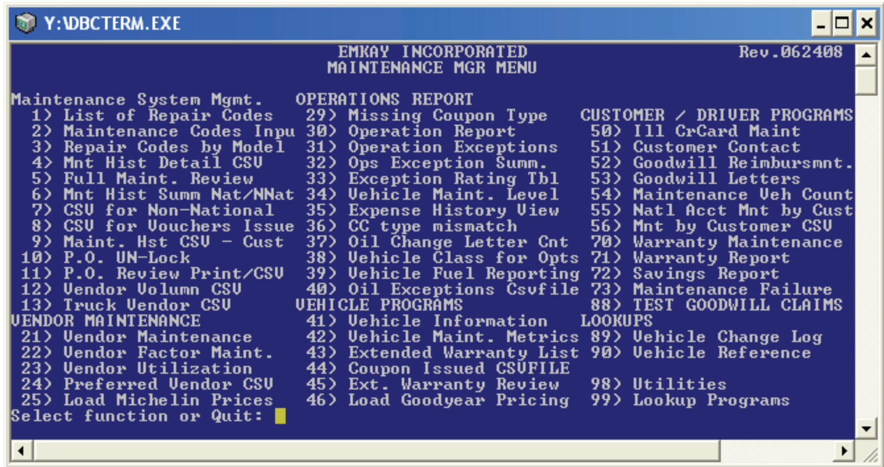
MAINTENANCE MANAGER
TRAINING MANUAL

PART 1

MAINTENANCE MANAGER TRAINING MANUAL

THE MANAGER"S MENU

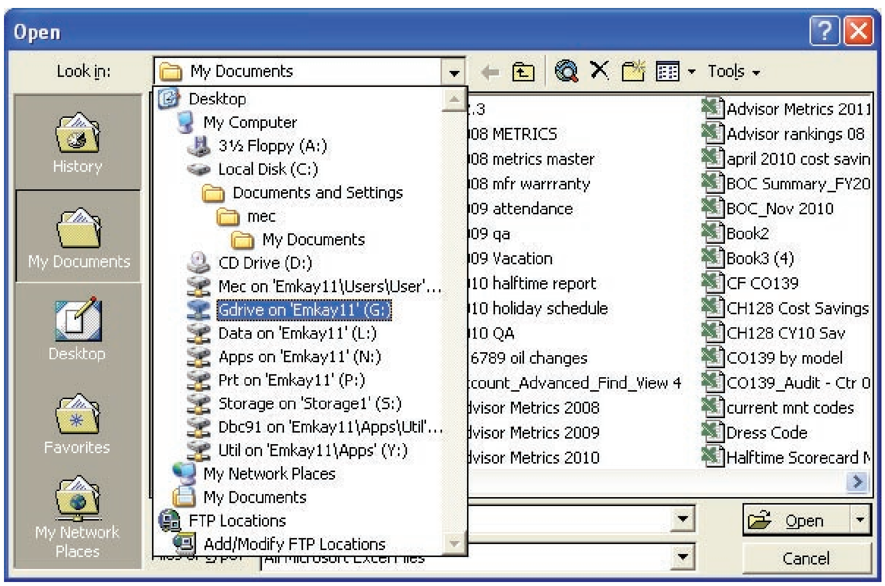
The manager's menu contains several programs to support the day-to-day operation of the maintenance department. The department manager can run reports, update maintenance repair codes, update vendor information, unlock purchase orders, and process post warranty claims through this menu.



When reports or documents are created, they are either captured on spool files or on a **CSV**. Spool files can be printed or converted to a pdf document in the utilities program. CSV files are stored in **G:\TPRT\CSV**, and are usually opened via Excel.

If you **CREATE** a CSV, the file name will appear in a note on the **DBC SCREEN**. **OPEN** an **EXCEL SESSION** and open the G:\ drive.

Some reports will always be named the same, and some will change based on the information in the report. The CSV folder is enormous and a lot of the file names are very similar, so it's a good idea to document the CSV name before moving on with the report.



