

LEARNING GUIDE

PROGRAM TITLE: Warranty Administrator

DUTY: Process Open/Closed Repair Orders

COMPETENCY A-1: Verify Customer Vehicle Information

INTRODUCTION:

An important part of your job as a Warranty Administrator is to verify your customer's vehicle information as part of the tasks involved with opening and closing repair orders. This competency will require you to verify information related to your customer's recreational vehicle. As a Warranty Administrator, it is important to develop the skills and knowledge necessary to determine the correct customer vehicle information and check on the vehicle's service history. This guide will provide you with the working knowledge and practical skills required to perform this competency.

PERFORMANCE OBJECTIVE:

Given the need to process open and closed repair orders, verify customer vehicle information to meet the RVDA standards of excellence outlined in the Performance Test on pp. 16-17.

ENABLING OBJECTIVES:

1. Practice verifying the correct customer vehicle information.
2. Practice checking the vehicle's service history.

PREREQUISITES, IF ANY:

- Knowledge of relevant forms and the information they should contain
- Knowledge of basic computer skills

LEARNING EXPERIENCE #1

ENABLING OBJECTIVE #1: Practice verifying the correct customer vehicle information.	
Learning Activities	Special Instructions
Read the Information Sheet titled “Overview of Vehicle Information” on pp. 3-5. Review your dealership’s policies and practices related to verifying customer vehicle information. You may wish to contact Warranty Administrators at other RV dealerships (or your local car dealership) to discuss their practices related to warranty work. Compare them to your own; then determine if any of their policies might benefit your dealership. Demonstrate your knowledge of how to verify the correct customer information by completing the Self-Check on p. 6. Check your answers against the Self-Check Model Answers on p. 7. Practice verifying the correct customer vehicle information with a co-worker. Ask your co-worker to use the checklist titled “Verifying the Correct Customer Vehicle Information” on p. 8 of the Practice Exercise as a guide for assessing your progress.	Discuss with the owner or General Manager how those policies were developed and the intention behind each one. Ask your mentor to recommend a dealer you might contact if you don’t already know of one. Ask your mentor to suggest a co-worker who can observe and help you with your practice sessions and the Practice Checklist.

INFORMATION SHEET

OVERVIEW OF VEHICLE INFORMATION

Whether the situation is for regular or warranty RV repairs, the repair order (RO) is the center of all activity. It does not matter whether your dealership is using paper forms or has all its data on computer terminals. All the pertinent information about the RV, its situation, and what you or others do about it will typically be recorded on ROs. Information on ROs needs to be correct, it needs to be in the right place, and it needs to be written with words or codes that are understood exactly and completely by everyone who deals with the RO. Before, during, and after service, information on the RO about an RV must be verified.

Customer Information

This may have happened to you: A discussion begins between you and the customer. Together, you are discussing some problems with the RV, the work to be done, the work that has been done, and/or the warranty situation – any combination of these or similar topics. Something about the conversation is confusing. Facts don't seem to be right, and after a while, you realize that you have not matched the RV to its owner. You and this person are talking about different vehicles. Most of the time, you can make a little joke, apologize, or in some other way, straighten out the situation without any big problem. People own different RVs, either at the same time or in sequence, one after another. Records on an RV are not always up-to-date.

However, this situation brings up a very important point; you must confirm that the customer you are *talking to* and the RV you are *talking about* are paired correctly.

Here are some hints for finding the information that will verify that the customer and RV are the ones you need to connect:

- **Check the RO.** The RO will contain information about the customer and the coach. It takes only a few seconds to look at the coach or ask the customer for his/her name, address, phone number, or other identifying facts.
- **Look for existing records.** If this customer or if this coach has been to your dealership in the past, there should be records. However, customers often trade up to bigger and better coaches, so the owner of a coach might have changed since the previous visit of this coach to your dealership.
- **Confirm the VIN.** The vehicle identification number (VIN), by law, should never be changed. It is the ideal way to confirm the identity of a coach.

Vehicle Information

Generally, vehicle information falls into four categories:

- Description and mileage
- History, inspection, and warranty
- Features
- Options

INFORMATION SHEET (continued)

Again, some or all of this information might already be present on existing records. If not, you need to complete enough information, for your records, to create a unique identity for this coach in your records.

