

Preventive Maintenance User Guide

Identifix Training Services

The Preventive Maintenance Opportunity:

Surveys show that \$67 billion dollars of automotive maintenance goes unperformed each year. Why does this maintenance go unperformed? According to AAI's Carcare.org, "Consumer neglect of regular care is a result of a lack of awareness and understanding, inconsistent messages, and misinformation and misperceptions." Additionally, vehicle age, average miles and miles driven annually continue to rise and this creates significant maintenance needs and reduces the time between scheduled maintenance mileage intervals. Finally, as you know, today's consumers are looking for a one-stop-shop to address all of their automotive repair needs.

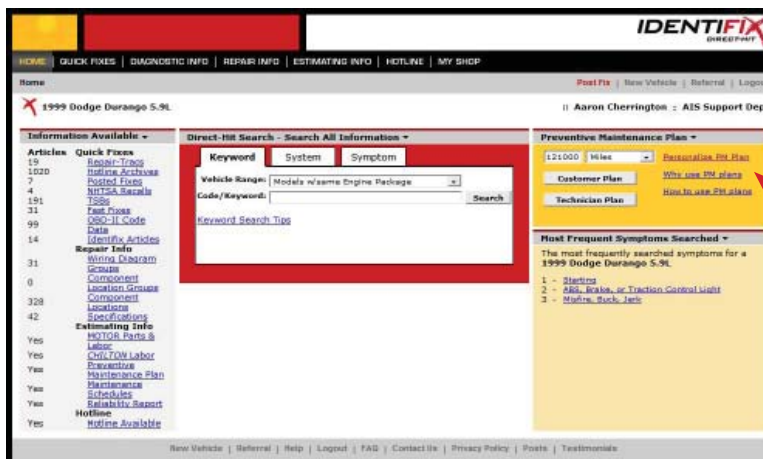
Identifix has created the industry's first comprehensive Preventive Maintenance program to boost preventive sales and increase technician efficiency. Identifix has designed an extremely comprehensive and customer friendly report for you, the automotive repair professional, to share with your customers to inform and educate them about their vehicle's scheduled maintenance needs. The Preventive Maintenance plan is a personalized report generated for each customer based on the year, make, model and mileage of their vehicle at the time of service. It takes as little as 15 seconds to create this report for each customer. It is written in a way that simplifies the explanation of the maintenance required and why the customer should do it. All maintenance items are based on the Glovebox OE recommendations, which increase customer confidence and trust. It sells the service for you.

How do I get started with Preventive Maintenance?

Identifix has made using these unique Preventive Maintenance Reports EASY. Direct-Hit is designed to give you access to the tools that you use most from the Direct-Hit vehicle "Home" page, (Figure 1).

To get to the Direct-Hit vehicle "Home" page:

1. **Log in** to Direct-Hit with your username and password.
2. **Enter the vehicle year, make, model and engine** (if needed) . In this example, we are using a 1999 Dodge Durango, with a 5.9L engine. Below, you can see an example of the vehicle "Home" page, (Figure 1).



From the Direct-Hit vehicle "Home" page, you can quickly access the Preventive Maintenance Plans

Figure 1: Direct-Hit Vehicle "Home" page

How Do I Print a Preventive Maintenance Plan?

It is as easy as 1-2-3 to create a customer Preventive Maintenance Plan (Figure 2). Simply follow steps 1-3 below that use the Direct-Hit preset options. To customize the report contents, see "How Do I Configure Direct-Hit's Preventive Maintenance DEFAULT Options for My Shop?"

To Print a PM Plan for the Customer:

1. In the Preventive Maintenance Plan area on the Direct-Hit vehicle "Home" page (Figure 1), **enter the vehicle odometer reading** and **select either miles or kilometers**.
2. For the customer PM Plan version, **select the "Customer Plan" button** and a new browser window will open and you will see the report. The report will look very similar to Figure 2.
3. If you are satisfied with the report, and you are using Internet Explorer, **select the print icon to print the report**. If you are using FireFox web browser, **select File, then Print**.*

To Print a PM Plan for the Technician:

1. In the Preventive Maintenance Plan area on the Direct-Hit vehicle "Home" page (Figure 1), **enter the vehicle odometer reading** and **select either miles or kilometers**.
2. For the Technician Plan version, **select the "Technician Plan" button** and a new browser window will open and you will see the report.
3. If you are satisfied with the report, and you are using Internet Explorer, **select the print icon to print the report**. If you are using FireFox web browser, **select File, then Print**.*

* See "Recommended Printer Settings" on the PM Planning page for best results.

