Siebel Automotive Guide

Version 7.7

March 2004

PRODUCT MODULES AND OPTIONS. This guide contains descriptions of modules that are optional and for which you may not have purchased a license. Siebel's Sample Database also includes data related to these optional modules. As a result, your software implementation may differ from descriptions in this guide. To find out more about the modules your organization has purchased, see your corporate purchasing agent or your Siebel sales representative.

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1 What’s New in This Release

What’s New in Siebel Automotive Guide, Version 7.7

Table 1 lists changes described in this version of the documentation to support Version 7.7 of the software.

Table 1. New Product Features in Siebel Automotive Guide, Version 7.7

Topic	Description
Managing Lease and Loan Accounts	This new feature allows you to view lease account information, contacts associated with an account, address information, agreements, vehicles associated with an account, manufacturer and dealer options and information, and title information.
Managing Lease End and Remarketing Activities	This new feature allows you to view inspection information, schedule vehicle turn in, view fair market value information, and remarket the vehicle.
Managing Manufacturer and Customer Pay	This feature was added to allow you to manage manufacturer and customer pay records.
Automotive Captive Finance Service Request Types	This feature was added to allow you to create automotive service request types. The following service request types were added to the *Siebel Finance Guide*: ■ Title Move ■ Re-lease ■ Payoff ■ Refinance ■ Extension

2 Overview

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 the following options, as shown in Table 2:

Table 2. Product Modules and Options

Option	Description
Data Modeling	Represents the entities and relationships involved in a selling model that includes a franchised distribution channel and complex product ownership and service linkages. The basic data model allows 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. 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.
Multi-Channel Communication	Provides anonymous and known contacts, channel partners, and employees with the opportunity to interact with the enterprise in the form of their choosing, whether in person, on the phone, or electronically.
Dealer and Service Center Location	A parameter-driven search allowing identification of the appropriate dealer in response to a service call or sales opportunity.
Legacy Systems Integration	Provides appropriate connections to legacy application databases required to support marketing, sales, and service activities with new or existing Dealer Business Systems.

Table 2. Product Modules and Options

Option	Description
Lead Sharing and Tracking	Captures sales opportunities that originate from any form of customer contact, associates them with any demographic information already available, and adds to the demographics based on the contact. Routes the opportunity to the appropriate party within the sales channel to provide follow-up.
Retail Sales Process Automation	Supports the sales team in a vehicle retail sales process from prospecting through opportunity origination and follow-up to sale closure and follow-up service.
Customer Loyalty and Service Marketing	Maintains ongoing contact with the retail customer to ensure satisfaction, drive service revenues, and understand needs for subsequent vehicle purchases.

3 Associating Vehicles with Accounts

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

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

This section consists of the following topics:

- Accounts Defined
- Scenarios for Working with Automotive Accounts
- Accounts Process Workflow
- Process of Using Automotive to Setup Accounts
- Process of Using Automotive for Account Management
- Associating a Vehicle with an Account
- Associating a Vehicle with an Account by Relationship

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

This consists of the following scenarios:

- Vehicle-Owned Scenario
- Vehicle-Related Scenario

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.

See Associating a Vehicle with an Account on page 18.

Vehicle-Related 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.

See 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.

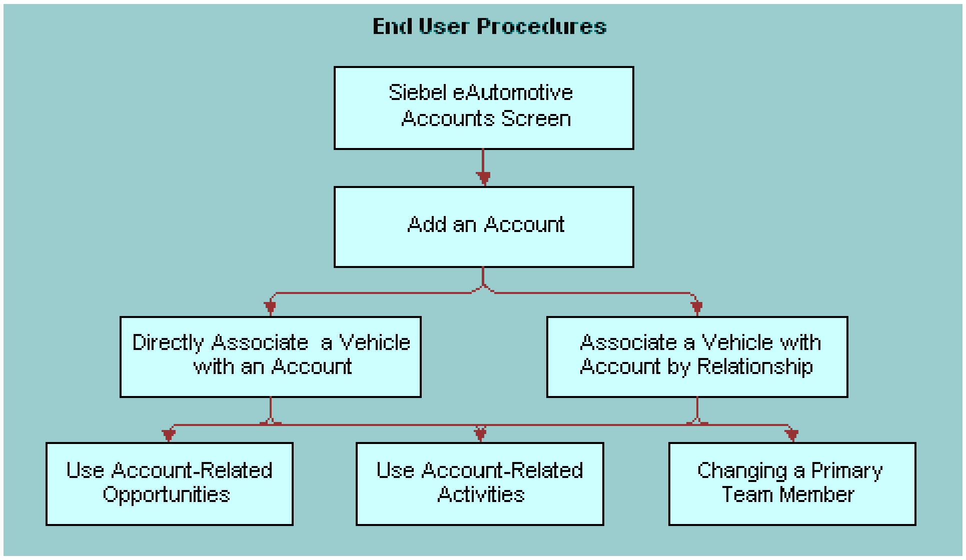

Figure 1. Accounts Workflow

More Information

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

Process of Using Automotive to Setup Accounts

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

The abbreviated tasks in this section address business reasons for maintaining data in the Accounts screen of Siebel 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 will be transferred to new account team members during territory reassignments, attrition, and other organizational changes.
Assignment Manager is not being used	You will need to: ■ Conduct routine queries to make sure that accounts with no activity are marked as inactive. ■ Make sure that all accounts have an active team or at least a primary team member assigned to the account. Otherwise, accounts that are abandoned will not show up in an end user's My Accounts list.
The account is reactivated as an opportunity later	The historical activities and opportunities associated with that account will not be 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 an abandoned account is located, you should change the account Status to Inactive.

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

Process of Using Automotive for Account Management

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

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

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

- Associating a Vehicle with an Account
- Associating a Vehicle with an Account by Relationship

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

To associate a vehicle directly with an account

1. Navigate to the Vehicles screen.
2. Select a VIN.
3. Scroll down to the Vehicles form.
4. In the Account field, select a financial account.

Related Topic

- Associating a Vehicle with an Account by Relationship

Associating a Vehicle with an Account by Relationship

This section consists of the following topics:

- About Associating a Vehicle with an Account

- Associating a Vehicle with an Account by Relationship
- Associating a Vehicle Using the Summary View

About Associating a Vehicle with an Account

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

This task is a step in Process of Using Automotive for Account Management.

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.

Related Topics

- Associating a Vehicle with an Account by Relationship
- Associating a Vehicle Using the Summary View

Associating a Vehicle with an Account by Relationship

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.

To associate a vehicle with an account by relationship

1. Navigate to the Accounts screen > Accounts List.
2. Drill down on a name.
3. Click Vehicles.
4. Scroll down to the Related Vehicles list.

5 Create a new record and select a relationship.

Related Topics

- About Associating a Vehicle with an Account
- Associating a Vehicle Using the Summary View

Associating a Vehicle Using the Summary View

This task is a step in Process of Using Automotive for Account Management.

