EMKAY

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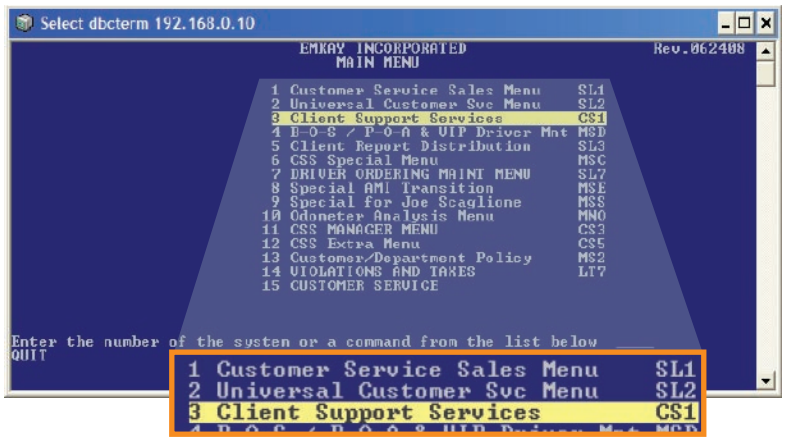
CUSTOMER MAINTENANCE
TRAINING GUIDE

CUSTOMER MAINTENANCE TRAINING GUIDE (PROGRAM CMC100VA)

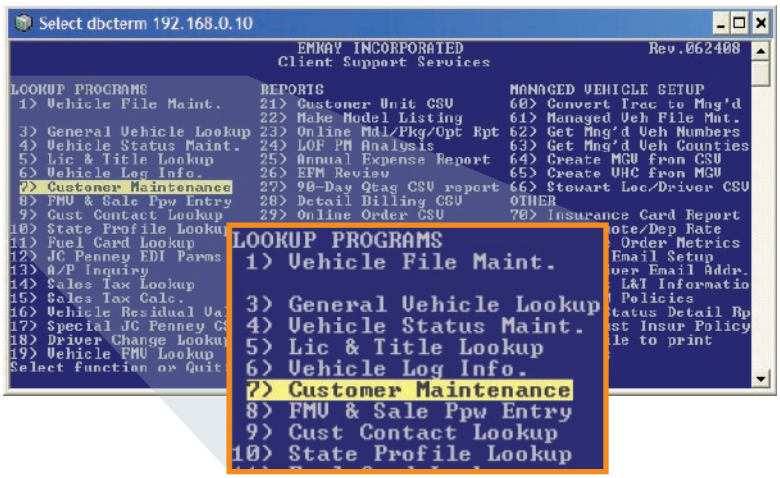
WHERE:
CS1-Client Support Services
(Menu option 7) Customer Maintenance

WHAT:
Account Details, Start Dates, Assigned Sales Person, Assigned Customer Service Team, Fleet Potential, Manufacturer Fleet ID's, Federal ID's, Tax Exempt Status, Factory Order Discounts, Courtesy Delivery Fees, Contracts, Subcontracts and Options, Depreciation Rates.

1. From Linux, access the **CLIENT SUPPORT SERVICES – CS1 SUBMENU**. It is item 3 on the screen below. The item number may vary on your version of Linux, but the name and number of the submenu will be the same for everyone. To access the menu type the item number as it appears on your screen and press **<ENTER>**.



2. You will now be viewing the **CLIENT SUPPORT SERVICES SUBMENU**. From this screen, access the **CUSTOMER MAINTENANCE** program. It is item 7 on the screen below and will be so for all users. To access the program type the program number, 7, and press **<ENTER>**.



