

# Cleveland Brothers Product Support

## Customer Support Agreements

Cleveland  
Brothers



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- Maximize Uptime
- Minimize Risk
- Insulate Prices
- Increase Profitability

Let a CSA go to **WORK** for your company...

# CUSTOMER SUPPORT AGREEMENTS

A CSA is any agreement between a Dealer and a Customer that enables the Dealer to meet some or all of the Customer's Equipment Management needs.

At Cleveland Brothers, we recognize that your business is our business. That is why we have worked years to develop Customer Support Agreements that will help protect your investment and ensure your profitability.

From sophisticated plans that will guarantee pricing for up to 95% of a machine's maintenance needs, to plans that simply provide scheduled machine fluid & filter replacements at CAT recommended intervals, all CSA program terms and conditions are flexible and can be tailored to meet a customer's specific needs.



**TM&R (Total Maintenance and Repair)**

**PHTM&R (Powertrain and Hydraulic Total Maintenance and Repair)**

**PTM&R (Powertrain Total Maintenance and Repair)**

**PCRP (Powertrain Component Repair Program)**

**PCLP (Planned Component Life Program)**

**IOP/TLC (Inspection Only Program with Preventative Maintenance Services)**

**TLC (Preventative Maintenance Services)**

## **CSA Coordinator Inspections:**

Currently, the CSA group employs four full time CSA Coordinators, bringing over 120 years of combined expertise to your fleet! At an average of 3 times per 1000 hours of machine operation, their inspections help identify potential problem areas, and effectively reduce repair costs and machine down time. These inspections are not limited to just the particular CSA program scope but include all areas of the machine and its systems. Written reports are provided, giving the opportunity to correct small problems before they become major ones. All programs except the "TLC only" program include this valuable service.

## **Scheduled Oil Sampling:**

A vital part of the inspection process is the regular oil sampling of major Powertrain compartments and other systems. S.O.S. (scheduled oil sampling) and lab analysis is provided for all compartments at Caterpillar prescribed intervals. Routine fluid and oil analysis identifies abnormal wear particles alerting you to potential problems in your machine's vital systems, well in advance of significant problems. This testing helps you avoid costly failures and unplanned downtime. All tests are conducted with the latest technology and to Caterpillar's demanding specifications by Cleveland Brothers' own fluid analysis laboratory located in Harrisburg, PA.

## **Field Service Diagnostic Inspections:**

Expert Field Service technicians perform inspection, adjustment and diagnostic services at Caterpillar prescribed intervals. These Field Services keep the entire Powertrain in optimal operating condition throughout the entire agreement.

# Extended Warranties *verses* Customer Support Agreements (CSAs)

It pays to know the difference!

## FACTS

### Extended Warranties

- ✓ Covers defects in materials and workmanship only
- ✓ Wear out is not included
- ✓ Does not partner the customer to the dealer for repairs other than warranty
- ✓ Can result in arguments over coverage
- ✓ Eliminates dealer involvement once warranty period expires

### Customer Support Agreements

- ✓ Typically, coverage is provided for a term far greater than the EPTW period
- ✓ Provides equipment management services which include wear out
- ✓ Partners the customer to the dealer for all covered repair and maintenance services for the entire contract term
- ✓ Eliminates arguments over warranty coverage
- ✓ Levels out the peaks and valleys regarding a customer's expense for covered powertrain or machine repair events through cost-per-hour charges which are billed monthly based on average usage
- ✓ Guaranteed price whether a high level Total Maintenance agreement, or a lower level Inspection Only agreement.

## The Highest Level of Customer Support Available



### TOTAL MAINTENANCE AND REPAIR PROGRAM

The TM&R is a comprehensive Customer Support Agreement that provides a guaranteed price for all covered repairs and maintenance through a defined period of time. This CSA agreement is specifically designed for the total machine, as it will help maximize uptime, minimize maintenance expense and control risk which will keep the machine productive throughout its life cycle. TM&R's can run up to 25,000 hours for a large machine.

#### What is included:

- All covered major and minor repairs to the machine and its systems.
- Scheduled major Powertrain Component and Hydraulic overhauls or repairs.
- All covered in-chassis, or out of chassis repairs.
- Removal and installation, travel time and mileage, and contract hauling charges for all covered repairs.
- Lubrication and preventative maintenance services (TLC) in strict compliance with the Caterpillar Operation & Maintenance Manual.

