

# Factory Scheduled Maintenance User Guide

## The Factory Scheduled Maintenance Opportunity:

Surveys show that \$50 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.

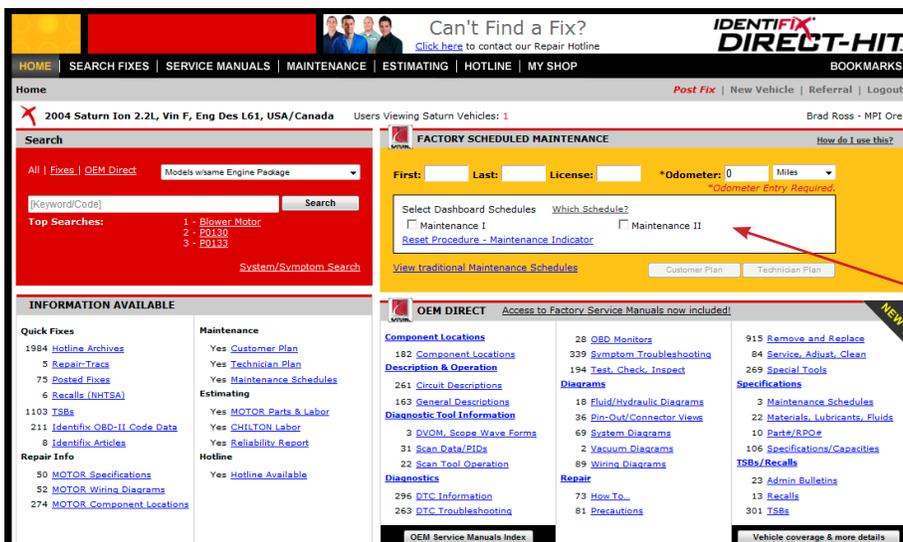
Identifix has created the industry's first comprehensive Factory Scheduled Maintenance program to boost preventive sales and increase technician efficiency. Identifix has designed an extremely comprehensive and customer friendly report for you, the automotive repair professional, to share with your customers to inform and educate them about their vehicle's scheduled maintenance needs. The Factory Scheduled 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 Factory Scheduled Maintenance?

Identifix has made using these unique Factory Scheduled 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 2004 Saturn Ion, with a 2.2L engine. Below, you can see an example of the vehicle "Home" page, (Figure 1).
3. If applicable, select the Dashboard Schedule and/or Distance/Time Schedule for your vehicle.
4. When completed, click either Customer Plan or Technician Plan.



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

Figure 1: Direct-Hit Vehicle "Home" page

## How do I create a customized Factory Scheduled Maintenance Plan for my vehicle?

Factory Scheduled Maintenance is designed to provide you with accurate, straight from the glovebox, maintenance plans for your vehicle. Getting started is easy.

**Current Plan/Next Plan:**  
Displays the current maintenance plan schedule for your vehicle. When clicked, this displays the next scheduled maintenance for your vehicle if applicable.

**Change Plan:**  
When clicked, this calls a popup window that allows you to update the information entered on the vehicle home page.

The screenshot shows a web interface for a maintenance plan. At the top, there are buttons for 'Next Plan', 'Change Plan', and 'Print Preview'. Below these is a red header with the text 'FACTORY SCHEDULED MAINTENANCE'. The main content area is divided into sections: vehicle information (Brad Ross, 2004 Saturn Ion, 120,000 miles), Identifix Repair Shop details, a technician's note, and a list of recommended maintenance items. The 'SELECTED SCHEDULES' section is highlighted with a red arrow. Below it are sections for 'Additional Required Services', 'OPTIONAL CONDITION/SCHEDULE', and 'CATCH-UP MAINTENANCE'. The 'CATCH-UP MAINTENANCE' section has a 'Hide []' button next to it, also highlighted with a red arrow.

**Print Options:**  
Clicking on Print Preview button calls a popup preview of the plan. Selecting the print icon from the popup prints the plan

**Selected Schedules:**  
Displays all schedules selected from in order to display the plan

**Show/Hide Functionality:**  
When a section is hidden it will no longer show on the printout.

Figure 2: Excerpt of Customer Plan

### To Create a Customer or Technician Plan:

1. In the Factory Scheduled Maintenance Plan area on the Direct-Hit vehicle "Home" page (Figure 1), **enter the vehicle odometer reading and select either miles or kilometers.**
2. If your vehicle's dashboard maintenance light is on, select one of the Dashboard Schedules.
3. If there are distance/time based schedules, select one.
4. For the customer plan version, **select the "Customer Plan" button** and you will be navigated to the Customer Plan SubTab.
5. For the technician plan version, **select the "Technician Plan" button** and you will be navigated to the Technician Plan SubTab. (See Figure 3)

### How do I view the next scheduled maintenance plan for this vehicle?

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

## How do I modify the information that I entered for my plan?

1. To change the information you have entered for your plan, click the “Change Plan” button within the Customer or Technician Plan.
2. After clicking the “Change Plan” button, the “Change Plan” popup will display over the Customer or Technician Plan.
3. Within this popup you can modify the customer name, vehicle information, odometer, dashboard schedules (if applicable), and time/distance based schedules.

## How Do I Print a Factory Scheduled Maintenance Plan?

It is as easy as 1-2-3 to create a customer Factory Scheduled Maintenance Plan (Figure 3). 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 Factory Scheduled Maintenance DEFAULT Options for My Shop?”

