

2018-  
2019

FCA STAR CENTER:  
CHERWELL  
APPLICATION

Navigation Manual for  
Dealers

# [CHERWELL NAVIGATION AND CASE MANAGEMENT FOR DEALERS]

A Guide for Optimal Dealership Performance – Updated 5/21/2019

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## 1. Purpose of the Document

- The purpose of this document is to introduce Dealership Technicians and Service Managers to the Cherwell application features and functions as a means of successfully navigating FCA's newest Case Management System (CMS).

## 2. Welcome to Cherwell

- Major differences in Cherwell that are designed to improve STAR Center performance and dealership satisfaction include:
  - Enhanced technology and business solutions that make it easier and faster to submit requests for technical assistance and receive feedback from STAR Center.
  - Required forms are now embedded in the case creation process. Technicians will be prompted to complete any forms necessary while they are creating their case to submit to STAR.
  - Customized Technician Dashboard makes it easier to attend to cases.
  - Technicians create and submit cases (instead of tickets) bringing all Cherwell users into a single system.

## 3. Terminology

*The following new terminology will lead to a clearer understanding of Cherwell's dashboards and the [case management process](#).*

- **Dashboard:** Term used to describe the Home page that houses a Dealer Technician's cases.
- **Draft:** If a Technician is not ready to send a case to STAR for any reason, s/he can save any information entered for a vehicle as a "Draft." When ready, the Technician can return to the draft for completion and send it to STAR for technical assistance. (*Also see [My Draft Cases](#).*)
- **Draft (Abandoned):** The Technician can abandon a draft case. This option is only available to the Technician before the case has been submitted to STAR. (This is not available for CAC or Reopened cases.)
- **Draft (Returned):** When a Technician has submitted a case to the incorrect Primary System (PS), or when the submission is incomplete and an Agent returns the case to a Technician, it will be assigned this status in the Technician's draft queue. For reporting purposes, details of who returned the case will be captured. (*Also see [My Returned Cases](#).*)
- **Unassigned Cases Submitted to STAR:** Cases that have been submitted to STAR but are not yet assigned to a STAR Agent are provided this designation.
- **Cases Being Worked On By Agent:** Cases that have been submitted to STAR and have been assigned to a STAR Agent (currently working the case) are provided this designation.
- **Cases Closed Within Last Year:** Displays cases that have been closed within the year that can be reviewed. Only cases closed within the past 15 days can be reopened.

- **My Draft Cases:** These are cases that have been initiated by a Dealership Technician, but have NOT yet been submitted to STAR Center for technical support.
- **My Returned Cases:** Cases that have been submitted to STAR Center, but are missing or have incomplete information will be returned to Dealership Technicians to complete and resubmit. These cases are not being worked on by STAR Agents and no technical support will be provided until the case submission is corrected and resubmitted.
- **Open Cases I Need To Work On:** These are cases that have been submitted to STAR, worked on by an Agent, and have been passed back to the Dealership Technician for next action(s).
- **Open Surveys:** Whenever a Dealer Technician requests a case closure, s/he is automatically taken to a survey. When a STAR Agent closes a case, the survey will appear in the Technician's Dashboard and will require completion. The survey will remain in "Open" status until completed.
- **Completed Surveys:** After a Dealer Technician has completed a survey related to a technical assistance experience, the survey will appear in this queue in their main dashboard.
- **Baton/Baton Pass:** Terminology used to identify transition of responsibility for case handling. Cases with a "T" mean the technician holds responsibility, while cases with an "A" mean Agent holds responsibility. When the baton holder changes, next action and responsibility for the case is with the current baton holder.
- **On Hold Case:** An Agent might receive a call, or may need to attend to some other duty when s/he has already begun working a case. In this situation, the Agent can place the case on hold and return to it at a later time. The Technician will see case status as "On Hold" when this happens. However, the dealer can edit the case while it is on hold at STAR.
- **Closed Case (Resolved):** This is a designation for cases worked that result in a resolution for the customer concern.
- **Closed Case (Unresolved):** This designation is reserved for cases with vehicle issues specified by engineering as having a known and unresolved issue. After a case is assigned the Closed (Unresolved) status, it will be eliminated from both Agent and Technician queues.
- **Closed (Dealer Unresponsive):** This designation indicates the Technician did not respond to a STAR Agent's "Pass to Dealership" action within the established two-business-day (excluding Saturdays) time requirement, resulting in an automatic case closure.
- **Reopened Case:** Any closed case—Closed (Resolved), Closed (Unresolved), or Closed (Dealer Unresponsive)—can be reopened by the Dealership within 15 days of its close. Abandoned cases cannot be reopened. If the Technician chooses a case from the Closed Cases queue, the case goes into Draft status until it is submitted.

## 4. Dealer Technician Case Management

**Case Management** is the process for managing the lifecycle of all the cases logged within the Cherwell application. Case management is designed to log, track and manage the activities associated with providing dealership personnel with the support required to resolve their technical questions and issues.

This section describes the case management process for Dealership Technicians, including launching Cherwell by initiating a request for technical assistance with STAR (4.1), creating a new case (4.2), understanding the Dealer Technician Dashboard (4.3), managing existing cases (4.4), and communicating with STAR Center Agents to fix vehicle concerns (4.5).

### 4.1 Contacting STAR Center

4.1.1 For full functionality of Cherwell application, use **Internet Explorer**.

4.1.2 Dealer Technicians initiate Cherwell cases, either new or existing, directly from [Service Library](#) via requests for STAR technical assistance.

- To access Service Library, users must first log in to DealerCONNECT via the following link: <https://dealerconnect.chrysler.com/> (Fig. 1).