#### Advantages:

- A TM&R agreement can help ensure that you achieve the longest possible equipment life at the lowest possible cost per hour of operation.
- Cleveland Brothers assumes the risk for unplanned repair events that occur during the contract term.
- Guaranteed price over a defined period of time allows for accurate cost analysis and financial planning of your entire fleet, eliminating the “peaks and valleys” which are typically associated with total machine repairs or overhaul events, whether scheduled or unscheduled.
- Assigned CSA Coordinator monitors and evaluates your entire machine throughout the agreement.
- Protection against any unexpected “poor core” event.
- Provides proactive and reactive product support for the majority of the machine and its complex systems.
  - Detailed CSA Coordinator inspection reports provided on a regular schedule (+/- 333 hours).
  - Expert Field Serviceman technical inspections provided on a regular schedule prescribed by Caterpillars Operation & Maintenance Manual.
  - Prescribed Scheduled Oil Sampling for all compartments and expert interpretation.

#### Cleveland Brothers provides:

- Guaranteed price to keep your machines in an acceptable, closely monitored operating condition through expert care and analysis, for a defined period of time.
- Proactive and reactive attention to machine, major powertrain component and hydraulic system repairs as required.
- Assigned CSA Coordinator and a team of Caterpillar experts through every operating hour.

## Comprehensive Powertrain and Hydraulic Coverage



### **POWERTRAIN and HYDRAULIC TOTAL MAINTENANCE AND REPAIR PROGRAM**

The PHTM&R is a comprehensive Customer Support Agreement that provides a guaranteed price for all Powertrain and Hydraulic covered repairs and maintenance through a defined period of time. Like a “full machine” agreement, it is specifically designed to maximize up-time, minimize expense and control risk which will help keep the machine productive throughout its life cycle. This agreement covers most all of the Powertrain and Hydraulic needs of your machine.

#### **What is included:**

- All covered major and minor repairs to the Powertrain and Hydraulic systems.
- Scheduled major Powertrain Component and Hydraulic overhauls or repairs.
- All covered in-chassis, or out of chassis repairs, specific to the Powertrain and Hydraulic systems.
- Removal and installation, travel time and mileage, and contract hauling charges associated with the Powertrain and Hydraulic systems.
- Lubrication and preventative maintenance services (TLC) in strict compliance with the Caterpillar Operation & Maintenance Manual.

#### **Advantages:**

- A PHTM&R Agreement can help ensure that you achieve the longest possible Powertrain and Hydraulic life at the lowest possible cost per hour of operation.
- Cleveland Brothers assumes the risk for unplanned repair events that occur during the contract term.
- Guaranteed price over a defined period of time allows for accurate cost analysis and financial planning of your entire fleet, eliminating the “peaks and valleys” which are typically associated with Powertrain and Hydraulic repairs or overhaul events, whether scheduled or unscheduled.
- Assigned CSA Coordinator monitors and evaluates your entire machine throughout the agreement.
- Protection against any unexpected “poor core” event.
- Provides proactive and reactive product support for the Powertrain and Hydraulic components and their complex systems.
  - Detailed CSA Coordinator inspections provided on a regular schedule (+/- 333 hours).
  - Expert Field Serviceman technical inspections provided on a regular schedule prescribed by Caterpillars Operation & Maintenance Manual.
  - Prescribed Scheduled Oil Sampling for all compartments and expert interpretation.

#### **Cleveland Brothers provides:**

- Guaranteed price to keep your machines covered Powertrain and Hydraulic systems in an acceptable, closely monitored operating condition through expert care and analysis for a defined period of time.
- Proactive and reactive attention to major powertrain component and hydraulic system repairs as required. *Note: Does not cover external hoses and lines: for oil, water and air (except hydrostatic lines between the drive pump and motor), and ether or starting system aids.*
- Assigned CSA Coordinator and a team of Caterpillar experts through every operating hour.



## Superior Powertrain Protection



### **POWERTRAIN TOTAL MAINTENANCE AND REPAIR PROGRAM**

The PTM&R is a comprehensive Customer Support Agreement that provides a guaranteed price for all Powertrain covered repairs and maintenance through a defined period of time. This agreement is specifically designed to maximize up-time, minimize maintenance expense and control risk which will help keep the machine productive through its life cycle. This agreement covers most all of the Powertrain needs of your machine.