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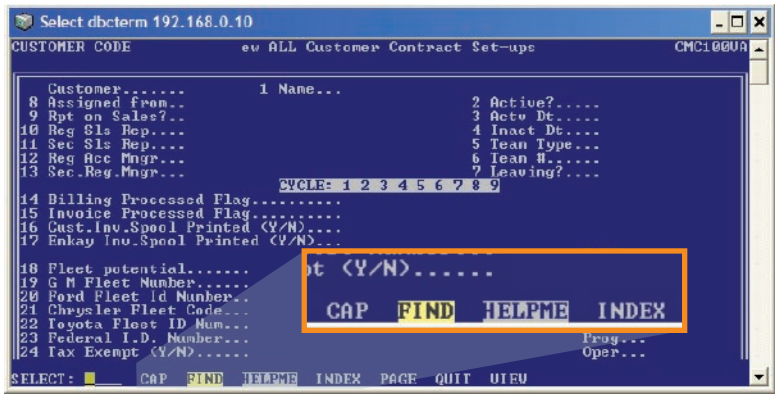
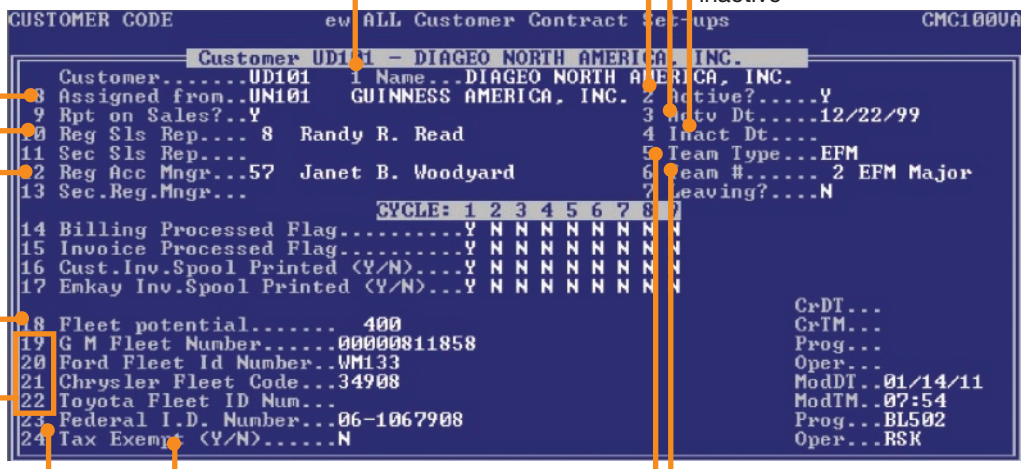
3 You will now be viewing the **CUSTOMER MAINTENANCE**, program CMC100VA, main screen. From this screen we will need to choose a customer. From the menu at the bottom of the screen, **ARROW OVER** to, or press **<F>** for the Find option and press **<ENTER>**.



4 **TYPE** the **CUSTOMER NUMBER** you wish to view information for. In this example we are using **UD101**, the customer number for **DIAGEO NORTH AMERICA, INC.** This home page tells us quite a bit about the account. Reading from the top down it tells us:



(1) Customer Name

(2) If it is an active customer

(3) The dates it was made active

(4) The dates it was made inactive

(5 and 6) Assigned customer service team

(8) If it was assigned from a previous customer

(10) It also tells us the original sales person for the account

(12) The current account manger

(18) In the bottom section you can see the fleet potential

(19 - 22) Manufacturer fleet ID number for this customer

(23) Federal ID number

(24) Tax exempt status

This page is also the launch point for many other useful pieces of information about the client. We will start with the **CAPITALIZATION MAINTENANCE** information. **ARROW OVER** to, or press **<C>** for the Cap option and press **<ENTER>**.

