



# **Siebel Automotive Guide**

Version 8.0 Rev A

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# 1

## What's New in This Release

### What's New in Siebel Automotive Guide, Version 8.0 Rev A

Table 1 lists changes described in this version of the documentation to support release 8.0 of the software.

Table 1. New Product Features in Siebel Automotive Guide, Version 8.0 Rev A

Topic	Description
<a href="#">Chapter 7, "Managing End of Lease and Remarketing Activities"</a>	Added information about new functionality for lease end activities, including integrating with third-party inspection vendors, scheduling inspection and return appointments, selling returned vehicles to dealers through the Web, auctioning returned vehicles, Web service reference, and workflow reference.

### What's New in Siebel Automotive Guide, Version 8.0

This guide has been updated to reflect product name changes.



# 2

## Siebel Automotive Overview

This chapter provides an overview of Oracle's Siebel Automotive, its product modules, and options. It consists of the following topics:

- "About Siebel Automotive" on page 13
- "Product Modules and Options" on page 13

### About Siebel Automotive

Siebel Automotive is a front-office automation application specifically designed for the automotive industry. Using Siebel Automotive, 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 while customers configure vehicle orders online, at the dealership, or with a fleet sales representative.

Siebel Automotive 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 Automotive provides several modules and options, as shown in [Table 2](#).

Table 2. Product Modules and Options

Option	Description
Data Modeling	<p>Represents the entities and relationships involved in a selling model that includes a franchised distribution channel and complex product ownership and service linkages.</p> <p>The basic data model allows call center, marketing, sales, and service capability within Siebel Automotive. The vehicles industry does not fall neatly into business-to-business or business-to-consumer selling.</p> <p>Siebel Automotive 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.</p>
Multi-Channel Communication	<p>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.</p>

Table 2. Product Modules and Options

Option	Description
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 promote satisfaction, drive service revenues, and understand needs for subsequent vehicle purchases.

# 3

## Associating Vehicles with Accounts

This chapter provides information about standard Siebel Automotive functionality for account management. It includes the following topics:

- [“Accounts Defined” on page 15](#)
- [“Scenarios for Working with Automotive Accounts” on page 15](#)
- [“Accounts Process Workflow” on page 16](#)
- [“Account Setup Using Siebel Automotive” on page 16](#)
- [“Process of Using Automotive for Account Management” on page 18](#)
- [“Associating a Vehicle with an Account” on page 18](#)
- [“Associating a Vehicle with an Account by Relationship” on page 19](#)

Application administrators and end users can use the concepts and procedures in this chapter to manage accounts in their daily job roles. Your company's application configuration and business processes may differ from the procedures or business scenarios that are presented.

### Accounts Defined

Accounts represent companies or individuals with which your company conducts business. Use the Accounts screen to manage information associated with accounts.

### Scenarios for Working with Automotive Accounts

This topic 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

A corporation purchases a fleet of vehicles from a large motor vehicle dealership. A fleet sales manager for the vehicle dealership creates an account for the corporation and then creates a vehicle record associated with the account for each of the fleet vehicles.

[“Associating a Vehicle with an Account” on page 18.](#)

### Vehicle-Relationship Scenario

A sales representative from a dealership sells a vehicle to a customer, who is a contact the representative created from a walk-in at the showroom several weeks ago. The vehicle dealership is the loan provider for the vehicle that the customer purchased. The vehicle is associated with the dealership account through the Accounts list from the Vehicle Summary view tab.

**Related Topic**

[“Associating a Vehicle with an Account by Relationship” on page 19.](#)

## Accounts Process Workflow

Figure 1 illustrates the end-user workflow for working with accounts.

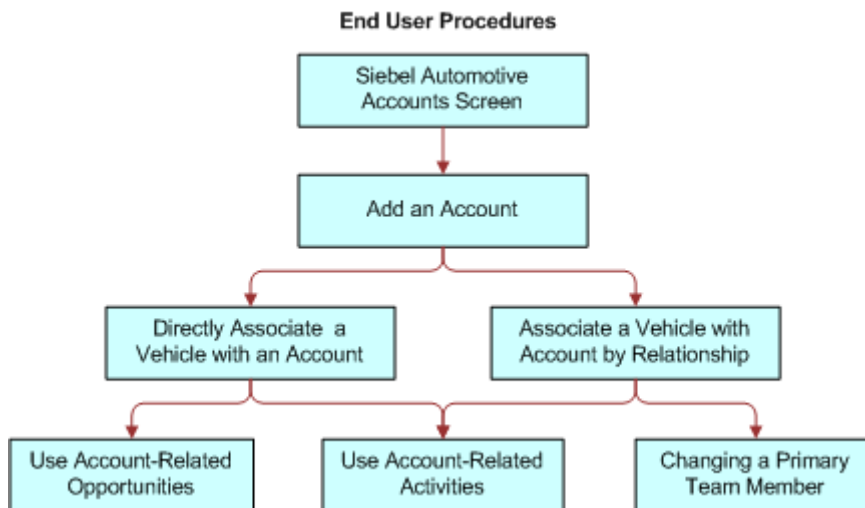


Figure 1. Accounts Workflow

**More Information**

For information about multi-organization and position visibility, see *Siebel Security Guide*.

## Account Setup Using Siebel Automotive

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

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



## 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 Automotive.

## Working with Abandoned Accounts

End users may abandon accounts instead of changing their status to inactive, as shown in [Table 3](#). Abandoned accounts may increase the time necessary to conduct searches, queries, and other calls to the database.

Table 3. Working with Abandoned Accounts

If...	Then...
Assignment Manager is being used	Accounts are transferred to new account team members during territory reassignments, attrition, and other organizational changes.
Assignment Manager is not being used	<p>You must:</p> <ul style="list-style-type: none"> <li>■ Conduct routine queries to make sure that accounts with no activity are marked as inactive.</li> <li>■ Make sure that all accounts have an active team or at least a primary team member assigned to the account.</li> </ul> <p>Otherwise, accounts that are abandoned do not appear in an end user's My Accounts list.</p>
The account is reactivated as an opportunity later	The historical activities and opportunities associated with that account is not available.

## About Querying for Abandoned Accounts

You can create queries to monitor accounts at intervals to make sure accounts have a primary team member. If you locate an abandoned account, 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.

## Process of Using Automotive for Account Management

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

After 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.

To manage their accounts, end users perform the following tasks:

- [“Associating a Vehicle with an Account” on page 18](#)
- [“Associating a Vehicle with an Account by Relationship” on page 19](#)
- [“Associating a Vehicle Using the Summary View” on page 20](#)

**NOTE:** For additional end-user procedures related to accounts, see *Siebel Applications Administration 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.

This task is a step in [“Process of Using Automotive for Account Management” on page 18](#).

### ***To associate a vehicle directly with an account***

- 1 Navigate to the Vehicles screen.
- 2 Drill down on the VIN field link for a selected vehicle record.
- 3 Scroll down to the Vehicles form.
- 4 In the Account field, select a financial account.

### **Related Topics**

- [“Associating a Vehicle with an Account by Relationship” on page 19](#)
- [“Associating a Vehicle Using the Summary View” on page 20](#)

# Associating a Vehicle with an Account by Relationship

Table 4 lists the relationship of associating a vehicle with an account and an account with one or more vehicles.

Table 4. Relationship of Associating a Vehicle With an Account

When...	Then...
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.
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.

The procedures in this topic describe how to associate a vehicle with an account or through a summary view.

Use this procedure to associate a vehicle with an account by relationship.

This task is a step in [“Process of Using Automotive for Account Management” on page 18](#)

## *To associate a vehicle with an account by relationship*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field link for a selected account record.
- 3 Click the Vehicles view tab.
- 4 Scroll down to the Related Vehicles list.
- 5 Create a new record and select a relationship.

### Related Topics

- [“Associating a Vehicle with an Account” on page 18](#)
- [“Associating a Vehicle Using the Summary View” on page 20](#)

## Associating a Vehicle Using the Summary View

The procedure in this topic describe how to associate a vehicle with an account using the Summary view.

This task is a step in [“Process of Using Automotive for Account Management” on page 18](#)

### *To associate a vehicle with an account*

- 1 Navigate to the Vehicles screen.
- 2 Drill down on the VIN field link for a selected vehicle record.
- 3 Click the Summary view tab.
- 4 Scroll down to the Account list, select a vehicle record, and set the relationship.

### Related Topics

- [“Associating a Vehicle with an Account” on page 18](#)
- [“Use this procedure to associate a vehicle with an account by relationship.” on page 19](#)

# 4

## Managing Contacts

This chapter provides information about standard Siebel Automotive functionality for contact management. It consists of the following topics:

- [“Contacts Defined” on page 21](#)
- [“Scenario for Working with Automotive Contacts” on page 21](#)
- [“Contacts Process” on page 22](#)
- [“Contact Record Relationships” on page 23](#)
- [“Process of Using Automotive to Work with Contacts” on page 23](#)
- [“Managing Relationships Between Contacts” on page 24](#)
- [“Associating a Vehicle with a Contact” on page 24](#)
- [“Viewing Service History and Sales History for a Contact” on page 25](#)
- [“Managing Service History Information” on page 26](#)

**NOTE:** Your company's application configuration and business processes may differ from the procedures or business scenarios presented in the following topics.

### Contacts Defined

In Siebel Automotive, 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.

### Scenario for Working with Automotive Contacts

This topic 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 Automotive 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 Process

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

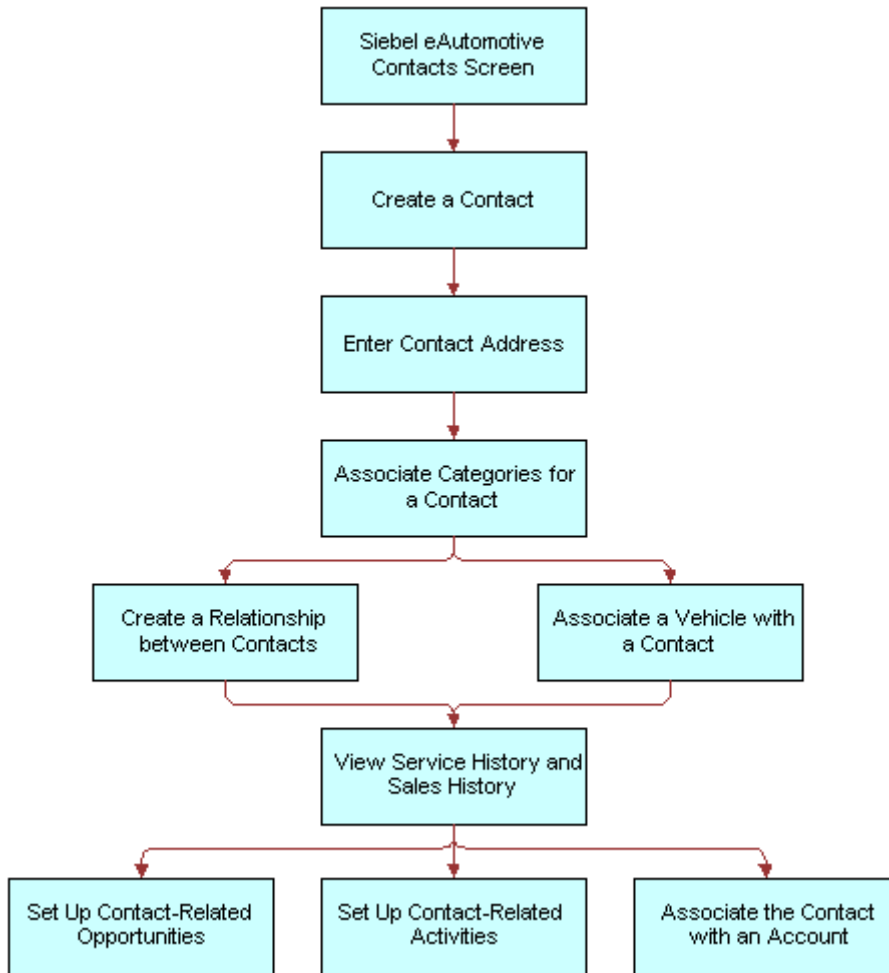


Figure 2. Contacts Workflow

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

## Contact Record Relationships

A contact record allows multiple associations between most objects. [Table 5](#) describes selected fields and their relationships to contacts.

Table 5. Selected Fields and Their Relationships to Contacts

Field	Description
Address	<p>More than one address may be specified for a contact. When the user selects 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.</p> <p>An address record may be shared between many contacts or many accounts. As a result, if you modify the address for a contact, it modifies the same address for other contacts and accounts that use this address record.</p>
Households	<p>A contact may be associated with more than one household.</p> <p>When the user selects 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.</p>
Contact Method	<p>This field allows an end user to indicate the contact's preferred method of communication by selecting it from the drop-down list.</p>

## Process of Using Automotive to Work with Contacts

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

To work with contacts in Siebel Automotive, end users perform the following tasks:

- [“Managing Relationships Between Contacts” on page 24](#)
- [“Associating a Vehicle with a Contact” on page 24](#)
- [“Viewing Service History and Sales History for a Contact” on page 25](#)

## Managing Relationships 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.

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

This task is a step in ["Process of Using Automotive to Work with Contacts"](#) on page 23.

### *To view, edit, create, and delete a relationship between contacts*

- 1 Navigate to the Contacts screen, then the Contacts List view.
- 2 Drill down on the Last Name field link for a selected contact record.
- 3 Click the Relationships view tab.
- 4 In the Relationships list, add, edit, or delete records.

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

### Related Topics

- ["Associating a Vehicle with a Contact"](#) on page 24
- ["Viewing Service History and Sales History for a Contact"](#) on page 25
- ["Managing Service History Information"](#) on page 26

## Associating a Vehicle with a Contact

Use this procedure to associate a vehicle with a contact in the Contacts screen. Associating a vehicle with a contact allows a dealer track an individual's vehicle ownership traits, such as make or model.

This task is a step in ["Process of Using Automotive to Work with Contacts"](#) on page 23.

### *To associate a vehicle with a contact*

- 1 Navigate to the Contacts screen, then the Contacts List view.
- 2 Drill down on the Last Name field link for a selected contact record.
- 3 Click the Vehicles view tab.
- 4 In the Vehicles list, add, edit, or delete records.

**NOTE:** Drill-down on the VIN and edit the fields on the Vehicles form to change the vehicle-related preferences for the contact.



**Related Topics**

- [“Managing Relationships Between Contacts” on page 24](#)
- [“Viewing Service History and Sales History for a Contact” on page 25](#)
- [“Managing Service History Information” on page 26](#)

## Viewing Service History and Sales History for a Contact

Use this procedure to display 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.

This task is a step in [“Process of Using Automotive to Work with Contacts” on page 23](#).

***To view sales and service history information for a contact***

- 1 Navigate to the Contacts screen, then the Contacts List view.
- 2 Select a contact record and take the following action:

To...	Drill down on the...
View sales history	<p>Last Name field link and click the Sales History view tab.</p> <p><b>NOTE:</b> The Sales History view is read-only.</p> <p>For more information on service history, see <a href="#">“Tracking Service History” on page 143</a>.</p>
View service history	<p>Last Name field link and click the Service History view tab.</p> <p>For information on:</p> <ul style="list-style-type: none"> <li>■ Entering service history information, see <a href="#">“Managing Service History Information” on page 26</a>.</li> <li>■ Tracking service history, see <a href="#">“Tracking Service History” on page 143</a>.</li> </ul>

**Related Topics**

- [“Managing Relationships Between Contacts” on page 24](#)
- [“Associating a Vehicle with a Contact” on page 24](#)
- [“Managing Service History Information” on page 26](#)

# Managing Service History Information

Use this procedure to view, edit, create, and delete service history information for a contact.

This task is a step in [“Process of Using Automotive to Work with Contacts”](#) on page 23.

## *To view, edit, create, and delete service history information*

- 1 Navigate to the Contacts screen, then the Contacts List view.
- 2 Drill down on the Last Name field link for a selected contact record.
- 3 Click the Service History view tab.
- 4 In the Service History list, add, edit, or delete records.

For more information on service history, see [“Tracking Service History”](#) on page 143.

## Related Topics

- [“Managing Relationships Between Contacts”](#) on page 24
- [“Associating a Vehicle with a Contact”](#) on page 24
- [“Viewing Service History and Sales History for a Contact”](#) on page 25

# 5

## Managing Dealers

This chapter provides information about standard Siebel Automotive functionality for dealer management. It consists of the following topics:

- ["About Automotive Dealers" on page 27](#)
- ["Scenario for Working with Automotive Dealers" on page 27](#)
- ["Dealer Process Workflow" on page 28](#)
- ["Process of Using Automotive for Dealer Management" on page 28](#)
- ["Establishing Categories" on page 28](#)
- ["Defining Dealer Profiles" on page 29](#)
- ["Tracking Dealer Sales and Service Information" on page 30](#)

**NOTE:** Your company's application configuration and business processes may differ from the procedures or business scenarios presented in the following topics.

### About Automotive Dealers

In Siebel Automotive, 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 Dealer Administration Guide*.

### Scenario for Working with Automotive Dealers

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 a vehicle manufacturer is responsible for working with auto dealers in Michigan to make sure that they effectively represent their brand and satisfy their shared customers. He is assigned the new dealership that the administrator has just established.

The representative uses Siebel Automotive 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 are used for the dealer.

## Dealer Process Workflow

Figure 3 illustrates the end-user workflow for working with dealers.

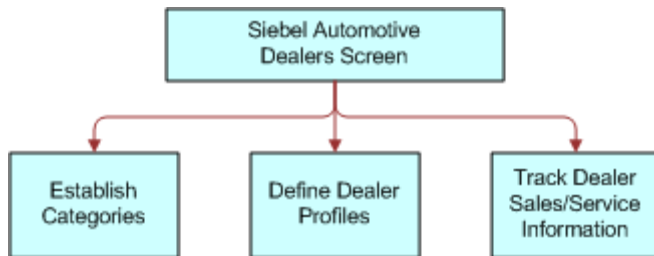


Figure 3. Dealers Workflow

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

## Process of Using Automotive for Dealer Management

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

To manage dealer information, end users perform the following tasks:

- “Establishing Categories” on page 28
- “Defining Dealer Profiles” on page 29
- “Tracking Dealer Sales and Service Information” on page 30

## 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.

This task is a step in “Process of Using Automotive for Dealer Management” on page 28.

**To view, edit, create, and delete a category**

- 1 Navigate to the Dealers screen, then the Dealers view.
- 2 Drill down on the Name field link for a selected dealer record.
- 3 Click the Categories view tab.
- 4 In the Dealer Categories list, add, edit, or delete records.

Some fields are described in the following table.

Field	Description
Category	Select the type of Contact information, such as Holdings, Hot Prospects, Interest, or Subsidiary.  <b>NOTE:</b> If the category does not appear in the dialog box, create a new, record and enter information for the new category.
Category Rank	A value that defines the category. The rank can be any numeric value.
Value	The value assigned to the category. Create new values as required.
Value Rank	Importance of the value compared to other values.

**Related Topics**

- [“Defining Dealer Profiles” on page 29](#)
- [“Tracking Dealer Sales and Service Information” on page 30](#)

## Defining Dealer Profiles

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

This task is a step in [“Process of Using Automotive for Dealer Management” on page 28](#).

**To view, edit, create, and delete a dealer profile**

- 1 Navigate to the Dealers screen.
- 2 Drill down on the Name field link for a selected dealer record.
- 3 Click the Profile view tab.
- 4 In the Profile form, add, edit, or delete records.

**Related Topics**

- [“Establishing Categories” on page 28](#)
- [“Tracking Dealer Sales and Service Information” on page 30](#)

## 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.

This task is a step in [“Process of Using Automotive for Dealer Management”](#) on page 28.

This topic consists of the following topics:

- [“Managing Vehicle Make Information”](#) on page 30
- [“Listing Days and Hours for a Dealer”](#) on page 30

## Managing Vehicle Make Information

Use this procedure to view, edit, create, and delete vehicle make information for a dealer.

### *To view, edit, create, and delete vehicle make information for a dealer*

- 1 Navigate to the Dealers screen.
- 2 Drill down on the Name field link for a selected dealer record.
- 3 Click the Sales and Service view tab.
- 4 In the Sales and Service list, add, edit, or delete records.

### **Related Topics**

- [“Establishing Categories”](#) on page 28
- [“Defining Dealer Profiles”](#) on page 29
- [“Listing Days and Hours for a Dealer”](#) on page 30

## Listing Days and Hours for a Dealer

Use this procedure to list days and hours for a dealer.

### *To list days and hours for a dealer*

- 1 Navigate to the Dealers screen.
- 2 Drill down on the Name field link for a selected dealer record.
- 3 Click the Sales and Service view tab.

- 4 In the Sales and Service link bar, click the Hours link.

If...	Then...
You want to specify sales department hours	In the Sales Hours list, for each day of the week that the department is open, perform the following steps: <ol style="list-style-type: none"> <li>1 Click New.</li> <li>2 Select the day of the week.</li> <li>3 Enter a Start Time and an End Time for the day.</li> </ol>
You want to specify service department hours	In the Service Hours list, for each day of the week that the department is open, perform the following steps: <ol style="list-style-type: none"> <li>1 Click New.</li> <li>2 Select the day of the week.</li> <li>3 Enter a Start Time and an End Time for the day.</li> </ol>

**Related Topics**

- ["Establishing Categories" on page 28](#)
- ["Defining Dealer Profiles" on page 29](#)
- ["Defining Dealer Profiles" on page 29](#)





# 6

## Managing Lease and Loan Accounts

This chapter provides information about standard Siebel Automotive functionality for managing lease and loan accounts. It consists of the following topics:

- "Scenario for Working with Lease and Loan Accounts" on page 33
- "Lease and Loan Accounts Process Workflow" on page 35
- "Process of Administering Financial Accounts" on page 35
- "About Financial Accounts" on page 36
- "Creating a Financial Product" on page 36
- "About Adding Financial Accounts" on page 37
- "Adding a Financial Account" on page 37
- "Process of Viewing Asset Finance Information" on page 37
- "Viewing Account Information" on page 38
- "Viewing Contacts" on page 38
- "Viewing Contact Address Information" on page 38
- "Viewing Contracts" on page 39
- "Viewing Vehicles Associated with a Financial Account" on page 40
- "Viewing Manufacturer and Dealer Options" on page 40
- "Viewing Originating Dealer Information" on page 41
- "Viewing Partner and Dealer Employees" on page 41
- "Process of Working with Title Information" on page 41
- "Viewing Title Information" on page 41
- "Viewing Title Detail Information for a Vehicle" on page 42
- "Querying for Delinquent Titles" on page 42

**NOTE:** Your company's application configuration and business processes may differ from the procedures or business scenarios presented in the following topics.

### Scenario for Working with Lease and Loan Accounts

This scenario features sample tasks performed by managers and call center agents. Your organization may follow a different workflow according to its business requirements.

## **Siebel Administrator**

The Siebel administrator is responsible for creating an asset product finance type and for adding a financial account.

## **Call Center Agent**

An agent receives a call from a customer with questions about their account, vehicle, or title. After identifying and authenticating the customer, the call center agent views the customer's accounts. The call center agent reads the current balance to the customer, who then wants to know whether a recent loan payment has been posted to her account. The call center agent confirms that the payment was posted yesterday. Finally, if the caller wants to initiate a change of address, then the agent initiates the change of address service request. In addition, the agent creates a log of all activities performed with the customer.

# Lease and Loan Accounts Process Workflow

Figure 4 illustrates sample tasks that administrators and end users typically perform when managing automotive accounts.