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The **FIRST OPTION** on the **MANAGER MENU** is a list of repair codes. This program generates a **PRINTABLE LIST** of the different repair codes. This is a simple list that can be used for reference. No changes can be made to the list in this program, and billing details are hidden. Advisors can also access this listing through the regular **MAINTENANCE MENU**, **OPTION 12**. The spool file can be printed or converted in utilities.

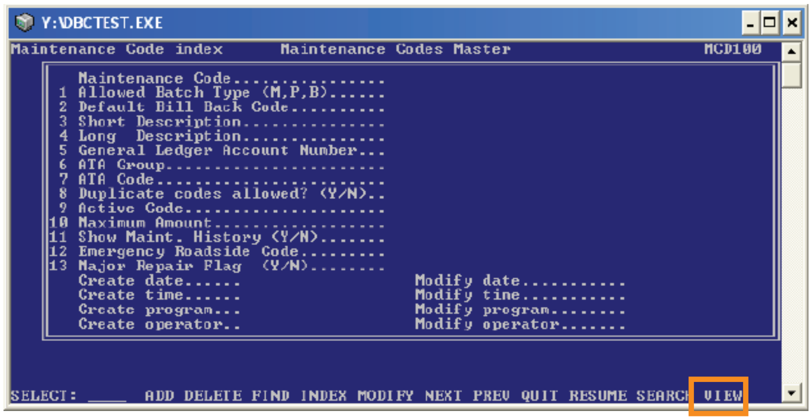
OPTION 2 is used to input and update repair codes. This is **ONLY ACCESSIBLE** to the **DEPARTMENT MANAGER**. Codes can be created, modified, activated, or deactivated with this program.

To view the **EXISTING CODES**, select "**VIEW**" from the list at the bottom of the screen. This can be done with **ARROW KEYS**, or by **TYPING THE LETTER** "**V**". Any selections from this list can be made in the same way. **HIGHLIGHT** the selection with the **ARROW KEYS** or **TYPE THE FIRST LETTER** of the selection.

SELECTING VIEW will bring up a listing of all of the **CURRENT REPAIR CODES**, both active and inactive. The listing includes our repair code, the bill back code, the description of the repair, and the maximum dollar amount for the repair.

To add a repair code, **SELECT** "**ADD**" from the bottom row. **ENTER** the **2-DIGIT CODE** you plan to use for the repair. The repair codes are loosely based on repair groups, but there are a lot of codes that deviate from the structure. Repair codes are also **CASE SENSITIVE**, so code **1A** and code **1A** can be entirely different things.

Once a code is **ENTERED**, **TYPE** "**M**" into the allowed batch type. This indicates that it's a **MAINTENANCE CODE**. The next step is to choose a **3-DIGIT BILL BACK CODE**. These codes determine what customers see on their invoices.



Code	Description
458	Miscellaneous
459	Aftermarket Accessories
460	Engine Parts/Accessories
461	Tire Services
462	Oil Services/Filters
463	Brakes/Wheels
464	Suspension/Steering/Exhaust
465	Drivetrain/Driveline
466	Electrical
467	A/C and Cooling System
468	Dash/Seats/Carpeting
469	Sales Tax
471	Tire Replacement
472	Filter Replacement
473	State/Emissions Inspection
474	Transmission
475	Preferred Vendor Discount
477	Emergency Roadside Assistance
478	Body Repairs
479	Safety Restraints/Equipment

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CHANGING BILL BACK CODES for repairs will change every listing for that repair code in every vehicle's history. If changes need to be made, it may be **BEST TO CREATE A NEW CODE**.

Once the **BILL BACK CODE** is entered, give the code both a **SHORT** and a **LONG DESCRIPTION**. Enter **GL 1015303** for maintenance billing, and the ATA group and code. Make sure flag for **FIELD 9** is **"Y"**, and enter a **MAXIMUM DOLLAR AMOUNT** if one applies. **FIELD 11** should stay **"Y"**, **FIELD 12** would be a **"Y"** if the code is a **ROADSIDE REPAIR CODE**, and the major repair flag would be **"Y"** for high dollar items like engines.

