SIEBEL eBusiness 7

SIEBEL *e*AUTOMOTIVE GUIDE

VERSION 7.0, REV. I

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Introduction

This guide is part of a comprehensive documentation set for Siebel eAutomotive. The documentation set includes some manuals that are specific to Siebel eAutomotive (including this one) as well as manuals that pertain to all Siebel Applications.

This book will be useful primarily to people whose titles or job descriptions match one of the following:

Installers	Persons responsible for setting up Siebel eAutomotive for initial use and for installing any hardware or middleware required for Call Center functionality. An installer is typically a system administrator, database administrator, or someone from the Information Services department. This guide assumes that you have successfully installed Siebel eAutomotive.
Configurators and Application Developers	Persons responsible for planning, implementing, and configuring Siebel applications. A configurator is typically a consultant or someone from the Information Systems department.
Database Administrators	Persons who administer the database system, including data loading; system monitoring, backup, and recovery; space allocation and sizing; and user account management.
Marketing Administrators	Persons responsible for setting up and maintaining a marketing department; duties include designing and managing campaigns, product marketing information, and product distribution lists.

Call Center Administrators	Persons responsible for setting up and maintaining a call center; duties include designing and managing computer telephony integration (CTI), SmartScript, and message broadcasts.
Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Field/Sales Representatives	End users of the Siebel application.
Mobile Representatives	End users of the Siebel application who are not on the network.
Marketing Administrators	Persons responsible for setting up and maintaining a marketing department; duties include designing and managing campaigns, product marketing information, and product distribution lists.
Customer Service Representatives	Persons responsible for placing outbound calls, answering inbound calls, or both—such as for sales or support purposes.

How This Guide Is Organized

Siebel eAutomotive applications share functionality with other Siebel eBusiness applications. This guide focuses on features which are unique to the Siebel eAutomotive product. You will be referred to other guides on the *Siebel Bookshelf* for information about procedures for some products, screens, views or fields.

This book is divided into two parts:

- The first part contains information that applies to the initial setup of the Siebel eAutomotive application.
- The remaining chapters cover the different functions of the Siebel eAutomotive application.

The chapters in this guide are workflow-oriented. Each chapter guides you through an example workflow that illustrates the use of the important Siebel eAutomotive screens and views.

Revision History

Siebel eAutomotive Guide, Version 7.0, Rev. I

Overview 1

Siebel eAutomotive is a front-office automation application specifically designed for the automotive industry. Using Siebel eAutomotive, manufacturers, importers, distributors, and dealers can respond to the needs of retail and fleet customers by telephone, in person, or over the Web. They can offer customers financing, leasing, and insurance options as customers configure vehicle orders online, at the dealership, or with a fleet sales representative.

Siebel eAutomotive also allows all participants in the factory-to-dealer-to-consumer value chain to collaboratively share information, working together to deliver vehicles to customers and cooperatively gain a better understanding of customers and their needs.

Product Modules and Options

Siebel eAutomotive provides the following options:

- **Data Modeling.** Representation of the entities and relationships involved in a selling model that includes a franchised distribution channel and complex product ownership and service linkages. The basic data model allows all Call Center, Marketing, Sales, and Service capability within Siebel eAutomotive. The vehicles industry does not fall neatly into business-to-business or business-to-consumer selling. Siebel eAutomotive explicitly supports the pure form of both models, along with a business-to-everyone model that supports many hybrid models in which a consumer's work affiliation can influence the buying process.

- **Multi-Channel Communication.** Provides anonymous and known contacts, channel partners, and employees with the opportunity to interact with the enterprise in the form of their choosing, whether in person, on the phone, or electronically.

- **Dealer and Service Center Location.** A parameter-driven search allowing identification of the appropriate dealer in response to a service call or sales opportunity.

- **Legacy Systems Integration.** Provides appropriate connections to legacy application databases required to support marketing, sales, and service activities with new or existing Dealer Business Systems.

- **Lead Sharing and Tracking.** Captures sales opportunities that originate from any form of customer contact, associates them with any demographic information already available, and adds to the demographics based on the contact. Routes the opportunity to the appropriate party within the sales channel to provide follow-up.

- **Retail Sales Process Automation.** Supports the sales team in a vehicle retail sales process from prospecting through opportunity origination and follow-up to sale closure and follow-up service.

- **Customer Loyalty and Service Marketing.** Maintains ongoing contact with the retail customer to ensure satisfaction, drive service revenues, and understand needs for subsequent vehicle purchases.

Working with Accounts 2

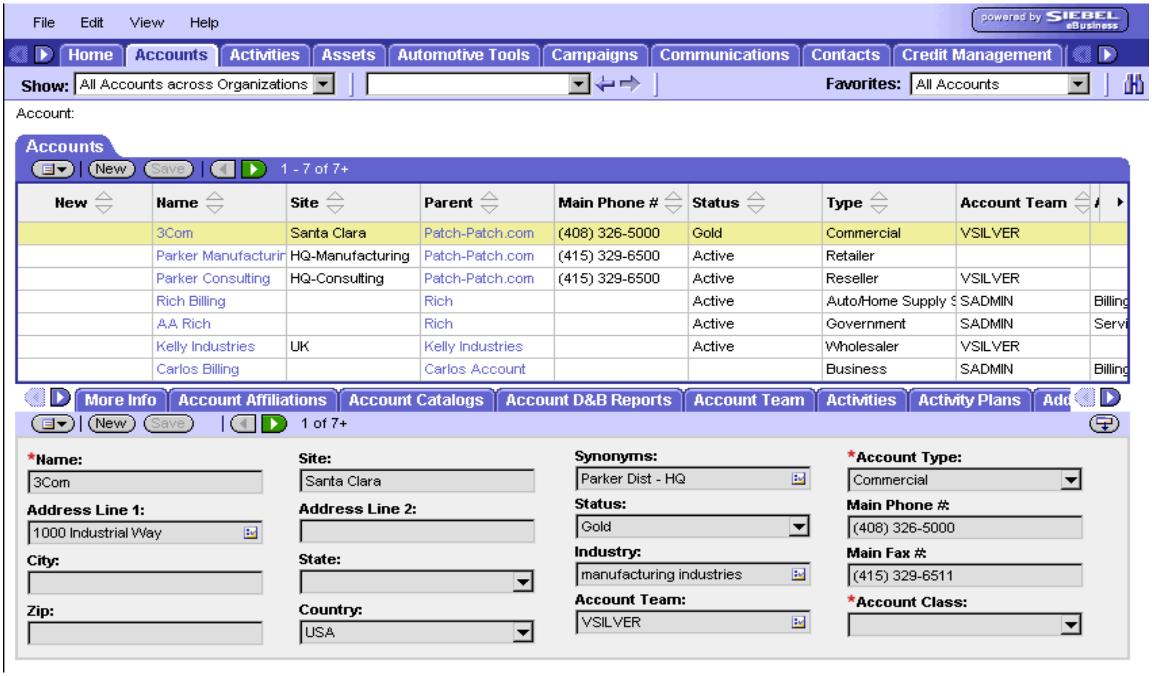
This chapter provides information about standard functionality Siebel eAutomotive for account management. Your company's application configuration and business processes may differ from the procedures or business scenarios presented in the following sections.

In Siebel eAutomotive, application administrators and end users can use the concepts and procedures in this chapter to manage accounts in their daily job roles.

Accounts represent companies or individuals with which your company conducts business. The Accounts screen allows administrators and end users to manage information associated with accounts.

Accounts Screen and Views

Figure 1 displays the main features of the Accounts screen. In Siebel eAutomotive, the availability of certain views and functionality can be limited according to each user's responsibilities. As a result, the views that appear may vary from those shown in Figure 1 and described in Table 1 on page 17.


powered by SIEBEL eBusiness
File
Edit
View
Help
Home
Accounts
Activities
Assets
Automotive Tools
Campaigns
Communications
Contacts
Credit Management
Show:
Favorites:
Account:
Accounts
New
Save
More Info
Account Affiliations
Account Catalogs
Account D&B Reports
Account Team
Activities
Activity Plans
Add
New
Save

Show: All Accounts across Organizations

Favorites: All Accounts

1 - 7 of 7+

New	Name	Site	Parent	Main Phone #	Status	Type	Account Team	
	3Com	Santa Clara	Patch-Patch.com	(408) 326-5000	Gold	Commercial	VSILVER	
	Parker Manufacturir	HQ-Manufacturing	Patch-Patch.com	(415) 329-6500	Active	Retailer		
	Parker Consulting	HQ-Consulting	Patch-Patch.com	(415) 329-6500	Active	Reseller	VSILVER	
	Rich Billing		Rich		Active	Auto/Home Supply S	SADMIN	Billing
	AA Rich		Rich		Active	Government	SADMIN	Servi
	Kelly Industries	UK	Kelly Industries		Active	Wholesaler	VSILVER	
	Carlos Billing		Carlos Account			Business	SADMIN	Billing

1 of 7+

*Name: 3Com

Site: Santa Clara

Synonyms: Parker Dist - HQ

*Account Type: Commercial

Address Line 1: 1000 Industrial Way

Address Line 2:

Status: Gold

Main Phone #: (408) 326-5000

City:

State:

Industry: manufacturing industries

Main Fax #: (415) 329-6511

Zip:

Country: USA

Account Team: VSILVER

*Account Class:

Figure 1. Accounts Screen

Table 1 on page 17 lists the views in the Accounts screen and a description of each.

Business Scenarios

This section describes the following:

- "Account Screen Views"
- "Vehicle-Owned Scenario" on page 19
- "Vehicle-Related Scenario" on page 19

Account Screen Views

The following tables lists the views of the Accounts screen.

Table 1. Views of the Accounts Screen

Feature	Comments
My Accounts	Displays a list of accounts assigned to you. Typically, you add new accounts in this view.
My Team's Accounts	Displays a list of accounts assigned to your team. A manager's own accounts also appear in this view.
All Accounts	Displays a list of all accounts throughout your company, within the organization to which you belong.
All Accounts Across Organizations	Displays all accounts throughout your company. This includes accounts that do not belong to your organization.
Explorer	Displays hierarchical information about an account in an Explorer format. The Account Explorer view is also a convenient navigation tool.
Account Team	Displays the members of the account team and their contact information.
Activities	Displays activities associated with an account.
Activity Plans	Provides a method of associating activity plan templates with an account. An activity plan template is a set of activities directed toward a specific business goal or marketing technique.
Addresses	Displays the addresses of your accounts. An address record may be shared between many contacts or many accounts. As a result, if you modify the address for a contact, it will modify the same address for other contacts and accounts that use this address record.

Table 1. Views of the Accounts Screen

Feature	Comments
Agreements	Displays a list of all agreements, such as contracts or service agreements, associated with an account.
Assessments	Provides a method of associating assessment templates with an account. An assessment template is a set of attributes used to assess the business potential of the account.
Assets	Displays a list of assets owned by the account, including vehicles.
Attachments	Displays any file attachments that are associated with an account.
Bill To/Ship To	Displays billing address and shipping address information.
Categories	Displays account information that is not tracked in the standard Accounts views.
Charts	Displays graphical representations for accounts based on specific criteria.
Contacts	Displays contacts associated with an account. Contacts are individuals with whom you currently conduct business or expect to conduct business. For more information on contacts, see Chapter 3, “Working with Contacts.”
Notes	Allows you to record unstructured responses and share notes with your sales team.
Opportunities	Displays a list of opportunities associated with an account. An opportunity is defined as a potential revenue-generating event.
Order History	Displays a list of orders associated with the account. Allows you to modify and view the status of and details for sales and service orders.
Organization Analysis	Displays an organizational chart that reflects the complex relationships that characterize accounts.
Price Lists	Displays the current price list and terms associated with the account.

Table 1. Views of the Accounts Screen

Feature	Comments
Service Requests	Displays the service requests associated with an account. A service request is a request for information or assistance with products or services that the customer purchased from the company. For more information on Service Requests, see Chapter 10, “Working with Service Requests.”
Vehicles	Displays a list of vehicles owned by or related to an account. End users can assign vehicles to an account from either the Accounts screen or the Vehicles screen. For more information on vehicles, see Chapter 4, “Working with Vehicles.”

This section provides a sample scenario for working with accounts. The order in which the procedures are performed may vary based on your company’s business practices.

Vehicle-Owned Scenario

Acme Corporation purchases a fleet of vehicles from World Motor Corporation (WMC). A fleet sales manager for WMC creates an account for Acme Corp and then creates a vehicle record associated with the Acme account for each of the fleet vehicles. See “To associate a vehicle directly with an account” on page 23.

Vehicle-Related Scenario

A sales representative from WMC’s dealership sells a vehicle to a customer, who is a contact the representative created from a walk-in at the showroom several weeks ago. World Motor Asset Corporation (WMAC) is the loan provider for the vehicle that the customer purchased. The vehicle is associated with the WMAC account through the Accounts list from the Vehicle Summary view tab. See “To associate a vehicle with an account by relationship” on page 24.

Accounts Workflow

Figure 2 illustrates the end-user workflow for working with accounts.

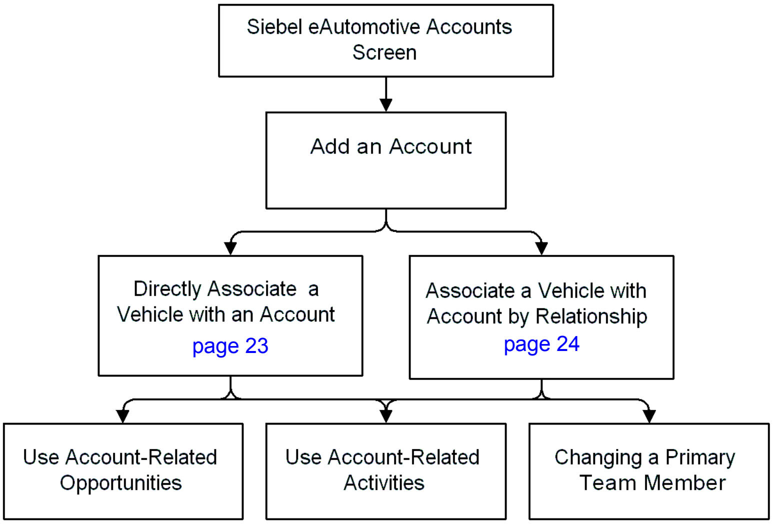

Siebel eAutomotive Accounts Screen
Add an Account
Directly Associate a Vehicle with an Account page 23
Associate a Vehicle with Account by Relationship page 24
Use Account-Related Opportunities
Use Account-Related Activities
Changing a Primary Team Member

Figure 2. Accounts Workflow

NOTE: For information about procedures not covered in this book, such as adding and account and updating opportunity information, see *Siebel Call Center User Guide*. For information about multi-organization and position visibility, see *Security Guide for Siebel eBusiness Applications*.

Administrator Procedures

You will set up the account hierarchy and organizational framework for accounts during the initial application setup. See *Applications Administration Guide* for initial and ongoing procedures.

The abbreviated tasks in this section address business reasons for maintaining data in the Accounts screen of Siebel eAutomotive.

About Maintaining Account Integrity and Performance

Accounts are primarily maintained by end users, but there are some ongoing tasks you can perform to make sure that the data integrity of accounts does not adversely affect the performance of Siebel eAutomotive.

End users may abandon accounts instead of changing their status to inactive. Abandoned accounts may increase the time necessary to conduct searches, queries, and other calls to the database.

Working with Abandoned Accounts

If Assignment Manager is being used, accounts will be transferred to new account team members during territory reassignments, attrition, and other organizational changes.

If Assignment Manager is not being used, you will need to conduct routine queries to make sure that accounts with no activity are marked as inactive, and that all accounts have an active team or at least a primary team member assigned to the account. Otherwise, accounts that are abandoned will not show up in an end user's My Accounts list. If the account is reactivated as an opportunity later, the historical activities and opportunities associated with that account will not be available.

You can create queries to monitor accounts at intervals to make sure accounts have a primary team member. If an abandoned account is located, you should change the account Status to Inactive.

NOTE: Select an inactive status for an account, unless the account is a duplicate that does not need to be merged with another account, or the inactive period exceeds the company's data retention period.

