Siebel

Dealer Administration Guide

January 2020

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Contents

ORACLE

7 Managing Warranty Claims   73

ORACLE

Siebel
Dealer Administration Guide

ORACLE

Preface

This preface introduces information sources that can help you use the application and this guide.

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1 What's New in This Release

What's New in Siebel Dealer Administration Guide, Siebel CRM 20.1 Update

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

What's New in Siebel Dealer Administration Guide, Siebel CRM 19.1 Update

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

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2 Overview of Siebel Dealer

Overview of Siebel Dealer

This chapter covers the differences between Oracle's Siebel Dealer and Oracle's Siebel Partner Relationship Management. It includes the following topics:

- *About Siebel Dealer*
- *Differences Between Siebel Dealer and Siebel Partner Relationship Management*
- *Siebel Dealer Partner Portal Screens*
- *Siebel Partner Manager and Siebel Automotive Screens*
- *Activating Workflows for Siebel Dealer*
- *Changing Types of Activities Displayed in the Dealer Dashboard*
- *Adding New Dealers*
- *Roadmap for Adding a New Dealer*
- *Setting Up the Team Calendar*
- *About Sharing Data with Dealers*
- *Sales, Service, and Marketing with Siebel Dealer*
- *About Managing Your Dealers*
- *Added Functionality for Dealers*

About Siebel Dealer

Siebel Dealer allows vehicle manufacturers to work with dealers as easily as they work with employees of their own company. Siebel Dealer also helps dealers manage their own operations.

To set up Siebel Dealer, the manufacturer goes through the process of enrolling dealer companies. The manufacturer can add these companies' employees or can assign this task to a delegated administrator at each dealer company.

Then, the manufacturer can share opportunities, service requests, and other business information with dealer employees in the same way as you do with your own employees.

- The manufacturer's employees work with this information using Siebel Partner Manager, which lets them manage this information in the same way they do using Siebel Automotive.
- Dealer employees view and work with this information using Siebel Dealer.

The manufacturer can also use Siebel Partner Manager to:

- Send alerts, information about special promotions, and Web messages to dealers.
- Work collaboratively with dealers to develop plans to meet strategic goals.
- Analyze dealer effectiveness, forecast revenue, manage market development funds, and analyze performance.

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Dealers can also use Siebel Dealer to:

- Keep a log of customers who come into the showroom, and assign these customers to sales consultants.
- Manage information about sales opportunities and customers.
- Automatically send follow-up messages to customers after sales.
- Automatically notify sales consultants when they must contact customers to follow up after sales.
- Set up sales steps that sales consultants follow when they deal with potential customers.
- Analyze performance of sales consultants.
- Create yearly sales budgets and monthly sales forecasts.

Note: In addition to manufacturers, Siebel Partner Manager is useful to large dealer groups, who use it to share information with constituent dealerships.

Differences Between Siebel Dealer and Siebel Partner Relationship Management

This document covers only features of Siebel Dealer that are different from the features of Siebel Partner Relationship Management. It is meant to be used as a supplement to the documentation for Siebel Partner Relationship Management, which is in *Siebel Partner Relationship Management Administration Guide* .

The most important differences are:

- **Terminology.** *Siebel Partner Relationship Management Administration Guide* uses the terms *brand owner* and *partner*. In the automotive industry, brand owner refers to the *manufacturer* or the *OEM*, and partner refers to the *dealer*.
- **Cross-references.** *Siebel Partner Relationship Management Administration Guide* often refers the reader to *Siebel Applications Administration Guide* for more information. For Siebel Dealer, in addition to these books, see *Siebel Automotive Guide* .
- **Partner and Dealer Screens.** Siebel Partner Manager has several screens that let the brand owner manage information about partners. For Siebel Automotive, Siebel Partner Manager includes two versions of these screens, one designed specifically for managing information about dealers, and the other designed for managing information about other partners. For example:
  - Siebel Partner Manager has a Partner Operations screen that lets you view summary information about partner operations.
  - For Siebel Automotive, Siebel Partner Manager has a Dealer Operations screen that lets you view summary information about dealer operations, which is different from the Siebel Partner Relationship Management Partner Operations screen.
  - For Siebel Automotive, Siebel Partner Manager also has a Partner Operations screen that lets you view summary information about other partners' operations, which is similar to the Siebel Partner Relationship Management Partner Operations screen.
- **Added screens for dealer use.** In addition to the screens in Siebel Partner Portal, Siebel Dealer has added screens designed to allow dealers to manage their operations, which are available in Siebel Dealer but not in Siebel Partner Portal. These screens include:
  - Showroom Log

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- o Unassigned Opportunities

- o Employee Performance

- o Sales Step Administration

- o Yearly Forecast

- o Monthly Forecast

- o Campaign Administration

- **Added screens for the automotive industry.** In addition to the screens in Siebel Partner Relationship Management, Siebel Dealer has added screens with information specific to the automotive industry, which are available in both Siebel Partner Manager and in Siebel Dealer. Added screens include:

  - o Vehicles

  - o Vehicle Administration

  - o Product

  - o Sales History

  - o Service History

- **Modified screens.** Many screens that are in Siebel Partner Relationship Management are modified to have added views and fields with information specific to the automotive industry. These screens have the same information in Siebel Dealer as in Siebel Automotive (assuming the user has access to that data). These screens are also modified in Siebel Partner Manager so they have the same information as in Siebel Automotive. Modified screens include:

  - o Activities

  - o Contacts

  - o Opportunities

> **Note:** Apart from the added and modified screens listed here, other screens of Siebel Dealer are based on screens in Siebel Partner Relationship Management for Siebel Industry Applications. For more information about Siebel Partner Relationship Management for Siebel Industry Applications, see *Siebel Partner Relationship Management Administration Guide Addendum for Industry Applications* .

The differences in terminology and cross references described here apply to the entire *Siebel Partner Relationship Management Administration Guide* .

The rest of this document details the other differences described here, as they apply to specific chapters of *Siebel Partner Relationship Management Administration Guide* .

Siebel Dealer Partner Portal Screens

The overview chapter of *Siebel Partner Relationship Management Administration Guide* describes the screens of Siebel Partner Portal. In Siebel Dealer, a number of screens in Siebel Partner Portal and Siebel Partner Manager are different from Siebel Partner Relationship Management. In addition to the screens of the Siebel Partner Relationship

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Management partner portal, Siebel Dealer partner portal has the following screens that are used by the dealer company to manage its operations:

- **Showroom Log.** Allows dealers to enter information about potential customers who get in touch with dealers either through phone, by walking into the showroom, or any other medium.
- **Unassigned Opportunities.** Allows dealers to assign unassigned opportunities to sales consultants.
- **Employee Performance.** Allows dealers to evaluate employee performance on activities and opportunities.
- **Sales Step Administration.** Allows dealers to create sales steps which sales consultants follow when they deal with customers.
- **Yearly Forecast.** Allows dealers to plan their sales for the next year.
- **Monthly Forecast.** Allows dealers to plan their monthly sales.
- **Campaign Administration.** Allows dealers to create and view marketing campaigns.

In addition to the screens of Siebel Partner Relationship Management partner portal, Siebel Dealer partner portal has the following screens that are equivalent to screens in Siebel Automotive:

- **Vehicles.** Provides information about vehicles.
- **Vehicle Administration.** Allows users to administer information about vehicles.
- **Sales History.** Tracks the history of vehicle sales to each customer.
- **Service History.** Tracks the history of vehicle service to each customer.

The Products, Contacts, Opportunities, and Service screens are also different in Siebel Dealer than in Siebel Partner Relationship Management, because they have views and fields with information that is specific to the automotive industry.

The home page is also different in Siebel Dealer than in Siebel Partner Relationship Management. Siebel Dealer has two home pages:

- **Sales Manager Home Page**. Includes My Activities, My Team's Calendar, and Facility's Monthly Sales Goals.
- **Sales Consultant Home Page**. Includes My Calendar and My Goals.

Note: For these home pages to be visible, the position of the sales manager must have the value *Manager* in its Type field, and the position of the sales consultant must have the value *Sales Representative* in its Type field.

Siebel Partner Manager and Siebel Automotive Screens

When you work with Siebel Dealer, you can use Siebel Automotive for managing dealers. Siebel Automotive includes the screens that are specific to managing dealers, such as the Dealer Administration screen and the Dealers screen.

Siebel Automotive includes the following screens with information specific to the automotive industry, which are not available in Siebel Partner Relationship Management:

- **Dealers.** The Dealers screen lets you record general information about your dealers. It also helps you manage your relationship with your dealers. For example, it lets you work with the Dealer Profile, and it lets you enter and look up dealer management activities, contacts, and hours.
- **Dealer Operations.** The Dealer Operations screen lets dealer managers at the OEM view the transactional data for a given dealer, to give you an overall view of the dealer's operations. You can look up a dealer, and see its accounts, contacts, opportunities, orders, quotes, and service requests.

- **Dealer Administration.** The Dealer Administration screen lets you do much of the work that you must do to add a new dealer company, such as adding a record for the dealer, assigning user IDs and passwords to dealer users, and approving and registering dealer companies. In this screen you can complete the necessary steps to get a dealer company started, including creating a new organization and putting it in the proper place in the hierarchy. You can also administer dealer information, such as adding or changing information about users, or about the dealer organization.

- **Vehicles.** Provides information about vehicles.

- **Sales History.** Tracks the history of sales to each customer.

- **Service History.** Tracks the history of service to each customer.

The Dealer, Dealer Operations, and Dealer Administration screens are specific to working with dealers. In addition to these screens, the Partner, Partner Operations, and Partner Administration screens, used to work with other types of partners.

The overview chapter of *Siebel Partner Relationship Management Administration Guide* describes the screens of Siebel Partner Manager that are used for managing partners.

Activating Workflows for Siebel Dealer

Some features specific to Siebel Dealer are also based on workflows, and you must activate these workflows before dealers can use these features. You can also modify these workflows, in order to customize the way that these features work to suit your business model. For more information about activating and customizing workflows, see *Siebel Business Process Framework: Workflow Guide* .

The setup chapter of *Siebel Partner Relationship Management Administration Guide* describes some workflows you must activate to run certain features of Siebel Partner Relationship Management.

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To allow dealers to use the following features, you must activate the workflows listed for each one:

- For generating follow-up communications, activate the following workflows. eAuto Communication Rule - Follow-Up
  - eAuto Communication Rule - Lease Expiry
  - eAuto Communication Rule - No Activity
  - eAuto Communication Rule - Sales Anniversary
  - eAuto Communication Rule - Sub (Link Contact-Action)
  - eAuto Communication Rule - Sub (Link Employee-Action)

  For more information about how dealers use this feature, see *Generating Follow-Up Communications (Dealer)*.

- For list management for marketing campaigns, activate the following workflows.
  - SLM Create Activity From List
  - SLM Edit Call List Workflow
  - SLM List Operation - Generic
  - SLM Update Parent
  - eAuto List Operation - Intersection
  - eAuto List Operation - Subtraction
  - eAuto List Operation - Union

  For more information about how dealers use this feature, see *Managing Marketing Campaigns (Dealer)*

- For campaign administration for marketing campaigns, activate the following workflows.
  - eAuto Add Contact to List
  - eAuto Add List To Campaign
  - eAuto Add Opportunity to List
  - eAuto Add To Campaign (Contact)
  - eAuto Add To Campaign (Opportunity)
  - eAuto Add To Campaign
  - eAuto Add To List
  - eAuto Campaign Create Letter
  - eAuto Go to Service Request
  - eAuto Query - Go to Query Result
  - eAuto Query - New Search - Sales Rep

  For more information about how dealers use this feature, see *Managing Marketing Campaigns (Dealer)*

- For business rules, activate the following workflows.
  - eAuto Business Rule - Contact - Create Activity
  - eAuto Business Rule - Contact - Send Email
  - eAuto Business Rule - Contact - Send Letter

- eAuto Business Rule - Opportunity - Create Activity
- eAuto Business Rule - Opportunity - Send Email
- eAuto Business Rule - Opportunity - Update Expiration Status
- eAuto Business Rule - Sales History - Send Email
- eAuto Business Rule - Service History - Send Email
- eAuto Business Rule - Vehicle - Create Activity
- eAuto Business Rule - Vehicle - Send Email
- eAuto Business Rule Create Correspondence Request
- eAuto Business Rule Execution Workflow
- eAuto Business Rule Get eMail Template Name

For more information about how dealers use this feature, see *Managing Business Rules for Dealers*

Note: In addition to these, you must activate all workflows that will be used in action type definitions. When you select the workflow in the Action Type list, only workflows that have been activated will be shown, so you must activate them before creating the action types.

Changing Types of Activities Displayed in the Dealer Dashboard

The dealer dashboards display the employee's activities for the current day. There are more than 250 activity types, and dealers do not want to view most of them in the Activities applet of the dashboard. By default, the dashboard displays the following types of activities:

- Appointment
- Call - Outbound
- Email
- Fax
- Other
- Warranty Service
- Dealership Visit

For more information about the dealer dashboard, see *Using Siebel Dealer Dashboards (Dealer)*.

You can change which activities are displayed in the dashboard by using List of Values view of the Data Administration screen. An activity type is listed in the dashboard if it is included in List of Values view with EAUTO_ACT_SUM_TYPE in the Type field.

To change the types of activities displayed in the dashboard

1. Navigate to the List of Values view of the Data Administration screen.
2. Query to find all records that have EAUTO_ACT_SUM_TYPE.
3. To remove activity types from the dashboard, delete one or more of these records.

4. To add activity types to the dashboard:

    a. Add one or more records to the List of Values list.

    b. In the Type field, enter EAUTO_ACT_SUM_TYPE.

    c. In the Value and Language Independent Code fields, enter exactly the same values used in the Activity record.

Adding New Dealers

The chapter of *Siebel Partner Relationship Management Administration Guide* about adding partners describes the process of adding new partners. There are three major differences when you add new dealers:

- Siebel Dealer requires one organization for each dealer store if you want to prevent each store's data from being visible to the others.

- Siebel Dealer does not use Partner Self-Registration.

- Siebel Dealer requires Primary Partner type to be *Dealer*.

Each Store Must Have One Organization

When you create a new partner company and click Register, Siebel Partner Manager creates an organization that represents that partner company.

In Siebel Dealer, it is generally recommended that you or the partner company create an organization representing each of the dealer's stores. For example, if the dealer has 500 showrooms, it is recommended that you create 500 organizations, one representing each showroom.

By creating a separate organization for each store, you limit visibility so that each store can only see its own data and not the data from other stores. This allows dealers to use the added features that Siebel Dealer provides to manage their own retail operations, without dealers in other stores being able to see the data they enter.

It is generally best to use delegated administration to allow dealers to maintain their own employees and stores. After you have finished adding a new dealer company, when you contact the delegated administrator, you can tell the delegated administrator to create a suborganization for each store and to associate the employees of each store (including the store's delegated administrator) with the proper suborganization.

For more information, see the topic about delegated administration in the setup chapter of *Siebel Partner Relationship Management Administration Guide* .

Note: Vehicles must also be associated with the organizations representing stores. This is necessary for the Inventory Search to work properly.

If your business model requires you to protect the data in each store from being viewed by other stores, create a separate organization for each store. If your business model does not require this, you do not have to create a separate organization for each store.

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Partner Self-Registration Does Not Apply

In Siebel Partner Relationship Management, companies typically apply to become partners by registering at Siebel Partner Portal. When they register, they enter information that is stored in a Prospective Partner record. When the brand owner approves the registration, the Prospective Partner record is converted to a Partner record.

This model of partner registration does not apply to the automotive industry. Recruiting a dealer is a long process, which would not be done through applying at a Web site. For this reason, the topic about Registering Individual Partners in the setup chapter of *Siebel Partner Relationship Management Administration Guide* does not apply to Siebel Dealer.

For this reason, also, the process of adding new dealers in Siebel Dealer is different from the process of adding new partners in Siebel Partner Relationship Management. In the setup chapter of *Siebel Partner Relationship Management Administration Guide*, the enrollment process begins with the following two steps:

- **Display and assess prospective partners.** Begin by displaying the list of prospective partners recruited through the Web and deciding which to approve as partners.

- **Add a Partner record for the partner company.** You typically add a Partner record by approving a prospective partner.

These two steps do not apply to Siebel Dealer, and they can be replaced by the following:

- **Recruit new dealers.** Recruit dealers in the same ways that you have in the past, without using Siebel Dealer.

- **Add a Dealer record.** Add a record for the new dealer directly in the Dealer Administration screen, in the Approved Dealer view, or import the dealer record using EIM.

After the first two steps, the rest of the process of adding a new partner or dealer is similar to Siebel Partner Relationship Management, except that roles are not used, and the Dealer Administration screen is used instead of the Partner Administration screen.

For information about adding a new Dealer record directly, see the topic about other ways of adding partner records, at the end of the setup chapter of *Siebel Partner Relationship Management Administration Guide*. To add a dealer, use the Dealer Administration screen rather than the Partner Administration screen described in *Siebel Partner Relationship Management Administration Guide*. The word *Dealer* is also substituted for the word *Partner* in most field names described in *Siebel Partner Relationship Management Administration Guide*.

Roadmap for Adding a New Dealer

To add a new dealer, perform the following tasks:

1. Begin by adding a Dealer record directly in the Approved Dealer view, using the method described in the topic about other ways of adding partner records, at the end of the setup chapter of *Siebel Partner Relationship Management Administration Guide*. In the Partner Type field, be sure *Dealer* is selected.
2. Click Register to create the dealer organization. This is similar to the process described in the setup chapter of *Siebel Partner Relationship Management Administration Guide*, except that you can choose a parent organization for the new dealer, rather than just being able to choose a parent division.
3. After registering, you continue the process of assigning responsibilities, positions, and master data to the dealer company and of adding user assignments at the dealer company, as described in the setup chapter of *Siebel Partner Relationship Management Administration Guide*, except that you can skip the topic about roles, and you can use the Dealer Administration screen.

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Setting Up the Team Calendar

Managers at dealer companies can use the team calendar on the Dealer Dashboard to view the calendars of all the employees who report to them, which helps them to schedule meetings and other activities. For more information, see *Using Siebel Dealer Dashboards (Dealer)*.

Before dealer managers can use this calendar, you must set it up by using User Administration screen to enter the manager on the employees' contact teams. For example, if a manager named Sam Morris wants to use the team calendar to view the calendars of Scott Chan and Sarah Cole, you must find the records of Scott Chan and Sarah Cole in the User Administration screen, and add Sam Morris to the contact team of these employees.

To allow a manager to view the calendar of a team member

1. Navigate to the Administration - User screen.
2. In the Persons list, select the record for the employee whose calendar will be viewed.
3. In the Contact Team field, click the select button, and use the dialog box to add the manager to the contact team.

About Sharing Data with Dealers

The sharing data chapter of *Siebel Partner Relationship Management Administration Guide* discusses how to share transactional data and master data with your partners.

This chapter includes examples of typical ways that you might share transactional data such as opportunities, service requests, accounts, and contacts. In addition to the types of transactional data described here, Siebel Dealer supports the following types of transactional data:

- Vehicles
- Sales History
- Service History

The topics that follow provide examples of typical ways you might use these screens to share data with your dealers. There is also a topic about the Dealer Operations screen, which you can use to view all of a dealer's transactional data. You can also create business rules that dealers can use to automate some of their operations. For more information, see *Managing Business Rules for Dealers*.

Assigning Vehicles to a Dealer

Siebel Automotive lets you keep complete records on every vehicle you have sold to a dealer or a customer. Dealers can use the information about vehicles sold to customers to help them service customers' vehicles and to do future marketing to existing customers. For example, if a customer calls a dealer for service, the dealer can look up the vehicle record by VIN number or vehicle name to find details about the vehicle's sales and service history.

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When a vehicle is sold to a customer, associate the vehicle record with the contact record for that customer. You can make a vehicle visible to a dealer in two ways:

- **Assign a vehicle to a dealer employee.** If you add a dealer employee to the Access Team field for the vehicle, it will be visible to that employee in the My Vehicles view.

- **Assign a vehicle to a dealer company.** If you add a dealer company's organization to the Organization field for the vehicle, it will be visible to that company in the All Vehicles view. Someone at the dealer company with access to the All Vehicles view can add dealer employees to the Access Team view to make it visible to them in the My Vehicles view.

For more information about working with vehicles, see the topic about vehicles in the *Siebel Automotive Guide* .

To assign a vehicle to a dealer employee

1. Navigate to the Vehicles screen.
2. In the Vehicles list, select the vehicle that you want to assign to the dealer.
3. In the More Info form, click the more button.
4. In the More Info form, click the select icon for the Access Team field.

    The Access Team Members dialog box appears.
5. In the Access Team Members dialog box, click New.
6. In the list of employees, select the employee you want to add to the access team and click OK.

    The Access Team Members dialog box appears, with that employee added to the list.
7. In the Access Team Members dialog box, click OK.

    The vehicle will be visible to the employee you selected in the My Vehicles view.