To associate a vehicle with an account

1 Navigate to the Vehicles screen.

2 Drill down on a VIN.

3 Click Summary.

4 Scroll down to the Account list and select a vehicle and set the relationship.

Related Topics

- About Associating a Vehicle with an Account
- Associating a Vehicle with an Account by Relationship

4 Managing Contacts

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

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

A potential customer contacts the call center of World Motor Corporation (WMC), expressing interest in a vehicle. A sales representative creates a contact record in Siebel 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 Workflow

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

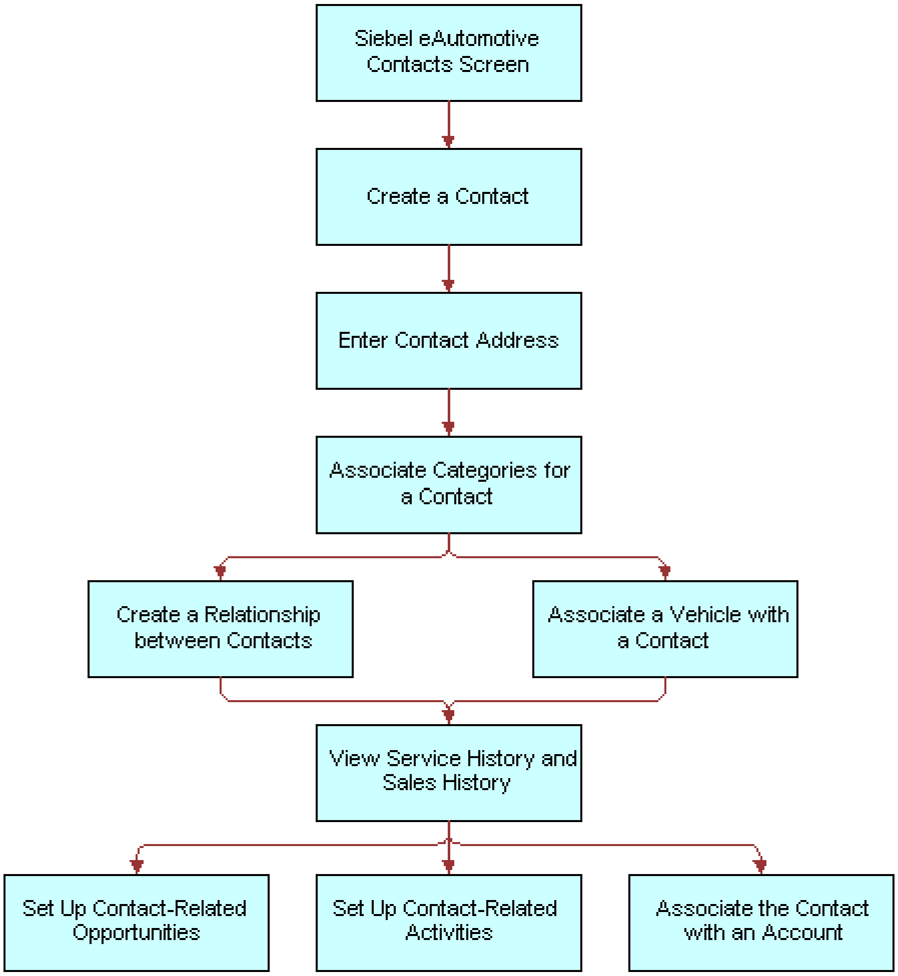

Figure 2. Contacts Workflow

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

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

Process of Using Automotive to Work with Contacts

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

For information on the following procedures, see the *Applications Administration Guide*:

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

- Managing Relationships Between Contacts
- Associating a Vehicle with a Contact
- Viewing Service History and Sales History for a Contact

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.

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

1. Navigate to the Contacts screen > Contacts List.
2. Click Relationships.
3. 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
- Viewing Service History and Sales History for a Contact
- Managing Service History Information

Associating a Vehicle with a Contact

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

This task is a step in Process of Using Automotive to Work with Contacts.

To associate a vehicle with a contact

1. Navigate to the Contacts screen > Contacts List.
2. Drill down on a contact.
3. Click Vehicles.
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

- Viewing Service History and Sales History for a Contact
- Managing Service History Information

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.

To view sales and service history information for a contact

1. Navigate to the Contacts screen > Contacts List.
2. Select the contact and take the following action:

To...	Click...
View sales history	Sales History. **NOTE:** The Sales History view is read-only. For more information on service history, see Tracking Service History on page 83.
View service history	Service history. For information on: ■ Entering service history information, see Managing Service History Information. ■ Tracking service history, see Tracking Service History on page 83.

Related Topics

- Managing Relationships Between Contacts
- Associating a Vehicle with a Contact
- Managing Service History Information

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.

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

1. Navigate to the Contacts screen > Contacts List.
2. Drill down on a contact.
3. Click Service History.
4. In the Service History list, add, edit, or delete records.

For more information on service history, see Tracking Service History on page 83.

Related Topics

- Managing Relationships Between Contacts
- Associating a Vehicle with a Contact
- Viewing Service History and Sales History for a Contact

5 Managing Dealers

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

This section consists of 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 will be used for the dealer.

Dealer Process Workflow

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

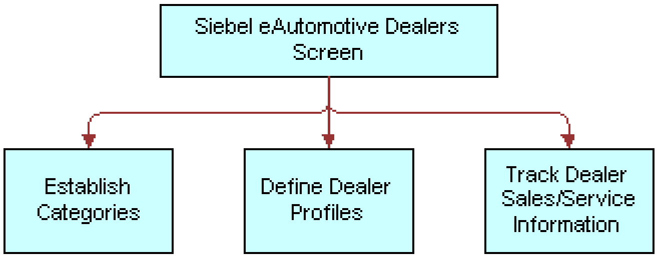

Figure 3. Dealers Workflow

NOTE: For information about procedures not covered in this book, such as updating contact and activity information, see *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. Once the administrator has created a record for the dealer, end users can add information on activities, contacts, opportunities, and agreements associated with the dealer.

This section describes the following dealer procedures for end users:

- Establishing Categories 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.

To view, edit, create, and delete a category

1. Navigate to the Dealers screen.
2. Drill down on a dealer.
3. Click Categories.
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. If the category does not appear in the dialog box, create a new record and enter information for the new category.
Category Rank	Importance of the category compared to other categories.
Value	Select the subset of the Category. The items in the Pick Value dialog box are dependent on the Category selected. If the desired value does not appear in the dialog box, create a new record and enter information for the new value.
Value Rank	Importance of the value compared to other values.

Related Topics

- Defining Dealer Profiles
- Tracking Dealer Sales and Service Information

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.

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

1. Navigate to the Dealers screen.
2. Drill down on a dealer.
3. Click Profile.
4. In the Profile form, add, edit, or delete records.

Related Topics

- Establishing Categories
- Tracking Dealer Sales and Service Information

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.

This section 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 a dealer.
3. Click Sales and Service.
4. In the Sales and Service list, add, edit, or delete records.

Related Topics

- Establishing Categories
- Defining Dealer Profiles
- Listing Days and Hours for a Dealer

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 a dealer.

