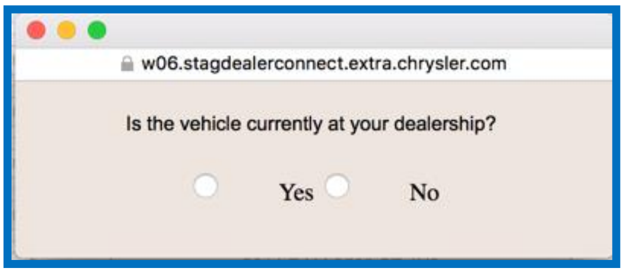
Creating and Submitting a New Case in 5 Steps

STEP 1a: Indicate whether car is currently at the dealership.

- Dealer Technicians initiate Cherwell cases directly within Service Library by submitting a request for technical assistance to STAR, as described in section titled "Logging In/Contacting STAR Center." When selecting 'Create Case' from technical assistance options, the user may be prompted with a question as to whether the car is at the Dealership.
    - Select **Yes** or **No** button to continue.



- Next, a case entry screen is presented with four sections needing to be filled out: 1) Your Information, 2) Vehicle Information, 3) Repair Information, and 4) Review/Submit. (See Steps 2-5 for details.)

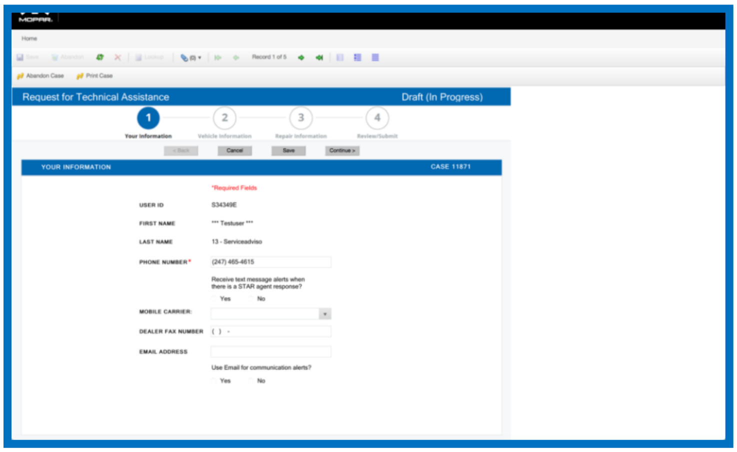
STEP 1b: Abandon or edit existing cases IF error message indicates maximum open cases has been reached.

- At times a user may receive a banner message in Service Library, indicating a case could not be created because the maximum number of open cases and incomplete surveys has been exceeded.
    - When this happens, the user should select '**Existing Cases**' from Service Library options (instead of 'Create Case').
    - Doing so will launch the "Existing Cases" dashboard in Cherwell where a user can select draft cases to abandon them or continue cases that have already been started.
    - Abandoning unnecessary drafts frees up space for a technician to create new cases if the limit has been reached.
    - Completing incomplete surveys can also help avoid this error message.
- If a user did not reach the maximum case load limit, there will be no error message and the user will move straight to Steps 2-5.

STEP 2: Complete "Your Information" section.

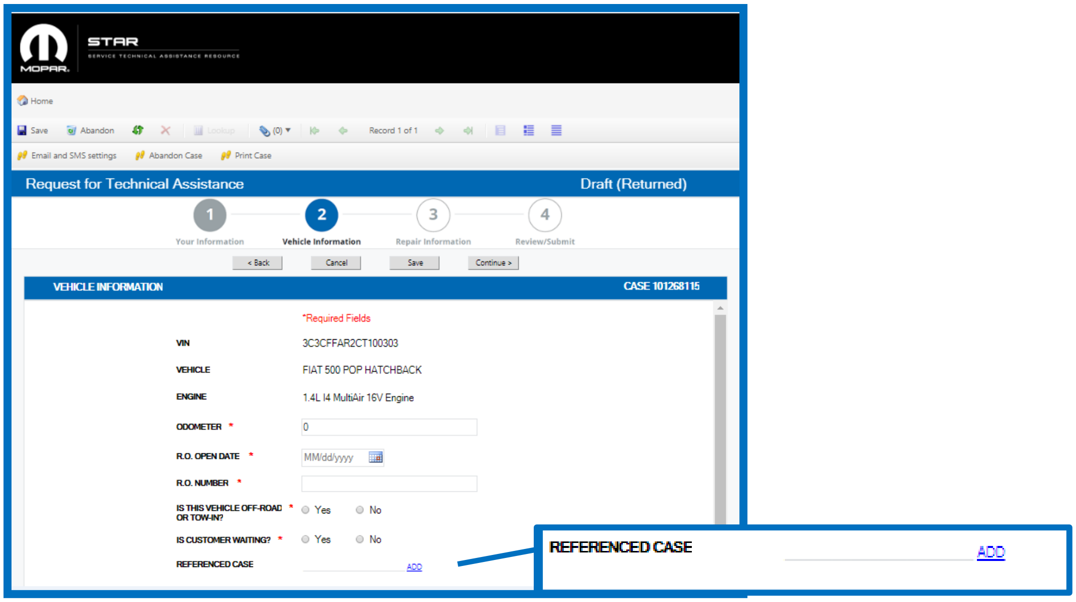
- In the case entry section titled "Your Information," the system has pre-filled the User ID, First Name, Last Name, and Phone Number of the Dealership.
- The Dealer Technician can update the phone number, if required, and select if they wish to receive text message alerts or email communication.

