



Customer Loyalty Program

Reference Guide

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Program Overview

The Ford Customer Loyalty Program focuses on empowering the front line at your dealership, driving customer satisfaction and loyalty.

This program does not stand still. It is important to be aware of the latest program guidelines as we work together to further strengthen customer satisfaction and loyalty.

We actively listen to Dealer feedback – in both the goodwill and loaner spaces – and measure the program's impact on improving the overall Customer Experience performance at your store and for Ford. Based on this input, we have continued to make thoughtful changes to improve the program, to foster both Dealer and customer satisfaction.

The program has three key elements:

EMPOWERED DEALERSHIP FRONT LINE:
Repairs ≤ \$1,000

CUSTOMER RELATIONSHIP CENTER (CRC)
FAST PATH: Repairs > \$1,000

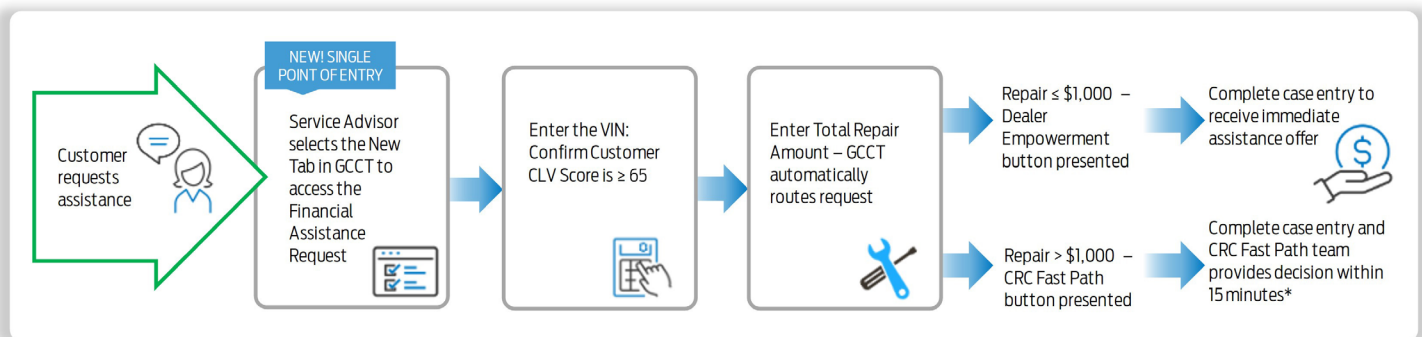
KEEP THEM MOVING: Enhanced Loaner and Alternative Transportation Options

Claiming under the Ford Customer Loyalty Program includes:

- **PCLP** – For claims that you approve under your empowerment authorization
- **P11** – Remains the same for approvals from the CRC and now also applies to In-Warranty Loaner process approved loaners
- **PRENT** – For your self-approved loaner claims using your allocated budget
- **PCLP** – For Alternative Transportation claims (e.g., ride-hailing, shuttles)

More details on claiming can be found in the [Claims section](#) of this document.

NEW Single Point of Entry for All Financial Assistance Requests



*On repairs up to \$5,000

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Dealer Empowerment ≤ \$1,000

What It Is

The Ford Customer Loyalty Program **empowers the dealership's front line** with self-authorization for repairs ≤ \$1,000 at warranty rates before any Ford, Dealer or customer participation.

With empowerment comes increased responsibility. We're empowering you to make the right decision.

- Based on claims data, Dealers will be able to handle the majority of qualifying assistance requests on the front lines. That's efficient for you and the customer as you provide expedited resolution to customer requests
- You are the single point of contact for repairs ≤ \$1,000 within program eligibility
- Eligibility: Vehicles up to 7 years and 100,000 miles with a Customer Lifetime Value (CLV) of ≥ 65
- Dealer budget for repairs is a centralized budget, allowing more flexibility to help more customers
- Dealer Empowerment can be used for a single repair event, not a single repair event broken into multiple ROs or RO lines – similar logic used for Warranty repairs

It's important to manage customer assistance requests, including knowing when to offer assistance and how to determine whether a customer should receive assistance. Consider assistance in circumstances such as:

- A customer requests assistance
- A customer is loyal to the dealership and Ford Motor Company
- There is a risk of the customer escalating the issue (legal action)

As part of Dealer empowerment, the Ford Customer Loyalty Program features a centralized budget for repairs. It supports efficiency in managing out-of-warranty customer assistance.

You are not restricted by an allocated goodwill assistance budget on repairs up to \$1,000.

Of course, the centralized budget is not a blank check. You are responsible for managing your use of this centralized budget by carefully assessing each customer's assistance situation and making the decision that makes the most sense for the customer, your dealership and Ford Motor Company.

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What to Do: Decision-Making Steps

Entering a Dealer Empowerment Financial Assistance Request in GCCT is the first step toward making the assistance decision on the front line. In a matter of minutes, you can access the CLV Calculator Tool, complete the fields and obtain an award recommendation on eligible requests ≤ \$1,000.

The CLV Calculator will:

- Help you determine goodwill assistance
- Provide the recommended Ford Customer Loyalty Program percentage award. You'll notice, in addition to a recommended assistance percentage, the calculator also provides an additional assistance percentage range for flexibility
- Provide a Ford participation high/low range for special circumstances
 - Customer and Dealer participation should be considered
- Align with the CRC process to determine assistance
- Include a printable goodwill form for customer award

Dealers need to adhere to offering assistance within the range provided. The recommendation reflects vehicle and customer data calculations that take the guesswork out of your decision. It also provides consistency and a means for you to explain the decision to customers. The high/low range gives you the ability to make case-by-case decisions based on front line knowledge.

Using Dealer Empowerment Financial Assistance

There is now a single point of entry for all Financial Assistance Requests.

It's Easy! Only Eight Items Needed for Financial Assistance Request Submissions

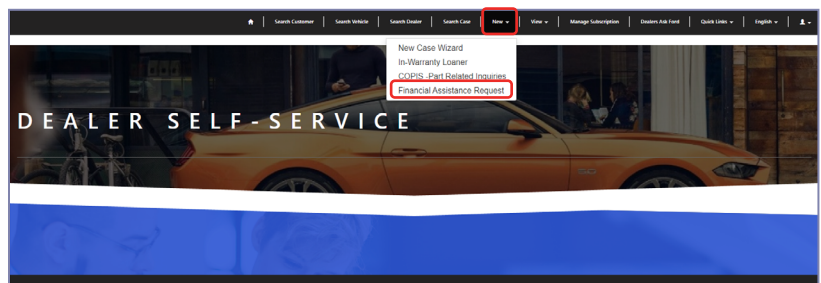
- VIN
- Mileage
- Total Repair Amount
- RO Date/RO Number/RO Line
- Parts and Labor Breakdown
- Summary of Repair Comments

Following are the specific GCCT screens you will see when entering this information to create a Dealer Empowerment Financial Assistance Request (FAR) case to determine and communicate assistance to the customer.

Step 1 – Go to GCCT

- Select the **New** tab to see a dropdown of choices
- Select **Financial Assistance Request**

Dealer Empowerment Financial Assistance submission questions should be directed to web support at 800-790-4357, option 2.



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Step 2

- Enter the customer's VIN and select Search

- Click on the VIN to view the vehicle details

- Click on the Current Owner tab to view the customer details, including CLV score

Search for Vehicle

VIN

Improper use of Ford customer information is in violation of your Sales and Service Agreement and related agreements. Clicking Search confirms that this search is in support of servicing a customer in your dealership and not for marketing purposes.

Show 10 ▾

VIN	Model Year	Make	Model Vehicle Line	Mileage	Warranty Start Date
OPTIONAL AT FORD CREDIT/LEASE	2018	Ford	EDGE	50,000	04/29/2018

Showing 1 - 1 Of 1 Items Previous 1 Next

Home / Search for Vehicle /

Vehicle

General

VIN

Fixed Tag ☒ No ☐ Yes

Warranty Start Date

Vehicle Details

Hours in Service

Mileage

Mileage Status ☒ Miles ☐ Kilometers

Model / FCU ☒ No ☐ Yes

Model Year

Make

Model Vehicle Line

Body Style

Home / Search for Vehicle /

Vehicle

Summary

Customer Name

Home Phone

Email ☒ Allow ☐ Do Not Allow

Street 1

City

State/Province

ZIP/Postal Code

Current CLV Score

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Step 2 – continued

What if a customer's CLV score does not automatically appear?

- The system will display three dropdown questions. Answer the simple questions to enable the system to proceed with the request

Only add information to the white field areas. Adding comments to the gray areas will block the calculation from working.

- Next you will click the **Continue Financial Assistance Request** button
- Confirm this is the correct customer on the case and click **Continue Financial Assistance Request** to enter the total repair amount
- Once the repair amount has been submitted, click the **Continue Financial Assistance Request** button

Dealer Empowerment

Submit Close

General

Customer *
JOHN SMITH

Phone
555-555-5555

Customer Type
Retail

Fleet Size

Current CLV Score (Must be 0-99)
N/A

Repair Amount (Warranty Rates) *
400

Vehicle Age (Months)
53

Purchase History *
One New Vehicle Purchased

Ownership Status *
Current New Vehicle Owner

Service History *
One Paid Service (last 2 years)

CLV Recommended (% Repair)

CLV High Range (% Repair)

CLV Low Range (% Repair)

Vehicle Details

VIN *
1F10000000000000000000000000000000

Model Year
2018

Vehicle Make
FORD

Model/Vehicle Line
EDGE

Warranty Start Date
04/09/2018

Mileage *
50000

Mileage Units (Ensure Mileage Units match servicing Dealer's country/mileage units)
☐ International ☒ Miles

Comments

Comments

Home / Search for Vehicle /

Change Ownership Update Comments Refresh CLV Score **Continue Financial Assistance Request**

Home / Search for Vehicle /

Change Ownership Update Comments Refresh CLV Score **Continue Financial Assistance Request**

Vehicle Current Owner

General

VIN *
1F10000000000000000000000000000000

Fleet Size

Warranty Start Date *

Confirmation

Is Current Owner JOHN SMITH going to be the Customer on the Case?

Yes No Close

Home / Search for Vehicle /

Change Ownership Update Comments Refresh CLV Score **Continue Financial Assistance Request**

Vehicle Current Owner

General

VIN *
1F10000000000000000000000000000000

Fleet Size

Warranty Start Date *

Financial Assistance Request

Enter Total Repair Amount

Submit Close

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Step 3

- Select the appropriate Case Classification as shown here
- Add the Repair Amount as well as Mileage, and select **Submit** to view the recommended assistance
- Click **Create Repair Assistance** to proceed

Financial Assistance Case Classification

Dealer Empowerment

C/CMM Assistance Request > Financial Assistance - Vehicle, ConfExp

OK Cancel

Home / Dealer Empowerment / Open a New Case

Dealer Empowerment

Submit Close

General

Customer *
JOHN SMITH

Phone
555-555-5555

Customer Type
Retail

Fleet Size

Current CLV Score (Must be 0-99)
97

Repair Amount (Warranty Rates) *
400

Vehicle Details

VIN *
[Redacted]

Model Year
2018

Vehicle Make
FORD

Model/Vehicle Line
EDGE

Warranty Start Date
04/29/2018

Mileage *
50000

Mileage Units (Ensure Mileage Units match servicing Dealer's country/mileage units)
☐ Kilometers ☒ Miles

Home / Dealer Empowerment /

Dealer Empowerment

Submit Close **Create Repair Assistance**

General

Customer *
JOHN SMITH

Phone
555-555-5555

Customer Type
Retail

Fleet Size

Vehicle Details

VIN *
[Redacted]

Model Year
2018

Vehicle Make
FORD

Model/Vehicle Line
EDGE

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Step 4

- Be sure to consider customer and Dealer participation in the decision process

Home / Case / CAS-00000000 / Empowerment Financial Assistance Request

Empowerment Financial Assistance Request - General Information

Subject Title
Empowerment Financial Assistance Request for CAS-00000000

Regarding
CAS-00000000

Vehicle
2018 FORD F-150 LARIAT

Repair Order Number *
123456

Repair Order Open Date *
11/10/2021

Repair Order Closed Date
[Calendar Icon]

Mileage at Repair Order Open
50,000

Mileage Units
☐ Kilometers ☒ Miles

Fleet Size
[Dropdown]

Requestor Details

Requestor Name
David

Requestor Job Role
Service Manager

Customer Concern/Repair Performed *
Repair performed.

