MAINTENANCE DEPARTMENT
TRAINING MANUAL

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Overview- The EMKAY Maintenance Management Program is the most effective method of controlling fleet operating expenses. Our program allows clients to take advantage of our experience and knowledge to minimize unnecessary and fraudulent repairs, our relationships with the manufacturers to recover money through goodwill and post warranty coverage, and our relationships with our in-network shops to provide the best pricing possible. EMKAY'S programs give clients the ability to track their expenses and review historical data, as well as providing customized reports on maintenance compliance and expenses.

As a member of the EMKAY Maintenance Team, you will be on the front lines of this process. EMKAY'S Maintenance Advisors are in direct contact with drivers, service providers, and fleet administrators to guide the repair process and ensure that the correct repairs are done in the most cost effective and expedient manner possible.

Getting Started- To access EMKAY'S dbc system, select it from your desktop icons. A login screen will appear. Make sure caps lock is on and type in your EMKAY user name. Your user name is usually your initials (first, middle, last). If caps lock is not on, the dbc will not accept your login.

Navigation in the dbc system is done by keystrokes. The mouse does not work on any dbc programs. To move forward, hit enter. To move back, hit esc. You can also navigate by using the arrow keys or page up and page down. Keep caps lock on, as the system does not recognize lower case letters.

Once you are logged in, the system will automatically go to the main menu screen, pictured below. There are different menu options, based on the user's job, so you may not have all the options shown on this screen shot.
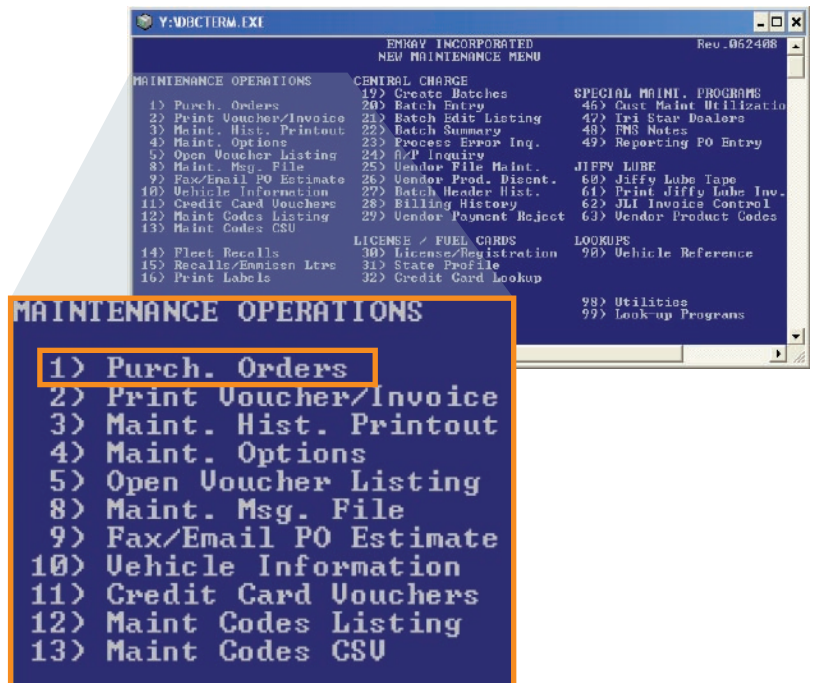
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Most of the work you will be doing will be under **OPTION 1**, the **NEW MAINTENANCE MENU**. Other options will give you access to general lookups, reports, and electronic billing.