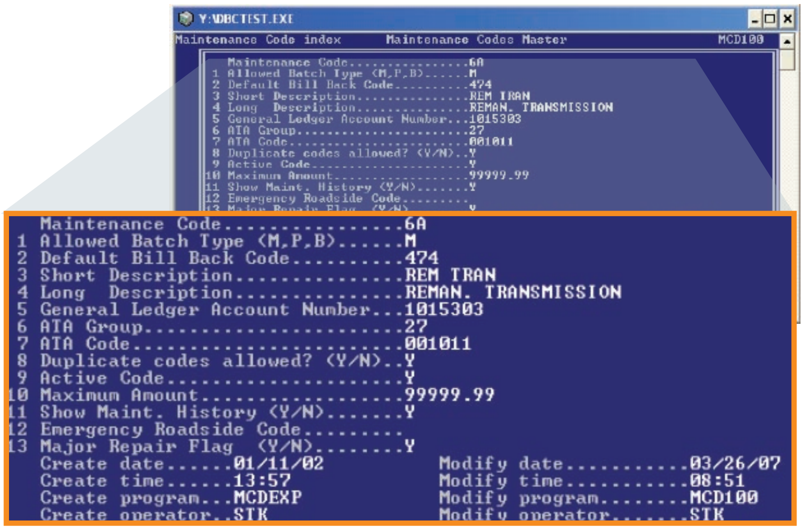
EXISTING CODES can be searched by number or by description. If modifications are needed on a repair code, **SELECT "MODIFY"** from the bottom row and make the necessary changes. Remember that any changes made to repair codes will change every listing of that repair code in every vehicle history.

OPTION 3 will **CREATE A CSV OF REPAIR CODES** by the year, make, and model of the vehicle. Vehicle makes are limited to GM, Ford, and Chrysler. The models are determined by **2-DIGIT** model codes. **ENTER** the vehicle information and the date range to search. **OPEN** the CSV as an Excel spreadsheet.

OPTION 4 CREATES A MAINTENANCE HISTORY CSV. Specify a customer number and date range, and open the CSV in Excel.

OPTION 5 is the **FULL MAINTENANCE REVIEW**. It creates a CSV with the vehicles that have recently exceeded the term of their full maintenance agreement.

OPTION 6 creates a **CSV REPORT OF A CUSTOMER'S VENDOR** usage over a specified time period. The main use for the report is tracking in-network versus out-of-network shop utilization.

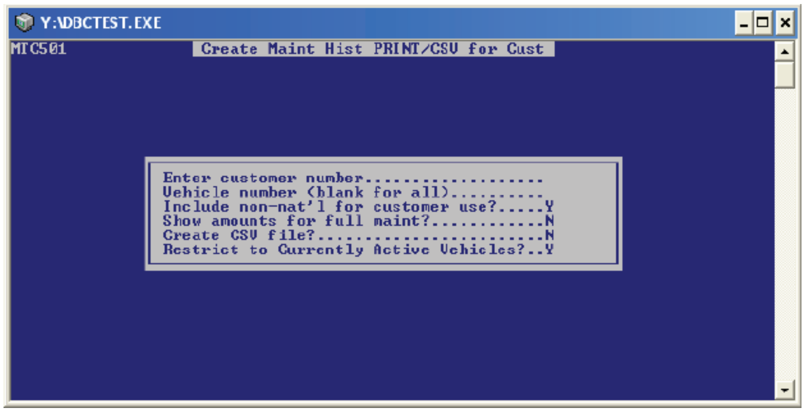


A completed repair code listing would like this:

OPTION 7 CREATES A CSV REPORT OF NON-NATIONAL account purchase orders written within a specified date range.

OPTION 8 CREATES A CSV OF ALL THE PURCHASE ORDERS created within a specified time period.