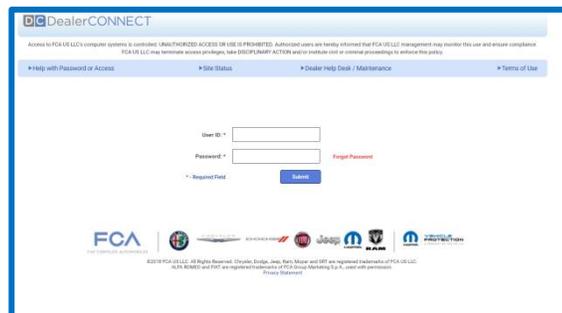


Fig. 1: DealerCONNECT Login Screen

4.1.2.1 The following are instructions for accessing Cherwell via Service Library:

- When in DealerCONNECT, navigate to **Service** tab, and then select **Service Library** link.

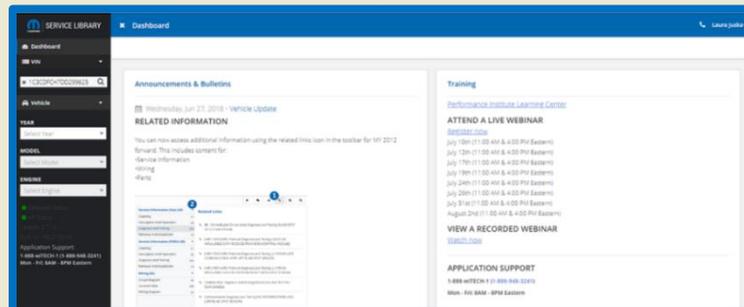


Fig. 2: Service Library Dashboard

- Technicians use Service Library (service information portal) to research technical issues, review wiring diagrams, and attempt vehicle diagnosis before reaching out to STAR for technical support.
  - Vehicle research by VIN is required prior to contacting STAR for support.
- To contact STAR Center when other resources are exhausted and technical assistance is required, or to review or update existing cases with STAR, click **Contact STAR** button (see Figs. 3 and 4) from the following two locations in Service Library:
  - **Option 1— Top-right of screen (next to username):** Choose either **Create Case** (if creating new), or **Existing Cases** (if searching/updating previous case).



Fig. 3: Contact STAR Center Button (Service Library, Top-Right Location)

- **Option 2— From left panel:** Click **Create Case** (if creating new) or **Existing Cases** (if searching/updating previous case).



Fig. 4: Contact STAR Center Button (Service Library, Left Panel - Bottom)

- When selecting **Create Case**, a 'Contact STAR Center' prompt will appear with vehicle Year, Model, Engine and VIN. If information is accurate, select **Start Case** to continue to case entry screen. (See details in section [4.2 - Creating a New Case.](#))

Fig. 5: Contact STAR Center Prompt

- Note: At times, a user may receive a banner message in Service Library stating that a new case could not be created because the maximum number of open cases and incomplete surveys has been reached. If this happens, he/she should either: 1) Select 'Existing Cases' option in Service Library and edit/submit draft cases, or abandon drafts no longer needed; or 2) Complete and submit incomplete surveys. Either of these actions will free up space in the system to allow new case creations.
  
- If selecting **Existing Cases** from Service Library options, users will be directed to their main dashboard in Cherwell. Instructions associated with existing cases are described in section [4.3 – Managing an Existing Case](#).

## 4.2 Creating a New Case

Dealer Technicians initiate Cherwell cases directly within Service Library by submitting a request for technical assistance to STAR, as described in section [4.1](#). The following section describes actions taken by a Dealer Technician to create a new case.

- 4.2.1 Once a new request for technical assistance to STAR has been initiated, the Dealer Technician is prompted as to whether the car is at the Dealership (Fig. 6). Select **Yes** or **No** button to continue.

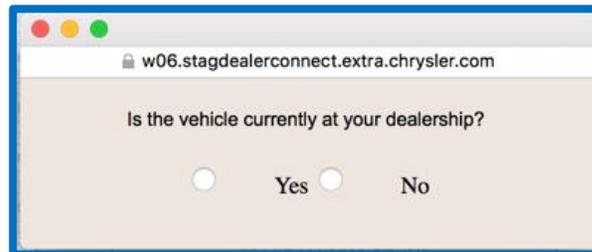


Fig. 6: Vehicle at Dealership Prompt

- 4.2.2 The Dealer Technician is then presented with a case entry screen with four sections needing to be filled out: 1) Your Information, 2) Vehicle Information, 3) Repair Information, and 4) Review/Submit. (These are described in sections 4.2.3.1- 4.2.3.4).
- 4.2.3 In the event a technician receives 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, the user should either: 1) Select 'Existing Cases' option in Service Library and edit/submit draft cases, or abandon drafts no longer needed; or 2) Complete and submit incomplete surveys. Doing so will create space in the system to allow new case creations.

### 4.2.3.1 Section 1 – Your Information

- In the section titled "Your Information" (Fig. 7), 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 e-mail communication.
  - If selecting 'Yes' for text message alerts, the appropriate mobile carrier must be entered.
  - If selecting 'Yes' to e-mail option, user will be prompted to enter their email address.
- The navigation on this screen is driven by the 'Cancel' and '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 at a later time in the My Drafts queue from the main dashboard.
  - 'Cancel' will cancel any recent changes to the case, but allow the Technician to return to it at a later time
    - Users can return to saved or canceled cases from **My Draft Cases** queue in the dashboard.

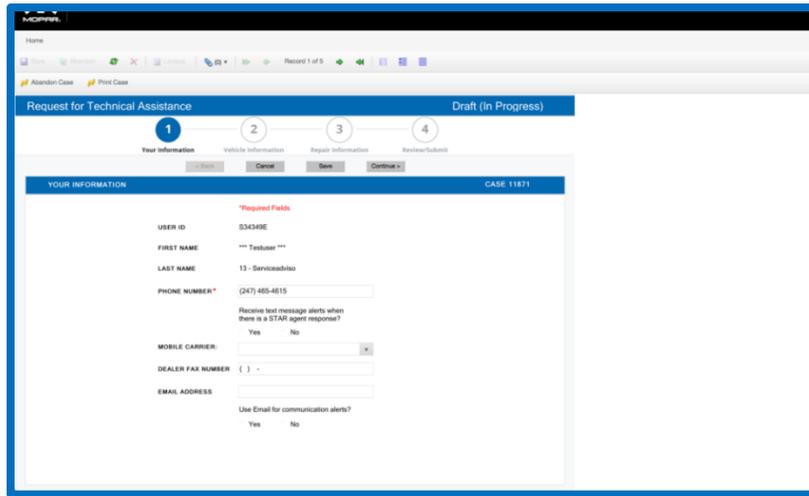


Fig. 7: "Your Information" Case Entry Screen

#### 4.2.3.2 Section 2 – Vehicle Information

- The second screen prompts for "Vehicle Information" (Fig. 7). 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** (shown in Fig. 8). 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.

