides a comprehensive report on warranty dollars paid to your dealership over the past twelve months. This report helps your dealership expedite claims, improving your cash flows.

## LESSON 3: MONITORING THE REPAIR PROCESS

### Warranty Performance

The first part of this section provides dollars paid for: Total Warranty, Labor, Parts, Policy 98, and Parts 55 Warranty. It displays total claim dollars submitted and total claim dollars paid over the past six months. The Percent of Claims Adjusted field is the ratio of adjustments to total claims. Lower figures indicate more accurate claims.

### 01 Cost for Vehicle Repaired

The 01 Cost for Vehicle Repaired section represents warranty work done after delivery to the customer during the vehicle's standard warranty period. This information is provided for three rolling periods: the past twelve months, the past six months, and the past three months.

### 03 Cost for Vehicle Repaired

The 03 Cost for Vehicle Repaired section represents warranty work done prior to customer delivery. This information is provided for three rolling periods: the past twelve months, the past six months, and the past three months.

### Claim Totals

In the next section of the Warranty Performance section you'll find the Total Claims submitted for warranty service and the total number of sections, or repairs, per 12-month period.

This information can be used to analyze the amount of warranty work done in your service center. It is also useful to determine the workload on your warranty administrator.

### Claim Days

In the Claim Days section you find information on the time required for a warranty claim to be processed.

- "Fail to Complete" displays the average number of days from repair order open date until it is complete. This is a measure of your service center's efficiency.
- "Complete to Sent" displays the average number of days between repair completion and the time a claim is sent to Navistar. This is an indicator of your warranty administrator's performance.
- "Sent to Paid" displays the average number of days between the time the claim is sent to Navistar and the time the claim is processed. This measures Navistar's efficiency in processing warranty claims.
- "Fail to Paid" represents the average days for the entire cycle.

### Claims on Hold

The Claims on Hold section shows the number of warranty claims that are currently on hold. Averages for all North American dealers demonstrate how your warranty processing system compares to the rest of the dealer network.

## LESSON 3: MONITORING THE REPAIR PROCESS

The remaining sections of the Service Performance Statement deal with parts returns, service program parameters, Service Level Authorization and Diamond Club.

Parts Return Status		YTD (February 2017)	PPT	North America
Requested		92.0	323.0	
Returned		85.0 <a href="#">Claims not yet Returned</a>	313.0	
Within 60 Days		85.0	309.0	
Beyond 60 Days		0.0	4.0	
Parts Ret Pct		93.5%	96.9%	

Claims with Parts Returned YTD	
Eaton Hybrid Service Provider	N
DPF Cleaning Capable	
Fuel Tank Cleaning Capable	N
Accelerated Service	

Service Level Authorization(SLA)	
<a href="#">Service Level Authorization(SLA) - Please click</a>	

Diamond Club Program Participation			
Diamond Club Enroll	Y	On Command Service Partner	Y
On Command Repair Management	Y	<a href="#">Estimate Summary</a>	Commiss Dealer Code 13477
Performance PM Certified	Y		Cert ISO & ISM 2007 Y - 10/10/2008
ProStar Ready			MaxForce H and I3 Technical Readiness
Phase 1	Y	Phase I	Y - 8/26/2016
Phase 2	N	Phase II	N
Phase 3	N		

PPT Diamond Club Education Goals		
Goal Name	Goal Instance	Goal Completed
DC Manager Certified	N	
Service Writer Certified	N	
Shifts Certified(Technician Certified)	N	

Diamond Club Points						
Performance Goal	Growth of Total Service Sales	Parts Return Points	Claim Days Points	ESD Service Estimation Points	Enter Points	Total Points Earned
Period 1 Nov 1 - Jan 31					<input type="button" value="Enter Points"/>	

### Parts Return Status

The Parts Return Status section displays information on parts returns, including the total number of requested parts returns, the number actually returned, and those returned within 60 days and beyond 60 days. Parts not returned within 60 days may not be paid by the vendor, and may be charged back.

### Service Program Parameters

The Service Program Parameters section indicates the services that your dealership performs, including Eaton Hybrid Service, DPF Cleaning, Fuel Tank Cleaning and Accelerated Service.

### Service Level Authorization

The Service Level Authorization section provides a link to your dealership's Service Level Authorization Scorecard. This scorecard identifies the service level tiers for which your dealership is contracted to provide service.

### Diamond Club

The Diamond Club section displays information on your dealership's participation in this recognition program. It includes your goals and a matrix in which to enter points earned in each quarter.