From the New Maintenance Menu, you can access the purchase order screen, run vehicle history reports, create vehicle specific messages, send out estimates, process recalls, and access vendor, A/P, and billing programs.
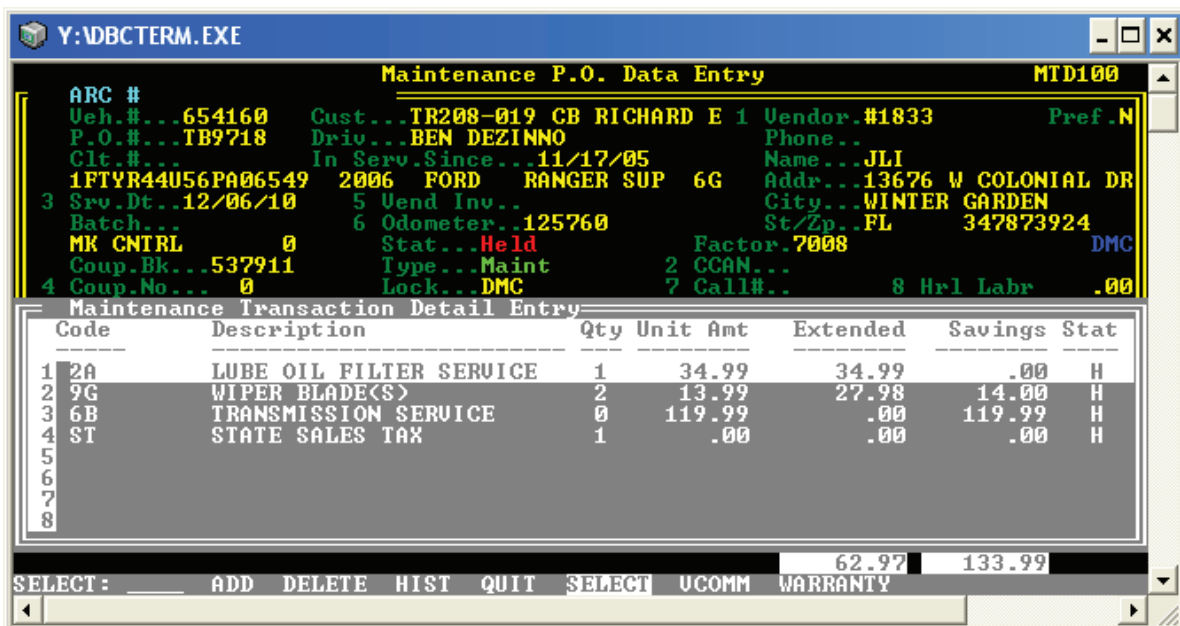
CREATING A PURCHASE ORDER- **SELECT OPTION 1** from the new maintenance menu to find or create a purchase order. This will bring you to the PO data entry screen. **SELECT** "**ADD**" from the options at the bottom of the screen by **TYPING** "**A**" or with the **ARROW KEYS**.

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SELECTING "**ADD**" allows you to **ADD A PURCHASE ORDER**. You can search for the vehicle by EMKAY vehicle number, VIN, the customer's vehicle number, driver name, coupon book number, license plate number, or by company name.

We generally use the **LAST SIX OR EIGHT DIGITS OF THE VIN**, as this is usually the most accurate method and allows for the least amount of interpretation. Once the vehicle has been identified, **TYPE** the **SHOP'S PHONE NUMBER** into the "**VENDOR**" field. If we have worked with the shop before, their information should automatically populate the appropriate fields. If the date of service is different from today's date, enter that. If the date is work is being done today, **ENTER** past the date. **ENTER** the **MILEAGE**. If the call is for a tow or roadside service, **ENTER** "**N**" in the "**CALL#**" field. Press **<ENTER>** again to access the detail screen for the PO.

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TWO DIGIT REPAIR CODE

AUTOMATICALLY DESCRIPTION OF SERVICE

QUANTITY AND PRICE
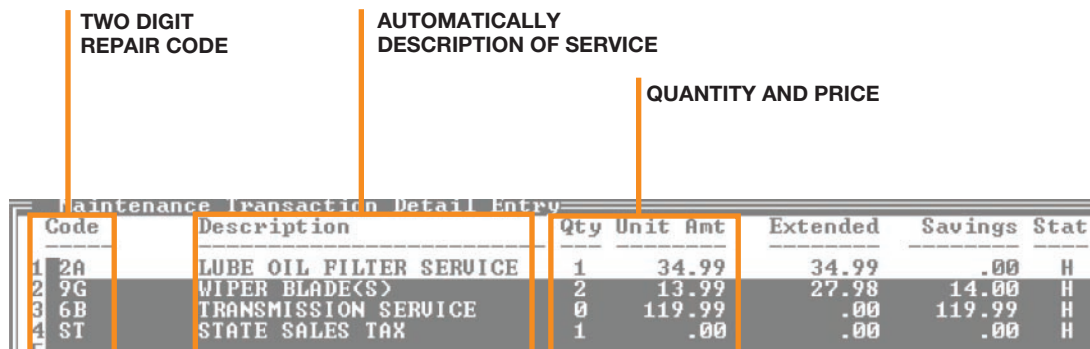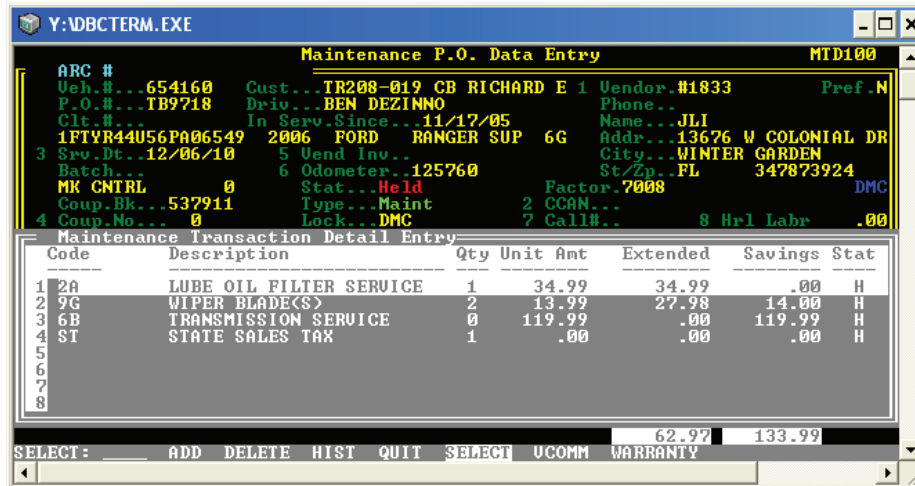
Details are entered by **TWO DIGIT REPAIR CODES**. The codes will automatically populate the description field with what service is being done. For example: in the PO shown, the **2A CODE** shows a description of "**LUBE OIL FILTER SERVICE**".