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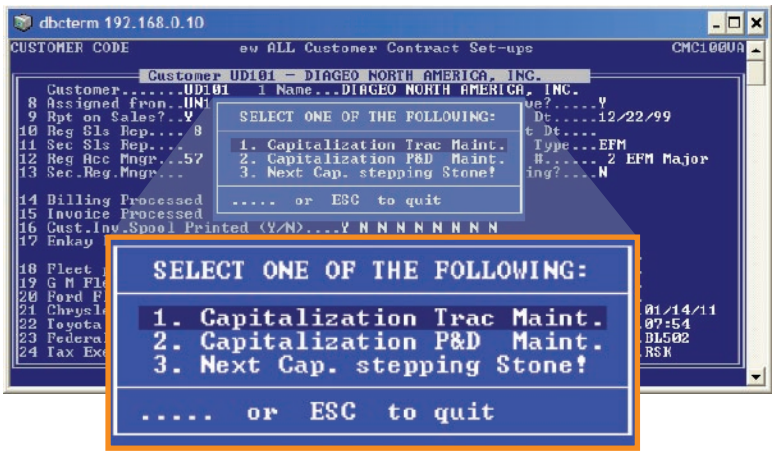
5 A box will pop up. **TRAC MAINT** is for open ended leases, **P&D MAINT** is for client purchase and disposal units, the **NEXT CAP STEPPING STONE** option is not currently used. For this example we will select the 1. **CAPITALIZATION TRAC MAIN**t option. **ARROW DOWN** to, or type the number of the option you wish to view and press **<ENTER>**.



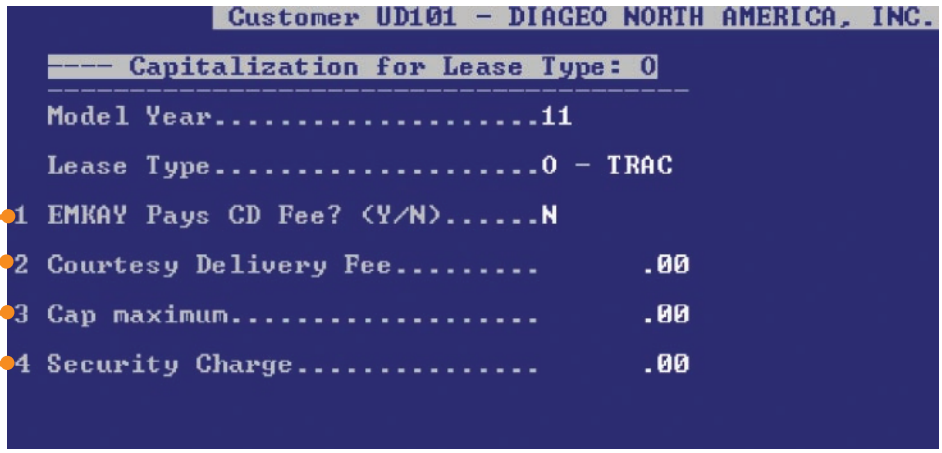
6 You will now be viewing the Capitalization Maintenance screen. This screen will tell us:

(1) If Emkay pays the courtesy delivery fee for this customer

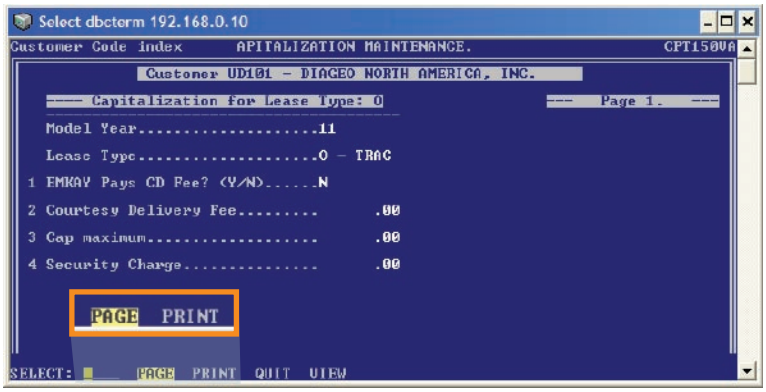
(2) If so, how much we pay

(3) And if there is a cap maximum

(4) Security charge



The last two items are seldom used. **ARROW OVER** to, or press **<+>** or **<P>** once for the Page option and press **<ENTER>**.



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7

You will now be viewing the EMKAY order incentives for this client. The various manufacturers for which EMKAY offers incentives are listed on the left. O-type, is short for Order Type and will be either Factory or Stock Order. Markup is typically the incentive offered. As you can see blow the amounts under the markup column are all negative dollar amounts, to be subtracted from the total cost of the vehicle. In rare cases clients have a percentage that will be taken off instead of a fixed dollar amount. Also in some rare cases, the amount or percentage will be a positive number which is truly a markup to be added to the total cost of the vehicle. Make sure you read carefully.

