SIEBEL eBusiness 7

SIEBEL *e*DEALER ADMINISTRATION GUIDE

VERSION 7.5, REV. A

12-FNUZ5S

APRIL 2003

Contents

Chapter 1. Administering Siebel eDealer

Administering Siebel eDealer 1

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

This guide to administering Siebel eDealer covers the following topics:

Introduction

This guide will be useful primarily to people whose title or job description matches one of the following:

Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Dealer Administrators	Persons responsible for planning and setting up dealer operations and dealership users.
Dealer Relationship Managers	Persons at an OEM responsible for managing the relationships with dealers.
Dealer General Managers	Persons responsible for defining the overall strategy for the dealership.

How This Guide Is Organized

This document covers only features of Siebel eDealer that are different from the features of Siebel Partner Relationship Management (Siebel PRM). It is meant to be used as a supplement to the documentation for Siebel PRM, which is in *Siebel Partner Relationship Management Administration Guide*. It begins with an overview of how Siebel eDealer differs from Siebel PRM. Then it describes differences that apply to specific chapters of *Siebel Partner Relationship Management Administration Guide*.

Revision History

Siebel eDealer Administration Guide, Version 7.5, Rev. A

April 2003 Bookshelf

Table 1. Changes Made in Rev. A for April 2003 Bookshelf

Topic	Revision
"Introduction" on page 6	Added this section
"Siebel eDealer Partner Portal Screens" on page 12	Added information about the Reassign button in the Partner Portal.

About Siebel eDealer

Siebel eDealer is used as follows:

- To set up Siebel eDealer, the manufacturer goes through the process of enrolling dealer companies. The manufacturer can add these companies' employees and suborganizations or can assign this task to a delegated administrator at each dealer company.
- Then, the manufacturer can share opportunities, service requests, and other business information with dealer employees in the same way as you do with your own employees.
  - The manufacturer's employees work with this information using Siebel Partner Manager, which lets them manage this information in the same way they do using Siebel eAutomotive.
  - Dealer employees view and work with this information using Siebel eDealer.
- The manufacturer can also use Siebel Partner Manager to:
  - Send alerts, information about special promotions, and Web messages to dealers.
  - Work collaboratively with dealers to develop plans to meet strategic goals.
  - Analyze dealer effectiveness, forecast revenue, manage market development funds, and analyze performance.
- Dealers can also use Siebel eDealer to:
  - Keep a log of customers who come into the showroom, and assign these customers to sales consultants.
  - Manage information about sales opportunities and customers.
  - Automatically send follow-up messages to customers after sales.
  - Automatically notify sales consultants when they should contact customers to follow up after sales.
  - Set up sales steps that sales consultants follow when they deal with potential customers.
  - Analyze performance of sales consultants.

- Create yearly sales budgets and monthly sales forecasts.

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

Overview of Differences from Siebel PRM

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

The most important differences are:

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

    - Showroom Log
    - Unassigned Opportunities
    - Employee Performance
    - Sales Step Administration
    - Employee and Customer Communication Rule Administration
    - Budget
    - Forecast
    - Budgets and Forecasts Administration

- **Added screens for the automotive industry.** In addition to the screens in Siebel PRM, Siebel eDealer has added screens with information specific to the automotive industry, which are available in both Siebel Partner Manager and in Siebel eDealer. Added screens include:
    - Vehicles
    - Vehicle Administration
    - Product
    - Sales History
    - Service History

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

- Opportunities

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

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

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

Differences in the Partner Portal and Partner Manager

The overview chapter of *Siebel Partner Relationship Management Administration Guide* describes the screens of Siebel Partner Portal and the Siebel PRM-specific screens of Siebel Partner Manager. In Siebel eDealer, a number of screens in Siebel Partner Portal and Siebel Partner Manager are different from Siebel PRM.