2A is the code we use for oil changes. If the description for a given code is not specific or detailed enough, it is possible to **OVER-WRITE** the description. **ENTER** the **QUANTITY** and the **PRICE**, and you can move on to the next line. If you don't know the code for a specific repair, **TYPE A "?"** into the field for the code and you can look it up by description. If nothing matches the description, use a miscellaneous code and type in the description.

It is important to remember that we don't use our own repair codes on Goodyear and Firestone national account POs. We use Goodyear product codes and Firestone article numbers on their purchase orders. We also use Michelin MSPNs for their tires. The shop should be able to supply you with product codes, article numbers, or MSPNs for the necessary repairs. If not, **TYPE A "?"** into the repair code field and find the listing.

It is important to check customer policies and procedures before authorizing repairs. Some clients are very specific about what kind of services can be done, dollar limits, national account utilization, and mileage limits. Customer policies can be found by pressing "**F8**".

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SELECT "**VEHICLE DETAIL**" from the options at the bottom of the screen by **TYPING** "**V**" or with the **ARROW KEYS**.

The maintenance department will automatically be highlighted. Press **<ENTER>**. This will take you to the **FMS NOTES FOR THE VEHICLE**.
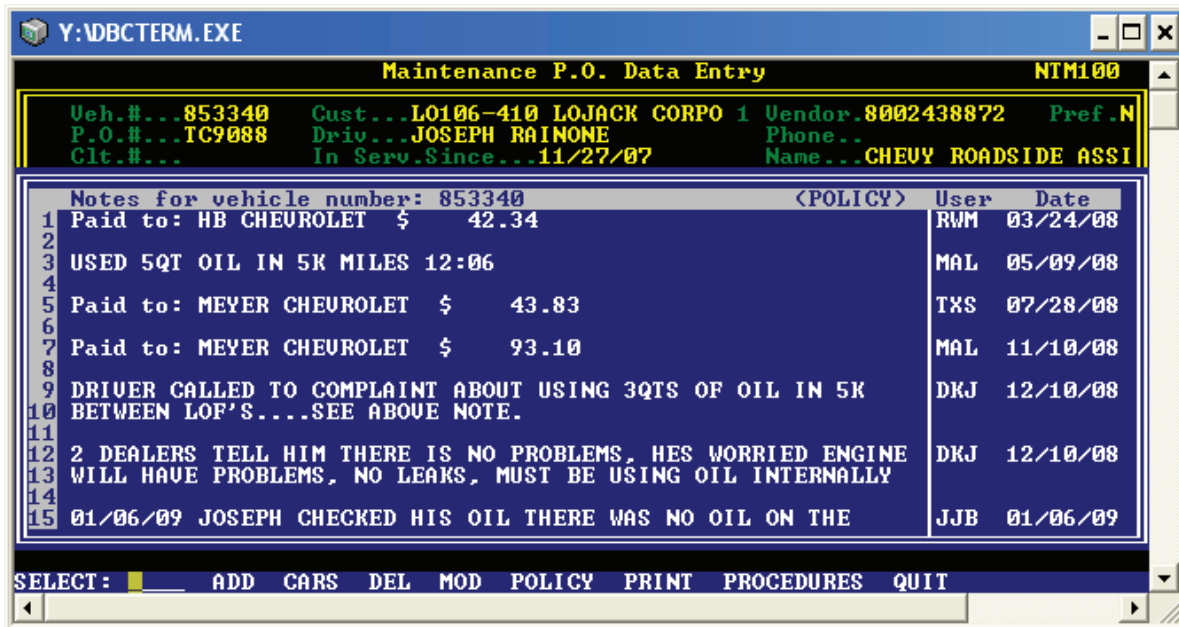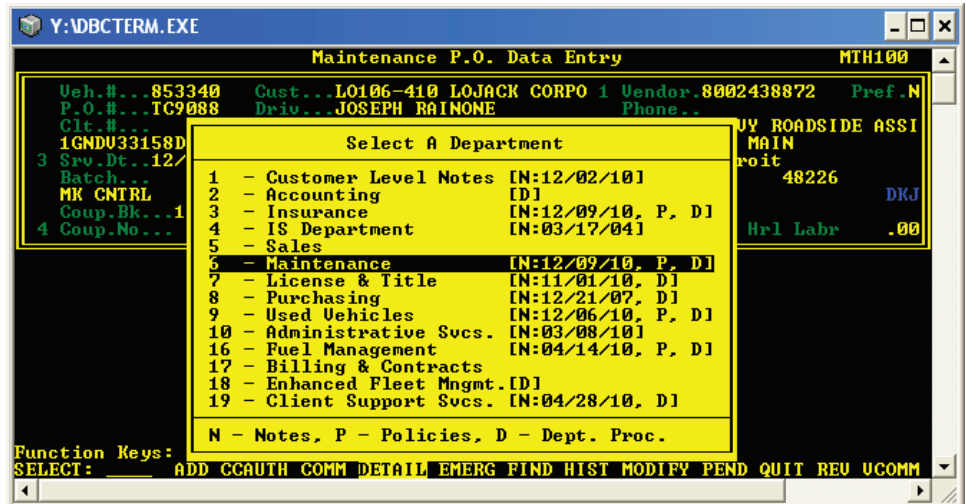
These are the notes taken by maintenance advisors on repair issues. It is a good idea to take a look at the FMS notes during every transaction.