PREVENTIVE MAINTENANCE PLAN

Aaron Cherrington
1999 Dodge Durango 5.9L
91,168 Miles
License: MSP 275

Ultimate Diagnostics
Ultimate Diagnostics
2714 Patton Rd
St Paul, MN 55113
P. (800) 997-1674
F. (800) 317-1674
http://www.identifix.com

At Ultimate Diagnostics, we're committed to the safety and reliability of your vehicle. Our expert technicians can recommend the right scheduled services to help prolong the life of your car and help prevent costly repairs in the future. Your vehicle is one of your largest investments...so let us help you protect it. Your 1999 Dodge Durango 5.9L currently has 91,168 miles, and your vehicle manufacturer recommends that you have the following items inspected, replaced or serviced at 90,000 miles.

CURRENT SCHEDULED MAINTENANCE
91000 MIs.
Federal Severe

INSPECT ITEMS
Your vehicle manufacturer recommends that you have the following items inspected at 90,000 miles.

- Accessory Drive Belt, Automatic Tensioning ²
- Brake Hoses
- Exhaust System
- PCV Valve ^{2,3}

REPLACE OR SERVICE ITEMS
Your vehicle manufacturer recommends that you have the following items serviced and/or replaced at 90,000 miles.

Maintenance Item

- Replace Air Cleaner Filter/Element**
The Air Cleaner Filter/Element prevents dirt and other material from entering the engine's intake system. A dirty Air Cleaner Filter may cause engine performance concerns such as low power, poor fuel economy or a rough running engine. Replace air cleaner filters in accordance with manufacturer service schedule.
- Change Engine Oil**
Engine Oil is used to lubricate moving engine parts and operate some hydraulic parts of the engine itself. Engine oil performs many functions such as cleaning, cooling, lubricating and preserving. The engine oil should be routinely checked for fluid level & condition and replaced if too dirty or lost lubricating qualities.
- Replace Engine Oil Filter**
Engine Oil Filters in combination with modern detergent oils remove most of the abrasive particles that accumulate and circulate through the engine lubrication system. Regular replacement of Engine Oil Filters can help to reduce engine wear, and prolong the life of the engine.
- Replace Spark Plugs**
The Spark Plugs are located in the cylinder and ignite the compressed air fuel mixture in the combustion chamber or cylinder which forces the pistons down. This process is a key part of what makes the engine run. The Spark Plugs electrodes wear with use. Regular spark plug inspections should be performed at the recommended intervals and the spark plugs should be replaced when severely worn.
- Lube Steering Linkage**
The Steering Linkage transfers movement from the steering rack or steering gear to the wheels. The Steering Linkage should be inspected regularly to avoid problems with steering, alignment and tire wear.

Identifix Id: 2309715 ©2006 Automotive Information Systems, Inc. All rights reserved IDENTIFIX DIRECT-HIT

Figure 2: Preventive Maintenance Report for Customer

In the above example, we typed 91,168 miles into the Mileage box on the Direct-Hit Vehicle "Home" page and pressed the "Customer Plan" button to open this Preventive Maintenance Plan for the customer in a new browser window.

How Do I Configure Preventive Maintenance DEFAULT Options for My Shop?

To set the default options for every report that will be generated for your shop, go to the PM Shop Configuration page under the My Shop section of Direct Hit.

To get to the "My Shop" page:

1. Using your mouse, **click on the My Shop icon** in the title bar, (Figure 3).

HOME | QUICK FIXES | DIAGNOSTIC INFO | REPAIR INFO | ESTIMATING INFO | HOTLINE | **MY SHOP** | Post Fix | How To Subscribe | New Vehicle | Referral | Help | Logout

Vehicle Summary | **PM Shop Configuration** | Change Password | Shop Info

IDENTIFIX DIRECT-HIT

My Shop Icon

Figure 3: Direct-Hit title bar

Shop Information:
The shop information

Update Button:
When updates are complete, click the Update button.