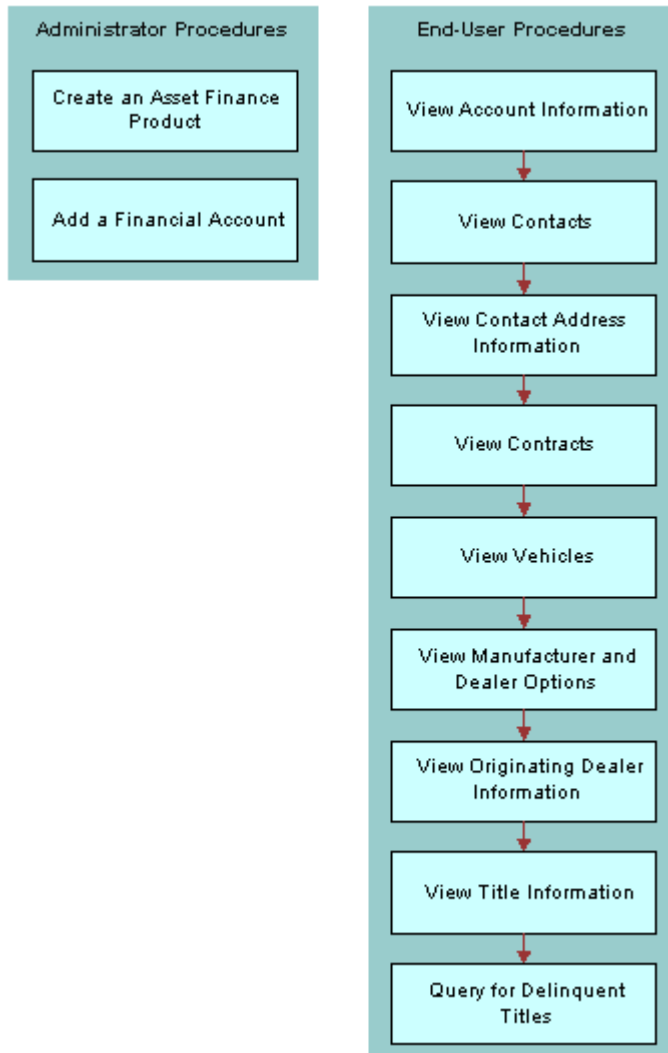


Figure 4. Automotive Accounts Sample Tasks

## Process of Administering Financial Accounts

To administer financial accounts, perform the following tasks:

- 1 [“Creating a Financial Product” on page 36](#)
- 2 [“Adding a Financial Account” on page 37](#)

#### Related Topics

- [“About Financial Accounts” on page 36](#)
- [“About Adding Financial Accounts” on page 37](#)

## About Financial Accounts

A financial account is an instance of a financial product. For example, a lease account is an instance of an Asset Finance product. Therefore an asset finance product must first be established in Siebel Automotive. This product should correspond to the financial account type that is being retrieved from the back-end system. For more information about setting up products, see the topics about products and pricing in *Siebel Finance Guide*.

Siebel Automotive provides users with information about the financial accounts in their portfolios. In order to view data relevant for each individual account, Siebel Automotive dynamically modifies certain applets to provide information that is specific to certain financial account products.

For example, for Asset Finance, Siebel Automotive displays the maturity date, APR, term, originating dealer, vehicle, payoff amounts, and so on. It is the Type attribute that determines the set of detailed information displayed for financial accounts associated with the product. For additional information about Types, see *Siebel Finance Guide*.

## Creating a Financial Product

For the Financial Accounts screen to function properly, Siebel administrators must set the Account Type to Asset Finance. Use this procedure to set the Account Type to Asset Finance.

This task is a step in [“Process of Administering Financial Accounts” on page 35](#).

#### *To create an asset finance product*

- 1 Navigate to the Administration - Product screen, then the Products view.
- 2 Create a new record.  
Complete the fields as necessary.

**NOTE:** Make sure that Asset Finance is the value selected in the Finance Product Type field.

## About Adding Financial Accounts

In Siebel Automotive, administrators can add financial accounts from the Financial Accounts screen. In many companies, Siebel Automotive is not an organization's primary system of record for financial accounts. Typically a system administrator loads financial account information from another system into Siebel Automotive.

**NOTE:** Financial account records must be associated with at least one contact when they are created. If a financial account is not associated with a contact when it is created, the account does not appear in the Financial Accounts screen.

## Adding a Financial Account

The following procedure describes how to add a financial account in Siebel Automotive.

This task is a step in ["Process of Administering Financial Accounts" on page 35](#).

### *To add a financial account*

- 1 Navigate to the Financial Accounts screen, then the Financial Account List view.
- 2 Create a record.
- 3 Complete the fields as necessary.

Some fields are described in the following table.

Field	Description
Status	The Accounts status. Specifying Open allows the financial account to appear in Siebel Automotive.
Account Number	User-assigned number.
Product	Indicates the product associated with the account. This selection populates the Type field.

## Process of Viewing Asset Finance Information

End users can view account and contact information, contracts, and so on from the Financial Account List view. To view asset finance information, end users use the following procedures to view asset finance information:

- ["Viewing Account Information" on page 38](#)
- ["Viewing Contacts" on page 38](#)
- ["Viewing Contact Address Information" on page 38](#)

- [“Viewing Contracts” on page 39](#)
- [“Viewing Vehicles Associated with a Financial Account” on page 40](#)
- [“Viewing Manufacturer and Dealer Options” on page 40](#)
- [“Viewing Originating Dealer Information” on page 41](#)
- [“Viewing Partner and Dealer Employees” on page 41](#)
- [“Process of Working with Title Information” on page 41](#)

## Viewing Account Information

Use this procedure to view account information.

This task is a step in [“Process of Viewing Asset Finance Information” on page 37](#).

### *To view account information*

- 1 Navigate to the Financial Accounts screen, then the Financial Account List view.
- 2 Drill down on the Account Number field link for a selected account record.  
To see more information, click the More Info view tab.

## Viewing Contacts

Use this procedure to view contacts associated with an account. You can also drill into the customer to view more details on the contact.

This task is a step in [“Process of Viewing Asset Finance Information” on page 37](#).

### *To view contacts associated with a financial account*

- 1 Navigate to the Financial Accounts screen, then the Financial Account List view.
- 2 Drill down on the Account Number field link for a selected account record.
- 3 Click the Contacts view tab.

## Viewing Contact Address Information

Use this procedure to view contact address information.

This task is a step in [“Process of Viewing Asset Finance Information” on page 37](#).

### *To view address information for an account*

- 1 Navigate to the Financial Accounts screen, then the Financial Account List view.

- 2 Drill down on the Account Number field link for a selected account record.
- 3 Click the Addresses view tab.

## Viewing Contracts

Contracts are legally binding documents executed between the lessor and the lessee. A contract is usually created by a dealership agent after an application for a loan or lease is approved. The contract holds the details of terms and conditions of a loan or lease and lists all the assets covered by the contract. Contracts are stored as agreements within Siebel Automotive.

This task is a step in ["Process of Viewing Asset Finance Information"](#) on page 37.

### Viewing Agreements Attached to an Account

Use this procedure to view agreements associated with a financial account.

#### *To view all agreements attached to a financial account*

- 1 Navigate to the Financial Accounts screen, then the Financial Account List view.
- 2 Drill down on the Account Number field link for a selected account record.
- 3 Click the Agreements view tab.

### Viewing Vehicle Itemized Costs

Use this procedure to view vehicle itemization details. The net price of the vehicle is usually composed of various dealer-specific charges and official charges.

#### *To view a vehicle's itemization detail*

- 1 Navigate to the Agreements screen, then the Agreements List view.
- 2 Drill down on a Name field link for a selected agreement record.
- 3 Click the Line Items view tab.
- 4 Select a line item record, and click the Vehicle Costs Itemization subview tab.

### Viewing Lease and Loan Details

Use this procedure to view lease and loan details for an agreement.

#### *To view lease/loan details for an agreement*

- 1 Navigate to the Agreements screen, then the Agreements List view.
- 2 Drill down on a Name field link for a selected agreement record.
- 3 Click the Lease/Loan Details view tab.

## Associating a Financial Account with a Lease or Loan Agreement

Use this procedure to associate a financial account with a lease and loan agreement.

### *To associate a lease or loan agreement information with a financial account*

- 1 Navigate to the Agreements screen, then the Agreements List view.
- 2 Select the agreement record you want to associate with a financial account.
- 3 In the Agreements form applet, click the Show More button.
- 4 In the Financial Account field, select a financial account record.
- 5 Navigate to the Financial Accounts screen, then the Financial Account List view.
- 6 Drill down on the Account Number field for the financial account record you selected in [Step 4](#).
- 7 Click the Agreements view tab to see the associated agreement.

## Viewing Vehicles Associated with a Financial Account

This procedure describes how to view a list of vehicles associated with a financial account.

This task is a step in [“Process of Viewing Asset Finance Information”](#) on page 37.

### *To view vehicles associated with a financial account*

- 1 Navigate to the Financial Accounts screen, then the Financial Account List view.
- 2 Drill down on the Account Number field link for a selected account record.
- 3 Click the Assets/Vehicles view tab.

## Viewing Manufacturer and Dealer Options

Use this procedure to view the manufacturer and dealer related options installed with the vehicle.

This task is a step in [“Process of Viewing Asset Finance Information”](#) on page 37.

### *To view manufacturer and dealer options with a vehicle*

- 1 Navigate to the Financial Accounts screen, then the Financial Account List view.
- 2 Drill down on the Account Number field link for a selected account record.
- 3 Click the Assets/Vehicles view tab.
- 4 Scroll down to the Vehicle Options applet.



## Viewing Originating Dealer Information

Use this procedure to display information about the dealer who sold the vehicle and is responsible for financing.

This task is a step in [“Process of Viewing Asset Finance Information” on page 37](#).

### *To view originating dealer information*

- 1 Navigate to the Financial Accounts screen, then the Financial Account List view.
- 2 Drill down on the Account Number field link for a selected account record.
- 3 Click the Partner/Dealer view tab.

## Viewing Partner and Dealer Employees

Use this procedure to display partner and dealer employees associated with a financial account. The Employees list is read-only.

This task is a step in [“Process of Viewing Asset Finance Information” on page 37](#).

### *To view partner and dealer employees*

- 1 Navigate to the Financial Accounts screen, then the Financial Account List view.
- 2 Drill down on the Account Number field link for a selected account record.
- 3 Click the Partner/Dealer view tab.
- 4 Scroll down to the Employees list applet.

## Process of Working with Title Information

To work with title information, end users perform the following tasks:

- [“Viewing Title Information” on page 41](#)
- [“Viewing Title Detail Information for a Vehicle” on page 42](#)
- [“Querying for Delinquent Titles” on page 42](#)

## Viewing Title Information

Use this procedure to view the titles associated with a financial account. The Asset Title view shows the different vehicles attached to the financial account and the corresponding title information.

This task is a step in [“Process of Working with Title Information” on page 41](#).

*To view title information associated with a financial account*

- 1 Navigate to the Financial Accounts screen, then the Financial Account List.
- 2 Drill down on the Account Number field link for a selected account record.
- 3 Click the Asset Title view tab.
- 4 In the Asset Title list, add, edit, or delete records.

## Viewing Title Detail Information for a Vehicle

Use this procedure to view details of the title. The Vehicle Title form displays details for the line selected in the Asset Title list.

This task is a step in ["Process of Working with Title Information"](#) on page 41.

*To view title detail information for a vehicle*

- 1 Navigate to the Financial Accounts screen, then the Financial Account List.
- 2 Drill down on the Account Number field link for a selected account record.
- 3 Click the Asset Title view tab.
- 4 Select a record, and scroll down to the Vehicle Title form.
- 5 In the Vehicle Title form, add, edit, or delete records.

## Querying for Delinquent Titles

Use this procedure to query for delinquent titles across financial accounts and titles. The Delinquent Title view displays all the titles that are outside of the company, that is, it displays only those titles whose status is NOT EQUAL TO In House or Title Sent.

This task is a step in ["Process of Working with Title Information"](#) on page 41.

*To query for delinquent titles*

- 1 Navigate to the Financial Accounts screen, then the Delinquent Title List view.

- 2 Select a query from the Queries drop-down list.

Some of the available queries are described in the table that follows:

Query	Description
30 Days Delinquent Titles	Displays records where the move date is from today's date to 30 days past due.
60 Days Delinquent Titles	Displays records where the move date is from today's date to 60 days past due.



# 7

## Managing End of Lease and Remarketing Activities

This chapter provides information about using Siebel Automotive functionality to manage end of lease activities and remarketing of leased, repossessed and corporate vehicles. It includes the following topics:

- [“About End of Lease and Vehicle Remarketing” on page 45](#)
- [“Scenario for Managing End of Lease and Vehicle Remarketing” on page 45](#)
- [“Setup Tasks for End of Lease and Remarketing” on page 47](#)
- [“Process of Managing End of Lease and Vehicle Remarketing” on page 59](#)
- [“Workflow Process Reference for Vehicle Remarketing” on page 66](#)
- [“Web Service Reference for Vehicle Remarketing” on page 81](#)

### About End of Lease and Vehicle Remarketing

Siebel Automotive and Siebel Dealer allow you to manage end of term and to remarket leased vehicles.

After a vehicle’s lease expires, the automotive company:

- Schedules inspection of the vehicle at a dealer or at a third-party inspection vendor, and bills the lessee for any liability.
- Schedules an appointment for the lessee to return the vehicle to a dealer.
- Attempts to sell the returned vehicle to dealers.
- Sells the vehicle at auction if no dealer buys it.

These tasks are performed by the automobile company using Siebel Automotive and by dealers using Siebel Dealer.

### Scenario for Managing End of Lease and Vehicle Remarketing

This topic gives one example of managing end of lease and vehicle remarketing. You may do this differently, depending on your business model.

## **Contacting Customers Whose Leases Are Ending**

When a customer's lease on a car is about to end, Siebel Automotive automatically generates communications to the customer about the end-of-term process. If the customer does not respond favorably to these communications, a call center agent from the automobile company's end-of-term department contacts the customer to try to convince the customer to buy a new car, buy the leased car, or extend the lease, possibly by offering promotions or other incentives.

Remarketing is necessary if the customer wants to end the lease, rather than buying the leased car or extending the lease. When the lease expires, the remarketing department will take possession of the leased car and resell it.

## **Scheduling Vehicle Inspection and Turn-In**

If the customer decides to turn in the vehicle, rather than extending the lease or purchasing the vehicle, the agent uses this telephone call to schedule appointments for inspection in turn-in.

The remarketing agent schedules an inspection either with a dealer or with a third-party inspection vendor. At the end of the lease, the vehicle must be inspected to see if there is excessive wear and tear to the vehicle, which the customer is liable for.

The remarketing agent generally schedules a turn-in appointment with the dealer who leased the car to this customer.

## **Completing the Inspection**

During the inspection, the inspection agency or dealer enters details about the condition of the vehicle.

If there are any outstanding charges as a result of the inspection, for example, charges to repair damage to the vehicle, the agent prepares a liability statement with the charges and the reason for each charge.

When the customer receives this liability statement, the customer may choose to have repairs done before returning the vehicle, rather than paying the amount on the liability statement to the automobile company. If so, the customer informs the remarketing agent, and the remarketing agent schedules a new inspection and new turn-in date after the repairs are complete.

In the most common case, the customer chooses to pay the bill on the liability statement, or there is no liability, so the customer can go to the scheduled turn-in appointment.

## **Returning the Vehicle**

The customer usually returns the vehicle to the dealer where it was leased.

The dealer enters the vehicle return date, the odometer reading, and other information in the Siebel Dealer Portal. The dealer also makes sure the Odometer Disclosure Statement is completed, signed and returned to the automobile company.

If there are any remaining charges, for example because the odometer reading was greater than expected, the agent at the automobile company prepares a liability statement and mails it to the customer.

## Selling Vehicles to Dealers

The remarketing department at the automobile company tries to sell the returned vehicle to dealers. The sales price to dealers is based on the automobile company's internal pricing structure, guided by data from organizations such as NADA, Kelley Blue Book, and Black Book.

The vehicle is automatically offered to the turn-in dealer when it is returned. This dealer can use the Dealer Portal to purchase or to decline to purchase the vehicle.

If the turn-in dealer declines to purchase the vehicle or does not act within three days, then the vehicle is automatically offered to other dealers.

## Auctioning the Vehicle

If the vehicle is not purchased by any dealer, it is sold by auction. The remarketing department at the automobile company plans for the auction sale and assigns the vehicle to the auction house that is expected to make the most profitable sale.

# Setup Tasks for End of Lease and Remarketing

Before you can use Siebel Automotive to manage end of lease and vehicle remarketing, you must:

- Set up the Siebel Dealer Portal and dealers' access to it, as described in *Siebel Dealer Administration Guide*.
- Integrate with external information systems to share data with third-party inspection vendors, to import fair market value data, and to share data with auction houses. For more information, see ["Web Service Reference for Vehicle Remarketing" on page 81](#).
- Perform the following additional set-up tasks:
  - ["Activating Workflow Processes for End of Lease and Remarketing" on page 47](#)
  - ["Configuring the Siebel Server to Run the Scheduling Job" on page 48](#)
  - ["Setting Up the Return Receipt \(Odometer Disclosure Statement\)" on page 49](#)
  - ["Setting Up the Fair Market Values" on page 51](#)
  - ["Setting Up the FMV Auction Values" on page 51](#)
  - ["Setting Up Auction Events and Pricing" on page 51](#)

## Activating Workflow Processes for End of Lease and Remarketing

Some of the end of lease and remarketing functionality is driven by workflow processes, which you must activate.

Activate all the workflow processes listed in ["Web Service Reference for Vehicle Remarketing" on page 81](#).

For more information about how to activate workflow processes, see *Siebel Business Process Framework: Workflow Guide*.

## Configuring the Siebel Server to Run the Scheduling Job

When the automotive company schedules inspections with dealers and third-party inspection agencies, all the inspections are listed in the Financial Accounts screen, Vehicle Batch Order Inspection List view.

You can trigger the batch run to schedule all the listed inspections manually, as described in [“Scheduling Inspection and Turn-In Appointments” on page 60](#). However, it is recommended that you configure the Siebel server to run the scheduling job regularly, for example, every night. You can do this by setting up a component request.

For more information on scheduling jobs, see *Siebel Applications Administration Guide*.

### To set up a component request to run the batch scheduling job

- 1 Navigate to the Administration - Server Configuration screen, Enterprises, then Component Definitions view.
- 2 In the Component Request form, Query for the component Workflow Process Batch Manager.
- 3 If the component does not already exist, create it by adding new record to the Component Definitions list and completing the necessary fields. Some fields are described in the following table.

Field	Description
Component	Enter Workflow Process Batch Manager
Alias	WfProcBatchMgr
Component Type	Select Workflow Process Manager with Batch as the runtime mode.
Component Group	Workflow Management

- 4 Navigate to the Administration - Server screen then the Jobs view.
- 5 Add a new record to the Jobs list and complete the necessary fields. Some fields are described in the following table.

Field	Description
Component/Job	Select Workflow Process Batch Manger.
Repeating?	Select this check box.
Repeating Info	In the Repeating Info form, enter values in the Repeat Interval, Repeat Unit and Scheduled Start fields to determine when the job runs.



- In the Job Parameters list, add new records with the following values in the fields.

Name Field	Value Field
Search Specification	[Account Type] = 'Asset Finance' AND [Account Status] = 'Open' AND ([Maturity Date Diff] = 180 OR [Maturity Date Diff] = 90 OR [Maturity Date Diff] = 30)
Workflow Process Name	eAuto CF Lease End Communication Workflow
User Name	Enter the user name.
Password	Enter the password.

- Submit the job.

The status becomes Active, and the job runs at the repeat interval specified.

## Setting Up the Return Receipt (Odometer Disclosure Statement)

When the vehicle is returned, the dealer gives the customer a return receipt.

To set up the return receipt, perform the following steps:

- [“Creating a Return Receipt Category for Proposals” on page 49](#)
- [“Creating the Proposal Template for the Vehicle Return Receipt” on page 50](#)
- [“Adding the Proposal Template to the Siebel Business Application” on page 50](#)

### Creating a Return Receipt Category for Proposals

Add the value Vehicle Return Proposal as one of the proposal template types. This allows you to choose Vehicle Return Proposal from the Category list of values when you create the proposal template.

#### *To add a value for this document to the list of values*

- Navigate to the Administration - Data screen, then the LOV Explorer view.
- In the List Of Values - Type list, query for APPLICATION\_TYPE.
- Click the Show More icon next to the APPLICATION\_TYPE folder, then the Values folder, then the MS\_Word folder, then the Child List of Values folder.

- 4 In the Child List of Values list, add a new record and complete the necessary fields, described in the following table.

Field	Description
Type	PROPOSAL_TEMPLATE_TYPE
Name	Vehicle Return Proposal

### Creating the Proposal Template for the Vehicle Return Receipt

Use Microsoft Word to create the proposal template used for the vehicle return receipt. Give the document the name, Vehicle Return Receipt.

Map the bookmarks in the Word document to the fields in the eAuto Vehicle Return business object, eAuto Vehicle Return business component that you want to display in the return receipt. Give the mapping the name, eAuto Vehicle Return Receipt Proposal.

For more information about creating proposal templates and mapping them to fields, see *Siebel Correspondence, Proposals, and Presentations Guide*.

#### *To create the mapping*

- 1 Navigate to the Administration - Document screen, then the Proposal Field Mapping view.
- 2 In the Business Objects list, add a new record and complete the necessary fields, described in the following table.

Field	Value
Mapping Name	eAuto Vehicle Return Receipt Proposal
Business Object	eAuto Vehicle Return

- 3 Double-click the Business Components folder, add a new record to the Business Components list, and as the business component, select eAuto Vehicle Return.
- 4 Double-click the Business Component Fields folder, add new records to the Business Component Fields list, and use these records to map the business component field to the bookmark for every bookmark you added to the Word document.

### Adding the Proposal Template to the Siebel Business Application

Finally, make the proposal template available in the Siebel Business Application.

#### *To add the proposal template to the application*

- 1 Navigate to the Administration - Document screen, Proposal Templates view.

- 2 In the Templates list, add a new record and complete the necessary fields, described in the following table.

Field	Description
Name	Enter Vehicle Return Receipt.
Category	Select Vehicle Return Proposal.
Mapping	Select eAuto Vehicle Return Receipt Proposal.
Template	Select the Word document where you created the template.

## Setting Up the Fair Market Values

The Fair Market Values Reference Data is used to store the fair market values (FMV) of vehicle products. This is used for reference, and it may be used in different ways depending on your business model.

Typically, these values are imported into the Siebel application from data created by NADA, Kelley Blue Book, Black Book, or similar organizations using the Vehicle Market Value Web service. See [“Vehicle Market Value Web Service” on page 84](#).

This data appears in the Administration - Application screen, Fair Market Values Reference Data view.

## Setting Up the FMV Auction Values

Use this table to store the fair market auction values of vehicle products. This is used for reference, and it may be used in different ways depending on your business model.

The data may be imported from an external source such as Kelley Blue book, or it may be created by your own sales division.

After being entered or imported, this data appears in the Administration - Application screen, FMV Auction Values Reference Data view.

## Setting Up Auction Events and Pricing

To sell vehicles at auction, you must do the basic work of setting up auction events, such as entering information about the auction houses that you work with.

For more information about setting up auction events, see *Siebel Events Management Guide*.

In addition, you must set up pricing for automotive auction events.

Key fields that affect pricing include:

- **Odometer.** Entered in Vehicles screen, More Info view. This is the current mileage of the vehicle, which is useful for calculating mileage adjustments.