End-User Procedures

End users, primarily sales and service representatives and fleet management representatives, will work with accounts frequently in Siebel eAutomotive. How an end user proceeds depends on whether he is working with an existing account or setting up a new one. If the account exists, he may associate it with a contact or a vehicle in any of several views in the Accounts or Vehicles screens.

Once an account record has been created and a vehicle has been added to the Vehicle database by the administrator, an end user or administrator can perform any of the following procedures in any order; however, the end user may want to perform procedures in the following order for consistent account management.

The following end-user procedures are described in this section:

- "Associating a Vehicle with an Account"
- "Associating a Vehicle with an Account by Relationship" on page 24

NOTE: For additional end-user procedures related to accounts, see *Siebel Call Center User Guide*.

Associating a Vehicle with an Account

When a vehicle is associated with an account through the Vehicles screen using the More Info view tab, the vehicle is directly associated with the account. For example, the account owns the vehicle and has purchased it for its own use.

To associate a vehicle directly with an account

1. Navigate to the Vehicles screen.
2. Click the More Info view tab.
3. In the Account Name field on the More Info tab, click the select button and select the account from the Pick Account dialog box.

Associating a Vehicle with an Account by Relationship

When a vehicle is associated with an account through the Vehicle Summary screen, the vehicle is associated with the account through the relationship specified in the Vehicle Summary screen.

When an account is associated with one or more vehicles that they have not purchased, the vehicle is associated with an account by relationship. For example, the account is the lessor, or provides insurance or financing for the vehicle, but the account does not own the vehicle.

To associate a vehicle with an account by relationship

1. Navigate to the Accounts screen.
2. Select an account in the Accounts list.
3. Click the Vehicles view tab.
4. In the Related Vehicles list, click New.
5. In the Pick Vehicles dialog box, select a vehicle.
6. Complete the fields as needed.

NOTE: A vehicle can also be associated with an account through the Summary view of the Vehicles screen. In the Account list on the Summary view, select a vehicle and set the relationship.

Working with Contacts

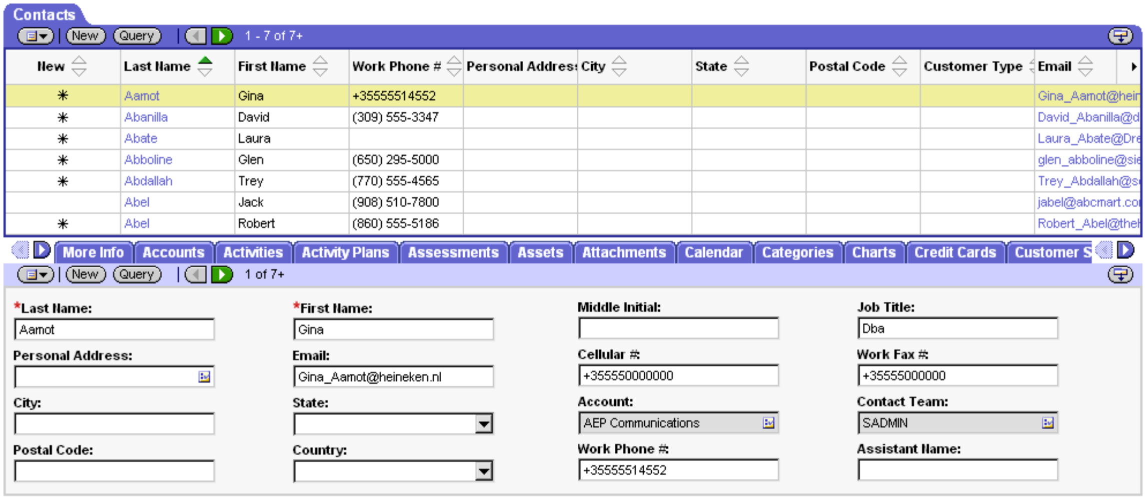
3

This chapter provides information about standard Siebel eAutomotive functionality for contact management. Your company's application configuration and business processes may differ from the procedures or business scenarios presented in the following sections.

In Siebel eAutomotive, contacts are people with whom the members of a company conduct business. Contacts can also be people with whom a company expects to conduct business. Contacts may be associated with one or more households or accounts, or they may stand on their own.

Contacts Screen

Figure 3 displays the main features of the Contacts screen. In Siebel eAutomotive, the availability of certain views and functionality can be limited according to each user's responsibilities. As a result, the views that appear may vary from those shown in Figure 3 and described in Table 2 on page 27.


Contacts
New
Query
1 - 7 of 7+
More Info
Accounts
Activities
Activity Plans
Assessments
Assets
Attachments
Calendar
Categories
Charts
Credit Cards
Customer S
New
Query
1 of 7+

New	Last Name	First Name	Work Phone #	Personal Addres:	City	State	Postal Code	Customer Type	Email
✳	Aamot	Gina	+35555514552						Gina_Aamot@hei
✳	Abanilla	David	(309) 555-3347						David_Abanilla@d
✳	Abate	Laura							Laura_Abate@Dr
✳	Abboline	Glen	(650) 295-5000						glen_abboline@si
✳	Abdallah	Trey	(770) 555-4565						Trey_Abdallah@s
	Abel	Jack	(908) 510-7800						jabel@abcmart.co
✳	Abel	Robert	(860) 555-5186						Robert_Abel@the

*Last Name: Aamot	*First Name: Gina	Middle Initial:	Job Title: Dba
Personal Address:	Email: Gina_Aamot@heineken.nl	Cellular #: +355550000000	Work Fax #: +35555000000
City:	State:	Account: AEP Communications	Contact Team: SADMIN
Postal Code:	Country:	Work Phone #: +35555514552	Assistant Name:

Figure 3. Contacts Screen

Contacts Screen Views

Table 2 describes the functions of the views specific to the Contacts screen.

NOTE: For additional views and their definitions, see Table 1 on page 17.

Table 2. Views of the Contacts Screen

Feature	Description
My Contacts	Displays a list of contacts where the user is a member of the contact team for the contact.
My Team's Contacts	Displays a list of contacts where employees who report to the user are on the contact team for the contact.
All Contacts Across Organizations	Displays all contacts throughout your company. This includes contacts that do not belong to your organization.
All Contacts	Displays a list of all contacts throughout your company, within the organization to which you belong.
My Personal Contacts	Displays a list of nonbusiness contacts that cannot be shared with others.
Manager's Explorer	Displays a hierarchical view of the contacts assigned to a manager.
Assessments	Provides a method of associating assessment templates with a contact. An assessment template is set of attributes used to assess business potential.
Contact Summary	Displays a snapshot of vehicles, households, opportunities, and service requests associated with a selected contact.
Households	Displays households associated with a contact.
Image	Displays an image of the contact.
Profile	Displays additional information about the contact, including approval authority, level of education, and preferred communication methods. This view can only be accessed by the administrator.
Quotes	Displays all the quotes associated with a contact, and provides a method for adding new quotes. A quote is a formal offer of product or service detail, price, and terms of the sale provided to potential customers. For more information about the Quotes screen, see Chapter 9, "Working with Quotes."
Relationships	Displays a list of individuals and the relationship each has to the contact.

Business Scenarios

This section provides a sample scenario for working with contacts. The order in which the procedures are performed may vary based on your company's business practices.

A potential customer contacts the call center of World Motor Corporation (WMC), expressing interest in a vehicle. A sales representative creates a contact record in Siebel eAutomotive and records the name and address for the customer. The sales representative creates categories specific to that contact and associates the categories with the contact. She also learns that an existing contact knows the current customer, so she creates a relationship between the two contact records. She associates the contact's record with one of WMC's vehicles for future reference.

Contacts Workflow

Figure 4 illustrates the end-user workflow for working with contacts.

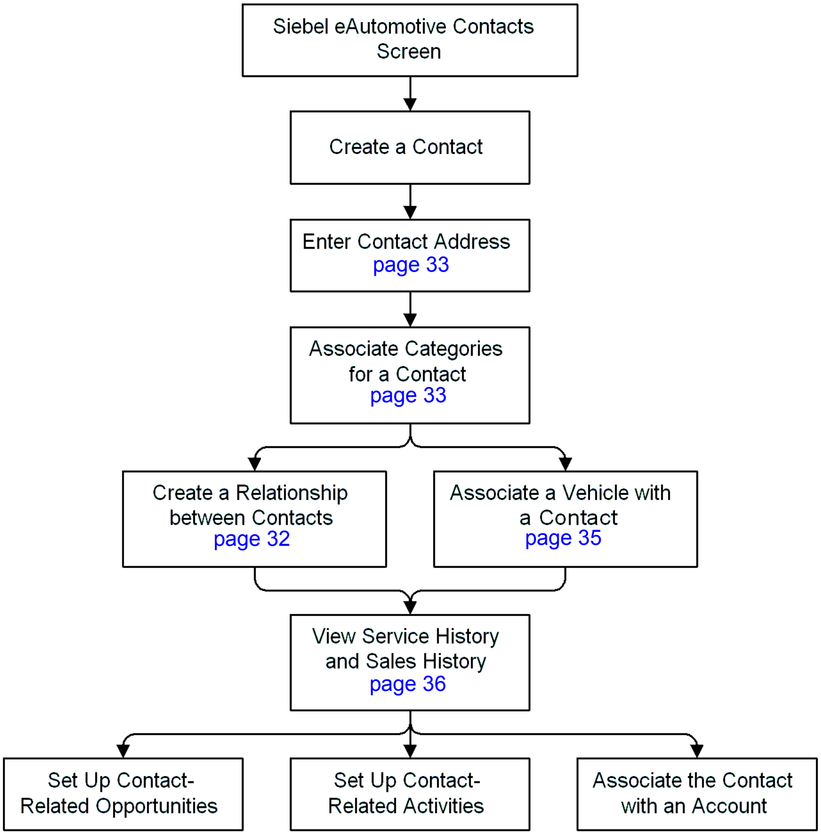

Siebel eAutomotive Contacts Screen
Create a Contact
Enter Contact Address page 33
Associate Categories for a Contact page 33
Create a Relationship between Contacts page 32
Associate a Vehicle with a Contact page 35
View Service History and Sales History page 36
Set Up Contact-Related Opportunities
Set Up Contact-Related Activities
Associate the Contact with an Account

Figure 4. Contacts Workflow

NOTE: For information about procedures not covered in this book, such as creating a contact and related activities, see *Siebel Call Center User Guide*, and for information about multi-organization and position visibility, see *Security Guide for Siebel eBusiness Applications*.

End-User Procedures

End users, primarily sales and service representatives and fleet management representatives, will work with contacts frequently in Siebel eAutomotive. How an end user proceeds depends on whether he is working with an existing contact or setting up a new one. If the contact exists, he may associate it with a household or account in one of several views in the Contacts, Households, or Accounts screens, or he may not associate it with another object at all.

The following end-user procedures are described in this section:

- "Contacts View Selected Fields" on page 31
- "Adding an Employee to the Contact Team of a Contact" on page 31
- "Adding an Image to a Contact" on page 32
- "Entering Address Information for a Contact" on page 33
- "Associating Categories with a Contact" on page 33
- "Creating a Relationship Between Contacts" on page 34
- "Associating a Vehicle with a Contact" on page 35
- "Viewing Service History and Sales History for a Contact" on page 36

Contacts View Selected Fields

A contact record allows multiple associations between most objects. Table 3 describes some common fields and their relationships in a contacts record.

Table 3. Selected Fields in the Contacts View

Field	Description
Address	More than one address may be specified for a contact. When selecting a street address for a contact associated with multiple addresses, a dialog box appears allowing an end user to select one primary address for the contact. An address record may be shared between many contacts or many accounts. As a result, if you modify the address for a contact, it will modify the same address for other contacts and accounts that use this address record.
Households	A contact may be associated with more than one household. When selecting a household for a contact associated with multiple households, a dialog box appears allowing an end user to select one primary household for the contact.
Contact Method	Allows an end user to indicate the contact's preferred method of communication by selecting it from the drop-down list.

Adding an Employee to the Contact Team of a Contact

An administrator can grant an employee access to view and update contact information by adding the individual to the contact team.

To add an employee to the contact team

1. Navigate to the Contacts screen.

   NOTE: If the contact does not appear in the My Team's Contacts view, choose View > Site Map > Contacts Administration > Contacts Administration.

2. In the Contacts list, select the contact, and then click the more/less button.

3. Click the select button in the Contact Team field, and then select the employee from the dialog box.

NOTE: The first employee added to a contact will be marked as primary. Only one employee per contact can have primary access. To change the primary access for a contact, click in the Primary field of the new employee.

Adding an Image to a Contact

An administrator can add an image for a contact that displays on the contact record. Administrators and end users both can use this image for a contact.

To add an image to a contact

1. From the application-level menu, choose View > Site Map > Document Administrations > Document Administration.
2. In the Literature view, click New.
3. In the Name field, type a name for the image to be uploaded.
4. Click the select button in the File Name field, select the file from the Add Attachment dialog box, and click Add to upload the file.
5. In the Literature Type field, select Standard Image.
6. Navigate to the Contacts screen.
7. Select the contact to which you want to add the image.
8. Click the More Info button.
9. In the Image File field, select the image from the Pick Image dialog box.

NOTE: To view the image, click the Images view tab on the Contacts screen.

Entering Address Information for a Contact

End users can update the address information for a contact.

NOTE: An address record may be shared between many contacts or many accounts. As a result, if you modify the address for a contact, it will modify the same address for other contacts and accounts that use this address record.

To enter address information for a contact

1. Navigate to the Contacts screen.
2. In the Contacts list, select the contact.
3. Click the Personal Addresses view tab.
4. To make this address the primary address, check the box in the Primary field.
5. To select an address type, select an address type such as Home or Office from the Address Type field.
6. Complete or edit the fields as needed.

Associating Categories with a Contact

If the default contact list does not contain the desired information for a contact, end users can create and associate categories for contacts. These categories may classify contacts by demographic profile, trade show attendance, or other category appropriate for the end user's company.

NOTE: An administrator can also set up and maintain a list of categories. For more information, see the chapter on setup in *Applications Administration Guide*.

To associate categories with a contact

1. Navigate to the Contacts screen.
2. In the Contacts list, select the contact to be associated with the category.
3. Click the Categories view tab.

4 Click New.

5 Complete the fields as needed. Some fields are described in the following table.

Field	Description
Category	Select the type of Contact information, such as Target, Attendee, Hobby, or Spouse. If the category does not appear in the dialog box, click New and enter information for the new category.
Category Rank	Importance of the category compared to other categories.
Value	Select the subset of the Category. The items in the Pick Value dialog box are dependent on the Category selected. If the desired value does not appear in the dialog box, click New and enter information for the new value.
Value Rank	Importance of the value compared to other values.

Creating a Relationship Between Contacts

An individual may have a relationship with other contacts who influence purchasing decisions. If so, an end user can track the relationships between the contact who has purchasing authority and those who might influence the contact's decisions.

To create a relationship between contacts

1 Navigate to the Contacts screen.

2 In the Contacts list, select the contact.

3 Click the Relationships view tab.

4 Click New in the Relationship list.

NOTE: A relationship can only be created for a contact you created.

5. Complete the fields as needed. Some fields are described in the following table.

Field	**Description**
Relationship Type	Select Spouse or Influencer from the drop-down list.
Last Name	Select the contact from the Pick Contact dialog box. The Name and Account fields are automatically populated.

Associating a Vehicle with a Contact

An end user can associate a vehicle with a contact in the Contacts screen. This lets a dealer track an individual's vehicle ownership traits, such as make or model.

To associate a vehicle with a contact

1. Navigate to the Contacts screen.
2. In the Contacts list, select the contact.
3. Click the Vehicles view tab.
4. Click New in the Vehicle list.
5. In the VIN field, click the select button, and then select the vehicle from the Pick Vehicle dialog box.

   The remaining fields are automatically populated.

   NOTE: In Siebel eAutomotive, the VIN is unique for each vehicle.

6. To change the vehicle-related preferences for the contact, edit the fields on the Preferences form.

Viewing Service History and Sales History for a Contact

The Sales History tab displays information about the sales for a contact. The Service History tab displays information about the types of services and repairs done on a contact's vehicle.