Finalization

Number of Approval Cost Details
[Dropdown]

Cost Details

Remedy Type *	ROI Line Number *
Repair (Parts & Labor)	1b
Customer Share (amount) *	Customer Share (%)
140.00	35.00
Dealer Share (amount) *	Dealer Share (%)
0.00	0.00
Ford/Lincoln Share (amount) *	Ford/Lincoln Share (%)
200.00	05.00
Total Amount *	Approval/Rejection Code
400.00	---

CLV Calculator Results

CLV Recommended (%)
65.00
CLV High Range (%)
70.00
CLV Low Range (%)
60.00

- Enter the Repair Order Line Number, Repair Order Number and Repair Order Open Date
- Enter the required information for the Customer Concern/Repair Performed

Home / Case / CAS-00000000 / Empowerment Financial Assistance Request

Empowerment Financial Assistance Request - General Information

Subject Title
Empowerment Financial Assistance Request for CAS-00000000

Regarding
CAS-00000000

Vehicle
2018 FORD F-150 LARIAT

Repair Order Number *
123456

Repair Order Open Date *
11/10/2021

Repair Order Closed Date
[Calendar Icon]

Mileage at Repair Order Open
50,000

Mileage Units
☐ Kilometers ☒ Miles

Fleet Size
[Dropdown]

Requestor Details

Requestor Name
David

Requestor Job Role
Service Manager

Customer Concern/Repair Performed *
Repair performed.

Finalization

Number of Approval Cost Details
[Dropdown]

Cost Details

Remedy Type *	ROI Line Number *
Repair (Parts & Labor)	1b
Customer Share (amount) *	Customer Share (%)
140.00	35.00
Dealer Share (amount) *	Dealer Share (%)
0.00	0.00
Ford/Lincoln Share (amount) *	Ford/Lincoln Share (%)
200.00	05.00
Total Amount *	Approval/Rejection Code
400.00	---

CLV Calculator Results

CLV Recommended (%)
65.00
CLV High Range (%)
70.00
CLV Low Range (%)
60.00

Step 4 – continued

- Here, the recommended assistance amount will be pre-populated, but you may edit as needed for those special circumstances within the previously provided range
- You will notice a **CLV High Range** and a **CLV Low Range** assistance percentage

Based on your additional knowledge about the situation, you may elect to use the high or low range assistance percentage in special circumstances – each decision is still made on a case-by-case basis using your input.

You must maintain a CLP financial assistance offering within the calculator high/low range because it reflects vehicle and customer data calculations that take the guesswork out of your decision. The recommendation also provides consistency and a means for you to explain the decision to customers.

- Select **Save** to save your case

You are now ready to communicate the offer to the customer.

IMPORTANT: Do not select the Generate Approval Code button until you have reviewed your entry in detail and ensured that it is accurate. Once chosen, the system provides an approval code and the form becomes read-only where you cannot make any changes to it.

[Home](#) / [Case](#) / [CAS-00000000](#) / [Employment Financial Assistance Request](#)

[Save](#)
[Close](#)

Employment Financial Assistance Request - General Information

Subject Title
Employment Financial Assistance Request for CAS-00000000

Reporting
CAS-00000000

Vehicle
Ford F150 LARIAT 4.0L V6

Repair Order Number *
123456

Repair Order Open Date *
11/10/2021

Repair Order Closed Date

Mileage at Repair Order Open
50,000

Mileage Units
☐ Kilometres ☒ Miles

Requester Name
David

Requester Job Role
Service Manager

Customer Concern/Repair Performed *
Repair performed

Cost Details

Customer Share (amount) *	Customer Share (%)
140.00	35.00
Dealer Share (amount) *	Dealer Share (%)
0.00	0.00
Ford/Lincoln Share (amount) *	Ford/Lincoln Share (%)
260.00	65.00
Total Amount *	Approval/Rejection Code
400.00	---

CLV Calculator Results

CLV Recommended (%)	65.00
CLV High Range (%)	70.00
CLV Low Range (%)	60.00

[Home](#) / [Case](#) / [CAS-00000000](#) / [Empowerment Financial Assistance Request CAS-00000000](#)

[Empowerment Financial Assistance Request record is Created](#)

[Save](#)
[Close](#)
[Generate Approval Code](#)
[Print Invoice](#)

Empowerment Financial Assistance Request - General Information

Request Title	<input type="text" value="I - Empowerment / Financial Assistance Request for CAS-00000000"/>		
Requesting	<input type="text" value="CAS-00000000"/>		
Request Order Number *	<input type="text" value="123456"/>	Request Order / Open Date *	<input type="text" value="11/10/2012"/>
Mileage at Repair Order Open	<input type="text" value="0"/>		
Vehicle	<input type="text" value="2012 Toyota Camry"/>		
Request Order Closed Date	<input type="text" value=""/>		
Plant Size	<input type="text" value=""/>		

Cost Details

Remedy Type *	<input type="text" value="Repair (Parts & Labor)"/>		
Customer Share (amount) *	<input type="text" value="\$ 140.00"/>	Customer Share (%)	<input type="text" value="35.00"/>
Dealer Share (amount) *	<input type="text" value="\$ 0.00"/>	Dealer Share (%)	<input type="text" value="0.00"/>
Ford's Local Share (amount) *	<input type="text" value=""/>		

Home / Case / CAS-00000000 / Empowerment Financial Assistance Request CAS-00000000

Empowerment Financial Assistance Request record is Created

Save Close **Generate Approval Code** Print Award

Empowerment Financial Assistance Request - General Information

Subject/Title

Empowerment Financial Assistance Request for CAS-00000000

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Step 5

- Communicate the offer to the customer. If the customer accepts the offer, return to the case on your screen and select the **Generate Approval Code** button

This process may not always take place in real-time. If needed, you can always revisit the case by selecting the **Empowerment Financial Assistance Request List**.

Home / Case / CAS-00000000 / Empowerment Financial Assistance Request CAS-00000000

Empowerment Financial Assistance Request record is Created

Save Close **Generate Approval Code** Print Award

Empowerment Financial Assistance Request - General Information

Subject Title
Empowerment Financial Assistance Request for CAS-00000000

Regarding
CAS-00000000

Vehicle
2020 Ford F-150

Repair Order Number *
123456

Repair Order Open Date *
11/10/2021

Repair Order Closed Date
[Date Picker]

Mileage at Repair Order Open
50,000

Mileage Units
Economies Miles

Fleet Size
[Dropdown]

Cost Details

Workorder Type *
Repair (Parts & Labor)

NO Line Number *
1b

Customer Share (amount) *
\$ 140.00

Customer Share (%)
35.00

Dealer Share (amount) *
\$ 0.00

Dealer Share (%)
0.00

Ford/Lincoln Share (amount) *
\$ 260.00

Ford/Lincoln Share (%)
65.00

Empowerment Financial Assistance Request Activities

Activity Status: Approval Status:

Created From: To:

Improper use of Ford customer information is in violation of your Sales and Service Agreement and related agreements. Clicking Search confirms that this search is in support of servicing a customer in your dealership and not for marketing purposes.

VIN	Subject	Created On	Customer	RO#	RO Open Date	Total Cost	Ford/Lincoln Share Amount	Approval Code	Approval Status	Status	Action
1F1P15H1200000000	Repair-Only Financial Assistance Request for CAS-00000000	9/11/2020	DAVID	12345	9/9/2020	\$900	\$700	XXXX496099	Approved	Completed	<input type="button" value="View"/>
1F1P15H1200000000	Repair-Only Financial Assistance Request for CAS-00000000	8/28/2020	SHYAML	12345	8/28/2020	\$550	\$500	XXXX496529	Approved	Completed	<input type="button" value="View"/>
1F1P15H1200000000	Repair-Only Financial Assistance Request for CAS-00000000	7/15/2020	ADAM	12345	7/15/2020	\$750	\$400	XXXX0732171	Approved	Completed	<input type="button" value="View"/>

Showing 1 - 3 Of 3 items

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Step 6

- Select the **Generate Approval Code** button after the customer accepts the offer, you've completed the repair and have made any needed edits
- Select **Print Award** to generate the Customer Goodwill Award form. It will be pre-populated with all relevant vehicle information
- Review the form to ensure it is complete and accurate
- Print the form and obtain the customer's signature
- File the form with the RO

Home / Case / CAS-00000000 / Empowerment Financial Assistance Request CAS-00000000

Empowerment Financial Assistance Request record is Created

Save Close **Generate Approval Code** Print Award

Empowerment Financial Assistance Request - General Information Cost Details

Home / Case / CAS-00000000 / Empowerment Financial Assistance Request CAS-00000000

Empowerment Financial Assistance Request record is Created

Save Close **Generate Approval Code** **Print Award**

Empowerment Financial Assistance Request - General Information Cost Details

Subject Info
Empowerment Financial Assistance Request for CAS-00000000

Reporting
CAS-00000000

Repair Order Number *
123456

Repair Order Open Date *
11/10/2021

Repair Order Closed Date

Mileage at Repair Order Open
50,000

Mileage Units
Kilometers Miles

Vehicle
K4A - EDGE AWD SPORT

Fleet Size

Homedy Type *
Repair (Parts & Labor)

NO Line Number *
1b

Customer Share (amount) *
\$ 140.00

Customer Share (%)
35.00

Dealer Share (amount) *
\$ 0.00

Dealer Share (%)
0.00

Ford/Lincoln Share (amount) *
\$ 260.00

Ford/Lincoln Share (%)
65.00

Customer Goodwill Award for CAS-00000000

Customer Information:

Customer
John Smith

Phone
555-555-5555

VIN
CAS-00000000

GCCT Case Number
CAS-00000000

Model Year
2018

Model/Vehicle Line
K4A - EDGE AWD SPORT

Mileage
50000

Warranty Start Date
04/28/2018

Ford Goodwill (\$)
\$260.00

Date of Repair
11/10/2021

Customer Participation(\$)
\$140.00

Dealer Participation(\$)
\$0.00

Dealership Information:

Dealer
Bob Ford

Phone
555-555-5555

Fax
555-555-5555

Address
8948 Service Rd.

Dealership Contact
David

Dealer P&A code *
12345

Customer Goodwill Award - Dealer Self-Service

Customer Goodwill Award for CAS-00000000

Customer Information:

Customer
John Smith

Phone
555-555-5555

VIN
CAS-00000000

GCCT Case Number
CAS-00000000

Model Year
2018

Model/Vehicle Line
K4A - EDGE AWD SPORT

Mileage
50000

Warranty Start Date
04/28/2018

Ford Goodwill (\$)
\$260.00

Date of Repair
11/10/2021

Customer Participation(\$)
\$140.00

Dealer Participation(\$)
\$0.00

Dealership Information:

Dealer
Bob Ford

Phone
555-555-5555

Fax
555-555-5555

Address
8948 Service Rd.

Dealership Contact
David

Dealer P&A code *
12345

Print 1 sheet of paper

Destination
WebEx Document Lo

Pages
All

Copies
1

Layout
Portrait

Color
Black and white

More settings

Print Cancel

Unique Case Situations

Unique situations may occur when determining assistance on a customer's request. These situations include when a customer declines assistance, when the repair amount changes, or when an error was made in submitting the request and an approval code has been generated. These situations are handled as follows:

- **Customer declines assistance**

- Locate the case on the Dealer Portal by using the Empowerment Financial Assistance Request List
- Click on the Cancel icon for that case (green box with “x”)
- Select **Cancel Empowerment Request** to close the case
- Enter the reason for cancellation or rejection in the comment box

Empowerment Financial Assistance Request Activities

Activity Status: Approval Status:

Created From: To:

Improve your Ford customer information is in violation of your Sales and Service Agreement and related agreements. Clicking Search confirms that this search is in support of servicing a customer in your dealership and not for marketing purposes.