- **Damage Extent.** Entered in Vehicles screen, More Info view. This is the damage that has occurred to the vehicle, which is useful for calculating the damage adjustments based on the value of the Damage Benchmark field, which is specific to each product.
- **Damage Adjustment Amount.** Entered in Administration - Product screen, More Info, More Info view.
- **Damage Benchmark Amount.** Entered in Administration - Product screen, More Info, More Info view.
- **Excess Mileage Factor.** Entered in Administration - Product screen, More Info, More Info view. This is the decimal value that is multiplied with the Excess Mileage, with the result deducted from Vehicle Price. It is specific to each product.

To set up pricing for auction events, perform the following steps:

- [“Setting Up the Price Vehicle and Price All Vehicles Buttons” on page 52](#)
- [“Creating Adjustments for Geographic and Vehicle Attributes” on page 56](#)
- [“Create Adjustments for Mileage” on page 58](#)
- [“Creating a Price List for the Auction” on page 58](#)
- [“Adding Vehicles to be Auctioned” on page 59](#)

### Setting Up the Price Vehicle and Price All Vehicles Buttons

You must create signals and variable maps to set up the Price Vehicle and Price All Vehicles buttons in the Events screen, Auction Events, Vehicles view.

For more information about signals and variable maps, see *Siebel Order Management Infrastructure Guide*.

**NOTE:** The steps below describe how to set up the buttons as they are already set up in the product. If you want to keep the behavior of these buttons without any changes, you do not have to set up these buttons. If you want to change the behavior of these buttons, you can modify and adjust the steps below to meet your own requirements.

#### Creating Signals for the buttons

The steps for creating the signals are similar for the two buttons.

##### *To create or modify the signal*

- 1 Navigate to Administration - Order Management screen, then the Signals view.
- 2 In the Signals list applet, create a new signal record with name, PriceAuctionVehicle, and enter a description of the signal.

**NOTE:** For the Price All Vehicles, button, create a new signal record with the name, PriceAllAuctionVehicles, and enter a description of the signal.

- 3 Save the record.
- 4 Lock the signal by selecting the Locked Flag checkbox.

- 5 In the Versions list, click the Work Space link.
- 6 In the Actions list, create a new record, or select an existing record, and complete the necessary fields, described in the following table.

Field	Value
Sequence	1
Service Type	Workflow
Service Name	PSP Driver Workflow Process
Service Method	RunProcess
Mode	Auto Vehicle
Instance Type	Line Item

- 7 In the Parameters list applet, enter input arguments for the action. As an example, parameters for the PriceAuctionVehicle signal are listed in the following table:

Input Argument	Value
CPScope	Whole
RowScope	For the PriceAuctionVehicle signal: Selected For the PriceAllVehicles signal: All
SubPSPWFName	Auto CF Asset Pricing Procedure
Variable Map - Context	Price Auction Vehicle - Context
Variable Map - Row Set	Price Auction Vehicle - Row Set

- 8 Optionally, to specify a CanInvoke check, complete the fields in the Properties list, as described in the following table.

Field	Value
Name	CanInvoke
Value	Any [\$CanUpdate]='Y'

- 9 Navigate back to the Signals list.
- 10 Click the Release New Version button to release the new version of the signal.

**NOTE:** After releasing a new version, you must start a new user session by logging out and logging in again, before you can test the new version.

### Creating Variable Maps for Context and Row Set

To set up these buttons, you must also create or modify variable maps.

*To create a new variable map*

- 1 Navigate to the Administration - Order Management screen, then the Variable Maps view.
- 2 In the Variable Maps list, add a new record and enter a name.
- 3 Lock the variable map by selecting the Locked Flag checkbox.
- 4 In the Versions list, click the Work Space hyperlink to drill down on the version of the new variable map.
- 5 Click the Modes tab, and in the Modes list, define the modes for this variable map.
  - For Price Auction Vehicle - Context, enter Any as the mode and Header as the object name.
  - For Price Auction Vehicle - Row Set, enter Any as the mode and Line Item as the object name.
- 6 Click the Details tab.
- 7 In the Variable Definitions list, create variable definitions. Variable definitions are the same for the Price Vehicle button and the Price All Vehicles button.
- 8 Variable definitions for the variable map Price Auction Vehicle - Context are listed in the following table.

Sequence	Variable Name	In/Out	Type	On Null
1	Price List Id (The Id of the Price List selected for this auction in the Events screen, Auction Events view.)	In	ID	Ignore
2	Header Id	In	ID	Ignore

Variable definitions for the variable map Price Auction Vehicle - Row Set are listed in the following table.

Sequence	Variable Name	In/Out	Type	On Null
1	Product Id (The Id of the Product that the vehicle is based on.)	In	ID	Ignore
2	Id	In	ID	Ignore
3	Geographic Location (As entered in the Vehicle screen, More Info view, State field.)	In	Text	Ignore
4	Purchase Price (This field is updated with the calculated price of the vehicle, which is displayed in the Events screen, Auction Events, Vehicles view, Resale Price field.)	In/Out	Currency	Ignore

Sequence	Variable Name	In/Out	Type	On Null
5	Damage	In	Number	Ignore
6	Mileage	In	Number	Ignore
7	Currency Code (Defaulted to the system currency.)	In	Text	Ignore
8	Exchange Date (Defaulted to the current date.)	In	Date	Ignore
9	Exterior Color (Taken from the vehicle attribute in the Vehicles screen.)	In	Text	Ignore
10	Engine (Taken from the vehicle attribute in the Vehicles screen.)	In	Text	Ignore
11	Transmission (Taken from the vehicle attribute in the Vehicles screen.)	In	Text	Ignore
12	Damage Benchmark	In	Number	Ignore
13	Multiplicative Factor	In	Number	Ignore
14	Damage Adjustment Amount	in	Number	Ignore

- In the Variable Sources list, define the source of the variable for each mode. The same fields are used for the Price Vehicle and Price All Vehicles buttons.

Variable sources for the variable map Price Auction Vehicle - Context are listed in the following table.

Mode	Path	Source Type
Auto Vehicle	\$Current/Header/Auction Price List Id	In
Auto Vehicle	\$Current/Header/Event Row Id	In

Variable sources for the variable map Price Auction Vehicle - Row Set are listed in the following table.

Mode	Path	Source Type
Auto Vehicle	\$Current/Line Item/Product Id	In
Auto Vehicle	\$Current/Line Item/Asset Id	In
Auto Vehicle	\$Current/Line Item/Geographic Location	In
Auto Vehicle	\$Current/Line Item/Purchase Price	In/Out
Auto Vehicle	\$Current/Line Item/Damage	In

Mode	Path	Source Type
Auto Vehicle	\$Current/Line Item/Mileage	In
Auto Vehicle	\$Current/Line Item/Currency Code	In
Auto Vehicle	\$Current/Line Item/Exchange Date	In
Auto Vehicle	\$Current/Line Item/Exterior Color	In
Auto Vehicle	\$Current/Line Item/Engine	In
Auto Vehicle	\$Current/Line Item/Transmission	In
Auto Vehicle	\$Current/Line Item/Damage Benchmark	In
Auto Vehicle	\$Current/Line Item/Multiplicative Factor	In
Auto Vehicle	\$Current/Line Item/Damage Adjustment Amount	In

- 10 Define child variable maps, as necessary.
- 11 Navigate back to the Variable Maps list applet and click the Release New Version button to release the variable map version.

## Creating Adjustments for Geographic and Vehicle Attributes

When you create a price list, you will adjust the list price for each vehicle based on attributes that represent its geographic location and its customizable features. In this step, you create these attribute adjustments.

The attributes are visible in the Administration - Product screen, More Info, More Info view. The list price in the price list is the base line price for these vehicles, and the price is adjusted based on the value of these attributes: for example, the price might be higher if a vehicle has a more powerful engine.

### *To create adjustments for Geographic and Vehicle Attributes*

- 1 Navigate to the Administration - Pricing screen, then the Attribute Adjustments view.
- 2 In the Attribute Adjustments list, add a new record and complete the necessary fields, as described in the following table.

Field	Value
Name	Auto CF Asset Pricing Adjustments
Class	The Product Class of the Product
Type	Single Dimension



Field	Value
Effective From	Enter the start date of the time period when this attribute adjustment is active
Effective To	Enter the end date of the time period when this attribute adjustment is active

- 3 Specify Dimensions and Domains for the attributes you created:
  - a In the Attribute Adjustments list, select the attribute adjustment whose dimensions you are specifying.
  - b In the More Info view, click Create Result Dimensions.
  - c Click the Dimensions view tab.
  - d In the Dimensions list, add a record for each dimension that affects the price and complete the necessary fields, as described in the following table.

Dimension Type	Name	Op	Var Map Type	Var Name	Data Type	Domain Type	Bounded	LOV	Sort Order	Sort Method
Condition	Geo-graphic Location	=	Row	Geo-graphic Location	Text	LOV	Y	STATE_AB BREV	1	Asc
Condition	Transmission	=	Row	Transmission	Text	LOV	Y	AUTO_TRANSMISSION_TYPE	1	Asc
Condition	Engine	=	Row	Engine	Text	LOV	Y	AUTO_ENGINE_TYPE	1	Asc
Condition	Exterior Color	=	Row	Exterior Color	Text	LOV	Y	AUTO_EXTERIOR	1	Asc

- 4 Add conditions, which are the rules that state the result of the adjustment for each combination of condition dimensions:
  - a In the Attribute Adjustments list, select the attribute adjustment whose rules you are specifying.
  - b Click the Conditions view tab.  
The conditions list appears, with a Name column for the name of each condition.
  - c If all domain values of each dimension impact price, you can generate rules as follows:
    - In the Attribute Adjustment form, click Generate Rules. Records are added to the Rules list with every possible combination of domain values of the condition dimensions domains.
    - In the Rules list, enter the Adjustment Type and Adjustment Value for each record.

- In the Conditions form, enter the rules.
- 5 Associate variable maps with these pricing adjustments:
  - a Navigate to the Administration - Pricing screen, Attribute Adjustments, then the Variable Map view.
  - b Select the appropriate row set and context variable maps from the pick lists.

## Create Adjustments for Mileage

You create a discount matrix to adjust the prices for mileage.

### *To create adjustments for mileage*

- 1 Navigate to the Administration - Pricing screen, then the Discount Matrices View.
- 2 Add a new record to the Discount Matrices list and complete the necessary fields, as described in the following table.

Field	Value
Name	Auto CF Mileage Adjustments
Discount Matrix Type	Product-Based Adjustment

- 3 In the Discount Criteria list, add records for all the criteria dimensions that you want exposed in the discount matrix.  
  
The criteria dimensions that you can add depend on the value selected in the Discount Matrix Type field in [Step 2](#).
- 4 After all the necessary criteria dimensions are added (Mileage Lower Bound, Mileage Upper Bound, Product), click Complete Definition in the Discount Matrix list.  
  
Clicking this button freezes the definition of the discount matrix. After this step, you cannot change the discount matrix type or the criteria dimensions.

## Creating a Price List for the Auction

Now that you have created adjustments, you can create a price list for the auction which adjusts prices of vehicles based on their list price and on those adjustments.

This price list can apply to many auctions, and you link it specific auctions in the Events screen.

For more information about creating price lists, see *Siebel Pricing Administration Guide*.

### *To create a price list*

- 1 Navigate to the Administration - Pricing screen, then the Price List view.
- 2 In the Price List list, add a new record and complete the necessary fields.
- 3 Drill down on the Name field of the price list.

- 4 Add a line item for each product and complete the necessary fields. Some fields are described in the following table.

Field	Value
Product	Select the product.
Attribute Adjustment	Select the adjustment for this product.

- 5 Link the price list to a specific auction:
  - a Navigate to the Events screen, then the Auction Events view.
  - b In the Auction Events list, select the desired auction.
  - c In the Price List field, select the desired price list.

### **Adding Vehicles to be Auctioned**

Now, you can add the vehicles to be auctioned at a given auction. For each auction, add the vehicles and select the appropriate adjustment used for each vehicle.

#### *To add the vehicles to be auctioned*

- 1 Navigate to the Events screen, the Auction Events, and then the Vehicles view.
- 2 For each vehicle to be auctioned, add a record to the Vehicles list and complete the necessary fields.

## **Process of Managing End of Lease and Vehicle Remarketing**

To manage end of lease and vehicle remarketing, perform the following tasks:

- [“Contacting Customers Whose Leases Are Ending” on page 60](#)
- [“Scheduling Inspection and Turn-In Appointments” on page 60](#)
- [“Entering Inspection Information \(Dealer or Third-Party\)” on page 62](#)
- [“Viewing Inspection Information and Generating Charges” on page 63](#)
- [“Receiving Returned Vehicles \(Dealer\)” on page 63](#)
- [“Selling Returned Vehicles to Dealers” on page 64](#)
- [“Auctioning Returned Vehicles” on page 64](#)

## Contacting Customers Whose Leases Are Ending

Siebel Automotive automatically contacts customers whose leases will end soon to convince them to buy or lease a new vehicle, to buy the leased vehicle, or to extend the lease. Communications are generated by the workflow process [“eAuto CF Lease End Communications Workflow Process”](#) on [page 70](#).

If the customers do not respond to these automatic communications, the remarketing agent contacts them and attempts to convince them to buy or lease a new vehicle, to buy the leased vehicle, or to extend the lease. If the customer does not buy the leased vehicle or renew the lease, the agent schedules inspection and turn-in of the leased vehicle and enters information about the leased vehicle.

Remarketing agents usually have their Siebel Automotive application set up so the customers whose leases will end soon are displayed on their home page when they log in. If not, they can find these customers by using the following procedure.

This task is a step in [“Process of Managing End of Lease and Vehicle Remarketing”](#) on [page 59](#).

### *To contact customers whose leases are ending*

- 1 Navigate to the Financial Accounts screen, then the Financial Account List view.
- 2 Query to find all records where the value in the Type field is Asset Finance and the value in the Status field is not Closed.
- 3 Sort the records based on the value in the Maturity Date field, so leases that will expire soon are at the top of the list.
- 4 For leases that will expire soon, drill down on the account number to see more information, and review the account to see correspondence from the customer, possible delinquency activities, and other information.
- 5 Click the Activities view tab to view correspondence that was sent to the customer.
- 6 Check whether the customer has decided to turn in the vehicle:  
If the value in the Account States field in the Financial Account form is Turn In, the customer has decided to turn in the vehicle.
- 7 If the customer has not decided whether to turn in the vehicle, telephone or write the customer to see whether they want to renew the lease or buy the vehicle.

## Scheduling Inspection and Turn-In Appointments

If the customer does not want to renew the lease or buy the leased car, the remarketing agent schedules the inspection appointment at a dealer or a third-party inspection agency, to determine whether there is any damage to the vehicle that the customer is liable for. At the same time, the remarketing schedules a turn-in appointment at a dealer, usually at the same dealer where the customer leased the vehicle.

All inspection appointments scheduled are listed in the Batch Inspection view. The appointments in this list are sent to the inspection agencies every night.

After the remarketing agent adds this record to indicate that inspection is necessary, the dealer or inspection agency follows up with the customer to set the date and time of the inspection appointment.

This task is a step in [“Process of Managing End of Lease and Vehicle Remarketing”](#) on page 59.

### ***To schedule the inspection appointment***

- 1 Navigate to the Financial Accounts screen, then the Financial Account List view.
- 2 Drill down on the Account number for the vehicle.
- 3 Click the Asset Inspection view tab.
- 4 Create a new Asset Inspection Summary record and complete the necessary fields, described in the following table.

Field	Description
Ordered	Displays the current date and time.
Status	Select Scheduled.
Asset ID/VIN	Select the identification number for the vehicle.
Company	Select the company that will perform the inspection. This may be either a dealer or a third-party inspection agency.

### ***To view vehicles scheduled for the batch inspection run***

- Navigate to the Financial Accounts screen, then the Vehicle Batch Order Inspection List view.

**NOTE:** You can trigger the batch run by using the following procedure, or you can configure it to run regularly, as described in [“Configuring the Siebel Server to Run the Scheduling Job”](#) on page 48.

### ***To run batch inspection***

- 1 Navigate to the Financial Accounts screen, then the Vehicle Batch Order Inspection List view.
- 2 Click Schedule Inspection.

## **Scheduling Turn-In Appointments**

During this telephone call, the remarketing agent also makes an appointment for the customer to turn in the vehicle. Usually, the vehicle is turned in at the same dealer where it was leased.

You share information with dealers using the Siebel Dealer Portal.

### ***To schedule the Turn-in Appointment***

- 1 Navigate to the Financial Accounts screen.
- 2 Drill down on the Account number for the vehicle.

- 3 Click the Asset Turn In view tab.
- 4 Create a new Asset Turn In record and complete the necessary fields, described in the following table.

Field	Description
Turn-In Date	Select the date and time of the appointment.
Asset ID/VIN	Select the identification number for the vehicle.
Turn-In Mileage	Enter the mileage at the time of turn in.
Partner/Dealer	Select the dealer where the vehicle will be turned in.
Status	Select Scheduled. Possible values are Scheduled, Confirmed, and Actual.

## Canceling an Inspection Appointment

If necessary, you can cancel an inspection appointment. For example, a customer may call and say that he or she has a conflicting appointment at that time.

### *To cancel a scheduled inspection*

- 1 Navigate to the Financial Accounts screen, then the Financial Account List view.
- 2 Drill down on the Account number for the vehicle.
- 3 Click the Asset Inspection view tab.
- 4 In the record for the appropriate inspection appointment, in the Canceled field, select the current date and time.

## Entering Inspection Information (Dealer or Third-Party)

Either a third-party inspection vendor or a dealer may perform the inspection.

After it sees that the automobile company has added an asset inspection record, it contacts the customer to set the date and time of the inspection appointment.

If a third-party vendor performs the inspection, the inspection information is usually entered in the vendor's own application. You can obtain the inspection information by integrating Siebel Automotive with their information system using Web services.

If a dealer performs the inspection, they can enter the inspection information in the Dealer Portal. For more information, see *Siebel Dealer Administration Guide*.

This task is a step in "[Process of Managing End of Lease and Vehicle Remarketing](#)" on page 59.

## Viewing Inspection Information and Generating Charges

After the inspection, the agent receives information from the inspection agency which appears in the Asset Inspection, Inspection Assessment Summary view of Siebel Automotive. This includes the following forms:

- **Body Assessment form.** The inspection agency entered the number of small and large dings, dents, and scratches and the cost of repairing them.
- **Excess Usage form.** The inspection agency entered the actual odometer reading at the time of inspection. The area also displays the initial odometer reading, the mileage allowed by contract, and the per mile charge for excess mileage beyond what is allowed by contract.

The remarketing agent calculates the charges to the customer based on the information entered by the inspection agency. These charges appear in the Asset Inspection, Inspection Assessment Details view.

The agent generates an invoice and mails it to the customer.

The customer may want to do some of the repairs and take the car for inspection again after the repairs are complete, or the customer may decide to pay the charge. If a second inspection is needed, the agent schedules a new inspection appointment and turn-in appointment, as described in [“Scheduling Inspection and Turn-In Appointments” on page 60](#).

This task is a step in [“Process of Managing End of Lease and Vehicle Remarketing” on page 59](#).

### *To view inspection information and generate charges*

- 1 Navigate to the Financial Accounts screen.
- 2 Drill down on the Account number for the vehicle.
- 3 Click the Asset Inspection view tab.
- 4 Select the appropriate Asset Inspection Summary record.  
The Inspected field of the Asset Inspection Summary record tells you when the vehicle was inspected.
- 5 Scroll down, and click Generate Charges.
- 6 Click the Inspection Assessment Details link to view the details of the charges, which were inserted here when you clicked Generate Charges.
- 7 Click Generate Invoice, print the invoice, and mail the invoice to the customer.

## Receiving Returned Vehicles (Dealer)

At the time of the turn-in appointment, the dealer receives the returned vehicle and logs into the Dealer Portal to complete information such as the actual return date and the actual return mileage.

For more information, see *Siebel Dealer Administration Guide*.

This task is a step in [“Process of Managing End of Lease and Vehicle Remarketing” on page 59](#).

## Selling Returned Vehicles to Dealers

After the dealer has received the returned vehicle, the automobile company tries to sell the vehicle to dealers.

When the dealer receives the vehicle, it is automatically posted for sale to the receiving dealer on the Dealer Portal.

The sales price is automatically based on the residual value of the vehicle, which appears in the Current Residual field of the Financial Accounts screen, Assets/Vehicles view.

Initially, the vehicle is only visible to the dealer who leased it and the dealer who received it, who have the exclusive right to purchase the vehicle. If these dealers decline to purchase the vehicle, or if they do not act within three days, the vehicle automatically becomes visible and available to all the dealers in the same territory as this dealer. The territory is a geographical area that is associated with every dealer. If no dealer purchase the vehicle within ten days, it is removed from the vehicle purchase list and is no longer available for sale.

In the Dealer Portal, dealers can purchase or decline to purchase the vehicle. For more information, see *Siebel Dealer Administration Guide*.

This task is a step in [“Process of Managing End of Lease and Vehicle Remarketing” on page 59](#).

## Auctioning Returned Vehicles

If no dealers buys the product, the account manager works with an auction house to plan the event where this vehicle will be auctioned.

When the information about the auction event is available, the account manager enters the information about the event and about all the cars that will be auctioned at that event in Siebel Automotive, and sends this information to the auction house by email.

This task is a step in [“Process of Managing End of Lease and Vehicle Remarketing” on page 59](#).

## Entering Information About an Auction Event

After planning of an auction event is complete, the account manager enters information about the auction event.

### *To enter information about the auction event*

- 1 Navigate to the Events screen, then the Auction Event List view.



2 Add a new record and complete the necessary fields, described in the following table.

Field	Description
Event ID	Displays a system-generated identification number for the event.
Event Type	Select the type of auction. Options are Open, Close, Online, Employee Sale.
Event Sub Type	Select the sub-type of the auction.
Event Status	Displays the status of the event. The field is populated as follows: <ul style="list-style-type: none"> <li>■ <b>In Planning.</b> Set automatically when the Event record is created.</li> <li>■ <b>Scheduled.</b> After you have entered all the necessary data about the auction, select Scheduled manually in the Status field to cancel the event.</li> <li>■ <b>Closed.</b> Select this value after the auction has closed.</li> <li>■ <b>Cancelled.</b> Select Cancelled manually in the Status field to cancel the event.</li> <li>■ <b>No Sale.</b> Select No Sale manually in the status field if no vehicles are sold at the event.</li> </ul>
Event Date	Enter the date of the event.
Event Price List	Select the price list for the auction. This list specifies the base price, the minimum price accepted for each vehicle.
Auction ID	Select the auction house.
Auction House	Displays the name of the auction house after you select the house in the Auction ID field.
Cancel Date	Displays the date when the auction was cancelled. If you select Cancelled in the Status field, this field is automatically populated with the current date.
Team	Displays the team at the automotive company that deals with this auction house. This is populated automatically when you select the house in the Auction ID field.
Created By	Displays the user ID of the employee who created this record.
Event Volume	Displays the sum of all volume that the remarketing department wants to include in this event. This is a forecast for the event.

## Adding Vehicles to an Auction Event

You can add vehicles to an auction event when you create the Auction Event record or at a later time.