At the bottom of the screen is another list of options. "**ADD**" lets you add a note. "**CARS**" shows the vehicles the driver has been assigned and if there is a vehicle on order. "**DEL**" is to delete a note and "**MOD**" allows you to modify a note. You can only delete and modify your own notes. "**POLICY**" shows the client's maintenance policies. "**PRINT**" is pretty self-explanatory. "**PROCEDURES**" has general information about roadside service and national accounts. To **CHOOSE** an option, either **TYPE IN THE FIRST LETTER** of the option or use the **ARROW KEYS** and press **<ENTER>**.

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Once you have accessed the customer's policies, you will be given a choice of which policy you want to look at. There are general maintenance policies, tire policies, after hours policies, and rental policies. Some clients have the same policy for their entire fleet, and some have separate policies broken down by geographic location, cost center, and even on a vehicle-by-vehicle basis. The policies can change daily, so it is important to check customer policy with every transaction.

On the screen shot below, notice that our **AUTHORIZATION LIMIT IS $1500 UP TO 85,000 MILES**. The fleet administrator prefers contact by phone (versus e-mail), and that the customer wants all their repairs done through the national account program. If repairs are over the dollar or mileage limits, or if the driver takes

his vehicle to a non-national account vendor, we **NEED TO CALL FOR APPROVAL**. When approval is obtained, document it, and give the authorization to the shop.