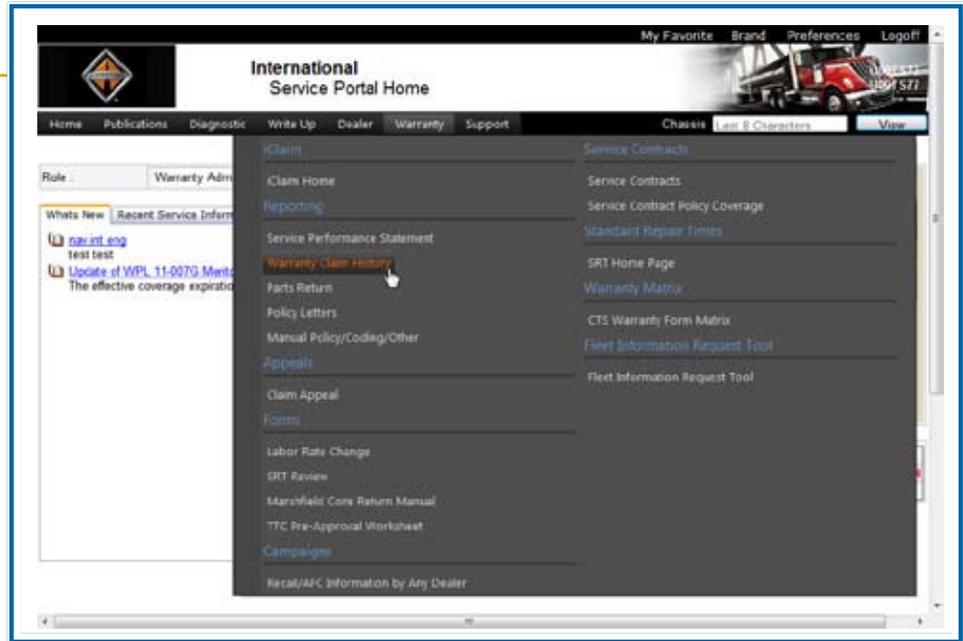
**Here you can see the sections of the Service Performance Statement for:**

1. **Parts Returns Status**
2. **Service Program Parameters**
3. **Service Level Authorization**
4. **Diamond Club**

## LESSON 3: MONITORING THE REPAIR PROCESS

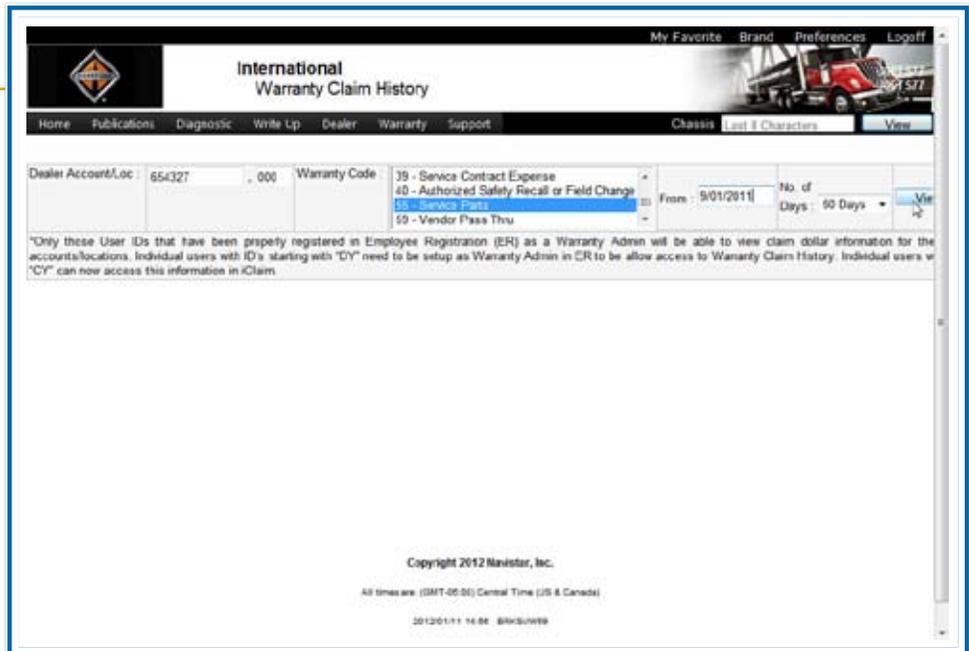
### Navigating to Warranty Claim History

You'll find the Warranty Claim History link in the Warranty menu. Hover over Warranty in the menu bar to open the menu. Then click on Warranty Claim History.