Default Print Options:
Select which sections are included in the report by default.

Default Odometer Unit:
Select Miles or Kilometers

The screenshot shows the IDENTIFIX web interface for configuring preventive maintenance. The 'Shop Information' section contains fields for Shop Name (IDENTIFIX), Address (2714 Patton Rd), City (Roseville), State (MN), Zip (55113), Phone (1 800 IDENTIFIX), Fax (651 637-2188), and Website (www.identifix.com). The 'Customer Report Message' section has a text area with a character counter (4 characters left) and a link for instructions. The 'Shop Logo' section includes a 'Browse' button and an 'Update' button. The 'Default Print Options' section has checkboxes for various report sections like Maintenance Schedule, Labor, Catch-Up, etc. The 'Default Maintenance Schedule Type' section has a dropdown menu. A 'General Maintenance Schedule Note' is also present at the bottom.

Figure 4: PM Shop Configuration

Customer Report Message:
The message to the customer can be customized.

Shop Logo: This is to insert the shop logo.

Additional Text: This is to select if the impactful text for each service item is to be displayed.

Default Maintenance Schedule Type: Select which schedule is used.

From the PM Shop Configuration page, configuring Direct-Hit options for Preventive Maintenance is easy. Enter the desired information into the text boxes, check or uncheck the desired options and then click the Update Button to set the default options for Preventive Maintenance.

How do I enter/change my Shop Information?

1. From the PM Configuration Page (Figure 4) enter shop name, address, phone number and fax number.
2. When you are satisfied, click the Update button to accept changes.

How do I enter/change my Customer Report Message?

1. From the PM Configuration page, (Figure 4) enter/change the message you would like printed on every customer report. There is a 515 character limit for this text, which includes spaces. A character counter has been provided for your convenience.
2. This message can also be personalized to include variables such as the customer's vehicle and mileage information. Click on the link "instructions for using markup tags" below the Customer Report Message for the latest instructions on how to integrate these variables into your message.
3. When you are satisfied with your message, click the Update button to accept changes.

How do I enter my Shop Logo?

1. The Preventive Maintenance Report gives you the ability to add your shop logo to the report. (Figure 2). All logos must either be a .jpg or a .gif image file. The logo size should be 75 x 150 pixels or smaller to display properly.
2. In the Shop Logo section of the PM Configuration Page (Figure 4), click on the Browse button and navigate to your logo image.
3. Then click the Update button and an underlined link with the logo file name will appear the text box (Figure 4) to confirm the logo image was uploaded successfully.



How do I view my current Shop Logo?

1. If you have uploaded a logo, you will see an underlined link with the logo file name displayed under the textbox in the Shop Logo section of the PM Configuration page as shown in **Figure 4**.
2. **Click on the link** to display the current logo in a new window.

How do I delete my current Shop Logo?

1. If you have entered a logo, you will see an underlined link with the logo file name displayed under the textbox in the Shop Logo section of the PM Configuration page as shown in **Figure 4**.
2. **Click the Delete button** to delete the current logo.

How do I change which sections of the Preventive Maintenance Plan are included on the customer report by default?

1. In the Default Print Options section of the PM Configuration page (**Figure 4**), you can check or uncheck any of the checkboxes to select those items as your defaults.
2. When a checkbox is checked that information is displayed on the customer Preventive Maintenance Plan.
3. When that checkbox is unchecked that information will not be displayed.
4. When you are satisfied, click the Update button to accept changes.

How do I change which sections of the Preventive Maintenance Plan are included on the technician report by default?

1. In the Default Print Options section of the PM Configuration page (**Figure 4**), you can check or uncheck any of the checkboxes to select those items as your defaults.
2. When a checkbox is checked that information is displayed on the technician Preventive Maintenance Plan.
3. When that checkbox is unchecked that information will not be displayed.
4. When you are satisfied, click the Update button to accept changes.

How do I tell Direct-Hit to use the next interval for determining which service interval is used by default?

By default, Direct-Hit will use the closest service interval that has passed to determine which maintenance items are displayed. In the Figure 2 example, the vehicle had 91,168 miles, so the 90,000 mile service interval was used to determine which items were due for maintenance.

