



### VIII. INITIATE THE DISPATCH PROCESS

- 1) Ensure that all information that you have entered in the **Receiving** screen is correct, and click on the **Dispatch** button. This button ends the **Receiving** process.
- 2) <PROPRIETARY> will display the **Add Tow To Information** window. Note that this is a different process than the Dealer/Agent Search process, on which you may have already been trained. Since CLIENT vehicles will be towed to VMF locations rather than car dealerships, the VMF address or repair facility or post office must be manually entered in this window at this time.

**Vendor/Agent Search**

Locations: ISC State: TX City: CARROLLTON  
Search By: Zip Next State: Next City:  
Veh Type: Special (Requires Flatbed) Phone #: (972) 383-1460  Secondary Tower  
Service: Flatbed Zip: 75006  Tow Sale

**Location**  
Main Street: 3350 BOYINGTON Cross St: X  
City: CARROLLTON State: TX  
Next City: Next State: Call Back #: (972) 383-1460

**Tow-To**  
Location Name: BANKSTON L-M, INC. Type: Dealer  
Address: 4747 LBJ FREEWAY /PO BOX 802227  
City: DALLAS State: TX Zip: 75244 Phone: (972) 233-1441

**Vendor**  
ID / Name: 120286 / STARKS TOWING Contact: GEORGE STARKS  
Day: (214) 351-2408 Night: (214) 351-2408 Fax: (214) 351-2294

**Remarks:**

120286 - STARKS TOWING	Rank/Pri: 2 /	Day: (214) 351-2408
GEORGE STARKS	Distance: 0	Night: (214) 351-2408
9737 BROKBANK	Mfg:	Fax: (214) 351-2294
DALLAS, TX 75220		P&A:
Service Area: CARROLLTON - 75006		Modified By: ortizcar

1 of 2

Reset Issue Cd Attempted Dispatch Rates Search 2 Records Found OK Cancel

Search time in Seconds: 3 Digital Dispatch

- 1) The **Vendor/Agent Search** screen display panel (at the bottom of the screen, with a blue background) will provide a list of vendors based on the information that was entered during the **Receiving** process.



	Receiving process. It should be changed to "Priority" if the person in need of service is not safe.
<b>Id #</b>	Leave this field blank for CLIENT calls.
<b>NonPATS</b>	Normally used to provide a requesting Ford, Lincoln, or Mercury dealership with a vehicle's key code.  This field does not apply to CLIENT.
<b>Year #</b>	Year of vehicle in need of service (4 digits), if known.
<b>Make</b>	Manufacturer of the vehicle in need of service  (e.g., Grumann, Ford, etc.)
<b>Model</b>	Model of the vehicle in need of service  (e.g., LLV, Aerostar)
<b>Cert.</b>	Indicates the type of certification a dealership must have to repair the vehicle in need of service.  This field does not apply to CLIENT.
<b>Color</b>	The main color of the vehicle in need of service.
<b>Type</b>	Indicates the type of truck or equipment needed to tow, lift, or winch the vehicle in need of service.  This will usually auto-populate with Light Duty or Special (Requires Flatbed).
<b>Plate #</b>	Enter the CLIENT 7-digit vehicle #.
<b>RV Info</b>	VMF Fed Strip # requesting service.
<b>Service</b>	The type of service needed for the disabled vehicle.  Below are the roadside assistance services provided as a benefit for most memberships: <ul style="list-style-type: none"> <li>• Tire Service</li> <li>• Battery Jump Start</li> <li>• Gas/Fluid Delivery</li> <li>• Flatbed</li> <li>• Lockout</li> <li>• Towing</li> <li>• Winching</li> </ul>



- 3) To follow is a table that describes the information located in each field of the **Receiving** screen. There are descriptions of information which auto-populate, as well as descriptions of the information you are required to enter on each call. In time, you will become very familiar with the information you must collect, and the correct field in which to document it. In the meantime, refer to these descriptions.