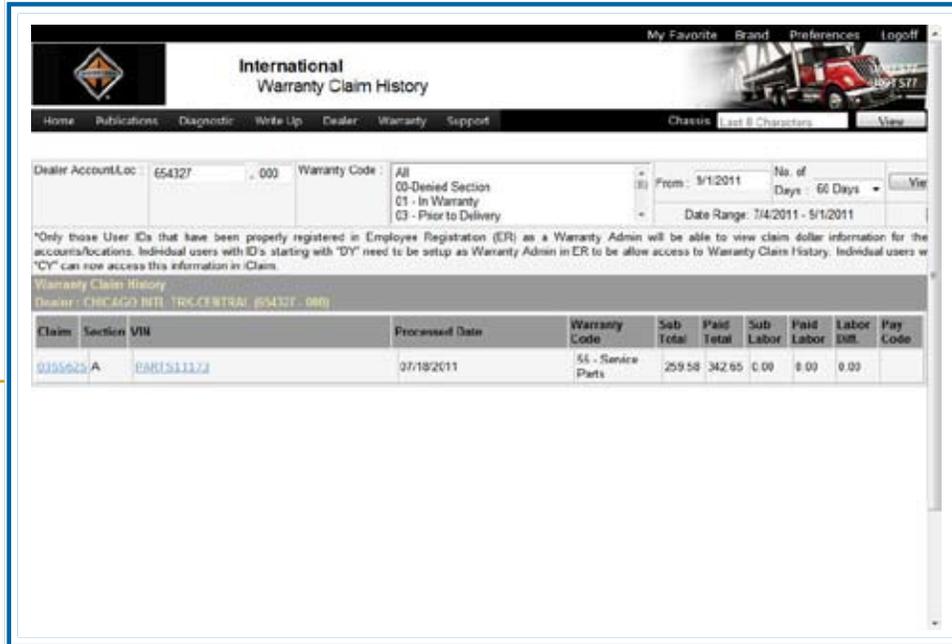


### Warranty Claim History

The Warranty Claim History allows you to view claims filed by the dealership. You must specify the dealer account number or location, select the applicable warranty code and define the timeframe. Then click on the View button.

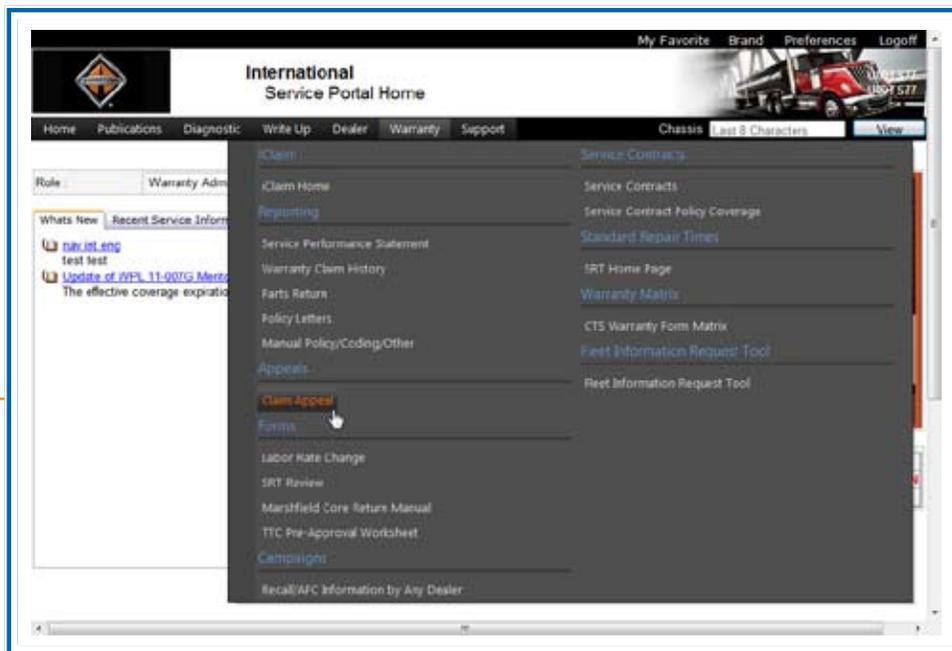


## LESSON 3: MONITORING THE REPAIR PROCESS



All warranty claims for the selected parameters are displayed.

### Navigating to Claim Appeal



You'll find the Claim Appeal link in the Warranty menu. Hover over Warranty in the menu bar to open the menu. Then click on Claim Appeal.

## LESSON 3: MONITORING THE REPAIR PROCESS

International Claim Appeal

Account: 760231 Location: 000  
 Claim: 0019283 Section: A

Submit Cancel

Copyright 2012 Navistar, Inc.  
 All times are (GMT-05:00 Central Time (US & Canada))  
 2012/01/11 14:50:00

### Claim Appeal

The Claim Appeal feature allows you to appeal the reimbursement you have received for a warranty claim. Start by entering the Dealer Account Number and Location, Claim Number and Claim Section.