To view sales and service history information for a contact

1. Navigate to the Contacts screen.
2. In the Contacts list, select the contact.
3. To view sales history, click the Sales History view tab.

    NOTE: The Sales History view is read-only.

4. To view service history, click the Service History view tab.
5. To enter new service history information, click New and complete the fields as needed.

NOTE: For more information on service history, see Chapter 11, "Tracking Service History." For more information on sales history, see Chapter 12, "Tracking Sales History."

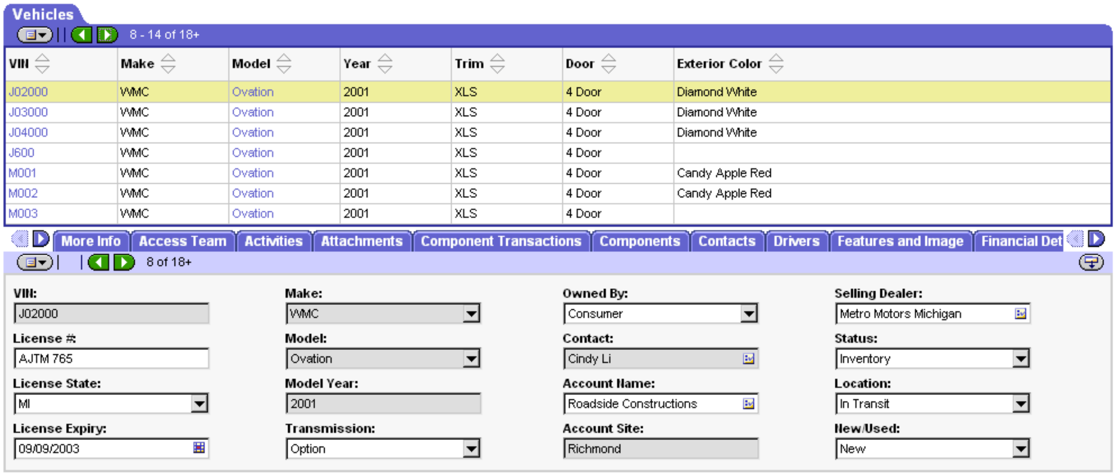
Working with Vehicles 4

This chapter provides information about standard Siebel eAutomotive functionality for vehicle management. Your company’s application configuration and business processes may differ from the procedures or business scenarios presented in the following sections.

In Siebel eAutomotive, vehicles are a specialized kind of asset. Vehicles can be owned by an account, a dealer, or an individual contact. Vehicles can also be associated in relationships other than ownership. Every vehicle is an instance of a defined Product.

Vehicles Screen and Views

Figure 5 displays the main features of the Vehicles screen. In Siebel eAutomotive, the availability of certain views and functionality can be limited according to each user's responsibilities. As a result, the views that appear may vary from those shown in Figure 5 and described in Table 4 on page 39.



Vehicles
8 - 14 of 18+
More Info
Access Team
Activities
Attachments
Component Transactions
Components
Contacts
Drivers
Features and Image
Financial Det
8 of 18+

VIN	Make	Model	Year	Trim	Door	Exterior Color
J02000	WMC	Ovation	2001	XLS	4 Door	Diamond White
J03000	WMC	Ovation	2001	XLS	4 Door	Diamond White
J04000	WMC	Ovation	2001	XLS	4 Door	Diamond White
J600	WMC	Ovation	2001	XLS	4 Door	
M001	WMC	Ovation	2001	XLS	4 Door	Candy Apple Red
M002	WMC	Ovation	2001	XLS	4 Door	Candy Apple Red
M003	WMC	Ovation	2001	XLS	4 Door	

VIN: J02000	Make: WMC	Owned By: Consumer	Selling Dealer: Metro Motors Michigan
License #: AJTM 765	Model: Ovation	Contact: Cindy Li	Status: Inventory
License State: MI	Model Year: 2001	Account Name: Roadside Constructions	Location: In Transit
License Expiry: 09/09/2003	Transmission: Option	Account Site: Richmond	New/Used: New

Figure 5. The Vehicles Screen

Vehicle Views

Table 4 describes the functions of the views specific to the Vehicles screen.

NOTE: For additional views not specific to vehicles, see Table 1 on page 17.

Table 4. Vehicles Views Available from the Show Drop-Down List

View	Description
All Vehicles Across Organizations	Displays all vehicles throughout your company. This includes vehicles that do not belong to your organization.
All Vehicles	Displays all the vehicles that are in the same organization as the user.
My Vehicles	Displays all vehicles where the user is on the access team for the vehicle.
My Team’s Vehicles	Displays all vehicles where the people reporting to the user are on the access team of those vehicles.
Access Team	Displays the list of positions that have visibility access to a vehicle.
Contacts	Displays contacts associated with a vehicle. Contacts are individuals with whom you currently conduct business or expect to conduct business.
Drivers	Displays a list of drivers for a vehicle.
Features and Image	Displays the standard features common to a vehicle, along with an image of the vehicle (not the same as the image for the product).
Financial Detail	Tracks information about a vehicle’s ownership and financing.
Options	Records and tracks options that apply to a vehicle.
Preventive Maintenance	Displays a history of maintenance and planned maintenance for a vehicle.
Sales History	Displays the sales history for a vehicle.
Service History	Displays the history of services performed on a vehicle.
Service Requests	Displays the service requests associated with a vehicle. A service request is a request for assistance with products or services.
Specifications	Displays features that have a numerical value, such as engine size.
Summary	Displays quotes and opportunities, contacts, accounts, and service requests associated with a vehicle, giving an overview of the relationship of the vehicle to various other objects.
Tracking	Records and tracks significant events and dates associated with a vehicle.

Business Scenario

This scenario is an example of a workflow performed by the administrator and end user. Your company may follow a different workflow according to its business requirements.

A call center representative for an automotive manufacturer receives an inbound call from a customer who has a question about getting service for his car. The call center representative asks the caller for the vehicle's VIN, but he does not know it. She searches on his last name and phone number in the Contacts view, and then she goes to the Contact Vehicles view to find that two vehicles are associated with this contact. From the vehicle make and model, she identifies the correct VIN and drills down on the VIN to access the Vehicles screen.

NOTE: In Siebel eAutomotive, the VIN is unique for each vehicle.

On the Vehicles screen, the call center representative finds detailed information about the vehicle, such as where and when it was built, its service and transaction history, and the individual contacts and accounts that are associated with the vehicle.

Vehicles Workflow

Figure 6 illustrates the end-user workflow for working with vehicles.

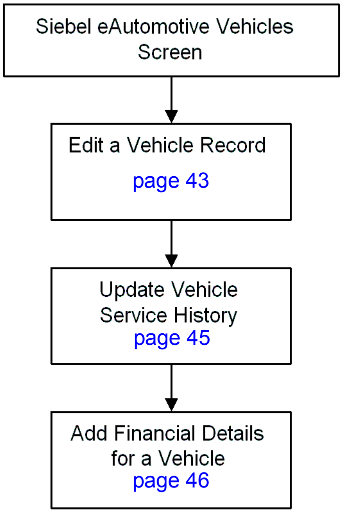

Siebel eAutomotive Vehicles Screen
Edit a Vehicle Record
page 43
Update Vehicle Service History
page 45
Add Financial Details for a Vehicle
page 46

Figure 6. Vehicles Workflow

NOTE: For information about procedures not covered in this book, such as updating contact and account information, see *Siebel Call Center User Guide*. For information about multi-organization and position visibility, see *Security Guide for Siebel eBusiness Applications*.

Administrator Procedure

Through the Vehicle Administration screen, you can add a new vehicle to Siebel eAutomotive.

Adding a Vehicle

Most Vehicle records are entered into Siebel eAutomotive through EIM rather than through manual entry. The following procedure describes how to manually enter a vehicle record. It includes a table that lists and describes selected fields that are specific to Vehicles.

To add a vehicle

1. From the application-level menu, choose View > Site Map > Vehicle Administration > Vehicle Administration.
2. In the Vehicles list, click New.
3. Complete the fields as needed. Some fields are described in the following table.

Field	Description
VIN	Vehicle Identification Number.
Product	Select the product on which the vehicle is based.
Make	Displays the manufacturer for the vehicle, populated from the Product type selected, but can be overwritten.
Model	Displays the manufacturer's model for the vehicle, populated from the Product type selected (but can be overwritten)
Owned By	Select the type of owner. Values may include Dealer, Account, Consumer, and Contact.
Account Name	Select the account to be associated with this vehicle.
Status	Select the status of the vehicle. Values may include In Transit, Rented, Suspended, Unavailable, or other values. Default value is Available.
New/Used	Select the type of vehicle ownership.

End-User Procedures

This section describes the following vehicle procedures for end users:

- "Editing a Vehicle Record"
- "Changing the Status of a Vehicle" on page 44
- "Updating Vehicle Service History" on page 45
- "Adding Financial Details for a Vehicle" on page 46

Editing a Vehicle Record

End users will not be able to add or delete vehicles, but they can make changes to vehicle records.

To edit a vehicle record

1. Navigate to the Vehicles screen.
2. In the Vehicles list, select the vehicle record to be edited
3. Make changes to the record as needed.

NOTE: Click the More Info tab to edit additional information for the vehicle.

Changing the Status of a Vehicle

The main procedure performed in the Vehicle Administration screen is changing the status of a vehicle from Allocated to Available. This view should not ordinarily be used; it exists only to correct errors when a vehicle has been removed from a quote, but its Status field is still Allocated. For more information about vehicle allocation, see "Allocating Vehicles to a Quote" on page 82.

To change the status of a vehicle

1. From the application-level menu, choose View > Site Map > Vehicle Administration > Vehicle Administration.
2. Select the vehicle whose status you want to change.
3. From the Status drop-down list, select the new status.

To delete a vehicle

1. From the application-level menu, choose View > Vehicle Administration > Vehicle Administration.
2. Select the vehicle you want to delete.
3. Click the menu button and select Delete Record.
4. Click OK.

Updating Vehicle Service History

Every time a vehicle is serviced, end users can update the service history for that vehicle.

To update vehicle service history

1. Navigate to the Vehicles screen.
2. In the Vehicles list, select the vehicle record.
3. Click the Service History view tab.
4. Click New.

NOTE: To edit a service history record, select the record from the Service History list and make any changes as needed.

5. Complete the following fields as needed.

Field	Description
SH #	Service History number, automatically generated by Siebel eAutomotive.
Name	Descriptive name of the service done on the vehicle.
SR #	Select the service request from the Pick Service Request dialog box.
Service Center	Select the name of the center that provided the service from the Pick Service Center dialog box.

Adding Financial Details for a Vehicle

End users can add details about a vehicle's lease, loan, or cash payment options through the Vehicles Financial Details view tab.

To add financial details for a vehicle

1. Navigate to the Vehicles screen.
2. In the Vehicles list, select the vehicle record.
3. Click the Financial Details view tab.
4. Click New.
5. Complete the following fields as needed.

Field	Description
Sales History Id	Select the sales history record from the Sales History dialog box.
Financing Type	Select how the vehicle was financed. Values include Cash, Loan, or Lease.
Owned By	Select the type of ownership. Values include Business, Fleet, Company Car, and others.
Financier	Type the name of the financier.
Dealer	Select the name of the selling dealer from the Pick Dealer dialog box.

NOTE: Depending on the Financing Type, the form below the Financial Details form will display different fields. For example, if the Financing Type is Lease, the lower form displays tax rate percentages, monthly payments, and capitalization information; if the Financing Type is Cash, the lower form displays capitalized cost reductions and additions and total cost information.

Working with Dealers 5

This chapter provides information about standard Siebel eAutomotive functionality for dealer management. Your company's application configuration and business processes may differ from the procedures or business scenarios presented in the following sections.

In Siebel eAutomotive, a dealer is a franchised business, such as a car dealership, that is responsible for selling vehicles and providing service to the consumer after the sale.

A dealer is both a target account and also a partner company to a manufacturer.

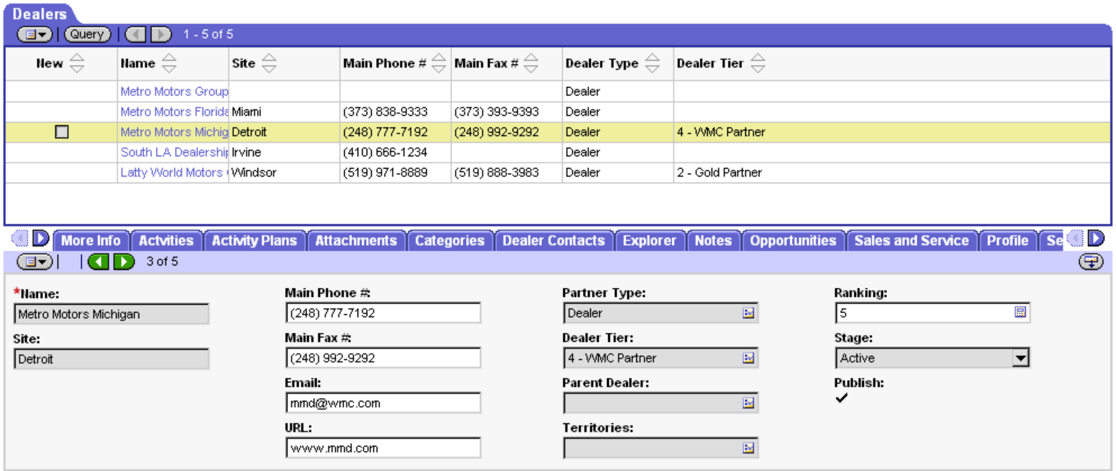
Dealers are viewed as:

- Partner companies to the sales and service organization of a manufacturer because they need to collaborate on opportunities and service requests
- Target customers to the field sales and service people of a manufacturer.

For information about sharing information with dealers, see *Siebel eDealer Administration Guide*.

Dealers Screen and Views

Figure 7 displays the main features of the Dealers screen. In Siebel eAutomotive, the availability of certain views and functionality can be limited according to each user's responsibilities. As a result, the views that appear may vary from those shown in Figure 7 and described in Table 5 on page 49.


Dealers
Query
1 - 5 of 5
More Info
Actvities
Activity Plans
Attachments
Categories
Dealer Contacts
Explorer
Notes
Opportunities
Sales and Service
Profile
Se
3 of 5

New	Name	Site	Main Phone #	Main Fax #	Dealer Type	Dealer Tier
	Metro Motors Group				Dealer	
	Metro Motors Florid	Miami	(373) 838-9333	(373) 393-9393	Dealer	
☐	Metro Motors Michig	Detroit	(248) 777-7192	(248) 992-9292	Dealer	4 - WMC Partner
	South LA Dealershi	Irvine	(410) 666-1234		Dealer	
	Latty World Motors	Windsor	(519) 971-8889	(519) 888-3983	Dealer	2 - Gold Partner

*Name: Metro Motors Michigan
Site: Detroit
Main Phone #: (248) 777-7192
Main Fax #: (248) 992-9292
Email: mmd@wmc.com
URL: www.mmd.com
Partner Type: Dealer
Dealer Tier: 4 - WMC Partner
Parent Dealer:
Territories:
Ranking: 5
Stage: Active
Publish: ✓

Figure 7. The Dealers Screen

Table 5 describes the functions of the views specific to the Dealers screen.

NOTE: For additional views not specific to dealers, see Table 1 on page 17.

Table 5. Dealer Views

View	Comments
My Dealers	Displays dealers for which end users are on the Account Team.
My Team’s Dealers	Displays dealers assigned to end users’ direct reports.
All Dealers	Displays a list of all dealers set up by the administrator within end users’ organization.
All Dealers Across Organizations	Displays all dealers across the entire list of organizations. For more information on organizations, see *Applications Administration Guide*.
More Info	Displays additional information about the item selected in the Dealers list.
Categories	Displays dealer information that is not tracked in the standard Dealers views.
Dealer Contacts	Allows end users to manage all contacts for a dealer. For more information on a contact, drill down on a record to access the Contact Activities view.
Sales and Service	Displays the list of vehicle makes that a dealer sells and services. Also displays hours of operation for a dealer’s sales and service departments.
Service Requests	Displays the service requests initiated by a dealer, or if the dealer has been defined as the associated account. Generally this means action will be taken on the dealer’s behalf and the dealer will be notified upon completion.
Dealer Performance	Generates and displays a chart covering dealer performance over time.
Revenues	Displays a dealer’s revenue amount in table or chart format.