### ***To add vehicles to the auction event***

- 1** Navigate to the Events screen, then the Auction Event List view.
- 2** Drill down on the Event ID field for the auction you want to add the vehicle to.  
The Auction Event form and Vehicles list appears.
- 3** Add a new record to the Vehicles list.
- 4** In the VIN field of the new record, select the vehicle.  
Other fields of the Vehicles record, such as make, model, and year are automatically populated.
- 5** Enter the base price of vehicles in one of two ways:
  - a** Select vehicles and click Price Vehicle to price the selected vehicles.
  - b** Click Price All to price all vehicles.The price of each vehicle is displayed in the Resale Price field, based on the price list and on the attributes of the vehicle.
- 6** If you want to see the details of how this price was determined, you can click the Resale Price field to display a pricing waterfall.  
For more information about pricing waterfalls, see *Siebel Pricing Administration Guide*.

### **Sending Info to the Auction House**

After you have defined the auction event and added vehicles to it, you transmit this information to the auction house using the Auction List Web service. For more information, see [“Auction List Web Service” on page 87](#).

## **Workflow Process Reference for Vehicle Remarketing**

End of lease and remarketing uses the following workflow processes:

- [“Auto CF EOT Account States Vehicle Turn In Workflow Process” on page 67](#)
- [“Auto CF EOT Account States Vehicle Inspection Workflow Process” on page 68](#)
- [“Auto CF Schedule Inspection Workflow Process” on page 69](#)
- [“Auto Generate Charges Workflow Process” on page 69](#)
- [“eAuto CF Lease End Communications Workflow Process” on page 70](#)
- [“eAuto CF Lease End Comm1 XML Generation Workflow Process” on page 72](#)
- [“eAuto CF Lease End Comm2 XML Generation Workflow Process” on page 73](#)
- [“eAuto CF Lease End Comm3 XML Generation Workflow Process” on page 74](#)
- [“eAuto Vehicle Return Workflow Process” on page 75](#)
- [“Auto CF Activity Attachment Workflow Process” on page 76](#)

- "Auto Dealer Vehicle Purchase Workflow Process" on page 76
- "Auto CF EOT Account States Vehicle Dealer Turn In Workflow Process" on page 77
- "Auto VehiclePublishForPurchaseORAuction Workflow Process" on page 77
- "Auto CF Auction Vehicle List Workflow Process" on page 78
- "eAuto Vehicle Return Inspection Report Workflow Process" on page 79
- "eAuto Vehicle Go To Vehicle Attachments View Workflow Process" on page 79
- "Auto CF Asset Pricing Procedure Workflow Process" on page 80

## Auto CF EOT Account States Vehicle Turn In Workflow Process

This workflow process inserts account states for the financial account, based on the turn-in status of the vehicle. It is triggered when a new record is saved in the Asset Turn In view.

This workflow process is shown in [Figure 5](#).

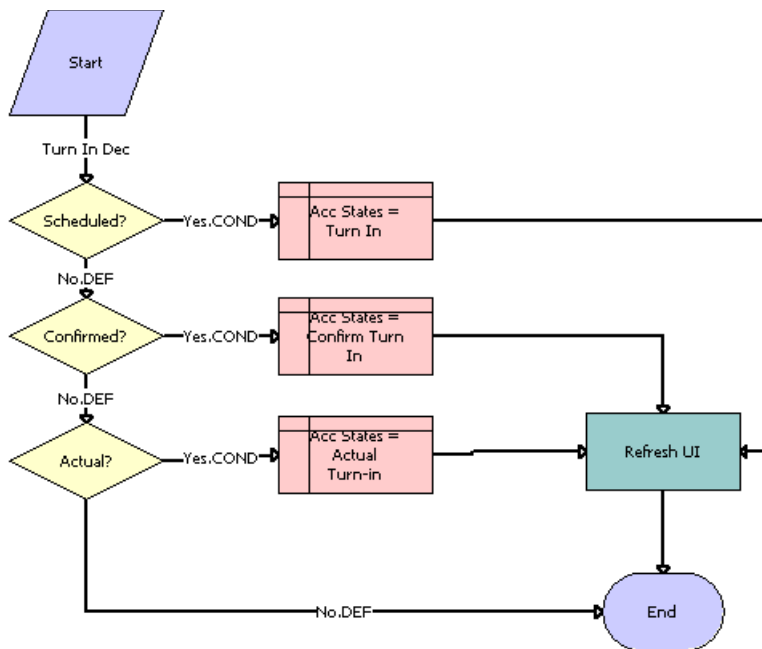


Figure 5. Auto CF EOT Account States Vehicle Turn In Workflow Process

**Workflow Process Description.** This workflow process performs the following actions:

- 1 **Scheduled?** This step checks the value of the Turn In Status for the new saved record and if it is equal to Scheduled, the next step would be Acc States = Turn In.
- 2 **Acc States = Turn In.** This step inserts the Account States record with the value Turn In.

- 3 **Confirmed?** This step checks the value of the Turn In Status for the new saved record and if it is equal to Confirmed, the next step would be Acc States = Confirm Turn In.
- 4 **Acc States = Confirm Turn In.** This step inserts the Account States record with the value Confirm Turn-in.
- 5 **Actual?** This step checks the value of the Turn In Status for the new saved record and if it is equal to Actual, the next step would be Acc States = Actual Turn In.
- 6 **Acc States = Actual Turn In.** This step inserts the Account States record with the value Actual Turn-in.
- 7 **Refresh UI.** This step refreshes the view to reflect the change in Account State.

## Auto CF EOT Account States Vehicle Inspection Workflow Process

This workflow process inserts the account states for the financial account, based on the value of the inspection status of the vehicle. It is triggered when a new record is saved in the Asset Inspection view.

This workflow process is shown in [Figure 6](#).

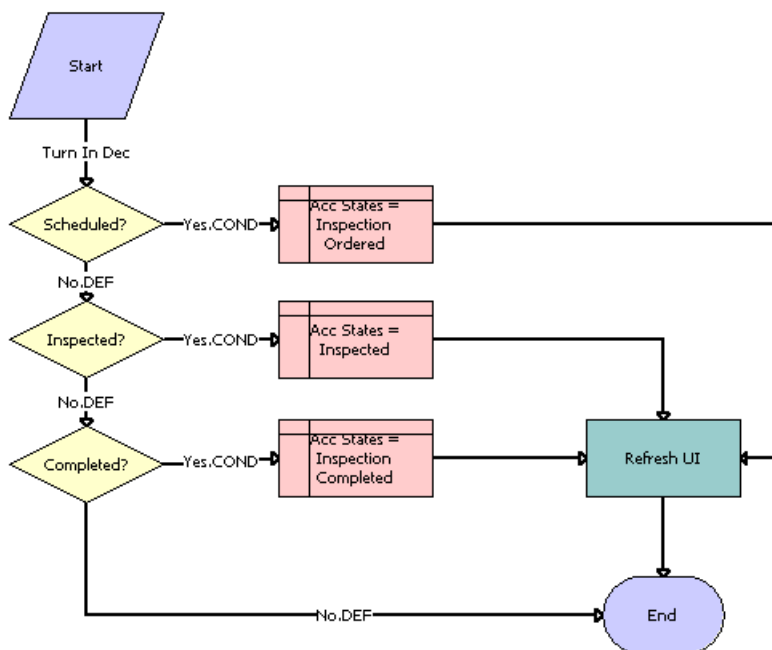


Figure 6. Auto CF EOT Account States Vehicle Inspection Workflow Process

**Workflow Process Description.** This workflow process performs the following actions:

- 1 **Scheduled?** This step checks the value of the Inspection Status for the new saved record and if it is equal to Scheduled, the next step would be Acc States = Inspection Ordered.
- 2 **Acc States = Inspection Ordered.** This step inserts the Account States record with the value Inspection Ordered.
- 3 **Inspected?** This step checks the value of the Inspection Status for the new saved record and if it is equal to Inspected, the next step would be Acc States = Inspected.
- 4 **Acc States = Inspected.** This step inserts the Account States record with the value Inspected.
- 5 **Completed?** This step checks the value of the Inspection Status for the new saved record and if it is equal to Completed, the next step would be Acc States = Inspection Completed.
- 6 **Acc States = Inspection Completed.** This step inserts the Account States record with the value Inspection Completed.
- 7 **Refresh UI.** This step refreshes the view to reflect the change in Account State.

## Auto CF Schedule Inspection Workflow Process

This workflow process generates a list of vehicles that need to be scheduled for inspection.

This workflow process is shown in [Figure 7](#).

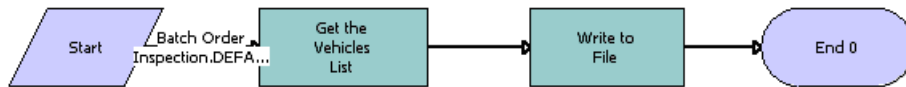


Figure 7. Auto CF Schedule Inspection Workflow Process

**Workflow Process Description.** This workflow process performs the following actions:

- 1 **Get the Vehicles List.** This step finds all the vehicles that need to be scheduled for inspection. Uses the EAI Siebel Adapter service to query for the vehicles.
- 2 **Write to File.** This step gets the list of vehicles from the previous step and writes that list to an XML file.

## Auto Generate Charges Workflow Process

This workflow process generates the inspection charges for the inspected vehicle.

This workflow process is shown in [Figure 8](#).

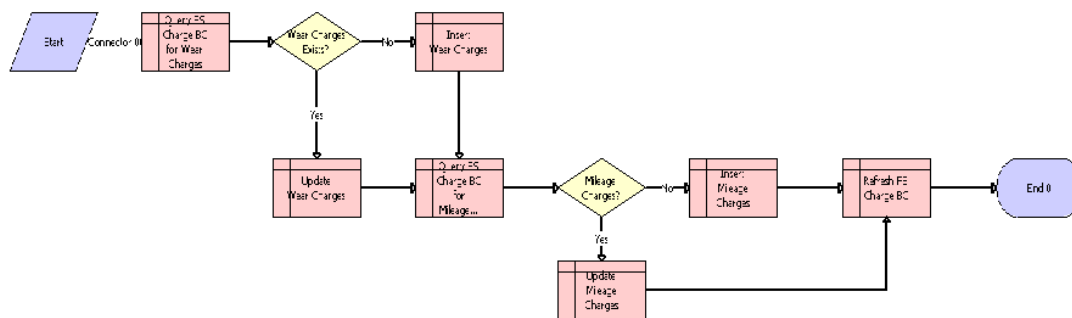


Figure 8. Auto Generate Charges Workflow Process

**Workflow Process Description.** This workflow process performs the following actions:

- 1 **Query FS Charge BC for Wear Charges.** This step queries the FS Charge table for the records whose type is Wear Charges.
- 2 **Wear Charges Exists?** This step checks whether any record with Wear Charges type exists. If so, the next step is Update Wear Charges; if not, the next step is Insert Wear Charges.
- 3 **Update Wear Charges.** This step updates the Wear Charges record of the vehicle with the total wear charge.
- 4 **Insert Wear Charges.** This step inserts the Wear Charges record for the inspected vehicle.
- 5 **Query FS Charge BC for Mileage Charges.** This step queries the FS Charge table for the records whose type is Mileage Charges.
- 6 **Mileage Charges?** This step checks whether any record with Mileage Charges type exists. If so, the next step is Update Mileage Charges; if not, the next step is Insert Mileage Charges.
- 7 **Update Mileage Charges.** This step updates the Mileage Charges record of the vehicle with the Total Mileage charge.
- 8 **Insert Mileage Charges.** This step inserts the Mileage Charges record for the inspected vehicle.
- 9 **Refresh FS Charge BC.** This step refreshes the Charges records.

## eAuto CF Lease End Communications Workflow Process

This workflow process begins lease-end communications by sending notification letters. The workflow process is triggered by a batch job scheduled every night which processes all the records due for the end-of-term communication. The records that require further processing are assigned to the remarketing agent using Siebel Assignment Manager. An XML file is generated which includes all the financial records that have been processed.

This workflow process is shown in Figure 9.

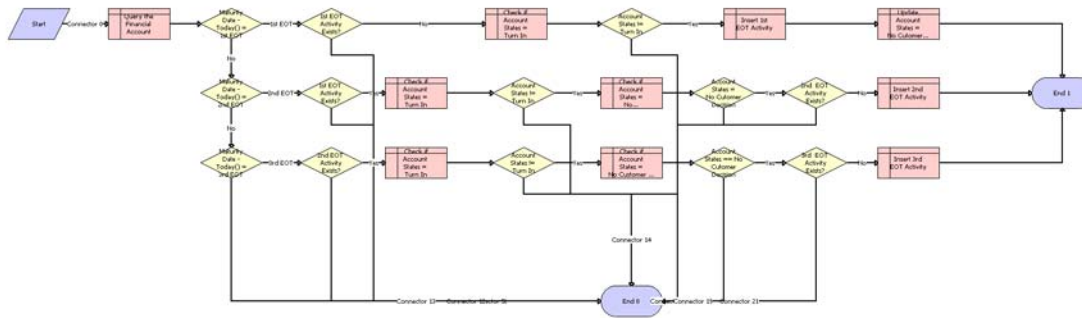


Figure 9. eAuto CF Lease End Workflow Process

**Workflow Process Description.** This workflow process performs the following actions:

- 1 **Query the Financial Account.** This step finds all the recommended details of the financial account based on the current context.
- 2 **Maturity Date - Today() = 1st EOT.** This step checks if the difference between the maturity date and the current date is equal to the duration for the first lease-end communication.
- 3 **1st EOT Activity Exists?** This step checks if the first end-of-term Communication has already been carried out. If so, skips the following steps and ends the workflow process.
- 4 **Check if Account States = Turn In.** This step finds out if the account state of the financial account is Turn In.
- 5 **Account States != Turn In?** This step checks if the customer has already decided to turn in the Vehicle. If so, skips the following steps and ends the workflow process.
- 6 **Insert 1st EOT Activity.** This step creates a first end-of-term Activity record.
- 7 **Update Account States = No Customer Decision.** This step updates the account states to No Customer Decision.
- 8 **Maturity Date - Today() = 2nd EOT.** This step checks if the difference between the maturity date and the current date is equal to the duration for the second lease-end communication.
- 9 **1st EOT Activity Exists?** This step checks if the first end-of-term Communication has already been carried out. If so, skips the following steps and ends the workflow process.
- 10 **Check if Account States = Turn In.** This step finds out if the account state of the financial account is Turn In.
- 11 **Account States != Turn In?** This step checks if the customer has already decided to turn in the Vehicle. If so, skips the following steps and ends the workflow process.
- 12 **Check if Account States = No Customer Decision.** This step finds out if the account state of the financial account is No Customer Decision.

- 13 Account States = No Customer Decision?** This step checks if the customer has communicated his decision. If so, skips the following steps and ends the workflow process.
- 14 2nd EOT Activity Exists?** This step checks if the second end-of-term Communication has already been carried out. If so, skips the following steps and ends the workflow process.
- 15 Insert 2nd EOT Activity.** This step creates a first end-of-term Activity record.
- 16 Maturity Date - Today() = 3rd EOT.** This step checks if the difference between the maturity date and the current date is equal to the duration for the third lease-end communication.
- 17 2nd EOT Activity Exists?** This step checks if the second end-of-term Communication has already been carried out. If so, skips the following steps and ends the workflow process.
- 18 Check if Account States = Turn In?** This step finds out if the account state of the financial account is Turn In.
- 19 Account States != Turn In?** This step checks if the customer has already decided to turn in the Vehicle. If so, skips the following steps and ends the workflow process.
- 20 Check if Account States = No Customer Decision.** This step finds out if the account state of the financial account is No Customer Decision.
- 21 Account States = No Customer Decision?** This step checks if the customer has communicated his decision. If so, skips the following steps and ends the workflow process.
- 22 3rd EOT Activity Exists?** This step checks if the second end-of-term Communication has already been carried out. If so, skips the following steps and ends the workflow process.
- 23 Insert 3rd EOT Activity.** This step creates a first end-of-term Activity record.

## eAuto CF Lease End Comm1 XML Generation Workflow Process

This workflow process generates an XML file that includes all the financial account records for the first lease-end communication. It is triggered by scheduling a job with Workflow Process Manager. Schedule Start should be set to a time that allows time to complete the batch job set for eAuto CF Lease End Communication Workflow Process.



This workflow process is shown in [Figure 10](#).



Figure 10. eAuto CF Lease End Comm1 XML Generation Workflow Process

**Workflow Process Description.** This workflow process performs the following actions:

- 1 EAI Siebel Adapter Query.** This step retrieves all the records that had the first end-of-term communication Activity created for the current day.
- 2 EAI XML Write to File.** This step generates an XML file consisting of all the retrieved records.

## eAuto CF Lease End Comm2 XML Generation Workflow Process

This workflow process generates an XML file that includes all the financial account records for the second lease-end communication. It is triggered by scheduling job with Workflow Process Manager. Schedule Start should be set to a time that allows time to complete the batch job set for eAuto CF Lease End Communication Workflow Process.

This workflow process is shown in [Figure 11](#).



Figure 11. eAuto CF Lease End Comm2 XML Generation Workflow Process

**Workflow Process Description.** This workflow process performs the following actions:

- 1 EAI Siebel Adapter Query.** This step retrieves all the records that had the second end-of-term communication Activity created for the current day.
- 2 EAI XML Write to File.** This step generates an XML file consisting of all the retrieved records.

## eAuto CF Lease End Comm3 XML Generation Workflow Process

This workflow process generates an XML file that includes all the financial account records for the third lease-end communication. It is triggered by scheduling a job with Workflow Process Manager. Schedule Start should be set to a time that allows time to complete the batch job set for eAuto CF Lease End Communication Workflow Process.

This workflow process is shown in [Figure 12](#).



Figure 12. eAuto CF Lease End Comm3 XML Generation Workflow Process

**Workflow Process Description.** This workflow process performs the following actions:

- 1 **EAI Siebel Adapter Query.** This step retrieves all the records that had the second end-of-term communication Activity created for the current day.
- 2 **EAI XML Write to File.** This step generates an XML file consisting of all the retrieved records.

## eAuto Vehicle Return Workflow Process

This workflow process creates a Proposal record when the Complete Return button is clicked.

This workflow process is shown in [Figure 13](#).

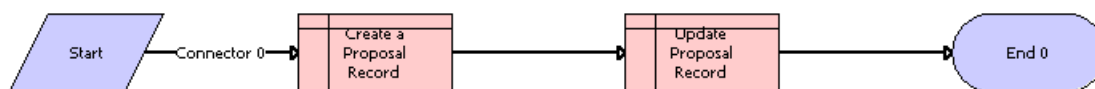


Figure 13. eAuto Vehicle Return Workflow Process

**Workflow Process Description.** This workflow process performs the following action:

- 1 **Create a Proposal Record.** This step creates a Proposal Record.
- 2 **Update Proposal Record.** This step updates the name of the proposal, appending the Row Id to the name.

## Auto CF Activity Attachment Workflow Process

This workflow process creates an Activity record when the vehicle return receipt is generated, and it adds the receipt as an attachment to the created activity.

This workflow process is shown in [Figure 14](#).

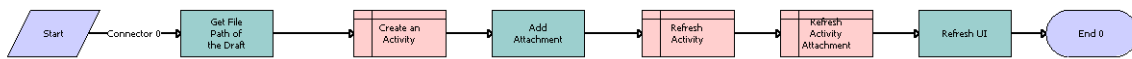


Figure 14. Auto CF Activity Attachment Workflow Process

**Workflow Process Description.** This workflow process performs the following actions:

- 1 GetFilePath.** This step retrieves the file path of the vehicle return receipt.
- 2 Create an Activity.** This step creates an Activity record.
- 3 Add Attachment.** This step adds the receipt as an attachment to the Activity record.
- 4 Refresh Activity.** This step refreshes the Activity applet.
- 5 Refresh Activity Attachment.** This step refreshes the Activity Attachment applet.
- 6 Refresh UI.** This step refreshes the user interface.

## Auto Dealer Vehicle Purchase Workflow Process

This workflow process creates an order for the dealer to purchase the vehicle. It is triggered when the user clicks the Purchase Vehicle button on the Vehicle Purchase screen.

This workflow process is shown in [Figure 15](#).

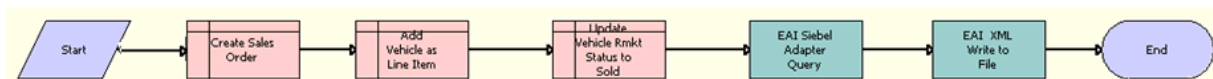


Figure 15. Auto Dealer Vehicle Purchase Workflow Process

**Workflow Process Description.** This workflow process performs the following actions:

- 1 Create Sales Order.** This step creates the Sales Order record with purchasing dealer in the Account field.
- 2 Add Vehicle as Line item.** This step adds a Line Item record for the order, with the purchased vehicle and its sale price.
- 3 Update Rmkt Status to Sold.** This step updates the remarketing status of the vehicle as Sold.

- 4 **EAI Siebel Adapter Query.** This step queries the Sales Order and gets output as a hierarchy of Sales Order and Sales Order Line Item.
- 5 **EAI XML Write to File.** This step writes the hierarchy as an XML file.

## Auto CF EOT Account States Vehicle Dealer Turn In Workflow Process

This workflow process sets the financial account's State to Actual Turn In. It is triggered when a Vehicle Turn In record is created in the Vehicle Return Manager screen of the Dealer portal.

This workflow process is shown in [Figure 16](#).

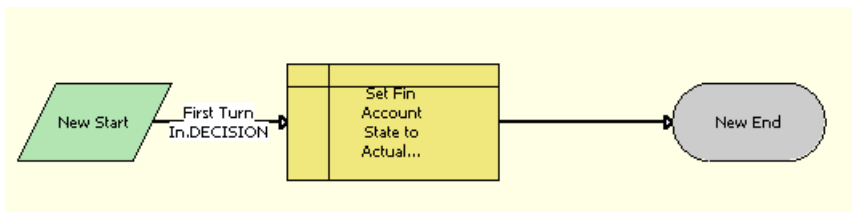


Figure 16. Auto CF EOT Account States Vehicle Dealer Turn In Workflow Process

**Workflow Process Description.** This workflow process performs the following action:

- **Set Fin Account State to Actual Turn In.** This step sets the financial account state to Actual Turn In, by inserting a record in FINS CF Account State.

## Auto VehiclePublishForPurchaseORAuction Workflow Process

This workflow process either sets the PublishToOtherDlrsFlag to Y or sets the Remarketing Status to Available for Auction for turned-in vehicles, depending on the number of days passed. It is triggered once everyday by a scheduled job.

This workflow process is shown in [Figure 17](#).