International Claim Appeal Form

Claim Appeal Details

Instructions for using this screen  
 1) Fill in the Appeal Detail section under Labor Operations.  
 2) Print this page using the Print button.  
 3) Fax the printout and supporting documentation to (530) 753-5216

Supporting Documentation Examples  
 1) Technician Time Documentation (Time Punches)  
 2) Technician Write Up (Hard Card)  
 3) Any other such as diagnostic forms, Emails, faxes, tow bills or Parts Price Page.

Print Back

MIDWEST TRACHT EG., INC

Claim Detail  
 Claim: 0019283-A Processed: 12/13/2011 Dealer: 760231000 VIN: 4DRFUSKP9CB39594? Reviewer: 138

Comments  
 Claim:  
 Section: DRIVEABILITY ISSUE TURBO INTAKE TUBES LOOSE.CREATNG A.GORYTH  
 Adjustment:

Labor Operations

As Submitted

Qty	Operation	Submitted Hours	Paid Hours	Description
1.0	A12-3510A-1	0.2		CALIBRATE MAF SENSOR

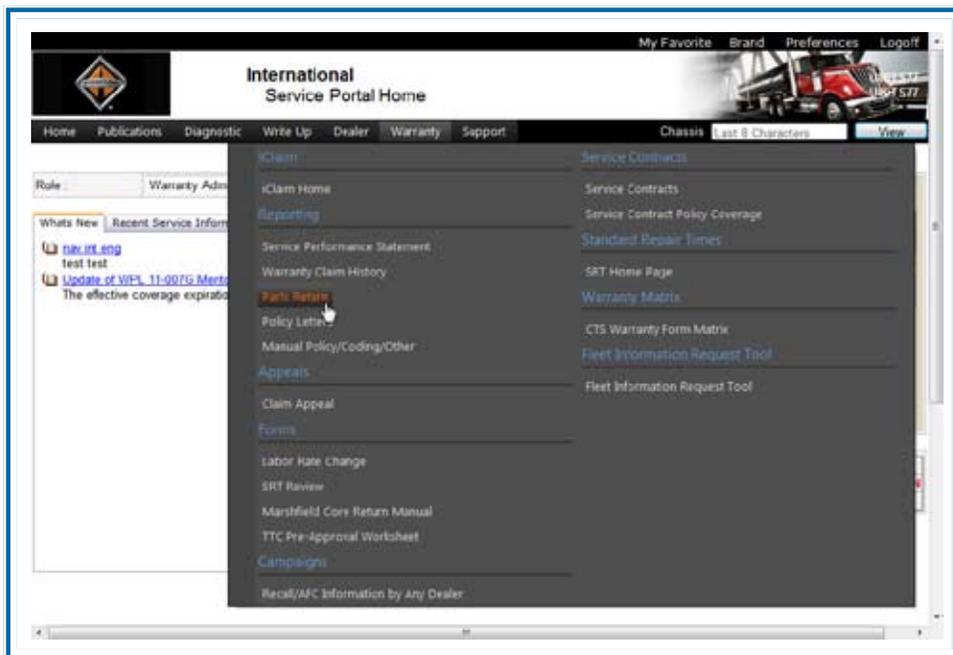
As Paid

Qty	Operation	Submitted Hours	Paid Hours	Description
-----	-----------	-----------------	------------	-------------

The resulting page displays instructions for submitting an appeal followed by a form that must be completed.