To assign a vehicle to a dealer company

1. Navigate to the Vehicles screen.
2. In the Vehicles list, select the vehicle that you want to assign to the dealer.
3. In the More Info form, click the more button.
4. In the More Info form, click the select icon for the Organization field.

    The Organizations dialog box appears.
5. In the Organizations dialog box, click New.
6. In the list of organizations, select the organization that represents the dealer company you want to assign the vehicle and click OK.

    The Organizations dialog box appears, with that organization added to the list.
7. In the Organizations dialog box, click OK.

    The vehicle will be visible to the dealer company you selected in the All Vehicles view.

Configuring Vehicles and Options

You can use Siebel Configurator to create models of individual products, or entire product lines, that customers and dealers can use to configure products. When a customer visits a dealer who uses Siebel Dealer, the sales consultant can use the configuration in the sales process, suggesting additional options that interest the customer. The Siebel Configurator provides freedom of choice in configuring the vehicle and finding a valid solution.

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For example, a customer might tell the dealer that the customer wants aluminum wheels as an option. The configuration model that you set up can tell the dealer what aluminum wheels are available for that make of car. When the customer chooses one type of wheel, the configuration model can indicate whether special tires are needed for that type of wheel. It can also suggest that customers who buy that type of wheel might also want dual exhaust. For more information about using Configurator to define products, see *Siebel Product Administration Guide* .

Assigning Sales History to a Dealer

Siebel Automotive lets you enter or import a vehicle's sales history. Usually, dealers maintain their sales history in a Dealer Management System (DMS). After making a sale, the dealer reports it to the manufacturer, using an interface provided by the manufacturer. The OEM can then import it into Siebel Automotive using Siebel Enterprise Integration Manager (EIM). For more information about sales history, see *Siebel Automotive Guide* .

The sales history is automatically visible to the selling dealer. If the value in the Selling Dealer field is the organization of the employee who is logged in, then that employee will be able to view the sales history.

Siebel Dealer differs from Siebel Automotive, because in Siebel Dealer, sales history is only visible to the company in the Selling Dealer field. Siebel Automotive lets the OEM view the sales history for all organizations.

Assigning Service History to a Dealer

Siebel Automotive lets you enter or import a vehicle's service history. Usually, dealers report service history for vehicles that are under warranty, using the same manufacturer-provided interface that they use to report sales. The manufacturer can import this data into Siebel Automotive using EIM. For more information about service history, see *Siebel Automotive Guide* .

The service history is automatically visible to the servicing dealer. If the value in the Servicing Dealer field is the organization of the employee who is logged in, then that employee will be able to view the service history.

The Service History screen is hidden, and it is only visible to users when they drill down on the Service History field.

Viewing Dealer Operations

You can use the Dealer Operation screen to get an overall view of all of a dealer company's transactional data, including the company's opportunities, service requests, accounts, vehicles, and other transactional data. In some cases, you can also edit the transactional data.

The Dealer Operation screen only displays records that have the dealer company in their Organization field. The Dealer Operations screen of Siebel Dealer for Automotive includes the following views:

- **More Info.** Displays full information about the selected dealer company. Similar to the More Info view in Siebel Partner Relationship Management, except that it does not have an Industries field.

- **All Vehicles.** Lists all vehicles where the dealer organization is the primary organization for the vehicle.

- **Vehicle Inventory.** Lists all available vehicles owned by this dealer. A vehicle is listed here if, in the Vehicle view, the value of the Owned By field is Dealer, the value of the Account field is the dealer organization, and the value of the Status field is Available.

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- **Related Vehicles.** Lists all vehicles related to this dealer. A vehicle is listed here if, in the Account, then Vehicle view, the vehicle is listed in the Related Vehicle applet for the dealer, with any value for the relationship.

- **Employees.** Lists all employees of this dealer. Employees are listed here if their primary organization is this dealer's organization.

- **Contacts.** Lists all contacts of this dealer. Contacts are listed here if they have this dealer as one of the organizations in the Organization field of the Contact record.

- **Accounts.** Lists all accounts of this dealer. Accounts are listed here if they have this dealer as one of the organizations in the Organization field of the Account record.

- **Opportunities.** Lists all opportunities of this dealer. Opportunities are listed here if they have this dealer as one of the organizations in the Organization field of the Opportunity record.

- **Service Requests.** Lists all service requests of this dealer. Service Requests are listed here if the position of the service request owner belongs to the dealer organization.

- **Quotes.** Lists all quotes of this dealer. Quotes are listed here if they have this dealer as one of the organizations in the Organization field of the Quote record.

- **Order.** Lists all orders of this dealer. Orders are listed here if they have this dealer as one of the organizations in the Organization field of the Order record.

- **Activities.** Lists all activities of this dealer. Activities are listed here if the dealer organization is the primary organization of the activity's primary owner.

- **Makes.** Lists all makes sold by this dealer.

- **Hours.** Lists the hours of this dealer.

- **Sales History.** Lists all sales transactions where the selling dealer was this dealer.

- **Service History.** Lists all services transactions where the servicing dealer was this dealer.

To view dealer operations

1. Navigate to the Dealer Operation screen.
2. In the Dealers list, select the company whose transactional data you want to view.
3. Click the appropriate view tab to view the company's accounts, activities, vehicles, contacts, employees, hours, makes, opportunities, orders, quotes, related vehicles, sales history, service history, service requests, and vehicle inventory.

Sales, Service, and Marketing with Siebel Dealer

Several chapters of *Siebel Partner Relationship Management Administration Guide* describe possible scenarios that illustrate ways the brand owner and partner company might use Siebel Partner Relationship Management to manage sales, service, marketing, and partner commerce. The scenarios are meant to illustrate many possible uses of Siebel Partner Relationship Management.

Many of these scenarios do not apply to the automotive industry. Siebel Dealer is typically used by manufacturers in the following ways to manage sales, service, and marketing:

- **Sales.** Manufacturers share opportunities (leads), accounts, and contacts with Dealers. Dealers work on assigned opportunities and enter information about them. Manufacturers are able to view this information to see what progress the dealer is making on the opportunity.

- **Service.** Manufacturers assign service requests to dealers. Dealers resolve these service requests for the customer on behalf of the manufacturer and enter information about them. Manufacturers are able to view this information to track dealers' work on service requests.

- **Marketing.** Both the scenario for collaborative marketing with your partners and the scenario for marketing to your partners apply to the dealers in the automotive industry.

In addition, Siebel Dealer has a number of features that allow dealers to manage their own sales and their own marketing campaigns.

For information about how Siebel Dealer is used for sales, see *Managing Sales (Dealer)*.

For information about how Siebel Dealer is used for marketing campaigns, see *Managing Marketing Campaigns (Dealer)*.

About Managing Your Dealers

The managing partners chapter of *Siebel Partner Relationship Management Administration Guide* discusses many different ways of managing your partners.

The topic about tracking partner information describes ways that brand owners use the Partners screen to enter information about their partners.

In addition to the views on Siebel Partner Manager Partners screen, the Dealers screen in Siebel Partner Manager for Siebel Automotive has the following views with information that is specific to automotive dealers:

- Dealer Opportunities
- Dealer Vehicles
- Dealer Service Requests
- Dealer Makes
- Dealer Business Hours

Note: To work with the dealers, use the Dealer screen rather than the Partner screen. The word *Dealer* is substituted for the word *Partner* in this screen name and in most of the associated view names described in *Siebel Partner Relationship Management Administration Guide* .

Entering Opportunities to Sell to Dealers

When OEMs or dealer groups sell to dealers, they work with opportunities to sell to dealers, just as other companies work with opportunities from their customers. The Dealer Opportunities view is used by OEMs and dealer groups to sell to their dealers. For more information about working with opportunities, see *Siebel Applications Administration Guide* .

Note: Because dealer opportunities and service requests are used by OEMs selling to dealers, they can be enabled only if Siebel Automotive is being used as an OEM. They cannot be enabled if Siebel Automotive is being used by a dealer group.

To enter an opportunity to sell to a dealer

1. Navigate to the Dealers screen.

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2. In the Dealers list, select the dealer company for which you want to enter an opportunity.
3. Click the Opportunities view tab.

   The Dealer Opportunities view appears with a list of all opportunities to sell to this dealer.
4. In the Opportunities list, click New to add a new Opportunity record, and enter the appropriate information in its fields.

Viewing a Dealer's Service Requests

Because OEMs sell to dealers, they get service requests from dealers for products that they have sold to them, just as other companies get service requests from their customers. The Dealer Service Requests view is used by OEMs and dealer groups to track service requests from their dealers.

Dealers can telephone your call center with service requests, and your call center agents would enter the service requests in Siebel Automotive. Dealers can also enter service requests directly in the Siebel Dealer Self-Service screen, and they will appear in your service agents' queues, along with service requests that were phoned in.

These service requests also appear in the Service screen, where your service agents access them, along with other service requests in their queue. The Dealer Service Requests view is a convenient way of viewing all the service requests from a dealer in one place; it is not the main screen service agents use to respond to service requests.

The Dealer Service Requests view displays all service requests from a dealer regardless of whether their status is open or closed. For more information about working with service requests, see *Siebel Applications Administration Guide* .

To display all service requests from a dealer company

1. Navigate to the Dealers screen.
2. In the Dealers list, select the dealer company whose service requests you want to view.
3. Click the Service Requests view tab.

   The Service Requests list includes all service requests from this dealer.

Entering the Makes a Dealer Sells

Siebel Automotive lets you enter the makes of car that each of your dealers sells, so you can look them up easily. Use Dealer Makes view to enter and look up the makes of car that dealers sell.

To enter the makes a dealer sells

1. Navigate to the Dealers screen.
2. In the Dealers list, select the dealer company whose makes you want to enter.
3. Click the Sales and Service view tab.
4. In the Sales and Service list, from the Show drop-down list, choose Makes, if it is not already selected.
5. In the Makes list, click New, and fill in the appropriate data in the new record.

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Displaying a Dealer's Business Hours

Siebel Automotive lets you enter the hours when each of your dealers is open to provide sales and services, so you can look up dealers' business hours easily. Use Dealer Sales and Service Hours view to enter and look up your dealers' business hours.

To enter a dealer's business hours

1. Navigate to the Dealers screen.
2. In the Dealers list, select the dealer company whose hours you want to enter.
3. Click the Sales and Service view tab.
4. In the Sales and Service list, from the Show drop-down list, choose Hours.

   The Dealer Sales & Service Hours view appears.
5. In the Sales Hours list, click New to add a new record for each day of the week.

   In each record, choose the name of the day and the start time and end time of the dealer's sales hours for that day.
6. In the Service Hours list, click New to add a new record for each day of the week.

   In each record, choose the name of the day and the start time and end time of the dealer's service hours for that day.

Added Functionality for Dealers

Because dealers are the main point of contact with automotive customers, they need more capabilities than other partners. Siebel Dealer gives them added functionality to use in:

- **Sales.** For more information, see *Managing Sales (Dealer)*.
- **Marketing.** For more information, see *Managing Marketing Campaigns (Dealer)*.
- **Captive Finance.** For more information, see *Managing Captive Finance and End of Lease (Dealer)*.

In addition to the enhancements covered in these chapters, Siebel Dealer provides added fields in a number of screens and views to allow dealers to record additional information used in sales and service. Added fields are available in the following records:

- **Opportunities.** The opportunity record includes added fields that allow the dealer to enter information about the customer's target purchase horizon and monthly budget to pay for the car, the quality of the opportunity, the lead partner on the opportunity, and the status of the opportunity.
- **Contacts.** The contact record includes added fields that allow the dealer to enter information about the customer's preferred name, preferred call time, ideal call time, and customer ID, and a field to indicate that the customer is deceased.
- **Contact Profile.** The Profile view of the Contact screen includes added fields that allow the dealer to record the contact's mileage driven for each year, frequency of replacing cars, discount eligibility, whether the discount was used in the past, amount spent on service and parts, preferred method of follow-up, preferred method of service reminder, and request not to contact.

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- **Sales History.** The Sales History view of the Contact screen includes added fields that allow the dealer to view the sales team for the vehicle, the type of sale, the opportunity related to this sale, the down payment, the trade allowance, the monthly payment, the stock number, the remaining payments, the security deposit, the contract end date, and other information.

- **Service History.** The Service history view of the Contact screen includes added fields that allow the dealer to view the account (for a vehicle that is owned by a fleet account), make, model, mileage, repair order number, service consultant, technician, cost for parts and labor, and total cost.

- **Activities.** The Activity record has an added Category field, allowing dealers to categorize activities as sales activities, customer retention activities, and service activities.

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3 Managing Sales (Dealer)

Managing Sales (Dealer)

This chapter covers special features of Siebel Dealer that are available only to dealers to help dealers manage sales. It includes the following topics:

- *About Siebel Dealer Dashboard*
- *Using Siebel Dealer Dashboards (Dealer)*
- *Entering Dealer Preferences (Dealer)*
- *Process of Creating the Yearly Forecast (Dealer)*
- *Process of Creating the Monthly Forecast (Dealer)*
- *Process of Creating and Using Sales Steps (Dealer)*
- *Process of Using the Showroom Log (Dealer)*
- *Entering Opportunities (Dealer)*
- *Assigning Unassigned Opportunities (Dealer)*
- *Entering Vehicles Presented (Dealer)*
- *Displaying Others Who Have Accessed a Contact (Dealer)*
- *Reassigning Contacts and Opportunities (Dealer)*
- *Process of Printing Forms for Vehicle Sales (Dealer)*
- *Generating Follow-Up Communications (Dealer)*
- *Marking Opportunities as Closed (Dealer)*

About Siebel Dealer Dashboard

Siebel Dealer allows the OEM to collaborate with dealers on sales. For more information, see *Sales, Service, and Marketing with Siebel Dealer*.

Siebel Dealer provides dealer employees with dashboards that allow them to view the most important information that they need for their work on one screen.

The following dashboards are available:

- **Sales Consultant Dashboard.** Includes actual and goal unit sales, today's activities, my calendar, current opportunities, and my promotions.
- **Sales Manager Dashboard.** Includes actual and goal unit sales for team, today's activities, my calendar, current opportunities, team's promotions, and team's calendar.
- **Service Employee Dashboard.** Includes today's activities, my calendar, my promotions, and current service requests.
- **Service Manager Dashboard.** Includes today's activities, my calendar, store promotions, and current service requests for team.

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- **Store Dashboard.** Includes actual and goal unit sales for store, today's activities, my calendar, current opportunities, team's promotions, and team's calendar. To be used by the store general manager.

Some of the applets on the dashboards display daily data, and some display monthly data. In addition, the calendar can display data for the day, week, or month.

- **Daily data.** The following applets display data for the current day:
  - Today's Activities. Displays all of the employee's activities for the current day. The first column lists activities that have a due date of today and are not done. The second column lists activities that have a due date of before today and are not done; it continues to display past-due activities for the number of days defined in Dealer Preference view, as described in *Entering Dealer Preferences (Dealer)*.

    Note: The Today's Activities only displays certain types of activities, as described in *Changing Types of Activities Displayed in the Dealer Dashboard*.

  - Current Opportunities. Displays all current opportunities for this consultant where there is no activity or there has been activity in the last 15 days. This is based on the value in the Last Activity Date in the Opportunity view of the Contacts screen. Whenever you make any change to an opportunity, this field is updated.
  - My Promotions, Team's Promotions, or Store Promotions. Displays all promotions that are active on the current day. Promotions are displayed if their campaign is not completed, and the creation date is within 30 days of today's date, and today is between the start date and end date of the campaign.
  - Team's Calendar (Today). Available to sales managers and store manager only. Gives the managers a view of the calendars of all their reports for the current day. The manager can also click the arrows to view their reports' calendars for previous or later days.
- **Monthly data.** The following applet displays data for the current month:
  - Unit Sales. Displays the actual sales and sales goals for the current month for fleet, new retail and used retail sales. On the sales consultant dashboard, it displays the actual sales and sales goals for that individual sales consultant. On the sales manager dashboard, it displays the actual sales and sales goals for the manager's team. All these sales goals are based on the monthly forecast, described in *Process of Creating the Monthly Forecast (Dealer)*. Actual data is based on the Service History view.
- **Calendar**. Provides a complete calendar for creating and tracking appointments and other activities. Employees can display and use a daily, weekly, or monthly calendar.

Using Siebel Dealer Dashboards (Dealer)

This topic describes how to use Siebel Dealer dashboards.

To use Dealer dashboards

1. Navigate to the Dashboard screen.
2. From the Show drop-down list, select:
   - Sales Consultant Dashboard
   - Sales Manager Dashboard
   - Service Employee Dashboard
   - Service Manager Dashboard

o Store Dashboard

> **Note:** Employees can only select the view that is appropriate to them. For example, a sales consultant does not have the sales manager view available.

The dashboards display the most important information needed by these employees, in summary form.

3. Sales managers can refresh the data in the dashboard by clicking Refresh. Sales consultants' data is refreshed periodically, based on the refresh interval set in Dealer Preference view, as described in *Entering Dealer Preferences (Dealer)*.

The Update field in the Unit Sales and Activities applets shows the last time that the data was refreshed.

4. To view more complete information, click the heading that appears before any of the applets in the dashboard.

The appropriate screen appears, with more complete information.

Entering Dealer Preferences (Dealer)

Dealers can specify preferences to control features of Siebel Dealer behavior, such as how long a trade in evaluation remains valid and how frequently the dashboard refreshes.

To enter dealer business preferences

1. Navigate to the Dealer Preference screen.
2. In the Dealer Preference form, select values for the fields, as described in the following table.

Field	Comments
Trade In Evaluations Valid For	Enter the number of days that a trade-in evaluation remains valid. The default is 30 days. The value you enter here controls the value in the # of Valid Evaluations field of the Opportunity record. For example, if a sales consultant does a trade-in evaluation today and evaluations are valid for 30 days, # of valid evaluations will include this evaluation for the next 30 days.
Dashboard Activity History	Enter the number of days that activities remain in the dashboard history. Activities in the dashboard disappear a specified number of days after their due date, depending on the value you enter here.
Dashboard Activity Refresh Interval	Enter a number of hours to specify how frequently dashboard activities will refresh. To refresh more frequently than once an hour, enter a decimal, such as .5. This prevents overloading because of constant refreshes.
Dashboard Unit Sales Refresh Interval	Enter a number of hours to specify how frequently dashboard unit sales will refresh. To refresh more frequently than once an hour, enter a decimal, such as .5.
Period Type	Specify the period used in forecasts. For more information, see *Creating the Framework for Yearly and Monthly Forecasts (Dealer)*.
Split Deals for Sales Consultants	Select this check box to specify whether the deal is split.

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Field	Comments
	If a deal is not split, all the employees in the Sales History view will be fully credited for the deal. For example, if employee A and B both work on the sale of a given product, then both would be considered full contributors for the sale of that product. If a deal is split, the employees in the sales history will be credited according to a preset weight. For example, if the weight specifies that the sales can be split among all the contributors equally, both A and B would be considered a part-time contributor and would have one-half of the sale credited to their records. The weight does not show up in the Siebel Dealer user interface. It is designed to be included in the data imported from the third-party application. **Note:** If no weight value is available but the split flag is checked, the default weight is 0, and none of the employees is credited.
Remove assigned Sales Consultant when assigning new Sales Consultant to Opportunity and Contacts	Select this check box if you want the current sales consultant to be removed from an opportunity and contact when they are assigned to a new sales consultant.

Process of Creating the Yearly Forecast (Dealer)

At the end of the year, the dealership's general manager usually consults with sales managers to create the store yearly forecast for the next year.

Siebel Dealer automates this consultation process. The sales managers enter their yearly forecasts in Siebel Dealer, and the general manager uses these to create the store yearly forecast.

To create the yearly forecast, the dealer goes through the following steps:

1. *Creating the Framework for Monthly and Yearly Forecasts (Dealer)*
2. *Creating the Sales Manager's Yearly Forecast (Dealer)*
3. *Creating the Store Yearly Forecast (Dealer)*
4. *Displaying the Store Yearly Forecast (Dealer)*

Creating the Framework for Monthly and Yearly Forecasts (Dealer)

Before doing forecasts, the general manager of the dealership creates the framework for the forecasts by specifying:

- **Periods.** By default, sales consultants and managers enter their estimated sales for each month, but you can also choose a different period.
- **Employees.** You must specify which employees will be included in the store yearly forecast and the store monthly forecasts for the next year. This option only applies at the store level; all sales consultants will be included in the sales manager's monthly forecasts and will have sales goals generated, even if they are not included in the store forecast.

This task is a step in *Process of Creating the Yearly Forecast (Dealer)*.

The general manager can create the frameworks for the yearly and monthly forecast at different times, but it is most common to create both at the same time, at the end of the year when the general manager is planning for the next year. This most common practice is described here.

> **Note:** When new employees are added during the year, the general manager must add them, using the following procedure if the general manager wants to include them in the yearly and monthly forecasts.

To select the period for yearly and monthly forecasts

1. Navigate to the Dealer Preference screen.
2. In the Period field, select the period you want to use.

You might want to specify which employees are included in the store yearly and store monthly forecasts.