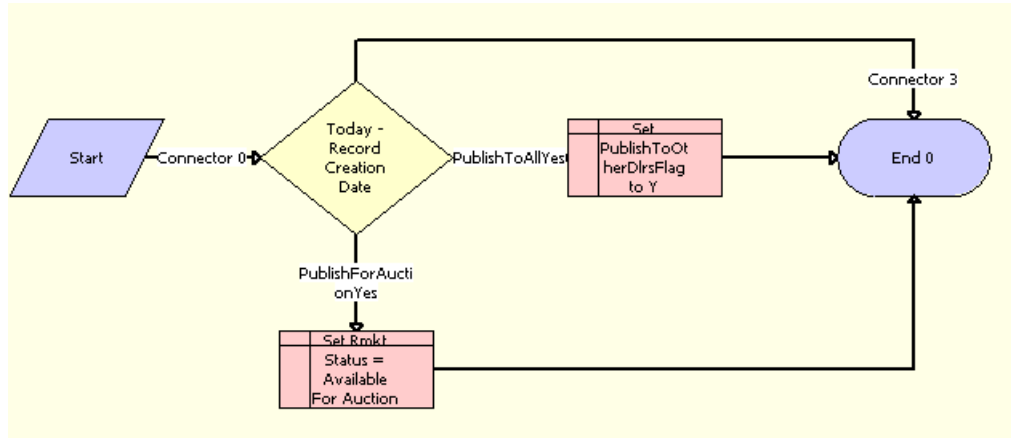


Figure 17. Auto Vehicle Publish For Purchase OR Auction Workflow Process

**Workflow Process Description.** This workflow process performs the following actions:

- 1 **Today-Record Creation Date.** This step checks if the current date minus the record’s turn in date is equal to a number specified by the automotive company. This number defaults to 3, but it can be changed by changing the workflow process property NumDaysPublishToAll.
- 2 **PublishToAllYes (condn).** This step checks if the current date minus record turn in date is equal to a number specified by the automotive company. This number defaults to 3, but it can be changed by changing the workflow process property NumDaysPublishToAll.
- 3 **Set PublishToOtherDirFlag to Y.** This step sets the PublishToOtherDirFlag to Y. This makes the Vehicle visible to Dealers other than the original turn-in dealer that are in the same territory.
- 4 **PublishForAuctionYes (condn).** This step checks if the current date minus the record’s turn in date is equal to a number specified by the automotive company. This number defaults to 10, but it can be changed by changing the workflow process property NumDaysForAuction.
- 5 **Set Rmkt Status as Available For Auction.** This step sets the value of Rmkt Status to Available For Auction.

## Auto CF Auction Vehicle List Workflow Process

This workflow process is responsible for generating a list of vehicles that is planned for an auction event.

This workflow process is shown in [Figure 17](#).

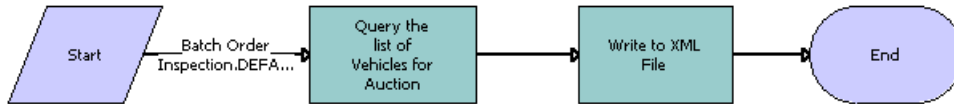


Figure 18. Auto CF Auction Vehicle List Workflow Process

**Workflow Process Description.** This workflow process performs the following actions:

- 1 Query the list of Vehicles for Auction.** This step finds all the vehicles, which need to be sent to an auction house. Uses the EAI Siebel Adapter service to query the vehicles.
- 2 Write to XML File.** This step gets the list of vehicles from the previous step and writes that list to an XML file.

## eAuto Vehicle Return Inspection Report Workflow Process

The purpose of this workflow process is to view the attached vehicle inspection report.

This workflow process is shown in [Figure 19](#).

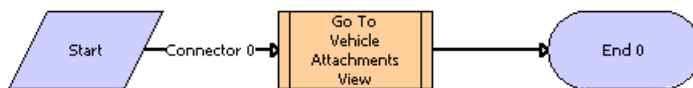


Figure 19. eAuto Vehicle View Inspection Report Workflow Process

**Workflow Process Description.** This workflow process performs the following action:

- **Go To Vehicle Attachment View.** This step is used to call a sub process, eAuto Vehicle Go To View.

## eAuto Vehicle Go To Vehicle Attachments View Workflow Process

The purpose of this workflow process is to navigate to the eAuto Vehicle Attachment view and retrieve the attachments for the asset.

This workflow process is shown in [Figure 20](#).



Figure 20. eAuto Vehicle Go To View Workflow Process

**Workflow Process Description.** This workflow process performs the following actions:

- 1 **Go To View.** This step navigates to the eAuto Vehicle Attachment view if the Vehicle Id is not Null.
- 2 **Query for the Asset.** This step queries for the Vehicle Id in the eAuto Vehicle Attachment view.

## Auto CF Asset Pricing Procedure Workflow Process

The purpose of this workflow process is to price a vehicle set for Auction.

This workflow process is shown in [Figure 21](#).

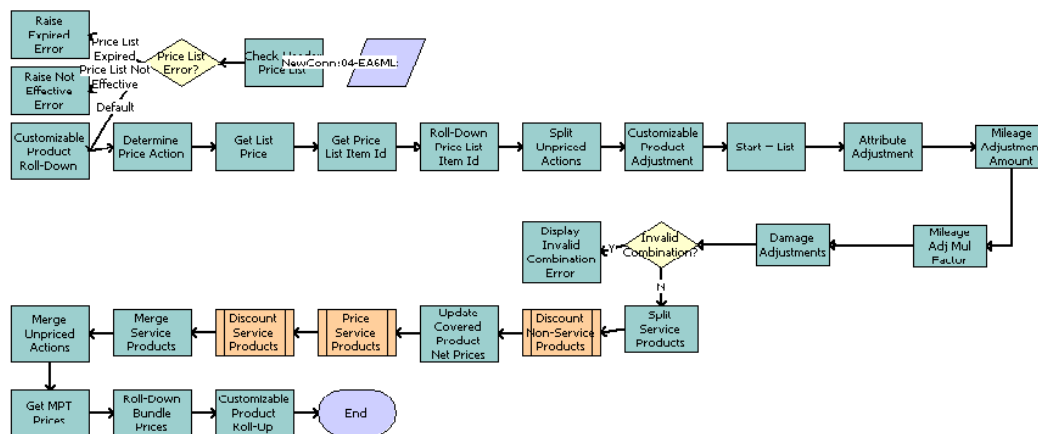


Figure 21. Auto CF Asset Pricing Procedure Workflow Process

**Workflow Process Description.** The workflow process uses the Dynamic Pricing Procedure workflow process as its basis. For more information about the Dynamic Pricing Procedure workflow process, see *Siebel Pricing Administration Guide*. The following steps are added to this workflow process:

- 1 **Mileage Adjustment Amount.** This step applies mileage adjustments based on the adjustment amount configured in the discount matrix.
- 2 **Mileage Adj Mul Factor.** This step applies mileage adjustments based on the multiplication factor specified for a product.



- 3 **Damage Adjustments.** This step applies damage adjustments based on the damage amount and damage benchmark of a vehicle.

## Web Service Reference for Vehicle Remarketing

Vehicle remarketing provides the following Web services:

- [“Inspection Request Web Service” on page 81](#)
- [“Inspection Report Web Service” on page 82](#)
- [“Vehicle Market Value Web Service” on page 84](#)
- [“Vehicle Residual Value Web Service” on page 85](#)
- [“Auction List Web Service” on page 87](#)
- [“Pre Term Campaign Vehicle List Web Service” on page 88](#)

### Inspection Request Web Service

Use this outbound Web service to send a list of financial accounts that are scheduled for turn-in to the inspection services agency.

#### Inspection Request Message Description

For a description of this request message, see [Table 6](#).

Table 6. Inspection Request Message

Node	Description	Type
FinancialAccountNo	Customer's financial account number	String
VIN	Turn-in vehicle's identification number	String
PrimaryContactFirstName	Customer's first name	String
PrimaryContactLastName	Customer's last name	String
PrimaryContactHomePhoneNo	Customer's home phone number	String
PrimaryContactMobilePhoneNo	Customer's mobile phone number	String
MaturityDate	Date when the lease expires	DateTime
TurnInDate	Date vehicle is scheduled for turn-in	DateTime
TurnInMileage	Current odometer reading	Number
DealerName	Name of the dealer where the vehicle will be turned in	String

Table 6. Inspection Request Message

Node	Description	Type
DealerState	State where the dealer is located	String
Street	Street address of the customer	String
City	Name of the city where customer lives	String
State	Name of the State	String
Zip Code	Zip code of the address	String
Country	Name of the country	String

## Inspection Request Web Service Application Interface

This topic describes the application objects called by the this Web service.

### Data Object (Integration Object)

For a description of data objects for this Web service, see [Table 7](#).

Table 7. Inspection Request Web Service Data Objects

Siebel Repository Name	External Name
FinsCfVehicleBatchOrderInspectionInterface	FINS CF Vehicle Batch Order Inspection

## Inspection Report Web Service

Use this inbound web service to receive the inspection results from the inspection services agency.

### Inspection Report Web Service Operations

For a list of operations associated with this Web service, see [Table 8](#).

Table 8. Inspection Report Web Service operations

Name	Description
VehicleInspectionReportInsert	Creates a inspection report record for the vehicle
VehicleInspectionReportInsertOrUpdate	Creates or updates a inspection report record for the vehicle
VehicleInspectionReportUpdate	Updates a inspection report record for the vehicle
VehicleInspectionReportDelete	Deletes a inspection report record for the vehicle

## Inspection Report Message Description

This message contains the inspection results received from the inspection services agency. For a description of this message, see [Table 6](#).

Table 9. Inspection Report Message

Name	Description	Type
AccountNumber	Customer's Financial account number	String
ContactFirstName	Customer's first name	String
ContactLastName	Customer's last name	String
ContactHomePhoneNo	Customer's home phone number	String
ContactMobilePhoneNo	Customer's mobile number	String
VIN	The turn in vehicle identification number	String
DealerName	The dealer location where the vehicle will be turned in	String
OdometerReadingatCurrent	The odometer reading when the inspection occurs	Number
InspectedDate	The date when the vehicle inspected	DateTime
ReceivedDate	The date the inspection report is received	DateTime
Status	The status of the vehicle	String
LargeDDS	Large Dings, Dents, Scratches number	Number
LargeDDSCharge	Large Dings, Dents, Scratches charge	Currency
SmallIDDS	Small Dings, Dents, Scratches number	Number
SmallIDDSCharge	Small Dings, Dents, Scratches charge	Currency

## Inspection Report Web Service Application Interface

This topic describes the application objects called by the this Web service.

### Service Object (Business Service or Workflow Process)

For a description of the service objects for this Web service, see [Table 10](#).

Table 10. Inspection Report Web Service Application Interface

Name	Boundary Object Type
Vehicle Inspection Report Service	Business Service

### Data Object (Integration Object)

For a description of data objects for this Web service, see [Table 7](#).

Table 11. Inspection Report Web Service Data Objects

Siebel Repository Name	External Name
IntegFinsCfVehicleInspectionReportInterface	FINCORP Account

## Vehicle Market Value Web Service

Use this inbound Web service to receive the market value of the vehicle from third party organizations such as Black Book and Kelley Blue Book.

### Vehicle Market Value Web Service Operations

For a list of operations associated with this Web service, see [Table 8](#).

Table 12. Vehicle Market Value Web Service operations

Name	Description
FairMarketValueInsert	Creates a fair market value record for the vehicle
FairMarketValueInsertOrUpdate	Creates or updates a fair market value record for the vehicle
FairMarketValueUpdate	Updates a fair market value record for the vehicle
FairMarketValueDelete	Deletes a fair market value record for the vehicle

### Vehicle Market Value Message Description

For a description of this message, see [Table 6](#).

Table 13. Request Message: FairMarketValueInsert

Name	Description	Type
ProductName	Name of the product for which the market values are populated	String
FairMarketValue	Fair market value of the product/vehicle	Currency
Wholesalevalue	Value paid by dealer for the purchase of a vehicle	Currency
RetailValue	Value paid by customer for the purchase of a vehicle	Currency
Msrp	Manufacturer's Suggested Retail Price- Cost of vehicle when it was new	Currency

Table 13. Request Message: FairMarketValueInsert

Name	Description	Type
StartMileage	Mileage at the beginning of the lease	Number
EndMileage	Mileage at the end of the lease	Number
StartDate	Date the lease began	Date
EndDate	Date the lease ended	Date

## Vehicle Market Value Web Service Application Interface

This topic describes the application objects called by the this Web service.

### Service Object (Business Service or Workflow Process)

For a description of the service objects for this Web service, see [Table 10](#).

Table 14. Vehicle Market Value Web Service Application Interface

Name	Boundary Object Type
Vehicle Market Value Service	Business Service

### Data Object (Integration Object)

For a description of data objects for this Web service, see [Table 7](#).

Table 15. Vehicle Market Value Web Service Data Objects

Siebel Repository Name	External Name
IntegFinsCfVehicleMarketValueInterface	FINS CF Fair Market Value FMV Admin

## Vehicle Residual Value Web Service

Use this inbound web service to receive the residual value the product/vehicle from a third party organization such as Black Book or Kelley Blue Book.

## Vehicle Residual Value Web Service Operations

For a list of operations associated with this Web service, see [Table 8](#).

Table 16. Vehicle Residual Value Web Service operations

Name	Description
ResidualValueInsert	Creates a residual value record for the vehicle
ResidualValueInsertOrUpdate	Creates or updates a residual value record for the vehicle
ResidualValueUpdate	Updates a residual value record for the vehicle
ResidualValueDelete	Deletes a residual value record for the vehicle

## Vehicle Residual Value Message Description

This message contains the residual value details of the product/vehicle received from the 3rd party organization. For a description of this message, see [Table 6](#).

Table 17. Vehicle Residual Value Message

Name	Description	Type
ProductName	Name of the product for which the residual values are populated	String
ResidualValue	Residual value of the product/vehicle	Currency
Terms	The number of months in the lease (12, 24, 36, 48, 60, 72)	String
StartMileageRange	The starting mileage	Number
EndMileageRange	The ending mileage	Number
MileageAllowance	The yearly mileage allowance in the lease	Number

## Vehicle Residual Value Web Service Application Interface

This topic describes the application objects called by the this Web service.

### Service Object (Business Service or Workflow Process)

For a description of the service objects for this Web service, see [Table 10](#).

Table 18. Vehicle Residual Value Web Service Application Interface

Name	Boundary Object Type
Vehicle Residuals References Service	Business Service

### Data Object (Integration Object)

For a description of data objects for this Web service, see [Table 7](#).

Table 19. Vehicle Residual Value Web Service Data Objects

Siebel Repository Name	External Name
IntegFinsCfVehicleResidualsReferenceInterface	FINS CF Vehicle Residuals Reference Data

## Auction List Web Service

Use this outbound Web service to send a list of vehicles that is planned for an auction event. The list will be sent to the auction house.

### Auction List Message Description

This message contains the details about a list of vehicles that is planned for an auction event. For a description of this request message, see [Table 6](#).

Table 20. Auction List Message

Name	Description	Type
VIN	Vehicle Identification number	String
Make	Make of the vehicle; for example, BMW or Honda	String
Model	Model of the vehicle; for example, Accord	String
Trim	Trim of the vehicle; for example, LS, LX	String
Door	Number of doors on the vehicle	String
ExteriorColor	Exterior color of the vehicle	String
ResalePrice	The price of the vehicle	Currency
EventId	Unique identification number for the event	String
EventType	The name value associated with the Event Type Code; options are Open, Close, Online, Employee Sale	String
EventSubType	Delineates the subtype of the event; options differ depending on event type	String
EventStatus	Status of the event	String
EventDate	Date the event is being held	Date
EventPriceList	The price list for the auction event	String
AuctionId	The ID of the auction house that is conducting the event	String

Table 20. Auction List Message

Name	Description	Type
AuctionName	The name associated with the Auction ID	String
AuctionCancelDate	Date user changed the event's status to Cancelled	Date
AccountTeam	The account team of the auction house	String

## Data Object (Integration Object)

For a description of data objects for this Web service, see [Table 7](#).

Table 21. Auction List Web Service Data Objects

Siebel Repository Name	External Name
IntegFinsCfVehicleListForAuction	Auto Remarket Auction Event

## Pre Term Campaign Vehicle List Web Service

Use this inbound Web service to update any reading for assets (vehicles). When you use this Web service, the application receives a list of vehicles with a certain mileage threshold.

### Pre Term Campaign Vehicle List Web Service Operations

For a list of operations associated with this Web service, see [Table 8](#).

Table 22. Pre Term Campaign Vehicle List Web Service operations

Name	Description
PreTermCampaignVehicleListInsert	Creates a record for the vehicle with the threshold mileage
PreTermCampaignVehicleListInsertOrUpdate	Creates or updates a record for the vehicle with the threshold mileage
PreTermCampaignVehicleListUpdate	Updates a record for the vehicle with the threshold mileage



## Pre Term Campaign Vehicle List Message Description

This message contains the threshold mileage details for a list of vehicles. For a description of this message, see [Table 6](#).

Table 23. Pre Term Campaign Vehicle List Message

Name	Description	Type
AccountNumber	Financial Account number of the vehicle	String
CurrentMileage	The odometer reading	Number
CurrentMileageRead Date	Date when odometer is read	Date
VIN	Vehicle identification number	String

## Pre Term Campaign Vehicle List Web Service Application Interface

This topic describes the application objects called by the this Web service.

### Service Object (Business Service or Workflow Process)

For a description of the service objects for this Web service, see [Table 10](#).

Table 24. Pre Term Campaign Vehicle List Web Service Application Interface

Name	Boundary Object Type
Pre Term Campaign Vehicle List Service	Business Service

### Data Object (Integration Object)

For a description of data objects for this Web service, see [Table 7](#).

Table 25. Pre Term Campaign Vehicle List Web Service Data Objects

Siebel Repository Name	External Name
IntegFinsCfPreTermCampaignVehicleListInterface	FINCORP Account



# 8

## Managing Collections

This chapter provides information about standard Siebel Automotive functionality for collection management. It consists of the following topics:

- ["About Administering Collections" on page 91](#)
- ["Scenario for Administering Collections" on page 92](#)
- ["Administering Collection Tasks" on page 93](#)
- ["Activating Siebel Automotive Workflow Processes" on page 94](#)
- ["Creating Assignment Rules for Collection Assignments" on page 95](#)
- ["Using Assignment Rules" on page 97](#)
- ["Managing Collections Preferences" on page 98](#)
- ["Managing Collection Correspondence Administration" on page 101](#)
- ["Automating the Cure Process" on page 101](#)
- ["End-User Procedures for Collections" on page 102](#)
- ["Reviewing Account Summary and Related Account Information" on page 103](#)
- ["Managing Collection Reassignments" on page 104](#)
- ["Executing Collection Tasks" on page 104](#)
- ["Capturing Promise-to-Pay Records" on page 105](#)
- ["Managing the Cure Process" on page 107](#)
- ["Managing the Repossession Process" on page 107](#)
- ["Managing Skip Trace and Impound Service Requests" on page 110](#)
- ["Managing Insurance Information" on page 111](#)

**NOTE:** Your company's application configuration and business processes may differ from the procedures or business scenarios presented in the following topics.

### About Administering Collections

Collection is the process of collecting money from customers who are delinquent or are unable to make a payment by a specified date. Collection is a component of the lending cycle and can affect a company's bottom line. Those accounts that a company is unable to collect on must be written off in the end, which reduces the company's profit.

A collection system allows a company to identify delinquent accounts and arrange them into predefined lists so agents can follow up and obtain payment. Many companies group delinquent accounts into three or more buckets, for example, 30 days, 60 days, and 90 days. Each bucket results in a different series of actions. For example, accounts in the 30 days bucket might receive a letter reminding them to pay the outstanding balance. Accounts in the 60 days bucket, however, might get a call from a collection agent to discuss the balance and payment scenarios.

Using the Siebel application, administrators can query and create lists of delinquent accounts based on the number of days the account has been delinquent. Companies can also use the Siebel application in conjunction with third-party systems. For example, if a company uses a third-party system to track delinquent accounts, users can take lists generated by these systems and use the Siebel application to execute collection activities.

Administrators use the procedures in this chapter to set up collection activities, for example creating assignment rules, managing collection preferences and correspondence information, automating the cure process, and enabling workflow processes.

Collection agents, managers, or end users, use the Siebel application to view work summary information about delinquent accounts, execute collection tasks, and record skip trace, bankruptcy, and legal information related to delinquent accounts.

Figure 22 describes the typical administrator and end-user procedures for Collection Management. The administrator first sets up the collection task, then generates a campaign list, and finally sets up a workflow process. End-user procedures include the following: the end user researches delinquent accounts, then executes a collection task, and finally manages skip trace and impound service requests.

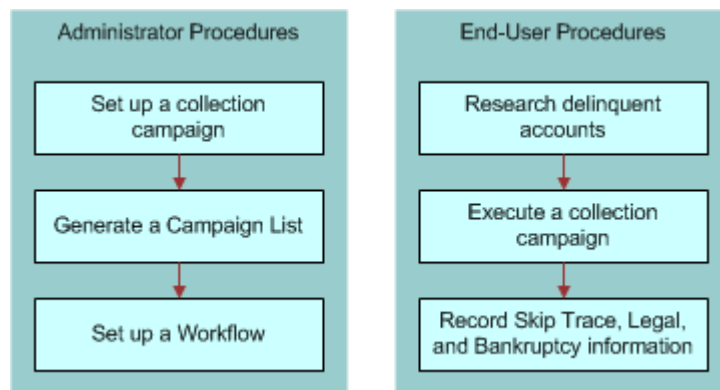


Figure 22. Typical Administrator and End-User Procedures for Collections

## Scenario for Administering Collections

The following business scenario features sample tasks performed by a Siebel administrator and a collection agent. Your company may follow a different workflow according to its business requirements.

## Siebel Administrator Checks for Delinquent Accounts

A Siebel administrator at a bank can use Siebel Automotive to monitor accounts that are 60 days delinquent and create a list of delinquent accounts. The administrator can then assign these accounts his team for collections follow up.

## Bank Collection Agent Contacts Customers

A bank collection agent is calling customers whose accounts are 60 days delinquent. Prior to making her first call, she accesses the Collection Summary view to learn more about the customer's financial accounts and payment history. Her first call is to a customer who is 60 days delinquent on a vehicle loan. The collection agent views additional information by drilling down on the Account Number link.

Using an automatic dialer, the collection agent calls the customer. After the call connects, the collection agent uses the call guide and summary information to explain the purpose of the call. The customer explains his situation to the collection agent and mentions scheduling a payment so the collection agent navigates to the Collections Promise to Pay view to record the promise. In this view, she can select several promises options, including single, two part, or long term. She can also enter the amount and date information for each promise to pay. The collection call ends.

In this scenario, an administrator is responsible for administering the Siebel Automotive application and requires administrative responsibilities to:

- Generate a list of delinquent accounts from either Siebel financial accounts, legacy systems, or Oracle Business Intelligence.

End users are collection agents. They enter information to:

- View summary information about delinquent accounts.
- Execute collection tasks by contacting customers having accounts that are past due and recording customer responses and payment promises.
- Record skip trace, bankruptcy, and legal information related to delinquent accounts.

End user's are also collection managers. They review information to:

- View their agent's work summary information.
- Manage collection reassignments.
- Approve or reject repossession SRs.

## Administering Collection Tasks

Siebel administrators can create a list of customers with delinquent accounts by querying the Siebel application database, or by importing an external list from a third-party application. In addition, the administrators define the collection assignments and reassignments, promise-to-pay preferences, and so on.

As a Siebel administrator, you can generate a delinquency list by:

- **Setting up a workflow process.** Set up a workflow process to calculate the total days due based in the financial account information and assign those accounts to a specific queue or agent. For more information, see *Siebel Business Process Framework: Workflow Guide*.
- **Using Oracle Business Intelligence.** Use Oracle Business Intelligence to track past due accounts and then import the list to the Siebel database. For more information, see *Oracle Business Intelligence Administration Guide*.

Administrator tasks are described in the following topics:

- [“Activating Siebel Automotive Workflow Processes” on page 94](#)
- [“Creating Assignment Rules for Collection Assignments” on page 95](#)
- [“Using Assignment Rules” on page 97](#)
- [“Managing Collections Preferences” on page 98](#)
- [“Managing Collection Correspondence Administration” on page 101](#)
- [“Automating the Cure Process” on page 101](#)

**NOTE:** If you are configuring Siebel Automotive, you cannot enable the following fields for multilingual lists of values: Administration - Collections, screen, Collection Preferences view, PTP Follow-Up applet, Method of Payment field and Administration - Collections, screen, Collection Preferences view, Activity Follow-Up applet, Activity Type field. Both these fields are based on the S\_CF\_PREF.NAME column, which is one of the columns that forms the user key in the table S\_CF\_PREF and thus is a required column. However, this column is configured to store values from picklists that use two different types of lists of values. There is no LOV type specified on this column, so it cannot be enabled for multilingual lists of values.