Show [16]	Subject	Created On	Customer	BOM	RO Open Date	Total Cost	Ford/Lincoln Share Amount	Approval Code	Approval Status	Status	Action
[Financial Assistance Request for CAS-00000000]	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc	173456	12/17/2020	\$600.00	\$750.00	0		Open	[+][x]
[Financial Assistance Request for CAS-00000000]	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc	123456	11/30/2020	\$200.00	\$110.00	0		Open	[+][x]
[Financial Assistance Request for CAS-00000000]	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc	123456	12/28/2020	\$600.00	\$300.00	0		Open	[+][x]
[Financial Assistance Request for CAS-00000000]	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc	173456	12/06/2020	\$700.00	\$350.00	0		Open	[+][x]
[Financial Assistance Request for CAS-00000000]	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc	123456	12/28/2020	\$701.00	\$350.50	0		Open	[+][x]
[Financial Assistance Request for CAS-00000000]	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc	123456	12/28/2020	\$700.00	\$350.00	0		Open	[+][x]

Home / Case / CAS-00000000 / Empowerment Financial Assistance Request

Close

Print Award

Cancel Empowerment Request

Empowerment Financial Assistance Request

Subject/Title *

Financial Assistance Request for CAS-00000000

Regarding

CAS-00000000

Repair Order Number *

123456

Mileage at Repair Order Open *

Repair Order Open Date *

01/01/2021

Mileage Units *

Cancel or Rejection Reason

Please enter a reason for cancellation or rejection of offer:

Yes

Close

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Unique Case Situations – continued

- Repair amount changes, but remains under the dealership authority level of \$1,000

- Locate the case on the Dealer Portal by using the Empowerment Financial Assistance Request List
- Click on the Cancel icon for that case (green box with “x”)

- Select **Cancel Empowerment Request** to close the case
- Enter the reason for cancellation or rejection in the comment box
- Create a new case with complete updated information

- Repair amount changes resulting in an amount above \$1,000

- Locate the case on the Dealer Portal by using the Empowerment Financial Assistance Request List
- Click on the Cancel icon for that case (green box with “x”)

VIN	Subject	Created On	Customer	RCM	RO Open Date	Total Cost	Ford/Lincoln Share Amount	Approval Code	Approval Status	Status	Action
123456	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc.	123456	12/21/2020	\$500.00	\$250.00	0	Open	Open	
123456	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc.	123456	11/30/2020	\$200.00	\$110.00	0	Open	Open	
123456	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc.	123456	12/28/2020	\$800.00	\$300.00	0	Open	Open	
123456	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc.	123456	12/28/2020	\$700.00	\$350.00	0	Open	Open	
123456	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc.	123456	12/28/2020	\$701.00	\$350.50	0	Open	Open	
123456	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc.	123456	12/28/2020	\$700.00	\$392.00	0	Open	Open	

Home / Case / CAS-00000000 / Empowerment Financial Assistance Request

Close **Print Award** **Cancel Empowerment Request**

Cancellation or Rejection Reason

Please enter a reason for cancellation or rejection of offer:

Yes **Close**

VIN	Subject	Created On	Customer	RCM	RO Open Date	Total Cost	Ford/Lincoln Share Amount	Approval Code	Approval Status	Status	Action
123456	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc.	123456	12/21/2020	\$500.00	\$250.00	0	Open	Open	
123456	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc.	123456	11/30/2020	\$200.00	\$110.00	0	Open	Open	
123456	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc.	123456	12/28/2020	\$800.00	\$300.00	0	Open	Open	
123456	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc.	123456	12/28/2020	\$700.00	\$350.00	0	Open	Open	
123456	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc.	123456	12/28/2020	\$701.00	\$350.50	0	Open	Open	
123456	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc.	123456	12/28/2020	\$700.00	\$392.00	0	Open	Open	

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Unique Case Situations – continued

- Select **Cancel Empowerment Request** to close the case
- Enter the reason for cancellation or rejection in the comment box
- Follow the steps to reach out to CRC on an assistance request (see process [here](#))

- An error was made when submitting request and no approval code was generated

- Locate the case on the Dealer Portal by using the Empowerment Financial Assistance Request List
- Click on the Cancel icon for that case (green box with “x”)

- Select **Cancel Empowerment Request** to close the case
- Enter the reason for cancellation or rejection in the comment box
- Create a new case with complete updated information

Home / Case / CAS-00000000 / Empowerment Financial Assistance Request

Close **Print Award** **Cancel Empowerment Request**

Empowerment Financial Assistance Request

Subject/Title *

Financial Assistance Request for CAS-00000000

Regarding

CAS-00000000

Repair Order Number *

123456

Repair Order Open Date *

01/01/2021

Mileage at Repair Order Open *

Mileage Units *

Fleet Size

Cancel Empowerment Request

Please enter a reason for cancellation or rejection of offer:

Yes **Close**

Empowerment Financial Assistance Request Activities

Activity Status: Approval Status:

Created From: To:

Search

Improper use of Ford customer information is in violation of your Sales and Service Agreement and related agreements. Clicking Search confirms that this search is in support of servicing a customer in your dealership and not for marketing purposes.

VIN	Subject	Created On	Customer	BOB	RO Open Date	Total Cost	Ford/Lincoln Share Amount	Approval Code	Approval Status	Status	Action
123456	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc.	123456	12/29/2020	\$500.00	\$250.00	0	Open	Open	
123456	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc.	123456	12/29/2020	\$200.00	\$100.00	0	Open	Open	
123456	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc.	123456	12/29/2020	\$800.00	\$300.00	0	Open	Open	
123456	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc.	123456	12/29/2020	\$700.00	\$300.00	0	Open	Open	
123456	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc.	123456	12/29/2020	\$701.00	\$350.50	0	Open	Open	
123456	Financial Assistance Request for CAS-00000000	12/29/2020	Smith Ford Inc.	123456	12/29/2020	\$700.00	\$350.00	0	Open	Open	

Home / Case / CAS-00000000 / Empowerment Financial Assistance Request

Close **Print Award** **Cancel Empowerment Request**

Empowerment Financial Assistance Request

Subject/Title *

Financial Assistance Request for CAS-00000000

Regarding

CAS-00000000

Repair Order Number *

123456

Repair Order Open Date *

01/01/2021

Mileage at Repair Order Open *

Mileage Units *

Fleet Size

Cancel Empowerment Request

Please enter a reason for cancellation or rejection of offer:

Yes **Close**

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Unique Case Situations – continued

- **An error was made when submitting request and an approval code was generated**
 - You cannot change any fields in the calculator once the approval code has been generated. The approved codes are moved to the OWS Prior Approval Status List
 - At this time, create a new case with the accurate information and generate a new approval code to proceed with the customer request

Note: A future system enhancement is coming which will allow you to reject submissions made in error. This guide will be updated as soon as this feature is available.

Dealer-Authorized Claims Are Submitted with Code PCLP

- Claims must be submitted within 30 days of the Repair Line Close date
- Vehicle Payment and Consequential Expense requests require CRC approval and are submitted with P11
- Repairs exceeding \$1,000 require CRC approval and are submitted with a P11 code

Refer to the [Claims section](#) of this document for complete instructions. For more information on GCCT, refer to the GCCT learning resources on FMCDealer found here: [FMCDealer.com / Parts & Service / Customer Support Resources / Global Contact Center Technology \(GCCT\)](#).

Other Considerations: Appeals Outside Established Guidelines

In exceptional situations on repairs ≤ \$1,000 where a customer does not meet the criteria for assistance, but the Dealer believes there is rationale to support review and consideration for the customer:

- The dealership should open a Financial Assistance Request
- Choose the Case Classification of:
CRC / Vehicle Pay / Consequential Expense
- Clearly state in justification opening line: **APPEALING DEALER EMPOWERMENT ELIGIBILITY**
- Provide complete details, including the rationale for consideration outside eligibility guidelines
- The CRC will review and make a decision
- Decision will take up to 24 hours and will be posted in GCCT

The screenshot displays the 'Financial Assistance Case Classification' form. A dropdown menu is open, showing the selected option: 'CRC Assistance Request - Financial Assistance - WebPay: ConfEst'. The background form includes fields for 'VIN', 'First Name', 'Last Name', and 'Warranty Start Date'.

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Other Considerations: Denials

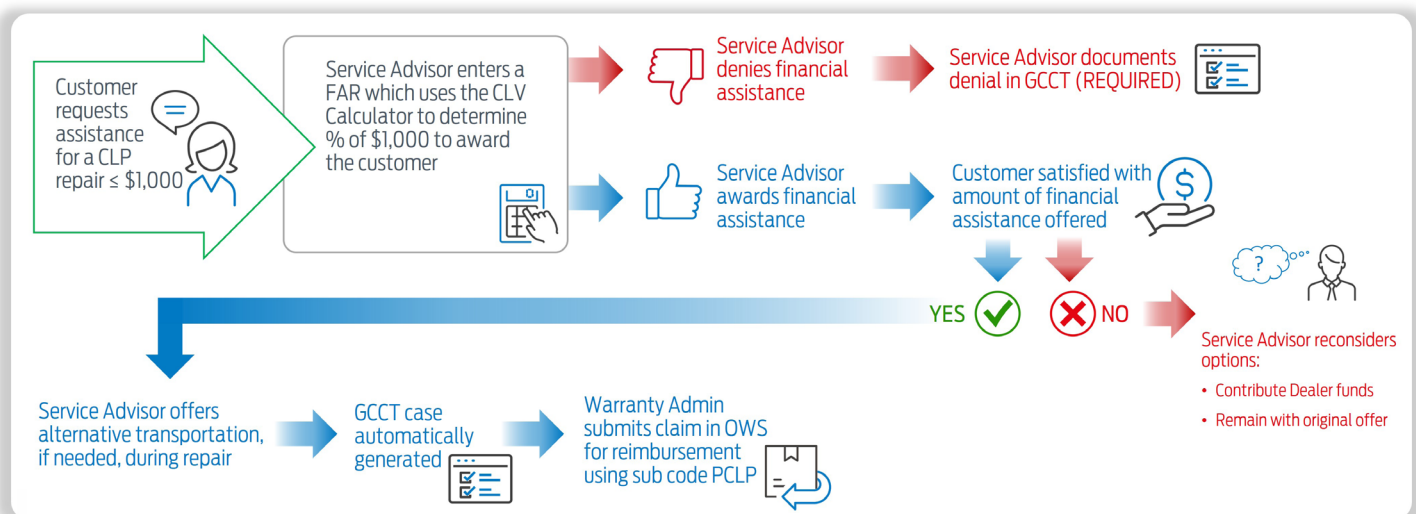
There may be instances when you will choose to deny goodwill assistance to a customer. Reasons for denial may include:

- Circumstance falls outside Ford Customer Loyalty Program guidelines
- Dealer believes that providing assistance won't achieve improved retention and loyalty

If you deny assistance, the customer may attempt to contact Ford or the CRC directly. For this reason, you should provide detailed documentation of the denial in GCCT. If the customer does contact the CRC, this documentation will demonstrate that the Dealer and Ford Motor Company are in agreement with the decision to deny assistance. You will file the denied documentation in GCCT at: [Dealer – Information / CLP / Lincoln Loyalty Request / Dealer Assist Denied](#).

Goodwill Assistance Reminders

- Administer Ford Customer Loyalty Program on a case-by-case basis
- Use good business judgment determining Ford Customer Loyalty Program assistance
- Protect and treat the goodwill budget like it's your own
- Document Ford Customer Loyalty Program denials in GCCT



KEY RESOURCE

Learn about other Dealers' experiences with Dealer Empowerment, including viewpoints, success stories and best practices. View the CLP Dealer Testimonial Video for Dealer Empowerment: Repairs ≤ \$1,000 [here](#).

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CRC Fast Path > \$1,000

What It Is

With the “Fast Path,” the Customer Relationship Center handles repairs over \$1,000 with faster response times to help improve customer satisfaction and operational efficiency. The target for response is **15 minutes** for cases under \$5,000 when complete details are provided. On average, the CRC delivered responses in **15 minutes or less** 86% of the time, benefiting both customer and Dealer satisfaction.

For repairs greater than \$1,000, you may advocate for customer assistance by creating a GCCT Financial Assistance Request (FAR) form in order for the case to reach the CRC Fast Path Team.

The CRC Fast Path has several benefits that include:

- Faster response times for improved customer satisfaction
 - 15 minutes for repairs < \$5,000
 - 60 minutes for repairs ≥ \$5,000
- The same eligibility guidelines of 7 years/100,000 miles with a CLV of ≥ 65
- Funding from a centralized budget

For repairs > \$1,000:

- Include a brief explanation of the repair
- Provide cost estimate broken down by parts/labor

For repairs ≥ \$5,000:

- Detailed Technician findings for failure are required
- The Cost Cap must be completed if the repair is an engine or transmission assembly replacement
 - Repair estimate required
 - No maintenance records required on transmission repairs
 - No Cost Cap needed for instances where assembly replacement is specifically called out in a Service Publication (e.g., TSBs, FSAs, etc.). Detailed Technician findings still needed
 - No Cost Cap needed for when repairing the engine or transmission instead of replacing the assembly
- On diesel powertrain concerns, include total engine hours (actual + idle)
- Additional information may be required



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What to Do: Create a Financial Assistance Request (FAR)

For CRC Fast Path repairs, you will first engage the CRC by creating a Financial Assistance Request. The process will start out the same way as submitting a request for financial assistance on Dealer Empowerment repairs as there is now a single entry point for Financial Assistance Requests.