Check the RO and try to fill in any blanks that you see. These might include mileage, date of purchase, warranty eligibility, or other items. Understand that the RO could get rejected and the work might not get done in your shop if certain key pieces of information are not in the RO.

Also, check the dealer acceptance form (DAF) for the delivery checklist. It might contain information that will be very valuable in handling a particular warranty job.

Authority for the Work

For warranty work, you need two kinds of authority before doing the job. First, for a warranty repair, you need the authority from the manufacturer to verify that the work you intend to do *should be done* to this coach. Through a recall, for example, you will know which coaches have been authorized for a repair to a particular defect or problem.

Second, you need the customer's signature before you can proceed with the work. The customer signature is a legal authorization that says the customer understands the planned work and agrees to have it done. Also, make sure you understand your company policy for situations where the work will cost more than originally agreed upon; will you need a further signature or initials from the customer if the cost of work exceeds a certain amount?

When you verify the correct customer vehicle information, follow these steps:

1. Confirm that the customer is matched to the vehicle to include:
 - a. Consulting the RO and customer records, if available
 - b. Confirming that you know how to find needed information within your dealership's computer system
 - c. Searching the computerized record-keeping system
 - d. Ensuring that the customer and vehicle are matched
2. Update changes to the customer information, if needed, to include:
 - a. Accessing customer files and records from computers and/or forms
 - b. Clarifying the number of vehicles that are or have been owned by this customer
 - c. Asking questions whose answers provide needed information for updating customer files
 - d. Checking the RO to determine what other information is needed, if any
 - e. Filling in all blanks on the RO, as needed
 - f. Ensuring that corrections have been made and all customer information is current and correct

INFORMATION SHEET (continued)

3. Verify needed information, including the mileage, date of purchase, and warranty information to include:
 - a. Determining where to find key information on the RO
 - b. Confirming that all needed information is now available on the RO
 - c. Ensuring and verifying that all needed information has been gathered
4. Check for the customer signature on the RO to include:
 - a. Knowing where to find all signature locations on the RO
 - b. Confirming whether an authorization signature is needed
 - c. Ensuring that all blank spaces that need signatures or initials have been filled

TOOLS, EQUIPMENT, SUPPLIES, OR MATERIALS

The following tools, equipment, supplies, or materials are needed to verify the correct customer vehicle information:

- Customer files/records
- Repair orders
- Access to customer files and records
- Access to customer's RV

WORKER BEHAVIORS

Worker behaviors play a key role in verifying that the correct customer vehicle information has been gathered. The behaviors important to your success in completing this task are:

- Detail oriented
- Accuracy
- Open, professional, and clear communication
- Thoroughness
- Ability to ask the “right” questions
- Active listening

SELF-CHECK

DIRECTIONS: Check your knowledge of verifying the correct customer vehicle information by responding to the following questions. For True/False questions, circle “TRUE” if the statement is correct, and circle “FALSE” if the statement is incorrect. For multiple choice questions, select the most correct response. For short answer questions, write a brief response to the question. Check your answers with those on the Self-Check Model Answers page that follows.

1. The most important document related to warranty repair is the RO.

TRUE
FALSE

2. Early in the discussion of a repair with a customer, the warranty administrator must confirm that the RV under discussion is owned by that customer and not someone else.

TRUE
FALSE

3. Three important sources of information about an RV come from the file of ROs, the VIN, and the:

- a. Customer memory
- b. Existing records
- c. Customer’s trip log
- d. RV magazines

4. Before beginning any warranty work, the most important thing that the warranty administrator must have is:

- a. Time to talk with the customer
- b. Parking space available on the lot
- c. Signature authority
- d. A blank RO to complete

5. What are the steps for verifying the correct customer vehicle information?

SELF-CHECK MODEL ANSWERS

DIRECTIONS: Compare your answers to the Self-Check with the Model Answers provided below.