3 Click Sales and Service.

4 From the Show drop-down list in the Sales and Service screen, choose Hours.

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, do the following: 1 Click New. 2 Select the day of the week. 3 Enter a Start Time and an End Time for the day.
You want to specify service department hours	In the Service Hours list, for each day of the week that the department is open, do the following: 1 Click New. 2 Select the day of the week. 3 Enter a Start Time and an End Time for the day.

Related Topics

- Establishing Categories
- Defining Dealer Profiles
- Defining Dealer Profiles

6 Managing Lease and Loan Accounts

This section provides information about standard Siebel Automotive functionality for managing lease and loan accounts. Your company's application configuration and business processes may differ from the procedures or business scenarios presented in the following sections.

This section consists of 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.

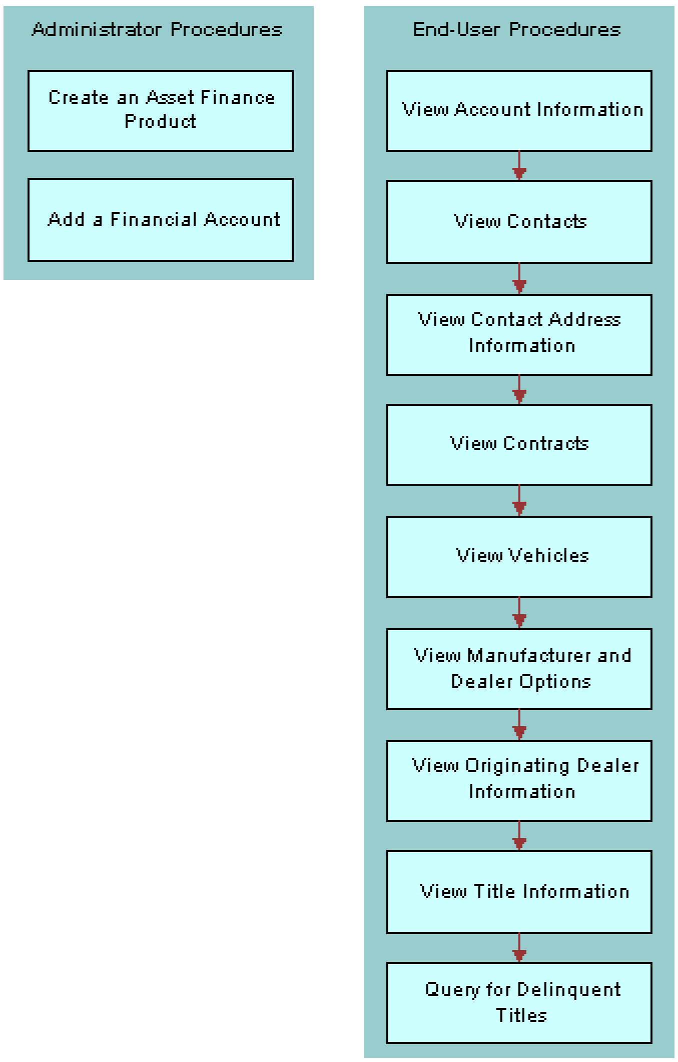

Figure 4. Automotive Accounts Sample Tasks

Financial Account Administrative Procedures

This section consists of the following topics:

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 section about products and pricing in the *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 the *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.

To create an asset finance product

1. From the application-level menu, choose Navigate > Site Map > Administration - Product > Products.
2. Create a new record.

   Complete the fields as needed.

   NOTE: Make sure that Asset Finance is the value selected in the Financial 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 will load financial account information from another system into Siebel Automotive.

For more information on uploading financial account information into Siebel Automotive, see *Siebel Enterprise Integration Manager Administration Guide*.

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 will not appear in the Financial Accounts screen.

Adding a Financial Account

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

To add a financial account

1. Navigate to the Financial Accounts screen > Financial Account List.
2. Create a record.

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

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

Process of Viewing Asset Finance Information

This section consists of the following tasks:

- Viewing Account Information
- Viewing Contacts
- Viewing Contact Address Information
- Process of Viewing Contracts
- Viewing Vehicles Associated with a Financial Account
- Viewing Manufacturer and Dealer Options
- Viewing Originating Dealer Information
- Viewing Partner and Dealer Employees
- Working with Title Information

Viewing Account Information

Use this procedure to view account information.

To view account information

1. Navigate to the Financial Accounts screen > Financial Account List.
2. Drill down on an account#.

   To see more information, click More Info.

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.

To view contacts associated with a financial account

1. Navigate to the Financial Accounts screen > Financial Account List.
2. Drill down on an account#.
3. Click Contacts.

Viewing Contact Address Information

Use this procedure to view contact address information.

To view address information for an account

1. Navigate to the Financial Accounts screen > Financial Account List.
2. Drill down on an account#.
3. Click Addresses.

Process of Viewing Contracts

This section describes viewing contracts attached to an account, viewing vehicle itemization details, and viewing line details. This section also includes a procedure for associating lease and loan contract information with a financial account.

This section consists of the following topics:

- Contracts Defined
- Viewing Agreements Attached to an Account
- Viewing Vehicle Itemized Costs

- Viewing Lease/Loan Details
- Associating a Financial Account with a Lease or Loan Agreement

Contracts Defined

Contracts, stored as agreements within Siebel Automotive, are legally binding documents executed between the lessor and the lessee. A contract is usually created by a dealership agent once 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.

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 > Financial Account List.
2. Drill down on an account#.
3. Click Agreements.

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. From the application-level menu, choose Navigate > Site Map >Agreements > Agreements List.
2. Drill down on a name.
3. Click Line Items.
4. Select a line item and click Vehicle Costs Itemization.

Viewing Lease/Loan Details

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

To view lease/loan details for an agreement

1. From the application-level menu, choose Navigate > Site Map > Agreements > Agreements List.

2 Drill down on a name.

3 Click Lease/Loan Details.

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 From the application-level menu, choose Navigate > Site Map > Agreements > Agreement List.

2 Select the agreement you want to associate with a financial account.

3 Click the show more button.

4 In the Financial Account field, select a financial account.

5 Navigate to the Financial Accounts tab > Financial Account List.

6 Drill down on the financial account you selected in Step 4.

7 Click Agreement 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.

To view vehicles associated with a financial account

1 Navigate to the Financial Accounts screen > Financial Account List.

2 Drill down on an account#.

3 Click Assets/Vehicles.

Viewing Manufacturer and Dealer Options

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

To view manufacturer and dealer options with a vehicle

1 Navigate to the Financial Accounts screen > Financial Account List.

2 Drill down on an account#.

3 Click Assets/Vehicles.

4 Scroll down to Vehicle Options.

Viewing Originating Dealer Information

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

To view originating dealer information

1 Navigate to the Financial Accounts screen > Financial Account List.

2 Drill down on an account#.

3 Click Partner/Dealer.

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.

To view partner and dealer employees

1 Navigate to the Financial Accounts > Financial Account List.

2 Drill down on an account#.

3 Click Partner/Dealer.

4 Scroll down to the Employees list.

Working with Title Information

This section consists of the following topics:

- Viewing Title Information
- Viewing Title Detail Information for a Vehicle
- Querying for Delinquent Titles

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.