## LESSON 3: MONITORING THE REPAIR PROCESS

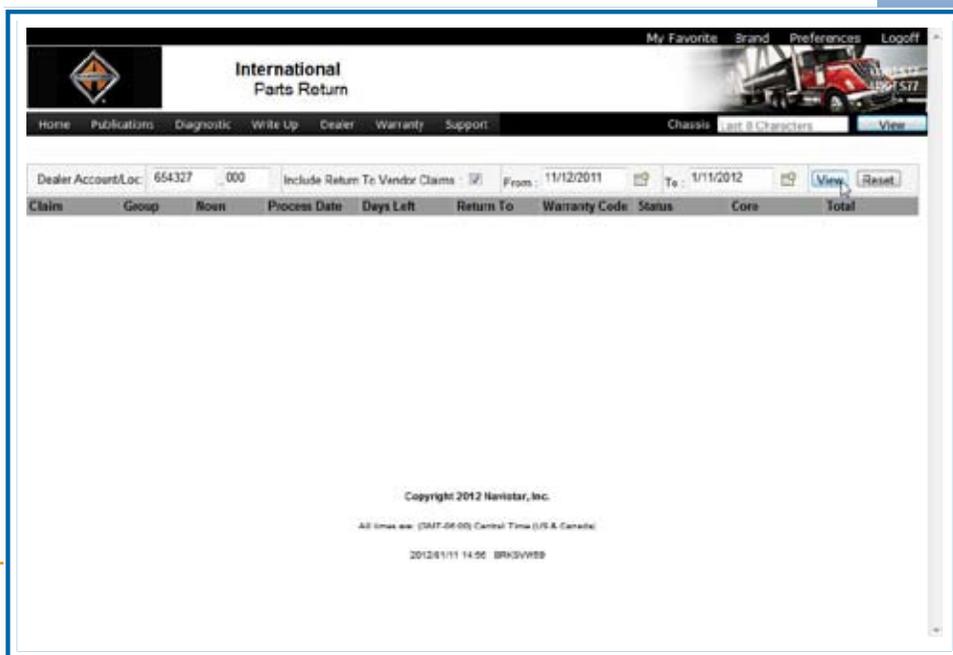
### Navigating to Parts Return



You'll find the Parts Return link in the Warranty menu. Hover over Warranty in the menu bar to open the menu. Then click on Parts Return.

### Parts Return

The Parts Return search engine allows you to determine the status of parts requested to be returned to Navistar. You specify the dealer account number and location and the timeframe in which you want the search to occur. Maximum is 60 days.



## LESSON 3: MONITORING THE REPAIR PROCESS

The result is a list of the status of all the parts requested by Navistar.

Claim	Group	Hours	Process Date	Days Left	Return To	Warranty Code	Status	Code	Total
0067716-A	12BBA	862	01/24/2012	59	Fl. Wayne	E1-h Warranty	Open		
0067718-B	12BBA	866	01/24/2012	59	Fl. Wayne	E1-h Warranty	Open		
0067727-A	12BBC	647	01/24/2012	59	Fl. Wayne	E1-h Warranty	Open		
0067777-A	12BAK	559	01/24/2012	59	Fl. Wayne	E1-h Warranty	Open		
0483582-A	13000	379	01/24/2012	59	Fl. Wayne	55-Service Parts	Open		
0484684-A	09005	022	01/24/2012	59	Fl. Wayne	55-Service Parts	Open		
0067582-A	12000	563	01/16/2012	51	Fl. Wayne	55-Service Parts	Open		
0067770-A	12BBC	089	01/19/2012	45	Fl. Wayne	E3-Prior to Delivery	Open		
0067887-A	12HUB	563	01/19/2012	45	Fl. Wayne	E1-h Warranty	Open		
0483109-A	09005	022	01/19/2012	45	Fl. Wayne	55-Service Parts	Open		
0067438-A	12BBA	866	12/30/2011	34	Fl. Wayne	E1-h Warranty	Open		
0067585-A	12BBE	171	12/30/2011	34	Fl. Wayne	E1-h Warranty	Open		
0067655-A	15040	167	12/28/2011	32	Fl. Wayne	E1-h Warranty	Open		
0067696-A	12KJC	746	12/28/2011	32	Fl. Wayne	E1-h Warranty	Open		
0067778-A	38817	663	12/28/2011	32	Fl. Wayne	E1-h Warranty	Open		
0067791-A	12HUN	453	12/28/2011	32	Fl. Wayne	E1-h Warranty	Open		
0067816-B	19106	385	12/06/2011		Fl. Wayne	E1-h Warranty	Closed		
0068582-A	12BBA	883	11/29/2011		Fl. Wayne	E1-h Warranty	Closed		
0067180-A	12HUN	892	11/29/2011		Fl. Wayne	E1-h Warranty	Closed		

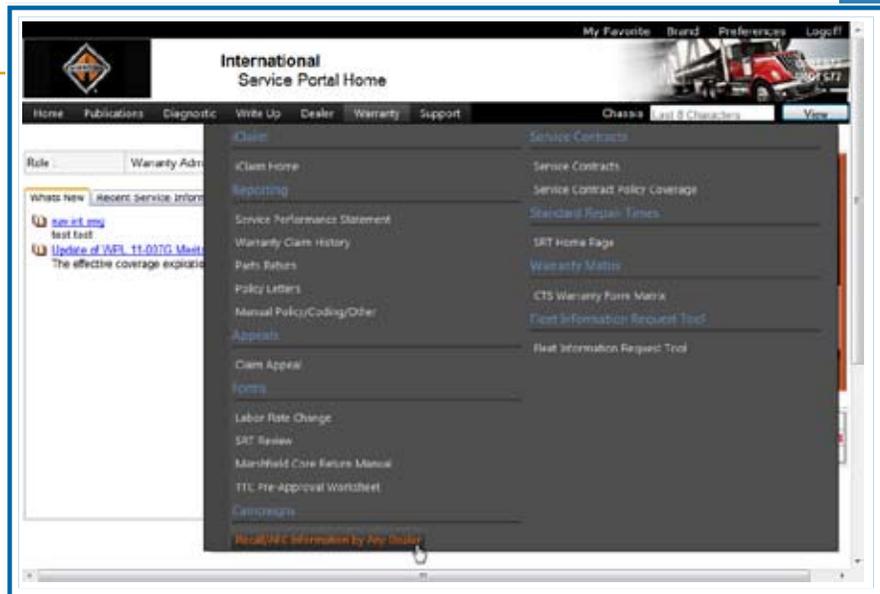
## LESSON 3: MONITORING THE REPAIR PROCESS