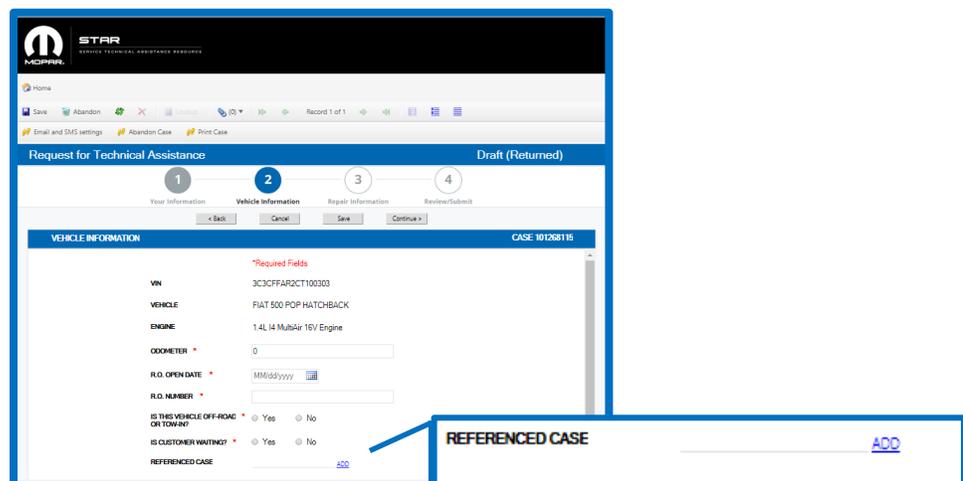


Fig. 8: "Vehicle Information" Case Entry Screen

#### 4.2.3.3 Section 3 – Repair Information

- The third screen prompts “Repair Information” (Fig. 9), 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.
  - [See 4.2.4-4.2.5](#) for more information about attachments.
- When complete, go to **Select Next Step** to document next actions (e.g., “Wait for callback” or “Will call STAR.”)

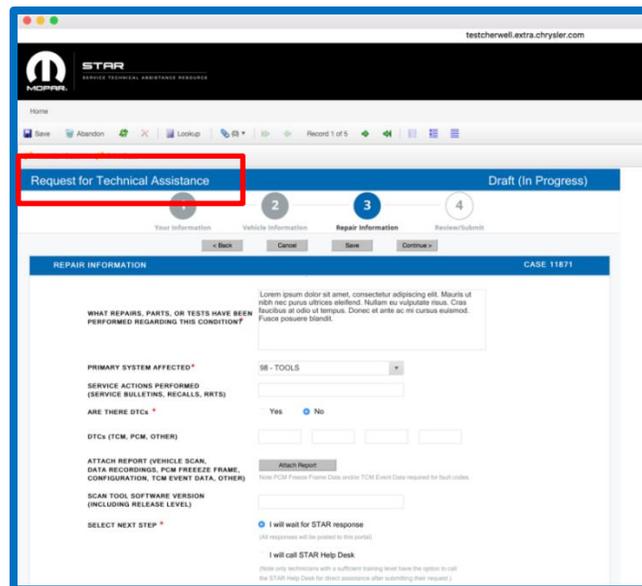
The screenshot shows a web browser window displaying the STAR Case Entry Screen. The browser address bar shows 'testcherwell.extra.chrysler.com'. The page has a navigation bar with a 'Request for Technical Assistance' button highlighted by a red box. Below the navigation bar, there are four numbered steps: 1 (Your Information), 2 (Vehicle Information), 3 (Repair Information), and 4 (Review/Submit). The 'Repair Information' section is active and contains several form fields: 'WHAT REPAIRS, PARTS, OR TESTS HAVE BEEN PERFORMED REGARDING THIS CONDITION?' (with a text area), 'PRIMARY SYSTEM AFFECTED\*' (with a dropdown menu), 'SERVICE ACTIONS PERFORMED (SERVICE BULLETIN, RECALLS, RRTS)' (with a text area), 'ARE THERE DTCs \*' (with Yes/No radio buttons), 'DTCs (TCM, PCM, OTHER)' (with text input fields), 'ATTACH REPORT (VEHICLE SCAN, DATA RECORDINGS, PCM FREEZE FRAME, CONFIGURATION, TCM EVENT DATA, OTHER)' (with an 'Attach Report' button), 'SCAN TOOL SOFTWARE VERSION (INCLUDING RELEASE LEVEL)' (with a text input field), and 'SELECT NEXT STEP \*' (with radio buttons for 'I will wait for STAR response' and 'I will call STAR Help Desk'). The page also includes a 'Draft (In Progress)' indicator and a 'CASE 11871' label.

Fig. 9: “Repair Information” Case Entry Screen

#### 4.2.3.4 Section 4 - Review/Submit

- Dealer Technician is presented with a fourth section, the “Review/Submit” page (Fig. 10).
  - The ‘Back’ button returns user to previous screen(s) to make changes to previous entries.
  - ‘Cancel’ discards any recent changes, but 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.