To specify which employees are included in the store yearly and store monthly forecasts

1. Navigate to the Dealer Preference screen.
2. In the link bar, click Employee Yearly and Monthly Forecast Admin.

   The Employee Yearly and Monthly Forecast Admin list appears. It includes all the employees in the store.
3. In the Employee Yearly and Monthly Forecast Admin list:

   ○ Select the Part of Store Yearly Forecast field to include an employee in the yearly forecast.

   ○ Select the Part of Store Monthly Forecast field to include an employee in the monthly forecast.
4. Repeat Step 3 for all the employees who will be included in the yearly forecast and monthly forecasts.

Creating the Sales Manager's Yearly Forecast (Dealer)

After the general manager has created the framework for the yearly forecasting process, the general sales manager tells the sales managers to add their estimated figures for the next year's sales forecast.

The sales managers or the employees that they choose to enter the forecast go to the Manager's Yearly Forecast view of the Yearly Forecast screen, and they enter the figures for each period.

This task is a step in *Process of Creating the Yearly Forecast (Dealer)*.

To create the sales manager's yearly forecast

1. Navigate to the Yearly Forecast screen.
2. From the Show drop-down list, select Manager's Yearly Forecast.
3. Click Create All Periods for Year.

   In the Yearly Forecast list, all the periods for the year appear.
4. In a record in the Yearly Forecast list, in the Retail New, Retail Used, and Fleet fields of that record, enter an estimate of the sales of the sales manager's reports for that period.

   Retail New is forecasted retail sales of new vehicles. Retail used is forecasted retail sales of used vehicles. Fleet is forecasted sales of vehicles to fleets.

5. Repeat Step 4 to add an estimate of sales for every period in the yearly forecast.

Creating the Store Yearly Forecast (Dealer)

After all the sales managers have entered their forecasts for the year, the dealership's general manager can create the store yearly forecast on the basis of the sales manager's forecasts.

The general manager can use the Store Yearly Forecast view of the Yearly Forecast screen to look at the total yearly forecast for the store for each period, which is the sum of all the sales managers' yearly forecasts. The general manager can also use this screen to look at each sales managers' yearly forecast for each period. Employees records will appear only if they have been included as part of the store yearly forecast.

The general manager might want to adjust the yearly forecast for each period. For example, the sales managers might have been too optimistic, and given economic conditions, the general manager might think it is more realistic to set a lower store yearly forecast than the store yearly forecast based on the sales managers' yearly forecasts.

If the sales managers have not all entered their forecasts, the general manager can add records and enter forecasts for those sales managers.

This task is a step in *Process of Creating the Yearly Forecast (Dealer)*.

To add sales managers' forecasts to the store forecast

1. Navigate to the Yearly Forecast screen.
2. From the Show drop-down list, select Store's Yearly Forecast.
3. In the Yearly Forecast list, select the record for the coming period, and scroll down to view the Sales Manager's Monthly Forecast list.
4. If all the sales managers' forecasts are not listed there, you can add records for individual sales managers or for all sales managers.

    a. In the Sales Managers Yearly Forecast list, from the menu, select Add Employee and use the dialog box to add individual sales managers.

    b. In the Sales Managers Yearly Forecast list, from the menu, select Add All Employees to add all sales managers who are not already on the list.

    Records for sales managers are created with zero values.
5. For any sales managers that have been added to the list, enter values in the Yearly Forecast Retail New, Yearly Forecast Retail Used, and Yearly Forecast Fleet fields.

    You might want to create a store yearly forecast.

To create the store yearly forecast

1. Navigate to the Yearly Forecast screen.
2. From the Show drop-down list, select Store's Yearly Forecast.

    In the Yearly Forecast list, there are records for all the periods in the yearly forecast, with new, used, and fleet sales figures that are the sum of all the sales managers' yearly forecasts for that period.
3. Select a record in the Yearly Forecast list and scroll down to view the Sales Manager's Yearly Forecast list, which includes all the sales managers' yearly forecasts for that period.
4. If the general manager thinks the sales managers' estimates are not accurate, the general manager adjusts the forecast for the store by editing the New, Used, and Fleet fields for that period.

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5. Click Roll-Up.

   The yearly forecast appears.

6. To create a store forecast for every period in the yearly forecast, repeat Steps 3, 4, and 5.

Viewing the Store Yearly Forecast (Dealer)

After the process of creating the store yearly forecast is complete, dealers can view it by going to the yearly forecast screen. The sales manager can view the manager yearly forecast, and the general manager can view the store yearly forecast.

This task is a step in *Process of Creating the Yearly Forecast (Dealer)*.

To display the store yearly forecast

1. Navigate to the Yearly Forecast screen.
2. From the Show drop-down list, select Manager's Yearly Forecast or select Store's Yearly Forecast.

Process of Creating the Monthly Forecast (Dealer)

At the end of the each month, the dealership's general manager usually consults with sales managers and sales managers consult with sales consultants to create the sales forecast for the next month. These forecasts are the sales goals for the store and the sales goal for each consultant for the month.

Siebel Dealer automates this consultation process. The sales consultants enter their forecasts in Siebel Dealer, and the sales managers use these to create their forecasts. Then the general manager uses the sales managers' forecasts to create the store forecast.

The process of creating monthly forecasts is similar to the process of creating yearly forecasts, except that:

- Monthly forecasts are done once a month, and yearly forecasts are done once a year.

- Monthly forecasts begin with sales consultant forecasts, which are used as the basis of the sales managers' forecasts and the store forecasts. Yearly Forecasts begin with sales managers' forecasts, which are used as the basis of the store forecast.

To create the monthly forecast, the dealer goes through the following steps:

1. *Creating the Framework for Yearly and Monthly Forecasts (Dealer)*
2. *Creating Sales Consultants' Monthly Forecasts (Dealer)*
3. *Creating Sales Managers' Monthly Forecasts (Dealer)*
4. *Creating the Store Monthly Forecast (Dealer)*
5. *Displaying the Monthly Forecast (Dealer)*

Creating the Framework for Yearly and Monthly Forecasts (Dealer)

Before monthly forecasts can be created, the general manager of the dealership specifies what period will be used and which employees will be included in the store yearly forecast and the store monthly forecasts for the next year.

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This is usually done at the beginning of each year for both yearly forecasts and monthly forecasts. It is described in detail in the discussion of creating yearly forecasts in *Creating the Framework for Monthly and Yearly Forecasts (Dealer)*.

This task is a step in *Process of Creating the Monthly Forecast (Dealer)*.

Creating Sales Consultants' Monthly Forecasts (Dealer)

At the end of each period, when it is time for forecasting for the next period to begin, the first step is for the sales consultants to create their forecasts. They enter their goal for projected sales for the coming month.

This task is a step in *Process of Creating the Monthly Forecast (Dealer)*.

To create a sales consultant's forecast

1. Navigate to the Monthly Forecast screen.
2. From the Show drop-down list, select My Monthly Forecast.
3. Click Create One New Period.

   In the Monthly Forecast list, a record is added for the next period.
4. In the Retail New, Retail Used, and Fleet fields of the new record, enter an estimate of sales for that period.

Creating Sales Managers' Monthly Forecasts (Dealer)

After the sales consultants who report to a sales managers have entered their forecasts, the sales manager can create a forecast on the basis of the sales consultant's forecasts.

Sales managers look at their reports' forecasts. The default forecast for the sales manager is the sum of all the reports' forecasts. The sales manager can adjust this forecast to set a more realistic forecast for the month.

If any sales consultant has not entered a monthly forecast, the sales manager can add a record and enter forecast figures for that employee.

This task is a step in *Process of Creating the Monthly Forecast (Dealer)*.

To add sales consultants' forecasts

1. Navigate to the Monthly Forecast screen.
2. From the Show drop-down list, select Manager's Monthly Forecast.
3. In the Monthly Forecast list, select the record for the coming period, and scroll down to view the Sales Consultant's Monthly Forecast list, which includes the forecasts for that month of all the sales consultants who report to this sales manager.

   If a sales consultant has not created a forecast, there will be no record for that sales consultant.
4. If all the sales manager's reports are not listed there, click Add All Employees Who Report To Me.

   If any employee has not created a record, a record for that employee is created with zero values.
5. For any sales consultants who have been added to the list, enter values in the Monthly Forecast Retail New, Monthly Forecast Retail Used, and Monthly Forecast Fleet fields.

You might want to create a sales manager's forecast.

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To create a sales manager's forecast

1. Navigate to the Monthly Forecast screen.
2. From the Show drop-down list, select Manager's Monthly Forecast.
3. In the Monthly Forecast list, select the record for the coming period, and scroll down to view the Sales Consultant's Monthly Forecast list, which includes the forecasts for that month of all the sales consultants who report to this sales manager.
4. If the sales manager thinks the sales consultants' estimates are not accurate, the sales manager adjusts the monthly forecast for that period:

    a. In the Monthly Forecast list, the record for that period will already be selected.
    b. Change the values in the Monthly Forecast Retail New, Monthly Forecast Retail Used, and Monthly Forecast Fleet fields.
5. Click Roll-Up

    The monthly forecast appears.

Creating the Store Monthly Forecast (Dealer)

After all the sales managers have entered their forecasts, the dealership's general manager can create the store forecast on the basis of the sales manager's forecasts.

The Forecast screen, Store Forecast view allows the general manager to look at the total forecast for the store for each month, which is the sum of all the sales managers' forecasts. Sales managers forecasts will be shown here only if they have been marked as part of store monthly forecast in Employee Yearly and Monthly Forecast Admin view. The sales manager can adjust this forecast to set a more realistic forecast for the month.

> **Note:** If not all sales managers have entered their forecast, the general manager can add records and enter forecasts for them by clicking Add All Employees Who Report to Me, as described in *Creating Sales Managers' Monthly Forecasts (Dealer)*.

This task is a step in *Process of Creating the Monthly Forecast (Dealer)*.

To create the store forecast

1. Navigate to the Monthly Forecast screen.
2. From the Show drop-down list, select Store's Monthly Forecast.
3. In the Store's Monthly Forecast list, select the record for the coming month and scroll down to view the Sales Managers Forecast list.
4. If the general manager thinks the sales managers' estimates are not accurate, the general manager adjusts the monthly forecast for the store:

    a. In the Monthly Forecast list, the record for that period will already be selected.
    b. Change the values in the Monthly Forecast Retail New, Monthly Forecast Retail Used, and Monthly Forecast Fleet fields.
5. Click Roll-Up.

    The monthly forecast appears.

Viewing the Monthly Forecast (Dealer)

Sales consultants and sales managers can view their own forecasts on the Siebel Dealer Dashboard. The dashboard automatically displays the forecast information for the current month of the current year. For more information about using the dashboard, see *Using Siebel Dealer Dashboards (Dealer)*.

This task is a step in *Process of Creating the Monthly Forecast (Dealer)*.

Process of Creating and Using Sales Steps (Dealer)

To guide the sales process, each dealership can create a list of standard sales steps that sales consultants perform to work on each opportunity. The dealership can calculate sales step goals, based on the monthly forecast. The sales consultants view these sales steps by navigating to the Contacts screen, Opportunities, and then the Sales Steps view. When the sales consultants finish each step, they click Done, which automatically fills in the current date and creates an Activity record of the type Sales Step, to let managers track which sales step each employee has completed.

Sales consultants can see which sales steps have already been completed for an opportunity.

Dealers have the option of creating and using sales steps, but it is not mandatory.

> **Note:** Before you calculate sales step goals, you must create the monthly forecast, as described in *Process of Creating the Monthly Forecast (Dealer)*.

To create and use sales steps, dealers perform the following steps:

1. *Creating Sales Steps (Dealer)*
2. *Creating Sales Step Goals (Dealer)*
3. *Displaying Daily Sales Step Goals (Dealer)*
4. *Using Sales Steps (Dealer)*
5. *Tracking Sales Steps (Dealer)*

> **Note:** This process shows one way of using sales steps. Your use of it might be different, depending on your business model.

Creating Sales Steps (Dealer)

Each dealership defines its own sales steps, to be used by its sales consultants. The general manager can plan the sales strategy and design the needed sales steps. Then the sales steps are entered in Siebel Dealer's Sales Step Administration screen.

This task is a step in *Process of Creating and Using Sales Steps (Dealer)*.

To create sales steps

1. Navigate to the Dealer Preference screen.
2. In the link bar, click Sales Step Administration.

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3. Add a new record to the Sales Step Administration list and complete the necessary fields, as described in the following table.

Field	Comments
Name	Enter a name for the sales step, which will be the name that appears in the sales consultant's Sales Step list.
Order	Enter the order in which this step will appear in the sales consultant's Sales Step list.
Active	This check box is selected by default. You can deselect it to deactivate this step, so it does not appear in the sales consultant's Sales Step list.

4. Continue to add records with this information until all of the sales steps have been added.

Creating Sales Step Goals (Dealer)

Dealers can calculate sales step goals for sales consultants, based on the monthly forecast. The monthly forecast projects total sales for the sales consultant for this period. The sales step goals use this forecast as the basis of a daily work plan, which gives the sales consultant a detailed list of sales steps that she wants to accomplish each day.

> **Note:** Before you calculate sales step goals, you must create the monthly forecast, as described in *Process of Creating the Monthly Forecast (Dealer)*.

The sales managers create sales step goals for their sales teams at the beginning of each period. It is usually the beginning of each month, but you might use different periods.

To create sales step goals for your sales team

1. Navigate to the Sales Step Goals screen.
2. From the Show drop-down list, select My Team's Sales Step Goals.
3. In the Sales Step Goals list, in the Period drop-down list, select the period that you are generating goals for.
4. In the Employees list, select the records of the employees whose sales step goals you want to create.
5. Click Create Sales Steps for Selected Employees.

   The goals are generated and appear in the Sales Step Goals list.
6. For each employee, for key goals, enter a value in the Close Ratio field.

   For example, a demonstration drive is a key goal, because it is closely connected to sales. If you estimate that sales consultants will sell one vehicle for every five demonstration drives they give, enter a close ratio of 20% for the demonstration drive sales steps. This allows the Siebel application to calculate how many times demonstration drives sales consultants will have to give each day in order to meet their monthly sales goal, in order to create the sales consultants' daily work plan.

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Viewing Daily Sales Step Goals (Dealer)

After the sales manager creates the goals, the sales consultants can view their own goals. When a dealer marks a sales step as done during the sales process, this sales step goals list is updated to record how many sales steps have been completed, so the sales consultants can look at their sales step goals lists regularly in order to check how their actual performance compares with their goals.

Sales consultants can also print out a report with their daily goals, so they have a written plan of their tasks for the day. Alternatively, sales managers can print out reports of daily goals for each of their sales consultants and can give these printed reports to the sales consultants each day.

To display your own sales step goals

1. Navigate to the Sales Step Goals screen.
2. From the Show drop-down list, select My Sales Step Goals.
3. View your goals in the Sales Step Goals list. The list includes the fields described in the following table.

Field	Comments
Sales Steps	Displays the sales step that this record applies to.
Period	Displays the period that this record applies to.
Monthly Forecast (Retail New)	Displays the monthly forecast for new retail vehicle sales for this employee for this period.
Monthly Forecast (Retail Used)	Displays the monthly forecast for used retail vehicle sales for this employee for this period.
Sales Step Monthly Goal (Retail New)	Displays the goal for this sales step for new retail vehicle sales for this employee for this period.
Actual (Retail New)	Displays the actual number of times this employee has performed this sales step for new retail vehicle sales for this employee for this period. This number of times that the employee has marked the sales step as completed for opportunities that have type *retail new*.
Sales Step Monthly Goal (Retail Used)	Displays the goal for this sales step for new retail vehicle sales for this employee for this period.
Actual (Retail Used)	Displays the actual number of times this employee has performed this sales step for new retail vehicle sales for this employee for this period. This number of times that the employee has marked the sales step as completed for opportunities that have type *retail used*.

You might want to print your own sales step goals.

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To print your own sales step goals

1. Navigate to the Sales Step Goals screen.
2. From the Show drop-down list, select My Sales Step Goals.
3. From the Reports menu, select Daily Work Plan Report.
4. Use the report window to print the daily work plan.

You might want to print your team's sales step goals.

To print your team's sales step goals

1. Navigate to the Sales Step Goals screen.
2. From the Show drop-down list, select My Team's Sales Step Goals.
3. In the Employee's list, select one of your team members.
4. From the Reports menu, select Daily Work Plan Report.
5. Use the report window to print the daily work plan for that team member.

Using Sales Steps (Dealer)

Sales steps are used in two ways:

- Sales consultants use them as a work plan, going through the sales steps in order to work each opportunity.

- While sales consultants are working opportunities, when they complete each step, they mark that it is completed. When they complete the sales step, an activity is created in the Activities screen, recording the sales step. This allows the Siebel application to track their progress to their goal and to generate the appropriate sales steps for the next day's work plan.

Dealer sales consultants use the Contact screen to mark sales steps as completed.

This task is a step in *Process of Creating and Using Sales Steps (Dealer)*.

To use sales steps

1. Navigate to the Contacts screen.
2. In the Contacts list, select the customer.
3. Click the Opportunities view tab.
4. In the Opportunities list, select the opportunity that is being worked on.
5. Under the Opportunities form, click the Sales Steps view tab.

   The Sales Step list appears, with all the steps that were defined in the Sales Step Administration screen.
6. In the record for the sales step that has just been completed, select the Completed check box.

   The current date is automatically entered in the Date field, the sales consultant's login name is automatically entered in the Sales Consultant field, and an Activity record is automatically created recording this sales step.

Tracking Sales Steps (Dealer)

Because an Activity record is created whenever a sales consultant completes a sales step, the sales manager can track the work of their sales consultants by displaying these activities.

This task is a step in *Process of Creating and Using Sales Steps (Dealer)*.

To track sales steps

1. Navigates to the Activities screen, My Team's Activities view.
2. Create a query to display all Activity records that have a sales consultant's login name in the Employee field and Sales Step in the Type field.

   The sales steps that this sales consultant has completed appear.

Process of Using the Showroom Log (Dealer)

The showroom log allows dealers to capture information about walk-in customers and customers contacting the retailer through phone, email, or the Web. It allows the dealer to record the customer's profile information, identify the purpose of the customer's visit or call (sales, service, or parts), and identify the customer's vehicle preferences, so customers can be assigned to the appropriate sales, service, or parts personnel.

This topic illustrates one typical use of the showroom log. In dealerships, prospective customers can talk to the receptionist when they arrive at the store, or they might talk to the sales manager or to another dealer employee.

> **Note:** This topic uses the receptionist as the example of the dealer employee who assigns customers to sales consultants as they become available, but in other business models, different employees might do this.

The receptionist can use the showroom log to enter information about customers and their vehicle preferences. This information is automatically used to create an Contact record and an associated Opportunity record for the customer.

Then, when a sales consultant is available, the receptionist uses the showroom log to assign the customer to this representative.

After the customer has been assigned, the sales consultant can find the information about this customer in the My Contacts screen, and can use this screen to work with the customer using all the information that the representative has captured in the showroom log.

To work with customers, dealers can perform the following steps:

1. *Entering Information About a New Customer in the Showroom Log (Dealer)*
2. *Working with a New Customer (Dealer)*

Entering Information About a New Customer in the Showroom Log (Dealer)

When prospective customers enter a dealership, they typically talk to the receptionist first. By filling out the fields in the showroom log, the receptionist enters the key information that the sales consultant will need to work with the customer.

While filling out the showroom log, the receptionist selects a sales consultant in the Employee field to assign the customer to this employee. The receptionist chooses a sales consultant who is available or will soon become available to work with new customers.

This task is a step in *Process of Using the Showroom Log (Dealer)*.

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If a new contact is entered, the information entered in the showroom log automatically generates a Contact record and an associated Opportunity record, which have this employee as the primary owner.

To enter information about the customer

1. Navigate to the Showroom Log screen.
2. Add a new record to the Showroom Log list, and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Employee	Select the sales consultant who will be the primary owner of this contact and opportunity.
Last Name	If this is an existing contact, select the contact. If this is a new contact, enter the last name and other information about the contact in the Contact area of the More Info form.
Campaign	If you select a campaign here before creating a new contact from the showroom log, the opportunity for that contact will automatically have this campaign entered in its Campaign field. You can choose from all campaigns associated with the dealer organization.
Opportunity	If this is an existing contact, select the opportunity. If this is a new contact, a new opportunity record is generated automatically.

Working with a New Customer (Dealer)

Now information about this customer is available to the sales consultant in the Contacts screens. The sales consultant uses this screen to work with the customer, for example, by entering activities or by sending the customer a letter or email. The sales consultant can also work with the customer using sales steps and printing forms, as described in the following topics.

This task is a step in *Process of Using the Showroom Log (Dealer)*.