Siebel eDealer Partner Portal Screens

In addition to the screens of the Siebel PRM partner portal, Siebel eDealer partner portal has the following screens that are used by the dealer company to manage its operations:

- **Showroom Log.** Allows dealers to enter information about potential customers who enter the showroom.
- **Unassigned Opportunities.** Allows dealers to assign unassigned opportunities to sales consultants.
- **Employee Performance.** Allows dealers to evaluate employee performance on activities and opportunities.
- **Sales Step Administration.** Allows dealers to create sales steps which sales consultants follow when they deal with customers.
- **Employee and Customer Communication Rule Administration.** Allows dealers to create rules that automatically send communications to customers to follow up on sales and to sales consultants to remind them to follow up on sales.
- **Budget.** Allows dealers to plan their sales for the next year.
- **Forecast.** Allows dealers to plan their monthly sales.
- **Budgets and Forecasts Administration.** Allows dealers to administer the budgets and forecasts of the employees and of the entire store for the year.

In addition to the screens of Siebel PRM partner portal, Siebel eDealer partner portal has the following screens that are equivalent to screens in Siebel eAutomotive:

- **Vehicles.** Provides information about vehicles.
- **Vehicle Administration.** Allows users to administer information about vehicles.

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

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

In Siebel eDealer, the Opportunities screen also has these added features:

- **Reassign button.** Used to assign opportunities to a different sales consultant. If you click this button, it will reassign only open opportunities.
- **Opportunities Filter applet.** At the top of the screen and used to filter records in the Opportunities list below. Enter a value in the Sales Stage, New/Used, Sales Team, or Created Date field of the Opportunities Filter applet, and click Go to display only opportunities with the matching value in that field.

In Siebel eDealer, the Contacts screen also has this added feature:

- **Reassign button.** Used to assign activities and opportunities to a different sales consultant. If you click this button, all the open activities where the Done flag is null will be reassigned, and all the open opportunities will also be reassigned.

The home page is also different in Siebel eDealer than in Siebel PRM. Siebel eDealer has two home pages:

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

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

Siebel Partner Manager and Siebel eAutomotive Screens

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

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

Siebel eAutomotive includes the following screens with information specific to the automotive industry, which are not available in Siebel PRM:

- **Dealers.** The Dealers screen lets you record general information about your dealers. It also helps you manage your relationship with your dealers. For example, it lets you work with the Dealer Profile, and it lets you enter and look up dealer management activities, contacts, and hours.
- **Dealer Operations.** The Dealer Operations screen lets dealer managers view the transactional data for a given dealer, to give you an overall view of the dealer's operations. You can look up a dealer, and see its accounts, contacts, opportunities, orders, quotes, and service requests.
- **Dealer Administration.** The Dealer Administration screen lets you do much of the work that you must do to add a new dealer company, such as adding a record for the dealer, assigning user IDs and passwords to dealer users, and approving and registering dealer companies. In this screen you can complete the necessary steps to get a dealer company started, including creating a new organization and putting it in the proper place in the hierarchy. You can also administer dealer information, such as adding or changing information about users, or about the dealer organization.
- **Vehicles.** Provides information about vehicles.
- **Sales History.** Tracks the history of sales to each customer.
- **Service History.** Tracks the history of service to each customer.

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

Siebel eAutomotive and Siebel Partner Manager used by the automotive industry do not include the Role Administration screen of Siebel PRM.

Adding New Dealers

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

- Siebel eDealer does not use Roles.
- Siebel eDealer requires one organization for each dealer store.
- Siebel eDealer does not use Partner Self-Registration.
- Siebel eDealer requires Primary Partner type to be *Dealer*.

Do Not Use Roles

Siebel PRM uses Roles to limit the screens that users see and to create a task list on the home page.

Siebel eDealer does not use roles. You should ignore any discussion in *Siebel Partner Relationship Management Administration Guide* about the task list on the home page and about the use of roles to limit the screens that are visible.

When you add new dealers, ignore the section in the setup chapter of *Siebel Partner Relationship Management Administration Guide* about setting up roles.

Create One Organization for Each Store

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

In Siebel PRM, you or the partners may optionally create suborganizations of this partner organization, to restrict data visibility within the partner company.

In Siebel eDealer, you or the partner company must create a suborganization of this dealer organization representing each of the dealer's stores. For example, if the dealer has 500 showrooms, the dealer organization must have 500 suborganizations, one representing each showroom.