- | | | |
|----|--------------|--|
| 1. | TRUE | However, there are other important documents, including the DAF, when the situation involves a recently delivered RV. |
| 2. | TRUE | Because RVs are bought and sold and some customers own more than one RV (either at the same time, or over a period of years), you can avoid embarrassing situations by quickly confirming that the customer and the warranty administrator are talking about the RV owned by this particular customer. |
| 3. | b. | For accurate information relevant to a specific RV, you need hard data and facts such as the information that can be found in existing records for that coach, |
| 4. | c. | While all the items listed here can be important to the warranty administrator, the most important item is the signature authority to proceed. |
| 5. | MODEL ANSWER | <p>The four steps to verifying the customer vehicle information are:</p> <ol style="list-style-type: none">1. Confirm that the customer is matched to the vehicle.2. Update changes to the customer's information.3. Verify the needed information, including mileage, date of purchase, and warranty information, as needed.4. Check for a customer signature on the RO. |

Level of Performance: Your responses to the items on the Self-Check should match the Self-Check Model Answers. If you missed some points or have questions, review the Information Sheet, or if necessary, consult with your mentor.

PRACTICE EXERCISE

DIRECTIONS:

- **Review** your ability to verify the correct customer vehicle information using the following checklist as a guide.
- **Discuss** with your co-worker the fundamentals of this task.
- **Practice** each stage of verifying the correct customer vehicle information.
- **Ask** your co-worker to use the checklist to evaluate your ability to perform this task.

Verifying the Correct Customer Vehicle Information

Topics	Level of Performance		
	Yes	With Help	No
When verifying the correct customer vehicle information, the learner...			
1. Confirmed with the customer any and all issues needed to verify that a specific RV was owned by the customer.			
2. Verified that the customer was matched to the correct RV.			
3. Searched all four categories of vehicle information.			
4. Obtained all necessary signature authorities to proceed with the warranty work.			
5. Updated customer information on the company records or in the tracking system.			
6. Verified that all needed information was available before beginning warranty work.			

Level of Performance: When you are finished with this Practice Exercise, you should be able to comfortably discuss and perform any of the actions included in it. Your ratings on the checklist for this Practice Exercise should be **Yes** for all items. If you received **With Help** or **No** ratings for any items, review your performance with your mentor.

LEARNING EXPERIENCE #2

ENABLING OBJECTIVE #2: Practice checking the vehicle's service history.	
Learning Activities	Special Instructions
Read the Information Sheet titled “Overview of Vehicle Service History” on pp. 10-12. Discuss with your mentor some of the challenges of checking all aspects of a vehicle's service history. Review the dealership's warranty policies and procedures that address the process of checking a vehicle's service history. You may wish to explore the topic of inspection skills, as you will sometimes be responsible for an inspection to determine service needs or service history. Demonstrate your knowledge of checking a vehicle's service history in the Self-Check on p. 13. Check your answers against the Self-Check Model Answers on p. 14. Practice following up on checking a vehicle's service history with a co-worker. Ask your co-worker to use the checklist titled “Checking the Vehicle's Service History” on p. 15 of the Practice Exercise as a guide for assessing your progress. Arrange to complete this Learning Guide titled <i>Verify Customer Vehicle Information</i> by asking your mentor to evaluate your performance using the criteria in the Performance Test on pp. 16-17.	Discuss with your mentor any aspects of the policies you do not understand or question. Explore with your mentor what inspection skills would be used in assembling a complete service history for an RV. Ask your mentor to suggest a co-worker who can observe and help you with your practice sessions and the Practice Checklist.

INFORMATION SHEET

OVERVIEW OF VEHICLE SERVICE HISTORY

There is some similarity between going to the doctor and servicing an RV. If the person fixing the problem has a complete history of the person (or the RV), the whole process works better, thus saving money on diagnostic tests that are not needed.

Getting a complete service history for each RV needing warranty work is a way to ensure that the diagnosis and treatment of the RV goes smoothly and costs no more than absolutely necessary.

Been There? Done That?

One major concern with warranty work is whether the same repair has been performed already. Knowing this piece of information can dictate whether or not you can go forward with doing the work. If the repair has already been done, that can change its status in terms of who should pay for the repair – the manufacturer or the dealer. This step needs to be completed successfully so that authorization can be given or denied – whatever is appropriate to the situation.