To work with the customer

1. Navigate to the Contacts screen, My Contacts view.
2. In the Contacts list, select the record for this customer, and read information about this customer in the record and the More Info form.
3. Clicks the Opportunity view tab to read more information about this opportunity.
4. Select the Opportunity record.
5. The fourth-level navigation appears under the Opportunity form.
6. Use the fourth-level navigation to enter the buyer and cobuyer, to use sales steps, to enter activities, to capture trade-in information, to enter information about the vehicles that were shown to the customer, and to print forms.

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Entering Opportunities (Dealer)

In Siebel Dealer, the Opportunity record includes added fields that allow the dealer to enter information that is specific to the automotive industry.

The fields covered here are available in addition to the fields in the Opportunity records of other Siebel Business Applications. For more information about working with opportunities, see *Siebel Applications Administration Guide* .

To enter an opportunity

1. Navigate to the Opportunities screen.
2. Add a new record to the Opportunity list, and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Target Purchase Horizon	Select the time frame when the customer plans to buy the vehicle. The options are 0 to 3 months, 3 to 6 months, 6 to 9 months, and more than 9 months.
Monthly Budget	Enter the amount that the customer is willing to spend each month on vehicle payments.
Qualification Level	Select a number from one to six to represent the quality of an opportunity.
Purchase horizon start	Enter the date when the purchase horizon starts. For example, if you selected 0 to 3 months as the purchase horizon, enter today's date, and if you selected 3 to 6 months as the purchase horizon, enter the date three months from today.
Purchase Horizon End	Enter the date when the purchase horizon ends.
Lead Partner	Select the lead partner on the opportunity.

Assigning Unassigned Opportunities (Dealer)

In addition to the walk-in customers who are entered in the showroom log, there might be other opportunities displayed in the Unassigned Opportunities screen, which the dealer receptionist or some other dealer employee can assign to sales consultants.

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The Unassigned Opportunities screen does not display opportunities entered in the showroom log. It displays other opportunities that do not have an assigned sales consultant. For example, it can display Internet leads which were imported from other sources, so they do not have assigned sales consultants.

When an opportunity is assigned, the contacts for that opportunity also are automatically assigned to the sales consultant.

This task is a step in *Process of Using the Showroom Log (Dealer)*.

To assign an unassigned opportunity to a sales consultant

1. Navigate to the Unassigned Opportunities screen.
2. In the Unassigned Opportunities Log list, select the opportunity of the next customer.
3. Click Assign.
4. In the Pick Position dialog box, select a sales consultant and click OK.

Entering Vehicles Presented (Dealer)

During the sales process, a sales consultant might show several vehicles to the customer. As sales consultants show vehicles to customers, they can enter the vehicles that they have shown each customer. Recording the vehicles that were shown and were finally chosen by customers to buy is important to understanding customers' choices.

To enter vehicles shown to a contact

1. Navigate to the Contacts screen.
2. Click the name of the contact for this opportunity.

    The Opportunity form appears after the contact.
3. On the Opportunity form, click the Vehicles Presented view tab.
4. Add a new record to the Vehicles Presented list and complete the necessary fields. Some fields are described in the following table.

Field	Comments
VIN	Select the vehicle identification number. This picklist displays vehicles that are in the dealer's organization and have the status of available.
Quoted Price	Enter the price quoted to the customer.
Selected	Select this check box if the customer buys this vehicle.

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Viewing Others Who Have Accessed a Contact (Dealer)

Dealers must allow sales consultants to talk with the contacts of other sales consultants, in case the primary sales consultant for the contact is on leave or out of the store for some other reason. However, the primary sales consultant for a contact can view an audit trail of all other sales consultants who have accessed their contacts, to make sure that they do not lose those contacts to the other sales consultants.

When dealers click the search icon to search for a contact, they have the option of searching for my contacts or for all contacts. If sales consultants search for all contacts and click on a name in the search results to view information about a contact whose sales team the sales consultant is not on, Siebel Dealer allows the primary sales consultant for the contact to see in the audit trail that these other sales consultants have viewed information about the contact.

Primary sales consultants can view everyone not on the sales team who has done a search and displayed information about their contacts.

To display others who have displayed information about your contacts

- Navigate to the Others Accessing My Customer screen.
  The Others Accessing My Customer list appears. Each record includes the name of one of your customers, the name of another sales consultant who has accessed that customer, and the access date.

Reassigning Contacts and Opportunities (Dealer)

You can reassign a sales consultant's contacts or opportunities.

The option you select in the Dealer Preferences screen determines whether the old sales consultant is removed from the team when you reassign contacts or opportunities to a new sales consultant. For more information, see *Entering Dealer Preferences (Dealer)*.

Reassigning Contacts

Typically, contacts are reassigned when a sales consultant leaves a dealership.

The Reassign screen allows you to reassign all contacts where the sales consultant was the primary sales consultant for the contact. You can select multiple contacts and reassign all of them by clicking Reassign.

When you reassign contacts, opportunities and activities associated with the contacts are automatically reassigned also, if the sales consultant was the primary sales consultant for the opportunity, the contact was the primary contact for the opportunity, and the opportunity is not closed out.

To reassign a sales consultant's contacts

1. Navigate to the Reassign screen.
2. In the Reassign Contacts list, select the sales consultant whose contacts you want to reassign.
3. In the lower list, select one or more contacts and click Reassign.
4. In the dialog box, select the employee you want to reassign the contacts to, and click OK.

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Reassigning Opportunities (Dealer)

Typically, opportunities can be reassigned when a large number of opportunities have been developed as a result of a promotion.

The Reassign screen allows you to reassign opportunities in bulk. When you reassign opportunities, activities associated with the opportunities are automatically reassigned also.

To reassign a sales consultant's opportunities

1. Navigate to the Reassign screen.
2. In the Show drop-down list, select Reassign Opportunities.
3. In the Reassign Opportunities list, select the sales consultant whose opportunities you want to reassign.

   In the lower list, all opportunities appear that have the chosen sales consultant as the primary on the sales team.
4. In the lower list, select one or more opportunities and click Reassign.
5. In the dialog box, select the employee you want to reassign the opportunity to, and click OK.

Process of Printing Forms for Vehicle Sales (Dealer)

While sales consultants are working on a sale, they can use Siebel Dealer to capture credit information and print forms such as the buyer's worksheet, the trade-in appraisal form, and the credit appraisal form.

To create and print forms, dealers use the following steps:

1. *Creating Forms (Dealer)*
2. *Printing Forms (Dealer)*

Creating Forms (Dealer)

A dealer administrator can create templates that will be used as the basis of forms. After the managers define these templates, they will automatically be filled out with detail information about the current customer for the sales consultant to print out.

This task is a step in *Process of Printing Forms for Vehicle Sales (Dealer)*.

These forms are created in the same way as Siebel Proposals, and the process is described in detail in the topic about proposals in *Siebel Applications Administration Guide* .

The general process is:

- **Create a Proposal Field Mapping Record.** The dealer manager uses the Document Administration screen to create a mapping that specifies which fields from the Siebel database will be inserted in the Siebel Proposal. This allows the form to be automatically filled out with information about the customer.
    - o In Dealer, navigate to the Proposal Field Mapping view of the Document Administration screen.
    - o Create a new record with Business Object = *Contact*.
    - o Create a new record with Business Component = *Opportunity*.

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- Create new bookmarks associating these with the fields in the Opportunity Business component. For example, associate LastName with the Contact Last Name field.

- **Create a Form.** In Siebel Dealer, navigate to the Forms view of the Document Administration screen to create the form and to associate it with this mapping. This view is used in the same way as the Proposal Templates view, described in *Siebel Applications Administration Guide* . The Form record must have the following values:

  - The Name field must have a name that includes a substring identifying the type of form it is. For example, the name might include *WorkSheet* for the Buyer-WorkSheet Form, *TradeIn* for the Trade-In Form, and *CreditApplication* for the Credit Application Form.
  - The DefaultFlag field must be checked.
  - The Form Type field will be used by sales consultants to sort the forms. For example, a dealer might have several forms for trade-in evaluation. Enter Trade-In in the Form Type field when you create the form, and sales consultants will be able to select this form type to display all trade-in evaluation forms. You can create any form types that you want. The most common are:

    - **Buyers Worksheet.** Information about the customer that can be carried over to the finance manager for closing the lead.
    - **Trade-In Form.** Information to determine the trade-in value of the customer's current car.
    - **Credit Application.** Information needed to give the customer credit.
  - The file must be attached to the appropriate file system.
  - The Mapping field must contain the Mapping record name created in the previous step.

For more detailed information, see the topic about proposals in *Siebel Applications Administration Guide* .

Printing Forms (Dealer)

While working on an opportunity, the sales consultant prints out necessary forms.

To print forms

1. Navigate to the Contacts screen.
2. In the Contacts list, select the customer.
3. Click the Opportunities view tab.
4. In the Opportunities list, select the opportunity that is being worked on.
5. Under the Opportunities form, click the Forms view tab.
6. In the Forms list, in the Form Type field, select the type of form you want to produce.

   All forms of this type appear.
7. In the Forms list, click the Draft Name of a form.

   The form appears in the application that was used to create it. For example, it might appear as a Microsoft Word document.
8. Print out the form using the application that was used to create it.

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Generating Follow-Up Communications (Dealer)

The Employee and Customer Communication Rules Administration screen allows each dealership to create rules which automatically notify customers or sales consultants when certain conditions are met. The screen allows dealers to create the following types of rules:

- **Lease Expiry Rule.** This rule allows the dealer to contact the customer when a lease is about to expire. The dealer enters the number of days before expiration of the lease when this rule will run. If the dealer selects the Send Email to Customer check box, the rule sends an email to warn the customer that the lease will expire, unless the customer has specified not to send email. This email is based on a template that is built into Siebel Dealer, and it is personalized with information about the customer. If the dealer selects the Schedule Call for Sales Consultant check box, the rule creates an activity for the primary sales consultant for this customer, to contact the customer about the lease expiration. This rule only runs for opportunities whose sales stage is delivered.

- **No Activity After Sales Stage Rule.** This rule allows the dealer to contact the customer if the customer is not continuing the sales process. If there has been no activity for the specified number of days after an opportunity's sales stage has changed, this rule creates an activity for the sales consultant, with the type No Activity and with a link to the opportunity. The dealer enters the number of days and checks the Notify Sales Consultant check box. This rule does not run for opportunities whose sales stage is delivered.

- **Vehicle Sales Anniversary Rule.** This rule allows the dealer to contact the customer one year after the car has been delivered. This runs one year after the sales stage becomes delivered. If the dealer selects the Send Email to Customer check box, the rule sends an email to the customer which is based on a template that is built into Siebel Dealer and which is personalized with information about the customer. If the dealer selects the Schedule Call for Sales Consultant check box, the rule creates an activity for the primary sales consultant for this customer, to contact the customer.

- **Vehicle Sales Follow-up Rule.** This rule allows the dealer to contact the customer at any time interval after the sales stage becomes delivered. The dealer enters the number of days after vehicle sale when the rule will run. If the dealer selects the Send Email to Customer check box, the rule sends an email to the customer which is based on a template that is built into Siebel Dealer and which is personalized with information about the customer. If the dealer selects the Schedule Call for Sales Consultant check box, the rule creates an activity for the primary sales consultant for this customer, to contact the customer.

These rules apply only to the dealership where they are created.

> **Note:** For any of these rules to run, Siebel Business Process Manager and the appropriate Siebel Communication Manager server components must be running. In addition, you must use the Siebel Business Process Manager Administration screen to activate the workflows named: Lease Expiry Rule, No Activity After Sales State Rule, Vehicle Sales Anniversary Rule, and Vehicle Sales Follow-up Rule.

To create rules for contacting customers

1. Navigate to the Dealer Preference screen.
2. In the link bar, click Communication preferences.

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3. Click the Lease Expiry Rule view tab, and enter values for the fields, as described in the following table.

Field	Comments
Number of Days to Check for No Activity	Enter the number of days with no activity after reaching a sales stage when this rule will act.
Notify Sales Consultant	Select this check box to notify the sales consultant that there is no activity. The application notifies the sales consultant by creating a record that the sales consultant can see in My Activities view.

4. Click the No Activity After Sales Stage Rule view tab, and enter values for the fields, as described in the following table.

Field	Comments
Number of Days to Check for No Activity	Enter the number of days with no activity after reaching a sales stage when this rule will act.
Notify Sales Consultant	Select this check box to notify the sales consultant that there is no activity. The application notifies the sales consultant by creating a record that the sales consultant can see in My Activities view.

5. Click the Vehicle Sales Anniversary Rule view tab, and enter values for the fields, as described in the following table.

Field	Comments
Send Email to Customer	Select this check box to send an email about the vehicle anniversary to the customer.
Schedule Call for Sales Consultant	Select this check box to create an activity for a sales consultant to call this customer.

6. Click the Vehicle Sales Followup Rule view tab, and enter values for the fields, as described in the following table.

Field	Comments
Number of Days After Vehicle Sales	Enter the number of days after the vehicle is sold that this rule will act.
Send Email to Customer	Select this check box to send an email about the vehicle sale to the customer.
Schedule Call for Sales Consultant	Select this check box to create an activity for a sales consultant to call this customer.

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Field	Comments

Marking Opportunities as Closed (Dealer)

When sales consultants finish working on opportunities, they mark the opportunities to be closed when they give each opportunity a sales stage that has been associated with the status of won or lost. The OEM creates sales stages, as described in *Siebel Automotive Guide* .

After opportunities have a stage associated with the status of won or lost, they appear in the Opportunities to Close screen, so managers can review them and close them out. The manager can close out activities that are sales-related.

After opportunities are closed out, they are still displayed in the Opportunities screen, but the follow-up activities for these opportunities no longer appear as activities for the sales consultants.

To mark opportunities to be closed

1. Navigate to the Contacts screen.
2. Click the name of the contact for this opportunity.

   The Opportunity form appears after the contact.
3. In the Opportunity form, in the Sales Stage field, select the sales stage associated with the status of won or lost.

   The name of this sales stage depends on the sales stages that the OEM defined. For example, the system administrator at the OEM might have created a sales stage called *Closed Won* and associated it with the status of Won in the Sales Methods view of the Application Administration screen.
4. On the Opportunity form, click the Reason to Close view tab.
5. In the Reason to Close form:

   a. Select the reason the opportunity was closed.
   b. Select the make and model of the car the customer bought.
   c. If you lost the opportunity to another dealer, enter the name of the dealer.

You might want to review and cancel an opportunity.

To review and cancel opportunities

1. Navigate to the Opportunities To Close screen.

   The Opportunities To Close list includes all opportunities with a stage associated with the status of won or lost.
2. Review the Opportunities list to decide which opportunities can be cancelled.

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3. To cancel an opportunity:

   a. Select a record in the Opportunity to Close list, and complete the necessary fields in the Reason to Close form.

   b. Click Opportunity Close Out.

   The application cancels all open activities associated with this opportunity that have the category of sales activity.

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4 Managing Marketing Campaigns (Dealer)

Managing Marketing Campaigns (Dealer)

This chapter covers special features available only to dealers that help dealers to manage marketing campaigns. It includes the following topics:

- *Marketing Features of Siebel Dealer*
- *Scenarios for Using Siebel Dealer for Marketing*
- *Using Queries for Marketing Campaigns (Dealer)*
- *Refreshing Queries for Marketing Campaigns (Dealer)*
- *Merging Lists for Marketing Campaigns (Dealer)*
- *Adding Labor Operation Codes to Marketing Campaigns (Dealer)*
- *Associating Campaigns with Vehicles (Dealer)*
- *Creating a Recall Campaign (Dealer)*
- *Executing Marketing Campaign Offers (Dealer)*
- **Note:** This chapter only includes marketing features that are specific to Siebel Dealer. It must be used in combination with *Siebel Marketing Installation and Administration Guide* and *Siebel Marketing User Guide* .

Marketing Features of Siebel Dealer

Siebel Dealer allows the OEM to collaborate with dealers on marketing. For more information, see *Sales, Service, and Marketing with Siebel Dealer*.

Because dealers are generally the one direct point of contact with the customers of auto manufacturers, they need more marketing capabilities than most partners do. They need the ability to run marketing campaigns themselves, and they need greater visibility into marketing campaigns that the OEM runs.

To give dealers these capabilities, Siebel Dealer makes the Campaign Administration screen available and some views of the Offers screen. Dealers can use these screens in many of the same ways that they are used in Siebel employee applications. For more information about using these screens in collaborative marketing campaigns, see *Siebel Marketing Installation and Administration Guide* and *Siebel Marketing User Guide* .

Dealers do not base their marketing campaigns on the sophisticated segmentation that is used with Siebel Marketing. Instead, Siebel Dealer gives them simple methods to:

- Perform queries on entities such as contacts, vehicles, opportunities, sales history, and service history to produce lists of contacts and associated vehicles.
- Merge these lists to create a new list based on intersection, union, or subtraction of the merged lists.
- Associate the lists with a campaign.
- Associate an offer - email, web, or direct mail - with a campaign.
- Run the campaign to send the appropriate personalized offer to the targeted customers.

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Using Siebel Dealer, you execute campaigns slightly differently than in other Siebel Business Applications. For more information, see *Executing Marketing Campaign Offers (Dealer)*.

Siebel Dealer also adds many features to the Campaign Administration screen that are specific to the automotive industry and are not included in other Siebel Business Applications. There are added fields in the following views of the Campaign Administration screen:

- **More Info.** The Category field is added to this view, which is used to distinguish between sales, service, and parts campaigns. This field is a picklist with three options, Sales, Service, and Parts.

- **Define Query.** Siebel Dealer includes a Define Query view in the Campaign Administration screen. For more information, see *Using Queries for Marketing Campaigns (Dealer)*.

- **Lists.** This view allows dealers to merge lists, and the rows include two new fields to support the merge. For more information, see *Merging Lists for Marketing Campaigns (Dealer)*. In addition, this view has added applets: the List of Contacts list displays the contact information for the selected record in the Lists list, and the Vehicles list displays the vehicles for the selected contact.

- **Contacts/Prospects.** This view has an added Create Service Request button, which allows dealers to create a service request for the selected contact or prospect. It also includes an added Vehicle list, which displays the vehicles of the selected contact or prospect.

- **Offers.** This view allows the dealer to add Word document templates with merge fields for personalization as direct mail offers.

- **Team.** This view allows the dealer to create activities for employees executing direct mail or phone offers. The dealer clicks the Create Activity button to create the activities.

- **Labor Operations Code.** Siebel Dealer includes a new Labor Operations Code view in the Campaign Administration screen. For more information, see *Adding Labor Operation Codes to Marketing Campaigns (Dealer)*.

In addition to these modifications in the Campaign Administration, Siebel Dealer adds or modifies the following screens used in marketing campaigns.

- Query Administration screen. This added screen allows the dealer to manage queries by creating, editing and deleting queries. The user cannot run queries from this screen.

- List Management screen. Only lists for the dealer's organization are displayed. This screen includes only the following views:

    - Lists View
    - Campaigns View

- Offers screen. This screen includes only the following views:

    - All Offers View
    - All Offers Products View
    - Direct Mail Offer View
    - Direct Mail Offer Literature View
    - Email Offer View
    - Email Offer Templates List View
    - Email Offer Detail View
    - Email Profile Parameter View
    - Email Offer Attachments View

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      o Related Web Offers View

      o Related Web Surveys View for Email

      o Email Offer Related URLs View

      o Phone Offer Detail View

      o Phone Offer Literature View

      o Phone Offer Call Guide View

      o Web Offer View

      o Web Offer Detail View

      o Related Web Surveys View

      o Web Offer Related URLs View

Scenarios for Using Siebel Dealer for Marketing

This scenario gives several examples of how dealers use Siebel Dealer's marketing features. Your dealers might use these features differently, depending on your business model.

Some typical uses of Siebel Dealer for marketing are:

- Dealers can view personalized promotions that the OEM sends to target customers, so they can follow up on these promotions when the customers come to the showroom.

- Dealers can run email campaigns to tell prospects about sales events. For example, a dealer could search for all customers who expressed interest in a specific model in the past month and send email to them to tell them that there will be a sales event for that model.

- Dealers can search for prospects who requested follow-ups and schedule activities to have sales representatives call these prospects.

- Dealers can search for and send personalized letters to customers whose leases are about to expire, to up-sell vehicles to these customers.

- Dealers can run follow-up campaigns after OEM recalls. A dealers can search for customers who own the vehicles with the recall code, search for customers who have already brought the vehicle for service, and send a reminder offer to customers who own the vehicle and have not gotten the needed service.

Using Queries for Marketing Campaigns (Dealer)

Dealers use queries so they can target marketing campaigns properly. Dealers can query Contacts, Contact Vehicles, Service History Contact, Sales History Contact, Opportunity Primary Contacts. For example, dealers can use these queries to search for prospective customers who expressed interest in a specific model, who requested follow-ups, or whose leases are about to expire, in order to target marketing campaigns at these specific groups.

You enter criteria to identify these prospective customers. The examples mentioned previously all include just one criteria, but you can also enter multiple criteria. If you enter multiple criteria, you must specify whether the query will include contacts if they match all the criteria, or if they match one or more of the criteria.