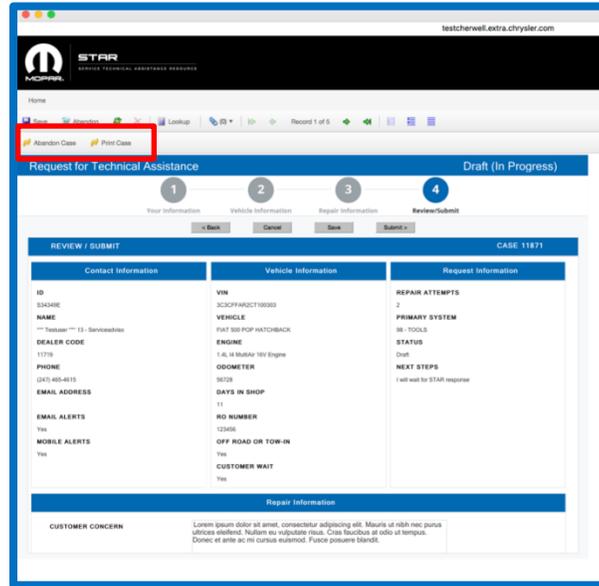


Figure 10: "Review/Submit" Case Entry Screen

- At this stage, a Dealer Technician has an option to 'Abandon Case' or 'Print Case' (red box, Fig. 9).
  - 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 (Fig. 11).

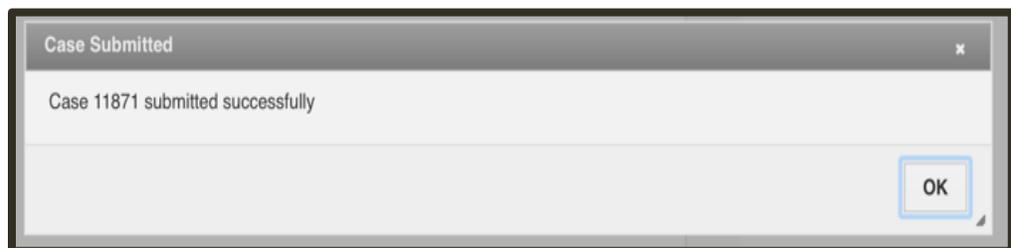


Figure 11: Case Submission Dialogue Box

- Upon clicking **OK**, the Dealer Technician is presented with a case summary (Fig. 12).

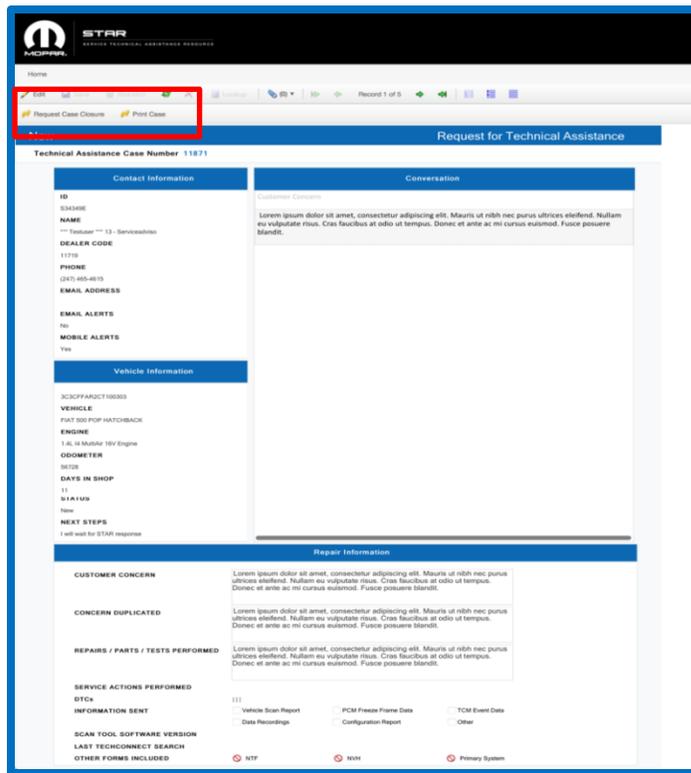


Figure 12: Case Summary Page

- 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 (red box, Fig. 13).
  - '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 (Fig. 12). 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.

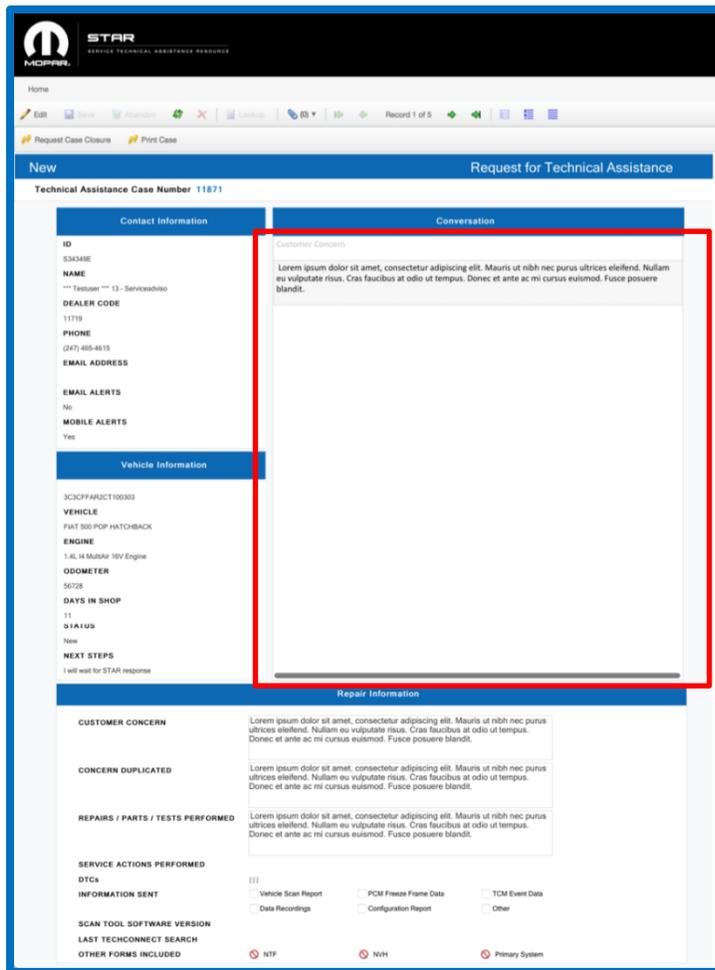


Figure 13: Dealer Technician Conversation View

- 4.2.4 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.
- 4.2.5 There is no limit to the number of attachments to a case, nor file size.
- 4.2.6 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, xlsx, xltm.