Creating a Fast Path Case:

Step 1 – Go to GCCT

- Under the New tab, choose **Financial Assistance Request**

Step 2 – Enter the customer VIN and click on the VIN when it appears

- Click on the **Current Owner** tab to view the customer details, including CLV score
- Then select **Continue Financial Assistance Request**
- Confirm the current owner is the customer on the case
- Enter the total repair amount and select the appropriate case classification as shown here

Note: There are additional requirements for documenting repairs > \$5,000, including:

- Detailed Technician findings for failure
- The Cost Cap must be completed if the repair is an engine or transmission replacement
 - Repair estimate required
 - No maintenance records required on transmission repairs
 - No Cost Cap needed for instances where assembly replacement is specifically called out in a Service Publication (e.g., TSBs, FSAs, etc.)
 - On diesel powertrain concerns, include total engine hours
 - Additional information may be required
- Choosing the correct vehicle concern case classification is critical to ensure that your case is routed to CRC Fast Path Team
- Use a new case classification: **Dealer – Vehicle Concern / CSM Assistance Request / Financial Assistance – Repair**
- Complete the FAR details, making sure to provide thorough and accurate information to help support fast response time

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What to Do: Create a Financial Assistance Request (FAR) – continued

Step 3 – Include **preferred method of contact** and the best **contact number or email**

Step 4 – If approved, submit **CRC-authorized claims with sub code P11**. See the [Claims section](#) in this document for complete claiming details and instructions

For complete details on creating a Financial Assistance Request, see the GCCT learning resources on FMCDealer here: [FMCDealer.com / Parts & Service / Customer Support Resources / Global Contact Center Technology \(GCCT\)](#).

Once you receive the CRC response, you will communicate the decision to the customer and move forward with completing the repair and, if approved, submitting a P11 claim. Follow the claiming instructions detailed in this document under the [Claims section](#).

The CRC 15-minute response time applies to repair assistance claims below \$5,000. Providing all of the necessary information is critical, and required, to enable the fastest possible response from the CRC on the customer's request. High-cost repairs drive case-handling complexity and will increase response time.

Submitting Additional Case Information

Use a Portal Message to communicate additional case information needed to help resolve the case. This includes any previously submitted information that needs to be corrected (e.g., wrong line item or wrong Repair Order number originally provided) and whether a new approval code is needed.



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Portal Message Submission Steps

Create a Portal Message

1. Open the case you submitted to the Fast Path Team
2. Select **ACTIONS / Portal Message** in the case ribbon
 - The **Portal Message** window displays.
 - The subject defaults to the case number

3. Enter the message in the **Message** field

To request a new approval code due to incorrect information being provided initially:

- Reach out to your DSX via a Portal Message from within the case
- Submit a note stating the reason for request and provide the correct information
- Agent will reject the original approval code and provide a new code
- Find your DSX Agent at [FMCDealer / Parts & Service / Customer Support Resources / Customer Relationship Center – Dealer / Customer Support](#)

4. To attach a file, select **Browse**
5. Return to the top of the window and select **Save**
 - The message is added to the case and sent to the Agent's dashboard. You are returned to the case record

Save Cancel ACTIONS Resolve Case Change Vehicle Change Customer on Case Edit Customer Details Show All Case Notes

Portal Message

Catalog Inquiry

Customer Satisfaction Tools

Dealer Claims

FCS Inquiry

Financial Assistance Request

Part Availability Inquiry

Parts Order Status Inquiry

Part Quality Control Inquiry

Pricing Inquiry

Rental Detail

Traffic Inquiry

Vehicle Loyalty Allowance

Vehicle Off Road

Warranty Loaner Request

Save Cancel

Portal Message

Subject *

Portal Message for CAS-00000000

Message

Regarding

Parent Portal Message

Attach a File

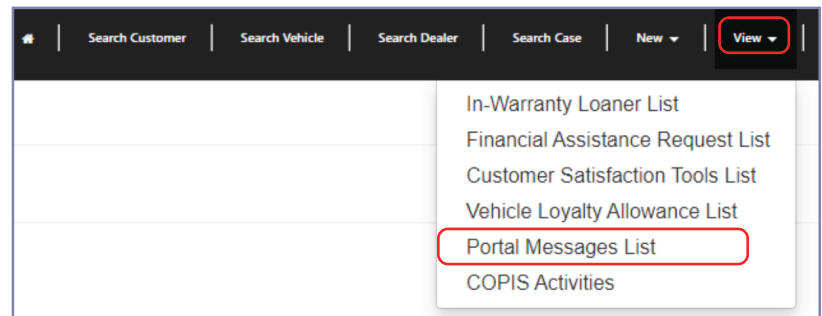
Browse...



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Respond to a Portal Message

1. Select **View / Portal Messages List** in the ribbon
 - A list of your Portal Messages displays
2. To open a message, click the blue message link
3. Select **Reply**
4. Enter the message in the **Message** field
5. To attach a file, select **Browse**
6. Return to the top of the window and select **Save**
 - The message is added to the case and sent to the Agent's dashboard. You are returned to the case record



Subject	CaseNo	Dealer	Status	Created By	Created On
Portal Message for CAS-00000000	CAS-00000000	Phil Long Ford of Denver, LLC	Open To Dealer	Message	01/17/2019 9:17 AM
Portal Message for CAS-00000000	CAS-00000000	Phil Long Ford of Denver, LLC	Open To Dealer	Message	01/17/2019 9:17 AM

Showing 1 - 2 of 2 items

Reply

Cancel

Close, No Reply

Portal Message

Subject *

Portal Message for CAS-00000000

Message

Fast Path Financial Assistance request is submitted and need an action from Dealer. Please take appropriate action.

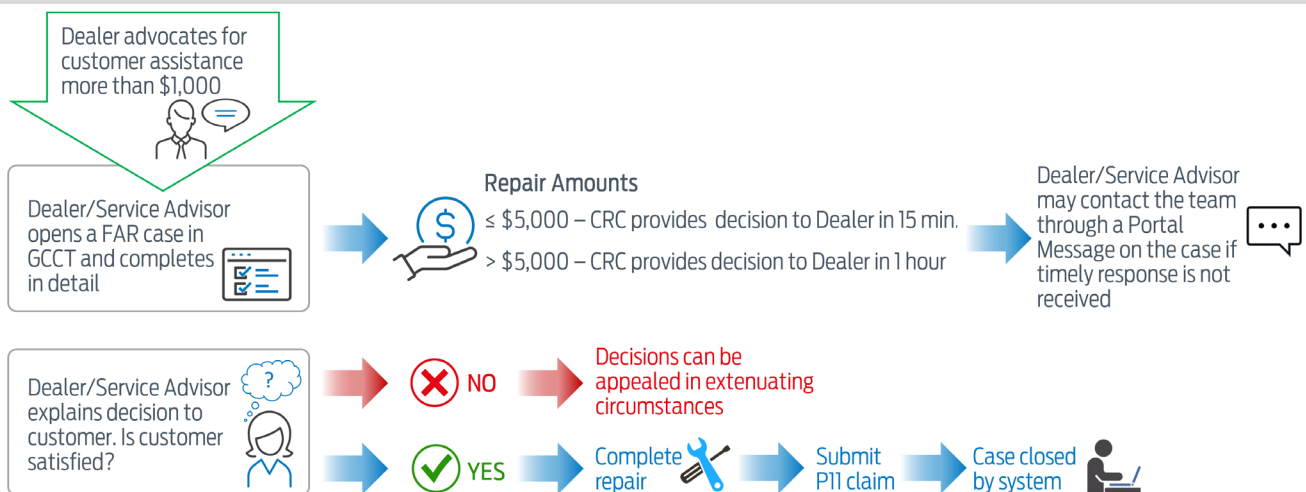


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Other Considerations: Appeals

CRC-approved assistance cannot be adjusted. You will not be able to supplement or override the assistance with additional Ford goodwill funding. CRC decisions can be appealed in exceptional circumstances. For example:

- The initial decision rendered is not accepted and you believe there is additional rationale that warrants sending an appeal to the CRC. Provide the additional facts in the case and indicate that you are seeking an appeal based on this additional information. The CRC will then review and make a decision
- You can find more CRC contact information at: [FMCDealer.com / Parts & Service / Customer Support Resources / Customer Relationship Center – Dealer / Customer Support](https://www.ford.com/dealer/customer-support)
- Appeal reminders:
 - Submit an appeal by adding the reason for the appeal in a Portal Message on the case
 - Appeal decisions make take up to 24 hours to be posted in GCCT
 - If the case is closed and you wish to appeal the decision, please email your DXS as they no longer have line of sight on closed cases and will not see updates added by the Dealer



KEY RESOURCE

Learn about other Dealers' experiences with the CRC Fast Path, including viewpoints, success stories and best practices. View the CLP Dealer Testimonial Video for CRC Fast Path: Repairs > \$1,000 [here](#).

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Keep Them Moving

What It Is

Keeping customers moving with reliable transportation while you handle their repair is an important consideration for some customers. This is another type of goodwill offering, beyond financial assistance, and it can come in many different forms like shuttle, Uber/Lyft, taxi or loaner.

Although transportation assistance is not part of the vehicle warranty, the Ford Customer Loyalty Program offers assistance to help with the cost of customer transportation requests.

The Keep Them Moving element of the Ford Customer Loyalty Program gives Dealers the ability to help customers get where they need to be while their vehicle is being repaired. **You are empowered to provide up to 10 days of Warranty Loaner Assistance** to customers using your Warranty Loaner Assistance budget.

Ask customers what they need. Many customers may only require, or prefer, a rideshare service or a Ford shuttle versus a loaner vehicle. It's up to you to determine if the customer needs assistance getting somewhere and the best transportation options to help them. This also includes communicating with the customer so that they can plan and arrange their own transportation if the Dealer cannot offer transportation assistance.

Remember that a loaner is not an automatic offering. It's not part of the customer warranty. However, customers do expect that you will endeavor to take some of the inconvenience out of the repair situation by providing transportation support when you can and if it's needed.

It's critical to monitor and manage your Warranty Loaner Assistance budget (PRENT). For details on how to monitor the dealership's Warranty Loaner Assistance budget (PRENT), click [here](#) in this guide.

The Ford Customer Loyalty Program includes a centralized budget to cover Alternative Transportation claims for things like Ford Courtesy Shuttles and ride-hailing services like Uber/Lyft, taxis, etc. Claiming for these options will not use your allocated Warranty Loaner Assistance budget.

What to Do: Loaners – Warranty Loaner Assistance Budget

You will be provided with a 6-month Warranty Loaner Assistance budget (PRENT) to assist with providing loaner vehicles to customers on eligible warranty repairs. This is the only Ford Customer Loyalty Program budget assigned to you. It is specifically for situations where a customer needs a vehicle during warrantable repairs on vehicles within warranty. Details include:

- This budget is for warranty repairs on vehicles within the Bumper-to-Bumper 3 years/36,000 miles, Powertrain 5 years/60,000 miles, or Diesel Engine 5 years/100,000 miles warranties
 - Dealer scheduling conflicts (e.g., shop capacity issues) are eligible for Warranty Loaner Assistance budget use within these warranties
 - Dealer can claim up to 10 days (PRENT) for these situations
- Dealerships are empowered to use this budget to provide up to 10 days of loaner transportation for customers
- Loaners beyond 10 days require In-Warranty Loaner process approval before the 10th loaner day
 - Before the 10th day submit an In-Warranty Loaner Request through GCCT
 - Each request is considered on a case-by-case basis for assistance
 - You can request additional days beyond what the In-Warranty Loaner process automatically approves by submitting a Portal Message to request CRC review of the extension request, following the same process you use today
- Unique to Diesel Engine warranty repairs, submit a Rental Financial Assistance case through GCCT

Remedy Type *
Repair (Parts & Labor)
Consequential Expenses
Rental
Refund
Vehicle Payment

- Part delay or technical escalation situations for which a customer requests a loaner follow a separate process (outlined on pages 28 and 29) rather than using your allocated budget. These cases will be routed to your DXS, and approved claims will have loaner days paid under P11 following this process

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- **Dealers must manage their Warranty Loaner Assistance budget to last through the entire budget period.** Once the Warranty Loaner Assistance budget (PRENT) is exhausted, the Dealer will be required to fund additional loaner costs

Details of your dealership's budget allocation, including finding, tracking and viewing claims, can be found on the [Dealer Warranty Dashboard website](#).