To view title information associated with a financial account

1. Navigate to the Financial Accounts screen > Financial Account List.
2. Drill down on an account#.
3. Click Asset Title.
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.

To view title detail information for a vehicle

1. Navigate to the Financial Accounts screen > Financial Account List.
2. Drill down on an account#.
3. Click Asset Title.
4. Select a record and scroll down to Vehicle Title.
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.

To query for delinquent titles

1. Navigate to the Financial Account screen > Delinquent Title List.
2. Select a query from the Queries drop-down list.

   The following table lists the available queries:

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 Lease End and Remarketing Activities

This section provides information about standard Siebel Automotive functionality for managing the activities when leases end and remarketing the vehicle. These tasks include Managing Inspection Information, Managing Vehicle Turn In, Viewing Fair Market Information, Viewing the Remarketing of a Vehicle, Viewing Consignment Status, and Viewing Sale Charge Details. Your company's application configuration and business processes may differ from the procedures or business scenarios presented in the following sections.

This section consists of the following topics:

Process Workflow for Managing Lease End and Vehicle Remarketing

Figure 5 illustrates sample tasks that administrators and end users typically perform when managing a lease end and remarketing a vehicle.

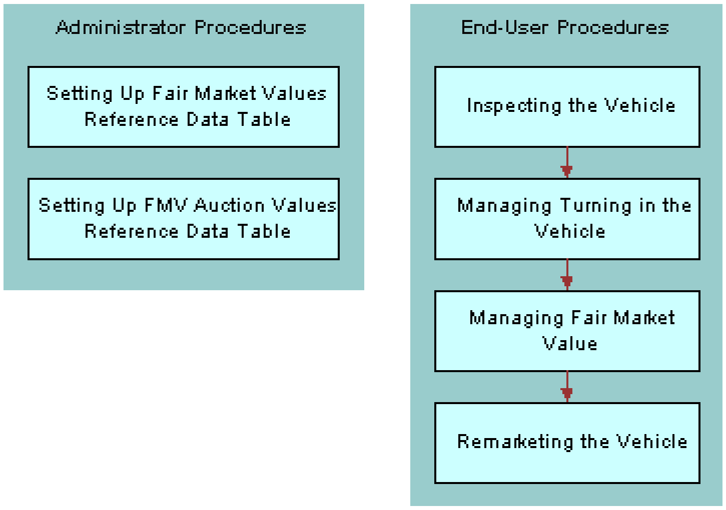

Figure 5. Automotive Lease End and Remarketing Sample Tasks

Scenario for Managing Lease End and Vehicle Remarketing

The following describes the call center agent scenario for managing lease end and remarketing a vehicle.

An agent receives a call from a customer with questions about their lease ending in a few months and what they need to do. After identifying and authenticating the customer, the call center agent views the customer's accounts. The call center agent informs the customer to take the vehicle for inspection and schedule a date for turning it in. In addition, the customer wants to know what their options are regarding buying the leased vehicle. The agent can go through the fair market value calculations and determine whether the customer will pay less than the current residual or the fair market value of the car. If the customer is not interested in buying the vehicle, then the remarketing department can decide on how to consign the vehicle for an auction.

Process of Managing Lease End and Vehicle Remarketing

The following are the lease end tasks:

1 Managing Inspection Information.

2 Managing Vehicle Turn In.

3 Process of Viewing Fair Market Value and Auction Information.

4 Viewing the Remarketing of a Vehicle.

Managing Inspection Information

An inspection can happen at dealership, at a third-party company, or at the auction site.

This section consists of the following topics:

- Viewing Inspection Information
- Viewing Body Assessment Information
- Viewing Excess Mileage Information
- Viewing Parts and Other Charges
- Ordering a Batch Inspection

Viewing Inspection Information

Use this procedure to view inspection information.

To view inspection information

1. Navigate to the Financial Accounts screen > Financial Account List.
2. Drill down on an account#.
3. Click Asset Inspection.
4. In the Asset Inspection list, add, edit, or delete records.

Viewing Body Assessment Information

Use this procedure to view body assessment information and determine costs.

To view body assessment information

1. Navigate to the Financial Accounts screen > Financial Account List.
2. Drill down on an account#.
3. Click Asset Inspection.
4. Select a record and scroll down to Body Assessment.
5. In the Body Assessment form list, add, edit, or delete records.

Viewing Excess Mileage Information

Use this procedure to view excess mileage information and to determine charges.

To view excess mileage information

1. Navigate to the Financial Accounts screen > Financial Account List.
2. Drill down on an account#.
3. Click Asset Inspection.
4. Select a record and scroll down to Excess Usage.
5. In the Excess Usage form, add, edit, or delete records.

Viewing Parts and Other Charges

Use this procedure to view miscellaneous charges such as parts and other charges.

To enter parts and other charge information

1. Navigate to the Financial Accounts screen > Financial Account List.
2. Drill down on an account#.
3. Click Asset Inspection.
4. Select a record and scroll down to Parts and Other Changes.
5. In the Parts and Other Charges list, add, edit, or delete records.

Ordering a Batch Inspection

When a user orders a batch inspection, the system creates individual inspection records for each of the financial account selected.

To order a batch inspection

1. Navigate to the Financial Accounts screen > Vehicle Batch Order Inspection List.
2. Select the records in the list for which the user wants to order an inspection.
3. In the Pick Inspection Company and Type form, select an inspection company and inspection type.
4. Click Schedule Inspection.

Managing Vehicle Turn In

Use this procedure for scheduling turning in of the vehicle when the lease ends.

To manage vehicle turn in

1. Navigate to the Financial Accounts screen > Financial Account List.
2. Drill down on an account#.
3. Click Asset Turn In.
4. In the Asset Turn In list, add, edit, or delete records.

Fair Market Values Administrative Procedures

This section consists of the following topics:

- Setting Up the FMV Fair Market Values
- Setting Up the FMV Auction Values

Setting Up the FMV Fair Market Values

Use this table to store the fair market values of vehicle products (typically of vehicle products that do not have enough auction data points) to facilitate Fair Market Value calculations.

To set up the fair market values reference data table

1. From the application-level menu, choose Navigate > Site Map > Administration - Application > Fair Market Values Reference Data.
2. In the Fair Market Values Reference Data list, view, edit, create, and delete records.

Setting Up the FMV Auction Values

Use this table to store the auction values of vehicle products to facilitate auction value calculations.

To set up the auction values reference data table

1. From the application-level menu, choose Navigate > Site Map > Administration - Application > FMV Auction Values Reference Data.
2. In the FMV Auction Values Reference Data list, view, edit, create, and delete records.

Process of Viewing Fair Market Value and Auction Information

During lease-end, the dealer is usually obligated to buy the vehicle from the financing company under various purchase agreements between the dealer and the financing company. The dealer will pay the fair market value of the vehicle when purchasing it back.