## 4.3 Managing an Existing Case

The following section describes actions taken by a Dealer Technician in order to review or add to existing cases in Cherwell.

4.3.1 Dealer Technicians manage previously created cases in Cherwell by accessing [Service Library](#).

### 4.3.1.1 To manage previously created cases in Cherwell via Service Library:

- Log in to DealerCONNECT
- From the **Service** tab, select **Service Library** link
- Once in Service Library, click “Contact STAR Center” button (telephone icon) on top-right of screen
- Select **Existing Cases**
- User will be directed to the main dashboard in Cherwell where existing cases can be searched and reviewed

4.3.2 The Dealer Technician can click on any of the records or summary numbers in Cherwell to be taken to an existing case or queue.

4.3.3 Upon selecting a case/case number, Technician will be directed to a Case Summary page.

4.3.4 Any case can be updated by clicking ‘Edit’ button on the Case Summary page (red circle, Fig. 14).

4.3.5 Selecting ‘Abandon Case’ button cancels an existing case, even in draft phase (red box, Fig. 14).

4.3.5.1 Abandoning a case removes unnecessary cases or drafts from a technician’s queue, thereby freeing up space for new cases to be created.

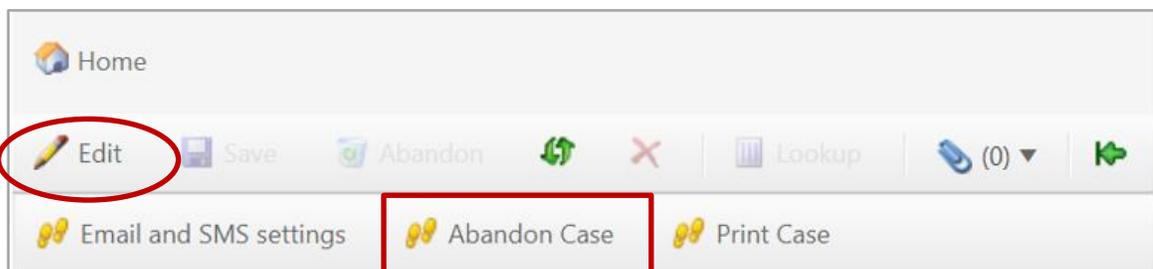


Figure 14: Edit Case and Abandon Case Buttons on Case Summary Page

4.3.6 The “Request Case Closure” option notifies the STAR Agent that the vehicle concern has been resolved and the case can be closed. **Important:** Prior to selecting “Request Case Closure,” a technician must enter vehicle resolution in **Conversation Notes**.

## 4.4 Closing a Case

- 4.4.1 Upon selecting a case/case number from his/her dashboard, the user will be directed to a Case Summary page.
- 4.4.2 Any case can be updated by clicking 'Edit' button on the Case Summary page.
- 4.4.3 Once in "Edit" mode for a case, the options 'Request Case Closure' and 'Print Case' become available from this interface (Fig. 15).



Fig. 15: Case Summary Toolbar Options, Including "Request Case Closure"

- 4.4.4 Selecting the "Request Case Closure" button notifies the STAR Agent that the vehicle concern has been resolved and the case can be closed.
  - 4.4.4.1 **Important:** Prior to selecting "Request Case Closure," Technician must enter/add vehicle resolution in **Conversation Notes**.
- 4.4.5 Updates to the 'Conversation' box can be viewed in the central part of the Case Summary page. At this point the case will have already entered the STAR queue and will be picked up by a STAR Agent to close.
- 4.4.6 After a Dealer Technician requests a case closure, s/he is automatically taken to a survey that requires completion.
  - 4.4.6.1 If a STAR Agent closes a case on his/her end, a survey will appear in the Technician Dashboard and will require completion.
- 4.4.7 Once a survey is completed, a user must click **Submit Survey** link in upper-right of the survey.
  - 4.4.7.1 Simply saving the case will not submit the survey (this action will only save any recent changes) and the survey will remain in "Open" status until properly submitted via "Submit Survey" link.

A screenshot of a web-based survey interface. At the top left is the MOPAR logo and the STAR logo with the text 'SERVICE TECHNICAL ASSISTANCE RESOURCE'. Below the logos is a navigation bar with 'Home' and a search icon. The main content area shows case details: 'ID 101273185', 'CUSTOMER CONCERN', and 'VIN 3C6JRF7D67JG152601' with the note 'check engine light on'. A blue header bar for 'Final Repair Information' contains a 'Submit Survey' button circled in red. Below this is a form with the question 'Is the customer concern fixed?' and radio buttons for 'Yes' and 'No'. A section titled 'STAR Agent Feedback Survey' contains three questions with radio buttons for 'Yes' and 'No', and two text input fields for comments, each with a 'Maximum character limit 500' label.

Figure 16: Case Survey Showing Location of "Submit Survey" Link

- 4.4.8 Open surveys remain in a Technician’s **Open Surveys** queue until completed and submitted.
- 4.4.9 After a technician has completed a survey related to a technical assistance experience, the survey will appear in the **Completed Surveys** queue in his/her dashboard.