Here are some hints for checking up on the vehicle's service history:

- **Check the customer's files.** This can help you determine whether this is, indeed, a warranty issue or simply a customer-come-back (the customer has been here before, for the same repair job). Then you can determine whether the come-back is due to a defective part, technician error, or some other reason.
- **Check the RO.** Notes on previous ROs can help identify what kind of repair is needed and who is now responsible for paying the cost.
- **Check the manufacturer's website.** Many manufacturers maintain excellent websites, so you can check to see if some other dealer has already performed the work. Get familiar with how to track repairs and record repairs on all your manufacturers' websites – such information can help you and help other dealers.

Who Should Pay?

A thorough check of paperwork can help determine who should pay for the repair. As you assemble the vehicle history, consider several things:

- Is the cost of the repair work covered by any policy or organization?
- If it is a newly delivered RV, is the transportation company responsible for costs of repair work?
- Or, is the repair work covered by a warranty?
- Or, is the customer responsible for covering the cost?

Again, notes on previous ROs and information from manufacturers might be helpful. The DAF might also be a good source of information. Your goal is to make sure that the repair costs become the responsibility of the correct party.

INFORMATION SHEET (continued)

Build Your Inspection Skills?

Warranty work can be needed for both new and already-owned RVs. Damage during delivery or repair of defective parts or systems are all reasons for warranty work. Before the work begins, the vehicle's service history must be as complete as possible. As part of completing the service history for the RV, you might need to conduct an inspection of the RV, to verify information about the RV, including its current condition.

Gather all existing information on the RV, including customer and repair history, dealer acceptance form, and any other information.

Work with your mentor or an experienced co-worker to discover the best ways to determine the following categories of information:

- RV details – including all pertinent owner and vehicle information
- History of previous inspections – by whom, when, where?
- Outside features – walls, roof, underside, storage compartments, wheels, utilities, propane, engine compartment, trailer coupling (if applicable)
- Inside features – interior finishes; proper functioning of cockpit, kitchen, bath, and fresh water systems, waste system, HVAC, electrical (wiring), electronics (entertainment), safety devices

Discuss what tools you need to complete this inspection. Discuss some hints that will make the inspection easier and more productive.



Process for Collecting a Complete Vehicle History

The steps for checking a vehicle's service history include the following:

1. Check whether the same repair has been previously performed to include:
 - a. Accessing customer files
 - b. Checking ROs
 - c. Visiting the manufacturer's website to get current on warranty repairs and this particular vehicle's warranty repair history
 - d. Deciding the correct payment category (i.e., who pays) for the repair being planned
 - e. Ensuring that the repair history is clear

INFORMATION SHEET (continued)

2. Check whether the defect or problem was previously noted on the DAF or other paperwork to include:
 - a. Accessing the DAF, ROs, or any other paperwork not already being considered
 - b. Interpreting the DAF, ROs, or other paperwork
 - c. Clarifying or further defining the damage, as needed
 - d. Ensuring that the responsibility for the repair is assigned to the correct party



TIP

Avoid doing the same repair twice by checking the RV's repair history.

TOOLS, EQUIPMENT, SUPPLIES, OR MATERIALS

The following tools, equipment, supplies, or materials are needed to check the vehicle's service history:

- Customer files
- ROs and other vehicle history documents
- Manufacturer's website access
- Dealer acceptance form

WORKER BEHAVIORS

Worker behaviors play a key role in checking the vehicle's service history. The behaviors important to your success in completing this task are:

- Attention to detail
- Thoroughness
- Ability to follow established procedures in planned, logical steps
- Natural curiosity that leads to relevant and insightful questions about the situation
- Patience
- Keen observation skills

SELF-CHECK

DIRECTIONS: Check your knowledge of following up on checking the vehicle's service history by responding to the following questions. For True/False questions, circle "TRUE" if the statement is correct, and circle "FALSE" if the statement is incorrect. For multiple choice questions, select the most correct response. For short answer questions, write a brief response to the question. Check your answers with those on the Self-Check Model Answers page that follows.

1. If it happens that a warranty administrator finds out that a repair has been done to an RV and that RV is back in the shop for the same repair, there is no problem; the work should be done again.

TRUE
FALSE

2. The manufacturer's website is one good place to check when trying to find out what repairs have been done to a particular RV.