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For example, if you want to target customers who expressed an interest in a specific model and who requested follow-ups, you can create a query with these two criteria. In this case, the query can include the customer only if both criteria are satisfied.

The high-level steps for defining and using a query are:

- Enter general information about the query in the Query list,

- Enter one or more criteria for the query in the Criteria list.

- Click Run Query. All the contacts who match the query are displayed in the Target list.

- Click Add to Campaign. All the contacts in the Target list are moved to the Campaign Contacts view, so they can be used in the campaign.

Note: Before you can add a query result to a campaign, the campaign must have a status of In Planning.

To define and use a query for a marketing campaign

1. Navigate to the Campaign Administration screen.
2. In the Campaigns list, click the name of the campaign you want to define a query for.
3. Click the Define Query view tab.
4. In the Show drop-down list, choose the entity that you want to query.

   Options are Contact, Opportunity, Sales History, Service History, Vehicle.
5. Add a new record to the Define Query list, and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Criteria	If you are using multiple criteria, select Match ALL Criteria (AND) if you want the query to find only records where all criteria match, or select Match ANY Criteria (OR) if you want the query to find records where at least one criteria matches. If you are using a single criteria, this field is meaningless, and you can leave the default Match ALL Criteria (AND).
Query Expression	Displays the expression that you build using the Query Criteria list.

6. Add one or more new records to the Criteria list, and complete the necessary fields, described in the following table.

Field	Comments
Field	Select a field of the Contact record.
Criteria	Select an operator. The values that are available depend on what you selected in Field.
Value	Enter a value to be compared with the content of the field. The field becomes read-only if you selected Is Empty or Is Not Empty in the Criteria field, because you do not enter a value in this field for those criteria.

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Field	Comments
	Enclose text or date values in single or double quotation marks. Numeric values do not need quotation marks.
	You can enter simple expressions, such as:
	o 'John' OR 'Mary'
	o Today() + 2

7. Click Run Query.

   Records that match the criteria appear in the Target List.

8. Optionally, to save this list, click Save List.

   You are prompted you to enter a name and description for the list. The saved list will appear in the Lists view of the Campaign Administration screen.

9. To add this list to the campaign, click Add to Campaign.

Refreshing Queries for Marketing Campaigns (Dealer)

When you create queries for marketing campaigns, the query is saved. You can rerun the saved query at any time to get a result based on the latest data about customers.

To run a saved query

1. Navigate to the Lists view of the Campaign Administration screen.
2. In the Lists list, select a list.
3. To rerun the query and refresh the list, select Run Query in the applet menu.

Merging Lists for Marketing Campaigns (Dealer)

Dealers can merge two lists for marketing campaigns. When you merge lists, you can produce a new list that has:

- All the records that are in either list.

- Only the records that are in both lists.

- Records that are in the first list but not the second.

You can merge lists to avoid contacting the same customer twice. Or you can create queries to produce lists, and then you can merge these lists to create lists based on more complex criteria.

Note: Lists must have the status of active to be merged.

To merge lists for marketing campaigns

1. Navigate to the Campaign Administration screen.
2. In the Campaigns list, click the name of the campaign that contains the lists you want to merge.
3. Click the Lists view tab.
4. If the campaign has not already been associated with a list, click Add List to add a new record to the Lists list, and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Primary	Select this check box to indicate that the list is the primary list in the merge. Every merge must have one list that is the primary list. This selection only makes a difference to the results if you choose to produce a merged table that has the customers in the first list but not in the second. The primary list is used as the first list.
Status	Displays the status of the lists you added. For the merge to work, this field must have the value Active.

5. Repeat Step 4 to add a second record to the Lists list.

   You must add exactly two records to the Lists.
6. To merge the table, click one of these buttons:

   - Customers in Either List

   - Customers in Both Lists

   - Customers in First List But Not Second
7. The Merge List Description dialog box appears, so you can enter a name and description of the new list.
8. To add the merged list to the campaign, make sure it is selected and click Add to Campaign.

Adding Labor Operation Codes to Marketing Campaigns (Dealer)

When OEMs do a service campaign, such as a campaign that gives customers a discount on a lubrication job, they assign a labor operation code to identify whether the service job qualifies for the offer.

Labor Operation Codes are part of a vehicle's service history, which is imported into the Siebel application from the Dealer Management System.

To add a labor operation code to a marketing campaign

1. Navigate to the Campaign Administration screen.
2. In the Campaigns list, click the name of the campaign you want to add labor operation codes to.

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3. Click the Labor Op view tab.
4. Add a new record to the Labor Op list, and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Code #	Select the labor operation code.
Description	Enter a description of the labor operation.

Associating Campaigns with Vehicles (Dealer)

Dealers can associate marketing campaigns with vehicles. They can associate one vehicle with one or more campaigns, and they can associate one campaign with one or more vehicles.

Then they can view the all of the campaigns that are relevant to a vehicle or relevant to the vehicles owned by a contact.

By entering the recall status of the vehicle, dealers can tell whether this marketing campaign is a recall campaign.

To associate a campaign with a vehicle

1. Navigate to the Campaign Administration screen.
2. In the My Campaigns list, click the Name of the campaign that you want to associate vehicles with.
3. Click the Vehicle view tab.
4. Add new records to the Vehicle list, and select vehicles from the Add Vehicles dialog box.

You might want to view campaigns for a vehicle.

To view campaigns for a vehicle

1. Navigate to the Vehicles screen.
2. In the My Vehicles list, click the name of the vehicle that you want to see the associated campaigns for.
3. Click the Campaigns view tab.

   The Campaigns list appears, with all the campaigns for this vehicle.

You might want to view campaigns for a contact.

To view campaigns for a contact

1. Navigate to the Contacts screen.
2. In the My Contacts list, click the last name of the contact you want to see the associated campaigns for.
3. Click the Campaigns view tab.

   The Campaigns list appears, with all the campaigns for this vehicle.
4. Click the Vehicles view tab.

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The Vehicles list includes all the vehicles for the contact.

5. Select a vehicle in the Vehicles list, and scroll down to see the Vehicle Campaigns associated with this vehicle.

Creating a Recall Campaign (Dealer)

If the OEM recalls a vehicle because of a defect, dealers can manage this recall as a campaign.

The dealer creates the campaign and offers in the usual way. In the Category field, the dealer selects Recall. The dealer associates the recalled vehicle with the campaign. Then the dealer can execute the campaign in the usual way to contact all customers who have bought that vehicle from them and to track the customers' responses to the recall.

To create a recall campaign

1. Navigate to the Campaign Administration screen.
2. In the Campaigns list, add a new record and fill out the necessary fields.

   In the Category field, select Recall.
3. Associate the recalled vehicle with the campaign, as described in *Associating Campaigns with Vehicles (Dealer)*.

Executing Marketing Campaign Offers (Dealer)

After the dealer has finished creating the marketing campaign and offer, the dealer executes the offer by sending emails or creating form letters.

To execute a marketing campaign offer

1. Navigate to the Campaign Administration screen.
2. Click the name of the campaign that you want to execute.
3. Click the Offers view tab.
4. In the Offers list, select the offer that you want to execute.
5. To execute the offer by direct mail, click Create Letter.
6. To execute the offer by email, in the Campaign form, select Launch Campaign from the menu.

   Not all users can launch an email campaign. For more information about the restrictions, see *Siebel Marketing User Guide* .

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5 Managing Captive Finance and End of Lease (Dealer)

Managing Captive Finance and End of Lease (Dealer)

This chapter covers the use of Siebel Dealer for captive finance and for end-of-lease activities. It includes the following topics:

- *About Using Siebel Dealer for Captive Finance and End of Lease*
- *Using Siebel Dealer for Credit Origination*
- *Associating Vehicles with Loan Applications*
- *About Using Siebel Dealer for End-of-Lease Activities*

About Using Siebel Dealer for Captive Finance and End of Lease

Dealers can use Siebel Dealer in the following ways:

- **Credit Origination.** When customers buy or lease cars, they often get loans from the financial institution specified by the automotive company. This is sometimes called *captive finance*. When a customer applies for credit to buy or lease a vehicle, the dealer can use Siebel Dealer to fill out the financing application and submit it to the finance company.
- **End of Lease.** When a customer returns a leased vehicle, the dealer can inspect, receive, and optionally buy the returned vehicle. The dealer can use Siebel Dealer to report the condition of the returned vehicle and to purchase the vehicle. If the receiving dealer does not purchase the vehicle, it is offered to other dealers using Siebel Dealer.

Using Siebel Dealer for Credit Origination

During credit origination, the dealer uses the following views to create and manage credit applications:

- **Application screen, Applications list view.** This view and its subviews are used to create applications and to enter and track their details. These views are the same as the views with the same names in Siebel Automotive and Siebel Finance.
- **Contacts screen, Contact List, Contact Applications view.** This view is used to view applications for a contact. This is the same as the Contacts screen, Contact List, Applications view of Siebel Automotive and Siebel Finance.
- **Accounts screen, Accounts List, Account Applications view.** This view is used to view applications for an account. This is the same as the Accounts screen, Accounts List, Applications view of Siebel Automotive and the same as the Companies screen, Companies List, Applications view of Siebel Finance.

For information about how to use these views to create and manage an application, see the topic about managing Siebel Finance applications in *Siebel Finance Guide* .

> **Note:** Not all of the information in *Siebel Finance Guide* applies to Siebel Dealer, only the information describing views that are included in Siebel Dealer.

Associating Vehicles with Loan Applications

After creating the loan application, as described in *Siebel Finance Guide* , the dealer uses the Vehicles screen to associate the loan application with the vehicle that the loan is being used to purchase or lease.

To associate a vehicle with a loan application

1. In Siebel Dealer, navigate to the Vehicles screen, then the Auto Vehicle List view.
2. In the Vehicles list, click the VIN of the vehicle that the loan applies to.
3. Click the Financing Applications view tab.
4. In the Applications list, click New.

   The Applications dialog box appears.
5. In the Applications dialog box, select the loan application for this vehicle and click OK.

About Using Siebel Dealer for End-of-Lease Activities

Dealers use Siebel Dealer for the following end-of-lease activities:

- *Entering Inspection Information*
- *Viewing Turn-In Appointments*
- *Entering Returned Vehicles*
- *Purchasing or Declining Returned Vehicles*

For general information about end-of-lease activities and about how the automobile company and dealers work together on these activities, see *Siebel Automotive Guide* .

Entering Inspection Information

When a lease ends, the dealer can inspect the vehicle and can use Siebel Dealer to enter details about the condition of the vehicle. After it is entered, the automobile company can view the information through Siebel Automotive.

To enter details about the condition of the vehicle

1. In Siebel Dealer, navigate to the Financial Accounts screen, then the Financial Accounts list view.
2. In the Financial Accounts list, click the account number of the financial account you want to work with.
3. Click the Assets/Vehicles view tab to confirm that the vehicle you are inspecting is on the assets/vehicles list for this financial account.

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> **Note:** If the vehicle is not on the list, click New and add it to the list.

4. Click the Asset Inspection view tab.
5. Add a new record to the Asset Inspection list and complete the necessary fields, described in the following table.

Field	Comments
Ordered	Enter the date the inspection was ordered. Default is the current date.
Asset ID/VIN #	Select the vehicle. The dialog box allows you to select from the vehicles that are listed in the Assets/Vehicles view for this financial account.
Canceled	If the inspection was canceled, enter the cancellation date.
Received	Enter the date the vehicle was received.
Inspected	Enter the date of inspection.
Odometer Current	Enter the odometer reading determined during the inspection.
Customer Available	Select a value indicating the customer's availability during the inspection. Options are: Not Present, Present, Signed Inspection.
Company	Select the name of the inspecting company.

6. In the Body Assessment form, complete the necessary fields, described in the following table.

Field	Comments
Number	Enter the number of small dings, dents and scratches found during inspection.
Charges	Enter the charge for each small ding, dent, or scratch.
Total	Displays the total charge for small dings, dents, and scratches.
Number	Enter the number of large dings, dents and scratches found during inspection.
Charges	Enter the charge for each large ding, dent, or scratch.

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Field	Comments
Total	Displays the total charge for large dings, dents, and scratches.
Total Assessment	Displays the total charge for small and large dings, dents, and scratches.

7. In the Excess Usage form, fields are either filled in by default or calculated, as described in the following table.

Field	Comments
Odometer Current	Displays the current mileage. This is filled in by default based on the odometer reading entered in the vehicle inspection record.
At Contract Signing	Displays the mileage when the contract was signed. This is filled in by default based on information entered when the contract was signed.
Used	Displays the mileage driven. Calculated as Current - At Contract Signing.
Contracted	Displays the mileage the user was allowed to drive without an extra fee. This is filled in by default based on information entered when the contract was signed.
Excess	Displays the excess mileage driven. Calculated as Driven - Contracted.
Per Mileage Charge	Displays the charge for each mile that exceeds the limit. This is filled in by default based on information entered when the contract was signed.
Total	Displays the total charge for excess mileage. Calculated as Excess multiplied by Per Mileage Charge.

8. In the Other Charges list, add a record for each additional charge, such as the disposition fee or charges for parts, and complete the necessary fields, described in the following table.

Field	Comments
Type	Select the type of charge. Options are: Disposition Fee, Broken Odometer, Bad Tire.
Comments	Enter comments about the damage.
Amount	Enter the amount charged for the damage.

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Field	Comments

Viewing Turn-In Appointments

The automotive company can make appointments for customers to turn in cars at dealers. For more information, see *Siebel Automotive Guide* .

The dealer can view the appointment for an account.

To view turn-in appointments

1. In Siebel Dealer, navigate to the Financial Accounts screen, then the Account List view.
2. Drill down on the desired account.
3. Click the Asset Turn In view tab.

    The date and time of the turn-in appointment appear in the Turn-in Date field.

Entering Returned Vehicles

When the vehicle is turned in, the dealer receives it and enters information about it in the Vehicle Return Manager, and prints out a return receipt to give to the customer.

To enter information about the returned vehicle

1. In Siebel Dealer, navigate to the Vehicle Consignment screen, then the Vehicle Return Manager view.
2. Query in the Serial Number field to find the appropriate record.
3. Complete the necessary fields, described in the following table.

Field	Description
Odometer Reading	Enter the mileage on the odometer of the returned car.
Actual Turn-In Date	Enter the date.

4. To finalize your acceptance of the vehicle, click Complete Return.

    A vehicle return receipt is generated and appears in the Receipts list.
5. Select the Receipt record, and select Print from the Receipts menu to print the return receipt, which must be signed by both the dealer and the customer.

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Purchasing or Declining Returned Vehicles

Dealers check the Vehicle Purchase List view of the Dealer Portal periodically to determine whether they might want to buy any vehicles listed in that view. If they are interested in a vehicle, they can drill down on it in the list to see more details about it.

When the automobile company posts the vehicle on the Dealer Portal, it is visible initially only to the dealer who received it. If that dealer declines to buy the vehicle or if that dealer does not act within three days after it is posted, then the vehicle becomes available to all the dealers in the same territory as this dealer.

The territory is a geographical area that is associated with every dealer.

To purchase or decline to purchase a returned vehicle

1. In Siebel Dealer, navigate to the Vehicle Consignment screen, then the Vehicle Purchase view.
2. In the Vehicles Available for Purchase list, select the record for the vehicle you want to purchase or decline.
3. To decline to purchase the vehicle, click Not Interested.
4. To purchase the vehicle, click Purchase Vehicle.

   The Vehicle Purchase Confirmation dialog box appears, including a confirmation number for the purchase.
5. Click Print to print the sales order.

6 Managing Business Rules for Dealers

Managing Business Rules for Dealers

This chapter covers creating and using business rules for dealers. It includes the following topics:

- *About Business Rules for Dealers*
- *Process of Creating Business Rule Templates for Dealers*
- *Creating Business Rules That Apply to All Dealers*
- *Setting the Time When Dealer Business Rules Execute*
- *Viewing, Deactivating, and Reactivating Subscriptions to Dealer Business Rules*
- *Viewing Executions of Dealer Business Rules*
- *Subscribing to Dealer Business Rules (Dealer)*
- *Changing the Parameters of Dealer Business Rules (Dealer)*
- *Activating Dealer Business Rules (Dealer)*
- *Viewing Executions of Dealer Business Rules (Dealer)*
- *Configuration for Dealer Business Rules*

About Business Rules for Dealers

Business rules can be used in several ways:

- OEMs can provide rule templates for dealers to use as a starting point for automating their operations.
- Dealers can subscribe to rules that the OEMs provided and can change these rules using Siebel Dealer.
- OEMs can create rules that dealers have to follow.

For example, for a special promotion, dealers might want to send letters to customers whose hobby is sailing. The OEM can create a template that generates these letters and sends them to a fulfillment house for mailing.

In this example, while creating the rule, the OEM could set two parameters: the form-letter template used for the letter and the fulfillment house that mails the letters. After the OEM creates and publishes these business rules, dealers can use them. Dealers can change these parameters to select a different form letter or a different fulfillment house.

Using the actions that are shipped with Siebel Dealer, you can create business rules that send letters, send emails, and create activities for sales or service representatives. By creating additional actions, you can also create business rules that automate many other tasks.

There are two other features that you can use to supplement these business rules:

- You can use the Dealer Preference screen to define rules that send emails or create activities when a lease expires, when there is no activity in the sales process, when there is an anniversary of a vehicle sale, or when you might consider following up on a vehicle sale. The dealer can also use this screen to create other rules. For more information, see *Generating Follow-Up Communications (Dealer)*.

- You can use Delegated Assignment Manager to define rules for assigning opportunities or service requests. For more information, see *Siebel Assignment Manager Administration Guide* .

Process of Creating Business Rule Templates for Dealers

To create a business rule template, you must create three records:

- **Business Rule Template.** The business rule template includes general information about the business rule. You also use this record to select the business object that the rule applies to. For example, to send an email to customers on their birthdays, you would select Contact in the Object field, because the customer's birthday is a field in the Contact record.

- **Criteria.** The criteria determines whether the rule applies to a record. You select a field in the business object, a condition and a value. For example, you could create the criteria Hobby Equals Sailing, so the rule only applies if Sailing is entered in the Hobby field in the Contact record. A rule can also have multiple criteria.

Criteria can also use functions such as Today(), so you can create criteria such as Birthday=Today for a rule that runs on the customer's birthday. Criteria can use all the functions that can be used in calculated fields. For more information about these functions, see *Using Siebel Tools* .

- **Action.** The action determines what the rule does. You choose the action from a list of actions that apply to the business object, and you select the appropriate parameters for this action. For example, you could choose the action Send Letter to the Contact. For this action, the parameters you choose are the form letter template and the fulfillment house. A rule can also have multiple actions.

To create a business rule template, perform the following tasks:

1. *Creating New Actions for Dealer Business Rules* (optional)
2. *Adding Dealer Business Rule Templates*
3. *Adding Criteria for Dealer Business Rules*
4. *Adding Actions for Dealer Business Rules*
5. *Publishing Dealer Business Rules*

Creating New Actions for Dealer Business Rules

In addition to the actions that are available when you install Siebel Dealer, you can create actions to be used by Siebel Dealer business rules.

The actions that are available when you install the product fall into the following categories:

- **Sending a Letter.** There are actions that allow dealers to send form letters to contacts based on information in the Contacts record. The parameters are Letter Template and Fulfillment Center.

- **Sending Email.** There are actions that allow dealers to send form email to contacts based on information in the Contacts, Opportunities, Sales History, Service History or Vehicles record. The rule sends email to the primary contact for the record. The parameter is Email Template.

- **Creating an Activity.** There are actions that allow dealers to create an activity for a sales representative or service representative based on information in a contact, opportunity or vehicle record. The parameters are Description, Due in Days, Priority, Status, and Type, and the values you enter for these parameters appear in the corresponding fields of the Activity record. The activity is automatically assigned to the primary member of the sales team for the contact or opportunity.

For information about how to create additional actions for business rules beyond those listed here, see *Configuration for Dealer Business Rules*.

After creating the appropriate workflow or business service, you add the action to the Action Types list, so it can be used by business rules.

This task is a step in *Process of Creating Business Rule Templates for Dealers*.

To add an action

1. Navigate to the Administration - Business Rules screen.
2. Click Action Types.
3. Add a new record to the Action Types list and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Name	Enter a descriptive name for the action. It is recommended that this name include the object that the action applies to, such as Send Email to Contact.
Object	Select the business object that the action is based on.
Type	Select either Workflow or Business Service.
Mode	Select an option to determine whether the workflow or business service for this rule is invoked for each record or invoked only once. This feature allows the OEM to create workflows or business services that take care of all the records in the query, rather then the usual workflows or business services that take care of only one record.
Workflow	If you selected Workflow in the Type field, select the workflow. If you selected Business Service in the Type field, this field is disabled.
Business Service	If you selected Business Service in the Type field, select the business service. If you selected Workflow in the Type field, this field is automatically filled in with Workflow Process Manager (the business service that runs workflows).
Method	If you selected Business Service in the Type field, select the method. If you selected Workflow in the Type field, this field is automatically filled in with Run Process (the method that runs workflows).
Id Field	Contains the method argument that corresponds to the Row Id of the record being processed, which is passed to the method when it is called. If you selected Workflow in the Type field, then this field will contain the Row Id by default. If it is a different type, select one of the business service method arguments.