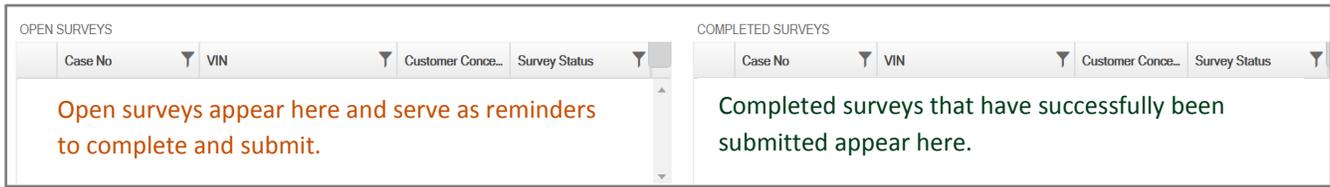


Figure 17: Open Surveys and Completed Surveys Queues in Cherwell Dashboard

- 4.4.10 Cases closed within the last year can be viewed by accessing the **Closed Within Last Year** queue from a Technician’s dashboard.
  - 4.4.10.1 Click the number showing the amount of cases in the queue (to the right of the queue).
  - 4.4.10.2 From list of case options, click on desired case number to view case details.

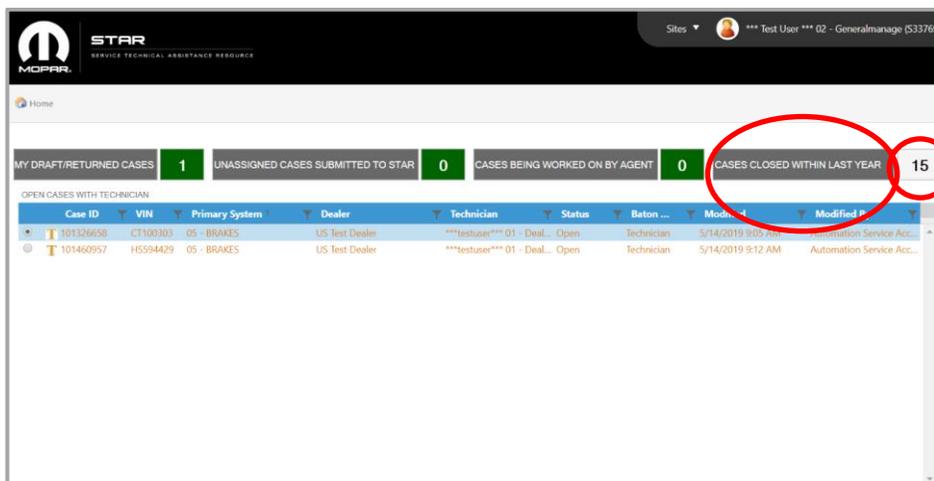


Figure 18: Location of “Cases Closed Within Last Year” in Cherwell Dashboard

- 4.4.11 Within 15 business days of a case being closed, a Technician can reopen a case by clicking **Reopen Case** button from Case Summary page.
- 4.4.12 Cases older than 15 business days cannot be reopened; they can only be reviewed.

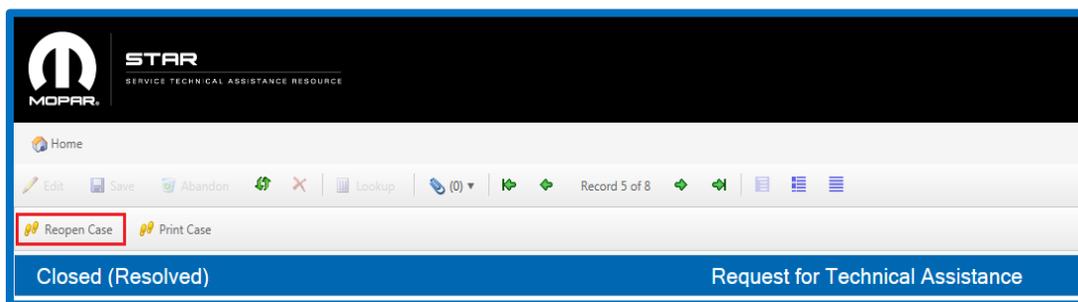


Figure 19: Reopen Case Button in Case Summary (Available for Cases Up to 15 Days Old Only)



The screenshot displays the STAR Service Technical Assistance Resource interface. At the top left, the MOPAR logo and STAR logo are visible. The page title is "Request for Technical Assistance" and the case number is "1871". The interface is divided into several sections:

- Contact Information:**
  - ID: S34349E
  - NAME: \*\*\* Testuser \*\*\* 13 - Serviceadviso
  - DEALER CODE: 11719
  - PHONE: (247) 465-4615
  - EMAIL ADDRESS: [Redacted]
  - EMAIL ALERTS: No
  - MOBILE ALERTS: Yes
- Vehicle Information:**
  - VIN: 3C3CFAR2CT100303
  - VEHICLE: FIAT 500 POP HATCHBACK
  - ENGINE: 1.4L I4 MultiAir 16V Engine
  - ODOMETER: 56728
  - DAYS IN SHOP: 11
  - RO NUMBER: 123456
  - OFF ROAD OR TOW-IN: Yes
- Conversation:**
  - Customer Concern: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Mauris ut nibh nec purus ultrices eleifend. Nullam eu vulputate risus. Cras faucibus at odio ut tempus. Donec et ante ac mi cursus euismod. Fusce posuere blandit.
  - ttAgent - Fri Apr 14, 2017 9:34:46: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer nec odio. Praesent libero. Sed cursus ante dapibus diam. Sed nisi. Nulla quis sem at nib.
  - \*\*\* Testuser \*\*\* 13 - Serviceadviso - Fri Apr 14, 2017 9:46:46: Quisque tempor neque vel ultrices tristique. Phasellus est massa, blandit et velit in, pharetra dignissim elit. Mauris ultrices vulputate ante id auctor. Aliquam efficitur sit amet nisi id porta. Vestibulum ullamcorper, lacus eget vestibulum pretium, odio neque bibendum enim, eu facilisis nulla mauris ac velit. Suspendisse potenti. Vivamus mollis augue nec est suscipit rhoncus. Pellentesque lacinia maximus pharetra. Integer quis mi eu risus ornare ullamcorper a quis.