Fields that allow you to enter or select data appear in **blue text**:

Field/Button	Description or Purpose
<b>Account</b>	The name associated with the account.
<b>Program</b>	Lists the program number and program name that is assigned to the account.
<b>Benefit Amt</b>	The member's coverage limit. Any amount over this limit for roadside assistance is the member's responsibility.  FAV and LAV memberships will display the amount \$9999.99 in this field. This indicates that the member is covered in full for service calls (non-tows), and covered for a tow to the nearest VMF or another authorized CLIENT service location.
<b>RCV</b>	The <PROPRIETARY> sign-on ID of the CSR who received the call.
<b>Contact Date</b>	The date and time the Receiving screen was opened.
<b>ET RCV</b>	Stands for "Elapsed Time Receiving". The time it took to complete the receiving screen.
<b>Last/First</b>	This field will auto-populate with the name of the member. Be sure to change to the name to the CLIENT person who is calling and requesting service.
<b>Call Back #</b>	The number where the caller can be reached.
<b>Safe Location</b>	Indicates that the person in need of service is safe.
<b>Mbr w/Car</b>	Indicates that the person in need of service is with the vehicle. <b>NOTE: If a CLIENT/government employee is not going to remain with the disabled vehicle, you will only be able to dispatch the security-approved CLIENT Shuttle towing vendor for that area.</b>
<b>Odometer</b>	The number of miles on the vehicle, if known.
<b>Mbr ETA</b>	If there is no one with the vehicle, this field indicates how long it will take them to get back to the vehicle.
<b># in Car</b>	The number of people with the vehicle at the time service is needed.
<b>Call From Loc</b>	The type of phone the caller is using. For CLIENT, use <b>Office</b> (the caller's workplace)
<b>Call Back</b>	Indicates reasons for later calls back regarding the service request.  This field should almost always be left as "Normal" during the



## 2) Receiving Screen Overview:

Add Assistance Request	
<b>Account</b>	<b>Program</b>
* USPS ERS	1105 - USPS ERS
Benefit Amt: 9,999.99	RCV: pacejeff
Contact Date: 08/13/07 09:36	ET RCV: 00:01
Last / First: USPS ERS / *	
Call Back #: [ ] [ ] [ ] x [ ]	
Safe Location: <input type="checkbox"/> Mbr w/Car: <input type="checkbox"/>	
Odometer: [ ] 0	Mbr ETA: [ ]
# in Car: [ ]	
Call From Loc: [ ]	
Call Back: Normal	
<b>Vehicle</b>	
Id #: [ ]	
Year #: [ ]	Make: [ ]
Model: [ ]	Cert. [ ]
Color: [ ]	
Type: [ ]	
Plate #: [ ]	State: TX
RV Info: [ ]	
Service: [ ]	
<b>Location</b>	
Main Street: [ ]	Cross St: [ ]
City: [ ]	State: [ ]
Next City: [ ]	Next State: [ ]
Landmark: [ ]	Country: USA
Direction: [ ]	On/Off Ramp: <input type="checkbox"/>
Location: [ ]	Call Box: [ ]
	Highway/Mile Marker: [ ] / [ ]
Issue Cd	Dispatch
Search	Tow To
Comments	RAS History
Suspend	Disp Req
Cancel	



- ii. Enter the **CLIENT membership number: 129984016**.  
Click on the **Search** button at the bottom of the window, and the basic contract information regarding CLIENT Emergency Roadside Service will appear in the **Display a Customer** window.
- iii. It is not necessary, but if you prefer to see a summary of the information on the **Display a Customer** screen, click on **OK** to go back to the **Select a Customer** screen:

Instead of searching for the Membership by the 9-digit <PROPRIETARY> #, use this alternative search method:

**B. Last Name/First Name/Zip:**

- i. On the **Select a Customer** screen, highlight the **Search Type** field and press **<L>** on your keyboard. Move to the **Last Name** field by pressing the **<Tab>** button.
- ii. In the Last Name field, type **CLIENT ERS** and click on the **Search** button at the bottom of the window.