This section consists of the following topics:

For information on setting up the FMV Fair Market Values Reference table and the FMV Auction Values Reference Data table, see Fair Market Values Administrative Procedures on page 47.

Viewing Fair Market Information

Use this procedure to view Fair Market Value (FMV) and Auction Value information.

To view fair market value information

1. Navigate to the Financial Accounts screen > Financial Account List.
2. Drill down on an account#.
3. Click Fair Market Value.
4. In the Calculation Type field, select FMV.

   In the Fair Market Value list, you can add, edit, or delete records.

Viewing Fair Market Value Detail Information

Use this procedure to view Fair Market details for the selected line.

To view fair market value detail information

1. Navigate to the Financial Accounts screen > Financial Account List.
2. Drill down on an account#.
3. Click Fair Market Value.
4. Select a record and scroll down to the Fair Market Value form.

5 In the Calculation Type field, select FMV.

In the Fair Market Value list, you can add, edit, or delete records.

Viewing Auction Value Information

Use this procedure to view auction value information.

To view auction value information

1. Navigate to the Financial Accounts screen > Financial Account List.
2. Drill down on an account#.
3. Click Fair Market Value.
4. In the Calculation Type field, select Auction.

   In the Fair Market Value list, you can add, edit, or delete records.

Viewing Auction Value Detail Information

Use this procedure to view details for the selected line.

To view fair market value detail information

1. Navigate to the Financial Accounts screen > Financial Account List.
2. Drill down on an account#.
3. Click Fair Market Value.
4. Select a record and scroll down to the Fair Market Value form.
5. In the Calculation Type field, select Auction.

   In the Fair Market Value form, add, edit, or delete records.

Process of Vehicle Remarketing

This section consists of the following topics:

- Viewing Consignment Status
- Viewing Sale Charge Details

Viewing the Remarketing of a Vehicle

Use this procedure to view the remarketing of a vehicle.

To view the remarketing of a vehicle

1. Navigate to the Financial Accounts screen > Financial Account List.
2. Drill down on an account#.
3. Click Consignment Management.
4. In the Consignment Management form, add, edit, or delete records.

Viewing Consignment Status

Use this procedure to view the different actions as the consignment moves through the disposal process.

To view the consignment status

1. Navigate to the Financial Accounts screen > Financial Account List.
2. Drill down on an account#.
3. Click Consignment Management.
4. Scroll down to Consignment Status.
5. In the Consignment Status list, add, edit, or delete records.

Viewing Sale Charge Details

Use this procedure to view line item details of charges imposed by the seller.

To view sale charge details

1. Navigate to the Financial Accounts screen > Financial Account List.
2. Drill down on an account#.
3. Click Consignment Management.
4. Scroll down to Sale Charge Details.
5. In the Sales Charge Details list, add, edit, or delete records.

8 Managing Vehicles

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

This section consists of 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 VIN and drills down on the VIN to access the Vehicles screen.

NOTE: In Siebel Automotive, 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 6 illustrates the end-user workflow for working with vehicles.

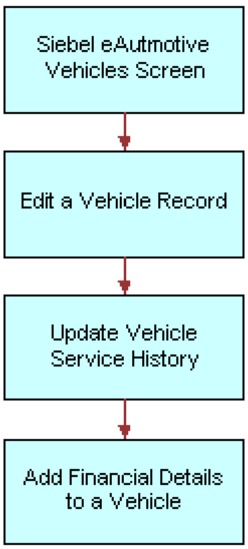

Figure 6. Vehicles Workflow

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

Entering Vehicle Records

Most vehicle records are entered into Siebel Automotive through EIM rather than through manual entry. Use 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 From the application-level menu, choose Navigate > Site Map > Administration - Vehicle.

2 In the Vehicles list, add, edit, or delete a record.

Process of Using Automotive to Manage Vehicle Records

This section describes the following vehicle procedures for end users:

- Editing a Vehicle Record
- Changing Vehicle Status
- Deleting a Vehicle
- Updating Vehicle Service History
- Managing Vehicle Financial Details

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 Using Automotive to Manage Vehicle Records.

To edit a vehicle record

1. Navigate to the Vehicles screen.
2. Drill down on a VIN.
3. Make changes to the record as needed.

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

NOTE: For fleet information, drill down on a VIN and 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
- Deleting a Vehicle
- Updating Vehicle Service History
- Managing Vehicle Financial Details

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 Using Automotive to Manage Vehicle Records.

For more information about vehicle allocation, see "Allocating Vehicles to a Quote" on page 75.

To change the status of a vehicle

1. From the application-level menu, choose Navigate > Site Map > Administration - Vehicle.
2. Drill down on a vehicle.
3. Click More Info.
4. In the Inventory Information section, select the new status from the Status drop-down list.

Related Topics

- Editing a Vehicle Record
- Deleting a Vehicle
- Updating Vehicle Service History
- Managing Vehicle Financial Details

Deleting a Vehicle

Use this procedure to delete a vehicle.

This task is a step in Process of Using Automotive to Manage Vehicle Records.

To delete a vehicle

1. From the application-level menu, choose Navigate > Site Map > Administration - Vehicle.
2. Select a vehicle and click Delete.

Related Topics

- Editing a Vehicle Record
- Changing Vehicle Status
- Updating Vehicle Service History
- Managing Vehicle Financial Details

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 Using Automotive to Manage Vehicle Records.

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

1. From the application-level menu, choose Navigate > Site Map > Administration - Vehicle.
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.

   Some fields are described in the following table.

Field	Description
SH #	Service History number, automatically generated by Siebel Automotive.

Related Topics

- Editing a Vehicle Record
- Changing Vehicle Status
- Deleting a Vehicle
- Managing Vehicle Financial Details

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 Using Automotive to Manage Vehicle Records.

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

1. From the application-level menu, choose Navigate > Site Map > Administration - Vehicle.
2. Drill down on a VIN.
3. Click Financial Detail.
4. In the Financial Detail list, add, edit, or delete records.

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

Related Topics

- Editing a Vehicle Record

- Changing Vehicle Status
- Deleting a Vehicle
- Updating Vehicle Service History

9 Managing Products

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

This section consists of the following topics:

Types of Products

There are two main types of products in Siebel Automotive:

- Products of Type = Vehicle and Type = Option.
- Product of Type = Option can be associated with a product of Type = Vehicle.

  Once this association has been made, the options associated with the vehicle product become valid options for the vehicle product.

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

About the List of Valid Vehicle Options

Additionally, 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 process that is described in *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 7 illustrates the administrator workflow for working with products.