#### **What is included:**

- All covered major and minor repairs to the Powertrain
- Scheduled major Powertrain Component overhauls or repairs.
- All covered in-chassis repairs or out of chassis repairs, specific to the Powertrain
- Removal and installation, travel time and mileage, and contract hauling charges associated with the Powertrain.
- Lubrication and preventative maintenance services (TLC) in strict compliance with the Caterpillar Operation & Maintenance Manual.

#### **Advantages:**

- A PTM&R Agreement can help ensure that you achieve the longest possible Powertrain life at the lowest possible cost per hour of operation.
- Cleveland Brothers assumes the risk for unplanned repair events that occur during the contract term.
- Guaranteed price over a defined period of time allows for accurate cost budgeting and financial planning of your entire fleet, eliminating the “peaks and valleys” which are typically associated with Powertrain repairs or overhaul events, whether scheduled or unscheduled.
- Assigned CSA Coordinator monitors and evaluates your entire machine throughout the agreement.
- Protection against any unexpected “poor core” event.
- Provides proactive and reactive product support for the Powertrain components.
  - Detailed CSA Coordinator inspections provided on a regular schedule (+/- 333 hours).
  - Expert Field Serviceman technical inspections provided on a regular schedule prescribed by Caterpillars Operation & Maintenance Manual.
  - Prescribed Scheduled Oil Sampling for all compartments and expert interpretation.

#### **Cleveland Brothers provides:**

- Guaranteed price to keep your machine or fleets covered Powertrain in an acceptable, closely monitored operating condition through expert care and analysis, for a defined period of time.
- Proactive and reactive attention to major powertrain component repairs as required. *Note: Does not cover external hoses and lines: for oil, water and air (except hydrostatic lines between the drive pump and motor), and ether or starting system aids.*
- Assigned CSA Coordinator and a team of Caterpillar experts through every operating hour.

## Major Component Coverage At A Predictable Rate



### **POWERTRAIN COMPONENT REPAIR PROGRAM**

The PCR program provides the customer with a guaranteed price for the major Powertrain components throughout the term of the contract. The cost per hour charge enables the customer to accurately budget their equipment expense associated with the major Powertrain components.

#### **What is included:**

- Overhaul or complete exchange (when available) of covered Powertrain components when necessary and useful life has been achieved
- Repair of covered Powertrain components when a \*major failure has occurred.

#### **Advantages:**

- Cleveland Brothers assumes the risk for major unscheduled Powertrain component repairs that occur during the contract term.
- Guaranteed price over a defined term allows for accurate cost analysis and financial planning of your fleet, eliminating the “peaks and valleys” which are typically associated with major Powertrain repairs or overhaul events.
- Protection against any unexpected “poor core” event.
- Provides proactive and reactive product support for the Powertrain components.
  - Detailed CSA Coordinator inspections provided on a regular schedule (+/- 333 hours).
  - Prescribed Scheduled Oil Sampling for all compartments and expert interpretation.

#### **Cleveland Brothers provide:**

- Field Serviceman technical inspection and adjustment (engine valve & unit injector adjustments) and diagnostic services at Caterpillar recommended intervals as prescribed by the Operation and Maintenance Manual.
- Expert recommendations as to the overall machine condition and maintenance needs.
- Attention to condition monitoring detail by a team of product support experts.
- Can include lubrication and preventative maintenance service in accordance with the Caterpillar Operation & Maintenance Manual.

*\*Major failure is defined as any repair event that requires a Powertrain component to come out of chassis for repair.*

## Partners In Risk Management



### **PLANNED COMPONENT LIFE PROGRAM**

The PCLP agreement offers proration of Powertrain component prices should a major failure occur or an overhaul be necessary before the anticipated component life. The customer charge for a Powertrain component is based on the service life received for that component, with the proration made against the planned life for each component at the **before failure** (good core) price in effect at the time of the component repair.

#### **What is included:**

- Proration of component prices should a major failure occur or an overhaul be necessary before the planned component life is achieved.