## Activating Siebel Automotive Workflow Processes

You can save time and reduce keystrokes by using workflow processes to automate steps that are repeatedly performed by end users. For more information, see *Siebel Business Process Framework: Workflow Guide*.

Table 26 describes the workflow process types, that is repossession, promise-to-pay, cure process, skip trace, and impound, you can enable for the Siebel Automotive application. Administrators activate the workflow processes from the Administration - Business Process screen, then the Workflow Deployment view.

Table 26. Activating Siebel Automotive Workflow Processes

Process Name	Repossession	PTP	Cure	Skip Trace	Impound
Auto CF Collection - Update Cure Status	Not applicable	Not applicable	YES	Not applicable	Not applicable
Auto CF Collection - Calculate DueDate Process	Not applicable	YES	YES	Not applicable	Not applicable

Table 26. Activating Siebel Automotive Workflow Processes

Process Name	Repossession	PTP	Cure	Skip Trace	Impound
Auto CF Collection - Update PTP Broken Flag Process	Not applicable	YES	Not applicable	Not applicable	Not applicable
Auto CF Collection - Update PTP Data Process	Not applicable	YES	Not applicable	Not applicable	Not applicable
Auto CF Repossession Approval Request Process	YES	Not applicable	Not applicable	Not applicable	Not applicable
Auto CF Repossession Approved Process	YES	Not applicable	Not applicable	Not applicable	Not applicable
Auto CF Repossession Denied Process	YES	Not applicable	Not applicable	Not applicable	Not applicable
Auto CF Repossession Package Sent Process	YES	Not applicable	Not applicable	Not applicable	Not applicable
Auto CF Skip Impound Activity Process		Not applicable	Not applicable	YES	YES
Auto CF Update Follow-up Date Process	YES	YES	YES	Not applicable	Not applicable

## Creating Assignment Rules for Collection Assignments

Within the Siebel application, the financial account is one of the data elements used to identify a lease or loan relationship with a customer. When a financial account becomes delinquent it becomes the responsibility of a collections agent. Administrators set up a workflow process to calculate the total days due based in the financial account information and assign those accounts to a specific queue or agent. For more information about setting up workflow processes, see *Siebel Business Process Framework: Workflow Guide*.

All changes to accounts can be done in real-time by using Assignment Manager. The Siebel administrator can set up different criteria, for example Days Past Due, that is then used for assigning financial account information to a collector. Administrators first create assignment rules and then verify the rules in Collections - Assignments view.

For more information about assignment rules, see *Siebel Assignment Manager Administration Guide*.

To create assignment rules, first you must activate the financial account, then you create the rule criterion for when an account is past due and so on. Perform the following procedures to create assignment rules for collection assignments.

### To add assignment rules

- 1 Navigate to Administration - Assignment screen, then the Territories view.

- To add a territory, in the Territories list, click New and complete the necessary fields. Some fields are described in the table that follow.

Field	Comments
Territory Name	Name of the territory assignment rule. For example, Rule1_AutoCF
Objects to be Assigned	Financial Account
Activation	Set this to the current date of activation

- To associate criteria to the rule, in the Criteria list, select New and complete the necessary fields. Some fields are described in the table that follow.

Field	Comment
Rule Criterion	For example, Days Past Due or Related Financial Accounts Days Past Due
Inclusion	Include
Score	For example: 100, 0, or 80  Based on scores, financial accounts are assigned to different collection agents. For more information about scores, see <i>Siebel Assignment Manager Administration Guide</i> .

- To associate values to the past due rule, in the Values list, click New and complete the necessary fields. Some fields are described in the table that follow.

Field	Comment
Days Past Due Low	Enter the minimum amount of days that the financial account is past due, for example: 30.
Days Past Due High	Enter the maximum amount of days that the financial account is past due, for example: 45.

- To associate positions to the rule, in the Positions list, click New.
- In the Add Positions dialog box, select the employee you want to associate with the past due rule.



**To view assignment rules**

- 1 Navigate to Administration - Collections screen, then the Collections Assignment view.
- 2 In the Collections Assignments list, click Query.
- 3 In the Assignment field, query for the Territory name you previously created. For example, Rule1\_AutoCF
- 4 If the record is present, your assignment rule is created.

You can modify the assignment rules at this time.

**NOTE:** You must be logged in as a collections manager or administrator to verify the rules created in the Assignment Administrator view.

## Using Assignment Rules

After you have created the assignment rules, you must release them by performing the procedure that follows. Releasing assignment rules activates the rules and make them usable, they will not assign accounts based on rules however. For more information on assignment rules, see *Siebel Assignment Manager Administration Guide*.

**To release assignment rules**

- 1 Navigate to Administration - Collections screen, then the Collections Assignments view.
- 2 In the Collections Assignments list, click Query.
- 3 In the Assignment field, query for the Territory name you want to use. For example, Rule1\_AutoCF.
- 4 Click the Release button on the Collections Assignments applet

This rule is now activated. The rule can also be released from the Administration - Assignment screen, Territories view where it is created.

**To assign accounts according to active assignment rules**

- 1 Using the start task command, enter the following command to assign accounts according to the rules created:

```
"start task for comp AsgnBatch with AsgnMode="MatchAssign",
```

```
AsgnObj Name="Financial Account", Obj WhereClause="where ASSET_NUM LIKE 'ACCOUNT  
NAME' "
```

where the *ACCOUNT NAME* is the name of the financial account.

- 2 If you want to assign all financial accounts which have names like "Collections1", "Collections2", "Collections3", and so on, the command would be as follows:

```
Start task for comp AsgnBatch with AsgnMode="MatchAssign", AsgnObj Name="Financial
```

Account", ObjWhereClause="where ASSET\_NUM LIKE 'Collections%' "

This assigns all accounts selected by the query in the statement based on all current active assignment rules.

**To verify that the financial accounts are assigned**

- 1 Navigate to the Administration - Collections screen, then the Collections Reassignment view.
- 2 In the Employee list, Position field query to find the position.  
For example, Managing Collections - Managing Collections Preferences
- 3 Verify the First Name and Last Name field.

When you select the record in the Employee list, the accounts that are associated with the positions appear on the bottom of the screen.

## Managing Collections Preferences

Siebel administrators use this screen to define and update factors that determine how the collections process is executed, for example promise-to-pay preferences, PTP excluded dates, PTP followup dates, and default followup activities.

Table 27 describes the types of information, that is Preferences, PTP Follow-Up, PTP Excluded Dates, and Activity Follow-Up, that appears in the Collection Summary view.

Table 27. Collection Preferences View

Summary	Comments
Preferences	Describes the promise to pay preferences, for example dollar amount and time tolerance for the financial account.
PTP Follow-Up	Defines the followup days for broken PTP by method of payment.
PTP Excluded Dates	Lists the promise to pay excluded dates. Administrators can add dates to define the collections preferences of their companies.
Activity Follow-Up	Describes the followup activities, for example Inbound or Outbound Call.

**To set up a promise-to-pay tolerance amount**

- 1 Navigate to the Administration - Collections screen, then the Collections Preferences view.

- In the Preferences form, complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Tolerance Amount	The Tolerance Amount is the least amount of payment that the collection agent will tolerate from the customer. How much Tolerance (in Amount and percent) can be given for a Promise to Pay for various accounts. Based on this tolerance, promise-to-pays can be broken if the amount received is in the limits of the tolerance on promised date. Therefore, the Tolerance Amount is a check to evaluate if PTP records are broken or not. The amount is the limit of tolerance.
Maximum Days in Future	10 (Promise-to-Pay Due Date Validation)
Not Today, Not on Sunday, Not on Saturday check boxes	Promise-to-Pay Due Date Validation
Min Days before Cure	Cure Process, Cure Duration (Days) For example 55
Wait before follow up	Repossession For example 2
Replace existing position	Manual Assignment Preferences Checked

**To view system preferences for the Collections processes**

- Navigate to the Administration- Application screen, then the System Preferences view.
- In the System Preferences list, query for \*CF\*.

Collections Processes that have already been set up appears as described in the following table.

System Preference Name	System Preference Value
CF_CURE_DURATION	10
CF_CURE_TOLERANCE_DAYS	55
CF_PTP_FUTURE_DAYS_MAX	10
CF_PTP_NOT_SATURDAY	Y
CF_PTP_NOT_SUNDAY	Y
CF_PTP_NOT_TODAY	Y

System Preference Name	System Preference Value
CF_PTP_TOLERANCE_AMNT	1.00
CF_REPLACE_EXIST_POS	Y
CF_REPO_FOLLOW_UP	2

**To set up PTP excluded dates**

- 1 Navigate to the Administration - Collections screen, then the Collections Preferences view.
- 2 In the PTP Excluded Dates list, create a new record and complete the necessary fields.  
Some fields are described in the following table.

Field	Example
Name	Christmas
Excluded Date	12/25/05

**To set up a promise to pay followup definition**

- 1 Navigate to the Administration - Collections screen, then the Collections Preferences view.
- 2 In the PTP Follow-Up list, create a new record and complete the necessary fields.  
Some fields are described in the following table.

Field	Examples
Method of Payment	Western Union, Cheque by Phone, Mail, Overnight Mail.
Number of Days	The default is set to 1.

**To set up an activity followup definition**

- 1 Navigate to the Administration - Collections screen, then the Collections Preferences view.
- 2 In the Activity Follow-Up list, create a new record and complete the necessary fields.  
Some fields are described in the following table.

Field	Examples
Activity Type	Call - Inbound, Call Outbound, and so on
Activity Disposition	Left Message, No Answer, PTP, or Other.
Number of Days	The default is set to 1.

# Managing Collection Correspondence Administration

The information captured in the Correspondence Administration view can be used to automate the cure process. Associated with the financial account, the Collections Correspondence Administration view provides the ability to select and automatically generate predefined correspondence utilizing defined templates and selection criteria.

## To set up correspondence rules

- 1 Navigate to Administration - Collections screen, then the Correspondence Administration view.
- 2 In the Correspondence list, click New and complete the necessary fields.

Some fields are described in the following table.

Fields	Example
Name	CA_Rule1
State	CA
Type of Letter	Cure
Asset Finance	Select any value from the pop up applet
Cure Length	15
Cure Comments	Letter sent only once
Bankruptcy	Active
Recipient	Holder
Template	Template for Cure

## Automating the Cure Process

Letters can be generated for Cure and Notification of Sales (NOS) events. Triggering letter generation through a button click initiates the business service method to call the cure letter generation. Administrators create the correspondence template and define rules before generating the cure letter and then they monitor accounts that meet cure conditions.

Administrators send cure letters to customers who are in default, typically these type of letters explain that their account is delinquent before initiating a vehicle repossession process. In addition to this type of generic letter, administrators can also send letters for notice of sale after repossessing a car from a customer. Administrators first create a correspondence template for these types of letters using Word. Next they add the template to the Correspondence Templates view and then associate the template to existing rules. To select the appropriate template and generate the letter, perform the procedures that follow.

### *To add correspondence templates*

- 1 Navigate to Administration - Document screen, then the Correspondence Templates view.
- 2 In the Templates list, click New File.
- 3 In the Choose File dialog, select the template file and click Open.
- 4 Repeat [Step 2](#) and [Step 3](#) for each template you want to add.

### *To associate correspondence templates to rules*

- 1 Navigate to Administration - Collections screen, then the Correspondence Administration view.
- 2 Query for the rule that you want to associate the template with, for example Auto\_CF\*.
- 3 Select the record, in the Template field, click the multiple select button to select the correspondence template.
- 4 Repeat [Step 2](#) and [Step 3](#) for each correspondence template you want to associate to a rule.

## End-User Procedures for Collections

Collection agents, managers, or end-users review, understand, and act in the context of controlled, closed loop processes, capturing action and followup dates for each step in the process, compiling a full history of collections interaction with the customer. Because collection agents work with many accounts, they need to be able to quickly review summary account information about a financial account's collection status and contextual access to the appropriate next steps.

The collection agent can then make sure that all delinquent financial accounts for a given customer are assigned to the same collections agent, avoiding misinformation, confusion, and redundant customer contact.

For example, if a customer with multiple accounts appear on two different lists or is assigned to two different positions then the assignment of the second account, the account in the lower bucket is assigned to the collector responsible for the customer's account that falls in the higher bucket.

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

- ["Reviewing Account Summary and Related Account Information" on page 103](#)
- ["Managing Collection Reassignments" on page 104](#)
- ["Executing Collection Tasks" on page 104](#)
- ["Capturing Promise-to-Pay Records" on page 105](#)
- ["Managing the Cure Process" on page 107](#)
- ["Managing the Repossession Process" on page 107](#)
- ["Managing Skip Trace and Impound Service Requests" on page 110](#)
- ["Managing Insurance Information" on page 111](#)

# Reviewing Account Summary and Related Account Information

Before calling an account in a collection task, agents use the Collection Summary list view to review historical information about an account. After logging in to the application, agents go to Work Summary list to check current status and see if it is correct. Likewise, managers review the Manager Work Summary list view to see which accounts have already been assigned and which accounts remain unassigned by agent.

## To view work summaries

- 1 Navigate to the Financial Accounts screen, then the Work Summary view.

The following table describes the types of information appearing in the Manager Work Summary view.

Summary	Comments
Accounts Assigned	Total number of accounts assigned to the collection agent.
Accounts Worked	Number of accounts the collection agent has worked on so far. For example, created PTPs for some accounts, left messages for another account, and so on).
Accounts Remaining	Number of accounts remaining to be worked on.
Messages Left	Total number of messages left by the collection agent on all accounts that they have worked on so far.
Promises Made	Total number of promise-to-pay records created by the collection agent for all the accounts worked on so far.

- 2 Click Refresh to get the most up-to-date work summary information.

## To view manager work summaries

- 1 Navigate to the Financial Accounts screen, then the Manager Work Summary view.
- 2 In the Employees list, select the collection agent you wish to view the work summary for.

The following table describes the types of information appearing in the Manager Work Summary view.

Summary	Comments
Accounts Assigned	Total number of accounts assigned to the selected collection agent.
Accounts Worked	Number of accounts the selected collection agent has worked on so far. For example, created PTPs for some accounts, left messages for another account, and so on).

Summary	Comments
Accounts Remaining	Number of accounts remaining to be worked on by the selected collection agent.
Messages Left	Total number of messages left by the selected collection agent on all accounts that they have worked on so far.
Promises Made	Total number of promise-to-pay records created by the selected collection agent for all the accounts worked on so far.

- 3 Click Refresh to get the most up-to-date work summary information.

#### *To view related accounts*

- 1 Navigate to the Financial Accounts screen, then the Financial Account List view.
- 2 Drill down on the Account Number field link of the selected record.
- 3 Click the Collections view tab, and then click the Related Accounts link.
- 4 Scroll down to the bottom of the page to see the Related Accounts list.
- 5 To view the related account, drill down on the Financial Account Number field link.

## Managing Collection Reassignments

Collection managers use this screen to select and reassign financial accounts in real time.

Workload and skills in the collection department are dynamic. It is often necessary for the manager to reassign one or more financial accounts from one collection agent to another on a temporary or permanent basis, and therefore overriding prior rules based assignment.

#### *To reassign a financial account*

- 1 Navigate to the Administration - Collections screen, then the Collections Reassignment view.
- 2 In the Account Number list, select the records you want to reassign.
- 3 Click Reassign.
- 4 In the Pick Position dialog box, select the employee you would like to reassign the records to, and then click OK.

## Executing Collection Tasks

After agents have reviewed background information about a financial account, they can start the collection tasks by calling the customer. For more information on viewing collection summaries, see [“Reviewing Account Summary and Related Account Information” on page 103](#) and [“Managing Collection Reassignments” on page 104](#).



**To view delinquent accounts**

- Navigate to the Financial Account screen, then the Delinquent Title List view.

**To execute collection tasks**

- 1 Navigate to the Financial Accounts screen, then the Financial Accounts list view.
- 2 Drill down on the Account Number field link, and then click the Collection view tab.
- 3 In the Activities list, create an activity record to record the customer’s response to the collection call.
- 4 If the customer makes a payment promise, enter this information.

For more information about capturing a promise to pay, see [“Capturing Promise-to-Pay Records” on page 105](#).

## Capturing Promise-to-Pay Records

One of the important events in the collections process is capturing a promise to pay (PTP) for delinquent accounts. A PTP is a trackable promised amount of money to be paid by the customer. It includes a planned date of payment, in addition to the expected mode of payment. Breaking a promise represents a breach of trust, and is a flag for immediate escalation of collections activity.

The Siebel Automotive application supports the process of capturing a customer’s PTP, recording the detail, and ensuring follow up to determine whether the promise is kept or broken. Through a workflow in the Siebel application, the system can also determine if a particular promise is broken or not. This requires that payment transactions exist in the Siebel application or are brought into the Siebel application.

Perform the following procedures to a capture promise-to-pay records.

**To record call activities**

- 1 Navigate to the Financial Accounts screen, then the Financial Account List view.
- 2 Drill down on the Account Number field link, and then click the Collection view tab.
- 3 In the Activities list, click New and complete the necessary fields.

Some fields are described in the table that follows.

Field	Examples
Type	Call-Outbound
Description	Enter a description for the activity, for example Call to Adrian Monk for PTP
Sub-Type	Select Left Message

**To record a promise to pay**

- 1 Navigate to the Financial Accounts screen, then the Financial Account List view.
- 2 Drill down the Account Number field link, and then click the Collections view tab.
- 3 In the Collection Summary list, click New and complete the necessary fields.  
Some fields are described in the table that follows.
- 4 Verify that a new activity record is created in the Activities list applet on saving the PTP record in the Collection Summary applet. The fields for this are automatically created activity as described in the following table.

Field	Comments
Type	Call-Inbound or Call-Outbound based on the value selected for the new PTP
Sub-Type	PTP taken
Status	Done

- 5 To record multiple promise-to-pay records, repeat [Step 3](#) and [Step 4](#) for each record.

**To capture a transaction for promise-to-pay records**

- 1 Navigate to the Financial Accounts screen, then the Financial Account List view.
- 2 Drill down on the Account Number field link, and then click the Transaction Detail view tab.
- 3 Click New, and then complete the necessary fields.

Some fields are described in the following table.

Field	Example
Amount	Enter the amount the customer has agreed to pay
Post Date	Current Date
Item Type	How the customer as agreed to pay, for example Check
Item	The Item Number is used to identify the transaction in the transaction details view. The Item Number is the actual Item Number of the Item Type and it needs to be manually entered.

When the transaction is collected that Status changes from Active to Inactive. If the customer only paid a partial amount, the Status stays Active.

**To view an account's promises summary information**

- 1 Navigate to the Financial Accounts screen, then the Financial Account List view.

- 2 Drill down on the Account Number field link, and click the Promises Summary view tab to view more detailed collection information.

## Managing the Cure Process

Companies send cure letters to a customer who is in default, that is their account is delinquent, before initiating vehicle repossession process. In addition to this letter, companies also send a letter for notice of sale after repossessing a car from the customer. The requirement for sending the different types of letters is driven by state government legislations. Through a letter administration view, Siebel collection agents can provide a captive to capture the rules and templates for these letters.

Through parameters set in Collections Administration, time fences and activities which vary state by state are defined. Correspondence is then initiated by the collection agent, triggering a business process that validates applicability, timing, selection of the proper template, and generation of the letter.

### *To generate the cure process*

- 1 Navigate to the Financial Accounts screen, then the Financial Account List view.
- 2 Drill down on the Account Number field link for the selected record.
- 3 Click the Collections view tab, and then click the Correspondence link.
- 4 In the Correspondence list, select the record and click Generate Cure Letter.  
Letter gets generated and a record gets created in the Correspondence.

### *To generate notice of sale letter*

- 1 Navigate to the Financial Accounts screen, then the Financial Account List view.
- 2 In the Financial Accounts list, query for the account for whom the letter for notice of sale needs to be generated, and then drill down on the Account Number field link.
- 3 Click the Collections view tab, and then click the Correspondence link.
- 4 In the Correspondence list, select the record and then click Generate NOS Letter.

## Managing the Repossession Process

A vehicle is repossessed when it is determined that due payments cannot be recovered from a customer. A collection agent first determines if repossession should happen. Before repossession is initiated, multiple steps of promise to pay (PTP) and Cure Letter generation must have been executed. A senior collection agent or collection manager must approve the repossession process. An external agency executes the repossession of vehicles.

**NOTE:** You cannot add new repossession agencies in the Repossession Agencies view. The only way to add new agencies is from the Partner List view.

**To add repossession partners**

- 1 Navigate to the Partners screen, then the Partner List view.
- 2 In the My Partners list, click new and complete the necessary fields.
- 3 To verify that the partner was added, navigate to Repossession screen, then the Repossession Agencies view, and in the My Agencies list, query for the Repossession partner created in [Step 2](#).

**To add an agency employee**

- 1 Navigate to the Repossessions screen, then the Repossessions Agencies view.
- 2 In the My Agencies list, select or query for the agency for which you need to add an employee to.
- 3 Drill down on the Agency Name field link, and then click the Agency Employees view tab.
- 4 Click new and complete the necessary fields.

**To add repossession SRs**

- 1 Navigate to the Financial Accounts screen, then the Financial Account List view.
- 2 Drill down on the Account Number field link, and then click the Collections view tab.
- 3 Click the Repossessions SR link.
- 4 In the Repossessions SR list, click new and complete the necessary fields.

Some fields are described in the following table.

Field	Example
Send to For Approval	Login Person's Manager
Repossession Agency	The name of the agency
Area	Rep Vehicle
Sub Area	Rep Vehicle
Asset Number / VIN	This is a vehicle identification number (VIN) that gets populated from the financial account record.

- 5 To view the Repossessed Vehicle, drill down on the SR Number field link.

**To create another activity to continue repossession for the SR**

- 1 Navigate to the Service Request screen, then the Service Requests List view.
- 2 Drill down on the SR Number field link, and then click the Repossess Vehicle view tab.
- 3 In the Activities list, query for Sub-Type: Rep Denied and Type: Request for Repossession.

- 4 Click New, and complete the necessary fields.

Some fields are described in the following table.

Field	Example
Type	RepApproval Request
Description	Continuing repossession after reviewing account again... please approve this time!
Priority	1-High
Owner	Collection Manager

***To record details about the repossession service request***

- 1 Navigate to the Service Request screen, then the Service Requests List view.
- 2 In the My Service Request list, query for the SR Number, account, summary that you want to approve.  
For example, in the Summary field query for \*Rep\* to find accounts that have been repossessed.
- 3 Drill down on the SR Number field link, and then click the Repossess Vehicle view tab.
- 4 In the Activities list, in the Type field query for type of detail you want to record.
- 5 To approve, in the Sub-Type field, select Repossession Approved.
- 6 To deny the Approval Request, change Sub-Type field to Denied.
- 7 To send a package, the Sub-Type field, select Package Sent.

***To complete repossession process***

- 1 Navigate to the Activities screen, then the Activities List view.
- 2 In the Type field, query for Follow-Up.
- 3 In the Status drop-down list, select Done.
- 4 Navigate to Financial Accounts screen, then the Financial Account List view.
- 5 Drill down on the Account Number field link for the account you wish to view.
- 6 Click Collections screen, then the Repossession SRs.
- 7 In the Repossessions SRs list, click New and complete the necessary fields.

Some fields are described in the following table.