OPTION 9 CREATES EITHER A CSV OR A PDF report of the maintenance history for specific vehicles or customers. The report can cover the entire maintenance history for a customer's entire fleet, or it can cover a single vehicle for a specified time period



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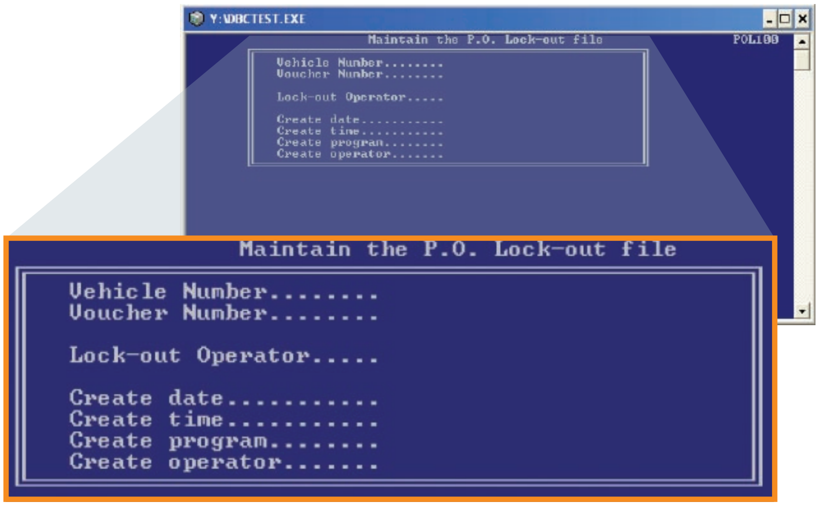
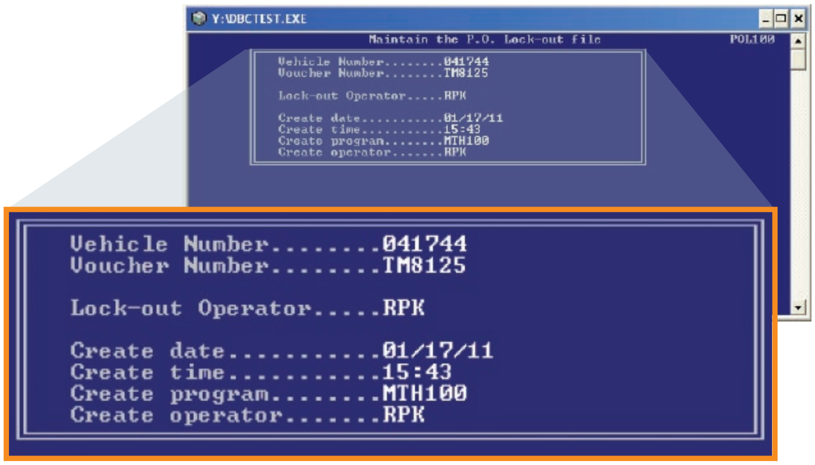
This program is also in the **MAINTENANCE MENU**, **OPTION 3**.

OPTION 10 allows the **MAINTENANCE MANAGER TO UNLOCK PURCHASE ORDERS**. If an advisor is locked in a PO for any reason, no other advisors can update it. Sometimes, the original advisor is not available, or is unable to exit the PO.



SELECT “**FIND**” from the bottom row. **ENTER** the **VEHICLE NUMBER** and the **PO NUMBER**. The record of the advisor locked in the PO will populate. **SELECT** “**DELETE**” from the bottom row. This will **RELEASE THE PO** so it can be modified.



OPTION 11 creates a **CSV OF ALL PENDING PURCHASE ORDERS.** This includes anything in the held status. Voided, open, and posted POs will not appear.

OPTION 12 creates a **CSV OF SPECIFIC NATIONAL ACCOUNT VENDOR USAGE** over a chosen time period. Choose a vendor factor number and date range. This is generally used to track the money spent for volume incentives.

OPTION 13 creates a **CSV OF TRUCK SHOPS** from the EMKAY vendor file.

OPTION 21 is **OPENS THE VNC100** from the new maintenance menu.

OPTION 22 allows the **MAINTENANCE MANAGER** to **UPDATE VENDORS** by factor number. Any changes made in this file will update every shop within a factor number, not just a single shop. **DO NOT CHANGE** anything in this file **WITHOUT THE APPROVAL OF THE DIRECTOR OF OPERATIONS**.

OPTION 23 creates a **CSV REPORT OF VENDOR UTILIZATION** over a chosen time period.

OPTION 24 creates a **CSV OF ALL OF THE PREFERRED OR NATIONAL ACCOUNT VENDORS** in both the maintenance and insurance systems.