    - If selecting ‘Yes’ for text message alerts, the appropriate mobile carrier must be entered.
    - If selecting ‘Yes’ to email option, user will be prompted to enter their email address.
- The navigation on this screen is driven by the ‘Cancel,’ ‘Save,’ and ‘Continue’ buttons toward the top of the screen design.
    - To navigate to the next screen, the Dealer Technician presses the ‘Continue’ button.
    - ‘Save’ will save the case as a draft and allow a Technician to return to it later in the “My Draft Cases” queue from the main dashboard.
    - ‘Cancel’ will cancel any recent changes to the case, but still allow the Technician to return to the case later.
        - Users can return to saved or canceled cases from “My Draft Cases” queue in the main dashboard.



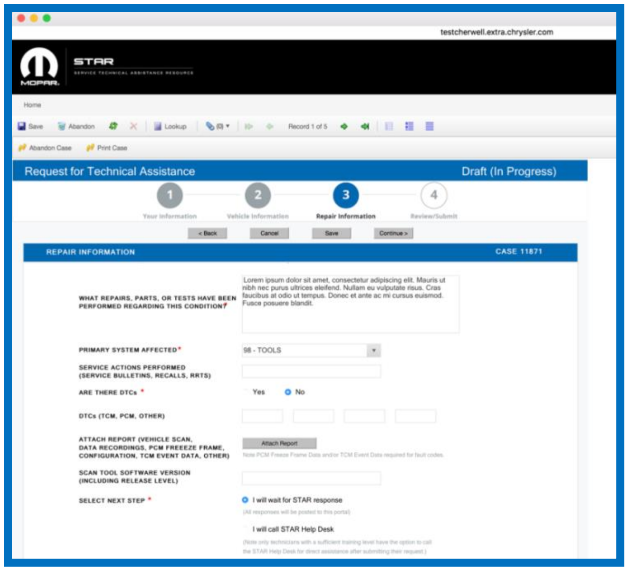
STEP 3: Complete “Vehicle Information” section.

- The second case entry screen prompts for “Vehicle Information.” The system remembers the VIN search that was completed in Service Library and auto-populates the information previously provided (e.g., VIN, Vehicle, and Engine fields).
- The Dealer Technician completes the remaining fields, including Odometer, RO Open date, RO number, whether the vehicle is off-road, and whether the customer is waiting.
- A technician can provide details for a previous case by selecting the ‘ADD’ link next to **Referenced Case**. When selected, a pop-up window will appear, and the referenced case should be selected from the list.
    - At this time, only one referenced case can be added for this action.
- Once these fields are complete, the Dealer Technician clicks the ‘Continue’ button at the top of the screen design.
    - Selecting the ‘Back’ button allows user to return to the previous screen.