Important claim and reimbursement information for loaners:

- Submit Dealer-authorized loaner claims with sub code PRENT
- Loaner reimbursement rates are:
 - Customers who own Ford passenger cars and utility vehicles, Bronco, Maverick, Ranger and Transit Connect – up to \$45/day for FCTP, FRAC or dealership-owned passenger car or utility vehicles (including cost of the vehicle and applicable taxes/fees). If a third-party loaner is used, the reimbursement will be up to \$40/day
 - Customers who own F-Series/E-Series/Transit/Expedition when provided an equivalent loaner vehicle from this group – up to \$60/day (including cost of the vehicle and applicable taxes/fees)
 - Loaners must be claimed at actual cost, up to the per-day limit

Be sure to check out the [Claims section](#) of this document for complete claiming information.

Additional key details for Ford Customer Loyalty Program-related loaners include:

- All loaner vehicles must be 2019MY (or newer) with less than 75,000 miles (effective April 1, 2022)
 - Dealer loaner units and/or third-party vehicles, FCTP and FRAC loaner units must be Ford vehicles
- Vehicles must be clean and well-maintained

What types of vehicles can be used as loaners?

Vehicles must meet the eligibility guidelines of 2019MY (or newer) with less than 75,000 miles. They can be:

- FCTP vehicles*
- FRAC vehicles*
- Dealer loaner units – new or used
- Third-party vehicles

**FCTP and FRAC vehicles must comply with FCTP and/or FRAC loaner eligibility requirements.*

2023 Remote Experience Program

To support Remote Experience, Ford is providing Dealers with an offset to assist with delivering Pickup & Delivery and Mobile Service! Dealers need to enroll in the Remote Experience Program through DPES to participate. The program will be administered through the Incentives Connection platform and tracking will be available in February.

Participating dealers will receive an offset for each qualifying Remote Experience (Pickup & Delivery and Mobile Service), delivered to a customer in accordance with program standards. The program is available to all eligible Ford dealers who are enrolled in Ford Pickup & Delivery and/or Mobile Service and meet the applicable Program standards and criteria.

Pickup & Delivery Key Components:

Offset eligible experiences will have PDEL coded on the Repair Order AND be fully executed through RedCap software.

Mobile Service Key Components:

Offset eligible experiences will include 99PM by Dealers in the Mobile Service Network with an active Telematics account. Offset is eligible on up to six (6) experiences/Repair Orders per day, per unit.



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Remote Experience Offset:

- Dealerships will earn 100% of offset amount for each qualifying Mobile Service event
- Dealerships will earn the following offset amount for each qualifying Ford Pickup & Delivery trip:
 - One-way pickup = 50% of offset amount
 - One-way drop-off = 50% of offset amount
 - Two-way pickup and drop-off = 100% of offset amount
- Remote Experience Offset amount (per experience) established based on an adjusted index of each dealership's warranty labor rate (as of August 2022)
 - Dealers can view their Dealer-specific Remote Experience Offset amount within the Remote Experience Program in DPES or contact their Consumer Experience Specialist
- Repair Orders will be eligible for Remote Experience Offset payment in the month the Repair Order is coded (PDEL/99PM), closed and submitted via Dealer Management System (DMS)
- Tracking will be available within Incentives Connection and paid out on the Dealer Parts Statement the following month

PROGRAM TIMING AND OFFSET ELIGIBILITY	
All Program Standards Met by Date	Eligible for Remote Experience Offset
Initial Automatic Eligibility	January 1, 2023 - February 28, 2023
January 13 - February 28, 2023	March 1, 2023
March 1 - 31, 2023	April 1, 2023
April 1 - 30, 2023	May 1, 2023
May 1 - 31, 2023	June 1, 2023
June 1 - 30, 2023	July 1, 2023
July 1 - 31, 2023	August 1, 2023
August 1 - 31, 2023	September 1, 2023
September 1 - 30, 2023	October 1, 2023
October 1 - 31, 2023	November 1, 2023
November 1 - 30, 2023	December 1, 2023

If at any point the Dealer does not meet the eligibility requirements, Dealer is not eligible for Remote Experience Offset. See [EFC12071](#) for a Program Timing and Offset eligibility details.



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What to Do: Alternative Transportation – Ride-Hailing and Shuttles

Alternative Transportation options offer other ways to keep people moving. These options are centrally funded – they are not processed under the dealership's Warranty Loaner Assistance budget (PRENT).

For customers who just need a one-way trip to home or work, rideshare services like Uber/Lyft and taxis could be an ideal solution. These services offer fast, flexible, convenient scheduling to keep customers moving in a situation where the customer does not need a loaner. Ford Customer Loyalty Program reimbursement is as follows:

- \$15 maximum per customer trip (each way)
- \$30 maximum per Repair Order
- Ride-hailing claims must be claimed as a separate line on the same Repair Order as the qualifying warranty repair, using:
 - Sub code PCLP
 - Causal part “ALTTRANS”
 - Miscellaneous expense code “RIDESHR”
- Limited to warranty repair customers within the Bumper-to-Bumper 3 years/36,000 miles, Powertrain 5 years/60,000 miles, or Diesel Engine 5 years/100,000 miles warranties
- A record of your rideshare activity must be kept and maintained whether via a manual log or hard/electronic copies of receipts. Document rideshare using the best option for your dealership. Examples of documentation include:
 - Keeping the receipt for the customer's rideshare with the Repair Order
 - Keeping a log to track usage including details such as date, customer, cost and Repair Order number
 - If you use a business application offered by a rideshare service (e.g., Uber for Business or Lyft Business), use the available reporting which contains details to align to the customer and Repair Order

Shuttles are another way to assist customers by getting them where they need to be. All service customers, even those with non-warranty repairs, can get where they need to be in a Ford Courtesy Shuttle. Shuttles are reliable, Dealer-controlled and frequently cleaned to ensure a pleasant in-vehicle customer experience.

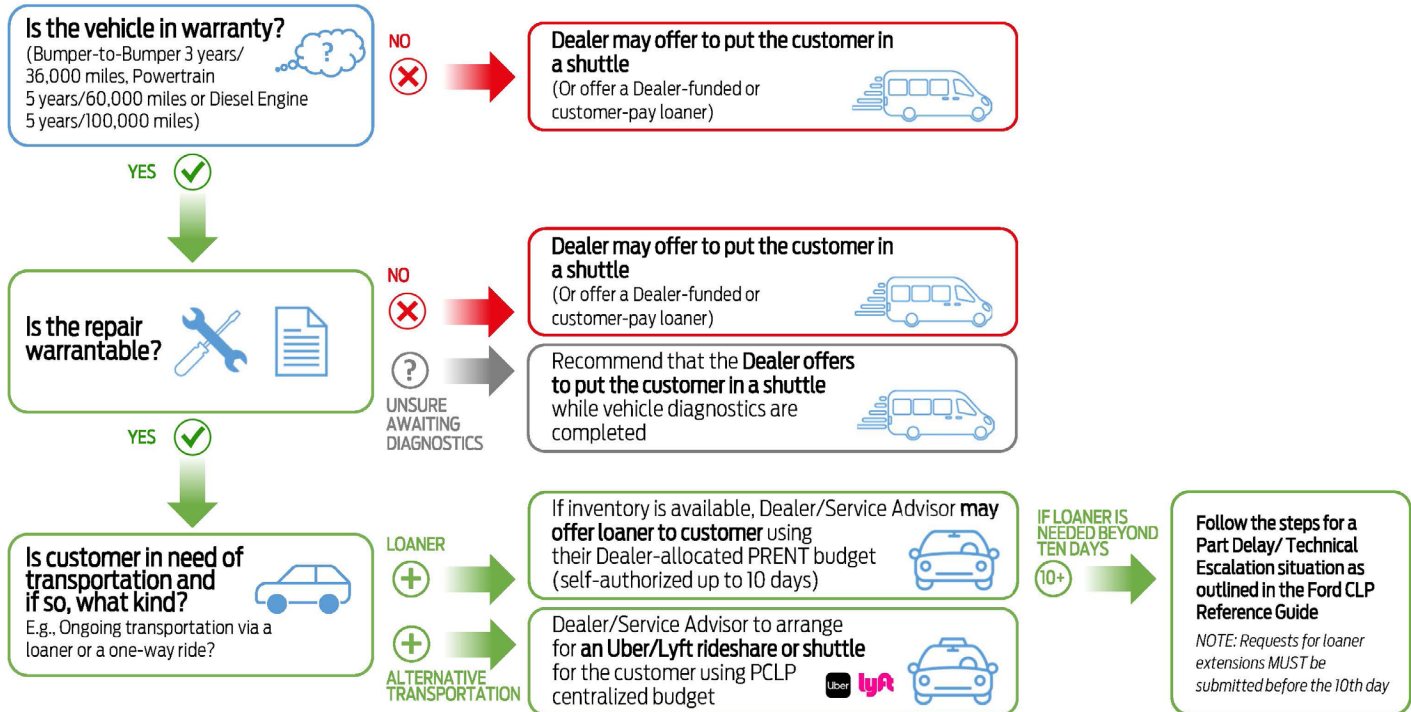
Shuttles must be a 2019MY (or newer) Ford vehicle with less than 75,000 miles. Shuttles do not need to be registered. FCTP vehicles remain ineligible to use as shuttles. FRAC vehicles are not eligible to be used as shuttles. Ford Customer Loyalty Program shuttle reimbursement includes:

- Up to two (2) shuttles per day at \$36 per shuttle (maximum daily reimbursement of \$72 and 27 days per month)
- Claims must be submitted on the VIN being used as a shuttle vehicle
- A log should be maintained showing the number of trips and passengers per trip for each shuttle. A sample shuttle log template can be found on FMCDealer [here](#)
- Process Ford Customer Loyalty Program shuttle claims at least monthly using:
 - Sub code PCLP
 - Causal part “SHUTTLE”
 - Miscellaneous expense code “SHUTTL”
- Claims must be submitted within 30 days of Repair Line Close date
 - Claims submitted more than one month after usage may be subject to chargeback
- There is no warranty repair eligibility requirement for shuttle use



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Dealer Decision Map



Keep Them Moving Reminders

- Use Keep Them Moving to help customers get where they need to be while their vehicle is being repaired, impacting overall customer satisfaction
- Dealers are empowered and self-authorized to provide up to 10 days of Warranty Loaner Assistance to eligible customers using their Warranty Loaner Assistance budget
- Alternative Transportation options (Uber/Lyft, rideshare and/or shuttles) offer additional ways to keep customers moving and are centrally funded



KEY RESOURCE

Learn about other Dealers' experiences with Keep Them Moving, including viewpoints, success stories and best practices. View the CLP Dealer Testimonial Video for Keep Them Moving: Transportation Assistance [here](#).



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What to Do:

Part Delay/Technical Escalation

Sometimes you may need to offer transportation for customers due to a part delay or technical escalation situation.

For Part Delay/Technical Escalation Situations Within the Warranty Period:

- Follow the instructions as defined on FMCDDealer for escalations:

- [Parts Escalation Process](#)
- [Technical Assistance Escalation Process](#)

Please note, it is critical that the appropriate case classification is selected when opening a COPIS case for a “vehicle down” part delay situation.