1. To use the next interval by default, **check the “Show next schedule maintenance” checkbox**. In 91,168 miles example, Direct-Hit would use the 93,000 mile service interval if this checkbox was checked. This helpful feature shows the customer their future maintenance needs.
2. When you are satisfied, **click the Update button** to accept changes.

How do I configure if showing informational text is included on the customer report by default?

For action maintenance items such as “Replace Fuel Filter” or “Service Automatic Transmission”, Direct-Hit can include additional text that includes an *operational description* and *impactful text* about why it is important to maintain this item. By default, both of these items are included. For compatibility with MAP Guidelines, check only the *operational description* checkbox, see www.motorist.org for more information.

1. To include *operational descriptions* for each part, **check the “Show Operational Description” checkbox**. If you do not want it displayed, uncheck this checkbox.
2. To include the *impactful text* for each part, **check the “Show Impactful Text” checkbox**. If you do not want it displayed, uncheck this checkbox.
3. When you are satisfied, **click the Update button**, to accept changes.

How do I select which maintenance schedule is used by default?

In the Default Maintenance schedule section of **Figure 4**, you can select the Original Equipment (OE) manufacturer Federal Maintenance Schedule or OE Federal Severe Maintenance Schedule to be used as the default maintenance schedule.

1. To use the OE Federal Maintenance Schedule, select this from the Maintenance Schedule Type drop down box.
2. To use the OE Federal Severe Maintenance Schedule, select this from the Maintenance Schedule Type drop down box.
3. When you are satisfied, click the Update button to accept changes.

How do I select the odometer unit by default?

In the Default Unit section of Figure 4, you can select miles or kilometers to be used as the default odometer units.

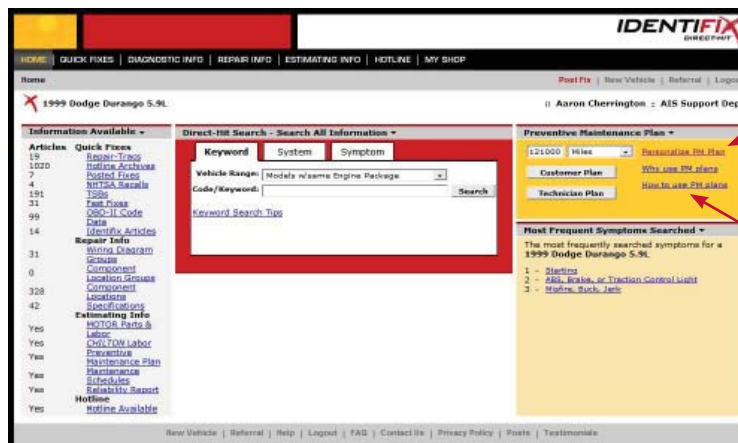
1. To use miles as the default unit, select "Miles" from the drop down box.
2. To use kilometers as the default unit, select "Kilometers" from the drop down box.
3. When you are satisfied, click the Update button to accept changes.

How Do I Personalize Preventive Maintenance Options for a Single Report?

Once the default options have been set, you can still make per customer changes to any Preventive Maintenance Plan. The defaults that were set earlier will not be altered when changes are made to the PM Configuration for a Single Report. When you have the options configured, you can select either the "Customer Plan" or "Technician Plan" to display the report with the current options.

To get to the PM Configuration page to make changes to a single report before you print it out:

1. Using your mouse, **click on the "Personalize PM Plan" link** in the Preventive Maintenance Plan area on the Direct-Hit vehicle "Home" page (**Figure 5**).



PM Plan for this car:
To change options for this report.

PM Plan Instructions:
This document can also be printed from here.

Figure 5: Direct-Hit Vehicle "Home" page

Additional Text:

This is to select if the informational text for each service item is to be displayed on the Customer Report.

Print Options:

Select which sections are included in the report by default.

Next Interval:

Check this box to show the next interval maintenance items.