#### **Advantages:**

- Cleveland Brothers participates in the risk for all covered Powertrain component failures.
- Protection against any unexpected “poor core” event.
- Provides proactive and reactive product support for the Powertrain components.
  - Detailed CSA Coordinator inspections provided on a regular schedule (+/- 333 hours).
  - Prescribed Scheduled Oil Sampling for all compartments and expert interpretation.

#### **Cleveland Brothers provides:**

- Field Serviceman technical inspection and adjustment (engine valve & unit injector adjustments), and diagnostic services at Caterpillar recommended intervals as prescribed by the Operation and Maintenance Manual.
- Expert recommendations as to the overall machine condition and maintenance needs.
- Attention to condition monitoring detail by a team of product support experts.
- Can include lubrication and preventative maintenance service in accordance with the Caterpillar Operation & Maintenance Manual.
- “Pay for the life you received” logic, if an engine fails at half life, the proration is 50 percent of the current published Cleveland Brothers price. “Share in the risk” or choose a higher level of product support on your fleet and “guarantee” the maximum price you will pay (no matter what happens), over the long term.

*\*Major failure is defined as any repair event that requires a Powertrain component to come out of chassis for repair*



## Keeping A Cost-Saving Eye On Your Assets



### INSPECTION ONLY PROGRAM

The IOP Program provides the customer with regular inspections by a Customer Support Agreement (CSA) Coordinator and combines Field Service diagnostic inspections in the program. Identifying small problems early before they become large or turn into major component failures is what makes this program such a valuable addition to equipment management. These inspections are comprehensive in scope and include the entire machine and all of its systems. This high level inspection process is the core of the various CSA agreements (from TM&R to IOP) and is the foundation of the valuable support agreement solution for a Cleveland Brothers customer.

#### What is included:

- Check the engine and powertrain vital information (i.e. oil pressure, coolant temps, etc.)
- Check alarm system, (i.e. EMS, CMS, VIMS, VIDS, etc.)
- Check volumetric crankcase pressure
- Observe engine's performance
- Check water and fuel pumps for leaks
- Check radiator and coolers for leaks or plugging
- Check fan drive assembly
- Check fuel settings seal.
- Check air filter indicator's reading and operation
- Test Coolant for type, freeze point, and additives
- Visual inspection of drive train components.
- Check for hot track pins with infrared gun
- Inspect tires for damage and pressure
- Pull final drive magnetic plugs for inspections
- Visually inspect undercarriage
- Review maintenance records
- Review SOS trend
- Cut open and examine power train and engine filters for debris
- Recommend additional maintenance as required
- Download fault codes to a laptop computer for review and necessary action
- Check entire machine condition and report

#### Advantages:

- The CSA Coordinator is a valuable asset to your company's equipment management efforts.
- Identifying potential problems early effectively reduces repair costs and machine down time.
- Tracking and reporting on major Powertrain component hours for condition and scheduling purposes.
- Constant monitoring of oil samples submitted to Cleveland Brothers fluid analysis laboratory.

#### Cleveland Brothers provide:

- Field Serviceman technical inspection and adjustment (engine valve & unit injector adjustments), and diagnostic services at Caterpillar recommended intervals as prescribed by the Operation and Maintenance Manual.
- Expert recommendations as to the overall machine condition and maintenance needs.
- Attention to condition monitoring detail by a team of product support experts.
- Can include lubrication and preventative maintenance prescribed by Caterpillar.

## Proper Lube Maintenance Is The Key To Long Life



### **TLC (Tender Loving Care) PREVENTATIVE MAINTENANCE PROGRAM**

More than just an oil change, the expert TLC maintenance technicians provide a full range of preventative maintenance services at the customer's job site. Our service trucks are fully equipped with cleaning facilities, including an air compressor, pressure washer, and electric generator set to perform basic service and testing on your entire machine. On-board fluid particle counters can be utilized in the field to aid in system clean outs. Proper maintenance is performed at Caterpillar factory specified intervals by trained technicians. All pertinent materials such as oil, filters and lubricants are included in the service. In addition, the waste oil collected is removed from the customer's job site. Written reports are provided with each service performed, signed and dated by the technician.