### Managing Warranty Campaigns

Two tools are available to help you manage warranty campaigns: Recall/AFC/MIN Summary by Dealer and the Fleet Information Request Tool.

### Navigating to Recall/AFC/MIN Summary by Dealer

You'll find the Recall/AFC/MIN Summary by Dealer link in the Warranty menu. Hover over Warranty in the menu bar to open the menu. Then click on Recall/AFC/MIN Summary by Dealer.



### Recall/AFC/MIN Summary by Dealer

From the Recall/AFC/MIN Summary by Dealer, you can access information about the progress of your dealership towards completion of each listed campaign.

Number	Description	Complete Click For Details	Incomplete Click For Details	Total Click For Details	Percent Complete
ALL	00000	20380	2288	22668	88
00001	AMTRON DRIVER SEAT MOUNTING	11	0	11	100
00001	BEENOX TRACTION CONTROL VALVE	11	0	11	100
00002	PROSLPR BUNK BOLT ISSUE	0	1	1	0
00003	LUK PWR STRG PUMP CASTING	44	2	46	96
00004	EATON AUTOSHIFT 660199 STAIT	7	0	7	100
00005	BEENOX SENSOR WIRES	1417	57	1474	96
00006	CRK & CRUISE SWITCH RE ORENT	195	7	202	97
00008	BEENOX AIR ABS - AMTRON ONLY	11	0	11	100
00009	BEENOX AIR ABS-SAP BUS ONLY	0	0	0	100
00010	BEENOX ECU STRANG-IE TRUCKS	626	21	647	97
00011	BEENOX ECU TRACTORS	201	49	250	80
00012	TRW TIE ROD ENDS	100	0	100	100
00013	TRW DRAG LINK RECALL	100	0	100	100
00009	BEENOX AIR ABS SENSOR WIRE INSPECTED	53	0	53	100
00007	SLACK ADJUSTER CHANGE	0	0	0	100

## LESSON 3: MONITORING THE REPAIR PROCESS

The listing defaults to view vehicles that you last serviced. This will include any vehicle that you've done warranty work on at your dealership location. Or you can view this information for the vehicles sold by your dealership.

You can also export the entire campaign summary matrix to Excel or export only the incomplete campaigns.

For each entry, the number in the Number column is a link to the description of the campaign, the number in the Complete column is a link to details on each vehicle that was repaired under the campaign and the number under Incomplete is a link to details on those vehicles still to be repaired.