On the list of manufacturers you see Std. Domestic Cars. This line represents vehicles from Ford, Dodge/Chrysler, and Chevrolet/GM.

You may also see the line for Fact Invoice Less Then $$. This line represents the incentive offered when the Factory invoice is less than the amount noted in the Less-Then column. In our example the incentive offered if the factory invoice is less than $18500 is $750, instead of the $900 it would have been for a vehicle over $18500.

Press **<ESC>** once to return to the **CUSTOMER MAINTENANCE** program main screen.

dbcterm 192.168.0.10

Customer Code index APITALIZATION MAINTENANCE. CPT150VA

	TYP	DESCRIPTION	LESS-THEN	O-TYP	%	-MARKUP- $$	DealrFee
1	S	Std.Domestic Cars	.00	Fact Ord	.00	-900.00	.00
2	I	Fact Inv Less then $$	18500.00	Fact Ord	.00	-750.00	.00
3	B	Out of Stock	.00	Stk Ords	.00	.00	.00
4	P	Cadillac	.00	Fact Ord	.00	-450.00	.00
5	O	Lincoln	.00	Fact Ord	.00	-450.00	.00
6	Y	AUDI	.00	Fact Ord	.00	-450.00	.00
7	M	Mazda	.00	Fact Ord	.00	-450.00	.00
8	W	Mercedes Benz	.00	Fact Ord	.00	.00	.00
9	N	Nissan	.00	Fact Ord	.00	-650.00	.00
10	G	SAAB	.00	Fact Ord	.00	-450.00	.00
11	K	Subaru	.00	Fact Ord	.00	-450.00	.00
12	T	Toyota	.00	Fact Ord	.00	-450.00	.00
13	V	Volvo	.00	Fact Ord	.00	-450.00	.00
14	Z	VW	.00	Fact Ord	.00	-450.00	.00
15	D	Client Located	.00	Stk Ords	.00	.00	.00
16							
17							
18							
19							
20							