Business Scenario

This scenario is an example of a workflow performed as an end user. Your company may follow a different workflow according to its business requirements.

A field representative for World Motors Corporation (WMC) is responsible for working with auto dealers in Michigan to make sure that they effectively represent the WMC brand and satisfy their shared customers. He is assigned the new dealership that the administrator has just established.

The representative uses Siebel eAutomotive to track his interactions with the new dealer and as a repository for documents and general information about the dealer. He defines the different categories that will be used for the dealer.

Dealers Workflow

Figure 8 illustrates the end-user workflow for working with dealers.

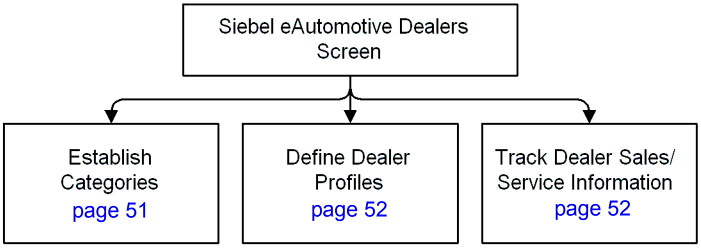

Siebel eAutomotive Dealers Screen
Establish Categories page 51
Define Dealer Profiles page 52
Track Dealer Sales/ Service Information page 52

Figure 8. Dealers Workflow

NOTE: For information about procedures not covered in this book, such as updating contact and activity information, see *Siebel Call Center User Guide*.

End-User Procedures

Siebel eAutomotive gives end users the option of structuring customer information by focusing on dealers rather than contacts. Once the administrator has created a record for the dealer, end users can add information on activities, contacts, opportunities, and agreements associated with the dealer.

This section describes the following dealer procedures for end users:

- "Establishing Categories"
- "Defining Dealer Profiles" on page 52
- "Tracking Dealer Sales and Service Information" on page 52

Establishing Categories

Categories can be created to track any information that end users want to use for dealers, such as what competing dealerships are owned by the same dealer, or what dealer business system the dealer uses.

To create a new category

1. Navigate to the Dealers screen.
2. Select a dealer from the Dealers list.
3. Click the Categories view tab.
4. In the Dealer Categories list, click New.
5. Complete the fields as needed. Some fields are described in the following table.

Field	**Description**
Category	Select the type of Contact information, such as Target, Attendee, Hobby, or Spouse. If the category does not appear in the dialog box, click New and enter information for the new category.
Category Rank	Importance of the category compared to other categories.

Field	Description
Value	Select the subset of the Category. The items in the Pick Value dialog box are dependent on the Category selected. If the desired value does not appear in the dialog box, click New and enter information for the new value.
Value Rank	Importance of the value compared to other values.

Defining Dealer Profiles

A dealer profile displays additional information about the dealer, including information about the dealer's revenue, competition, and products.

To define a dealer profile

1. Navigate to the Dealers screen.
2. In the Dealers list, select a dealer.
3. Click the Profiles view tab.
4. Click Edit.
5. In the Dealer Profiles form, complete the fields as needed.

Tracking Dealer Sales and Service Information

For each dealer, end users can track information about which vehicle makes are sold or serviced and the hours of operation for its sales and service departments.

To add a make to a dealer

1. Navigate to the Dealers screen.
2. In the Dealers list, select a dealer.
3. Click the Sales and Service view tab.
4. From the Show drop-down list, choose Makes.

5. In the Makes list, click New.
6. In the Make field, choose a make from the list of values.
7. Click to check the fields for Sales, Service, or Parts to indicate the availability of these franchises for the selected vehicle make.

To list hours for a dealer

1. Navigate to the Dealers screen.
2. In the Dealers list, select a dealer.
3. Click the Sales and Service view tab.
4. From the Show drop-down list in the Sales and Service screen, choose Hours.
5. To specify sales department hours, click the Sales Hours list, or to specify service department hours, click on the Service Hours list.

   The next step applies to both the Sales Hours and Service Hours lists.
6. For each day of the week that the department is open, do the following:
   - **a** Click New.
   - **b** Select the Day of the week.
   - **c** Enter a Start Time and an End Time for the day.

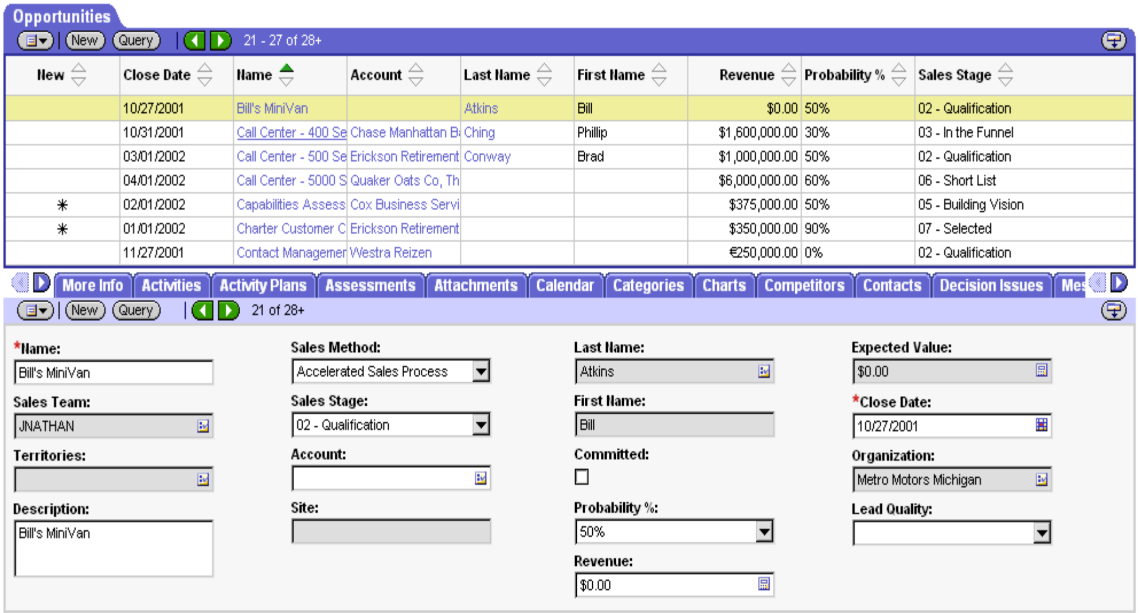
Working with Opportunities 6

This chapter provides information about standard Siebel eAutomotive functionality for opportunity management. Your company's application configuration and business processes may differ from the procedures or business scenarios presented in the following sections.

In Siebel eAutomotive, an *opportunity* is a potential revenue-producing event. An opportunity often has a close date, a win probability, and a sales team.

Opportunities Screen

Figure 9 shows the views in the Opportunities screen. In all Siebel products, the availability of certain views and functionality can be limited according to each user's responsibilities. As a result, the views that display may vary from those shown in Figure 9 and described in Table 6 on page 57.


Opportunities
New
Query
21 - 27 of 28+
More Info
Activities
Activity Plans
Assessments
Attachments
Calendar
Categories
Charts
Competitors
Contacts
Decision Issues
Mes
New
Query
21 of 28+

New	Close Date	Name	Account	Last Name	First Name	Revenue	Probability %	Sales Stage
	10/27/2001	Bill's MiniVan		Atkins	Bill	$0.00	50%	02 - Qualification
	10/31/2001	Call Center - 400 Se	Chase Manhattan B	Ching	Phillip	$1,600,000.00	30%	03 - In the Funnel
	03/01/2002	Call Center - 500 Se	Erickson Retirement	Conway	Brad	$1,000,000.00	50%	02 - Qualification
	04/01/2002	Call Center - 5000 S	Quaker Oats Co, Th			$6,000,000.00	60%	06 - Short List
*	02/01/2002	Capabilities Assess	Cox Business Servi			$375,000.00	50%	05 - Building Vision
*	01/01/2002	Charter Customer C	Erickson Retirement			$350,000.00	90%	07 - Selected
	11/27/2001	Contact Managemer	Westra Reizen			€250,000.00	0%	02 - Qualification

*Name: Bill's MiniVan
Sales Team: JNATHAN
Territories:
Description: Bill's MiniVan
Sales Method: Accelerated Sales Process
Sales Stage: 02 - Qualification
Account:
Site:
Last Name: Atkins
First Name: Bill
Committed: ☐
Probability %: 50%
Revenue: $0.00
Expected Value: $0.00
*Close Date: 10/27/2001
Organization: Metro Motors Michigan
Lead Quality:

Figure 9. The Opportunities Screen

Opportunities Screen Views

Table 6 describes the functions of the views specific to the Opportunities screen.

NOTE: For additional views not specific to opportunities, see Table 1 on page 17

Table 6. Opportunities Views

View	Comments
My Opportunities	Displays a list of opportunities assigned to end users. Typically, new opportunities are added in this view.
My Team’s Opportunities	Displays a list of opportunities assigned to end users’ team.
All Opportunities	Displays a list of all opportunities throughout end users’ company, within the organization to which end users belongs.
All Opportunities Across Organizations	Displays all opportunities throughout end users’ company. This includes opportunities that do not belong to end users’ organization.
All Opportunities Across My Organizations	Displays all opportunities that belong to end users’ organization.
Explorer	Displays an Explorer view of end users’ opportunities.
Manager’s Explorer	Displays an Explorer view of a manager’s opportunities.
More Info	Displays the sales method, sales stage, associated account, and other information related to an opportunity.
Competitors	Displays competitors associated with an opportunity and records the details of the competitors’ proposals and marketing tactics.
Forecasts	Tracks revenue within opportunities and presents a summary view of data.
Partners	Displays accounts associated with an opportunity that are designated as partners.
Revenues	Displays revenue information for an opportunity.

End-User Procedure

Many of the procedures for working with opportunities can be found in *Siebel Sales User Guide*. A procedure that is specific to Siebel eAutomotive is adding revenue information to an opportunity.

NOTE: For additional end-user procedures related to opportunities, see *Siebel Call Center User Guide*.

Associating a Vehicle with an Opportunity

Using the Opportunities Revenues view tab, end users can associate a vehicle, vehicle model, and product line with an existing opportunity.

To associate a vehicle with an opportunity

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity to be associated with the vehicle.
3. Click the Revenues view tab.
4. From the first Show drop-down list on the Revenues view tab, select List.
5. Click New.
6. Complete the fields as needed. Some fields are described in the following table.

Field	Description
Commit	Click to check this field if the opportunity has agreed to purchase the vehicle.
Product	Select a product from the list of available products.
Product Line	Select a product line for the product.
VIN	Select a vehicle from the list of available vehicles.
Type	Select an opportunity type. Values include Actual, Shipped, Billed, Booked, Projected, Quota.
Revenue	Amount expected to make from the opportunity.

Working with Products 7

This chapter provides information about standard Siebel eAutomotive functionality for product management. Your company's application configuration and business processes may differ from the procedures or business scenarios presented in the following sections.

There are two main types of products in Siebel eAutomotive: products of Type = Vehicle and Type = Option. A product of Type = Option can be associated with a product of Type Vehicle. Once this association has been made, the options associated with the vehicle product become valid options for the vehicle product.

Both vehicle and option products have their own distinct sets of features and specifications, which can be edited by the administrator.

Additionally, a list of valid options display in the options view of the Vehicle screen. These valid options come from the product on which the vehicle has been based. You can select options for that particular vehicle from this list of valid options.

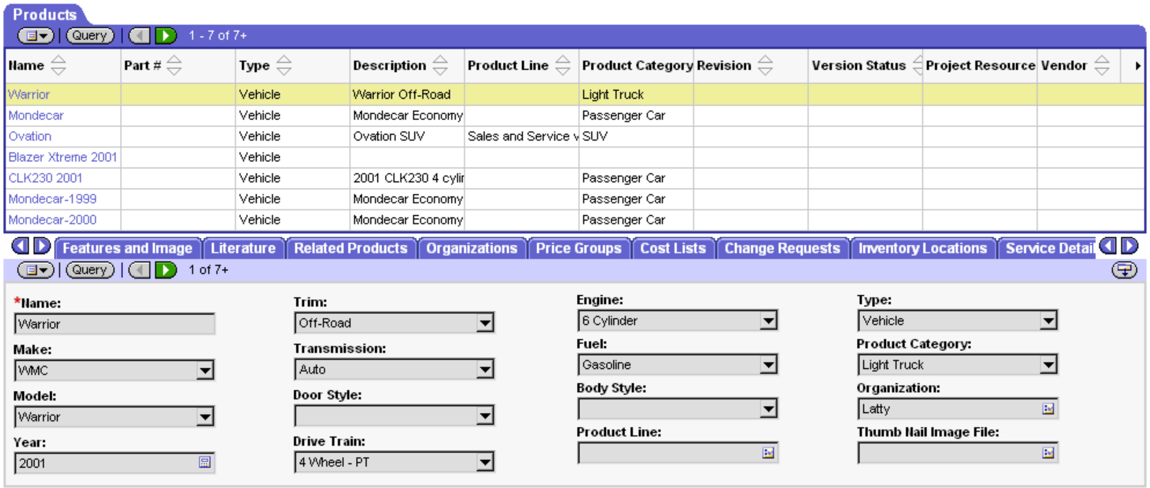
In Siebel eAutomotive, products may be vehicle models, options, or groups of options associated with a product.

NOTE: The Products screen displays information about hypothetical products that have no physical instance, while the Vehicles screen provides information about specific, physical vehicles. A product is an idea or a concept, while a vehicle is something real that can be driven, serviced, and sold to customers.

To effectively set up products and their associated attributes, follow the workflow process that is described in *Product Administration Guide* before performing procedures in this chapter.

Products Screen

Figure 10 displays the main features of the Products screen. In Siebel eAutomotive, the availability of certain views and functionality can be limited according to each user’s responsibilities. As a result, the views that appear may vary from those shown in Figure 10 and described in Table 7 on page 61.


Products
Query
1 - 7 of 7+
Features and Image
Literature
Related Products
Organizations
Price Groups
Cost Lists
Change Requests
Inventory Locations
Service Detail
Query
1 of 7+

Name	Part #	Type	Description	Product Line	Product Category	Revision	Version Status	Project Resource	Vendor
Warrior		Vehicle	Warrior Off-Road		Light Truck				
Mondecar		Vehicle	Mondecar Economy		Passenger Car				
Ovation		Vehicle	Ovation SUV	Sales and Service v	SUV				
Blazer Xtreme 2001		Vehicle							
CLK230 2001		Vehicle	2001 CLK230 4 cylir		Passenger Car				
Mondecar-1999		Vehicle	Mondecar Economy		Passenger Car				
Mondecar-2000		Vehicle	Mondecar Economy		Passenger Car				

*Name: Warrior
Make: WMC
Model: Warrior
Year: 2001
Trim: Off-Road
Transmission: Auto
Door Style:
Drive Train: 4 Wheel - PT
Engine: 6 Cylinder
Fuel: Gasoline
Body Style:
Product Line:
Type: Vehicle
Product Category: Light Truck
Organization: Latty
Thumb Nail Image File:

Figure 10. Products Screen

Products Screen Views

Table 7 describes the functions of the views specific to the Products screen.

NOTE: For additional views not specific to products, see Table 1 on page 17.

Table 7. Products Views

Feature	Description
All Products Across Organizations	Displays all products in all catalogs. This includes products that do not belong to your organization.
All Products	Displays a list of all products throughout your company, within the organization to which you belong.
Products Across Catalogs	Displays all products in all catalogs. This includes products that do not belong to your organization.
Product Comparison	Displays a feature-by-feature comparison of a product with other related products.
Features and Images	Displays a list of auto features and images associated with the selected product.
Literature	Displays literature associated with the selected product.
Related Products	Displays a list of products related to the selected product. Related products may be components of the selected product.
Cost Lists	Displays the cost lists associated with the product. A cost list is required in order for the Siebel Pricing Configurator to provide dynamic product pricing. Cost lists are optional without dynamic pricing. See *Pricing Administration Guide* for more information on cost lists.
Product Issues	Displays a description and discussion of product issues.
Specifications	Displays features that have a numerical value, such as engine size.
Valid Options	Displays lists of option features and options associated with the selected product.
Consumption	Displays consumption information in list and chart formats.