#### **What is included:**

- Oils, filters and preventative maintenance services in accordance with the Cleveland Brothers maintenance program and Caterpillar prescribed guidelines.
- S•O•S, Scheduled Oil Sampling.
- Currently 540+ different machine models with standardized discounted (as compared to list) pricing.

#### **Advantages:**

- Guaranteed price throughout the term of the contract.
- Written reports are provided to support individual service completed, along with any possible areas of concern outside the scope of a PM Service that warrants attention from the customer.
- Only genuine Caterpillar parts are used to protect your investment.
- Expert trained technician comes to your jobsite at regular intervals.
- We handle the scheduling for you. Your machine or fleet is on our weekly schedule for services. Machine usage is tracked by our system and scheduled accordingly, at your convenience.

**See following schedule of maintenance items (on next page).**

# TLC Checklist

OPERATION	ITEM-SERVICE	SERVICE HOUR INTERVAL			
		250	500	1000	2000
<b>LUBRICATION</b>	1 Universal Joints - Lubricate When Accessible	●	●	●	●
	2 Blade/Loader Frame - Lubricate	●	●	●	●
<b>OIL AND FILTER ELEMENTS</b>	1 Change Engine Oil & Filters	●	●	●	●
	2 Fuel System - Change Filters		●	●	●
	3 Inspect/Replace Air Elements				
	Primary	●	●	●	●
	Secondary		●	●	●
	4 Clean or Replace Cab Filters	●	●	●	●
	5 Change Transmission Oil			●	●
	6 Replace Transmission Filters		●	●	●
	7 Change Final Drive Oil				●
	8 Change Hydraulic Oil				●
	9 Replace Hydraulic Filter Elements		●	●	●
	10 Change Differential Oil				●
	11 Change Steering Oil			●	●
	12 Change Steering Oil Filter		●	●	●
	13 Change Front Wheel Bearing Oil	●	●	●	●
14 All Filters Cut Open & Examined	●	●	●	●	
15 Take Oil Samples - All Compartments				●	
<b>INSPECTION</b>	1 Visual Inspection of Blade, Bucket, Bowl or Bed	●	●	●	●
	2 Visual Inspection of Ground Engaging Tools (broken, loose, worn)	●	●	●	●
	3 Visual Inspection of the Frame	●	●	●	●
	4 Visual Inspection of Undercarriage/Tires	●	●	●	●
	5 Visual Inspection of Electrical System (lights, wiring, breakers)	●	●	●	●
	6 Visual Inspection for Loose or Worn Equalizer Bar & Bogie Pads		●	●	●
	7 Check Battery Condition	●	●	●	●
	8 Check All Fluid Levels	●	●	●	●
	9 Check Oil & Fuel Pressure, Read Cab Gauges if Equipped	●	●	●	●
	10 Check Vehicle Monitoring System for Proper Operation	●	●	●	●
<b>COOLING SYSTEM</b>	1 Replace Coolant Element or Add Conditioner	●	●	●	●
	2 Check Coolant Maintenance Levels	●	●	●	●
	3 Check Coolant for Freeze Protection	●	●	●	●
<b>MISC.</b>	1 Clean Engine & Transmission Breathers		●	●	●
	2 Drain Sediment & Moisture from Fuel Tank (when possible)		●	●	●
	3 Clean Transmission Magnetic Strainer		●	●	●
	4 Clean Hydraulic Oil Screen		●	●	●
	5 Clean and Inspect Final Drive Magnetic Plugs	●	●	●	●
<b>OIL DISPOSAL</b>	1 Collect Waste Oil and Remove from Site	●	●	●	●

\* Actual services performed may vary, depending on machine model, Caterpillar Operation and Maintenance requirements and contract terms.

# Fluid Analysis Laboratory

Avoiding costly failures is key to minimizing operating expenses. Routine fluid and oil analysis identifies abnormal wear particles, alerting you to potential problems in your machine's vital systems.



In addition to identifying a problem, the scheduled oil sampling results can reveal its root cause.

Cleveland Brothers' Fluid Analysis Laboratory analyzes a variety of samples including engine oil, various powertrain oils, hydraulic fluid, and radiator coolant looking for “wear metal contamination” or “anything” that does not meet the correct physical and chemical make-up of that particular fluid. All tests are conducted with the latest technology and to Caterpillar's demanding specifications.