4. To enter parameters for the action, scroll down and add one or more records to the parameter list which appears after the Action Types list, and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Name	Enter a name for the parameter.
Type	Select the way that the argument will be displayed in the user interface. For example, if you select PickList as the type, the user will use a picklist to select the argument, and if you select Checkbox, the user will use a check box to specify the argument.
Read Only	Read only is selected, because this argument is read-only on the dealer side. Only the host can specify a value for the argument in the template, and the dealers cannot change the value of this argument.
Workflow Property/Method Argument	If the action type is workflow, this field displays as Workflow Property, and you must enter the argument value that will be assigned to the workflow property. If the action type is business service, this field displays as Method Argument, and you must enter the method argument to which the value of this parameter will be assigned.
PickList/PickApplet/PickField	If you selected Picklist in the Type field, use the PickList field to select the picklist that will be displayed in the user interface. If you selected PickApplet in the Type field, use these three fields. The picklist will be used to setup the pickmap, the pick applet will be displayed in the user interface, and the pick field value will be picked into the argument. If you selected any other type, leave these fields blank.

Adding Dealer Business Rule Templates

If the actions you need have already been created, you can begin to create a business rule by adding the business rule template, which contains general information about the rule.

This task is a step in *Process of Creating Business Rule Templates for Dealers*.

To add a business rule template

1. Navigate to the Administration - Business Rules screen.
2. Click Business Rule Templates.

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3. Add a new record to the Business Rule Templates list and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Object	Select the business object the business rule is based on. Both the criteria and the action for the business rule will have to use fields from this business object.
Published	After you have completed the entire process of creating the business rule, you will select this check box to make the business rule available to dealers.
Frequency	Select how frequently the business rule will run. The options are daily, weekly, or monthly.
Start Date/Time	Enter the date and time when the business rule will become active.
End Date	Enter the date when the business rule will become inactive.

Adding Criteria for Dealer Business Rules

You enter the criteria for a business rule to specify whether or not the rule will apply to a given record.

This task is a step in *Process of Creating Business Rule Templates for Dealers*.

You enter the criteria by selecting a field, selecting a condition, and entering a value. For example, if the criterion is *Hobby equals Sailing*, then you select *Hobby* as the field, select *equals* as the condition, and enter *Sailing* as the value.

You can also enter multiple criteria. If you do this, you must choose one of the following options:

- **Match ALL Criteria (AND).** The rule applies only if all the criteria are true.
- **Match ANY Criteria (OR).** The rule applies if any one of the criteria is true.

For example, to send letters to all customers whose hobby is either sailing or bicycling:

- Enter the two criteria *Hobby equals Sailing* and *Hobby equals Bicycling*.
- Choose *Match ANY Criteria (OR)*.

To add criteria for a business rule

1. Navigate to the Administration - Business Rules screen.
2. Click Business Rule Templates.
3. Click the template name of the business rule template you want to add criteria for, and click the Criteria view tab.

4. Add one or more new records to the Criteria list and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Field	Select the field whose value the criteria is based on. You can only select fields in the business object that you selected in the Business Rule Template record.
Condition	Select the condition used by the criteria. The options are Contains, Does Not Contain, Does Not Equal, Equals, Is Empty, Is Not Empty, Starts With.
Value	Enter the value used by the criteria. Leave this field blank if you are using the condition Is Empty or Is Not Empty.
Read Only	Read-only is selected, because this argument is read-only on the dealer side. Only the host can specify a criteria, and the dealers cannot change the value of this criteria.

Adding Actions for Dealer Business Rules

After adding the criteria for the business rule, you select the action that will be performed if the criteria are satisfied.

You can also add multiple actions. For example, if you want to send a letter to all of your customers whose hobby is sailing, and you also want a sales representative to contact these customers, you add two actions: sending a letter and adding an activity for the sales representative.

This task is a step in *Process of Creating Business Rule Templates for Dealers*.

To add actions for a business rule

1. Navigate to the Administration - Business Rules screen.
2. Click Business Rule Templates.
3. Click the template name of the business rule template you want to add an action for, and click the Actions view tab.
4. Add one or more new records to the Action list and complete the necessary fields, as described in the following table.

Field	Comments
Action	Select the action.
Description	Displays the description that was entered for the Action Type.

Publishing Dealer Business Rules

After you have finished creating and activating a business rule, you publish it to make it available to your dealers.

This task is a step in *Process of Creating Business Rule Templates for Dealers*.

To publish a business rule template

1. Navigate to the Administration - Business Rules screen.
2. Click Business Rule Templates.
3. In the record for the business rule template you want to publish, select the Published check box.

Creating Business Rules That Apply to All Dealers

You can also create business rules that automatically apply to all dealers, whether or not they subscribe to them. The topic *Process of Creating Business Rule Templates for Dealers* discussed how to create business rules that dealers have the option of subscribing to and using.

To create business rules that apply to all dealers

1. Create the business rule in the usual way, as described in *Process of Creating Business Rule Templates for Dealers*.
2. Navigate to the Business Rules Subscription screen.
3. In the Show drop-down list, select All Business Rules Across Organizations.
4. In the Business Rules list, select the business rule that will apply to all dealers.
5. In the Business Rule form, select the All Organizations check box.

Setting the Time When Dealer Business Rules Execute

The OEM can specify the time of day when business rules execute, depending on the load on its computer.

Dealers cannot specify the time of day when rules execute. They can only specify the dates when the rules execute, as described in *Activating Dealer Business Rules (Dealer)*.

1. Navigate to the Business Rules Subscription screen.
2. In the Show drop-down list, select All Business Rules Across Organizations.
3. In the Business Rules list, select a business rule.
4. In the Business Rule form, enter a date and time in the Start Date-Time field.

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Viewing, Deactivating, and Reactivating Subscriptions to Dealer Business Rules

If dealers want to use the business rule templates you have created, they subscribe to the business rule templates, creating individual business rules for each dealer. You can view the dealers who have subscribed to a business rule template, and you can inactivate any one of these subscriptions or all subscriptions. For example, you can inactivate all subscriptions to a rule if you are modifying that rule, so dealers do not use it while it is under construction.

After you have finished working on them, you can reactivate the rules. You must reactivate each rule individually.

To view and inactivate subscriptions to business rules

1. Navigate to the Administration - Business Rules screen.
2. In the link bar, click Business Rule Templates.
3. Click the template name of a business rule template.
4. Click the Subscriptions view tab.
5. In the Subscriptions list, from the menu, select Inactivate All Business Rules.

   All subscriptions to that business rule template are inactivated.

You might want to reactivate a business rule subscription.

To reactivate a business rule subscription

1. Navigate to the Business Rules Subscription screen.
2. In the link bar, click Business Rules.
3. In the Business Rules list, select a business rule.
4. Click Activate.

Viewing Executions of Dealer Business Rules

You can view a list of all the times that dealers have executed a business rule, including the date and time that each execution started and ended and the current status of each execution.

To view executions of business rules

1. Navigate to the Administration - Business Rules screen.
2. Click Business Rule Templates.
3. Click the template name of the business rule template you want to add criteria for, and click the Executions view tab.

   A list of all executions of that business rule template appears.

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Subscribing to Dealer Business Rules (Dealer)

Dealers can use Siebel Dealer to subscribe to business rule templates that the OEM has defined and published, thereby creating their own business rules based on the templates. Dealers must subscribe to rules before they can use the rules.

To subscribe to a business rule

1. Navigate to the Business Rule Subscriptions screen.
2. Click Show Available Templates.
3. In the Business Rule Templates list, select the business rule you want to subscribe to.
4. Click Subscribe.

    Note: If a dealer has already subscribed to a template, then clicking Subscribe will navigate the dealer to the existing subscription to that template. It will not create a new version of the subscription, and it will not update the existing subscription with changes that might have occurred in the template.

Changing the Parameters of Dealer Business Rules (Dealer)

When the OEM creates business rule templates, the OEM creates default parameters for each template. For example, if a business rule sends form letters, the default parameters could be the form letter template and the fulfillment house.

Dealers can change these parameters to customize the rule for their own use. The OEM specifies the criteria in the template and the action arguments in the action, and dealers cannot add or remove criteria or actions. Dealers can change the values of the parameters, except for read-only parameters. If the dealer specifies an invalid value for a field, then execution will fail.

Dealers can also deactivate one or more actions for a given rule and leave the others active, to customize the rule so it only executes that actions that they want to use.

To change the parameters of a business rule

1. Navigate to the Business Rule Subscriptions screen.

    This view lists all business rules that the dealer has subscribed to.
2. In the Business Rules list, click the name of the business rule whose parameters you want to change.
3. Click the Actions view tab.
4. Select an Action.

    Dealers cannot modify these actions. They can only deactivate actions or change their parameters.
5. To deactivate the action, deselect the Active check box in the Action record.
6. To modify the parameters for the action, in the Arguments list for the action, choose different parameters.

Activating Dealer Business Rules (Dealer)

After a dealer activates a rule, it will execute automatically in the background at the times the OEM specified, and it will perform the actions for each record that satisfies the criteria.

Dealers activate rules by setting their start and end date.

To activate a business rule

1. Navigate to the Business Rule Subscriptions screen.

   This view lists all business rules that the dealer has subscribed to.
2. In the Business Rules list, select the record for the business rule you want to activate.
3. In the Business Rule form, enter values in the Start Date and End Date field to specify when this rule will be active.

   If you do not enter a value in the End Date field, the rule remains active indefinitely after the start date.

Viewing Executions of Dealer Business Rules (Dealer)

Dealers can view the history of all the times they have executed a business rule.

To view the execution history of a business rule

1. Navigate to the Business Rules view of Business Rule Subscriptions screen.

   This view lists all business rules that the dealer has subscribed to.
2. In the Business Rules list, select the business rule whose execution history you want to view.
3. Click the Executions view tab.

   A list of all executions of the business rule appears.

Configuration for Dealer Business Rules

This topic gives a high-level overview of the steps needed to allow the Business Rules Engine to process different types of entities. It is important to understand the use of Siebel Tools before you try to do this. For more information about Siebel Tools, see *Using Siebel Tools* .

Before configuration, the Business Rules Engine includes workflows to support rules based on certain entities (such as Contacts and Sales History) and actions (such as Create Activity and Send Letter). For a summary of the entities and actions supported before configuration, see *Creating New Actions for Dealer Business Rules*.

To allow business rules to support other entities, go through the following steps:

- *Gathering Information*

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- *Enabling the Object for Business Rules*

- *Defining Business Rules*

Note: The Business Rules module can be used by any Siebel industry application. You can use this configuration to allow it to support entities needed by other industries.

Gathering Information

Before you begin, you must have all of the following information:

- Identify the Business Object (Subject Entity/Object).

- Identify the Primary BC of the Business Object.

- Identify the Workflow/Business service that performs the actions (Action Types).

- Identify the BC Fields on which the Subject Entity can be queried (Criteria).

- Identify if Organization Visibility is required and if it is configured on the Primary BC.

Enabling the Object for Business Rules

To enable the object for business rules, perform the following procedures.

This topic explains how to create seed data to enable an object for business rules.

To create seed data to enable the object for business rules

1. Navigate to the List of Values view of the Application Administration screen.
2. Query in the Type field for the value EAUTO_BUS_RULE_OBJECT.
3. Copy one of the records with this value in the Type field.
4. In the new record:

   o Change the value in the LIC (Language Independent Code) field to the business object name.

   o Change the value in the Display Name field to an appropriate value.

This topic explains how to create seed data to enable an object for the query assistant.

To create seed data to enable the object for query assistant

1. Navigate to the List of Values view of the Application Administration screen.
2. Query in the Type field for the value EAUTO_QUERY_BUSCOMP.
3. Copy one of the records with this value in the Type field.
4. In the new record:

   o Change the value in the LIC field to the business object of the subject entity.

   o Change the value in the Display Name field to an appropriate value.

5. Define a new LOV Type with the name QRY_FLD_xxxx where xxxx identifies the Entity.

   For example, if the entity is Order, the new LOV Type would be QRY_FLD_ORDER.

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6. For each field that needs to be queried on, create a new LOV record of this new type. In the new record:

    o In the LIC field, enter the BC field name.

    o In the Display Name field, enter an appropriate value that will be displayed to the user.

This topic explains how to perform configuration to enable objects for query assistant.

To perform configuration to enable the object for query assistant

1. In Oracle's Siebel Tools, display Business Components.
2. Query for eAuto Query and eAuto Query Condition.
3. For each of these Business Components:

    o Query for BC User Properties named Query BC Field LOV*.

    o Create a new user property with the following values:

        - Name: Query BC Field LOV xx
        - Value: *primary_bc_name_above, qry_fld_lov_type_created_above*
4. Include the Primary BC (without any link) in the following Business Objects:

    o eAuto Business Rule Template

    o eAuto Business Rule

Defining Business Rules

To define the business rules, perform the following procedures.

To define action types

1. Navigate to the Action Types view of the Administration - Business Rules screen.
2. Create a New Action Type Record.

    a. In the Mode field, select the appropriate value.
    b. In the Type field, select Workflow or Business Service.
    c. If you selected Workflow, specify the Workflow. If you selected Business Service, specify the Business Service, Method and Id Field.
3. In the Arguments Applet:

    a. Create a new record for each Argument that needs to be passed, and specify the required values.
    b. Depending on the type of the Argument, specify the Pick List, Pick Applet and Pick Field fields if required.

This topic explains how to define the business rule template.

To define the business rule template

1. Navigate to the Business Rule Templates view of the Administration - Business Rules screen.
2. Create a New Business Rule Template for the object you specified earlier.
3. In the Actions applet, add an Action record and specify arguments.
4. In the Criteria applet, specify criteria fields and values for them.

5. Select the Publish check box to publish the template.
6. Navigate to the All Business Rules view of the Business Rules Subscription screen.
7. Click Show Available Templates.
8. Select the template you defined and click Subscribe.
9. Activate the Rule.

7 Managing Warranty Claims

Managing Warranty Claims

This chapter describes the processes and procedures that dealers use to manage warranty claims, prewarranty authorizations, and work orders. It covers the following topics:

- *About Warranty Claims Management*
- *Overview of Warranty Claims Management*
- *Scenario for Processing a Warranty Claim*
- *Roadmap for Creating and Managing Warranty Claims*
- *Verifying Warranty Entitlement and Coverage*
- *Process of Creating a Prewarranty Authorization*
- *Process of Creating a Work Order*
- *Process of Creating a Warranty Claim*
- *Roadmap for Creating a Work Order from a PWA*
- *Creating a PWA and Warranty Claim from a Work Order*
- *Creating a Warranty Claim from a Work Order (without a PWA)*
- *Updating a Warranty Claim*
- *About Supplier Recovery Claims*
- *Process of Reviewing and Submitting Decisions for Supplier Recovery Claims*

About Warranty Claims Management

Manufacturers and dealers must balance profitability against costs and comply with industry and government standards and guidelines. Manufacturers and dealers have to implement some level of control by managing warranty claims. By managing warranty claims, it enables dealers to do the following:

- Create prewarranty authorizations.
- Create warranty claims.
- Create work orders.
- Create prewarranty authorizations and warranty claims from work orders.
- Create work orders from a prewarranty authorization.
- Create warranty claims from a work order without a prewarranty authorization.
- Create a warranty claim without a prewarranty authorization or work order.
- Enter line item details for prewarranty authorizations, warranty claims, and work orders.
- Verify entitlement of warranty coverage.
- Update a warranty claim.

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- Submit prewarranty authorizations and warranty claims for approval.

Warranty claims management is based on processing workflow and validation rules. For more information on verification and claims processing rules, see *About Validation Rules Processing and Exclusions*.

Overview of Warranty Claims Management

Managing warranty claims is critical to the overall administration of warranty programs. It involves verifying asset entitlement, creating and approving claims, prewarranty authorizations and approvals, fulfilling standard and extended warranty work, and managing exclusions and recall campaigns. The basic concepts of warranty claims management are described in the following topics:

- *About Prewarranty Authorizations*
- *About Work Orders*
- *About Warranty Claims*
- *About Warranty Claim Repair Lines*
- *About Validation Rules Processing and Exclusions*
- *About Recalls*
- *About Exclusions*

About Prewarranty Authorizations

The prewarranty authorization (PWA) is a request that is completed by a dealer, which records the work that must be completed by the dealer. It is used to obtain approval from the manufacturer prior to conducting the work. For example, the asset might have been damaged during transit and requires fixing before the asset can be delivered to the customer.

When you create a PWA, it is assigned a unique reference number and is linked to the asset number, dealer, line items, and cost estimates. Each PWA can have multiple line items for each authorization. After you enter all of the details for a PWA, it is processed using the verification and claims processing rules. If all of the lines in the PWA meet the acceptable criteria, it is approved and authorization.

In addition to being able to create a PWA directly in Siebel Dealer, you can also use a third-party application using Web services. For more information on Web services, see *Siebel Automotive Guide* .

> **Note:** You can link only one work order to a PWA.

After a PWA is approved, you can create a warranty claim and link the PWA to it from either Siebel Dealer or through Web services.

PWA Claim Types

When you create a PWA, you must specify the claim type for each PWA line item. A single PWA might consist of any of the following claim types.

Extended

The *extended* warranty PWA type provides more coverage for an asset than a standard warranty. The customer buys it to provide additional coverage.

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Good Will

The *good will* claim type is used by dealers and manufacturers to provide coverage on a case-by-case basis for repairs that are not covered under the product warranty (for example, expired warranty or not covered) and are performed as a courtesy to promote customer retention or loyalty. This type of claim is processed outside of the normal workflow and is sent directly to the manufacturer for approval.

PDI

The *predelivery inspection (PDI)* claim type is used to cover work that is performed prior to the asset being delivered to the customer. During a PDI, any problem identified with the asset is addressed and a warranty claim is submitted using the PDI type.

> **Note:** While a PWA is not required, you can create a PWA from the PDI claim type, if necessary.

Parts Warranty

In many cases, the individual parts of an asset are covered under separate warranties and if the part fails, it might be covered under the parts warranty instead of the warranty for the asset. For example, a customer purchases a laptop, which is covered by a 12-month standard warranty, and the battery fails during the coverage period. The battery is covered under a separate warranty for 24 months. The claim is filed against the warranty for the failed part. *Parts warranty* claims are used to classify parts that were purchased or replaced after the asset was purchased.

> **Note:** If a part is sold through a Siebel application and if the sale details (for example, the sold date) are captured in the Siebel application, the part details for the asset will be available for viewing.

Product Update Campaign

The *product update campaign* claim type identifies assets that require product repair or replacement. For example, after the production and delivery of a product, if it is determined that a problem exists with a major component, which presents a safety hazard, then the manufacturer issues a product update campaign and all affected assets are eligible for repair and replacement.

> **Note:** While a PWA is not required, you can create a PWA from the product update campaign claim type, if necessary.

Recall

The *recall* claim type identifies the repair work that is being performed as a result of a product recall.

> **Note:** Recall notifications are started outside of Siebel Dealer. While a PWA is not required, you can create a PWA from the recall claim type, if necessary.

Standard Warranty

The *standard warranty* claim type is used to represent the standard manufacturer coverage for the product. The warranty is a written promise that the product is free from defect and further promises that the product meets a specified service or performance level for a stated period. If the product fails during this period, then the standard warranty claim provides protection to the consumer against defective workmanship or parts and typically covers repair and replacement.

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Transportation Warranty

The *transportation warranty* claim type is similar to a PDI or prewarranty authorization. The notable difference is that the transportation warranty claim type is used by a dealer to submit a claim for damage that occurred to an asset during transit.

> **Note:** While a PWA is not required, you can create a PWA from the transportation claim type, if necessary.

PWA Statuses

With each action performed throughout the life cycle of a PWA, the status changes to reflect the current state. The following table shows the various statuses of a PWA.

Status	Description
Draft	All lines in the PWA are in draft status.
Approved	An approved status of a PWA occurs when all lines or at least one line in the PWA is approved and the remainder are rejected.
Rejected	All lines in the PWA are in a rejected status or at least one line is in the rejected status and remaining lines are in rejected status.
Approval In Progress	At least one line is in one of the following statuses: office referral, field referral, or clarification required.

PWA Repair Line Statuses

The repair lines in a PWA are used to record the details of the prewarranty work required, which includes items, such as operation codes, causal part number, policy identification, amount requested, and whether the repair is being performed by a third-party or being sublet. The following table shows the various PWA repair line statuses.

Status	Description
Draft	When the repair line has been created and has yet to be submitted.
Office Referral	The repair line has been referred to the claims processing office representative for manual review.
Approved	The repair line has been approved by the manufacturer.
Rejected	The repair line has been rejected by the manufacturer.