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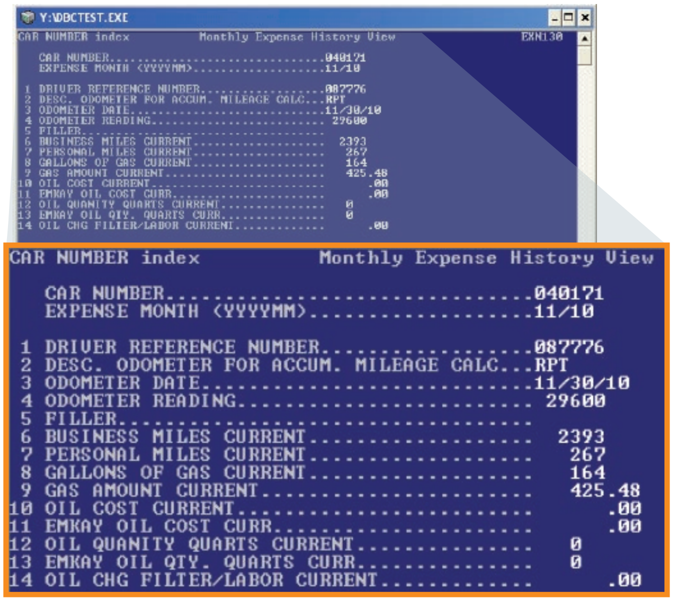
OPTION 25 loads **MICHELIN NATIONAL ACCOUNT** tire pricing.

OPTION 29 runs the **MODEL DATA FILE** and prints a listing of the vehicles that do not have a maintenance profile attached to them. The **PROFILES ARE UPDATED IN SCREEN 38**.

OPTION 30 is the **MONTHLY OPERATION REPORT**. Billing will send out an e-mail to advise the department manager that the expense file update has been completed. The operation report will update the website information. If needed, the operation report can be printed.

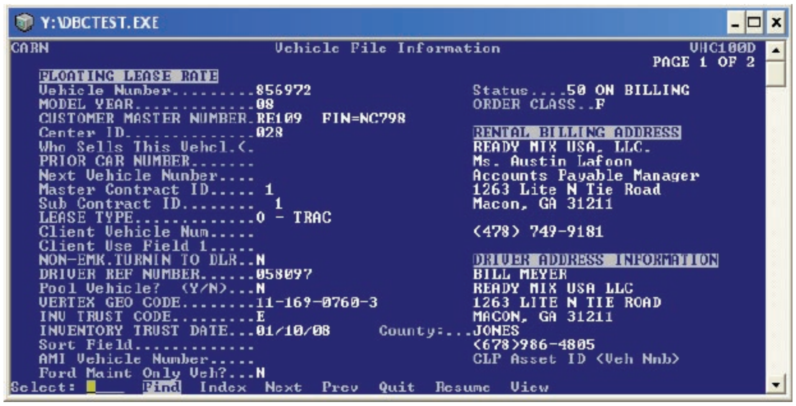
OPTION 31 is the **OPERATION EXCEPTION REPORT**. If a vehicle is behind on its maintenance, notification will be sent to the client website. Exception letters can be printed if necessary.

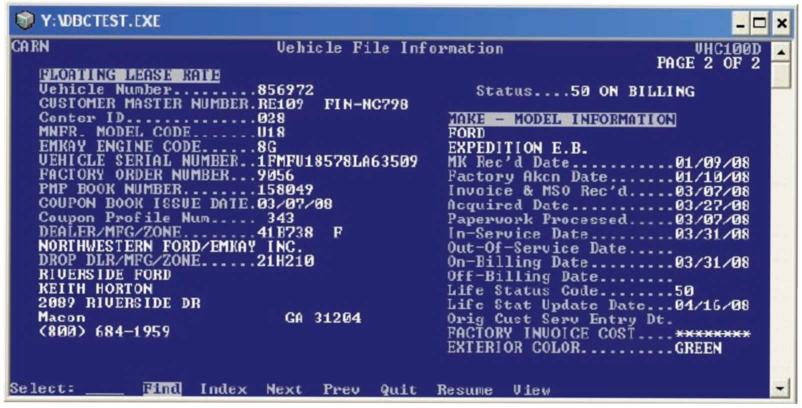
OPTION 35 provides a **VEHICLE SPECIFIC, MONTHLY EXPENSE REPORT**. It includes mileage reports, fuel, and maintenance expenses.