## **VII. ROADSIDE ASSISTANCE RECEIVING**

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Combined, Receiving and Dispatching consist of five basic phases. The first two phases make up the Receiving process:

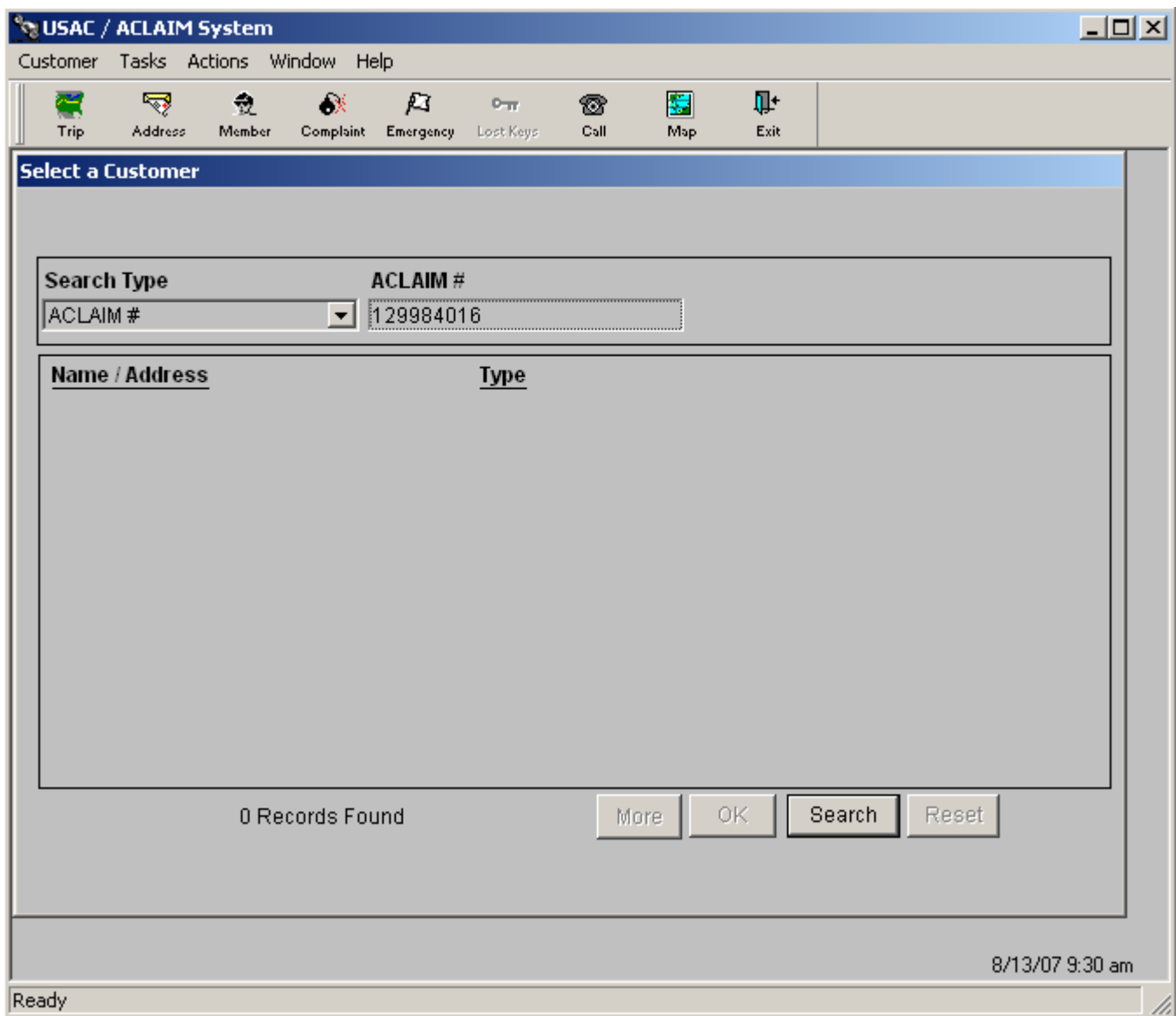
- Obtain the Customer information from CLIENT and document all the necessary information for completing the Receiving screen in <PROPRIETARY>
- Identify and document the Tow-to, or VMF location