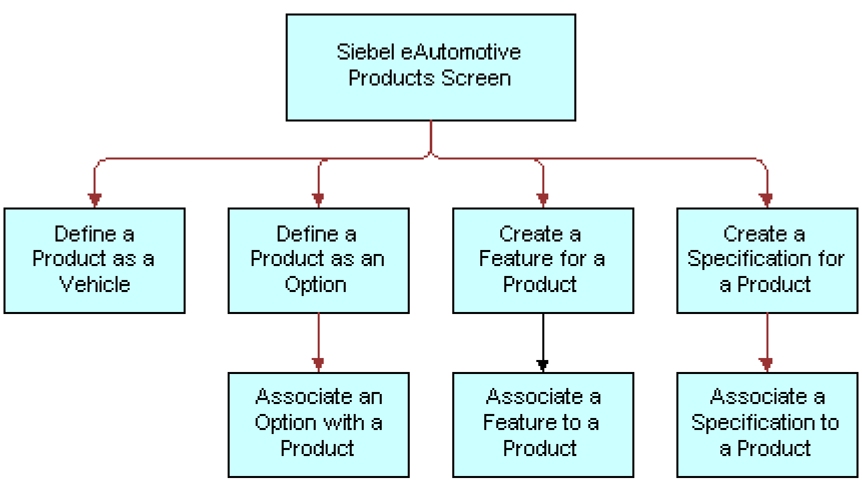

Figure 7. Products Workflow

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

Process of Using Automotive to Manage 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.

This section describes the following product procedures for administrators:

- Managing a Product's Information.
- Process of Associating Valid Options with a Product.
- Process of Adding Product Features and Specifications.

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 Using Automotive to Manage Products.

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

1. From the application-level menu, choose Navigate > Site Map > Administration - Product.
2. In the Products form, add, edit, or delete records.

Related Topics

- Process of Associating Valid Options with a Product
- Process of Adding Product Features and Specifications

Process of 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 Using Automotive to Manage Products.

This section consists of the following topics:

- Defining a Product as an Option
- Associating an Option with a Product of Type=Vehicle

Related Topics

- Managing a Product's Information
- Process of Adding Product Features and Specifications

Defining a Product as an Option

Use this procedure to define a product as an option.

This task is a step in Process of Associating Valid Options with a Product.

To define a product as an option

1. From the application-level menu, choose Navigate > Site Map > Administration - Product.
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 remaining fields as needed.

Related Topic

- Associating an Option with a Product of Type=Vehicle

Associating an Option with a Product of Type=Vehicle

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

This task is a step in Process of Associating Valid Options with a Product.

To associate an option with a product of Type = Vehicle

1. From the application-level menu, choose Navigate > Site Map > Administration - Product.
2. Click Valid Options.
3. In the Valid Options list, add, edit, or delete records.

Related Topic

- Associating an Option with a Product of Type=Vehicle

Process of 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 Using Automotive to Manage Products.

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

This section consists of the following topics:

- Working with Product Features
- Associating a Feature with a Product
- Working with Product Specifications
- Associating a Specification with a Product

Related Topics

- Managing a Product's Information
- Process of Associating Valid Options with a 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 Process of Adding Product Features and Specifications.

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

1. From the application-level menu, choose Navigate > Site Map > Administration - Product > Product Features.
2. In the Product Features list, add, edit, or delete records.

Related Topics

- Associating a Feature with a Product
- Working with Product Specifications
- Associating a Specification with a Product

Associating a Feature with a Product

Use this procedure to associate a feature with a product.

This task is a step in Process of Adding Product Features and Specifications.

To associate a feature with a product

1. From the application-level menu, choose Navigate > Site Map > Administration - Product > Products.
2. Click Features.
3. In the Features list, create a new record.
4. In the Category field, select the category for the feature you just created in Working with Product Features.
5. Complete the remaining fields as needed.

Related Topics

- Working with Product Features
- Working with Product Specifications
- Associating a Specification with a Product

Working with Product Specifications

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

This task is a step in Process of Adding Product Features and Specifications.

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

1. From the application-level menu, choose Navigate > Site Map > Administration - Product > Specifications.
2. In the Specification list, add, edit, or delete records.

Related Topics

- Working with Product Features
- Associating a Feature with a Product
- Associating a Specification with a Product

Associating a Specification with a Product

Use this procedure to associate a specification with a product.

This task is a step in Process of Adding Product Features and Specifications.

To associate a specification with a product

1. From the application-level menu, choose Navigate > Site Map > Administration - Product > Products.
2. Select the product.
3. Click Specifications.
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.
6. Complete the remaining fields as needed.

Related Topics

- Working with Product Features
- Associating a Feature with a Product
- Working with Product Specifications

10 Associating Vehicles with Opportunities

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

This section consists of 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. From the application-level menu, choose Navigate > Site Map > Opportunities > List.
2. Drill down on an opportunity.
3. Click Revenues.
4. Select List.
5. In the List, add, edit, or delete records.
6. Complete the fields as needed. Some fields are described in the following table.

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

11 Setting Up Households

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

This section consists of the following topics:

Households Defined

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

Households are optional and are not required to effectively use Siebel 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 Siebel Analytics to segment household data to target households that meet various demographic and purchasing trend criteria.

Scenario for Working with Households

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

A sales representative at an auto dealership sold a vehicle to a customer who is a 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 since they are going to different colleges, the household will need 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 Using Automotive to Work 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 the *Applications Administration Guide*. Additionally, application administrators may perform end user procedures described in this chapter.

This section describes the following household procedures for end users:

- Viewing Vehicles Associated with a Household
- Associating Team Members with a Household on page 69

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 Using Automotive to Work With Households.

To view vehicles associated with a household

1. From the application-level menu, choose Navigate > Site Map > Households > List.
2. Drill down on the household name.
3. Click Vehicles.

Related Topic

- Associating Team Members with a Household

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 per 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 Using Automotive to Work With Households.

To associate team members with a household

1. From the application-level menu, choose Navigate > Site Map > Households > List.
2. Select a household.
3. In the Team field, add one or more team members.

Related Topic

- Viewing Vehicles Associated with a Household

12 Managing Quotes

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

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

This section consists of the following topics:

About Quotes

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.

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

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 8 illustrates the end-user workflow for working with quotes.

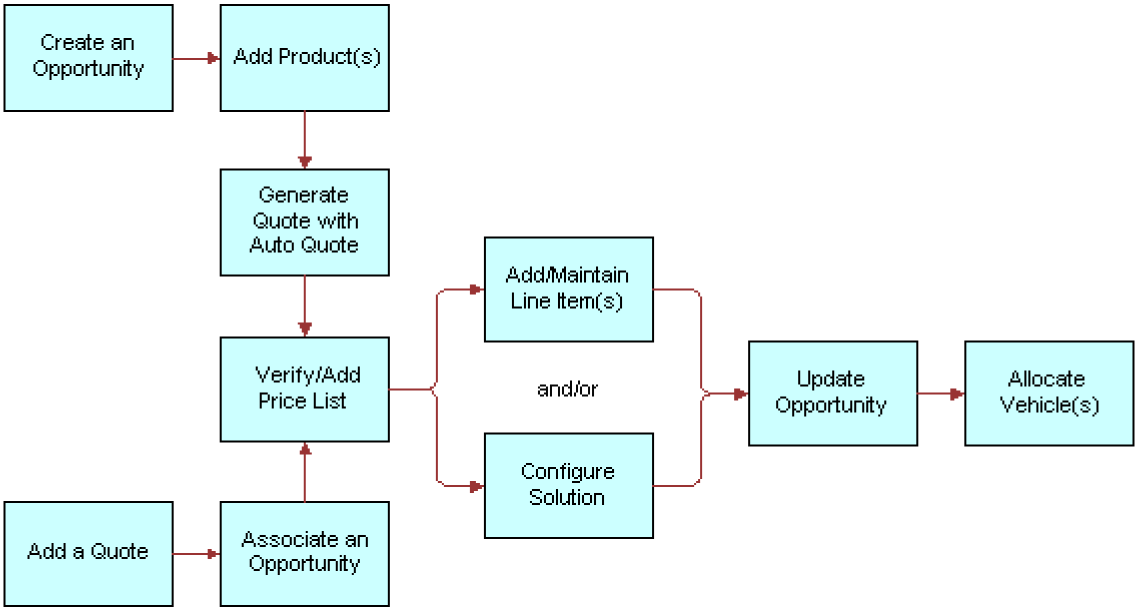

Figure 8. Quotes Workflow

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

Process of Creating Quotes

This section describes the following quote procedures for end users:

- Setting the Price List for Quotes
- Creating Quotes
- Copying or Revising a Quote
- Allocating Vehicles to a Quote

Setting the Price List for Quotes

Before creating a quote, use this procedure to set the default price list that will be used in the quote process.

This task is a step in Process of Creating Quotes.

To set a default price list

1. From the application-level menu, choose User Profile Preferences > User Preferences > Price List Sales Methodology.
2. In the Price List field, select the price list that will be used 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
- Copying or Revising a Quote
- Allocating Vehicles to a Quote

Creating Quotes

Use this procedure to create quotes.

This task is a step in Process of Creating Quotes.

To create a new quote

1. From the application-level menu, choose Navigate > Site Map > Quotes > List.
2. From the Show drop-down list, select My Quotes.
3. In the Quotes list, create a new record.
4. Complete the fields as needed.

Related Topics

- Setting the Price List for Quotes
- Copying or Revising a Quote
- Allocating Vehicles to a Quote

Copying or Revising a Quote

This section consists of two ways to create a quote based on an existing quote:

- Using Copy Record to Copy or Revise a Quote
- Using Revise to Copy or Revise a Quote

This task is a step in Process of Creating Quotes.

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
- Creating Quotes
- Allocating Vehicles to a Quote

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. From the application-level menu, choose Navigate > Site Map > Quotes > List.
2. Select the record.
3. Click the menu button and select Copy Record.

   The following action takes place:

   - 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
- Creating Quotes
- Copying or Revising a Quote
- Allocating Vehicles to a Quote

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. From the application-level menu, choose Navigate > Site Map > Quotes > List.
2. Select the record.
3. Click Revise.

   The following action takes place:

   - 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
- Creating Quotes
- Copying or Revising a Quote
- Allocating Vehicles to a Quote

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.

To allocate vehicles to a quote

1. From the application-level menu, choose Navigate > Site Map > Quotes > List.
2. Drill down on a quote #.

3. Click Vehicles.
4. Select the product 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# 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.

Related Topics

- Creating Quotes
- Copying or Revising a Quote

13 Managing Service Requests

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

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

This section consists of 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 Request

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

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

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.

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

- Creating a Service Request
- Assigning the Service Request
- Providing Details of Services to Be Performed
- Researching and Resolving a Service Request

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 section on service requests in the *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.

NOTE: There are many different account service request types available for automotive captive finance companies. For details, see the Account Services section on service requests in the *Siebel Finance Guide*.

To create a service request

1. From the application-level menu, choose Navigate > Site Map > Service Requests > Service Request List.
2. From the Show drop-down list, 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 needed.

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

Assigning the Service Request

This section consists of three ways to assign a service request:

- Assigning the Service Request Manually
- Using Assignment Manager to Assign Service Requests
- Assigning Service Requests Using Dealer Assignment

This task is a step in Process of Working with Service Requests.

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. From the application-level menu, choose Navigate > Site Map > Service Requests > Service Request List.
2. Select All Service Requests.
3. Select a SR#.
4. Click the show more button.
5. In the Sub Status field, select Assigned.

6 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. From the application-level menu, choose Navigate > Site Map > Service Requests > Service Request List.
2. From the Show drop-down list, select All Service Requests.
3. Select a SR#.
4. Click the menu button, and click 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. From the application-level menu, choose Navigate > Site Map > Service Requests > Service Request List.
2. Drill down on a SR#.

3 Click Dealer Assignment and take the following action:

To...	Then...
Assign the service request	Select one of the following options from the Automatically Assign Service Request to a Dealer drop-down list: ■ Preferred Service Dealer ■ Selling Dealer **NOTE:** For a service request to be assigned to either of the two values, they should have been set for the vehicle. For more information about setting values for a vehicle, see Editing a Vehicle Record on page 53.
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.

To provide details of services to be performed

1 From the application-level menu, choose Navigate > Site Map > Service Requests > Service Request List.

2 Drill down on a SR#.

3 Click Services To Be Performed.

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.

To research and resolve a service request

1. From the application-level menu, choose Navigate > Site Map > Service Requests > Service Request List.
2. Drill down on an open SR# you want to resolve.
3. To view related service requests, click the Related SRs tab to see if the problem has been solved before.

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

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 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.

14 Tracking Service History

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

This sections consists of the following topics:

- Benefits of Tracking Services and Repairs
- Scenario for Tracking Automotive Service History Scenario
- Process of Tracking Service History
- Creating a New Service History Record
- Managing Services Performed
- Managing Manufacturer and Customer Pay
- Working with Service History

Benefits of Tracking Services and Repairs

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

Automotive Industry Party	Benefit
Customers	Can track the following: ■ What is happening with their vehicle. ■ Costs of repairs and service for their vehicles, which is also helpful when selling the vehicle. Having a track record of services and repairs performed on the vehicle will make it easier to sell the vehicle, hopefully earning a premium on the price if the vehicle has not had major problems. **NOTE:** For a customer, Service Request and Service History are two completely separate entities. Customers use a Service Request to request an action, such as a repair, and they use the Service History to track all past services and repairs on their vehicles. Customers can also see their service history in their eService portal.
Manufacturers (OEMs)	Can track the following: ■ All services that customers have done on their vehicles. This gives the OEM information about vehicle quality and the service patterns of customers. ■ When customer’s come to their Web site to track service and repair history. It provides an opportunity for OEMs to market their products to customers.
Dealers	Can track the following: ■ Service and repair patterns of customers. ■ History of all services performed on a customer’s vehicle when the customer walks into the dealership. This helps dealers service the customer better. **NOTE:** Dealers report their service transactions to the manufacturers using proprietary interfaces. The manufacturers load that data into Siebel Automotive using EIM. That data can be used by manufacturers who create targeted marketing campaigns and also for personalized interactions.

Scenario for Tracking Automotive Service History Scenario

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

Usually, dealers report service history for vehicles that are under warranty, using the same manufacturer-provided interface that they use to report sales. The manufacturer can import this data into Siebel 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 will be 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.