Field	Example
Repossession Fee	\$2902
Repossession Date	Current date

# Managing Skip Trace and Impound Service Requests

Collection agents can use the following view tabs to record skip trace, bankruptcy, and legal information:

- **Skip Trace.** Companies who are unable to contact or locate a delinquent customer, rely on a skip trace agency to track down a customer. End users can use the Skip Trace view tab to record the results of skip trace report.

Skip Trace has been created with an associated template for capture of details required to initiate skip trace activities internally or externally. Association with Siebel Activity Plans enables automatic creation of default activities associated with the Skip Trace process. Assignment Manager operates on Skip Trace SR and associated activities to assign the appropriate Internal or external resources.

- **Impound.** Occasionally an government agency seizes a vehicle for various reasons, for example if a vehicle is used for illegal purposes. At other times a customer may abandon a vehicle somewhere or not pick up a vehicle from a repair shop. During this time, the government agencies or repair shop informs the finance company (legal owner of vehicle when a vehicle is leased) and the finance company then manages the process of securing the vehicle.
- **Bankruptcy.** If a customer files for bankruptcy, end users can use the Bankruptcy view tab to track bankruptcy information.
- **Legal.** If a customer account becomes delinquent, end users can use the Legal view tab to track information about delinquent accounts.

Most delinquent account situations are resolved through initial contact with the customer, acceptance and fulfillment of a promise to pay (PTP). However seriously delinquent accounts present additional challenges to companies and often require legal or outside-party involvement. There are four primary directions to take as follows:

- **Referral to an outside collections agency.** For more information, see the procedure on how to assign a service request to a outside partner that follows.
- **Initiation of skip trace activities.** An example of a skip trace activity is trying to locate a debtor who cannot be reached through existing contact information. For more information, see the procedure on record skip trace information that follows.
- **Processing impound notifications.** Often impound notifications arise when physical possession of a vehicle against which collections activities are in process, for example abandonment at a repair facility or impound by police. For more information about impound service requests, see ["To record impound information" on page 111](#).
- **Repossession of the vehicle from the debtor.** For more information about repossessing vehicles, see ["Managing the Repossession Process" on page 107](#).

## *To record skip trace information*

- 1 Navigate to the Financial Accounts screen, then the Financial Accounts List view.
- 2 In the Financial Accounts list, query to find the account you want to record skip trace information.

- 3 Drill down on the Account Number field link, and then click the Collections view tab screen, then the Skip Trace SRs link.
- 4 In the Skip Trace list, click New and complete the necessary fields.

**To record impound information**

- 1 Navigate to the Financial Accounts screen, then the Financial Accounts List view.
- 2 In the Financial Accounts list, query to find the account you want to record skip trace information.
- 3 Drill down on the Account Number field link, and then click the Collections view tab, then the Impound SRs link.
- 4 In the Impound SR list, click New and complete the necessary fields.

Some fields are described in the table that follows.

Field	Comments
Summary	Add a summary for the Impound SR, for example Impound initiated for customer ABC.
Asset Number	The Serial Number of the selected record that appears in the field.  Select the appropriate Asset Number.

- 5 To enter vehicle information, drill down on the SR Number field link.
- 6 In the Auto CF Impound Vehicle Request form, complete the necessary fields.

Some of the fields might already be filled, in that case, verify that the vehicle information is correct.

**To record legal information related to a delinquent account**

- 1 Navigate to the Financial Accounts screen, then the Financial Accounts List view.
- 2 In the Financial Accounts list, drill down on the Account Number field link you want to view.
- 3 Click the Legal view tab.
- 4 In the Legal form, complete the necessary fields.

## Managing Insurance Information

Companies must track the insurance policy associated with the vehicle. Absence of a valid insurance policy triggers activity, often thought the collections organization, to contact the customer and secure proof of insurance, or ultimately to secure insurance of the customer's behalf at the customer's expense. Using the Siebel Automotive application, collection agents keep track of a customer's insurance policy by associating the insurance policy to a financial account.

***To associate insurance policies with financial accounts***

- 1 Navigate to the Financial Accounts screen, then the Financial Accounts List view.
- 2 In the Financial Accounts list, drill down on the Account Number field link you want to view.
- 3 Click the Collection view tab, and then click the Insurance link.
- 4 In the Insurance list, create a new record and complete the necessary fields.

Some of the fields are described in the table that follows.

Field	Comments
Start Date	Enter the current date and time.
Expiration Date	Enter a future date.
Has Needed Coverage	Checking this check box indicates that the account has needed coverage.
Deductible Below Maximum	Checking this check box indicates that the account deductible is below maximum.
Number	Example Potter1213
Company Name	Select the company name of the insurance company for the account.

***To add insurance contact information to financial accounts***

- 1 Navigate to the Financial Accounts screen, then the Financial Accounts List view.
- 2 Select the financial account you which you add insurance contact information to.
- 3 In the Financial Accounts form, click New and complete the necessary fields.



# 9

## Managing Vehicles

This chapter provides information about standard Siebel Automotive functionality for vehicle management. It consists of the following topics:

- [“Vehicles in Siebel Automotive” on page 113](#)
- [“Scenario for Working with Vehicles” on page 113](#)
- [“Vehicles Process Workflow” on page 114](#)
- [“Entering Vehicle Records” on page 114](#)
- [“Process of Managing Vehicle Records” on page 115](#)
- [“Editing a Vehicle Record” on page 115](#)
- [“Changing Vehicle Status” on page 115](#)
- [“Deleting a Vehicle” on page 116](#)
- [“Updating Vehicle Service History” on page 116](#)
- [“Managing Vehicle Financial Details” on page 117](#)

**NOTE:** Your company's application configuration and business processes may differ from the procedures or business scenarios presented in the following topics.

### Vehicles in Siebel Automotive

In Siebel Automotive, 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.

### Scenario for Working with Vehicles

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 vehicle identification number (VIN) and drills down on the VIN to access the Vehicles screen.

**NOTE:** 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 Process Workflow

Figure 23 illustrates the end-user workflow for working with vehicles.

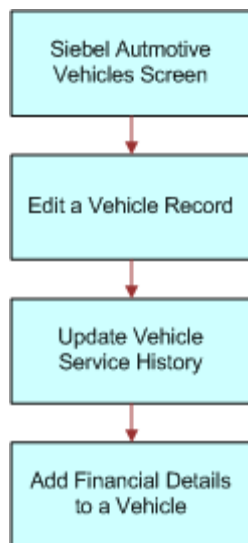


Figure 23. Vehicles Workflow

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

## Entering Vehicle Records

Most vehicle records are entered into Siebel Automotive through EIM rather than through manual entry. End users follow this procedure to manually enter a vehicle record. It includes a table that lists and describes selected fields that are specific to vehicles.

### *To view, edit, create, and delete a vehicle*

- 1 Navigate to the Administration - Vehicle screen.
- 2 In the Vehicles list, add, edit, or delete a record.

# Process of Managing Vehicle Records

To manage vehicle records, end users perform the following tasks:

- ["Editing a Vehicle Record" on page 115](#)
- ["Changing Vehicle Status" on page 115](#)
- ["Deleting a Vehicle" on page 116](#)
- ["Updating Vehicle Service History" on page 116](#)
- ["Managing Vehicle Financial Details" on page 117](#)

## Editing a Vehicle Record

Use this procedure to make changes to vehicle records. End users cannot add or delete vehicles.

This task is a step in ["Process of Managing Vehicle Records" on page 115](#).

### *To edit a vehicle record*

- 1 Navigate to the Vehicles screen.
- 2 Click the VIN link for a selected vehicle record.
- 3 Make changes to the record as needed.

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

**NOTE:** For fleet information, click a VIN link, and then click More Info. In the Fleet Information field, the Fleet check box is a flag set to identify whether a vehicle belongs to Fleet or not, the Company field is the fleet company to which the vehicle belongs, and Fleet Type is the type of fleet the vehicle belongs to, such as, rental, ambulance, and so on.

### Related Topics

- ["Changing Vehicle Status" on page 115](#)
- ["Deleting a Vehicle" on page 116](#)
- ["Updating Vehicle Service History" on page 116](#)
- ["Managing Vehicle Financial Details" on page 117](#)

## Changing Vehicle Status

Use this procedure to change the status of a vehicle from Allocated to Available using the Vehicle Administration screen. 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.

This task is a step in ["Process of Managing Vehicle Records" on page 115](#).

For more information about vehicle allocation, see ["Allocating Vehicles to a Quote" on page 135](#).

### *To change the status of a vehicle*

- 1 Navigate to the Administration - Vehicle screen.
- 2 Drill down on the VIN field link for a selected vehicle record.
- 3 Click the More Info view tab.
- 4 In the Inventory Information area, select the new status from the Status field drop-down list.

#### Related Topics

- ["Editing a Vehicle Record" on page 115](#)
- ["Deleting a Vehicle" on page 116](#)
- ["Updating Vehicle Service History" on page 116](#)
- ["Managing Vehicle Financial Details" on page 117](#)

## Deleting a Vehicle

Use this procedure to delete a vehicle.

This task is a step in ["Process of Managing Vehicle Records" on page 115](#).

### *To delete a vehicle*

- 1 Navigate to the Administration - Vehicle screen.
- 2 Select a vehicle record, and click Delete.

#### Related Topics

- ["Editing a Vehicle Record" on page 115](#)
- ["Changing Vehicle Status" on page 115](#)
- ["Updating Vehicle Service History" on page 116](#)
- ["Managing Vehicle Financial Details" on page 117](#)

## Updating Vehicle Service History

Use this procedure to view, edit, create, and delete service history for a vehicle.

This task is a step in ["Process of Managing Vehicle Records" on page 115](#).

### *To view, edit, create, and delete vehicle service history*

- 1 Navigate to the Administration - Vehicle screen.
- 2 Drill down on a VIN.

- 3 Click Service History.
- 4 In the Service History list, add, edit, or delete records.

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

#### Related Topics

- ["Editing a Vehicle Record" on page 115](#)
- ["Changing Vehicle Status" on page 115](#)
- ["Deleting a Vehicle" on page 116](#)
- ["Managing Vehicle Financial Details" on page 117](#)

## Managing Vehicle Financial Details

Use this procedure to view, edit, create, and delete details about a vehicle's lease, loan, or cash payment options.

This task is a step in ["Process of Managing Vehicle Records" on page 115](#).

#### *To view, edit, create, and delete financial details for a vehicle*

- 1 Navigate to the Administration - Vehicle screen.
- 2 Drill down on the VIN field link for a selected vehicle record.
- 3 Click the Financial Detail view tab.
- 4 In the Financial Detail list, add, edit, or delete records.

**NOTE:** Depending on the Financing Type, the Financial Details form displays 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.

#### Related Topics

- ["Editing a Vehicle Record" on page 115](#)
- ["Changing Vehicle Status" on page 115](#)
- ["Deleting a Vehicle" on page 116](#)
- ["Updating Vehicle Service History" on page 116](#)



# 10 Managing Products

This chapter provides information about standard Siebel Automotive functionality for product management. It consists of the following topics:

- [“Types of Products” on page 119](#)
- [“About the List of Valid Vehicle Options” on page 119](#)
- [“Scenario for Working with Automotive Products” on page 120](#)
- [“Products Process Workflow” on page 121](#)
- [“Process of Managing Products” on page 121](#)
- [“Managing a Product’s Information” on page 121](#)
- [“Associating Valid Options with a Product” on page 122](#)
- [“Adding Product Features and Specifications” on page 123](#)

**NOTE:** Your company’s application configuration and business processes may differ from the procedures or business scenarios presented in the following topics.

## Types of Products

There are two main types of products in Siebel Automotive:

- Products whose Type is Vehicle and Type is Option.
- Product whose Type is Option can be associated with a product whose Type is 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.

## About the List of Valid Vehicle Options

A list of valid options displays 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 Automotive, 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 that is described in *Siebel Product Administration Guide* before performing procedures in this chapter.

## Scenario for Working with Automotive Products

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 Process Workflow

Figure 24 illustrates the administrator workflow for working with products.

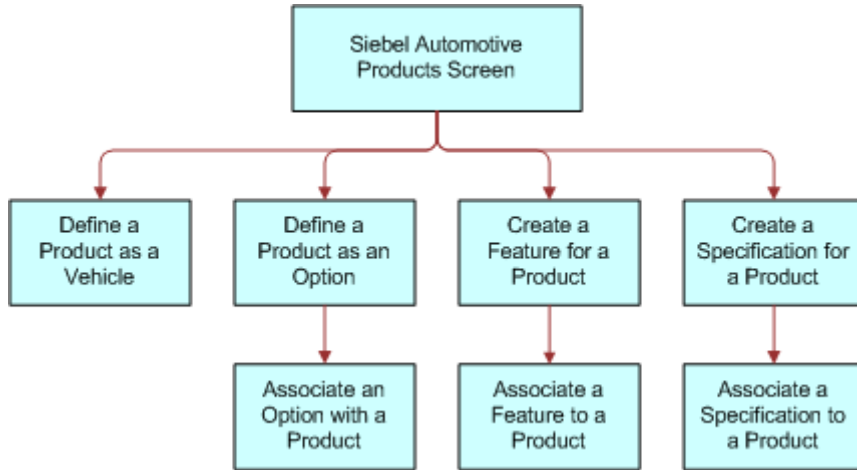


Figure 24. Products Workflow

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

## Process of Managing Products

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.

To manage products using Siebel Automotive, perform the following tasks:

- “Managing a Product’s Information” on page 121.
- “Associating Valid Options with a Product” on page 122.
- “Adding Product Features and Specifications” on page 123.

## Managing a Product’s Information

Use this procedure to view, edit, create, and delete a product. You can define product information about options, features, and specifications.

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

This task is a step in “Process of Managing Products” on page 121.

*To view, edit, create, and delete a product as a vehicle*

- 1 Navigate to the Administration - Product screen.
- 2 In the Products form, add, edit, or delete records.

**Related Topics**

- [“Associating Valid Options with a Product” on page 122](#)
- [“Adding Product Features and Specifications” on page 123](#)

## 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.

This task is a step in [“Process of Managing Products” on page 121](#).

**Related Topics**

- [“Managing a Product's Information” on page 121](#)
- [“Adding Product Features and Specifications” on page 123](#)

### Defining a Product as an Option

Use this procedure to define a product as an option.

This task is a step in [“Associating Valid Options with a Product” on page 122](#).

*To define a product as an option*

- 1 Navigate to the Administration - Product screen.
- 2 Create a new record.
- 3 In the Type field, select Option.
- 4 If the newly defined option is to be associated with one or more vehicles, click Create Asset.
- 5 Complete the fields as necessary.

**Related Topic**

- [“Associating an Option with a Product With Type of Vehicle” on page 122](#)

### Associating an Option with a Product With Type of Vehicle

Use this procedure to associate an option with a product with the type of vehicle.

This task is a step in [“Associating Valid Options with a Product” on page 122](#).

***To associate an option with a product with the Type of Vehicle***

- 1 Navigate to the Administration - Product screen, then the Valid Options view.
- 2 In the Valid Options list, add, edit, or delete records.

**Related Topic**

- [“Associating an Option with a Product With Type of Vehicle” on page 122](#)

## Adding Product Features and Specifications

Use this procedure to add features and specifications that are related to an automotive product. This information is for the supply sales and service personnel.

This task is a step in [“Process of Managing Products” on page 121](#).

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

### Working with Product Features

Use this procedure to view, edit, create, and delete a feature for a product.

This task is a step in [“Adding Product Features and Specifications” on page 123](#).

***To view, edit, create, and delete a feature for a product***

- 1 Navigate to the Administration - Product screen, then the Product Features view.
- 2 In the Product Features list, add, edit, or delete records.

### Associating a Feature with a Product

Use this procedure to associate a feature with a product.

This task is a step in [“Adding Product Features and Specifications” on page 123](#).

***To associate a feature with a product***

- 1 Navigate to the Administration - Product screen, then the Products view.
- 2 Drill down on the Name field link for a selected product record.
- 3 In the Administration - Product link bar, click the Features link.
- 4 In the Features list, create a new record.
- 5 In the Category field, select the category for the feature you just created in [“Working with Product Features” on page 123](#).
- 6 Complete the fields as necessary.

## Working with Product Specifications

Use this procedure to view, edit, create, and delete a specification for a product.

This task is a step in [“Adding Product Features and Specifications” on page 123](#).

### *To view, edit, create, and delete a specification for a product*

- 1 Navigate to the Administration - Product screen, then the Specifications view.
- 2 In the Specifications list, add, edit, or delete records.

## Associating a Specification with a Product

Use this procedure to associate a specification with a product.

This task is a step in [“Adding Product Features and Specifications” on page 123](#).

### *To associate a specification with a product*

- 1 Navigate to the Administration - Product screen, then the Products view.
- 2 Select the product record that you want to associate a specification with.
- 3 In the Administration - Product link bar, click the Specifications link.
- 4 In the Specifications list, create a new record.
- 5 In the Category field, select the category for the specification you just created in [“Working with Product Specifications” on page 124](#).
- 6 Complete the fields as necessary.

# 11 Associating Vehicles with Opportunities

This chapter provides information about standard Siebel Automotive functionality for opportunity management. It consists of the following topics:

- [“Opportunity Defined” on page 125](#)
- [“Associating a Vehicle with an Opportunity” on page 125](#)

**NOTE:** Your company's application configuration and business processes may differ from the procedures or business scenarios presented in the following topics.

## Opportunity Defined

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

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

## Associating a Vehicle with an Opportunity

Use this procedure to 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, then the Opportunities List view.
- 2 Drill down on the Opportunity Name field link for a selected opportunity record.
- 3 Click the Revenues view tab.
- 4 In the Revenues link bar, click the List link.
- 5 In the List, add, edit, or delete records.

**6** Complete the fields as necessary.

Some fields are described in the following table.

Field	Description
Revenue	Amount expected to make from the opportunity.
Probability %	Probability of the opportunity.

# 12 Setting Up Households

This chapter provides information about standard Siebel Automotive functionality for household management. It consists of the following topics:

- ["Households Defined" on page 127](#)
- ["Scenario for Working with Households" on page 127](#)
- ["Process of Working with Households" on page 128](#)
- ["Viewing Vehicles Associated with a Household" on page 128](#)
- ["Associating Team Members with a Household" on page 128](#)

**NOTE:** Your company's application configuration and business processes may differ from the procedures or business scenarios presented in the following topics.

## Households Defined

Households are entities comprising individual consumers, or contacts, who 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 Automotive; 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 Automotive allows marketing and service managers to see vehicles, opportunities, and service requests associated with household members. Managers can also use Oracle Business Intelligence to segment household data to target households that meet various demographic and purchasing trend criteria.

## Scenario for Working with Households

This topic 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 stockbroker 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 because they are going to different colleges, the household needs to add a vehicle. The sales representative enters the information into Siebel Automotive and sends product literature with a letter inviting the customer and his family to come test drive a new vehicle.

## Process of Working with Households

End users, primarily sales and service representatives, work with households in Siebel Automotive. How an end user proceeds depends on whether they are working with an existing household or setting up a new one. If the household exists, the end user can 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 *Siebel Applications Administration Guide*. Additionally, application administrators may perform end user procedures described in this chapter.

To work with households, end users perform the following tasks:

- [“Viewing Vehicles Associated with a Household” on page 128](#)
- [“Associating Team Members with a Household” on page 128](#)

## Viewing Vehicles Associated with a Household

Use this procedure to view vehicles associated with a contact, which may belong to a household. Vehicle information can provide household trends about make, model, and other vehicle features within a household.

This task is a step in [“Process of Working with Households” on page 128](#).

### *To view vehicles associated with a household*

- 1 Navigate to the Households screen, then the List view.
- 2 Drill down on the Name field link for a selected household record.
- 3 Click the Vehicles view tab.

### Related Topic

- [“Associating Team Members with a Household” on page 128](#)

## Associating Team Members with a Household

Use this procedure to associate sales and service team members with a household in order to add and qualify opportunities and perform follow-up sales, marketing, and service procedures.

**NOTE:** The first team member added to a household is marked as the primary access. Only one team member for each household can have primary access. Click in the Primary field of the team member who has primary access to change the primary access for a household.

This task is a step in [“Process of Working with Households” on page 128](#).



*To associate team members with a household*

- 1 Navigate to the Households screen, then the List view.
- 2 Select a household record.
- 3 In the Team field, add one or more team members.

**Related Topic**

- [“Viewing Vehicles Associated with a Household” on page 128](#)



# 13 Managing Quotes

This chapter provides information about quote management Siebel Automotive functionality that application administrators and end users can use to manage quotes in their daily job roles. It consists of the following topics:

- ["About Quotes" on page 131](#)
- ["Scenario for Working with Automotive Quotes" on page 131](#)
- ["Quotes Process Workflow" on page 132](#)
- ["Process of Creating Quotes" on page 132](#)
- ["Setting the Price List for Quotes" on page 133](#)
- ["Creating Quotes" on page 133](#)
- ["Copying or Revising a Quote" on page 133](#)
- ["Allocating Vehicles to a Quote" on page 135](#)

**NOTE:** Your company's application configuration and business processes may differ from the procedures or business scenarios presented in the following topics.

## About Quotes

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.

## Scenario for Working with Automotive Quotes

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 Process Workflow

Figure 25 illustrates the end-user workflow for working with quotes.

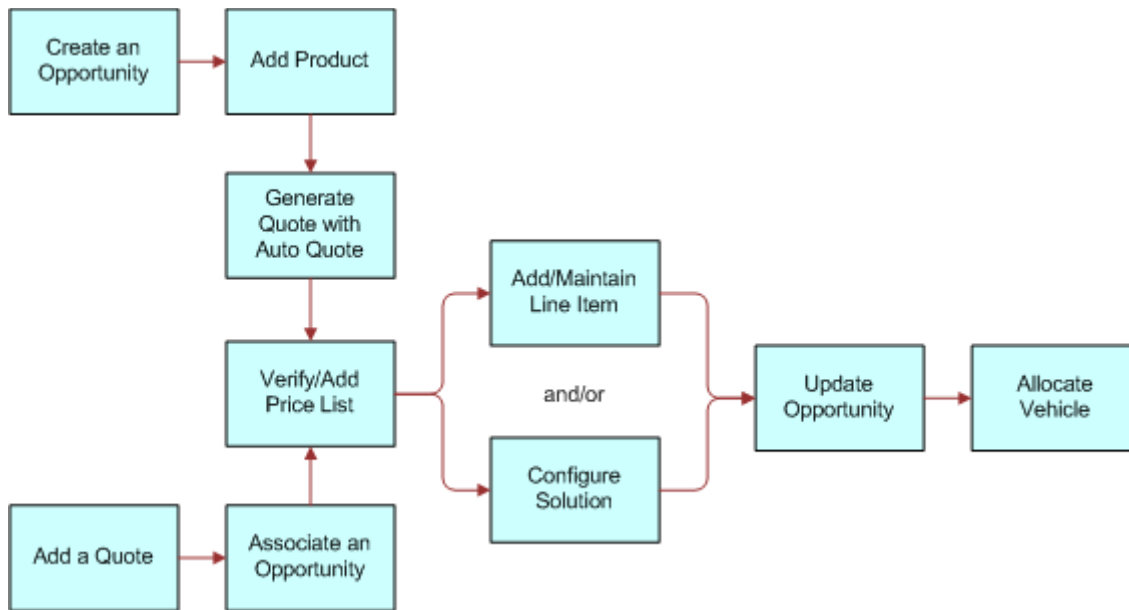


Figure 25. Quotes Workflow

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

## Process of Creating Quotes

To create quotes, end users perform the following tasks:

- “Setting the Price List for Quotes” on page 133
- “Creating Quotes” on page 133
- “Copying or Revising a Quote” on page 133
- “Allocating Vehicles to a Quote” on page 135

## Setting the Price List for Quotes

Before creating a quote, use this procedure to set the default price list that you want to use in the quote process.