Annotations on the right side of the screenshot:

- A blue box labeled "STAR Notes" points to the blue text in the conversation log.
- An orange box labeled "Dealer Notes" points to the orange text in the conversation log.

Fig. 22: Conversation Updates (Dealer – Orange; STAR – Blue)

## 4.6 Dealer Technician Dashboard

4.6.1 A Dealer Technician's dashboard is available by selecting the **Home** button at any time (Fig. 23).

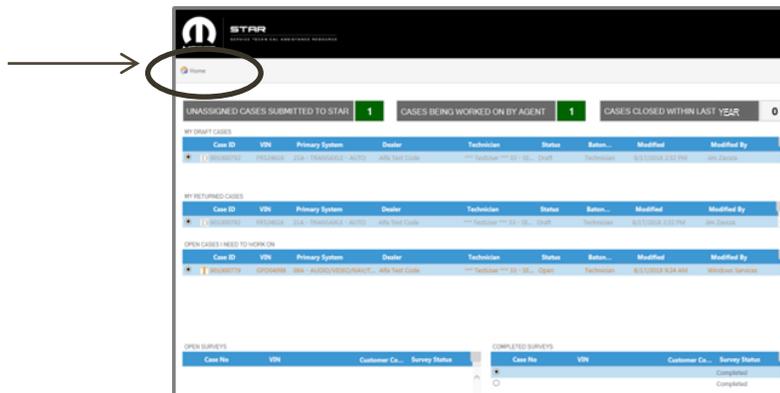


Fig. 23: Dealer Technician Dashboard

4.6.2 The main dashboard displays the following information/categories:

### Collapsed Queues With Counters:

- [Unassigned Cases Submitted to STAR](#)
  - [Cases Being Worked on By Agent](#)
  - [Cases Closed Within Last Year](#)
- These are collapsed queues because they do not require immediate visibility for a Dealer Technician.
  - When the number next to each counter is clicked, the queue will show.

### Queues:

- [My Draft Cases](#)
  - [My Returned Cases](#)
  - [Open Cases I Need to Work On](#)
  - [Open Surveys](#)
  - [Completed Surveys](#)
- When making a case selection from the dashboard, the user will be directed to Case Summary page for further actions related to a specific case.

4.6.3 Columns within the main dashboard's queues show the following information (which can be sorted/filtered by column headers as needed):

- Case number
- VIN
- Primary System Impacted
- Dealer Information
- Technician Information
- Baton holder
- Status of case
  - Most common statuses include: Draft, New, Open, and Closed.
- Application Group
- Customer Concern

4.6.4 Note that the system only allows for a maximum of 8 cases (or surveys) to be worked on at a time, so the Dealer Technician will be notified if the number of active or draft cases (or incomplete surveys) exceeds that number.

## 5. Service Manager Interaction with the Cherwell Portal

5.1 The designated **Service Manager** at a dealership manages and creates cases in the same way as a Dealer Technician does; however, they are presented with a different dashboard. The Service Manager dashboard shows all the cases logged from their dealership and all completed surveys (Fig. 24).

Case	VIN	Primary System	Dealer	Technician	Date	Status	Appl Grp	Customer
11705	TN144100	06 - CLUTCH	US Test Dealer	Technician *** 84 - Driver	Technician	Open	201 - TRANS CORE GROUP	99% increase
11730	DJ AG100242	09 - ENGINE	US Test Dealer	FrtnPdtTest432 LethaPATes	Technician	Open	331 - DRIVEABILITY CORE GROUP	DEANDRE M
11728	DH 6J02030	18C - DIESEL ENGINE PERFORMAN	Star Mid Hndln	Star Wlp20089	Technician	Open	410 - ENGINE - CLIMING	runs rough, M
11838	JA TN144100	08A - AUDIO/VIDEO/NAV/TELEMATL	Alla Test Code	Technician *** 37 - OWNER PA	Technician	Open	891 - AUDIO/VIDEO/NAV/TELEMATIC	Customer say
11794	JA TN144100	08A - AUDIO/VIDEO/NAV/TELEMATL	Alla Test Code	Technician *** 37 - OWNER PA	Technician	Open	891 - AUDIO/VIDEO/NAV/TELEMATIC	This is a test
11805	JA TN144100	08A - AUDIO/VIDEO/NAV/TELEMATL	Alla Test Code	Technician *** 37 - OWNER PA	Technician	Open	891 - AUDIO/VIDEO/NAV/TELEMATIC	new ticket #2
11829	UF FN059931	21A - TRANSAVLE - AUTO	Alla Test Code	Test User *** 02 - Generalman	Technician	Open	ECS	audio static or
11844	JA TN144100	09 - ENGINE	Dealerconnect Test Code Au	Technician *** 32 - Parts Directo	Technician	Escalated	MASTER CONSULTANT	of consumpt

Fig. 24: Service Manager Dashboard in Cherwell

5.2 The Service Manager Dashboard can be accessed by selecting Cherwell's **Home** button at any time (Fig. 25).

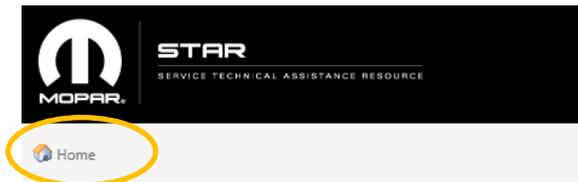


Fig. 25: Cherwell's Home Button

5.3 The Service Manager can assign and/or reassign the case to other technicians at their dealership.

5.3.1 To assign a case to a different technician, a Service Manager would take the following actions:

5.3.1.1 Select a case from the dashboard.

5.3.1.2 The Case Summary Page will appear with assigned technician information on the left.

5.3.1.3 Above the case information will be a Case Summary Toolbar with several buttons, including "Reassign Technician." Select "Reassign Technician" button (Fig. 26).