- Selecting the **Parts Inquiry > Parts Order Status** as the case type places the “vehicle down” part delay request into the correct queue for handling

Select Case Classification

☐ Parts Inquiry > Parts Availability

☒ Parts Inquiry > Parts Order Status

☐ Parts Inquiry > Parts Order Shipment Tracking

Yes Cancel Back Start Over

- Include all required information when submitting these requests, such as the COPIS number or Technical Assistance Center (TAC) Contact ID number
- Submit an In-Warranty Loaner Request form through GCCT before the 10th day
- It's critical to immediately submit these requests. Do not wait until the 10th day because, once approved, payment will be handled through the In-Warranty Loaner process (via the centralized budget), retroactively – back to Day 1. For example:
 - Request submitted before the end of the 10th day: The In-Warranty Loaner process will handle payment retroactive to Day 1
 - Dealers need to have an active IWL case and COPIS Part Order Status Inquiry case (marked “Vehicle Off Road”) for the same VIN to be eligible for auto IWL extension
 - Request submitted Day 16: In this case, the Warranty Loaner Assistance budget (PRENT claim) could be used for Days 1-6 and the IWL case would provide an approval code for the additional days
- Approved claims will have loaner days paid under P11 following this process
- If this process is not followed in a part delay situation, claiming will be under PRENT, utilizing your allocated Dealer Warranty Loaner Assistance budget

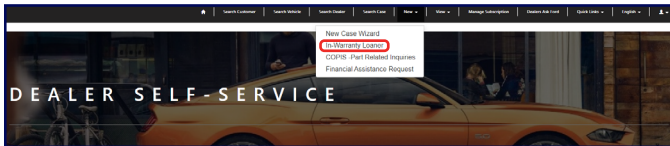


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Warranty Loaner Request Submission Steps

Step 1 – Access GCCT

- From the New tab, select **In-Warranty Loaner**

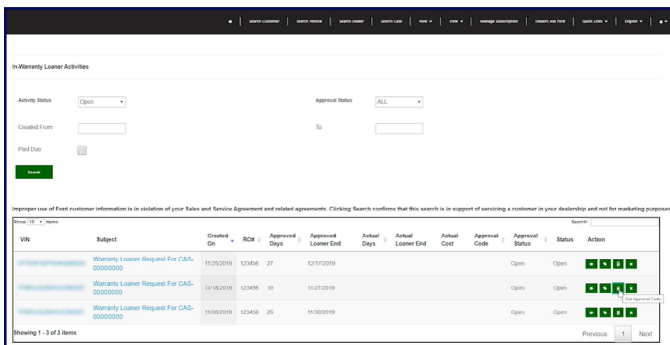


Step 2 – Complete the Warranty Loaner Request form

- Detailed instructions can be found at https://www.fmcdealer.dealerconnection.com/sites/ford_lm/parts_service/cust_sat/GCCT/Pages/InWarrantyLoanerProgram.pdf
- Follow the instructions as defined on FMCDealer for escalations:
 - [Parts Escalation Process](#)
 - [Technical Assistance Escalation Process](#)
- Submit all required information

Step 3 – If GCCT automatically provides the necessary loaner days, move on to Step 4 once the repair is complete. If the system does not automatically extend the IWL end date far enough, add a Portal Message to the case requesting extension from the CRC

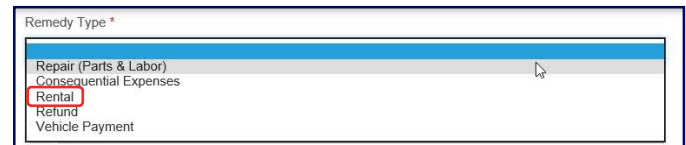
Step 4 – Once the repair is complete, access your In-Warranty Loaner list in GCCT to **generate an approval code**



What to Do: Loaner Assistance Requests Beyond In-Warranty Loaner Guidelines

Rental Financial Assistance Case

Loaner assistance may be considered to assist customers who are out of warranty for repairs that would have been covered under the Bumper-to-Bumper, Powertrain or Diesel Engine warranties. Dealer must submit a rental request in GCCT via a Rental Financial Assistance Request case prior to providing a loaner vehicle to the customer.



Decisions are determined based on the following:

- Time and mileage criteria
- CLV criteria
- Whether the repair would have been covered under warranty
- Confirmation that the unit is not driveable
- Response from COPIS with an ETA > 10 days on the part or no ETA
- Response that the Dealer is working with TAC/FSE and an ETA on when the unit will be repaired
- Dealer submitted a rental request in GCCT upfront prior to providing a loaner vehicle to the customer



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Eligibility Guidelines Summary

Eligibility

REPAIRS				
	Amount	Age/Mileage	CLV	Code
Dealer	≤\$1,000	7 years/100,000 miles	≥ 65	PCLP
CRC	>\$1,000	7 years/100,000 miles	≥ 65	P11

WARRANTY LOANER ASSISTANCE				
	Approval Limits	Age/Mileage	CLV	Code
Dealer	10 Days	3 years/36,000 miles, 5 years/60,000 miles or Diesel 5 years/100,000 miles	NA	PRENT
IWL Process and CRC	10+ Days or Part Delay/Tech Assists	3 years/36,000 miles, 5 years/60,000 miles or Diesel 5 years/100,000 miles	NA	P11
DXS Team	10+ Days on Scheduling Conflicts	3 years/36,000 miles, 5 years/60,000 miles or Diesel 5 years/100,000 miles	≥ 65	P11
CRC	10+ Days for Part Delay/Tech Assists	Beyond IWL guidelines	≥ 65	P11

Note: DXS Supervisor can review and approve rental request outside of guidelines on a case-by-case basis if a Dealer is appealing with a Business Case.

ALTERNATIVE TRANSPORTATION			
	Amount	Age/Mileage	Code
Shuttle – Maximum Two (2) Shuttles	\$36/day, up to 27 days per shuttle	NA	PCLP
Ridesharing	\$15/segment – Max \$30/customer	3 years/36,000 miles, 5 years/60,000 miles or Diesel 5 years/100,000 miles	PCLP



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Non-Eligibility

Warrantable repairs and repairs covered under Field Service Actions should always be claimed under the applicable Ford New Vehicle Limited Warranty or published FSA guidelines. In addition to those Non-Reimbursable Conditions found in the Warranty & Policy Manual, the following items are NOT eligible for coverage under the Ford Customer Loyalty Program and are subject to chargeback:

- Repairs that are already covered by a Ford Protect (ESP) or non-Ford Extended Service Contract
- Repairs made to vehicles with branded titles. Vehicles with partial warranty cancellations (as noted in OASIS) are not eligible when the failed part is within the area of cancellation
- Non-Ford vehicles
- Vehicle modification or non-Ford-Authorized Accessory purchase and/or installation
- Removal of aftermarket modifications to access factory-installed parts to complete a repair
- Any Dealer-owned vehicles, including used vehicles in Dealer stock
- Internal dealership repairs (e.g., paint repairs on a new delivery)
- Dealership employees who do not have their vehicle in for repair
- Non-Service customers (e.g., Sales demos; Ford Customer Loyalty cannot be used as a sales incentive tool)
- Reimbursement to Dealer(s) for repeat repairs
- Deductibles, including Ford Protect (ESP) or non-Ford Service Contract, cannot be reimbursed
- Claims/repairs that have been previously submitted for payment under warranty or Ford Protect (ESP) and returned unapproved, unpaid or adjusted
- Claims related to accidents, fires, floods, road hazards and/or other insurance-related matters
- Dealer administration issues (late claim submissions, failure to obtain prior approval, etc.)
- Cost of loaner that is kept beyond the completion of the eligible repair. The customer or Dealer is responsible for this expense

- Loaners or transportation already covered by a Ford Protect (ESP) contract with rental benefit coverage, which may include reimbursement for receipted expenses for a rental car or alternative public transportation such as Uber, Lyft or other modes of public transportation. For Dealers on a Ford Protect Retrospective or Reinsurance structure, you may utilize FLP funds prior to using rental vehicle coverage provided by the Ford Protect contract if desired. If any other available coverages exist, they should be utilized before the Ford Customer Loyalty Program
- Lincoln vehicles are not eligible for Ford Customer Loyalty benefits or funds. To assist a Lincoln customer, please open a GCCT Financial Assistance Request with the Lincoln VIN and it will get appropriately routed for consideration

Ford Customer Loyalty Budget – Dealer Responsibility

Abuse of the Warranty Loaner Assistance budget and Empowerment/Alternative Transportation (PCLP) claiming may result in loss of Ford Customer Loyalty Program budget privilege. Abuse would include, but is not limited to:

- More than one PRENT claim line per repair event (exceeding the self-approval of 10 days per repair event)
- Loaners or Alt Trans provided for non-qualifying service (e.g., maintenance, FSA, etc.)

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Claims

Quick Reference Guide

The Ford Customer Loyalty Program includes only three codes for claiming:

- 1) PCLP** – For the empowerment repair claims you approve as well as for Alternative Transportation claims, including shuttles
- 2) P11** – For CRC-approved repair claims or In-Warranty Loaner process and CRC-approved loaners
- 3) PRENT** – For loaner claims that you authorize from your Warranty Loaner Assistance budget

When processing claims, remember:

- Claims must be submitted in OWS within 30 days of the Repair Line Close date
- Process claims monthly to ensure timely reimbursement
- Dealer-authorized repairs require an approval code which is obtained through the CLV Calculator
- CRC-authorized repairs require an approval code which is issued via the CRC

FOR REIMBURSEMENT ON ...	Sub Code	Causal Part	Miscellaneous Expense
GOODWILL REPAIRS			
Dealer-Authorized Repairs ≤ \$1,000	PCLP		
CRC-Authorized Repairs > \$1,000	P11		
ALTERNATIVE TRANSPORTATION			
Ford Shuttle	PCLP	SHUTTLE	SHUTTL
Ride-Hailing Service	PCLP	ALTTRANS	RIDESH
LOANERS			
Dealer-Authorized ≤ 10 Days	PRENT	RENTAL	RENTAL
IWL Process and CRC-Authorized > 10 Days	P11	RENTAL	RENTAL

Note: Claims must be submitted within 30 days of the repair line completion.



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Warranty Loaner Assistance Budget (PRENT) – Claim Review and Budget Tracking

Follow these steps for loaner claim review and allocation budget tracking through the CLP Dashboard:

Find Your Dealership Warranty Loaner Assistance Budget and Track Usage

Step 1: Access the Dealer Warranty Dashboard:

https://www.fmcdealer.dealerconnection.com/sites/ford_lm/parts_service/wty/Pages/wtcl.aspx

Step 2: Locate your CLP budget in the bottom-right corner of the screen

Warranty Excellence Status
Achieved

6 Months Data

	Repair Cost Variance	Potential Repeat Repair	RO Open to Close Time	RO Close to Submit Time	Claims First Time Through	Total
6 Months Data	50	20	10	10	10	100
Dealer Assessment Score (DAS)	50.00	20.00	0.00	10.00	5.00	85

Warranty Categories to Monitor Closely This Month
Click any title for more details

Engine • Ignition • Transmission • Clutch and Exhaust • Chassis • Body • Electrical • Overall

Claims with Large Repair Variance Click Here

Annual WPAC OTE

Dealer Decided Claim Reversal

CLP Budget – 2023 First Half (Jan 1 – Jun 30, 2023)

	Current	Used	Available
Ford Wty Loaner Assistance Budget	\$7,602	\$0	\$7,602

Step 3: Click on the Resources button to view your dealership's CLP Dashboard

Resources

- Warranty Dashboard Job Aids
- Warranty & Policy Manual
- Claims Lists
- Tool Box
- Dealer Information
- Dealer Actual time Report
- CLP Dashboard**
- Q & A
- DIRRP



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Step 4: Click on the CLP Dashboard

- Your budget details for the current program period will appear in the top-left
- Your budget summary, including budget used to date, will appear in the center
- The Previous Program Period box will contain information from the prior budget period
- The Budget Utilization and Loyalty Spend by Month vs. Recommended Pace charts will appear once you begin to process claims under the new program

<div>Customer Loyalty Program</div>		00000 – Anytown Motors, Inc.		<div>?</div> <div></div>			
Budgets		Metrics		Reports			
Current Program Period:		CLP Budget Summary		Previous Program Period:			
2023 First Half (Jan. 1 – June 30, 2023)		<div></div>		2022 Second Half (July 1 – Dec. 31, 2022)			
Original Wty Loaner Assistance Budget				\$7,602	Original Loyalty Budget		\$7,602
Budget Adjustment				\$0	Budget Adjustment		\$0
Current Wty Loaner Assistance Budget				\$7,602	Current Loyalty Budget		\$7,602
Used Budget to Date				\$7,602	Used Budget to Date		\$0
Remaining Wty Loaner Assistance Budget				\$0	Remaining Loyalty Budget		\$7,602
% Utilization				100%	% Utilization		0%
Recommended Pace Utilization				100%	Recommended Pace Utilization		0%
Empowerment (PCLP) Spend				\$13,478	Number of Claims Over Budget Remaining		0
Central spend P11				\$83,120	Central spend		0

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Step 5: View your Budget Performance Report

- Click on **Reports**
- Choose **Budget Performance Report** from the selection list on the left

Customer Loyalty Program 00000 - Anytown Motors, Inc.