1) **Open RAS / Receiving Screen:**

After finding the CLIENT ERS **Membership Record** in the **Select a Customer** screen, press **< F2 >** on your keyboard which will open the **Add Assistance Request** screen. The Add Assistance Request screen is commonly referred to as the Receiving screen.



- 3) There are eight available **Search Types** in <PROPRIETARY>; however, for the purposes of **CLIENT**, there are just two primary Search Types. Choose one:
  - A. <PROPRIETARY> #:
    - i. On the **Select a Customer** screen, highlight the **Search Type** field and press <A> on your keyboard. Move to the <PROPRIETARY> # field by pressing the <Tab> button.





## V. SIGN OFF FROM <PROPRIETARY>

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- 1) Complete the following steps to sign off the <PROPRIETARY> system:
  - Click the **Exit** icon, **or**
  - Click **Customer**, then **Exit**, **or**
  - Press **< Alt > + < C > + < X >**.

## VI. BEGIN THE RAS PROCESS / SEARCHING FOR A MEMBERSHIP

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- 1) When a CLIENT vehicle breaks down and a VMF staff member contacts our center, you will first access the CLIENT ERS **Membership Record** in <PROPRIETARY> before moving forward with dispatching an ISC for roadside assistance.

In order to provide the best possible service to our Customer, however, please remember the following:

- **Greeting:** Please offer the standard greeting when answering the dedicated CLIENT toll free number: “Good morning/afternoon/evening, thank you for calling, my name is (your name), how may I help you?”
  - **Establish Call Control:** Try to take control of the call so that you can provide CLIENT with the most efficient and highest quality level of service. Let CLIENT know that you are there to assist them to the best of your ability, using all available resources.
- 2) The base screen in <PROPRIETARY> is the **Select a Customer** screen. This screen serves as the doorway to all Customer Service related functions in the <PROPRIETARY> system. Among the different features that can be accessed from this screen, the main function is searching for and displaying membership records. This screen will allow you to search for membership records in a variety of ways, and will also list all the memberships that are retrieved from a search.
    - A. **Search:** the Search button is used to execute a search after search criteria has been entered.
    - B. **Reset:** the Reset button is used to clear the screen following a membership search.



- **Tow To** is the field that explains where the car is being towed.
- **Vehicle Maintenance Facility (VMF)** is the location to which the CLIENT delivery trucks are transported for routine maintenance or repairs.
- **Vendor** is the term used to refer to all tow services and locksmiths, both contracted and non-contracted with XYZ COMPANY.

#### IV. SIGN ON TO <PROPRIETARY>

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- 1) The <PROPRIETARY> system is located under the **Start → Programs → <PROPRIETARY>**. This can be accessed at any point after you have logged on to the network and the desktop has appeared on your computer.
- 2) Your user name will be created using a combination of letters from your first and last name.

Enter your **<PROPRIETARY> ID** and **Password** in the appropriate fields. Press **<Tab>** to move your cursor between these two fields.

Click **OK** or press **<Enter>**.