About Work Orders

Work orders are used to capture the detail for the work to be performed by the technician. After a work order is created, prior to starting any repair, the service advisor collects the necessary warranty information and discusses the repair details with the customer. When a customer agrees to the repairs, the work order is assigned to the appropriate technician. After the technician completes the repair, he updates the work order with the labor and parts used to complete the task. The work order is then closed and the customer is charged for the portion for which the customer is responsible. The work order is sent to the manufacturer as a warranty claim for reimbursement. The warranty claim is then approved and processed for payment or sent for additional review by the claims manager.

> **Note:** You can create a warranty claim from a work order. You can perform this action directly in Siebel Dealer or through a third-party application using Web services. For more information on Web services, see *Siebel Automotive Guide* .

About Warranty Claims

A warranty claim is a multitier collaborative process that spans customers, dealers, service providers, manufacturers, and suppliers. Siebel Dealer enables manufacturers, dealers, and suppliers to enter warranty claims and manage the warranty process from claim creation through reimbursement.

> **Note:** Additionally, warranty claims might also be imported using Web service integration.

Warranty Claim Types

When you create a warranty claim, you must specify the claim type for each line of the claim. A warranty claim might consist of any of the following claim types for each line of the claim. Warranty claim types include:

Extended

The *extended* warranty claim type provides more asset coverage than the standard warranty. The customer buys it to provide additional coverage.

Good Will

The *good will* warranty claim type is used by dealers and manufacturers to provide coverage on a case-by-case basis for repairs that are not covered under the product warranty (for example, expired warranty or not covered) and are performed as a courtesy to promote customer retention or loyalty. This type of claim is processed outside of the normal workflow and is sent directly to the manufacturer for approval.

Predelivery Inspection

The *predelivery inspection* (PDI) warranty claim type is used to cover work that is performed prior to the asset being delivered to the customer. During a PDI, any problem identified with the asset is addressed and a warranty claim is submitted using the PDI type.

> **Note:** A PWA is not required for PDI claims.

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Parts Warranty

In some instances, individual parts of an asset might carry a warranty that is separate from the standard warranty. For example, the standard warranty for a vehicle is 36 months or 36,000 miles, but the powertrain is covered under a 60-month warranty or 60,000-mile warranty. *Parts warranty* claims are used to classify parts that were purchased or replaced after the asset was purchased.

Note: If a part is sold through a Siebel application and if the sale details (for example, the sold date) are captured in the Siebel application, the part details for the asset will be available for viewing.

Product Update Campaign

The *product update campaign* warranty claim type is used to identify assets that require product repair or replacement. For example, after production and delivery of a vehicle, if it is determined that there is a problem with the window regulator, then the manufacturer issues a product update campaign and the affected assets become eligible for repair and replacement.

Note: A PWA authorization is not required for product update campaign claims.

Recall

The *recall* warranty claim type is used to identify repair work that is being performed as a result of a product recall.

Note: Recall notifications are started outside of Siebel Dealer. A PWA is not required for recall claims.

Standard

The *standard* warranty claim type is used to represent the standard manufacturer coverage for the product. The warranty is a written promise that product is free from defect and further promises that the product meets a specified service or performance level for a stated period. If the product fails during this period, the standard warranty claim provides protection to the consumer against defective workmanship or parts and typically covers repair and replacement.

Transportation

The *transportation* warranty claim type is similar to a PDI prewarranty authorization, but it is used by a dealer to submit a claim for damage that occurred to an asset during transit.

Note: A PWA is not required for transportation claims.

Warranty Claim Statuses

With each action performed throughout the life cycle of a warranty claim, the status changes to reflect its current state. The following table shows the various statuses of a warranty claim.

Status	Description
Draft	All lines in the warranty claim are in draft status.

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Status	Description
Approved	All lines in the warranty claim are in approved status or at least one line is approved and the remaining lines are rejected or canceled.
Rejected	All lines in the warranty claim are in a rejected status or at least one line is in the rejected status and the remaining lines are in rejected status.
Approval In Progress	At least one line is in one of the following statuses: office referral, field referral, or clarification required.
Payment Request Sent	The Warranty Payment module has sent the payment request to financial.

About Warranty Claim Repair Lines

The repair lines in a warranty claim are used to capture all of the details of the claim, such as operation codes, replacement parts, exclusions, and if applicable, third-party sublet information. For more information on exclusions, see *Siebel Automotive Guide* .

Warranty Claim Repair Line Statuses

The following table shows the various repair line statuses of a warranty claim.

Status	Description
Draft	When the repair line has been created and has yet to be submitted.
Office Referral	The repair line has been referred to the claims processing office representative for manual review.
Field Referral	The repair line has been referred to the field assessor for review.
Clarification Needed	The manufacturer approving agent has requested more information for the repair line or the repair line requires correction.
Approved	The repair line has been approved by the manufacturer.
Rejected	The repair line has been rejected by the manufacturer.

About Validation Rules Processing and Exclusions

Validation and processing rules control the automatic approval of claims. Claims that deviate from the workflow rules or require additional review are routed to the appropriate person for manual approval.

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Rules

The predetermined processing rules in Siebel Dealer control how claims are handled when they are being processed. Various factors are considered in the processing, some of which include:

- Claim status
- Claim type
- Claim amount

For more information about rules, see *Siebel Automotive Guide* .

Exclusions

In some instances, manual approval might be the result of an excluded item in the warranty coverage. A claim requires manual approval if the asset has been modified. For example, if the engine of a passenger vehicle was modified for performance racing, then it is routed to the appropriate person for manual approval instead of being processed automatically. The alteration constitutes a modification and thereby changes the warranty coverage. During the establishment of warranty programs, certain exclusions are defined to protect the manufacturer from liability of altered or improperly maintained products. Some of the exclusions include the following:

- Neglect, misuse, or abuse
- Environmental causes (for example, rust, corrosion or acts of nature)
- Damage or failure caused by aftermarket parts or equipment
- Failure to perform the manufacturer's suggested maintenance
- Odometer alteration

For more information on claim approvals and exclusions, see *Siebel Automotive Guide* .

About Recalls

Manufacturers recall campaigns when it is determined that a quality issue is present in an asset that is in production and has been sold, distributed, and is being widely used. When this occurs, the manufacturer identifies all of the asset serial numbers that are affected and starts a recall campaign. Consumers are notified of the recall and are advised to take the asset to a service center for inspection and possible repair. Upon performing the repair, the service center creates and submits a claim to the manufacturer to recoup its costs; that is, parts and labor. You must assign the recall claim type to the claim line in the warranty claim that you create.

Note: Recall notifications are started outside of Siebel Dealer. A PWA is not required for recall claims.

About Exclusions

Often during the standard warranty period of an asset, the consumer might modify the asset, altering the manufacturer's standard specifications. When an asset is modified, it typically voids the manufacturer's standard warranty, and the asset is no longer covered under the warranty. The exclusion identifier enables you to keep track of these conditions to prevent claims from being submitted fraudulently.

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Scenario for Processing a Warranty Claim

This scenario provides an example of the workflow of a warranty claim, from the creation of the work order to submission and then payment. Your business processes might differ from the following scenario, depending on your business model.

During a typical day in an automotive dealership, customers contact dealers about issues they are experiencing with their vehicle. The service advisor determines whether the asset and if applicable, the failed parts are covered under warranty. After verifying the warranty entitlement, the service advisor creates a work order and provides the customer with the repair details, including information about the warranty agreement and the responsibility of the customer.

In some instances, a service advisor might want to obtain preauthorization. The service advisor creates a prewarranty authorization before conducting any repair work. After receiving the necessary preauthorizations, the service advisor discusses the extent of the work order with the customer. If the customer agrees to the terms, the service advisor assigns the work order to a technician. The technician performs the repair work, including the replacement of the parts under warranty and updates the work order to reflect the parts used and the labor required.

If applicable, the customer pays her portion of the repair and the vehicle is returned to her. The service advisor closes the work order and submits it to the manufacturer for reimbursement. The work order is validated against the validation processing rules and if all aspects of the work order comply with the processing rules, the work order is automatically approved. If the work order cannot be approved automatically, then it is routed to the claims manager for review and manual approval.

When a part fails and must be returned to the manufacturer, it is marked as defective. If the failed part is listed on a repair line in the warranty claim, then the part is listed as a returned part. The claims manager can create a return material authorization (RMA) to be sent to the manufacturer. Upon receipt of the failed part, the part is inspected and the parts inspector updates the RMA. After the RMA status is updated, payment to the dealership is then started.

Roadmap for Creating and Managing Warranty Claims

The life cycle of a warranty claim for an asset consists of the many life cycles and actions.

To create and manage warranty claims, perform the following tasks and processes:

1. *Verifying Warranty Entitlement and Coverage*.
2. *Process of Creating a Prewarranty Authorization*.
3. *Process of Creating a Work Order*.
4. *Process of Creating a Warranty Claim*.
5. *Updating a Warranty Claim*.

The following image shows the workflow for warranty claims. The vertical division represents the entities that are performing actions at different points in the cycle. These entities and their actions include the following:

- **Supplier:** Validate supplier claim, Make a payment.

- **OEM:** Define terms for warranties and set up base data, Validate warranty entitlement for the product issue, Validate and process claim, Create supplier claim, Create credit memo (servicing organization), Create debit memo (supplier).

- **Channel partner or service organization:** Sell products with warranty, Preview product issue, Provide service quote, Perform service on asset, Create warranty claim, Receive payment.

- **Customer:** Register asset for warranty, Customer calls with product issues, Accept service quote.

Arrows indicate the flow of information that triggers different actions. Some of the actions include the following:

- Verifying the coverage of the asset policy
- Creating and approving prewarranty authorizations
- Creating work orders
- Creating and approving claims

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Supplier	OEM	Channel Partner or Service Organization	Customer

Oracle Warranty Management Events

External Events
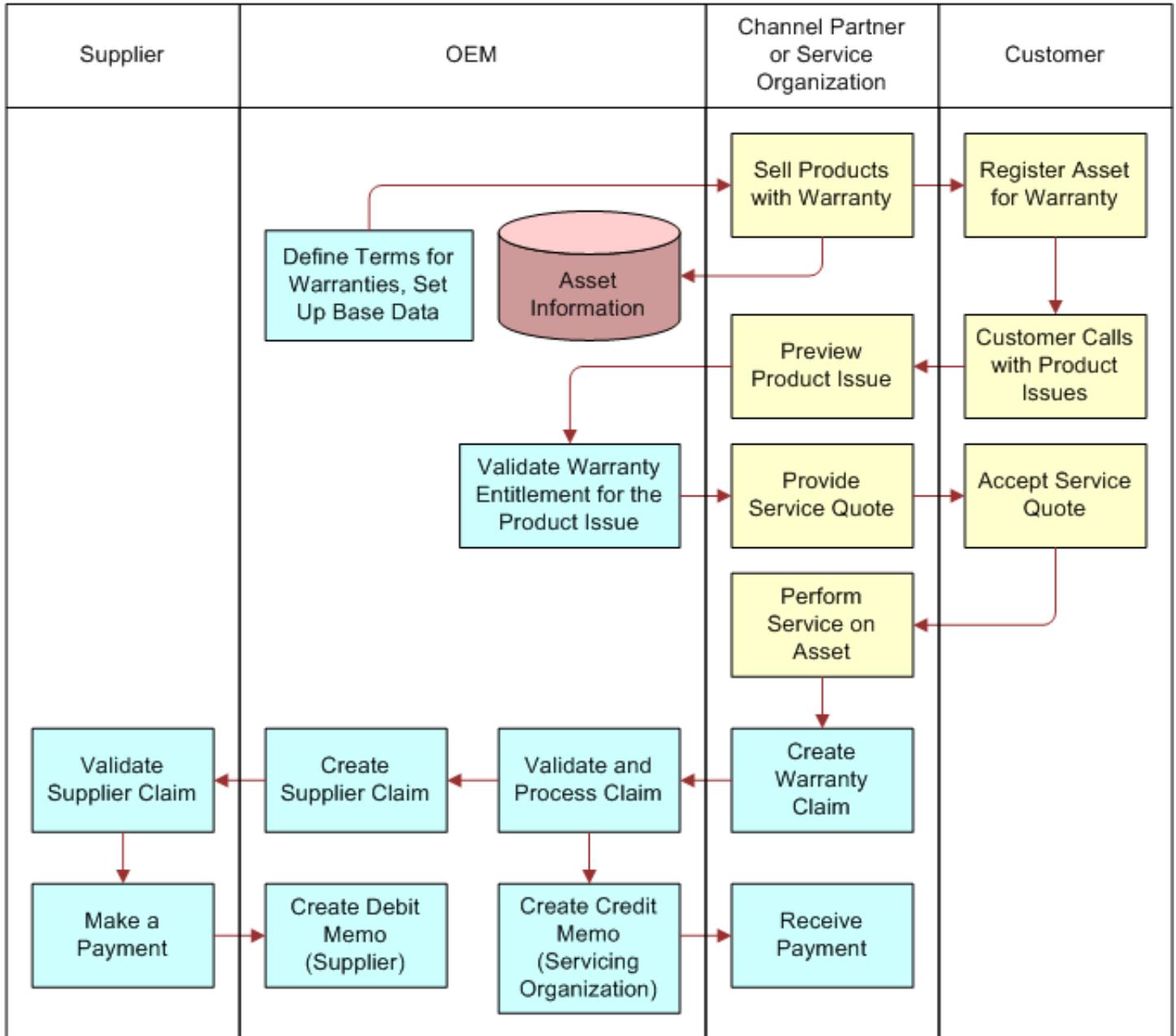
Workfow Description

The following indicates the workflow for managing warranty claims:

1. *OEM.* Define terms for warranties and set up base data.
2. *Channel Partner or Service Organization.*Sell Products with Warranty
3. *Customer.* Register asset for warranty.

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4. *Customer.* Customer calls with product issues.
5. *Channel Partner or Service Organization.* Preview product issue.
6. *OEM.* Validate warranty entitlement for the product issue.
7. *Channel Partner or Service Organization.* Provide service quote.
8. *Customer.* Accept service quote.
9. *Channel Partner or Service Organization.* Perform service on asset.
10. *Channel Partner or Service Organization.* Create warranty claim.
11. *OEM.* Validate and process claim.

   - *OEM.* Create credit memo (servicing organization).

   - *Channel Partner or Service Organization.* Receive payment.

12. *OEM.* Validate and process claim.

   - *OEM.* Create supplier claim.

   - *Supplier.* Validate supplier claim.

   - *Supplier.* Make a payment.

   - *OEM.* Create debit memo (supplier).

Note: All Customer actions and all Channel Partner or Service Organization actions (bar Create warranty claim and Recieve payment) are external events.

Verifying Warranty Entitlement and Coverage

When a customer reports a problem with an asset to a dealer or service provider, before any work can commence, the dealer or service provider must obtain information about the warranty coverage for the asset. If warranty coverage exists, the dealer or service provider can proceed with performing the necessary work.

This task is a step in *Roadmap for Creating and Managing Warranty Claims*.

To verify warranty entitlement and coverage

1. Navigate to the Administration - Service screen, and then Warranty Policies.
2. Select the asset serial number.

   The details of the warranty coverage for the asset appear and include: the status, policy number, and start and end dates.

Process of Creating a Prewarranty Authorization

To create and submit a prewarranty authorization, perform the following tasks:

1. *Creating a Prewarranty Authorization*
2. *Entering PWA Line Items*
3. *Submitting a Prewarranty Authorization for Approval*

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This process is a step in *Roadmap for Creating and Managing Warranty Claims*.

Creating a Prewarranty Authorization

Prior to performing any work on an asset, the dealer must obtain preapproval from the manufacturer. The dealer or supplier must create and submit the PWA to the manufacturer, outlining the extent of the work to be performed, to include all line items, applicable operation codes, and estimated cost and link the PWA to the warranty claim. Prewarranty authorizations are displayed to the user in ascending order by the prewarranty authorization number.

This task is a step in *Process of Creating a Prewarranty Authorization*.

To create a prewarranty authorization

1. Navigate to the Warranty Claims screen, then PWA List view.
2. In the PWA List, click New to add a prewarranty authorization claim.

   Siebel Dealer creates a prewarranty authorization claim and automatically assigns a number.

   A new PWA record is created, and a PWA number is assigned automatically. The Partner Name field is a read-only field. It displays the name of the dealer who is logged in to Siebel Dealer.

   The partner identification code automatically populates the Partner ID field.
3. In the Asset Serial Number field, select Product.
4. Select the asset number, and click OK.
5. In the Usage field, enter the measure of usage. For example, if the asset is a passenger vehicle, enter the mileage, using the odometer reading.
6. Select a unit of measure from the Usage UOM drop-down list.
7. Select the PWA number.

   The PWA Entry Details form appears.
8. In the PWA Entry Details form, provide the information described in the following table.

Field	Description
Customer Type	Select the customer type from the drop-down list. You can choose either Retail or Fleet.
Contact	Type the name of the individual who is responsible for the asset and who will be the contact for the manufacturer if there are questions about the asset or the PWA.
Comments	Enter any notes or special instruction pertaining to the asset.
Injury	Select this check box if an injury was associated with the asset.
Property Damage	Select this check box if property damage was associated with the asset.
Death	Select this check box if a loss of life occurred.

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9. Additionally, you can enter the information described in the following table.

Field	Description
External Reference ID	The External Reference ID field is used to cross-reference the PWA with information created in an external application.
Work Order Number	This field is used to cross-reference the work order with the PWA.
Visiting Owner	Choose this option when you want to indicate that the servicing dealer is other than the selling dealer.

Entering PWA Line Items

Prior to conducting any warranty repair work for any part that has failed during the warranty period, the dealer must seek prior approval from the manufacturer in order to perform the necessary repair work. A warranty claim in the form of a prewarranty authorization (PWA) is submitted to the manufacturer. After the dealer enters the criteria for the PWA, it is submitted to the manufacturer for review and approval. You can enter multiple line items for each PWA.

This task is a step in *Process of Creating a Prewarranty Authorization*.

To enter PWA line items

1. Navigate to the Warranty Claims screen.
2. Select PWA List, and then a PWA number.
3. From the PWA Line Item List form, click New.
4. Enter the details for the PWA as described in the following table.

Field	Description
Operation Code	Enter the operation code for the PWA line item.
Causal Part Number	Enter the part number for the failed part.
Sublet	Select this option if the repair of the asset will be carried out by a third-party vendor.
Claim Type	Enter the type of claim for which the PWA is being created. You can choose from: o Extended o Good Will o PDI o Parts Warranty

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Field	Description
	○ Product Update Campaign
	○ Recall
	○ Standard
	○ Transportation
Policy Number	Enter the policy number against the repair that is being claimed. **Note:** The warranty policy number can be entered only if the Claim Type is Standard or Extended.

5. Click Verify.

   Note: If the claim type is standard or extended, a policy must be specified for the PWA.

6. In the PWA Line Details form, enter the details for the line items for the PWA as described in the following table.

Field	Description
Work Order Line	If you entered the work order number when you created the PWA, the data from the PWA line item will be transferred to the work order line item. **Note:** The Work Order Line is an optional field.
Force Office Referral	Select this check box if you want to send the PWA line item for manual review. After it is submitted, the status changes to Office Referral.
Trouble Code	Select the trouble code for the claim line that represents the problem that is being reported, repaired, or replaced. For example, a passenger window cannot be raised or lowered. **Note:** Trouble codes are linked to fault codes. Multiple trouble codes might be linked to a fault code or conversely, more than one fault code might be linked to a trouble code.
Fault Code	Select the fault code for the claim line that represents the cause of the problem that is being reported, repaired, or replaced. For example, a window regulator is defective. **Note:** Fault codes are linked to trouble codes and repair operation codes. Multiple fault codes might be linked to a repair operation code or conversely, more than one repair operation code might be linked to a fault code.
Condition	Describe the condition of the problem.

Field	Description
Cause	The content in this field automatically displays the description defined for the fault code. You can enter additional text to describe the reason for the damage.
Repair	Describe the necessary repair to correct the damaged item.

7. In the PWA Line Estimate form, enter the estimate for the repair work as described in the following table.

Field	Description
Total Labor	Enter the dollar amount for the labor needed to perform the repair work. Enter the percentage of the labor amount that represents the customer's percentage of the financial responsibility.
Total Parts	Enter the dollar amount for the parts that are needed to perform the repair work. Enter the percentage of the parts dollar amount that represents the customer's percentage of the financial responsibility.

Submitting a Prewarranty Authorization for Approval

After creating the prewarranty authorization, enter the line item details, and verify the entries, the prewarranty is ready to be submitted to the manufacturer for approval.

Note: If the prewarranty authorization cannot be processed for approval against the validation and processing rules, the prewarranty authorization is routed to the appropriate reviewer for manual approval. Some claims by nature must always be approved manually, which include claims for which the claim type is *good will* and those for which the claim amount exceeds the predetermined dollar threshold.

This task is a step in *Process of Creating a Prewarranty Authorization*.