### To Print a Plan for the Customer:

1. In the Factory Scheduled 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 plan version, select the “Customer Plan” button and you will be navigated to the Customer Plan SubTab. The page will look very similar to Figure 3.
3. If you are satisfied with the report and want to print, you can either select the “Print Preview” button to preview the report and select the printer icon.

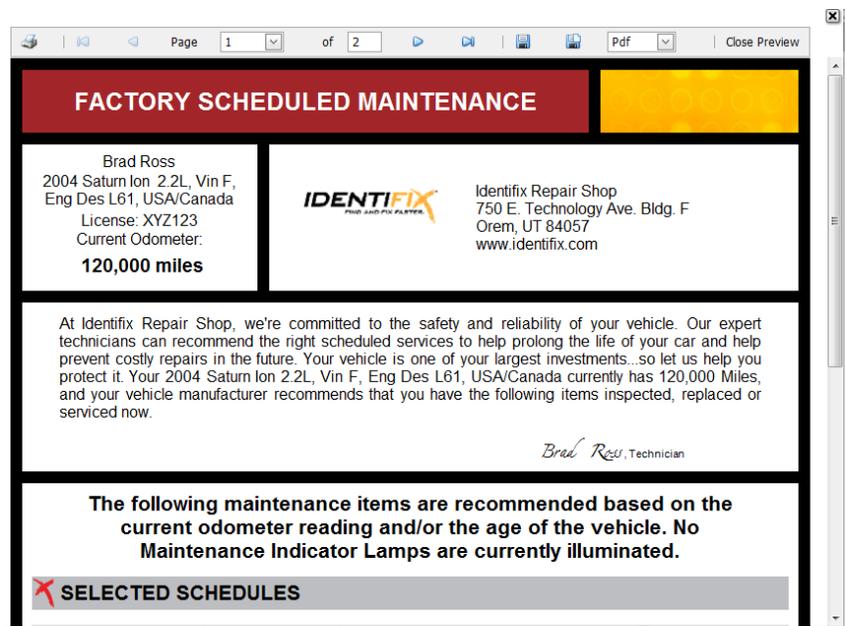


Figure 3: Factory Scheduled Maintenance Report Print Preview

### To Print a Plan for the Technician:

1. In the Factory Scheduled 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 plan version, select the “Technician Plan” button and you will be navigated to the Technician Plan SubTab. The page will look very similar to Figure 3.
3. If you are satisfied with the report and want to print, you can either select the “Print Preview” button to preview the report and select the printer icon.

### To Save and Email a Plan for the Customer:

1. When in the Customer Plan, select Print Preview. The Print Preview pane of the plan will popup over the page.
2. Click to save the document and select where on your computer you would like to store the file.
3. Open your email program and click to add an attachment. Go to the location where you saved the plan file and attach to your email.

## How Do I Configure Factory Scheduled Maintenance DEFAULT Options for My Shop?

To set the default options for every report that will be generated for your shop, go to the Factory Maintenance 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 4).



Figure 4: Direct-Hit title bar

From the Factory Maintenance Configuration page, configuring Direct-Hit options for Factory Scheduled 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 Factory Scheduled Maintenance.

**Shop Information:**  
The shop information

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

**Shop Logo:**  
This is to insert the shop logo.

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

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

**Signature:** This is to add a signature font to the plan

**Default Odometer Unit:**  
Select Miles or Kilometers

Figure 5: Factory Maintenance Configuration



## How do I enter/change my Shop Information?

1. From the Factory Maintenance Configuration Page (**Figure 5**) 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 Factory Maintenance Configuration page, (**Figure 5**) 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 Factory Scheduled Maintenance Report gives you the ability to add your shop logo to the report. 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 Factory Maintenance Configuration Page (**Figure 5**), **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 6**) to confirm the logo image was uploaded successfully.

## How do I preview my Shop Logo and Customer Report Message?

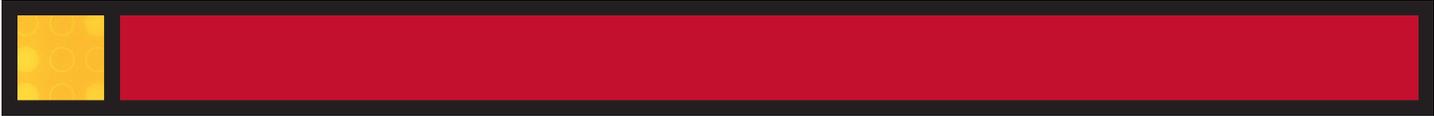
1. In the Shop Logo section of the Factory Maintenance Configuration page you will see a link saying "Preview Logo & Message" as shown in **Figure 5**.
2. **Click** on **the link** to display a sample Customer Plan with your shop logo and customer report message.

## 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 Factory Maintenance Configuration page as shown in **Figure 5**.
2. **Click** the **Delete button** to delete the current logo.

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

1. In the Default Print Options section of the Factory Maintenance Configuration page (**Figure 5**), 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 Factory Scheduled 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 Factory Scheduled Maintenance Plan are included on the technician report by default?

1. In the Default Print Options section of the Factory Maintenance Configuration page (**Figure 5**), 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 Factory Scheduled 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 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.

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 the odometer unit by default?

In the Default Unit section of Figure 6, 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 show informational text on the customer report for this report?

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](http://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 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 view the 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 Factory Scheduled Maintenance or Direct-Hit questions.