SELECT: ____ PAGE PRINT QUIT VIEW

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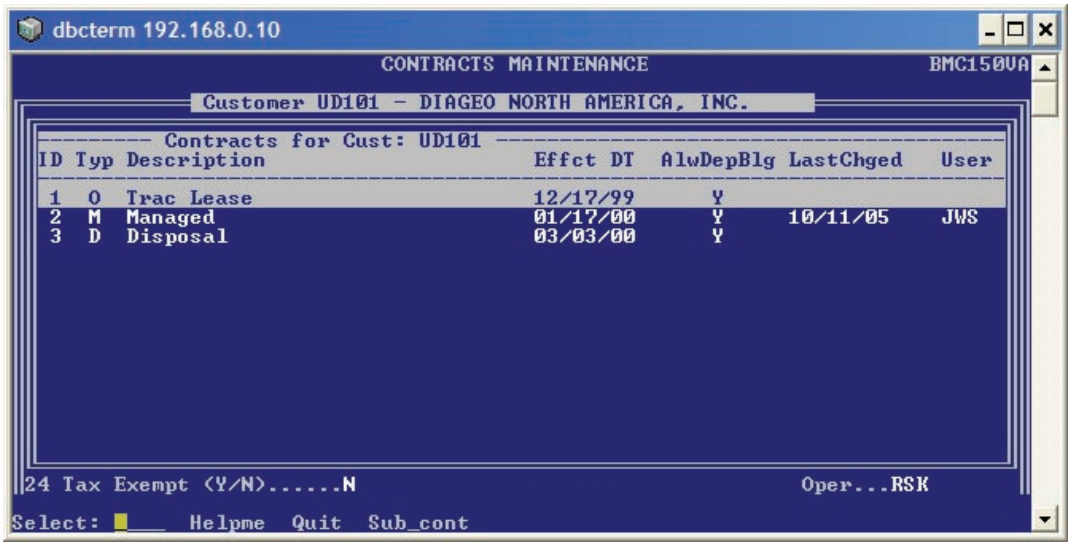
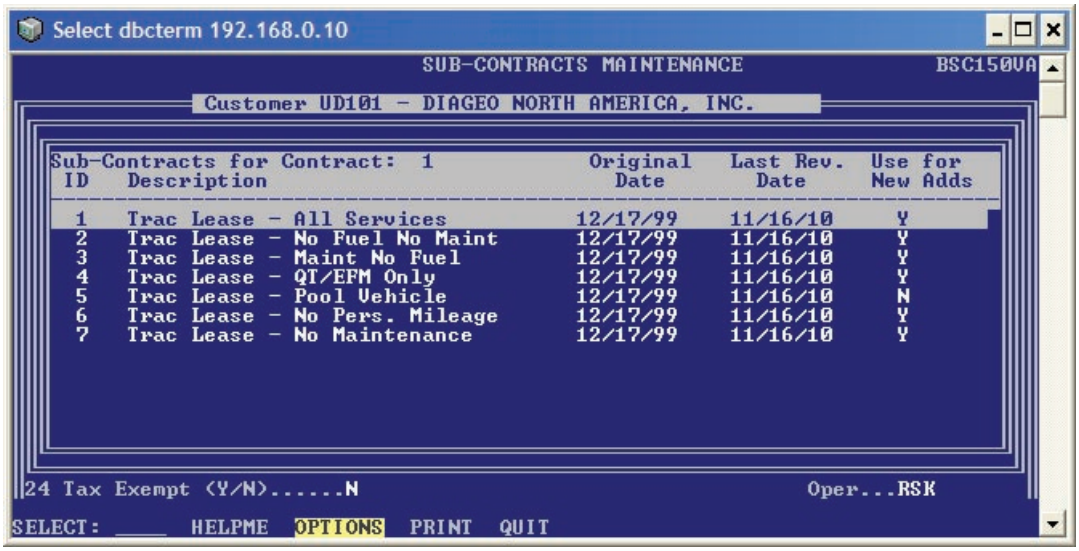
8 From the main screen, or any screen within the Customer Maintenance program you can press **<F8>** to access the Contract Maintenance screen. This screen will show the various contract types available to your selected customer. Each contract is numbered. The ID number will appear in Linux and on inventory reports to identify the contract assigned to each vehicle. To view the subcontracts available under each contract type, **ARROW DOWN** to the contract you wish to view, and then **ARROW OVER** to, or press **<S>** for the Sub_cont option and press **<ENTER>**.



9 You will now see a list of the subcontracts available under your selected contract type. Each subcontract is numbered. The ID number will appear in Linux and on inventory reports to identify the subcontract assigned to each vehicle. To view the service options available under each subcontract, **ARROW DOWN** to the subcontract you wish to view, and then **ARROW OVER** to, or press **<O>** for Options and press **<ENTER>**.



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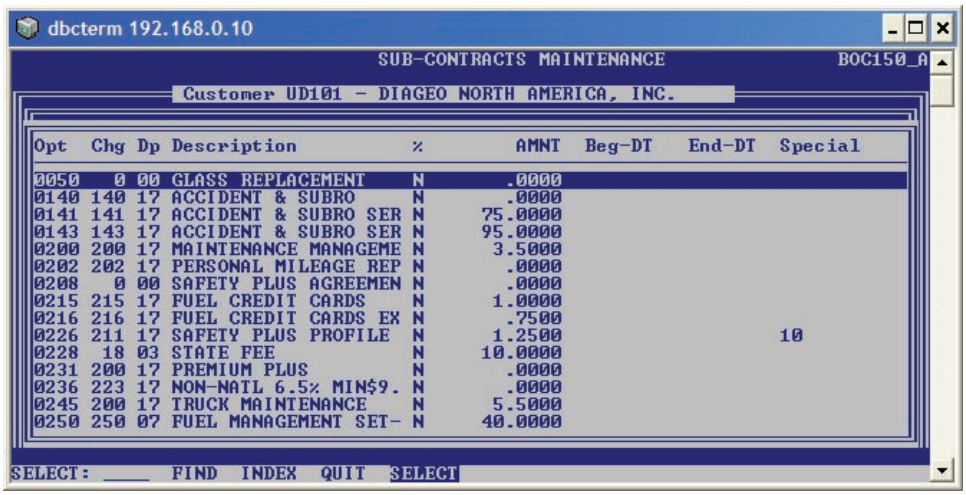
10 You will now see the options under your selected subcontract **ID**. This screen can be read left to right. **OPT** is the billing option code as defined by EMKAY's billing department. **CHG** is the charge code that the operating and billing departments use to process invoices. **DP** is the department that this item ties to. Description, as you would expect, describes what each option is. **AMNT** is the amount that is billed monthly, or at the time of each service. In this example, this client is billed a $3.50 per month charge for Maintenance Management, and a $75 fee per each accident claim. Typically, service charge are billed monthly and fees are only billed as they are used. Begin date and End-Date show when an option was added to a subcontract or when it was removed. If an option has been removed it will show in yellow and will no longer be active under that subcontract.