Business Scenario

This scenario is an example of a workflow performed as an administrator. Your company may follow a different workflow according to its business requirements.

Administrator tasks, such as setting up products, specifications, features, and options must all be performed prior to the following business scenario.

A customer buys a new car from a dealership. There were three valid options for the product: CD player, cassette player, and sunroof. The customer chose only the cassette player and the sun roof. The sunroof and cassette player are the options for the vehicle. All three are valid options for the product and vehicle.

Products Workflow

Figure 11 illustrates the administrator workflow for working with products.

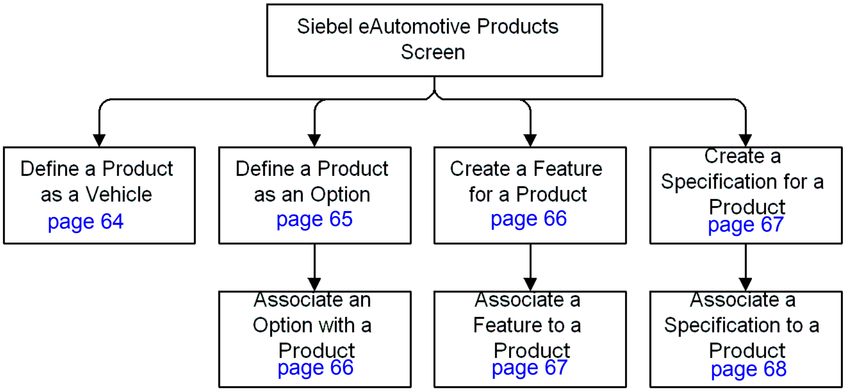

Siebel eAutomotive Products Screen
Define a Product as a Vehicle page 64
Define a Product as an Option page 65
Create a Feature for a Product page 66
Create a Specification for a Product page 67
Associate an Option with a Product page 66
Associate a Feature to a Product page 67
Associate a Specification to a Product page 68

Figure 11. Products Workflow

NOTE: For more information on initial setup for products, see *Product Administration Guide.*

Administrator Procedures

After a product has been created, you can define the features, specifications, and options for a product through the Product Administrations screen. Defining these attributes allows end users to view and use information about a product in a sales or service interaction with a potential customer.

This section describes the following product procedures for administrators:

- "Defining a Product's Information"
- "Associating Valid Options with a Product" on page 65.
- "Adding Product Features and Specifications" on page 66.

Defining a Product's Information

After defining a product, you can define product information about options, features, and specifications.

NOTE: The More Info view will change according to what is chosen in the Type field on the Product form.

To define a product as a vehicle

1. From the application-level menu, choose View > Site Map > Product Administration.
2. In the Products form, click New.
3. Complete the fields as needed. Some fields are described in the following table.

Field	Description
Type	Select Vehicle from the drop-down list. This selection must be made first, as other fields are determined by Type: Vehicle.
Make	Choose a manufacturer for the vehicle.
Model	Choose the manufacturer's model for the vehicle.

Field	**Description**
Year	Enter the manufacturer year for the vehicle.
Transmission	Select the transmission type. Values may include Auto, Option, or Manual.
Door Style	Select the number of doors. Values include 2 Door, 3 Door, or 4 Door.
Drive Train	Select the drive train. Values include 2 Wheel, 4 Wheel PT, Option, 4 Wheel FT.
Engine	Select the engine size of the vehicle.
Fuel	Select the type of fuel used by the vehicle.
Body Style	Select the body style for the vehicle. Values may include Coupe, Sedan, Hatchback, Salon, and others.
Product Category	Displays a list of categories based on vehicle information. Values may include Light Truck, Heavy Truck, SUV, Passenger Car, and others.

Associating Valid Options with a Product

For an option to be associated with a vehicle as an installed option, you must first associate an optional product with the vehicle's product definition as a valid option.

To define a product as an option

1. From the application-level menu, choose View > Site Map > Product Administration.
2. In the Products form, click New.
3. In the Type field, select Option.
4. If the newly defined option is to be associated with one or more vehicles, click on the Create Asset button in the form to create an asset.
5. Complete the remaining fields as needed.

To associate an option with a product of Type = Vehicle

1. From the application-level menu, choose View > Site Map > Product Administration.
2. Select the vehicle product.
3. Click the Valid Options view tab.
4. In the Valid Options list, click the menu button and select New Record.
5. Select a product from the Product Option dialog box.

Adding Product Features and Specifications

You can add features and specifications that are related to an automotive product to supply sales and service personnel with additional information.

NOTE: You must create features and specifications before adding them to a specific product.

To create a feature for a product

1. From the application-level menu, choose View > Site Map > Product Feature Administration > Product Feature Administration.
2. Click New.
3. Complete the fields as needed. Some fields are described in the following table.

Field	Description
Category	Select a category for the feature. Values may include Drive Train, Safety, Suspension, and others. This list of values can be defined by choosing View > Site Map > Applications Administration > List of Values.
Name	Give a brief name for the feature.
Description	Describe the feature.

To associate a feature with a product

1 From the application-level menu, choose View > Site Map > Product Administration > Product Administration.

2 In the Products list, select the product.

3 Click the Auto Features view tab.

4 Click New.

5 Click New and complete the following fields as needed.

Field	**Description**
Category	Select the category for the feature you just created in Product Specification Administration.
Name	Click the select button and select a feature from the Pick Product Feature dialog box.

To add a specification for a product

1 From the application-level menu, choose View > Site Map > Product Specification Administration > Product Specification Administration.

2 Click New.

3 Complete the fields as needed. Some fields are described in the following table.

Field	**Description**
Category	Select a category for the specification. Values may include Suspension, Telematics, Power Features, and others.
Description	Describe the specification.
Name	Give a brief name for the specification.

To associate a specification with a product

1. From the application-level menu, choose View > Site Map > Product Administration > Product Administration.
2. In the Products list, select the product.
3. Click the Specifications view tab.
4. Click New and complete the following fields.

Field	Description
Category	Select the category for the specification you just created in Product Specification Administration.
Name	Click the select button and select a specification from the Pick Product Specification dialog box.
Value	Type a value for the specification.

Setting Up Households

8

This chapter provides information about standard Siebel eAutomotive functionality for household management. Your company's application configuration and business processes may differ from the procedures or business scenarios presented in the following sections.

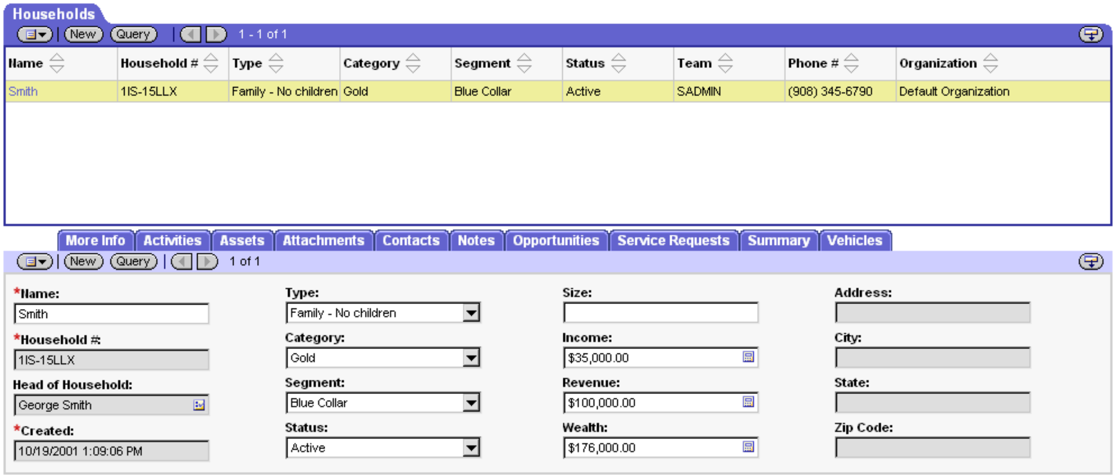
Households are comprised of individual consumers, or contacts, that are economically affiliated and who share common purchasing or service interests. The Households screen provides information on households and the relationships that contacts have with households.

Households are optional and are not required to effectively use Siebel eAutomotive; however, if your company plans to target marketing and sales campaigns to a demographic group of potential customers, then household information may be valuable to marketing, sales, and service managers.

Through the association of contacts with households, Siebel eAutomotive allows marketing and service managers to see vehicles, opportunities, and service requests associated with household members. Managers can also use Siebel Analytics to segment household data to target households that meet various demographic and purchasing trend criteria.

Households Screen

Figure 12 displays the main features of the Households screen. In Siebel eAutomotive, the availability of certain views and functionality can be limited according to each user's responsibilities. As a result, the views that appear may vary from those shown in Figure 12 and described in Table 8 on page 71.


Households
New
Query
1 - 1 of 1
More Info
Activities
Assets
Attachments
Contacts
Notes
Opportunities
Service Requests
Summary
Vehicles
New
Query
1 of 1

Name	Household #	Type	Category	Segment	Status	Team	Phone #	Organization
Smith	1IS-15LLX	Family - No children	Gold	Blue Collar	Active	SADMIN	(908) 345-6790	Default Organization

*Name: Smith
*Household #: 1IS-15LLX
Head of Household: George Smith
*Created: 10/19/2001 1:09:06 PM
Type: Family - No children
Category: Gold
Segment: Blue Collar
Status: Active
Size:
Income: $35,000.00
Revenue: $100,000.00
Wealth: $176,000.00
Address:
City:
State:
Zip Code:

Figure 12. Households Screen

Households Screen Views

Table 8 describes the functions of the views specific to the Households screen.

NOTE: For additional views not specific to households, see Table 1 on page 17.

Table 8. Views of the Households Screen

Field	Description
All Households	Displays a list of all households throughout your company, within the organization to which you belong.
My Households	Displays a list of households assigned to you. Typically, you add new households in this view.
All Households Across Organization	Displays all households throughout your company.
My Team’s Households	Displays a list of households assigned to your team.
Summary	Displays a summary of opportunities, vehicles, service requests, and quotes associated with contacts who are members of a household.
Vehicles	Displays vehicle information, including VIN#, make, and model associated with a household. A hyperlink in the VIN# field navigate to the Auto Vehicle Standard Features and Image view. A hyperlink in the Model field navigate to the Product Features and Image view.

Business Scenario

This section provides a scenario for business-to-consumer selling. The order in which the procedures are performed may vary based on your company's business practices.

A sales representative at an auto dealership sold a vehicle to a customer who is a stock broker with a high income and net worth. The sales representative entered the customer as a contact, qualified the opportunity, and then associated activities with the sales opportunity. The representative also created a household and associated it with the customer as the primary contact.

The representative learned that the customer's wife and college-aged daughters own and drive a total of three vehicles. The daughters now share a vehicle, but since they are going to different colleges, the household will need to add a vehicle. The sales representative enters the information into Siebel eAutomotive and sends product literature with a letter inviting the customer and his family to come test drive a new vehicle.

End-User Procedures

End users, primarily sales and service representatives, will work with households in Siebel eAutomotive. How an end user proceeds depends on whether he is working with an existing household or setting up a new one. If the household exists, he may associate it with a contact from the Household screen, but all other associations must be made from the Contacts screen.

NOTE: Application administrator procedures that are specific to their job role are described in the *Applications Administration Guide*. Additionally, application administrators may perform end user procedures described in this chapter.

This section describes the following household procedures for end users:

- "Viewing Vehicles Associated with a Household"
- "Associating Team Members with a Household" on page 74

Viewing Vehicles Associated with a Household

In the Vehicles screen, one or more vehicles can be associated to a contact, and that contact may belong to a household. Vehicle information can provide household trends about make, model, and other vehicle features within a household.

To view vehicles associated with a household

1. Navigate to the Households screen.
2. In the Households list, select the household.
3. Click the Vehicles view tab.

Associating Team Members with a Household

Sales and service team members can be associated with a household to add and qualify opportunities and perform follow up sales, marketing, and service procedures.

To associate team members with a household

1. Navigate to the Households screen.
2. In the Households list, select the household.
3. Click the select button in the Team field and add one or more team members from the Team Members dialog box.

NOTE: The first team member added to a household will be marked as the primary access. Only one team member per household can have primary access. To change the primary access for a household, click in the Primary field of the team member who has primary access.

Working with Quotes

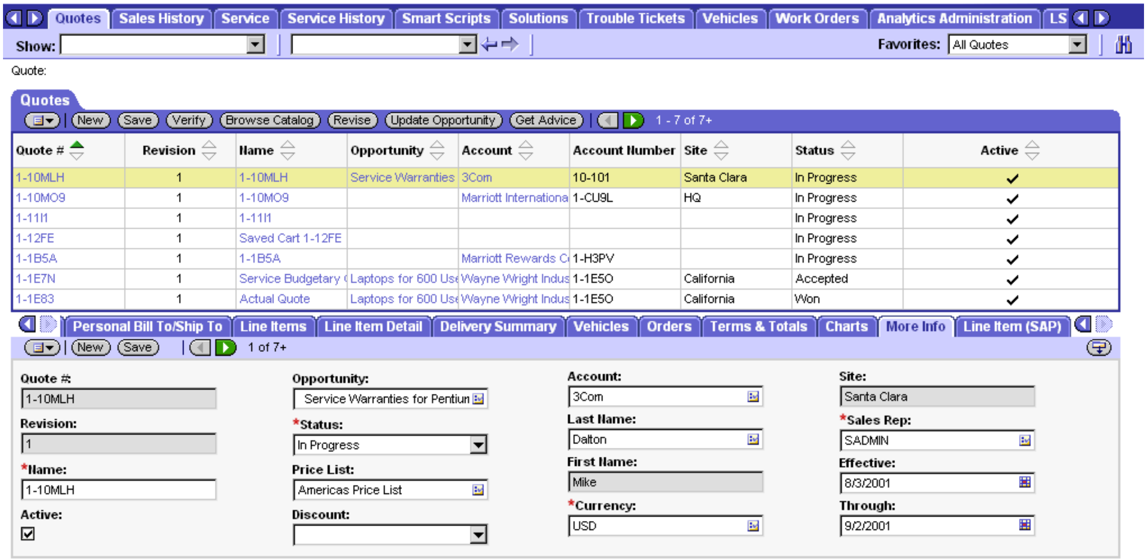
9

A quote is a formal offer for products or services proposed at specific prices and related payment terms that are sent to prospective customers.

Quotes are used to give the individual or business customer a representation of the total cost for vehicles and services they are considering. A customer service representative can give the customer a quote that is structured to meet his or her requirements.

Quotes Screen

Figure 13 displays the main features of the Quotes screen. In Siebel eAutomotive, the availability of certain views and functionality can be limited according to each user's responsibilities. As a result, the views that appear may vary from those shown in Figure 13 and described in Table 9 on page 77.


Quotes
Sales History
Service
Service History
Smart Scripts
Solutions
Trouble Tickets
Vehicles
Work Orders
Analytics Administration
LS
Show:
Favorites:
All Quotes
Quote:
Quotes
New
Save
Verify
Browse Catalog
Revise
Update Opportunity
Get Advice
1 - 7 of 7+
Personal Bill To/Ship To
Line Items
Line Item Detail
Delivery Summary
Vehicles
Orders
Terms & Totals
Charts
More Info
Line Item (SAP)
New
Save
1 of 7+

Quote #	Revision	Name	Opportunity	Account	Account Number	Site	Status	Active
1-10MLH	1	1-10MLH	Service Warranties	3Com	10-101	Santa Clara	In Progress	✓
1-10MO9	1	1-10MO9		Marriott Internationa	1-CU9L	HQ	In Progress	✓
1-11I1	1	1-11I1					In Progress	✓
1-12FE	1	Saved Cart 1-12FE					In Progress	✓
1-1B5A	1	1-1B5A		Marriott Rewards C	1-H3PV		In Progress	✓
1-1E7N	1	Service Budgetary	Laptops for 600 Us	Wayne Wright Indus	1-1E5O	California	Accepted	✓
1-1E83	1	Actual Quote	Laptops for 600 Us	Wayne Wright Indus	1-1E5O	California	Won	✓

Quote #: 1-10MLH
Revision: 1
*Name: 1-10MLH
Active: ☑
Opportunity: Service Warranties for Pentiun
*Status: In Progress
Price List: Americas Price List
Discount:
Account: 3Com
Last Name: Dalton
First Name: Mike
*Currency: USD
Site: Santa Clara
*Sales Rep: SADMIN
Effective: 8/3/2001
Through: 9/2/2001

Figure 13. The Quotes Screen

Quotes Screen Views

Table 9 describes the functions of the views specific to the Quotes screen.