To submit a prewarranty authorization for approval

1. Navigate to the Warranty Claims screen.
2. Select PWA List, and then a PWA number.
3. Verify the information that you entered for the prewarranty authorization.
4. Click Submit.

   The status of the prewarranty authorization changes from *draft* to *approval in progress*.

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Process of Creating a Work Order

To create and submit a work order, perform the following tasks:

1. *Creating a Work Order*
2. *Entering Work Order Line Items*

This process is a step in *Roadmap for Creating and Managing Warranty Claims*.

Creating a Work Order

Work orders are used to capture the detail for the actual work to be performed by the technician for the asset. After a work order is created and prior to starting any repair, the service advisor collects the necessary warranty information and discusses the repair details with the customer. Upon customer agreement to the repairs, the work order is assigned to the appropriate technician. After the technician completes the repair, he updates the work order with the actual labor and parts used to complete the task. The work order is then closed, and the customer is charged for the customer's portion of the work. The work order is sent to the manufacturer as a warranty claim for reimbursement. The warranty claim is then approved and processed for payment or sent to the claims manager for review.

This task is a step in *Process of Creating a Work Order*.

To create a work order

1. Navigate to the Warranty Claims screen, then Work Orders view.
2. In the Work Orders view, click New to add a work order.

   Siebel Dealer creates a new work order and automatically assigns a work order number.
3. In the Asset Serial number field, enter the serial number for the asset.

   The Partner Name field is a read-only field. It displays the name of the dealer who is logged in to Siebel Dealer.
4. In the Work Order form, click in the Usage field, and enter the mileage or operating hours for the asset.
5. Select a unit of measure from the Usage UOM drop-down list.
6. In the Date Reported field, enter the date when the problem was reported by the customer.
7. Select the work order number.

   The Work Order Entry Details form appears.
8. In the Work Order Entry Details form, provide the information described in the following table.

Field	Description
PWA Number	Enter a PWA number to associate it with the work order.
Usage/Usage (UOM)	Enter the asset usage, for example, miles or operating hours.
Customer Type	Select the customer type from the drop-down list. You can choose either Retail or Fleet.
Account	Select an account for the work order.

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Field	Description
Contact	Type the name of the individual who is responsible for the asset and who will be the contact for the manufacturer if there are questions pertaining to the asset or the work order.
Visiting Owner	Choose this option when you want to indicate that the servicing dealer is other than the selling dealer.
Comments	Enter any notes or special instructions pertaining to the asset and the work order.
Work Order Date	Enter the date for the work order.

Entering Work Order Line Items

Work order line items are used to provide a comprehensive and detailed account of the work to be carried out for the asset. It lists the repair details to include, trouble and fault codes, repair operation codes and rates, sublet work and overall repair costs.

Note: You can add as many lines as needed for the work order.

This task is a step in *Process of Creating a Work Order*.

To enter work order line items

1. Navigate to the Warranty Claims screen, then Work Orders view.
2. Select a work order and then a work order number.

   The Work Order Line Details view tab is displayed.
3. Click New to enter individual lines in the work order.
4. Enter the details for the work order as described in the following table.

Field	Description
Operation Code	Select the repair operation code for the work that will be performed.
Operation Code Description	The field automatically displays the description that has been defined for the repair operation code, after you select a operation code.
Sublet	Select this option if the repair of the asset will be carried out by a third-party vendor.

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Field	Description
PWA Line Number	Optionally, you might link PWA lines with a work order. **Note:** You must enter the PWA number when you create the work order so you can link the PWA lines. You select lines from the PWA number that you cross-referenced in the work order. You can select any PWA number, regardless of its status. Additionally, you can select a PWA line item that is already added to the work order line item. By default, the subassembly, operation code, and causal part values are transferred from the PWA line to the Work Order Entry form.
Claim Type	Enter the type of claim for the asset. You can choose from: ○ Extended ○ Good Will ○ PDI ○ Parts Warranty ○ Product Update Campaign ○ Recall ○ Standard ○ Transportation
Warranty Policy	Select the appropriate policy number for the asset that will be processed for the work order. **Note:** The warranty policy number can be entered only if the Claim Type is Standard or Extended.

5. In the Repair Operation Information area of the Work Order Line Items Detail form, enter the repair values as described in following table.

Field	Description
Trouble Code	Select the trouble code from the available options. The trouble code provides additional detail about the cause of the problem. **Note:** Trouble codes are linked to fault codes. Multiple trouble codes might be linked to a fault code or conversely, more than one fault code might be linked to a trouble code.
Fault Code	Select the fault code from the available options. The fault code is used to provide additional detail about the cause of the problem.

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Field	Description
	Note: Fault codes are linked to trouble codes and repair operation codes. Multiple fault codes might be linked to a repair operation code or conversely, more than one repair operation code might be linked to a fault code.
Causal Part Number	Optionally, you can enter the part number for the part that is the source of the problem.

6. In the Operation Code Details area of the Work Order Line Items Detail form, enter the operational time and repair cost values as described in following table.

Field	Description
Requested Time	Enter the amount of time that is necessary to repair and correct the problem with the asset.
Operation Rate	If the labor rate differs from the rate predefined for the selected partner, you can edit it to reflect the rate required for the repair. **Note:** The operation rate is populated automatically with the labor rate that is defined for the selected partner.

7. In the Repair Line Amounts area of the Work Order Line Items Detail form, the cost for the repair of the asset is calculated and described in following table.

Field	Description
Total Labor	The value in this field represents the total labor expense for the line item in the work order. **Note:** The Total Labor field is read-only. The amount is autopopulated with the calculated amount.
Total Others	The value in this field represents the total of the other expenses for the line item in the work order. **Note:** The Total Others field is read-only. The amount is autopopulated with the calculated amount.
Line Total	The value in this field represents the total expenses for the line item in the work order. **Note:** The Line Total field is read-only. The amount is autopopulated with the calculated amount.

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Field	Description
Total Parts	The value in this field represents the total cost of the parts for the line item in the work order. **Note:** The Total Parts field is read-only. The amount is autopopulated with the calculated amount.
Total Tax	If necessary, enter the amount of the total tax for the line item in the work order.

8. In the Others and Sublets area of the Work Order Line Items Detail form, enter the details for the third-party vendor as described in following table.

> **Note:** You can enter third-party vendor information only if you select the Sublet option.

Field	Description
Invoice Number	Enter the third-party invoice number.
Type	Enter the third-party service, for example, air conditioning, adjustment, alignment, or rental.
Requested Amount	Enter the amount that is to be paid to the third-party vendor. **Note:** The amount entered in this field is a manual entry and not a calculated amount.
Description	Describe the work that was performed.

Process of Creating a Warranty Claim

To create and submit a warranty claim, perform the following tasks:

1. *Creating a Warranty Claim*
2. *Entering Warranty Claim Repair Line Items*
3. *Submitting a Warranty Claim for Approval*

This process is a step in *Roadmap for Creating and Managing Warranty Claims*.

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Creating a Warranty Claim

After conducting the repair work on an asset, the dealer or service provider creates a claim to document the details of the work performed in preparation for submitting a claim to the manufacturer.

This task is a step in *Process of Creating a Warranty Claim*.

To create a warranty claim

1. Navigate to the Warranty Claims screen, then Claims List view.
2. In the Claims List view, click New to add a warranty claim.

   Siebel Dealer creates a new warranty claim and automatically assigns a warranty claim number.
3. In the Asset Serial number field, enter the serial number for the asset.

   The Partner Name field is a read-only field. It displays the name of the dealer who is logged in to Siebel Dealer.
4. In the Warranty Claim form, click in the Usage field, and enter the mileage or operating hours for the asset.
5. Select a unit of measure from the Usage UOM drop-down list.
6. In the Date Reported field, enter the date when the problem was reported by the customer.
7. In the Warranty Claim form, select a work order number to link the work order with the warranty claim.

   Note: Asset conditions are populated from the work order by default. Only work orders for the same asset and same partner appear when you perform a lookup.

8. Click Verify.

Entering Warranty Claim Repair Line Items

Each repair performed for an asset under warranty is captured in a warranty claim as a separate line entry. Within each repair line, you must list all or as much of the detail to support the work performed and to process the approval. For example, for each repair line, you must specify the operation code, claim type, policy number, and causal part number.

This task is a step in *Process of Creating a Warranty Claim*.

To enter warranty claim repair line items

1. Navigate to the Warranty Claims screen, then Claims List view.
2. Select a warranty claim number.

   The Claim Entry Details screen appears.
3. In the Line Items view tab, click New to create a repair claim line.

   The Repair Line List screen appears.
4. In the Repair Line List region of the Line Items view tab, enter the details for the repair claim lines as described in the following table.

Field	Description
Work Order Line Number	Select a work order line number.

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Field	Description
Operation Code	Select the repair operation code for the repair work that was performed on the asset. **Note:** Alternately, if you chose a work order line number to associate with the warranty claim, the value in this field is populated automatically to what is defined for the work order line.
Operation Code Description	After you select an operation code, the Operation Code Description field automatically displays the predefined description for the repair operation code by default.
Causal Part Number	Select the causal part number for the part that is the reason for the repair work. **Note:** Alternately, when you choose a work order line number to associate with the warranty claim, the value in this field is autopopulated with the number specified for the work order line.
Sub-Assembly	The subassembly entry that is defined for the operation code is automatically displayed in this field.
Claim Type	Enter the type of claim for the repair line. You can choose from: - Extended - Good Will - PDI - Parts Warranty - Product Update Campaign - Recall - Standard - Transportation **Note:** Alternately, when you chose a work order line number to associate with the warranty claim, the value in this field is autopopulated with the number specified for the work order line.
Policy Number	Enter the policy number for the repair line item. The warranty policy number can be entered only if the Claim Type is Standard or Extended. **Note:** Alternately, if you chose a work order line number to associate with the warranty claim, the value in this field is autopopulated with the number specified for the work order line.

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Field	Description

5. In the Parts region of the Line Items view tab, click New.
6. Enter the details for the replacement parts as described in following table.

Field	Description
Part Name	Enter the replacement part name for the repair line item. **Note:** Alternately, if you chose a work order line number to associate with the warranty claim, the value in this field is autopopulated with the number specified for the work order line.
Part Number	The predefined part number for the selected replacement part is automatically displayed in the field.
Part Serial Number	If a serial number is defined for the replacement part, it is automatically displayed when you select a replacement part name. **Note:** Alternately, if you chose a work order line number to associate with the warranty claim, the value in this field is autopopulated with the number specified for the work order line.
Part Price	Enter the replacement part price. **Note:** Alternately, if you chose a work order line number to associate with the warranty claim, the value in this field is autopopulated with the number specified for the work order line.
Quantity	Enter the quantity of replacement parts used for the repair line item. **Note:** Alternately, if you chose a work order line number to associate with the warranty claim, the value in this field is autopopulated with the number specified for the work order line.
Total Price	The total price of the replacement part is calculated by multiplying the part price by the quantity. **Note:** Alternately, if you chose a work order line number to associate with the warranty claim, the value in this field is autopopulated with the number specified for the work order line.

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Field	Description
RMA Required	Select this field if the return material authorization is required for the replacement part. **Note:** Alternately, if you chose a work order line number to associate with the warranty claim, the value in this field is autopopulated with the number specified for the work order line.

7. In the Line Item Details view tab, enter the repair line details for the claim as described in the following table.

Field	Description
Sublet	Select this option if the repair of the asset will be carried out by a third-party vendor. **Note:** Alternately, if you chose a work order line number to associate with the warranty claim, the value in this field is autopopulated with the number specified for the work order line.
Force Office Referral	Select this check box if you want to send the Warranty Claim line item for manual review. After it is submitted, the status changes to Office Referral.
Part Invoice Number	Enter the invoice number for the part. **Note:** This field is available only in the form.
Part Installed Date	Enter the date on which the part was installed.
Part Installed Mileage	Enter the mileage for the asset when the part was installed.
Fault Code	Select the fault code for the claim line that represents the cause of the problem that is being reported, repaired, or replaced. For example, a window regulator is defective. **Note:** Fault codes are linked to trouble codes and repair operation codes. Multiple fault codes might be linked to a repair operation code or conversely, more than one repair operation code might be linked to a fault code.
Cause	The description associated with the fault code is displayed in this field.
Trouble Code	Select the trouble code for the claim line that represents the problem that is being reported, repaired, or replaced. For example, a passenger window cannot be raised or lowered.

Field	Description
	Note: Trouble codes are linked to fault codes. Multiple trouble codes might be linked to a fault code or conversely, more than one fault code might be linked to a trouble code.
Repair	Describe the repair to the asset.

8. In the Operation Code Details area of the Repair Line Details form, enter the estimate for the repair work as described in the following table.

Field	Description
Requested Time	Enter the number of labor hours required to repair the asset.
Requested Amount	The amount displayed is calculated by multiplying the number of labor hours by the operation rate.

9. In the Others and Sublets area of the Repair Line Details form, enter the details for the third-party vendor as described in following table.

Note: You can enter third-party vendor information only if you selected the Sublet option.

Field	Description
Invoice Number	Enter the third-party invoice number.
Type	Enter the third-party service, for example, air conditioning, adjustment, alignment, or rental.
Requested Amount	Enter the amount that is to be paid to the third-party vendor. **Note:** The amount entered in this field is a manual entry and not a calculated amount.
Approved Amount	The amount that is approved will be displayed in this field.
Description	Describe the work that was performed.

10. In the Repair Line Amounts area of the Repair Line Details form, enter the details for the repair as described in following table.

Field	Description
Labor Amount	Enter the percentage of the repair total for which the customer is responsible, for example, 50 percent.
Total Parts	Enter the percentage of the repair total for which the customer is responsible, for example, 50 percent.

11. Click Verify and then Submit.

Submitting a Warranty Claim for Approval

After you enter all of the details for the warranty claim, the claim must be submitted to the manufacturer for approval.

This task is a step in *Process of Creating a Warranty Claim*.

To submit a warranty claim for approval

1. Navigate to the Warranty Claims screen, then Claims List view.
2. Select a warranty claim number.
3. Verify the details and repair lines that you entered for the warranty claim.
4. Click Submit.

Roadmap for Creating a Work Order from a PWA

To create a work order from a PWA, perform the following tasks:

1. Create a prewarranty authorization.

   For more information, see *Creating a Prewarranty Authorization*.
2. Navigate to the PWA Details view of the prewarranty authorization you created in Step 1.
3. Select Create Work Order.
4. Create the work order.

   For more information, see *Creating a Work Order*.

Creating a PWA and Warranty Claim from a Work Order

You can create a PWA and a warranty claim from a work order.

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To create a PWA and a warranty claim from a work order

1. Navigate to the Warranty Claims screen, then Work Orders view.
2. Drill down on a work order.
3. In the Work Order Details view, select Create PWA.

   The PWA Entry Details view appears for you to enter the PWA details. For more information on creating a PWA, see *Creating a Prewarranty Authorization*.
4. In the Work Order Details view, select Create Claim.

   The Warranty Claim Entry Details view appears for you to enter the warranty claim details. For more information on creating a warranty claim, see *Creating a Warranty Claim*.

Creating a Warranty Claim from a Work Order (without a PWA)

You can create a warranty claim from a work order.

To create a warranty claim from a work order, perform the following tasks:

1. Navigate to the Warranty Claims screen, then Work Orders view.
2. Drill down on a work order.
3. In the Work Order Details view, select Create Claim.

   The Warranty Claim Entry Details view appears for you to enter the warranty claim details. For more information on creating a warranty claim, see *Creating a Warranty Claim*.

Updating a Warranty Claim

Often after a warranty claim is submitted to a manufacturer for approval, the claim might be rejected and returned to the dealer for further clarification or possibly denied. Some reasons for which a warranty claim might be returned include:

- Missing information
- Claim denial
- Claim type

When a claim is returned for further clarification, you can update the line items in the warranty claim to correct the problem and address the reason why the claim was returned. After doing so, you can resubmit the claim for reconsideration. Sometimes it might be necessary to cancel a warranty claim after it has been submitted.

This task is a step in *Roadmap for Creating and Managing Warranty Claims*.

To update a warranty claim

1. Navigate to the Warranty Claims screen and then Claims List view.

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2. Select a warranty claim number.

   The Claim Entry Details screen appears.

3. Click the Line Item Details View tab.

4. Select the repair line that requires updating.

5. Identify the line items for which the claim was returned to you and correct the necessary information.

6. Click Submit.

About Supplier Recovery Claims

Although Original Equipment Manufacturers (OEM) sell final products to customers and offer warranty coverage for the product, the warranty defects might have originated from a third party. For example, a supplier might have manufactured a defective product and might therefore be responsible for a warranty failure. In such cases, the OEM's dealer replaces the failed part under warranty and claims a warranty claim expense from the OEM.

Because the defect originated with the supplier, the OEM wants to recover the warranty claim expense from the supplier, which is a supplier recovery claim. Supplier recovery claims made by OEMs can be evaluated, then accepted or rejected using Siebel Dealer. For information about creating and editing supplier recovery claims, see *Siebel Automotive Guide* .

For information about reviewing and submitting decisions for a supplier recovery claim, see *Process of Reviewing and Submitting Decisions for Supplier Recovery Claims*.

Supplier Recovery Claim Status

This topic describes the values that are assigned to the recovery claim status and provides instructions about listing all of the supplier recovery claims that are pending decisions.

Supplier recovery claims have Claim Status fields that indicate the overall status of the supplier recovery claim. The following table describes the meaning of the statuses for recovery line items

Supplier Recovery Claim Status	Description
Submitted	At least one line item of the supplier recovery claim is set to Submitted, and no line items are set to Rejected.
Approved	All line items of the supplier recovery claim are set to Approved.
Rejected	At least one line item of the supplier recovery claim is set to Rejected.
Payment Request Sent	A payment request has been sent to financial.

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Process of Reviewing and Submitting Decisions for Supplier Recovery Claims

To review and submit decisions for supplier recovery claims, perform the following tasks:

1. *Finding Supplier Recovery Claims That Require Decisions*
2. *Approving Supplier Recovery Claim Line Items*
3. *Rejecting Supplier Recovery Claim Line Items*
4. *Submitting Decisions for Supplier Recovery Claims*

Finding Supplier Recovery Claims That Require Decisions

Over time, many supplier recovery claims are submitted and processed. It is important to be able to identify the supplier recovery claims that require decisions. To find supplier recovery claims that require decisions.

This task is a step in *Process of Reviewing and Submitting Decisions for Supplier Recovery Claims*.

To find supplier recovery claims that require decisions

1. Navigate to the Supplier Recovery Claims screen, then the Supplier Recovery Claims view.
2. Click Query.
3. Select Submitted from the Claim Status drop down list, click Go.

   All of the supplier recovery claims that require a decision are listed.

Approving Supplier Recovery Claim Line Items

Supplier recovery claims can have multiple line items. Each line item within a supplier recovery claim can have a different status. The following table describes the meaning of the status for recovery line items.

Recovery Line Item Status	Description
Submitted	The line item has been submitted, and is pending a decision.
Approved	The line item has been approved.
Rejected	The line item has been rejected.

Typically, when a supplier warranty claim has been sent for evaluation, the line item statuses will be set to Submitted. Each line item can be approved or rejected individually.

This task is a step in *Process of Reviewing and Submitting Decisions for Supplier Recovery Claims*.

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To approve supplier recovery claim line items

1. Navigate to the Supplier Recovery Claims screen, then the Supplier Recovery Claims view.
2. Drill down on the claim that you want to modify.
3. Select a line item.
4. Enter a value in the Line Accepted Amount field to indicate the approved value of the claim.
5. Click the Approve button to approve the amount that you entered in the selected line item.

    Note: The Status field is changed to Approved.

6. Repeat Step 3 through Step 5 for every line item that you want to approve.

Rejecting Supplier Recovery Claim Line Items

Occasionally, the supplier might not agree with certain line items. Reject these line items before submitting a decision.

This task is a step in *Process of Reviewing and Submitting Decisions for Supplier Recovery Claims*.

To reject supplier recovery claim line items

1. Navigate to the Supplier Recovery Claims screen, then the Supplier Recovery Claims view.
2. Drill down on the claim that you want to modify.
3. Select a Line Item.
4. Click the Reject button.

    Note: Notice that the Status field is changed to Rejected.

5. Repeat Step 3 and Step 4 for every line item that you want to reject.

Submitting Decisions for Supplier Recovery Claims

After all of the line items have been reviewed and accepted or rejected, the supplier warranty claim is then returned to the OEM for further processing. This topic describes how to submit a decision for a supplier warranty claim.

This task is a step in *Process of Reviewing and Submitting Decisions for Supplier Recovery Claims*.

To submit decisions for supplier recovery claims

1. Navigate to the Supplier Recovery Claims screen, then the Supplier Recovery Claims view.
2. Drill down on the supplier recovery claim for which you want to submit a decision.
3. Verify the details of the line items.
4. Click Submit Decision.

    When the decision is submitted, the Claim Status field changes. The value assigned to the claim status depends on the defined rules. For more information on rules, see *Siebel Automotive Guide* .

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