Budgets Metrics Reports

Warranty Management System CLP Program Reports

Customer Loyalty Program Budget Report

Select time Period: 2023

Submit Reset

CLP BUDGET SUMMARY AS OF: 01/01/23

DEALER P&A CODE 00000

Ford - Current Wty Loaner Assistance Budget \$ 7,602

Ford - Current Wty Loaner Assistance Funds Available \$ 7,602

- Click the **Submit** button to display the Budget Performance Report
- Your report will display showing the amount of the budget used to date, as well as the amount of budget remaining for the period

Loyalty Programs

2023 Budget Performance as of 01/01/2023

Dealer: 00000 Anytown Motors

Repair Date Period:
FORD - January 1, 2023 through June 30, 2023
please scroll down to view prior budget period(s) within current budget year

PRENT

Base Budget:	7,602
CVC Increase:	0
Total Budget:	7,602
Budget Used:	0
Budget Available:	7,602

Report Name: trends/fex/claims/CLP_BUDGET_REPORTFL2021.fex.period1



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Find Your Warranty Loaner Assistance Budget PRENT Claims

Step 6: While still under the Reports tab, choose **Claims List Report** from the selection list on the left

Step 7: Click on **Submit** to view your Claims Report

- Your PRENT claims will be grouped together under the PRENT category
- You have an option to download a PDF or Excel version of the claim summary

Customer Loyalty Program Claims List															
Dealer Code: 00000 - Anytown Motors, Inc.															
Region: XX Zone: A00															
Repair Date: 2021/01/01 to 2021/12/31															
VIN	R.O. Number	Rpr Nbr	Mileage	Svc Advisor	Warranty Start Date	Repair Date	Payment Date	Sub Code	Causal Part	Parts Cost	Labor Cost	Misc Cost	Cust. Partic.	Dealer Partic.	Net Cost
Ford PRENT Claims:															
1FA6	8138	07	1,000					PRENT	RENTAL	.00	.00	210.00	.00	.00	210.00
1FA6	7629	06	33,096					PRENT	RENTAL	.00	.00	120.00	.00	.00	120.00
1FA6	9838	03	10,734					PRENT	RENTAL	.00	.00	90.00	.00	.00	90.00
1FME	1515	05	17,133					PRENT	RENTAL	.00	.00	350.00	.00	.00	350.00
1FME	0275	03	13,030					PRENT	RENTAL	.00	.00	175.00	.00	.00	175.00
1FME	7478	04	6,351					PRENT	RENTAL	.00	.00	350.00	.00	.00	350.00
1FME	8238	3	6,352					PRENT	RENTAL	.00	.00	30.00	.00	.00	30.00
1FME	0235	03	7,761					PRENT	RENTAL	.00	.00	350.00	.00	.00	350.00
1FME	8630	02	21,811					PRENT	RENTAL	.00	.00	60.57	.00	.00	60.57
1FMK	4717	06	18,635					PRENT	RENTAL	.00	.00	350.00	.00	.00	350.00
1FMK	9242	04	5,461					PRENT	RENTAL	.00	.00	300.00	.00	.00	300.00
1FMJ	7762	03	43,361					PRENT	RENTAL	.00	.00	350.00	.00	.00	350.00
1FMJ	1286	04	28,705					PRENT	RENTAL	.00	.00	300.00	.00	.00	300.00
1FMJ	8788	10	40,281					PRENT	RENTAL	.00	.00	300.00	.00	.00	300.00
1FMJ	9271	05	8,607					PRENT	RENTAL	.00	.00	60.00	.00	.00	60.00
1FMJ	6785	05	37,985					PRENT	RENTAL	.00	.00	350.00	.00	.00	350.00
1FMJ	9852	03	33,881					PRENT	RENTAL	.00	.00	240.00	.00	.00	240.00
1FMS	4978	04	17,690					PRENT	RENTAL	.00	.00	350.00	.00	.00	350.00
1FMS	1923	06	8,539					PRENT	RENTAL	.00	.00	350.00	.00	.00	350.00
1FT7	1937	04	8,426					PRENT	RENTAL	.00	.00	270.00	.00	.00	270.00
1FT7	7846	03	22,280					PRENT	RENTAL	.00	.00	270.00	.00	.00	270.00
1FT8	8835	04	13,459					PRENT	RENTAL	.00	.00	.00	.00	.00	.00
1FT8	8835	05	13,460					PRENT	RENTAL	.00	.00	350.00	.00	.00	350.00
1FTE	9107	04	14,505					PRENT	RENTAL	.00	.00	120.00	.00	.00	120.00
1FTE	8555	02	32,118					PRENT	RENTAL	.00	.00	300.00	.00	.00	300.00
1FTE	1260	03	20,742					PRENT	RENTAL	.00	.00	140.00	.00	.00	140.00
1FTE	6875	04	14,877					PRENT	RENTAL	.00	.00	181.69	.00	.00	181.69
1FTE	0877	04	4,333					PRENT	RENTAL	.00	.00	280.00	.00	.00	280.00
1FTE	7436	03	9,562					PRENT	RENTAL	.00	.00	350.00	.00	.00	350.00
1FTE	6237	05	29,333					PRENT	RENTAL	.00	.00	350.00	.00	.00	350.00
1FTE	4565	03	11,674					PRENT	RENTAL	.00	.00	333.09	.00	.00	333.09
1FTE	6514	02	28,734					PRENT	RENTAL	.00	.00	350.00	.00	.00	350.00
1FTE	7710	2	12,250					PRENT	RENTAL	.00	.00	350.00	.00	.00	350.00
1FTE	2638	02	5,068					PRENT	RENTAL	.00	.00	350.00	.00	.00	350.00
1FTE	4788	03	18,063					PRENT	RENTAL	.00	.00	151.42	.00	.00	151.42
1FTE	0068	03	46,352					PRENT	RENTAL	.00	.00	350.00	.00	.00	350.00
1FTE	3839	04	24,936					PRENT	RENTAL	.00	.00	211.97	.00	.00	211.97
1FTE	9854	10	49,645					PRENT	RENTAL	.00	.00	350.00	.00	.00	350.00
1FTF	4833	06	51,034					PRENT	RENTAL	.00	.00	175.00	.00	.00	175.00
1FTF	4764	04	2,500					PRENT	RENTAL	.00	.00	175.00	.00	.00	175.00
1FTF	4718	04	59,312					PRENT	RENTAL	.00	.00	350.00	.00	.00	350.00
1FTF	0944	03	59,322					PRENT	RENTAL	.00	.00	350.00	.00	.00	350.00
1FTF	1518	03	59,335					PRENT	RENTAL	.00	.00	350.00	.00	.00	350.00
2FME	7365	08	4,724					PRENT	RENTAL	.00	.00	350.00	.00	.00	350.00
3FA6	8411	04	29,998					PRENT	RENTAL	.00	.00	350.00	.00	.00	350.00

Report Name: trends/fex/claims/CLP_CLAIMS_LISTFL.fex

WARRANTY SUPPORT AND COUNSELING

Report Date: 11/02/21

View Your Warranty Loaner Assistance Budget PRENT Claims

Step 8: For additional claim reporting options, select the **Enhanced Claims List Report**



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Frequently Asked Questions

Dealer Empowerment ≤ \$1,000

What are the time and mileage guidelines for Ford Customer Loyalty Program repair assistance?

Ford vehicles with a valid Warranty Start Date are eligible for support up to 7 years/100,000 miles subject to the exclusions found in the non-eligibility section of this guide.

Are used vehicles eligible for repair assistance?

Yes.

Can more than one Dealer Empowerment claim be submitted on the same RO?

Dealer Empowerment can be used on a single repair event ≤ \$1,000. Keep in mind that a single repair event cannot be broken into smaller repairs to get within the \$1,000 empowerment limit. Repair events > \$1,000 should be escalated using the CRC Fast Path.

Can Dealers utilize Ford Customer Loyalty funds to purchase a surprise and delight gift for customers?

No. Funds cannot be used to purchase a surprise and delight gift for customers.

Are consequential expenses, such as hotels, travel, food or lost wages, covered?

Yes. This requires a Financial Assistance Request to the CRC for consideration and approval to submit as P11.

Can Ford Customer Loyalty Program assistance be used toward a vehicle payment in certain circumstances?

Yes. This requires a Financial Assistance Request to the CRC for consideration and approval to submit as P11.

Can a Dealer use Ford Customer Loyalty Program assistance on a non-Ford Extended Service Contract?

Ford Customer Loyalty does not cover repairs that are already covered by any other means, including a non-Ford Service Contract. The vehicle and the customer are not excluded because they purchased a non-Ford contract; however, other available coverages must be utilized first.

Is it a requirement that the Dealer/customer participate in the Ford Customer Loyalty Program, i.e., contribute toward the repair cost?

It is appropriate to have both Dealers and customers participate. The CLV Calculator will provide how much Ford will participate and any remaining amount needs to be customer and/or Dealer participation.

Are Ford Customer Loyalty claims at warranty rates, or can we charge something more or less?

Ford Customer Loyalty Program repair claims must follow warranty processing rules. Claims must be at Ford warranty labor rates, warranty part rates and use Ford Service Labor Time Standards. Ford-sourced and/or Ford remanufactured parts are required. Fleets with specific negotiated rates follow their established rates.

Is the dealership required to include the CLV score when submitting a Ford Customer Loyalty Program claim?

No. The CLV score is not required with the claim.

If the customer is a subsequent owner or it's a Certified Pre-Owned (CPO) vehicle, can I use my Ford Customer Loyalty Program funds to assist?

Yes.

Can Dealer Empowerment funds be used toward loaner reimbursement?

No, Dealer Empowerment funds are to be utilized only for assistance on repairs ≤ \$1,000 within program eligibility guidelines.

Can a Dealer offer Ford Customer Loyalty funds toward a new vehicle purchase?

No. Ford Customer Loyalty funds cannot be offered as a sales incentive or marketing tool toward purchase of a new vehicle.

How does the Dealer determine the amount of assistance (≤ \$1,000) provided to each customer?

The amount of customer assistance is determined by using the CLV Calculator, which can be found at the [GCCT site](#). Dealers need to enter the repair amount and vehicle mileage to receive an output with the recommended Ford Customer Loyalty Program percentage award.



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What if the CLV Calculator does not provide a CLV score?

In the event where a customer's CLV score does not automatically appear, the system will display three questions for you to answer using dropdown choices for – Purchase History, Ownership Status and Service History. Once answered and submitted, the system will proceed with the calculation.

Why does the CLV Calculator provide a range?

In addition to the recommended percentage, the calculator also provides a Ford Customer Loyalty Program approved range that can be considered, in special circumstances, when determining the amount to award the customer.

What should the Dealer do if the CLV Calculator results (percentage) are lower than expected?

The calculator tool results are intended to provide you with a guideline for determining the amount of assistance to be given to the customer. Keep in mind that it is appropriate that both the dealership and the customer participate in the repair costs. You need to fully assess each situation and determine the amount of assistance that should be offered to the customer ≤ the \$1,000 limit.

What if the total repair cost is just over the \$1,000 maximum coverage (e.g., \$1,100)?

If the repair cost (at warranty rates) exceeds \$1,000, the case must go to the CRC. Dealers are not authorized to offer partial assistance. Any repair cost more than \$1,000 must have a GCCT financial assistance case submitted for handling by the CRC.

Can taxes be claimed on repair costs?

No. Per the Warranty & Policy Manual, sales tax is not reimbursable on any Ford Customer Loyalty Program.

Is any action needed if a Dealer denies assistance for a repair?

Yes. The Dealer is required to enter this information and decision in the GCCT system. This ensures that the CRC as well as other Dealers and Corporate are aware of the case history.

Are loaner vehicle expenses included in the \$1,000 maximum repair amount?

Loaner costs are not included in the \$1,000 repair; they are a separate item.

Is there a limit to how many claims (less than/greater than \$1,000) a Dealer can make?

While there is no limit to how many claims a Dealer can make, Dealers need to use good judgment when considering Ford Customer Loyalty Program assistance within the eligibility parameters. Ford Customer Loyalty Program assistance is for customers with a CLV of 65 or greater.

Can Ford Customer Loyalty Program funds be used at secondary/satellite P&A Codes?

Yes. However, all claims must be processed using the primary P&A Code.

Can a Dealer use Ford Customer Loyalty Program funds toward paying a customer's deductible (Ford or Ford Protect/ESP)?

No. Ford Customer Loyalty Program funds may not be used to cover this expense.

Can a Dealer use Ford Customer Loyalty Program funds toward a refund request?

Yes. Refund requests will be covered ≤ \$1,000. Use the CLV Calculator to arrive at a recommended amount of assistance.

Does the customer need to acknowledge Ford Customer Loyalty Program assistance?

Yes. The dealership should prepare the Customer Goodwill Award form, indicating the type of assistance provided and participation, if any. This should be signed by Dealer Management and the customer and filed with the Repair Order in the vehicle service file at the dealership. The Ford Customer Loyalty Program Customer Goodwill Award form is embedded in the CLV Calculator.

Can Ford Customer Loyalty Program funds be used for maintenance items (e.g., oil changes, tires, wipers, etc.)?

No. Maintenance repairs are not eligible. Only warrantable type repairs are eligible.

Can Ford funds be used for Lincoln customers?