NOTE: For additional views not specific to quotes, see Table 1 on page 17.

Table 9. Quotes Views

View	Description
My Quotes	Displays only those quotes for which you are the designated sales representative.
My Delegated Quotes	Displays quotes created by you and assigned to another sales representative.
My Team's Quotes (admin/manager)	Displays the Quote List view, where you can view a list of quotes for your direct reports. For quotes to appear on this view, your direct or indirect report must be marked primary.
All Quotes	Displays all quotes in the system, within the organization to which you belong.
All Quotes Across Organizations	View all quotes throughout your company. This includes quotes that do not belong to your organization. For more information on quotes, see *Applications Administration Guide*.
Line Items	Displays the products that are part of a particular quote.
Personal Bill To/Ship To	Displays billing and shipping addresses for a contact associated with a particular quote.
Terms and Totals	Displays the terms and totals related to the particular quote.
Vehicles	Displays any vehicles that have been allocated to a quote.

Business Scenario

This scenario is an example of a workflow performed by the administrator and end user. Your company may follow a different workflow according to its business requirements.

A sales representative at a dealership is asked to provide quotes for three vehicles for a potential customer. She first sets the price list for the quotes, and then adds the quote. After associating the first quote with the potential customer (opportunity), she copies it twice and revises the copied quotes for the second and third quotes.

With all three quotes created and associated with the opportunity, the sales representative shares the quote with the customer. A day later, the customer calls back expressing interest in one of the vehicles. The sales representative allocates the vehicle, holding it while the customer makes a purchasing decision.

Quotes Workflow

Figure 14 illustrates the end-user workflow for working with quotes.

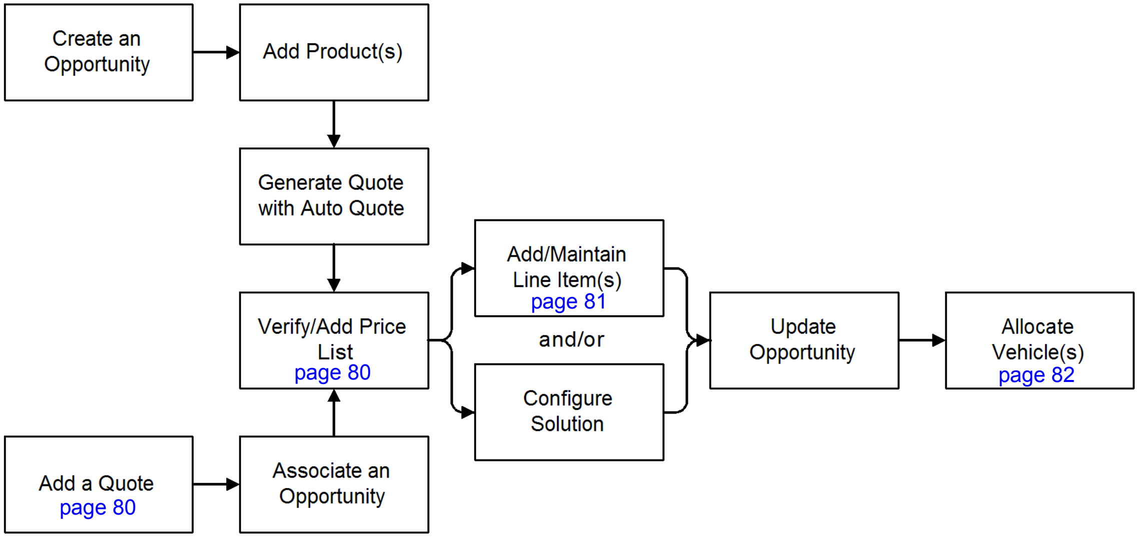

Create an Opportunity
Add Product(s)
Generate Quote with Auto Quote
Verify/Add Price List page 80
Add/Maintain Line Item(s) page 81
and/or
Configure Solution
Update Opportunity
Allocate Vehicle(s) page 82
Add a Quote page 80
Associate an Opportunity

Figure 14. Quotes Workflow

NOTE: For information about procedures not covered in this book, such as creating an opportunity and adding products, see *Siebel Call Center User Guide*.

End-User Procedures

This section describes the following quote procedures for end users:

- "Setting the Price List for Quotes"
- "Creating Quotes"
- "Copying or Revising a Quote" on page 81
- "Allocating Vehicles to a Quote" on page 82

Setting the Price List for Quotes

Before creating a quote, end users can set the default price list that will be used in the quote process.

To set a default price list

1. From the application-level menu, choose View > User Preferences.
2. Click the Price List and Sales Methodology tab.
3. In the Price List field, click the field control button.
4. Select the price list that will be used as a default for the Quotes screen, and then click OK.
5. If needed, select a sales methodology from the Sales Methodology drop-down list.

Creating Quotes

New quotes are created on the Quotes screen of Siebel eAutomotive.

To create a new quote

1. Navigate to the Quotes screen.
2. From the Show drop-down list, select My Quotes.
3. In the Quotes list, click the menu button and choose Add New Record.
4. Complete the fields as needed.
5. To enter or change address and terms information, click the Terms and Totals tab.

Copying or Revising a Quote

If the end user's original quote is not accepted by the customer, she can create a revised version by clicking Revise on the My Quotes or the My Team's Quotes view.

NOTE: The user can use the Quote screen to create a new opportunity associated with an existing or new account.

The user cannot use the Quotes screen to edit any existing opportunity or account.

The user cannot change the association between any existing opportunity and account, but the user can associate a different opportunity or account with the quote.

To copy or revise a quote

1. To create a new quote based on an existing quote, select the record to be copied from the Quotes list.
2. Click the menu button and select Copy Record.

   This action generates a new quote number for the new quote. All appropriate data is copied to the new record except for the Name, Created, and Quote Number fields. The quote Number is assigned automatically, the Name is left blank, and the Created date changes to today's date. The Revision field has a value of 1; the Price List reflects the selection made on the Quote tab of the Options dialog box and copies all line items.
3. Click Revise to create a copy of the selected quote.

   All appropriate data is copied to the new record, including the Name and Quote Number fields, excluding the Created and Revision fields. This keeps the same quote number, increases the number in the Revision field, deactivates the previous revision, copies all line items and the price list, and sets the status to the first status value (usually In Progress). The Date field reflects today's date.

   NOTE: The first version remains inactive and remains for historical tracking, but the user can mark the previous version as Active and then revise it.

Allocating Vehicles to a Quote

The end user can allocate a vehicle from dealer inventory to reserve it for a specific customer opportunity.

NOTE: For a vehicle to be allocated to a quote, the Status field for that vehicle should be Available.

To allocate vehicles to a quote

1. Navigate to the Quotes screen.
2. In the Quotes list, select the quote.
3. Click the Vehicles view tab.
4. Create a quote line item by selecting the product upon which the vehicle is based.
5. In the Vehicles list, click the menu button and select Add New Record.
6. Click the select button on the VIN# field.

   The Pick Vehicle dialog box displays all vehicles whose product matches the Product field of the line item selected in the Line Items list, that have a Status of Available, and that are in the same organization as that of the user.

   NOTE: Allocating a vehicle to a quote changes the status of the vehicle to Allocated. Deleting a vehicle from a quote changes the status of the vehicle to Available.

7. Select a vehicle, and then click OK to allocate this vehicle to the quote.

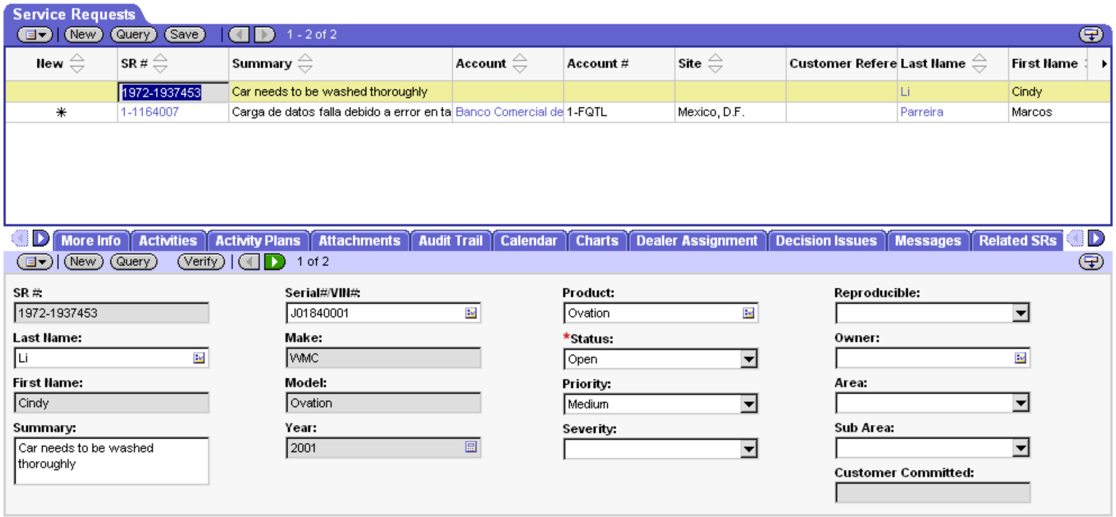
Working with Service Requests 10

A service request is a customer request for information about or assistance with products or services bought from a company. Service request records track customer requests and accompanying responses and are the central data object for managing potentially complex service issues to rapid, consistent, and correct resolution.

Service Requests permit end users to create, assign, and manage customer service issues. They provide quick access to the customer's assets, profile, open issues, related product issues, and service agreement information. Each Service Request can include short and extended descriptions of the problem, problem categories, levels of severity and priority, and status tracking with the opening and closing date and time. Each service request can also include many important details such as related activities, related attachments, and relevant solutions.

Service Requests Screen

Figure 15 displays the main features of the Service Requests screen. In Siebel eAutomotive, the availability of certain views and functionality can be limited according to each user's responsibilities. As a result, the views that appear may vary from those shown in Figure 1 and described in Table 10 on page 85.


Service Requests
New
Query
Save
1 - 2 of 2
More Info
Activities
Activity Plans
Attachments
Audit Trail
Calendar
Charts
Dealer Assignment
Decision Issues
Messages
Related SRs
New
Query
Verify
1 of 2

New	SR #	Summary	Account	Account #	Site	Customer Refere	Last Name	First Name
	1972-1937453	Car needs to be washed thoroughly					Li	Cindy
*	1-1164007	Carga de datos falla debido a error en ta	Banco Comercial de	1-FQTL	Mexico, D.F.		Parreira	Marcos

SR #: 1972-1937453
Last Name: Li
First Name: Cindy
Summary: Car needs to be washed thoroughly
Serial#/VIN#: J01840001
Make: WMC
Model: Ovation
Year: 2001
Product: Ovation
*Status: Open
Priority: Medium
Severity:
Reproducible:
Owner:
Area:
Sub Area:
Customer Committed:

Figure 15. The Service Requests Screen

Service Requests Screen Views

Table 10 describes the functions of the views specific to the Service Requests screen.

NOTE: For views not specific to service requests, see Table 1 on page 17.

Table 10. Service Requests Views

View	Comments
My Service Requests	Displays all service requests assigned to end users.
My Team’s Service Requests	Displays service requests assigned to end users’ direct reports.
All Service Requests	Displays a list of all service requests within end users’ organization.
All Service Requests Across Organizations	Displays all service requests across the entire list of organizations.
Explorer	Displays service requests in an Explorer view.
Dealer Assignment	Allows end users to assign a service request to a dealer or set up an appointment time with a dealer. For information about sharing information with dealers, see *Siebel eDealer Administration Guide*.
Decision Issues	Displays information about various problems and how to explain them to customers.
Related SRs	Displays a list of service requests that are similar to the current service request.
Services to be Performed	Allows end user to categorize services needed and define the type of service.
Solutions	Displays a list of Frequently-Asked Questions (FAQ).
Survey	Allows end users to take a customer satisfaction survey.

Business Scenario

A customer calls a call center to report a vehicle that will not release its emergency brake. The service representative opens a new service request, enters the customer and product information, and records the customer’s description of the problem. The application associates key information with the service request, which gives the representative access to the customer’s profile.

The service representative assigns the service request to a dealer, who works to fix the request.

Service Requests Workflows

The tasks to process a service request are typically performed by call center representatives or customer service representatives.

The following is an example of a typical service request workflow.

1. **Receive Incoming Call**. A customer calls to report that he or she is having a problem with your product or service. This information can also be entered in Siebel eService.
2. **Receive/Open Request.** The representative opens a service request, enters or verifies customer and vehicle information, and records a description of the problem.
3. **Assign the Request.** When a representative is unable to resolve the problem over the phone, that representative can route the service request to other representatives or a dealer who has more expertise.

End-User Procedures

Service requests vary in difficulty, type of resolution, and impact on the organization. The typical service request cycle involves initiating a service request, resolving the customer service issue, and then tracking and analyzing the requests for process improvements which can benefit the organization by avoiding or quickening the resolution of future service issues.

The following sections describe some of the most common dealer procedures end users will perform.

- "Creating a New Service Request"
- "Manually Assigning the Service Request" on page 88
- "Assigning with Assignment Manager" on page 89
- "Using Dealer Assignment" on page 89
- "Providing Details of Services to be Performed" on page 90
- "Researching and Resolving a Service Request" on page 91

Creating a New Service Request

Depending on how an organization is structured, representatives can receive a service request through many different channels. These channels may include:

- Direct telephone calls, often routed to the representative through an Automated Call Distributor (ACD)
- Email requests
- Internet requests logged automatically by customers over the Internet
- Customer walking into a service center

For new service issues, it will be necessary to enter a service request directly from the Service screen.

To create a service request

1. Navigate to the Service screen.
2. From the Show drop-down list, select My Service Requests.
3. In the Service Requests list, click New.
4. Complete the fields as needed.

NOTE: Information about the service request can also be entered on the More Info form.

Manually Assigning the Service Request

A service request is assigned to a representative after the details have been entered, and it has been determined that the issue cannot be resolved by the receiving representative. Service requests can be assigned to a dealer or a service center with more capacity or expertise to resolve the particular service issue.

To assign a service request manually

1. Navigate to the Service Requests screen.
2. From the Show drop-down list, select All Service Requests.
3. In the Service Requests list, select the service request to be assigned.
4. Click the More Info view tab.
5. In the Owner field, click the select button.
6. In the Pick Service Request Owner dialog box, select the person to whom you want to assign the request, and then click OK.

Assigning with Assignment Manager

The assign with assistance method requires a representative to use Assignment Manager. Assignment Manager automatically designates a customer service representative or call center agent based on skill level and availability.

To assign a service request with assistance

1. Navigate to the Service Requests screen.
2. From the Show drop-down list, select All Service Requests.
3. In the Service Requests list, select the service request you want to assign.
4. Click the More Info view tab.
5. In the More Info form, click the menu button, and then click Assign.

NOTE: The system either automatically assigns the service request to a representative or presents a list of potential assignees based on skills and other rating criteria. If presented with a list of eligible assignees, select one and close the assignment window.

Using Dealer Assignment

A representative can automatically assign a service request to a dealer or set up an appointment time with a dealer to deal with a service request.

To use Dealer Assignment

1. Navigate to the Service Requests screen.
2. Select the service request that needs to be assigned.
3. Click the Dealer Assignment view tab.