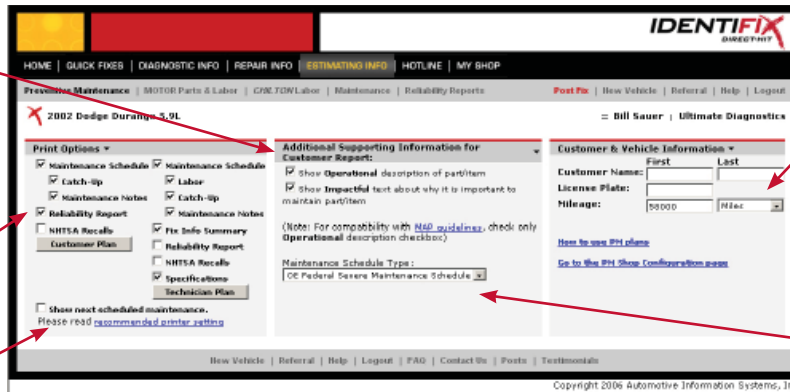


Figure 6: PM Configuration for a Single Report

Customer Information:

This report can be customized with the customer's name, land license plate number.

Default Maintenance Schedule Type:

Select which schedule is used.

How do I change which sections of the Preventive Maintenance Plan are included on this customer report?

1. In the Print Options section of the PM Configuration page (Figure 6), the checkboxes show your shop's default report configuration that can be changed per report.
2. When a checkbox is checked that information is displayed on the customer Preventive Maintenance Plan.
3. When that checkbox is unchecked that information will not be displayed.
4. When you are satisfied, click the "Customer Plan" button to create a customer report with these sections included.

How do I change which sections of the Preventive Maintenance Plan are included on this technician report?

1. In the Print Options section of the PM Configuration page (Figure 6), the checkboxes show your shop's default report configuration that can be changed per report.
2. When a checkbox is checked that information is displayed on the technician Preventive Maintenance Plan.
3. When that checkbox is unchecked that information will not be displayed.
4. When you are satisfied, click the "Technician Plan" button to create a technician report with these sections included.

How do I tell Direct-Hit to use the next interval for determining which service interval is used for this report?

1. To use the next service interval, **check the Show Next schedule maintenance checkbox**. This helpful feature informs the customer on upcoming maintenance required at the next scheduled interval.
2. When you are satisfied, **click the "Customer Plan" button or the "Technician Plan" button to print** the report with the next interval used to determine the maintenance items.

How do I show informational text on the customer report for this report?

For action maintenance items such “Replace Fuel Filter” or “Service Automatic Transmission”, Direct-Hit can include additional text that includes an *operational description* and *impactful text* about why it is important to maintain this item. By default, both of these items are included. For compatibility with MAP Guidelines, check only the *operational description* checkbox, see www.motorist.org for more information.

1. To include *operational descriptions* for each part, **check the *Show Operational Description* checkbox**. If you do not want it displayed, uncheck this checkbox.
2. To include the *impactful text* for each part, **check the *Show Impactful text* checkbox**. If you do not want it displayed, uncheck this checkbox.
3. When you are satisfied, **click the “Customer Plan” button** to create a customer report with these sections included.

How do I select which maintenance schedule is used for this report?

You can select the Original Equipment (OE) manufacturer Federal Maintenance Schedule or OE Federal Severe Maintenance Schedule to be used as the default maintenance schedule for this report.

1. To use the OE Federal Maintenance Schedule, select this from the Maintenance Schedule Type drop down box.
2. To use the OE Federal Severe Maintenance Schedule, select this from the Maintenance Schedule Type drop down box.
3. When you are satisfied, click the “Customer Plan” button or the “Technician Plan” button to print that report.

How can I add a customers name and license plate information to a PM Plan?

You can further personalize the customer experience by adding their name to the report.

1. In the Customer & Vehicle information box (**Figure 6**), enter the customer first and last name in the appropriate boxes.
2. The customer’s license plate number can also be added, if desired.
3. When you are satisfied, click the “Customer Plan” button to create a customer report with these personalizations included.

How do I select the odometer unit for this report?

You can select miles or kilometers to be used for this report using the drop down.

1. To use miles as the unit, **select “Miles”** from the drop down box.
2. To use kilometers as the unit, **select “Kilometers”** from the drop down box.
3. When you are satisfied, **click the “Customer Plan” button or the “Technician Plan” button to print** that report.

What if I need more help?

Please call Direct-Hit Customer Support at **800.997.1674** or use our **Contact Us form** and one of our trained staff will be able to answer any Preventive Maintenance or Direct-Hit questions.