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

- Creating a New Service History Record
- Managing Services Performed
- Managing Manufacturer and Customer Pay
- Working with Service History

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.

To create a service history record

1. From the application-level menu, choose Navigate > Site Map > Service History > Service History.

2 In the Service History list, create a new record.

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

Field	Description
SH #	Service history number, automatically populated by the system.

Related Topics

- Managing Services Performed
- Managing Manufacturer and Customer Pay
- Working with Service History

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.

To view, edit, create, and delete services performed

1. From the application-level menu, choose Navigate > Site Map > Service History > Service History.
2. Drill down on a SR#.
3. Click Services Performed.
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
- Managing Manufacturer and Customer Pay
- Working with Service History

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.

To manage manufacturer and customer pay

1. From the application-level menu, choose Navigate > Site Map > Service History > Service History.
2. Drill down on a SR#.
3. Click Labor Option Codes.

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
- Managing Services Performed
- Working with Service History

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.

To view, edit, create, and delete the service history for a particular vehicle

1. Navigate to the Vehicles screen.
2. Drill down on a VIN.
3. Click Service History.
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 > Contacts List.
2. Drill down on a contact.
3. Click Service History.
4. In the Service History list, add, edit, or delete records.

Related Topics

- Creating a New Service History Record
- Managing Services Performed

- Managing Manufacturer and Customer Pay

15 Tracking Sales History

This section provides information about standard Siebel Automotive functionality for tracking sales history. Your company's application configuration and business processes may differ from the procedures or business scenarios presented in the following sections.

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

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

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

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.

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

- Creating a New Sales History Record
- Viewing Sales History

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.

To create a sales history record

1. From the application-level menu, choose Navigate > Site Map > Sales History.
2. In the Sales History list, create a new record.

Related Topic

- Viewing Sales History

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.

To view the sales history for a particular vehicle

1. Navigate to the Vehicles screen.
2. Select a VIN.
3. Click Sales History.

To view the sales history for a particular contact

1. Navigate to the Contacts screen > Contacts List
2. Select a contact.
3. Click Sales History.

Related Topic

- Creating a New Sales History Record

16 Setting Up Preventive Maintenance

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

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

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

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

This section consists of the following topics:

- Scenarios for Working with Automotive Preventive Maintenance
- Process of Setting Up Preventive Maintenance
- Setting a Trigger for a PM Plan
- Associating a PM Plan with a Product
- Associating a PM Plan with Vehicles
- Process of Using Automotive for Preventive Maintenance
- Viewing PM History for a Vehicle
- Working with PM Plans for a Vehicle

Scenarios for Working with Automotive Preventive Maintenance

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

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

- Periodic Maintenance Scenario
- Triggered Maintenance Scenario

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*.

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

- Setting a Trigger for a PM Plan
- Associating a PM Plan with a Product
- Associating a PM Plan with Vehicles

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.

To set up a trigger for a PM plan

1 From the application-level menu, choose Navigate > Site Map >Preventive Maintenance > Preventive Maintenance List.

2 Select a PM plan.

3 Click Triggers and take the following action:

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

In the...	You can...
Time Interval list	Add, Edit, or Delete records.
Usage list	
Month-Day list	
Threshold list	
Event list	

Related Topics

- Associating a PM Plan with a Product
- Associating a PM Plan with Vehicles

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 for more information on using Products.

This task is a step in Process of Setting Up Preventive Maintenance.

To associate a PM plan with a product

1 From the application-level menu, choose Navigate > Site Map > Preventive Maintenance > Preventive Maintenance List.

2 Select a PM plan.

3 Click Products.

4 In the Products list, add, edit, or delete records.

Related Topics

- Setting a Trigger for a PM Plan
- Associating a PM Plan with Vehicles

Associating a PM Plan with Vehicles

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

This task is a step in Process of Setting Up Preventive Maintenance.

To associate a PM plan with a vehicle or vehicles

1. In the application-level menu, choose Navigate > Site Map > Preventive Maintenance > Preventive Maintenance List.
2. Select a PM plan.
3. Click Products.
4. Select a product.
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
- Associating a PM Plan with a Product

Process of Using Automotive for 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.

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

- Viewing PM History for a Vehicle
- Working with PM Plans for a Vehicle

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 Using Automotive for Preventive Maintenance.

To view PM history for a vehicle

1. Navigate to the Vehicles screen.
2. Drill down on a VIN.
3. Click Preventive Maintenance.
4. Select History, 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. It could be mileage, or oil level, and so on.
6. To view more details about the preventive maintenance plan, click the hyperlink in the Plan Item Name field.

Related Topic

- Working with PM Plans for a Vehicle

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 Using Automotive for Preventive Maintenance.

To view, edit, create, and delete PM plans for a vehicle

1. Navigate to the Vehicles screen.
2. Drill down on a VIN.
3. Click Preventive Maintenance.
4. Select Plan.
5. In the Plan list, add, edit, or delete records.

Related Topic

- Viewing PM History for a Vehicle

17 Setting Up and Using Siebel Automotive Tools

This section covers how to set up and use three tools available for Siebel Automotive users:

- Dealer Locator
- Vehicle Inventory Search
- Financial Calculator

The following topics are discussed:

Process of Locating a Dealer

The steps in this process are as follows:

- Setting Up the Dealer Locator
- Locating a Dealer

Setting Up the Dealer Locator

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.

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

To set up a dealer location

1. From the application-level menu, open Navigate > Site Map > Administration - Application > Dealer Location Administration.

2 In the Dealer Locations list, add, edit, or delete records.

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

Field	Description
Latitude	Latitude number (0 to +/- 90; '+' for the Northern Hemisphere and '-' for the Southern Hemisphere).
Longitude	Longitude number (0 to +/- 180; '+' for the Eastern Hemisphere and '-' for the Western Hemisphere).

Locating a Dealer

Use this procedure to locate dealers by the contact information for the dealer.

This task is a step in Process of Locating a Dealer.

To locate a dealer

- From the application-level menu, choose Navigate > Site Map > Automotive Tools > Dealer Location.

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 will find. For example, typing `Fern*` in the City field will match all cities with names that begin with Fern. Typing 9461* in the ZIP Code field will match all ZIP Codes that begin with 9461.

Process of Searching for a Vehicle

The steps in this process are as follows:

- Setting Up Vehicle Search
- Searching for a Vehicle

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 will display 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.

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

To set up vehicle search

1 From the application-level menu, choose Navigate > Site Map > Administration - Vehicle.

2 Select a VIN.

3 In the Vehicles form applet, complete the following fields, along with any other fields as needed.

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.

To search for a vehicle in inventory

1 From the application-level menu, choose Navigate > Site Map > Automotive Tools > Vehicle Inventory Search.

2 Enter city and state or ZIP Code.

3 Click the 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. Once that information has been entered, multiple calculations for leases and loans can be generated by changing the terms.

To calculate the lease and loan prices of a vehicle

1 From the application-level menu, choose Navigate > Site Map > Automotive Tools > Financial Calculator.

2 Enter values in the fields and click Calculate.

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