4. To assign the service request, select one of the following options from the Automatically Assign Service Request to a Dealer drop-down list:
   - Preferred Service Dealer
   - Selling Dealer

   NOTE: For a service request to be assigned to either of the above two values, the two values should have been set for the vehicle. For more information about setting values for a vehicle, see "Editing a Vehicle Record" on page 43.

   ---

5. To manually pick the dealer to assign this service request, click Pick a Dealer select button and select the dealer from the Pick Service Center dialog box.
6. To set an appointment, click New in the Appointment Time form and enter the time and date of the appointment.

Providing Details of Services to be Performed

A representative can record details of services to be performed for this service request.

To provide details of services to be performed

1. Navigate to the Service screen.
2. Select the service request for which a service is needed.
3. Click the Services to be Performed view tab.
4. Click New.
5. Complete the fields as needed.

NOTE: The options in the Service Type drop-down list are dependent on what you select in the Category drop-down list.

Researching and Resolving a Service Request

Often a representative will be able to resolve an open service request based on solutions that exist in the system. In this case, the appropriate solution is attached to the service request for reference and is used by other representatives in resolving similar service issues in the future.

To research and resolve a service request

1. Navigate to the Service Requests screen.
2. Select the service request you want to resolve.
3. To view related service requests, click the Related SRs tab to see if the problem has been solved before.

   NOTE: You can also view additional information on the Decisions Issues tab.

4. If you find a relevant service request, attach it to the current service request by using the Attach button.
5. If a solution is still needed, perform a full knowledge search and attach any relevant solutions to the current service request.
6. From the Status drop-down list, select Closed.

   NOTE: When selecting Closed, the system automatically sets the Sub Status field to Resolved and populates the current date and time in the Closed field.

Tracking Service History 11

The Service History screen displays information about the types of services and repairs done on a specific vehicle.

Benefits of Tracking Services and Repairs

Keeping track of all services and repairs performed on a vehicle will benefit all three parties in the automotive industry:

- Customers can track what is happening with their vehicle. Customers can also track the costs of repairs and service for their vehicles, which is also helpful when selling the vehicle. Having a track record of services and repairs performed on the vehicle will make it easier to sell the vehicle, hopefully earning a premium on the price if the vehicle hasn't had major problems.

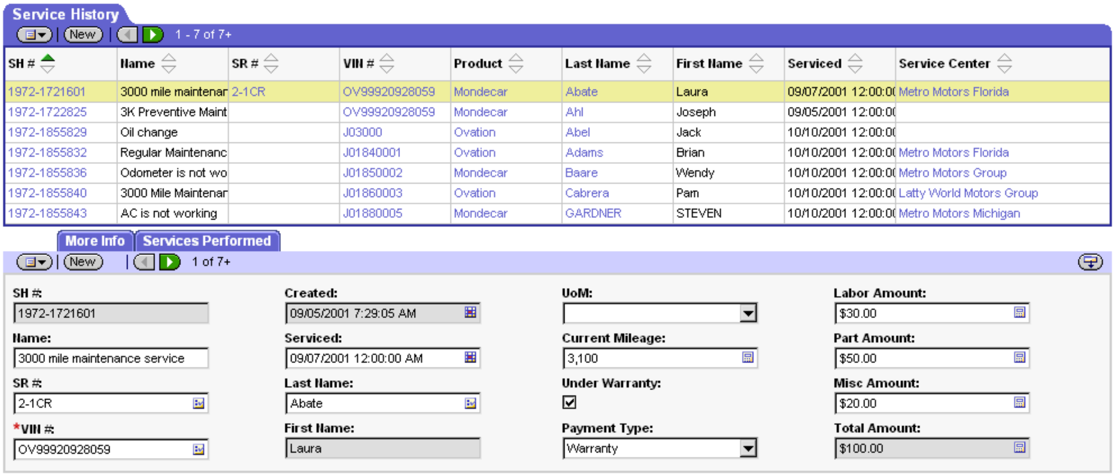
  NOTE: For a customer, Service Request and Service History are two completely separate entities. Customers use a Service Request to request an action, such as a repair, and they use the Service History to track all past services and repairs on their vehicles. Customers can also see their service history in their eService portal.

- Manufacturers (OEMs) can keep track of all services that customers have done on their vehicles. This gives the OEM information about vehicle quality and the service patterns of customers. Also, when customers come to their Web site to track their service and repair history, it provides an opportunity for OEMs to market their products to customers.
- Dealers, like OEMs, can be aware of the service and repair patterns of customers. Also, dealers will know the history of all services performed on a customer’s vehicle when the customer walks into the dealership. This helps dealers service the customer better.

  NOTE: Dealers report their service transactions to the manufacturers using proprietary interfaces. The manufacturers load that data into Siebel eAutomotive using EIM. That data can be used by manufacturers who create targeted marketing campaigns and also for personalized interactions.

Service History Screen

Figure 16 displays the main features of the Service History screen. In Siebel eAutomotive, the availability of certain views and functionality can be limited according to each user's responsibilities. As a result, the views that appear may vary from those shown in Figure 16.



SH #	Name	SR #	VIN #	Product	Last Name	First Name	Serviced	Service Center
1972-1721601	3000 mile maintenar	2-1CR	OV99920928059	Mondecar	Abate	Laura	09/07/2001 12:00:0	Metro Motors Florida
1972-1722825	3K Preventive Maint		OV99920928059	Mondecar	Ahl	Joseph	09/05/2001 12:00:0	
1972-1855829	Oil change		J03000	Ovation	Abel	Jack	10/10/2001 12:00:0	
1972-1855832	Regular Maintenanc		J01840001	Ovation	Adams	Brian	10/10/2001 12:00:0	Metro Motors Florida
1972-1855836	Odometer is not wo		J01850002	Mondecar	Baare	Wendy	10/10/2001 12:00:0	Metro Motors Group
1972-1855840	3000 Mile Maintenar		J01860003	Ovation	Cabrera	Pam	10/10/2001 12:00:0	Latty World Motors Group
1972-1855843	AC is not working		J01880005	Mondecar	GARDNER	STEVEN	10/10/2001 12:00:0	Metro Motors Michigan

SH #: 1972-1721601
Name: 3000 mile maintenance service
SR #: 2-1CR
*VIN #: OV99920928059
Created: 09/05/2001 7:29:05 AM
Serviced: 09/07/2001 12:00:00 AM
Last Name: Abate
First Name: Laura
UoM:
Current Mileage: 3,100
Under Warranty: ☑
Payment Type: Warranty
Labor Amount: $30.00
Part Amount: $50.00
Misc Amount: $20.00
Total Amount: $100.00

Figure 16. Service History Screen

Business Scenario

This section provides scenarios for service history. The order in which the procedures are performed may vary based on the business practices of the end user's company.

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 eAutomotive using EIM.

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.

A customer buys a vehicle from World Motors and sets up a maintenance plan with the dealership. After 1,500 miles, the customer schedules an oil change with the dealership's service department.

After the oil change, the dealership logs the service, and the information is shared with the manufacturer. The dealer is aware of all services performed on the vehicle, and the next time the customer comes to his Web site to track his service and repair history, the manufacturer is able to market other products to him.

End-User Procedures

Car dealerships (dealers) use the Service History screen to create a new service history record after a vehicle has been serviced. They can also use the Service History screen to view a list of all services performed on a vehicle.

This section describes the following sales history procedures for end users:

- "Creating a New Service History Record"
- "Viewing or Adding Services Performed" on page 98
- "Viewing Service History" on page 98

Creating a New Service History Record

A dealer or an OEM can add a new service history record.

To create a service history record

1. Navigate to the Service History screen.
2. In the Service History list, click New.
3. Complete the fields, including those described below, as needed.

Field	**Description**
SH #	Service history number, automatically populated by the system.
SR #	Select the related Service Request, if needed.
VIN #	Select a vehicle from the Pick Vehicle dialog box.
UoM	Unit of Measure; select Miles or Kilometers.
Payment Type	Select from Customer Pay, Goodwill, or Warranty.

Viewing or Adding Services Performed

To view or add services performed

1. Navigate to the Service History screen.
2. In the Service History list, select a service history record.
3. Click the Services Performed view tab.
4. To add a service to the list, click New, and then complete the fields as needed.

NOTE: In the Category field, the options are Preventive Maintenance, Repair, or Other. The choices in the Service Type drop-down list are determined by the option selected in the Category field.

Viewing Service History

The Service History screen contains a list of all the service transactions.

To view service history

1. Navigate to the Service History screen.
2. In the Service History list, select a service history record.
3. To view the service history record for a particular vehicle, navigate to the Vehicles screen and click the Service History view tab for that vehicle. New service history can also be added from this view.
4. To view the service history record for a particular contact, navigate to the Contact screen and click the Service History view tab for that contact. New service history can also be added from this view.

Tracking Sales History 12

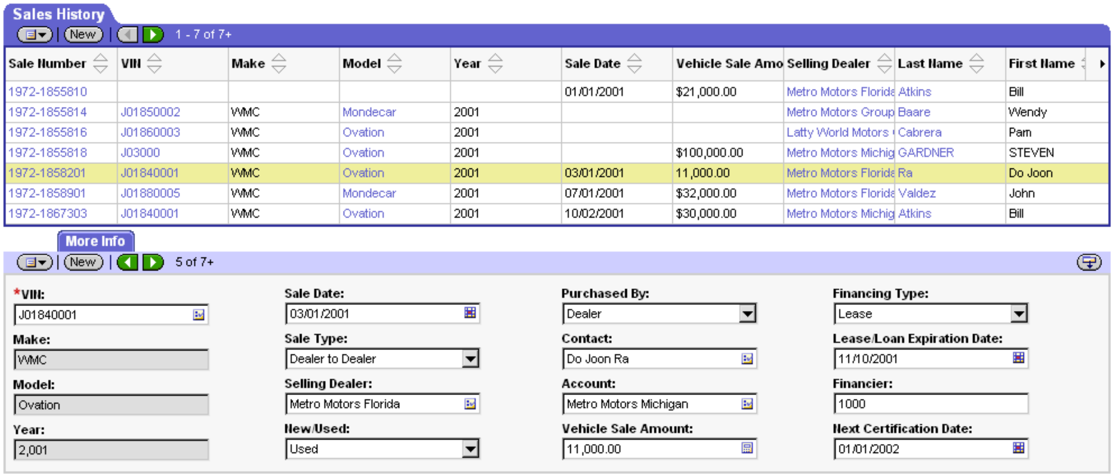
In the automotive industry, the automobile manufacturers sell vehicles to the dealers. In turn, the dealers sell vehicles to the consumers. The manufacturer sells the vehicle to the dealer at a certain price (Dealer Invoice) and suggests a retail price (Manufacturer Suggested Retail Price or MSRP) for the vehicle. As a result, the dealer's profit is the difference between MSRP and Dealer Invoice.

Dealers report their sales transactions to the manufacturers using proprietary interfaces. That data can be used by manufacturers who create targeted marketing campaigns and also for personalized interactions. The manufacturers load that data into Siebel eAutomotive using Enterprise Integration Manager (EIM).

Dealers need to periodically report back sales of all new vehicles to the manufacturer using a batch mode interface called Dealer Communication Systems (DCS). The information dealers provide to the manufacturers varies from dealer to dealer. In some cases, dealers may only provide the Vehicle Identification Number (VIN) of the vehicle sold, along with a contact name and address. However, in some cases, dealers may additionally provide the price at which the vehicle was sold along with the VIN, contact name, and address.

Sales History Screen

Figure 17 displays the main features of the Sales History screen. In Siebel eAutomotive, the availability of certain views and functionality can be limited according to each user's responsibilities. As a result, the views that appear may vary from those shown in Figure 17.



Sale Number	VIN	Make	Model	Year	Sale Date	Vehicle Sale Amo	Selling Dealer	Last Name	First Name
1972-1855810					01/01/2001	$21,000.00	Metro Motors Florida	Atkins	Bill
1972-1855814	J01850002	WMC	Mondecar	2001			Metro Motors Group	Baare	Wendy
1972-1855816	J01860003	WMC	Ovation	2001			Latty World Motors	Cabrera	Pam
1972-1855818	J03000	WMC	Ovation	2001		$100,000.00	Metro Motors Michig	GARDNER	STEVEN
1972-1858201	J01840001	WMC	Ovation	2001	03/01/2001	11,000.00	Metro Motors Florida	Ra	Do Joon
1972-1858901	J01880005	WMC	Mondecar	2001	07/01/2001	$32,000.00	Metro Motors Florida	Valdez	John
1972-1867303	J01840001	WMC	Ovation	2001	10/02/2001	$30,000.00	Metro Motors Michig	Atkins	Bill

*VIN:	J01840001	Sale Date:	03/01/2001	Purchased By:	Dealer	Financing Type:	Lease
Make:	WMC	Sale Type:	Dealer to Dealer	Contact:	Do Joon Ra	Lease/Loan Expiration Date:	11/10/2001
Model:	Ovation	Selling Dealer:	Metro Motors Florida	Account:	Metro Motors Michigan	Financier:	1000
Year:	2,001	New/Used:	Used	Vehicle Sale Amount:	11,000.00	Next Certification Date:	01/01/2002

Figure 17. Sales History Screen

Business Scenario

This section provides scenarios for sales history. The order in which the procedures are performed may vary based on the business practices of the end user's company.

Siebel eAutomotive 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 eAutomotive using Siebel's Enterprise Integration Manager (EIM).

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.

End-User Procedures

Car dealerships (dealers) are end users of the Sales History tab. Dealers can use the Sales History screen to create a new sales history record after the sale of a vehicle, and the dealers can also use the Sales History screen to view the sales history for their dealership.

This section describes the following sales history procedures for end users:

- "Creating a New Sales History Record"
- "Viewing Sales History" on page 103

NOTE: OEMs can also use this data to create targeted campaigns and personalize customer interactions.

Creating a New Sales History Record

A dealer can add a new sales history record, though most sales history records will be added to Siebel eAutomotive through EIM.

To create a sales history record

1. Navigate to the Sales History tab.
2. In the Sales History list, click New.
3. Complete the fields, including those described below.

Field	Description
VIN	Select a vehicle from the Pick Vehicle dialog box.
Purchased By	Select the type of consumer from the drop-down list; choices are Business, Company Car, Consumer, Dealer, Distributor, Fleet, Multiple.
Contact	Select the contact who purchased the vehicle.
Account	Select the account or dealer who purchased the vehicle.
Next Certification Date	Next date for testing the road-worthiness of the vehicle.

Viewing Sales History

The Sales History screen contains a list of all sales transactions.

To view sales history

1. Navigate to the Sales History screen.
2. In the Sales History list, select a sales history record.
3. To view the sales history record for a particular vehicle, navigate to the Vehicles screen and click the Sales History view tab for that vehicle.
4. To view the sales history record for a particular contact, navigate to the Contact screen and click the Sales History view tab for that contact.

Setting Up Preventive Maintenance 13

This chapter provides information about standard Siebel eAutomotive functionality for preventive maintenance. Your company's application configuration and business processes may differ from the procedures or business scenarios presented in the following sections.

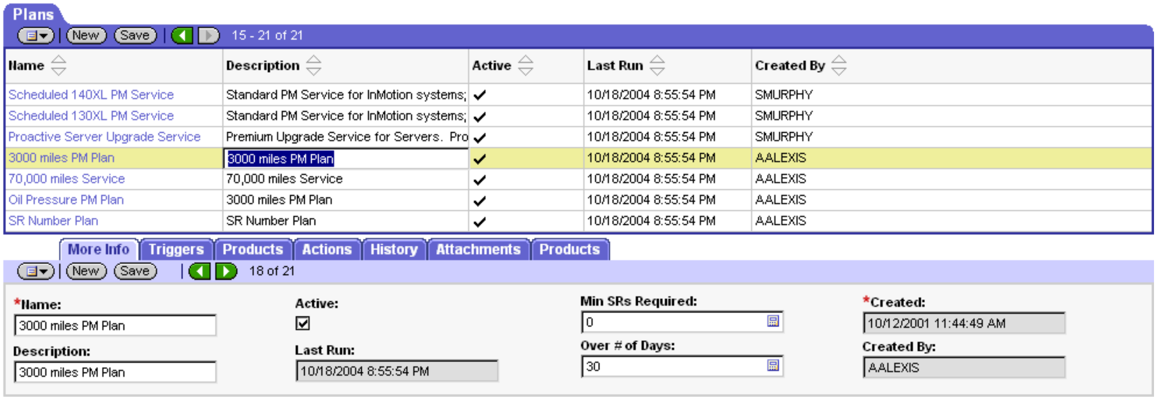
Application administrators and end users, including service and support center representatives, will manage preventive maintenance procedures frequently in Siebel eAutomotive.