Ford Customer Loyalty Program funds cannot be used on Lincoln vehicles. In the event a Lincoln client requests customer assistance or a warranty service loaner, the Ford Franchise servicing dealership must open a case with the CRC using **Dealer – Vehicle Concerns / CSM Assistance Request / Financial Assistance / Lincoln**.



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What is the process to offer a Ford Protect (ESP) plan to a customer under the Customer Loyalty Program?

Open a GCCT case for the CRC Team to evaluate.

Note: Ford Protect goodwill contracts will not cover preexisting conditions.

Can repair spending be authorized for vehicles with branded titles?

Vehicles with branded titles are not eligible for Ford Customer Loyalty Program support. Vehicles with partial warranty cancellation (as noted in OASIS) are not eligible for Ford Customer Loyalty Program support when the failed part is within the area of cancellation.

Can a Dealer use Ford Customer Loyalty Program funds for their employees?

Dealer employees may qualify for Ford Customer Loyalty Program support; however, each request needs to be approved by the CRC.

CRC Fast Path > \$1,000

For repair costs greater than \$1,000 (but < \$5,000), what should be done if the CRC doesn't provide a decision within 15 minutes?

It's important to note that higher-cost repairs drive case-handling complexity and could increase response time in some instances. If a timely response is not received, you may reach out to the CRC Fast Path Team for an update. The team number can be found on FMCDealer [here](#). Calls should only be made to follow up on a previously submitted case or an appeal; cases cannot be opened via phone.

For repair costs greater than \$1,000, who should contact the CRC?

For repairs more than \$1,000, Dealers should create a Fast Path case with Financial Assistance Request details.

What if a Ford Customer Loyalty Program claim is rejected?

Review the OWS message for the reason that the claim was rejected. If there is a problem with the approval code, contact the CRC.

What should Dealers do if there is a disagreement with the CRC's decision on a claim for repairs greater than \$1,000?

Generally, the CRC's decision is final. However, if there are special circumstances related to the case, it can be appealed through the CRC.

Keep Them Moving

What is the time period for the Ford Customer Loyalty Program?

January 1 – December 31, 2023. Dealer budgets will be allocated for the following periods:

- January 1 – June 30, 2023
- July 1 – December 31, 2023

Please keep in mind that Ford Customer Loyalty Program claims are paid from Dealer budgets based on the Repair Order Open date.

Where do I find my Warranty Loaner Assistance budget? Where do I find my claims?

Current period Ford Dealer Warranty Loaner Assistance budgets and claim lists may be viewed via the CLP Dashboard located under the Resources tab on the Dealer Warranty Dashboard.

Does a newly appointed Dealer automatically receive a Ford Customer Loyalty budget? When do I receive my funds? Why did I not receive the entire amount?

Newly appointed Dealers will receive a Warranty Loaner Assistance budget allocation based on sales volume, UIOs, loaner utilization and more. It will be issued in alignment with the Region. For transfer (buy/sell) Dealers, the remaining allocation from the resigning Dealer will be distributed to the appointed Dealer within 30 days after the market wire resignation/appointment effective date.

A dual dealership received budgets for both franchises. Can these budgets be combined, or can funds be transferred between budgets?

No. Dual dealerships cannot move funds between Ford Customer Loyalty and Lincoln Loyalty budgets.




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Do any of my Ford Customer Loyalty funds not used by the end of the year roll over to the following year?

Unused budget does not “roll over” to the following period. Funds are distributed as noted above and expire at the end of the “half,” on June 30 and December 31, 2023, respectively.

Can Ford Customer Loyalty Program be used on Ford Protect (ESP)?

Yes. Ford Warranty Loaner Assistance may be used to provide additional loaner days beyond the Ford Protect (ESP) loaner coverage after the loaner benefit is exhausted. This may include reimbursement for receipted expenses for a rental car or alternative public transportation such as Uber, Lyft or other modes of public transportation. For Dealers on a Ford Protect Retrospective or Reinsurance structure, you may utilize loaner funds prior to using rental vehicle coverage provided by the Ford Protect contract if desired. If any other available coverages exist, they should be utilized before the Ford Customer Loyalty Program.

What types of vehicles can be used as loaners?

Vehicles must meet the eligibility guidelines of a 2019MY (or newer) Ford vehicle with less than 75,000 miles. They can be:

- FCTP vehicles*
- FRAC vehicles*
- Dealer loaner units – new or used
- Third-party vehicles

My dealership provides a Lincoln vehicle as a loaner to a Ford owner. What rate is applied?

A Lincoln loaner is eligible for coverage under the Ford Customer Loyalty Program, but the reimbursement is at the Ford Customer Loyalty rate (\$45/day for a Dealer-owned loaner).

What should a Ford Dealer do if/when the allocated Warranty Loaner Assistance budget has been depleted?

The budget must be managed closely to ensure funds are available throughout the half. Additional funding will not be allocated. Dealers should consider utilizing Alternative Transportation options during the period to help customers as well as augment their allocated loaner funding. The exception is for part delay/technical escalation requests – these requests can still be submitted to the CRC with required documentation even if the Warranty Loaner Assistance budget is depleted.

What are the daily rates for rental vehicles?

- Ford passenger cars and utility vehicles, Bronco, Maverick, Ranger and Transit Connect: up to \$45/day
 - If a third-party loaner is used, the reimbursement will be up to \$40 per day.
- Ford F-Series/E-Series/Transit/Expedition: up to \$60/day

Can taxes be claimed on loaner costs?

Yes. The cost of the loaner (inclusive of sales tax) is reimbursable up to the \$45/\$60 maximum reimbursement amount.

Is there a time and mileage restriction for shuttle vehicles?

Yes. Shuttle vehicles must be a 2019MY (or newer) Ford vehicle with less than 75,000 miles.

What is the rate when claiming shuttles?

The daily rate for shuttles is \$36/day regardless of the number of trips taken in a day with a maximum of two (2) shuttles per Dealer, up to 27 days per month.

Do I need to register my shuttle vehicles?

Shuttle registration is no longer required.

Is a FRAC or FCTP vehicle eligible for shuttle service?

FCTP vehicles are not eligible for shuttle service. FRAC units are not eligible for shuttle service. Dealer units being placed in shuttle service must be a 2019MY (or newer) Ford vehicle with less than 75,000 miles.

How many loaner days can Ford Dealers self-authorize?

The Ford Dealer self-authorization for loaners is 10 days. More than 10 days requires approval through the In-Warranty Loaner process or from the CRC **before** the 10th day.

On part delay situations, Dealers should engage the In-Warranty Loaner process as soon as possible for loaner consideration and review for approval.

Can I provide a non-Ford loaner vehicle to a customer?

No, the temporary suspension of the Ford-only vehicle requirement ended June 30, 2023. All customers eligible for a loaner vehicle must be provided with Ford loaner vehicles for reimbursement under the Ford Customer Loyalty Program.

*FCTP and FRAC vehicles must comply with FCTP and/or FRAC loaner eligibility requirements.



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How should Dealer loaners for part delay and technical assistance situations be handled?

Follow the existing guidance outlined in the current Part Delay process or the Technical Escalation process on FMCDealer.

- Include all required information when submitting these requests, such as the COPIS number or Technical Assistance Center (TAC) Contact ID number
- Submit an In-Warranty Loaner Request form through GCCT before the end of the 10th day
 - It's critical to immediately involve the CRC on these requests. Do not wait until the 10th day because **the CRC will handle payment through the In-Warranty Loaner process (via the centralized budget), retroactively – back to Day 1 – once the request is approved.** For example:
 - Request submitted before the end of the 10th day: The In-Warranty Loaner process will handle payment retroactive to Day 1
 - Request submitted Day 16: In this case, the Warranty Loaner Assistance budget (PRENT claim) could be used for Days 1-6 and the CRC would provide an approval code for the additional days
 - Approved claims will have loaner days paid under P11 following this process
 - If this process is not followed in a part delay situation, claiming will be under PRENT, utilizing your allocated Dealer Warranty Loaner Assistance budget

How should the Dealer process loaner claims under the Ford Customer Loyalty Program?

Loaner claims should be submitted as a separate line on the same Repair Order with the repair itself, using causal part of RENTAL and miscellaneous expense code RENTAL.

- Dealers are required to submit the number of loaner days provided in the quantity field for miscellaneous expense code "RENTAL"
- Dealers are required to submit the 17-character VIN of the loaner vehicle in the "Special Use Vehicle" field
- Dealer-authorized loaners up to 10 days are submitted with sub code PRENT
- In-Warranty Loaner and CRC-approved loaners are submitted with sub code P11

What are the Alternative Transportation Program claiming limits?

- Uber/Lyft/taxi reimbursement is \$15 maximum, each way, or \$30 total per Repair Order
- Expanded shuttle reimbursement
 - Can be used to support any service customer
 - Claiming for up to two (2) shuttles per day at \$36 per shuttle allowed (\$72 maximum reimbursement per day)

How should the Dealer process a Ford Customer Loyalty Program shuttle claim?

Shuttle claims are to be processed at least monthly using program code PCLP and requires causal part "SHUTTLE" and miscellaneous expense code "SHUTTL." Refer to the [Claims section](#) for instructions.

Can Warranty Loaner Assistance be used for Ford customers having recalls or other Field Service Actions performed?

No. If the Field Service Action has a loaner provision, the loaner must be claimed according to the provisions stated in the recall/FSA. If there is no loaner provision stipulated, loaner assistance is not reimbursable.

Can rideshare be claimed for Ford customers having recalls or other Field Service Actions performed?

No. Rideshare claiming is limited to warranty repair customers within the Bumper-to-Bumper 3 years/36,000 miles, Powertrain 5 years/60,000 miles, or Diesel Engine 5 years/100,000 miles warranties. If the Field Service Action has a transportation provision, it must be claimed according to the provision stated in the recall/FSA.

Are Fleet customers eligible for goodwill or transportation assistance?

Fleet customers are eligible under the program guidelines. However, in situations where a dealership has negotiated their labor rate to offer a discounted rate to a fleet and/or established specific wholesale part markup, those negotiated rates apply when establishing the total repair cost.



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Claim Review and Budget Tracking

How can I track my Ford Customer Loyalty Program Warranty Loaner Assistance budget usage?

You can access your dealership Warranty Loaner Assistance budget (PRENT) through the CLP Dashboard. Please see the [Warranty Loaner Assistance Budget \(PRENT\) – Claim Review and Budget Tracking](#) section of this guide for details.

How long is the dealership required to keep Ford Customer Loyalty Program documentation?

Dealers should retain Ford Customer Loyalty claims and supporting documentation in accordance with the guidelines published in the Ford Warranty & Policy Manual.

When claiming Ford Customer Loyalty rentals, does it need to be claimed on the same RO as the warranty repair or can we open a separate Repair Order?

All Ford Customer Loyalty rental claims should be submitted on the same RO as warranty repairs, using a separate line with the PRENT code and loaner amount. See the [Claims section](#) for more information.

What is the procedure to apply for loaner reimbursement on a Field Service Action (FSA)?

If a Field Service Action (FSA) provides rental coverage, the claim instructions and coding will be contained in the Dealer FSA notification and repair instruction letter.

How do I process a Ford Customer Loyalty Program shuttle claim?

Shuttle claims are to be processed at least monthly using program code PCLP and requires causal part "SHUTTLE" and miscellaneous expense code "SHUTTLE." Refer to the [Claims section](#) for more information.

What OWS sub code should be used when making a repair claim through the Ford Customer Loyalty Program?

All Dealer-approved repairs (≤ \$1,000) are to be submitted with sub code PCLP. CRC-approved repairs (more than \$1,000) are to be submitted with sub code P11.

What is the Ford Customer Loyalty Program claim submission period for PCLP (Dealer claim)?

All dealership Ford Customer Loyalty Program repairs (PCLP) must be submitted within 30 days of the Repair Order Line Close date, according to Ford Warranty & Policy Manual guidelines.

How should the Dealer process a ride-hailing (Uber, Lyft, taxi, etc.) claim?

Ford Customer Loyalty Program ride-hailing claims are submitted using sub code PCLP and require causal part "ALTTRANS" and miscellaneous expense code "RIDESHR."

How should claims be entered for fleets with negotiated rates?

If discounted rates have been provided to a Fleet customer, the dealership team should enter any pricing difference as Dealer participation in GCCT and OWS.

Example:

- \$900 = Price at Warranty Rates Claims (Parts and Labor)
- \$800 = Negotiated Rate (from Price) Quoted to customer

Entry in GCCT and OWS:

- \$500 = Ford Participation
- \$100 = Dealer Participation (Based on Negotiated Rate)
- \$300 = Customer Participation