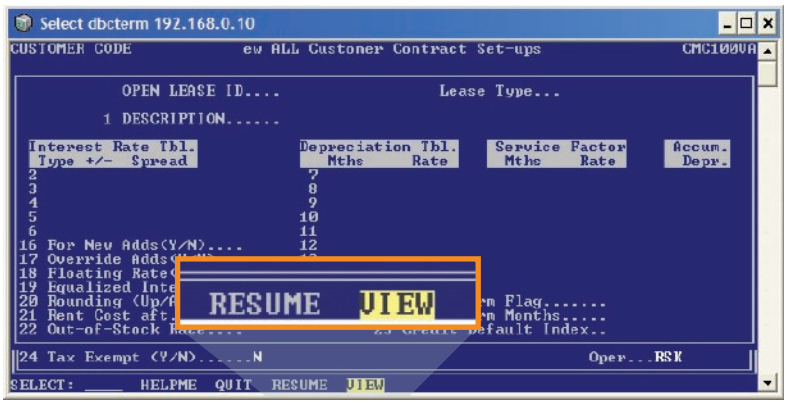
Press **<ESC> ONCE** to return to the Subcontract screen.

Press **<ESC> AGAIN** to return to the Contract screen.

Press **<ESC> AGAIN** to return to the Customer Maintenance program main screen.



11 From the main screen, or any screen within the Customer Maintenance program you can press **<F12>** to access the **DEPRECIATION RATE** screen. To view a listing of depreciation rates from this screen, press **<V>** for **VIEW** and press **<ENTER>**.