The preventive maintenance engine can automatically generate service requests and activities based on triggers set up for mileage, time intervals, or threshold events.

NOTE: This chapter is an introduction to preventive maintenance for Siebel eAutomotive. For more information on preventive maintenance and the preventive maintenance engine, see *Siebel Field Service Guide*.

Preventive Maintenance Screen

Figure 18 displays the main features of the Preventive Maintenance (PM) screen. In Siebel eAutomotive, the availability of certain views and functionality can be limited according to each user's responsibilities. As a result, the views that appear may vary from those shown in Figure 18 and described in Table 11.



Name	Description	Active	Last Run	Created By
Scheduled 140XL PM Service	Standard PM Service for InMotion systems;	✓	10/18/2004 8:55:54 PM	SMURPHY
Scheduled 130XL PM Service	Standard PM Service for InMotion systems;	✓	10/18/2004 8:55:54 PM	SMURPHY
Proactive Server Upgrade Service	Premium Upgrade Service for Servers. Pro	✓	10/18/2004 8:55:54 PM	SMURPHY
3000 miles PM Plan	3000 miles PM Plan	✓	10/18/2004 8:55:54 PM	AALEXIS
70,000 miles Service	70,000 miles Service	✓	10/18/2004 8:55:54 PM	AALEXIS
Oil Pressure PM Plan	3000 miles PM Plan	✓	10/18/2004 8:55:54 PM	AALEXIS
SR Number Plan	SR Number Plan	✓	10/18/2004 8:55:54 PM	AALEXIS

*Name: 3000 miles PM Plan

Description: 3000 miles PM Plan

Active: ☑

Last Run: 10/18/2004 8:55:54 PM

Min SRs Required: 0

Over # of Days: 30

*Created: 10/12/2001 11:44:49 AM

Created By: AALEXIS

Figure 18. **Preventive Maintenance Screen**

Preventative Maintenance Screen Views

Table 11 describes the views specific to the Preventive Maintenance screen.

Table 11. **Preventive Maintenance Views**

Fields	Description
Triggers	Displays time interval, usage, threshold, and event forms associated with the PM plan.
Products	Displays products and vehicles associated with the PM plan.
Actions	Displays lists of activities and service requests (SRs) associated with the PM plan.
History	Displays a list of historical, scheduled actions associated with the PM plan.
Attachments	Displays any file attachments that are associated with a PM plan.

Business Scenarios

This section provides scenarios for business-to-consumer preventive maintenance. The order in which the procedures are performed may vary based on the business practices of the end user's company.

There are two types of preventive maintenance (PM) plans that can be used to generate PM actions: periodic and triggered maintenance.

Periodic Maintenance

Periodic maintenance is recommended by the manufacturer and is known in advance of the scheduled event.

The Alliance dealership sold a 2000 Ovation to a customer a few months ago. Based on the common driving habits, the dealership has set up calculations to determine the average mileage of a customer during a time period. Once the time period elapses, the Siebel eAutomotive PM engine automatically creates a PM action and generates an activity and a service request. The activity reminds the dealership to call the new customer and schedule an appointment for the recommended service. This scenario provides the dealership with an opportunity to gain revenue from the ongoing service associated with the vehicle.

Triggered Maintenance

Maintenance can be triggered based on data received from the vehicle. For example, if the vehicle's oil pressure drops below a specified level, Siebel eAutomotive can generate a PM action to notify the customer to take the vehicle to the dealer for service.

The new customer's Ovation uses Telematics to monitor odometer reading, oil pressure, coolant temperature, and other vehicle readings. Using wireless technology, the dealership receives information that the Ovation has low oil pressure, then Siebel eAutomotive uses the trigger to create a PM action. The dealership notifies the customer by telephone or email to bring the vehicle in for maintenance.

Preventive Maintenance Workflow

Figure 19 displays an example of two workflows, one performed by the administrator and one performed by the end user.

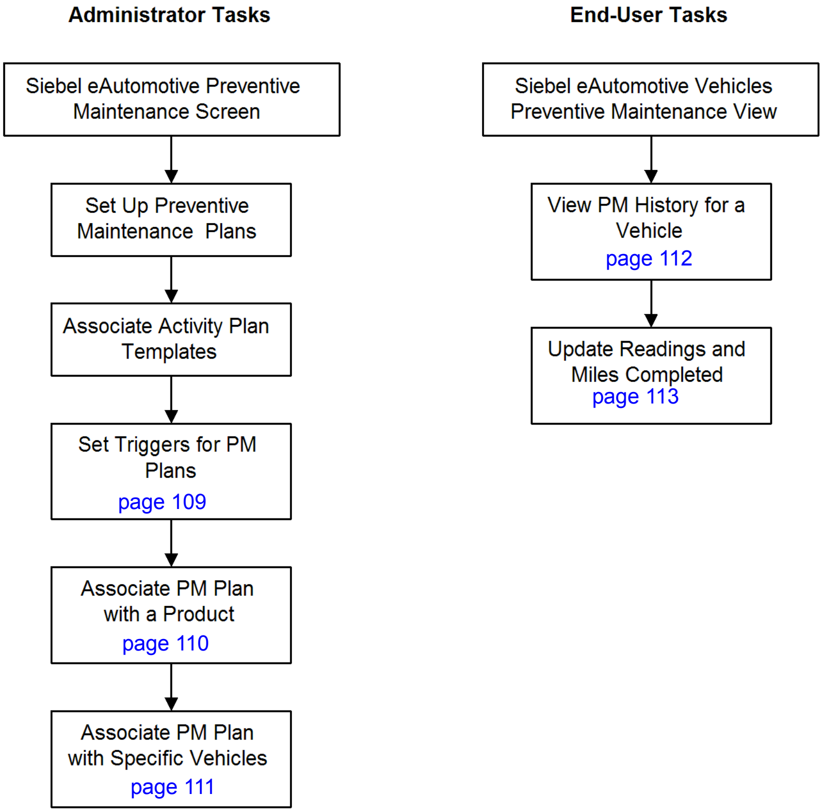

Administrator Tasks
End-User Tasks
Siebel eAutomotive Preventive Maintenance Screen
Set Up Preventive Maintenance Plans
Associate Activity Plan Templates
Set Triggers for PM Plans
page 109
Associate PM Plan with a Product
page 110
Associate PM Plan with Specific Vehicles
page 111
Siebel eAutomotive Vehicles Preventive Maintenance View
View PM History for a Vehicle
page 112
Update Readings and Miles Completed
page 113

Figure 19. Preventive Maintenance Workflow

NOTE: For information about procedures not covered in this book, such as associating templates and setting up PM plans, see *Siebel Field Service Guide*.

Administrator Procedures

You can use the Preventive Maintenance screen to set up PM plans, define PM plan triggers, associate a PM plan with a product and vehicles, and assign actions for a PM plan.

The following sections describe some of the most common PM procedures you will perform.

- "Setting a Trigger for a PM Plan"
- "Associating a PM Plan with a Product" on page 110
- "Associating a PM Plan with Vehicles" on page 111

NOTE: For information on how to set up the PM engine parameters and a PM plan, see *Siebel Field Service Guide*.

Setting a Trigger for a PM Plan

After a PM plan has been set up and the appropriate service request templates and activity templates have been defined, you can set the trigger for a PM plan, which defines the type of plan and how the service interval is determined in Siebel eAutomotive. The following procedure is based on a mileage trigger for maintenance.

To set a trigger for a PM plan

1. From the application-level menu, choose View > Site Map > Preventive Maintenance > Preventive Maintenance.
2. In the Plans list, select a PM plan.
3. Click the Triggers view tab.
4. To create new records in any of the views (Time Interval, Usage, Threshold, and Event), click New in that view.
5. Enter values for the required fields in the list or form.

   NOTE: PM plans can have any number of triggers of any type (Time Interval, Usage, Threshold, and Event).

Associating a PM Plan with a Product

After you define the PM plan triggers, you can associate it with a product you added. See Chapter 7, "Working with Products" for more information on using Products.

To associate a PM plan with a product

1. From the application-level menu, choose View > Site Map > Preventive Maintenance > Preventive Maintenance.
2. In the Plans list, select the plan with which you want to associate a product.
3. Click the Products view tab.
4. In the Products list, click New.
5. Complete the following fields as needed.

Field	Description
Product	Select the product from the Pick Product dialog box. The Part # field is automatically populated.
All Assets	Select the check box to associate all assets (vehicles) based on this product with the PM plan.
Description	Add extra information about the product as needed.

Associating a PM Plan with Vehicles

After you associate the PM plan with a product, you can associate it to a specific vehicle or vehicles. Once a PM plan is associated with a vehicle, you can run the PM engine to create preventive maintenance actions, activities, and service requests for the vehicle.

To associate a PM plan with a vehicle or vehicles

1. In the application-level menu, choose View > Site Map > Preventive Maintenance > Preventive Maintenance.
2. In the Plans list, select the PM plan with which you want to associate a vehicle.
3. Click the Products view tab.
4. In the Product list, select the product upon which the vehicle is based.
5. In the Vehicle list, click New.
6. Click the select button from the VIN # field and select the vehicle or vehicles to associate with this plan.

NOTE: This procedure can also be done through the Preventive Maintenance view of the Vehicles screen.

End-User Procedures

End users can view PM actions associated with a product or an individual vehicle. The Preventive Maintenance view tab displays a list of completed and planned maintenance actions for a vehicle.

The following sections describe some of the most common PM procedures the end user will perform.

- "Viewing PM History for a Vehicle"
- "Viewing and Adding PM Plans for a Vehicle" on page 113

NOTE: For additional end-user procedures related to preventive maintenance, see *Siebel Field Service Guide*.

Viewing PM History for a Vehicle

End users can view the preventive maintenance actions for a vehicle through the Preventive Maintenance tab of the Vehicles screen.

To view PM history for a vehicle

1. Navigate to the Vehicles screen.
2. In the Vehicles list, select the vehicle.
3. Click the Preventive Maintenance view tab.
4. From the Show drop-down list of the Preventive Maintenance form, select History.
5. When a PM action is completed, enter data in the Date Completed and Completed Reading fields.
6. To view more details about the preventive maintenance plan, click the hyperlink in the Plan Item Name field.

Viewing and Adding PM Plans for a Vehicle

End users can view and add preventive maintenance plans for a vehicle through the Preventive Maintenance tab of the Vehicles screen.

To update PM plans for a vehicle

1. Navigate to the Vehicles screen.
2. In the Vehicles list, select the vehicle.
3. Click the Preventive Maintenance view tab.
4. From the Show drop-down list of the Preventive Maintenance form, select Plan.
5. To add a new PM plan, click New, and then select a plan from the Pick PM Plans dialog box.

Working with Siebel eAutomotive Tools 14

This chapter covers how to set up and use three tools available for Siebel eAutomotive users:

- Dealer Locator
- Financial Calculator
- Vehicle Inventory Search

Administrator Procedures

You can control the settings for the Dealer Locator, which is used to find dealers near various end users. You can also add vehicles to the Vehicles screen so that the vehicles display in an Inventory Search.

This section describes the following eAutomotive Tools procedures for administrators:

- "Setting Up the Dealer Locator"
- "Setting Up the Vehicle Inventory Search" on page 117

Setting Up the Dealer Locator

Dealers are located based on the latitude and longitude specified in this section. Dealer locator needs to be set up before inventory search can work.

NOTE: Only one location should be added for each dealer. If there are multiple locations for one dealer, the inventory search may not function properly, because a vehicle is tied to a dealer, not to a dealer location.

To add a dealer to the Dealer Locator

1. From the application-level menu, open View > Site Map > Application Administration > Dealer Locator Administration.
2. Click New.
3. Complete the following fields as needed.

Field	Description
Dealer Location	Type a name for the dealer location.
Category	Select from Dealers, Service Centers, or All.
Business Hours	Type in the dealer hours.
Dealer	Select a dealer from the dialog box.

Field	Description
Latitude	Latitude number (0 to +/- 90; '+' for the Northern Hemisphere and '-' for the Southern Hemisphere).
Longitude	Longitude number (0 to +/- 180; '+' for the Eastern Hemisphere and '-' for the Western Hemisphere).
Address	Select a dealer address from the dialog box.
ZIP Code	Postal ZIP code in alphanumeric text.
City	Name of city.
State	Name of state or province. This field may be left empty as applicable to certain countries.
Country	Name of the country.

Setting Up the Vehicle Inventory Search

You must set up a vehicle in the Vehicle or Vehicle Admin screen before the vehicle will display in the inventory. As long as the Owned By, Account Name, and Status fields have been completed, the vehicle will display in the inventory. The vehicle can then be found using the Inventory Search feature.

NOTE: Dealer Locator must be set up before Inventory Search will work.

To add a vehicle to the inventory

1. From the application-level menu, choose View > Site Map > Vehicle Administration > Vehicle Administration.
2. Complete the following fields, along with any other fields as needed.

Field	Description
Owned By	Type of owner should be Dealer.
Account Name	Select the name of the dealer from the dialog box.
Status	The status should be Available.

End-User Procedures

End users can use the Siebel eAutomotive tools to calculate loans and leases, locate dealers, and search for a vehicle in inventory.

This section describes the following eAutomotive Tools procedures for end users:

- "Calculating Loans and Leases"
- "Locating a Dealer" on page 119
- "Searching for a Vehicle" on page 120

Calculating Loans and Leases

A loan and a lease can be calculated simultaneously from the same information.

End users use the Financial Calculator to calculate the monthly payment for a lease or loan, allowing a contact to compare leases with purchases, and loans of varying terms with each other. Much of the same information is required to calculate either a lease or a loan. Once that information has been entered, multiple calculations for leases and loans can be generated by changing the terms.

To calculate the lease and loan prices of a vehicle

1. Navigate to the Automotive Tools screen.
2. From the Show drop-down list, select Financial Calculator.
3. Complete the fields, and then click Calculate.

   Payment amounts appear in the Lease Monthly Payment and Loan Monthly Payment fields.

Locating a Dealer

End users can find dealers by the contact information for the dealer.

Mobile end users may find fewer dealers than end users on the network. This is because a subset of dealer records may be routed down to the local database during synchronization with the server database. Docking visibility rules, as selected by the administrator during set up of the mobile client, determine which dealer records are routed down. For more information, see *Siebel Remote and Replication Manager Administration Guide* and *Siebel Tools Reference*.

Mobile end users may find fewer dealers than end users on the network. This is because a subset of dealer records may be routed down to the local database during synchronization with the server database. Docking visibility rules, as selected by the administrator during set up of the mobile client, determine which dealer records are routed down. For more information, see *Siebel Remote and Replication Manager Administration Guide* and *Siebel Tools Reference*.

To locate a dealer

1. Navigate to the Automotive Tools screen.
2. From the Show drop-down list, select Dealer Locator.
3. Enter dealer information in the Dealer Locator form, and then click Search.

   Dealers matching the specified information appear in the Locator list.

NOTE: End users can also use the * wildcard character to enter partial City names and ZIP Codes to increase the number of dealers that the locator will find. For example, typing `Fern*` in the City field will match all cities with names that begin with Fern. Typing `9461*` in the ZIP Code field will match all ZIP codes that begin with 9461.

Searching for a Vehicle

End users can search for a vehicle in their area by entering their ZIP code or other search criteria.

To search for a vehicle in inventory

1. Navigate to the Automotive Tools screen.
2. From the Show drop-down list, select Vehicle Inventory Search.
3. Enter search criteria in the form as needed.
4. Click the Search.

   A list of vehicles matching the search criteria appears.

NOTE: To start a new search, click Reset.

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