TRUE
FALSE

3. If the RV has been damaged during delivery, the payee for a repair will probably be the:

- a. Dealership
- b. Manufacturer
- c. Customer
- d. Transportation company

4. Describe the process for collecting a complete vehicle history.

SELF-CHECK MODEL ANSWERS

DIRECTIONS: *Compare your answers to the Self-Check with the Model Answers provided below.*

- | | | |
|----|--------------|--|
| 1. | FALSE | This situation is a “red flag” situation that needs attention. The reason for the repeat repair might be a serious concern to both the dealership and the manufacturer, both in terms of whether to do the work AND who will pay for the work. |
| 2. | TRUE | Other good sources are the customer’s records at the dealership and the ROs on file. |
| 3. | d. | |
| 4. | MODEL ANSWER | <p>The process for collecting a complete vehicle history is to:</p> <ol style="list-style-type: none">1. Check whether the same repair has been previously performed on this vehicle.2. Check whether the defect or problem was previously noted on the DAF or other paperwork. |

Level of Performance: Your responses to the items on the Self-Check should match the Self-Check Model Answers. If you missed some points or have questions, review the Information Sheet, or if necessary, consult with your mentor.

PRACTICE EXERCISE

DIRECTIONS:

- **Conduct** the activities listed below using the following checklist.
- **Continue** practicing until you achieve a **Yes** rating for every item on the checklist provided in this Practice Exercise.
- **Ask** your co-worker to check your practice using the checklist below.

Checking the Vehicle's Service History			
Topics	Level of Performance		
	Yes	With Help	No
When checking the vehicle's service history, the learner...			
1. Investigated whether the same repair has been done before to this RV by checking the:			
a. Customer files			
b. ROs			
c. Manufacturer's website			
2. Identified the party responsible for payment.			
3. Inspected the vehicle, so that damage and repair situations could be objectively identified.			
4. Checked the paperwork, such as the DAF, to look for less obvious records of previous repairs to a particular vehicle.			

Level of Performance: When you are finished with this Practice Exercise, you should be able to comfortably discuss and perform any of the actions included in it. Your ratings on the checklist for this Practice Exercise should be **Yes** for all items. If you received **With Help** or **No** ratings for any items, review your performance with your mentor. After this, ask your mentor to help you practice your skills further.

PERFORMANCE TEST

Learner's Name:		Date	
Competency: A-1 Verify Customer Vehicle Information		Test Attempt 1st 2nd 3rd	
Mentor's Signature/Approval	OVERALL EVALUATION		
Directions: Your mentor will provide you with one or more opportunities to verify the customer vehicle's information . You are to perform the actions needed to deal with the situation(s) in a way that meets company requirements and ethical business practices. Your mentor will evaluate your performance using the criteria listed below.	Level Achieved	PERFORMANCE LEVELS	
		4 – Can perform this skill without supervision and with initiative and adaptability to problem situations.	
		3 – Can perform this skill satisfactorily without assistance or supervision	
		2 – Can perform this skill satisfactorily, but requires some assistance and/or supervision.	
		1 – Can perform parts of this skill satisfactorily, but requires considerable assistance and/or supervision.	
	Mentor will initial level achieved.		

PERFORMANCE STANDARDS	Yes	No	N/A
For acceptable achievement, all items should receive a "Yes" or "N/A" response.			
When verifying the correct customer vehicle information, the learner...			
1. Confirmed with the customer any and all issues needed to verify that a specific RV was owned by the customer.			
2. Verified that the customer was matched to the correct RV.			
3. Searched all four categories of vehicle information.			
4. Obtained all necessary signature authorities to proceed with the warranty work.			
5. Updated customer information on the company records or in the tracking system.			
6. Verified that all needed information was available before beginning warranty work.			

PERFORMANCE TEST (continued)

PERFORMANCE STANDARDS For acceptable achievement, all items should receive a “Yes” or “N/A” response.			
When checking the vehicle’s service history, the learner...			
7. Investigated whether the same repair has been done before to this RV.			
8. Identified the party responsible for payment.			
9. Inspected the vehicle, so that damage and repair situations could be objectively identified.			
10. Checked the paperwork, such as the DAF, to look for less obvious records of previous repairs to a particular vehicle.			

Level of Performance: All items must receive a **YES** or **N/A** response. If any items receive a **NO** response, consult with your mentor to determine what additional activities you need to achieve competency in the weak area(s).