Figure 26: Case Summary Toolbar, including "Reassign Technician" button

5.3.1.4 A prompt will appear with a list of names of technicians, their ID numbers, and contact information (Fig. 27).

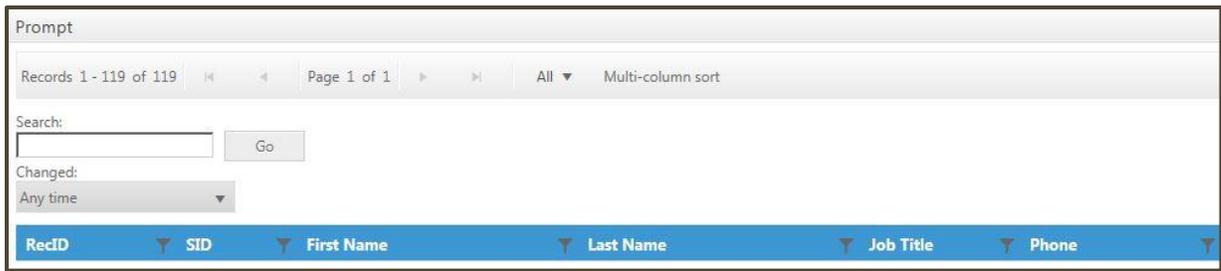


Fig. 27: Prompt to Reassign Technician

- 5.3.1.5 Select desired technician for reassignment.
- 5.3.1.6 A Cherwell Service Management pop-up will appear with a message request for use of a shared license.
- 5.3.1.7 Select **Yes** to complete license request. (No button cancels request.) (See Fig. 28.)
- 5.3.1.8 Manager will be directed back to the Case Summary Page for the case but will now notice the new technician assigned to the case.



Fig. 28: Cherwell Service Management License Pop-up

- 5.3.1.9 The reassigned technician will now have the case in his/her “Open Cases I Need to Work On” queue; whereas, the case will disappear from the previous technician’s queue.
- 5.4 The Service Manager dashboard shows not only the Service Manager’s own cases, but all the cases that are being worked on by other Dealer Technicians within the Dealership.
- 5.5 The Service Manager dashboard is organized as follows:

5.5.1 **Collapsed Queues With Counters** – remain collapsed because they do not require immediate visibility.

[-Unassigned Cases Submitted to STAR](#)

[-Cases Being Worked on By Agent](#)

[-Cases Closed Within Last Year](#)

\*When the number next to each counter is clicked, the cases in each queue will show.

5.5.2 **General Queue (“Open Cases With Technician”)** – When a case is selected from this queue, user is directed to a Case Summary Page where he/she can view the case, or edit the case by selecting “Edit” button.

5.5.3 **Completed Surveys** - These are surveys completed by Service Manager or Technician.

5.5.4 **Columns** within the main dashboard’s queues show the following information (which can be sorted/filtered by column headers as needed):

- Case Number
- Vehicle Family
- VIN
- Primary System Impacted
- Dealer Information
- Technician Information
- Baton holder
- Status of case (most common are: Draft, New, Open, and Closed)
- Application Group
- Customer Concern

5.6 The Service Manager can do everything a Dealer Technician can do except they have the additional capability of [reassigning cases](#) to other Dealer Technicians.

5.7 The Service Manager is exempt from the limit of 8 draft cases/incomplete surveys.

## 6. Toolbars and Menus

6.1 Various menu options are available in Cherwell and those that are active will depend on current system actions. Below are menu items that Dealer Technicians will encounter most often.

### 6.1.1 CASE SUMMARY TOOLBAR

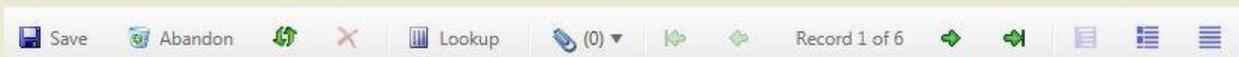
The **Case Summary Toolbar** is available once a user has selected a case and is viewing it in the Case Summary Page:

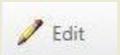
- 1) **Conversation:** Allows dealer to mark conversation 'As Read' without passing the baton (i.e. transitioning responsibility for the case).
- 2) **Email/SMS settings:** Allows Technician to toggle the email and SMS notifications.
- 3) **Request Case Closure:** Allows Technician to request STAR Agent to close the case. However, a resolution for the vehicle fix must be entered prior to making this selection.
- 4) **Print Case:** Allows Technician to print specific case details whenever needed.
- 5) **Reassign Technician** (for Service Managers only): Allows Service Manager to reassign a case for a different technician to work.

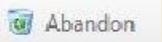
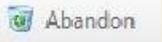


### 6.1.2 CASE ACTIONS TOOLBAR

The **Case Actions Toolbar** appears above the Case Summary Toolbar when a case is in 'Edit' mode:



Toolbar Item	Action	Description
	Home	Returns user to his/her main dashboard.
	Edit	When in a draft state, the Edit button allows users to add information to a case (but does not allow addition of conversation notes).  While in 'Open' status, this button allows the addition of conversation notes, plus additional attachments.
	Save	Saves a case and any updates or adjustments made, including conversation notes.

	Abandon (Draft)	Before submitting a case to STAR, the Abandon action deletes the case and its related details without saving. Once a case is abandoned in the draft phase, it cannot be reopened or retrieved.
	Abandon	After submitting a case to STAR, the Abandon action disregards only any recent changes made to the case. The action does not delete the case as it would in draft phase. Instead, the action reverts the case to its most recently saved version.
	Refresh	Refreshes the screen to show any updated information, either from an integration, or when someone else modifies a record.
	Attach	Attach objects, files, a web page or a shortcut.
	Lookup	Displays a list of legal values (for legal value fields only). A legal value would be a value contained in the look up table associated with that field. For example, if the field was an address State, the legal values would be States (e.g., CA, IL, NY etc.).
	Go to first record in set.	
	Go to previous record in set.	
	Go to next record in set.	
	Go to last record in set.	
	Show Current Record (i.e. Case)	
	Show Results List (i.e. a Group of Cases)	