- 3) If the <PROPRIETARY> system prompts you to change your password, follow these steps:
  - A. Enter old password.
  - B. Press **< Tab >**.
  - C. Enter your new password adhering to the following rules:
    - Must not be the word “<PROPRIETARY>.”
    - Must not be the same as the User ID.
    - Must be 6-8 characters and consist of mixed alphabetic and numeric characters.
    - Must have at least one alphabetic and one numeric character and contain no blank spaces.
    - Must not be one of your previous 6 passwords.
- 4) Press **< Tab >**.
- 5) Re-enter new password.
- 6) Click **OK**, press **< Alt > + < O >**, or press **< Enter >**.
- 7) Enter your phone extension in “CSR Extension” box and Click **OK**.  
Proceed to [Opening the Home Page](#)

<p><b>NOTE:</b> Please notify your Supervisor if (1) &lt;PROPRIETARY&gt; system warns you your password has been locked out, or (2) &lt;PROPRIETARY&gt; system does not open or returns</p>
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### III. KEY TERMS

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- **<PROPRIETARY>** is XYZ COMPANY's proprietary system developed for receiving and dispatching road service calls. <PROPRIETARY> is the acronym for Auto Club Automated Information Management System. The system will enable you to receive and dispatch towing requests for CLIENT.
- **Comments** is the area in <PROPRIETARY> which houses pertinent information about the call that is not already documented on the Receiving or Dispatch screens, or in the Issue Codes.
- **Dispatching** refers to the process of searching for and locating a service provider that can and is willing to provide service for the member, and authorizing the service provider to perform service.
- **Dispatch button** ends the receiving process. Make sure that all information on the Receiving screen is correct before pressing this button.
- **Dispatch Miles** refers to the distance an ISC or vendor travels to arrive at the disabled vehicle's location.
- **ETA** is the acronym for "Estimated Time of Arrival."
- **Independent Service Contractor (ISC)** is the acronym used to refer to all contracted tow services and locksmiths that assist XYZ COMPANY members in need of roadside assistance.
- **Issue Code** is the field in <PROPRIETARY> that explains what is wrong with the member's vehicle.
- **Loaded Miles** are defined as the distance between the breakdown location of the disabled vehicle and the tow-to destination.
- **THE SYSTEM** is XYZ COMPANY's proprietary system and online portal for users of the Shuttling Service.
- **Recapping** is the process used to verify that all the information obtained from the member was documented correctly.
- **Receiving** refers to the process of answering the initial call for roadside assistance, recording the information about where the member is and exactly what type of service is needed.
- **Roadside Assistance (RAS)** is where all the necessary information about the member, the vehicle, the vehicle location, and the type of assistance needed are recorded in <PROPRIETARY>.
- **Total Call Ownership** XYZ COMPANY has adopted a policy of 'Total Call Ownership'. This means that from the time the member calls you for service, until the time that service has been arranged, the completion of the call is the responsibility of the person who received it.



## Roadside Assistance for <CLIENT>

*Call Center Representative Training Manual  
August 2007*

### I. PROGRAM OVERVIEW

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To complement the Shuttle Service program, XYZ COMPANY has incorporated Roadside Assistance into the suite of service offerings for CLIENT.

As a Shuttle Service Representative, you have been trained on the system to facilitate *scheduled* shuttle events to and from the VMF facilities so that routine maintenance of CLIENT vehicles can be performed. Now, VMF personnel will also contact our center via 1-888-555-4000 if a CLIENT vehicle breaks down while on its delivery route and requires roadside assistance, similar to that which XYZ COMPANY already offers to consumers.

Providing Roadside Assistance for CLIENT is a two-part process. The first step is called Receiving, and the second step is called Dispatching. Both processes are in the <PROPRIETARY> system, and will remain separate from the System at this time.

### II. OBJECTIVES

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Page 3: Learn to [Sign On](#) to, and [Sign Off from <PROPRIETARY>](#).

Page 4: [Search for a Membership](#)

Page 8: Become aware of the [information required to Receive a Roadside Assistance call](#), and the overall CLIENT Roadside Assistance Receiving process

Page 14: [Initiate the Dispatch process](#)

Page 15: Understand the importance of the [Recapping](#) process

Page 16: [Search for and Dispatch a Towing Vendor](#)

Page 19: [Contact the Preferred ISC / Towing Vendor](#)

Page 22: [Generate a P.O. \(Purchase Order\)](#)

Page 23: [Document the Call](#)

Page 27: Review the [Preferred CLIENT ISCs / Towing Vendors](#)