Another area that needs to be checked with every transaction is the **VEHICLE MAINTENANCE HISTORY**. **PRESSING** the "**F9**" key will bring up a complete maintenance **HISTORY FOR THE VEHICLE**. Taking a look at the maintenance history allows us to see if we are duplicating repairs and to make proactive service recommendations to our clients based on vehicle needs. The purchase order number, shop name, date, and mileage all show up on the F9 screen, so it's possible to track what's been done and where in case of warranty issues and repeat problems.
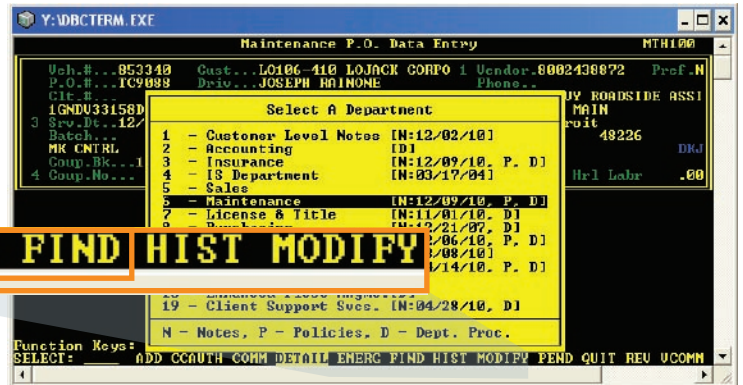
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Once the detail has been added to the PO, press **<ESCAPE>** until the "**PENDING REVIEW MAINTENANCE**" screen comes up.
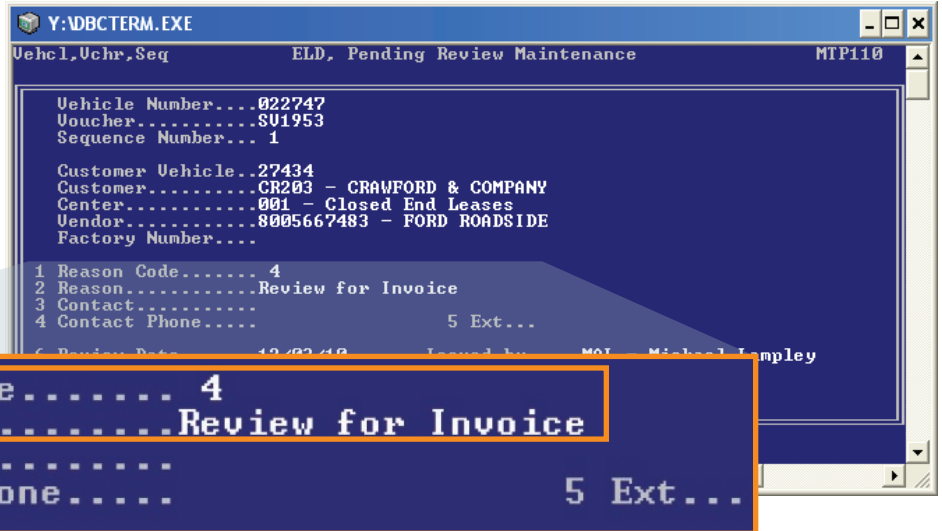

CHOOSE a reason why the PO is being left in held status and exit the screen by pressing **<ESCAPE>**. This will take you back to the main header screen. Issue the PO to the shop, and you're finished with the call.

FINDING AN EXISTING PURCHASE ORDER

To find an existing purchase order, **SELECT** "**FIND**" from the row of options at the bottom of the **MTH100** screen. Use the letter "**F**" or the **ARROW KEYS** to highlight the option and press **<ENTER>**. Purchase orders can be found by EMKAY vehicle number, purchase order number, VIN, the client vehicle number, the driver's name, or the vehicle's license plate number.
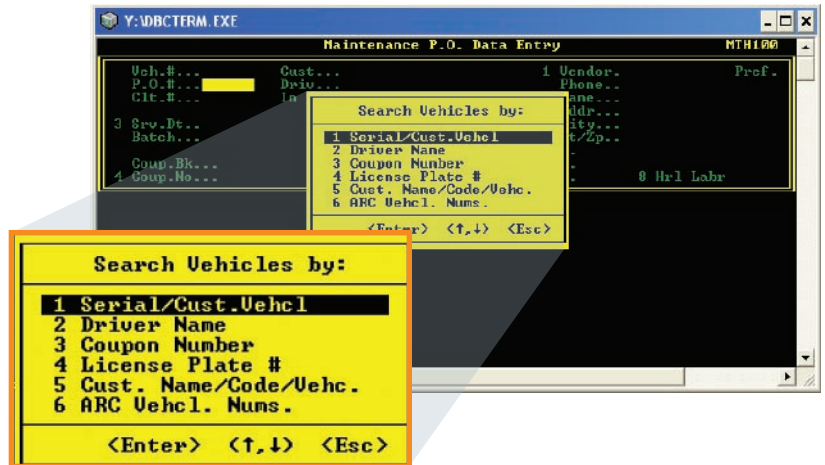
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Once you have found the purchase order, changes can be made to shop information, mileage, and repair details, as long as there isn't already another advisor in the PO.

If a purchase order is **IN USE BY ANOTHER ADVISOR**, his initials will show up in yellow in the header. It will be necessary for the other advisor or a department supervisor to unlock the PO.

OPENING A PURCHASE ORDER FOR PAYMENT
In order for **EMKAY TO RELEASE PAYMENT** for a transaction, the PO must be changed to the **"OPEN" STATUS**. POs start in the **"HELD" STATUS**.

NOTES