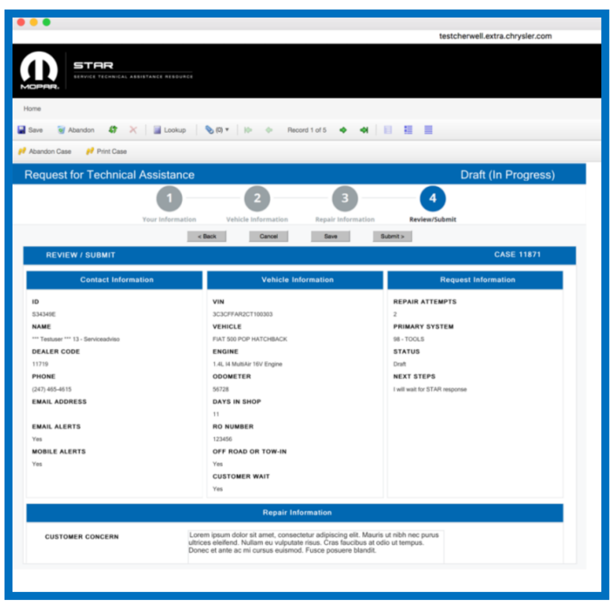
STEP 4: Complete "Repair Information" section.

- The third case entry screen prompts "Repair Information," and depending upon the options selected, additional screens may be added in the process to gather additional information.
- At a minimum, the system prompts the Dealer Technician to add the following information:
  - Number of Repair Attempts
  - Customer Concern
  - Can customer concern be duplicated? (Yes/No)
  - What conditions are required to duplicate concern?
  - Is it an NVH Issue? (If the answer is 'Yes,' an additional diagnostic sheet is added to the case enrollment.)
  - What Repairs and Parts have been performed?
  - Primary System Impacted (Clutch, AV/Telematics, Engine, Vehicle Performance, Manual Trans, Emission Control)
  - Service Actions Performed
  - Are there DTCs? (If answered 'Yes,' the Reports are prompted to be attached.)
  - Scan Tool Software Version
- Select "Attach Report" button (in case entry screen) to attach files to the case as needed.
- When complete, go to **Select Next Step** to document next actions (e.g., "Wait for callback" or "Will call STAR.")



STEP 5: Complete "Review/Submit" section and submit case.

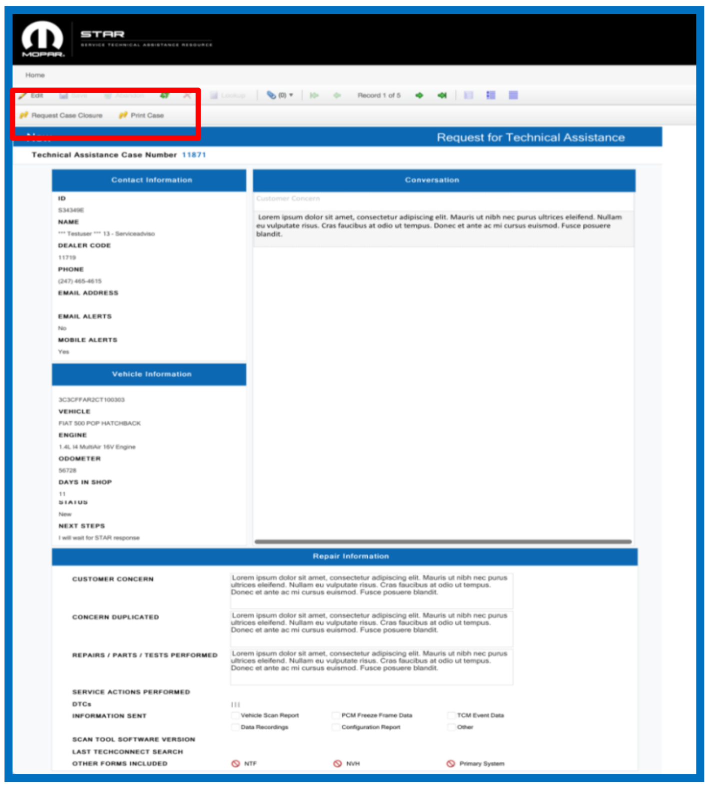
- Dealer Technician is presented with a fourth section, the "Review/Submit."
  - The 'Back' button returns user to previous screen(s) to make changes to previous entries.
  - 'Cancel' discards any recent changes, but still saves the case as a draft (allowing user to return to it) without submitting to STAR.
  - 'Save' will save the case as a draft allowing user to return to it without yet submitting to STAR.



- At this stage, a Dealer Technician has an option to 'Abandon Case' or 'Print Case.'
  - Selecting 'Abandon Case' will set the case draft to "Closed – Abandoned" for auditing purposes, but the case will disappear from the recently closed queue on the portal and will not be submitted to STAR Agents.
  - Selecting 'Print Case' allows the user to print the details of the case prior to submission. (This option is also available post-submission.)