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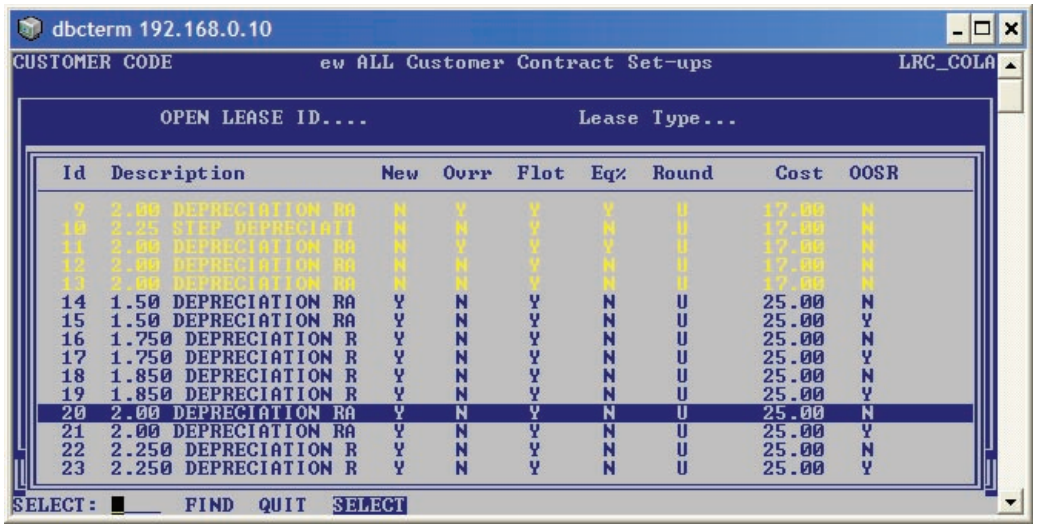
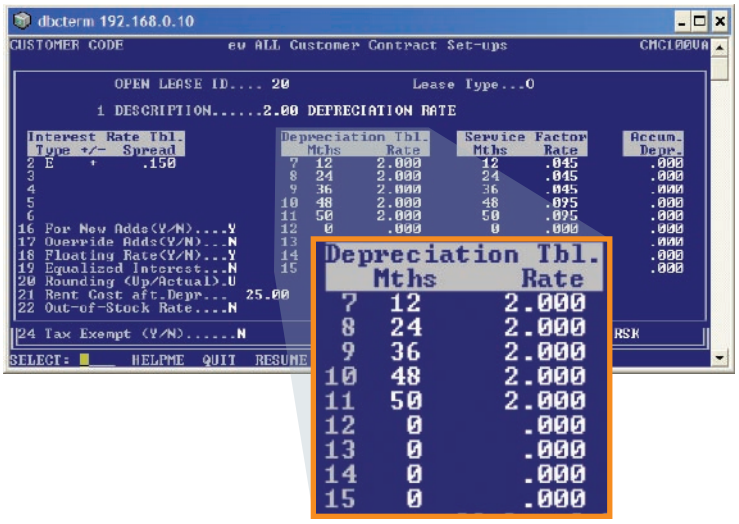
12 You will now have a list of all of the depreciation rates available in the system for your selected customer. **RATES IN YELLOW** are no longer active for new vehicles. **RATES IN BLUE** are able to be used for new orders. Each rate is assigned an ID number. The ID number will appear in Linux and on inventory reports to identify the depreciation rate assigned to each Trac lease vehicle. Cost will show what the rental charge for the selected client is without interest and depreciation. **OOSR** will show **N** for factory orders, and **Y** for Out of Stock orders. **ARROW DOWN** to, or type the **ID NUMBER** of the rate you wish to **VIEW** and press **<ENTER>**.



Id	Description	New	Ovrr	Flot	Eq%	Round	Cost	OOSR
9	2.00 DEPRECIATION RA	N	Y	Y	Y	U	17.00	N
10	2.25 STEP DEPRECIATI	N	N	Y	N	U	17.00	N
11	2.00 DEPRECIATION RA	N	Y	Y	Y	U	17.00	N
12	2.00 DEPRECIATION RA	N	N	Y	N	U	17.00	N
13	2.00 DEPRECIATION RA	N	N	Y	N	U	17.00	N
14	1.50 DEPRECIATION RA	Y	N	Y	N	U	25.00	N
15	1.50 DEPRECIATION RA	Y	N	Y	N	U	25.00	Y
16	1.750 DEPRECIATION R	Y	N	Y	N	U	25.00	N
17	1.750 DEPRECIATION R	Y	N	Y	N	U	25.00	Y
18	1.850 DEPRECIATION R	Y	N	Y	N	U	25.00	N
19	1.850 DEPRECIATION R	Y	N	Y	N	U	25.00	Y
20	2.00 DEPRECIATION RA	Y	N	Y	N	U	25.00	N
21	2.00 DEPRECIATION RA	Y	N	Y	N	U	25.00	Y
22	2.250 DEPRECIATION R	Y	N	Y	N	U	25.00	N
23	2.250 DEPRECIATION R	Y	N	Y	N	U	25.00	Y

13 You will now be in detail screen for that depreciation rate. Within this screen you can see the **INTEREST TYPE USED** and along with the adder for that interest rate type (2). You will also see the Depreciation Table that shows how many months until the rate reaches $0 in remaining book value, along with the depreciation rate for each month. If it is a step depreciation the rate will change as often as every 12 months. You will also see the service factors that are charged as part of the monthly rental. (7-15).



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