Our Fluid Analysis Lab was recently honored with CAT's “**Images of Excellence Award**”, certifying that Cleveland Brothers has met strict guidelines for accuracy in testing, fluid sample turn around time, and quality interpretation of test results.

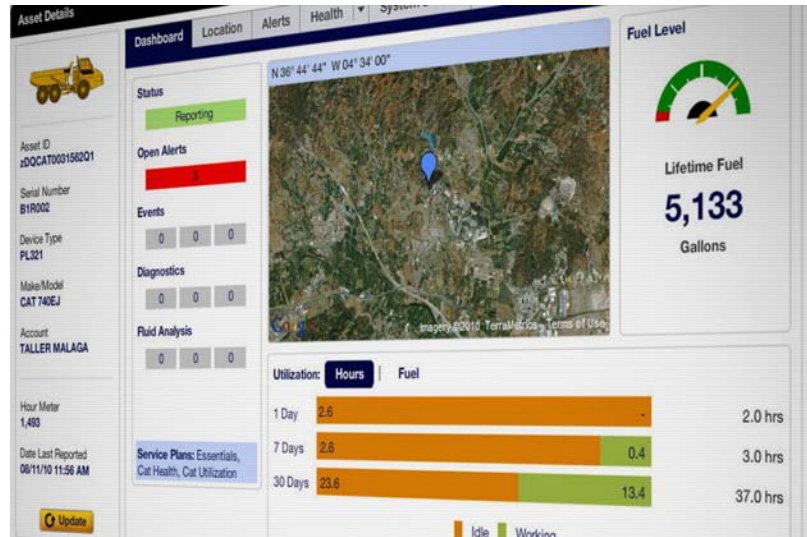
S.O.S Oil Sampling is an important feature of the Cleveland Brother's CSA offerings. The CSA Coordinator will take any samples necessary at the regularly scheduled machine inspection. Sample bottles are provided for required sampling at other times. Reports documenting the findings are available electronically, via fax and/or US postal service to as many contacts as the customer designates. The CSA Coordinator receives these reports and regularly reviews the results, and will readily take action should the results indicate that immediate attention is required. Cleveland Brothers also distributes S.O.S. results to our Product Support Sales Representatives who provide yet another point of contact to help our customers accurately address oil samples that require attention from an authority on Caterpillar equipment.





# Product Link / VisionLink

A key to effective fleet management is having critical information available as soon as possible. Using state-of-the-art **cellular and satellite** technology, Caterpillar **Product Link** provides two-way information flow between the machine on-board systems and your desktop computer or cellular phone. This data can be easily viewed through a browser via the Cleveland Brothers' Dealer Storefront **VisionLink** web interface. This combination of hardware and software technology provides valuable information about your fleet of equipment, allowing you to manage your entire operation more efficiently. VisionLink lets you subscribe to a different watch level of service for each machine depending on your needs.



## **VisionLink can help you:**

- Manage the location, security and basic usage of your assets.
- Schedule events like planned maintenance and major repairs.
- Address condition-based events such as diagnostic codes.
- Detect small problems before they may cause a major component failure.
- Increase machine availability.
- Identify operator training needs.

## **VisionLink Options\***

### **Universal**

- Machine Location
- Machine Location Mapping
- Machine Location History
- Non-reporting Machine ID
- Machine Hour Reading
- Machine Hour History
- PM Alerts
- PM Checklist
- PM Parts List
- Time and Geo-fencing
- Time and Geo-fence Alerts
- 4 Digital Switch Channels
- SOS Integration

### **Cat Essentials**

- Planned Maintenance (PM) History
- PM Notes
- Next PM Due (date & hour based)
- Customized PM Checklist
- PM and Repair Planner
- On-line Parts Ordering
- Manage Major Repairs
- Repair History
- PM or Repair Request for Quote
- Event and Diagnostic Codes
- Troubleshooting Procedures
- Event and Diagnostic Code Alerts
- Event and Diagnostic Code History
- Fuel Level
- Fuel Used
- Fuel Level Alert
- Fuel Used History & Graphic Display
- Fuel Level History
- Refueling History

\*Note: Universal and Cat Essentials information is dependent upon the machine model, year of production and Product Link model installed. Machines produced with electronic engines and transmissions equipped with Product Link model PL321SR normally can provide this information.