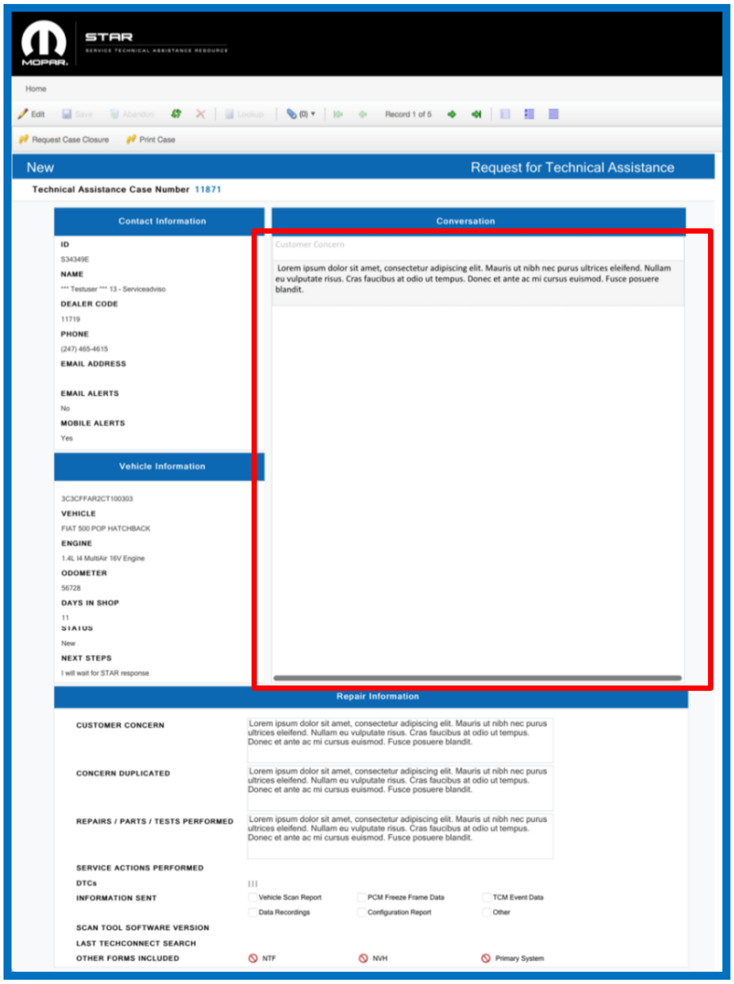
- If everything appears in order, the **Submit** button can be chosen to proceed with case submission.
- Once **Submit** button is selected, the system provides the user with a confirmation that the case has been successfully submitted.

- Upon clicking **OK**, the Dealer Technician is presented with a case summary.



- From here a Technician can click 'Edit' to add additional information as conversation.
- The options 'Request Case Closure' and 'Print Case' are also available from this interface.
  - 'Request Case Closure' notifies the STAR Agent that the case can be resolved and will prompt the Dealer Technician to complete a survey.
  - **Important:** Prior to selecting "Request Case Closure," Technician must enter vehicle resolution in **Conversation Notes**.
- Updates to the 'Conversation' box can be viewed in the central part of the case summary. At this point the case will have already entered the STAR queue and will be picked up by a STAR Agent.

- From the Case Summary page, selecting the Home button will direct user to his/her main dashboard.



- The paperclip icon in the Case Actions Toolbar is used to add attachments after a case has already been submitted to STAR. This icon is also where users can find attachments from STAR.
    - There is no limit to the number of attachments to a case, nor file size.
    - Any file types are permitted within the application, with the exception of the following:

      app, application, asp, aspx, bat, cab, cer, cgi, cmd, com, cpl, crt, dll, dmg, docm, dotm, drv, exe, gadget, hlp, hta, htm, html, inf, ins, iso, isp, jar, js, jsb, jse, lnk, mht, mhtml, msc, msh, msh1, msh1xml, msh2, msh2xml, mshxml, msi, msp, pif, pl, potm, ppam, ppsm, pptm, ps1, ps1xml, ps2, ps2xml, psc1, psc2, py, reg, scf, scr, shs, sldm, sys, toast, vb, vbe, vbs, vxd, ws, wsc, wsf, wsh, xht, xhtml, xlam, xlsm, xltm.