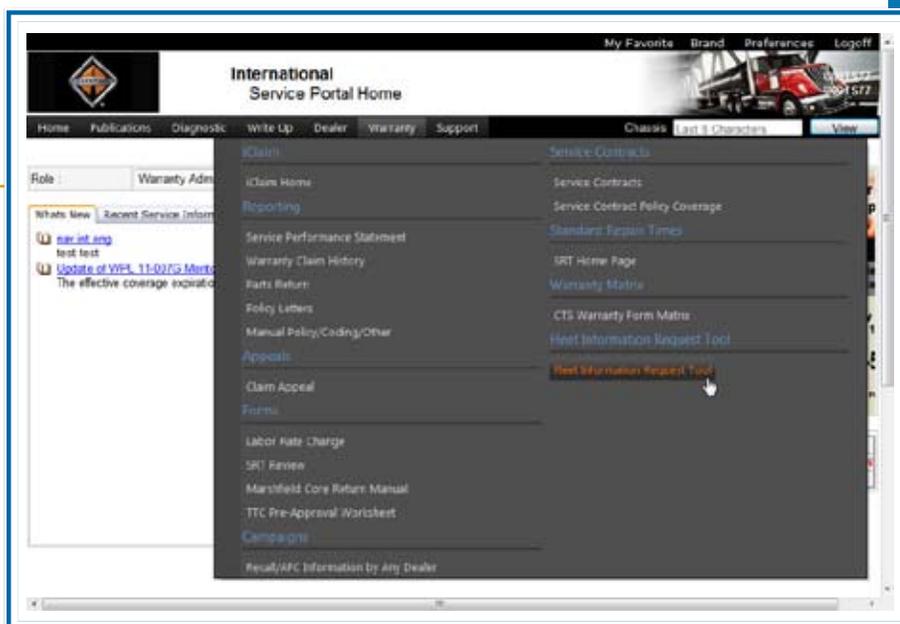
Campaign	Status	Customer	Model Description	Engine Description	Build Date
71521120	00513	T H REYAN 111 SOUTH 7TH, MAYWOOD, IL, 60153	4706 4X2	DT466 5T 199HP/199HP PEAK 2600 GOV	10/01/1999
715138540	00513	BOROUGH OF CARTERET, 28 COOKE AVE, CARTERET, NJ, 07008	4706 4X2	DT466 5T 199HP/199HP PEAK 2600 GOV	05/07/1999
710249725	00513	ARABAR ENG SVR LLC, PO BOX 3003, SULTANATE OF OMAN, 00130	4706 4X2	8T ELECT T444E D6L 175HP@23/2000RPM	06/05/1999
710255298	00513	LAKELAND GA, 122 S VALDOSTA RD, LAKELAND, GA, 31636	4706 4X2	8T ELECT T444E D6L 175HP@23/2000RPM	10/06/1999
710251300	00513	ELGIN SWEEPER CO, 1300 W GARTLETT RD, ELGIN, IL, 60120	4706 4X2	8T ELECT T444E D6L 175HP@23/2000RPM	06/05/1999
710251311	00513	DOE RIBB CO, HC 1 BOX 1595, BOSS, MO, 65440	4706 4X2	8T ELECT T444E D6L 175HP@23/2000RPM	10/06/1999

The Details listing of Incomplete vehicles for each campaign is a tool that you can use to provide additional support to your customers and generate additional business. The listing for each vehicle that has not been repaired includes a link to the Vehicle Information screen, the customer's name and address, and other basic information about the vehicle.

## LESSON 3: MONITORING THE REPAIR PROCESS

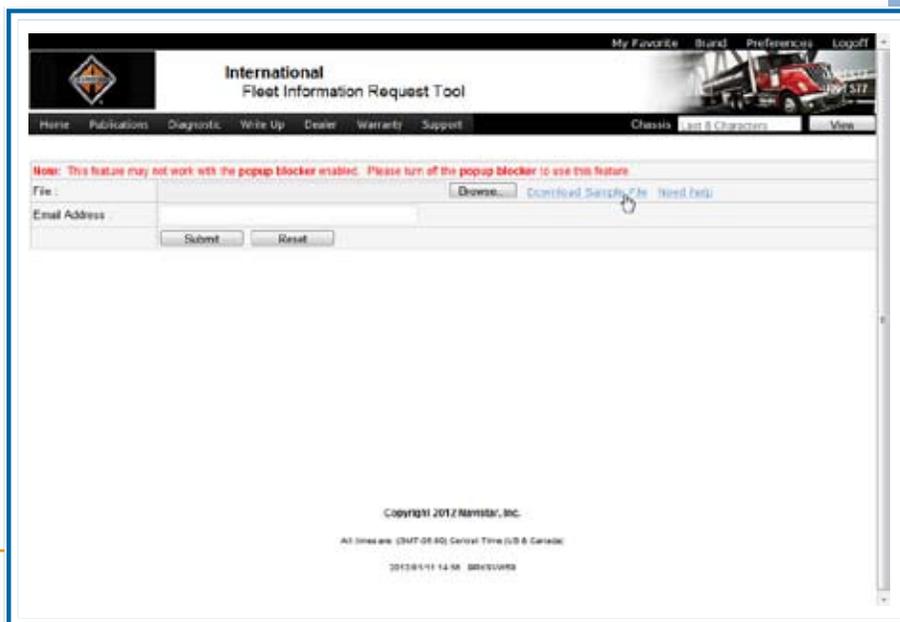
### Navigating to Fleet Information Request Tool

You'll find the Fleet Information Request Tool link in the Warranty menu. Hover over Warranty in the menu bar to open the menu. Then click on Fleet Information Request Tool.