This task is a step in [“Process of Creating Quotes”](#) on page 132.

### *To set a default price list*

- 1 Navigate to the User Profile Preferences screen, then the Price List & Sales Methodology view.
- 2 In the Price List field, select the price list that you want to use as a default for the Quotes screen.
- 3 If needed, select a sales methodology from the Sales Methodology drop-down list.

### Related Topics

- [“Creating Quotes”](#) on page 133
- [“Copying or Revising a Quote”](#) on page 133
- [“Allocating Vehicles to a Quote”](#) on page 135

## Creating Quotes

Use this procedure to create quotes.

This task is a step in [“Process of Creating Quotes”](#) on page 132.

### *To create a new quote*

- 1 Navigate to the Quotes screen, then the List view.
- 2 From the visibility filter, select My Quotes.
- 3 In the Quotes list, create a new record.
- 4 Complete the fields as necessary.

### Related Topics

- [“Setting the Price List for Quotes”](#) on page 133
- [“Copying or Revising a Quote”](#) on page 133
- [“Allocating Vehicles to a Quote”](#) on page 135

## Copying or Revising a Quote

There are two ways to create a quote based on an existing quote:

- [“Using Copy Record to Copy or Revise a Quote”](#) on page 134

- [“Using Revise to Copy or Revise a Quote” on page 135](#)

This task is a step in [“Process of Creating Quotes” on page 132](#).

**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.

### Related Topics

- [“Setting the Price List for Quotes” on page 133](#)
- [“Creating Quotes” on page 133](#)
- [“Allocating Vehicles to a Quote” on page 135](#)

## Using Copy Record to Copy or Revise a Quote

This procedure uses the Copy Record command to copy or revise a quote.

### *To use Copy Record to copy or revise a quote*

- 1 Navigate to the Quotes screen, then the List view.
- 2 Select a quote record that you want to copy or revise.
- 3 Click Menu, and select Copy Record.

The following action occurs:

- A new quote number is created for the 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.

### Related Topics

- [“Setting the Price List for Quotes” on page 133](#)
- [“Creating Quotes” on page 133](#)
- [“Copying or Revising a Quote” on page 133](#)
- [“Allocating Vehicles to a Quote” on page 135](#)

## Using Revise to Copy or Revise a Quote

This procedure uses the Revise button to copy or revise a quote.

**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.

### *To use Revise to copy or revise a quote*

- 1 Navigate to the Quotes screen, then the List view.
- 2 Select a quote record that you want to copy or revise.
- 3 Click Revise.

The following action occurs:

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

### Related Topics

- ["Setting the Price List for Quotes" on page 133](#)
- ["Creating Quotes" on page 133](#)
- ["Copying or Revising a Quote" on page 133](#)
- ["Allocating Vehicles to a Quote" on page 135](#)

## Allocating Vehicles to a Quote

Use this procedure to allocate a vehicle from dealer inventory in order to reserve the vehicle for a specific customer opportunity.

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

This task is a step in ["Process of Creating Quotes" on page 132](#).

### *To allocate vehicles to a quote*

- 1 Navigate to the Quotes screen, then the List view.
- 2 Drill down on the Quote Number field link for a selected quote record.

- 3 Click the Vehicles view tab.
- 4 Select the product record upon which the vehicle was based.
- 5 Scroll down to the Vehicles list, and create a new record.
- 6 Click the select button on the VIN Number 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 click ok.

### Related Topics

- [“Creating Quotes” on page 133](#)
- [“Copying or Revising a Quote” on page 133](#)



# 14 Managing Service Requests

This chapter provides information about standard Siebel Automotive functionality for service request management that application administrators and end users can use to manage service requests in their daily job roles. It consists of the following topics:

- [“Service Requests Defined” on page 137](#)
- [“About Service Request Channels” on page 137](#)
- [“Scenario for Working with Automotive Service Requests” on page 138](#)
- [“Process of Working with Service Requests” on page 138](#)
- [“Automotive Captive Finance Service Request Types” on page 138](#)
- [“Creating a Service Request” on page 138](#)
- [“Assigning the Service Request” on page 139](#)
- [“Providing Details of Services to Be Performed” on page 141](#)
- [“Researching and Resolving a Service Request” on page 141](#)

**NOTE:** Your company’s application configuration and business processes may differ from the procedures or business scenarios presented in the following topics.

## Service Requests Defined

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.

## About Service Request Channels

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
- Customers walking into a service center

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

## Scenario for Working with Automotive Service Requests

A customer calls a call center to report a vehicle that does 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.

## Process of Working with Service Requests

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.

To work with service requests, end users perform the following tasks.

- ["Creating a Service Request" on page 138](#)
- ["Assigning the Service Request" on page 139](#)
- ["Providing Details of Services to Be Performed" on page 141](#)
- ["Researching and Resolving a Service Request" on page 141](#)

## Automotive Captive Finance Service Request Types

There are many different account service request types available for automotive captive finance companies. For details, see the Account Services topic on service requests in *Siebel Finance Guide*.

## Creating a Service Request

Use this procedure to create a service request.

This task is a step in [“Process of Working with Service Requests”](#) on page 138.

**NOTE:** There are many different account service request types available for automotive captive finance companies. For details, see the Account Services topic on service requests in *Siebel Finance Guide*.

### ***To create a service request***

- 1 Navigate to the Service Requests screen, then the Service Requests List view.
- 2 From the visibility filter, select My Service Requests.
- 3 In the Service Request form, create a new record.
  - a In the Type field, select Asset Finance.
  - b In the Area field, select the type of service request.
- 4 Complete the fields as necessary.

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

## Assigning the Service Request

This topic discusses the three ways to assign a service request and the circumstances under which each would be appropriate.

This task is a step in [“Process of Working with Service Requests”](#) on page 138.

### **Assigning the Service Request Manually**

Use this procedure to assign a service request 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.

#### ***To assign a service request manually***

- 1 Navigate to the Service Requests screen, then the Service Requests List view.
- 2 From the visibility filter, select All Service Requests.
- 3 Select a SR Number record.
- 4 In the Sub Status field, select Assigned.
- 5 In the Owner field, select the person to whom you want to assign the request.

### **Using Assignment Manager to Assign Service Requests**

This method of assigning service requests 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 using Assignment Manager**

- 1 Navigate to the Service Requests screen, then the Service Requests List view.
- 2 From the visibility filter, select All Service Requests.
- 3 Select a SR Number record.
- 4 In the lower form applet, click Menu, and select Assign.

**NOTE:** The system 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.

**Assigning Service Requests Using Dealer Assignment**

Use this procedure to 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 to assign service requests**

- 1 Navigate to the Service Requests screen, then the Service Requests List view.
- 2 Drill down on the SR Number field link for a selected service request record.
- 3 Click the Dealer Assignment view tab and perform actions appropriate for your situation, as described in the following table.

To...	Then...
Assign the service request	Select one of the following options from the Automatically Assign Service Request to a Dealer drop-down list: <ul style="list-style-type: none"> <li>■ Preferred Service Dealer</li> <li>■ Selling Dealer</li> </ul> <p><b>NOTE:</b> For a service request to be assigned to either of the two values, they should have been set for the vehicle.</p> For more information about setting values for a vehicle, see <a href="#">"Editing a Vehicle Record" on page 115.</a>
Manually pick the dealer to assign this service request	Select the dealer from the Pick a Dealer field.
Set an appointment	Create a new record in the Appointment Time form and enter the time and date of the appointment.

## Providing Details of Services to Be Performed

Use this procedure to view, edit, create, and delete record details of services to be performed for this service request.

This task is a step in [“Process of Working with Service Requests”](#) on page 138.

### *To provide details of services to be performed*

- 1 Navigate to the Service Requests screen, then the Service Requests List view.
- 2 Drill down on the SR Number field link for a selected service request record.
- 3 Click the Services To Be Performed view tab.
- 4 In the Services To Be Performed list, add, edit, or delete records.

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

## Researching and Resolving a Service Request

Use this procedure 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.

This task is a step in [“Process of Working with Service Requests”](#) on page 138.

### *To research and resolve a service request*

- 1 Navigate to the Service Requests screen, then the Service Requests List view.
- 2 Drill down on the SR Number field link for a selected service request record that you want to resolve.

- 3 To view related service requests, click the Related SRs view tab to see if the problem has been solved before.

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

If...	Then...
You find a relevant service request	Use Attach to attach it to the current service request.
A solution is still needed	Perform a full knowledge search and attach any relevant solutions to the current service request.

- 4 From the Status field 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.

# 15 Tracking Service History

This chapter describes how to use Siebel Automotive's Service History screen to view information about the types of services and repairs done on a specific vehicle. It consists of the following topics:

- ["Overview of Tracking Services and Repairs" on page 143](#)
- ["Scenario for Tracking Automotive Service History Scenario" on page 143](#)
- ["Process of Tracking Service History" on page 144](#)
- ["Creating a New Service History Record" on page 144](#)
- ["Managing Services Performed" on page 144](#)
- ["Managing Manufacturer and Customer Pay" on page 145](#)
- ["Working with Service History" on page 145](#)

## Overview of Tracking Services and Repairs

Customers, manufacturers, and dealers can keep track of all services and repairs performed on vehicles.

## Scenario for Tracking Automotive Service History Scenario

This topic 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 Automotive 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 is able to view the service history.

A customer buys a vehicle from a dealer 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 the dealer Web site to track his service and repair history, the manufacturer is able to market other products to him.

## Process of Tracking Service History

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.

To track service history, end users perform the following tasks:

- [“Creating a New Service History Record” on page 144](#)
- [“Managing Services Performed” on page 144](#)
- [“Managing Manufacturer and Customer Pay” on page 145](#)
- [“Working with Service History” on page 145](#)

## Creating a New Service History Record

Use this procedure to add a new service history record.

This task is a step in [“Process of Tracking Service History” on page 144](#).

### *To create a service history record*

- 1 Navigate to the Service History screen.
- 2 In the Service History list, create a new record.
- 3 Complete the fields as necessary.

### **Related Topics**

- [“Managing Services Performed” on page 144](#)
- [“Managing Manufacturer and Customer Pay” on page 145](#)
- [“Working with Service History” on page 145](#)

## Managing Services Performed

Use this procedure to view, edit, create, and delete services performed.

This task is a step in [“Process of Tracking Service History” on page 144](#).

### *To view, edit, create, and delete services performed*

- 1 Navigate to the Service History screen.
- 2 Drill down on the SR Number field link for a selected service request record.
- 3 Click the Services Performed view tab.



- 4 In the Services Performed list, add, edit, or delete records.

**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.

#### Related Topics

- [“Creating a New Service History Record” on page 144](#)
- [“Managing Manufacturer and Customer Pay” on page 145](#)
- [“Working with Service History” on page 145](#)

## Managing Manufacturer and Customer Pay

Use this procedure to show manufacturer and customer pay records.

This task is a step in [“Process of Tracking Service History” on page 144](#).

#### *To manage manufacturer and customer pay*

- 1 Navigate to the Service History screen.
- 2 Drill down on the SR Number field link for a selected service request record.
- 3 Click the Labor Operation Codes view tab.

In	You can
The Manufacturing Pay list	Add, edit, or delete records.
The Customer Pay list	Add, edit, or delete records.

#### Related Topics

- [“Creating a New Service History Record” on page 144](#)
- [“Managing Services Performed” on page 144](#)
- [“Working with Service History” on page 145](#)

## Working with Service History

Use this procedures to view, edit, create, and delete service history for a vehicle or for a contact.

This task is a step in [“Process of Tracking Service History” on page 144](#).

***To view, edit, create, and delete the service history for a particular vehicle***

- 1 Navigate to the Vehicles screen.
- 2 Drill down on the VIN field link for a selected vehicle record.
- 3 Click the Service History view tab.
- 4 In the Service History list, add, edit, or delete records.

***To view, edit, create, and delete the service history for a particular contact***

- 1 Navigate to the Contacts screen, then the Contacts List view.
- 2 Drill down on the Contact field link for a selected contact record.
- 3 Click the Service History view tab.
- 4 In the Service History list, add, edit, or delete records.

**Related Topics**

- [“Creating a New Service History Record” on page 144](#)
- [“Managing Services Performed” on page 144](#)
- [“Managing Manufacturer and Customer Pay” on page 145](#)

# 16 Tracking Sales History

This chapter provides information about standard Siebel Automotive functionality for tracking sales history. It consists of the following topics:

- [“About Tracking Sales History” on page 147](#)
- [“Scenario for Tracking Automotive Sales History” on page 147](#)
- [“Process of Tracking Sales History” on page 148](#)
- [“Creating a New Sales History Record” on page 148](#)
- [“Viewing Sales History” on page 148](#)

**NOTE:** Your company's application configuration and business processes may differ from the procedures or business scenarios presented in the following topics.

## About Tracking Sales History

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 Automotive 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.

## Scenario for Tracking Automotive Sales History

This topic 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 Automotive allows you enter or import a vehicle's sales history. Usually, dealers maintain their sales history in a Dealer Management System (DMS). After making a sale, the dealer reports it to the manufacturer, using an interface provided by the manufacturer. The OEM can then import it into Siebel Automotive using Siebel'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 is able to view the sales history.

## Process of Tracking Sales History

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.

To track sales history, end users perform the following tasks:

- ["Creating a New Sales History Record" on page 148](#)
- ["Viewing Sales History" on page 148](#)

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

## Creating a New Sales History Record

A dealer can use this procedure to add a new sales history record.

**NOTE:** Most sales history records are added to Siebel Automotive using Enterprise Integration Manager (EIM).

This task is a step in ["Process of Tracking Sales History" on page 148](#).

### *To create a sales history record*

- 1 Navigate to the Sales History screen.
- 2 In the Sales History list, create a new record.

### Related Topic

- ["Viewing Sales History" on page 148](#)

## Viewing Sales History

Use these procedures to view sales history for a vehicle or for a contact. The Sales History screen contains a list of all sales transactions.

This task is a step in ["Process of Tracking Sales History" on page 148](#).

***To view the sales history for a particular vehicle***

- 1 Navigate to the Vehicles screen.
- 2 Drill down on the VIN field link for a selected vehicle record.
- 3 Click the Sales History view tab.

***To view the sales history for a particular contact***

- 1 Navigate to the Contacts screen, then the Contacts List view.
- 2 Drill down on the Last Name field link for a selected contact record.
- 3 Click the Sales History view tab.

**Related Topic**

- [“Creating a New Sales History Record” on page 148](#)



# 17 Setting Up Preventive Maintenance

This chapter provides information about standard Siebel Automotive functionality for preventive maintenance that is relevant to both application administrators and end users, including service and support center representatives. It consists of the following topics:

- [“Scenarios for Working with Automotive Preventive Maintenance” on page 151](#)
- [“Process of Setting Up Preventive Maintenance” on page 152](#)
- [“Setting a Trigger for a PM Plan” on page 152](#)
- [“Associating a PM Plan with a Product” on page 153](#)
- [“Associating a PM Plan with Vehicles” on page 153](#)
- [“Process of Tracking Preventive Maintenance” on page 154](#)
- [“Viewing PM History for a Vehicle” on page 154](#)
- [“Working with PM Plans for a Vehicle” on page 155](#)

**NOTE:** Your company's application configuration and business processes may differ from the procedures or business scenarios presented in the following topics.

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

## Scenarios for Working with Automotive Preventive Maintenance

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

This topic 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 Maintenance Scenario” on page 151](#)
- [“Triggered Maintenance Scenario” on page 152](#)

### Periodic Maintenance Scenario

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

A dealership sold a vehicle to a customer a few months ago. Based on the common driving habits, the dealership has set up calculations to determine the average mileage the customer drives during a time period. Once the time period elapses, the Siebel Automotive 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 Scenario

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 Automotive can generate a PM action to notify the customer to take the vehicle to the dealer for service.

## Process of Setting Up Preventive Maintenance

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.

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

To set up preventive maintenance, perform the following tasks:

- [“Setting a Trigger for a PM Plan” on page 152](#)
- [“Associating a PM Plan with a Product” on page 153](#)
- [“Associating a PM Plan with Vehicles” on page 153](#)

**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 Automotive. This procedure is based on a mileage trigger for maintenance.

This task is a step in [“Process of Setting Up Preventive Maintenance” on page 152](#).

### *To set up a trigger for a PM plan*

- 1 Navigate to the Preventive Maintenance screen, then the Preventive Maintenance List view.
- 2 Select a PM plan record.
- 3 Click the Triggers view tab, and take the following action:



- **Time Interval list.** Add, Edit, or Delete records.
- **Usage list.** Add, Edit, or Delete records.
- **Month-Day list.** Add, Edit, or Delete records.
- **Threshold list.** Add, Edit, or Delete records.
- **Event list.** Add, Edit, or Delete records.

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

#### Related Topics

- [“Associating a PM Plan with a Product” on page 153](#)
- [“Associating a PM Plan with Vehicles” on page 153](#)

## Associating a PM Plan with a Product

After you define the PM plan triggers, use this procedure to associate it with a product you added. See [“Managing Products” on page 119](#) for more information on using Products.

This task is a step in [“Process of Setting Up Preventive Maintenance” on page 152](#).

#### *To associate a PM plan with a product*

- 1 Navigate to the Preventive Maintenance screen, then the Preventive Maintenance List view.
- 2 Select a PM plan record.
- 3 Click the Products view tab.
- 4 In the Products list, add, edit, or delete records.

#### Related Topics

- [“Setting a Trigger for a PM Plan” on page 152](#)
- [“Associating a PM Plan with Vehicles” on page 153](#)

## Associating a PM Plan with Vehicles

When you associate the PM plan with a product, use this procedure to associate it to a specific vehicle or vehicles. After a preventive maintenance (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.

This task is a step in [“Process of Setting Up Preventive Maintenance” on page 152](#).

### *To associate a PM plan with a vehicle or vehicles*

- 1 Navigate to the Preventive Maintenance screen, then the Preventive Maintenance List view.
- 2 Select a PM plan record.
- 3 Click the Products view tab.
- 4 Select a product record.
- 5 Scroll down to the Assets list, add, edit, or delete records.

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

### Related Topics

- [“Setting a Trigger for a PM Plan” on page 152](#)
- [“Associating a PM Plan with a Product” on page 153](#)

## Process of Tracking Preventive Maintenance

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.

To use Siebel Automotive for preventive maintenance tracking, end users perform the following tasks.

- [“Viewing PM History for a Vehicle” on page 154](#)
- [“Working with PM Plans for a Vehicle” on page 155](#)

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

## Viewing PM History for a Vehicle

Use this procedure to view the preventive maintenance actions for a vehicle through the Preventive Maintenance tab of the Vehicles screen.

This task is a step in [“Process of Tracking Preventive Maintenance” on page 154](#).

### *To view PM history for a vehicle*

- 1 Navigate to the Vehicles screen.
- 2 Drill down on the VIN field link for a selected vehicle record.
- 3 Click the Preventive Maintenance view tab.
- 4 In the Preventive Maintenance link bar, click the History link, if it is not already selected.

- 5 When a PM action is completed, enter data in the Date Completed and Completed Reading fields.  
The Completed Reading field is the reading for that particular preventive maintenance action. This value could be mileage, or oil level, and so on.
- 6 To view more details about the preventive maintenance plan, drill down on the link in the Plan Item Name field.

**Related Topic**

- [“Working with PM Plans for a Vehicle” on page 155](#)

## Working with PM Plans for a Vehicle

Use this procedure to view, edit, create, and delete preventive maintenance plans for a vehicle through the Preventive Maintenance tab of the Vehicles screen.

This task is a step in [“Process of Tracking Preventive Maintenance” on page 154](#).

***To view, edit, create, and delete PM plans for a vehicle***

- 1 Navigate to the Vehicles screen.
- 2 Drill down on the VIN field link for a selected vehicle record.
- 3 Click the Preventive Maintenance view tab.
- 4 In the Preventive Maintenance link bar, click the Plan link, if it is not already selected.
- 5 In the Plan list, add, edit, or delete records.

**Related Topic**

- [“Viewing PM History for a Vehicle” on page 154](#)



# 18 Setting Up and Using Siebel Automotive Tools

This chapter covers how to set up and use Oracle's Siebel Automotive tools for end users—Dealer Locator, Vehicle Inventory Search, and Financial Calculator. It consists of the following topics:

- ["Process of Locating a Dealer" on page 157](#)
- ["Setting Up the Dealer Locator \(Administrators\)" on page 157](#)
- ["Locating a Dealer \(End Users\)" on page 158](#)
- ["Process of Searching for a Vehicle" on page 158](#)
- ["Setting Up Vehicle Search" on page 158](#)
- ["Searching for a Vehicle" on page 159](#)
- ["Calculating Loans and Leases" on page 159](#)

## Process of Locating a Dealer

To locate a dealer, perform the following tasks:

- ["Setting Up the Dealer Locator \(Administrators\)" on page 157](#)
- ["Locating a Dealer \(End Users\)" on page 158](#)

## Setting Up the Dealer Locator (Administrators)

Administrators use the following procedure to control the settings for the Dealer Locator, which is used to find dealers near various end users. Dealer Locator needs to be set up before inventory search can work.

This task is a step in ["Process of Locating a Dealer" on page 157](#).

**CAUTION:** 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 set up a dealer location*

- 1 Navigate to the Administration - Application screen, then the Dealer Location Administration view.
- 2 In the Dealer Locations list, add, edit, or delete records.
- 3 Complete the fields as necessary.

## Locating a Dealer (End Users)

End users use this procedure to locate dealers by the contact information for the dealer.

This task is a step in [“Process of Locating a Dealer” on page 157](#).

### *To locate a dealer*

- Navigate to the Automotive Tools screen, then the Dealer Locator view.

**TIP:** You can also use the \* wildcard character to enter partial City names and ZIP Codes to increase the number of dealers that the locator finds. For example, typing Fern\* in the City field matches all cities with names that begin with Fern. Typing 9461\* in the ZIP Code field matches all ZIP Codes that begin with 9461.

## Process of Searching for a Vehicle

To search for a vehicle, end users perform the following tasks:

- [“Setting Up Vehicle Search” on page 158](#)
- [“Searching for a Vehicle” on page 159](#)

## Setting Up Vehicle Search

Use this procedure to set up a vehicle in order for it to display in the inventory. As long as the Owned By, Account Name, and Status fields have been completed, the vehicle displays in the inventory. The vehicle can then be found using the Inventory Search feature.

This task is a step in [“Process of Searching for a Vehicle” on page 158](#).

**NOTE:** The Dealer Locator must be set up before Inventory Search can function.

### *To set up vehicle search*

- 1 Navigate to the Administration - Vehicle screen.
- 2 Select a VIN record.
- 3 In the Vehicles form applet, complete the following fields, along with any other fields as necessary.

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

## Searching for a Vehicle

Use this procedure to search for a vehicle by entering the city and state or ZIP Code.

This task is a step in ["Process of Searching for a Vehicle"](#) on page 158.

### *To search for a vehicle in inventory*

- 1 Navigate to the Automotive Tools screen, then the Vehicle Inventory Search view.
- 2 Enter city and state or ZIP Code.
- 3 Click Search.

A list of vehicles matching the search criteria appears.

**NOTE:** Click **Reset** to start a new search.

## Calculating Loans and Leases

A loan and a lease can be calculated simultaneously from the same information. Use this procedure 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 a lease or a loan. After 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, then the Financial Calculator view.
- 2 Enter values in the fields, and click Calculate.





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