OPTION 38 allows the **DEPARTMENT MANAGER TO ASSIGN A PROFILE** to a specific make and model of vehicle. Vehicles that do not have profiles assigned are listed in the **MISSING COUPON TYPE REPORT IN SCREEN** 29.

OPTION 41 opens the **VNC100D** program to look up vehicle information. None of the information in this screen can be modified with this program. It is for lookup only.





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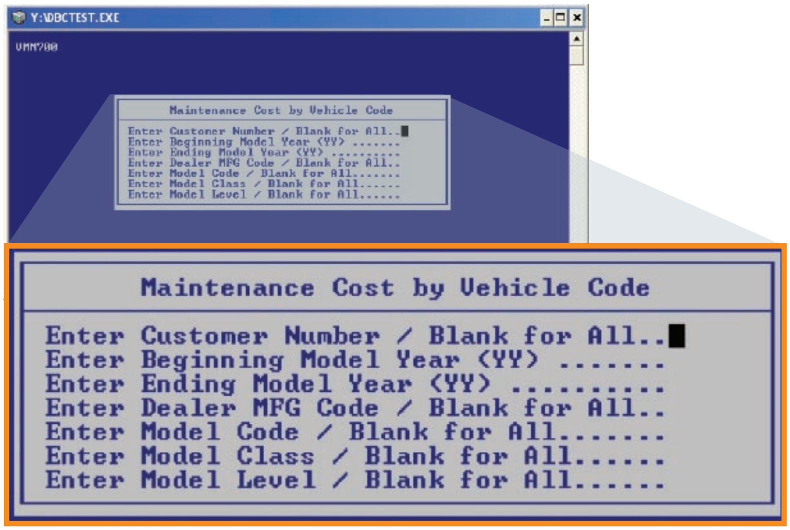
OPTION 42 opens the **VMM700 PROGRAM** to break down maintenance costs by customer and vehicle make, model, and year.



Code	Description
CC	Auto, Compact
CM	Auto, Midsize
CF	Auto, Full Size
CL	Auto, Luxury
US	SUV, Compact
UM	SUV, Midsize
UH	SUV, Full Size
UL	SUV, Luxury
TE	Equipment
PM	Passenger Minivan
PF	Passenger Van
VM	Cargo Minivan
VF	Cargo Van, Full Size
VH	Cargo Van, Heavy
TL	Truck, Light
TM	Truck, Medium Duty
TH	Truck, Heavy Duty
TT	Trailer

OPTION 44 creates a **CSV OF MAINTENANCE COUPONS** issued by customer after a specified date.

OPTION 51 opens a **lISTING OF MAINTENANCE CONTACTS** by customer number and center. This information can also be found in the **MTH100** by **PRESSING** the **F7 KEY**.

OPTION 52 creates a **REPORT OF GOODWILL REIMBURSEMENTS** by a specified date range.

OPTION 54 creates a **VEHICLE COUNT**. There is no vehicle specific information, only the number of vehicles on maintenance billing options.

OPTION 55 creates a **REPORT OF NATIONAL ACCOUNT** usage by customer over a specified date range.

OPTION 56 creates a **REPORT OF THE TOTAL AMOUNTS** of national account, non-national account, and preferred vendor transactions for a specified time period.

OPTION 70 opens the **MTT100 PROGRAM** to look up **GOODWILL CLAIMS**. Claims can only be edited by the Director of Maintenance.

OPTION 71 creates a **REPORT OF GOODWILL ADJUSTMENTS** that can be filtered by customer number, submission status, or payment status.

OPTION 72 creates a **REPORT OF ALL THE COST CONTAINMENTS RECORDED** over a specified date range. The report is the basis for monthly and quarterly metrics and can be run for specific customers as needed.

OPTION 73 creates a **CSV OF MAJOR REPAIRS OVER** a specified date range.

NOTES