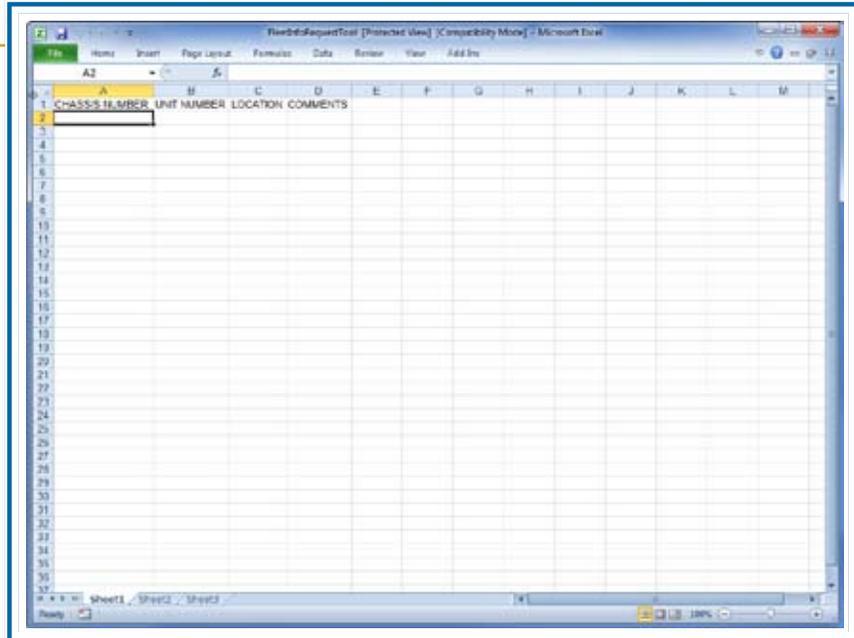
### Fleet Information Request Tool

The Fleet Information Request Tool is designed to assist customers with multiple International® vehicles in looking up critical vehicle information. To use it, begin by downloading the sample file.

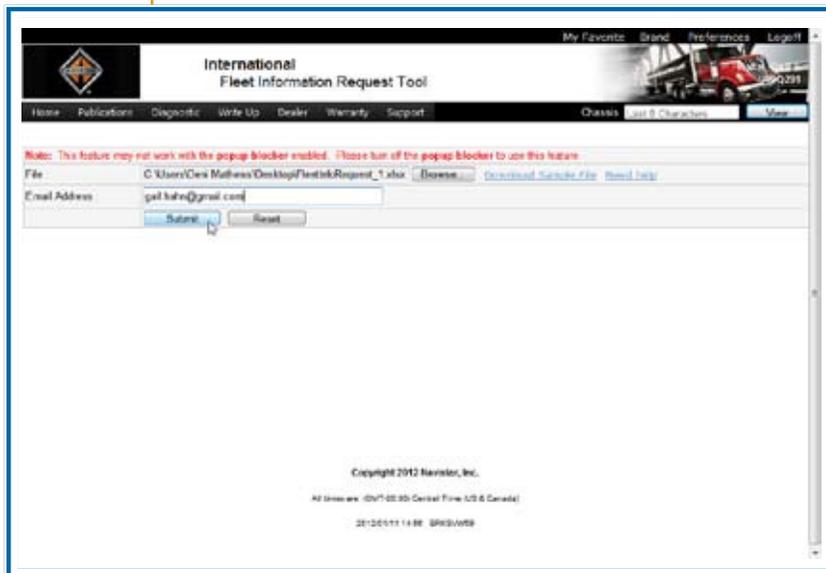


## LESSON 3: MONITORING THE REPAIR PROCESS

This is an Excel spreadsheet that documents the Chassis Numbers, Unit Numbers, Location, and Comments about any other information the requester wants back with the request. Once you have created your spreadsheet, save it on your computer.



You can then browse to find it. You must enter your email address in the Email Address field. And then click the Submit button.



Based on the chasses in this spreadsheet, this feature will return the spreadsheet with the Model, Build Date, Warranty Start Date, Engine Unit Code, Engine Make, Engine Description, detailed engine data, Wheel Base, GVWR, Paint, details about vehicle components, open AFCs and Recalls for each vehicle listed in the spreadsheet.

## **LESSON 3: MONITORING THE REPAIR PROCESS**

### **Summary**

In this program, you learned about resources that you can use to monitor the status of repairs in your dealership and administrative tasks that set up and maintain key dealership information.

#### **Monitoring Current Repairs**

The Dealer Monitor Report displays all support requests to Tech Services, parts inquiries, critical parts orders, and Repair Advocate cases. The Repair Management System provides lists of current and closed estimates for a variety of timeframes for your review. Personnel use of key resources, such as the Vehicle Information screen and Repair Management estimates, is documented in two different reports.

#### **Monitoring Warranties Repairs**

A number of resources are available to monitor your dealership's performance on warrantied repairs: the Service Performance Statement, Warranty Claim History, Claim Appeal, and Parts Return Requests.

#### **Managing Warranty Campaigns**

Two tools are available to help you manage warranty campaigns: the Recall/AFC/MIN Summary by Dealer feature and the Fleet Information Request Tool.





# Service Portal