It is necessary to have a separate organization for each store so dealers can use the added features that Siebel eDealer provides to allow dealers to manage their own retail operations.

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

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

Do Not Use Partner Self-Registration

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

This model of partner registration does not apply to the automotive industry. Recruiting a dealer is a long process, which would not be done through applying at a Web site.

For this reason, the section about Registering Individual Partners in the setup chapter of *Siebel Partner Relationship Management Administration Guide* does not apply to Siebel eDealer.

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

- **Display and assess prospective partners.** Begin by displaying the list of prospective partners recruited through the Web and deciding which to approve as partners.
- **Add a Partner record for the partner company.** You typically add a Partner record by approving a prospective partner.

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

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

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

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

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

In summary, you add a new dealer as follows:

- Begin by adding a Dealer record directly in the Approved Dealer view, using the method described in the section about other ways of adding partner records, at the end of the setup chapter of *Siebel Partner Relationship Management Administration Guide*. In the Partner Type field, be sure *Dealer* is selected.

- Click Register to create the dealer organization. This is similar to the process described in the setup chapter of *Siebel Partner Relationship Management Administration Guide*, except that you can choose a parent organization for the new dealer, rather than just being able to choose a parent division.

- After registering, you continue the process of assigning responsibilities, positions, and master data to the dealer company and of adding user assignments at the dealer company, as described in the setup chapter of *Siebel Partner Relationship Management Administration Guide*, except that you should skip the section about roles, and you should use the Dealer Administration screen.

NOTE: After you have finished adding the dealer company, tell the delegated administrator at the dealer company to add one suborganization under the dealer organization representing each store and to associate employees with the suborganizations representing their stores.

NOTE: Vehicles should also be associated with the suborganizations representing stores. This is necessary for the Inventory Search to work properly.

NOTE: When you add a record in the Approved Dealer view, you have not yet created the dealer company. You have just added an Account record with Dealer in the Partner Type field. You create the dealer company when you click Register, creating an Organization record representing the dealer in addition to the Account record.

Sharing Data with Dealers

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

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

- Vehicles
- Sales History
- Service History

The sections that follow provide examples of typical ways you might use these screens to share data with your dealers.

There is also a section about the Dealer Operations screen, which you can use to view all of a dealer's transactional data.

Assigning Vehicles to a Dealer

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

When a vehicle is sold to a customer, its vehicle record should be associated with the contact record for that customer.

You can make a vehicle visible to a dealer in two ways:

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

For more information about working with vehicles, see the section about vehicles in the *Siebel eAutomotive Guide*.

To assign a vehicle to a dealer employee

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

   The Access Team Members dialog box appears.
5. In the Access Team Members dialog box, click New.

6. In the list of employees, select the employee you want to add to the access team and click OK.

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

7. In the Access Team Members dialog box, click OK.

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

To assign a vehicle to a dealer company

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

   The Organizations dialog box appears.

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

   The Organizations dialog box appears, with that organization added to the list.

7. In the Organizations dialog box, click OK.

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

Configuring Vehicles and Options

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

For example, a customer may tell the dealer that the customer wants aluminum wheels as an option. The configuration model that you set up can tell the dealer what aluminum wheels are available for that make of car. When the customer chooses one type of wheel, the configuration model can indicate whether special tires are needed for that type of wheel. It can also suggest that customers who buy that type of wheel may also want dual exhaust.

For more information about using eConfigurator to define products, see *Product Administration Guide*.

Assigning Sales History to a Dealer

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

For more information about sales history, see *Siebel eAutomotive Guide*.

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

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

Assigning Service History to a Dealer

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

For more information about service history, see *Siebel eAutomotive Guide*.

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

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

Viewing Dealer Operations

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

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

- **More Info.** Displays full information about the selected dealer company. Similar to the More Info view in Siebel PRM, except that it does not have an Industries field.
- **All Vehicles.** Lists all vehicles where the dealer organization is the primary organization for the vehicle.
- **Vehicle Inventory.** Lists all available vehicles owned by this dealer. A vehicle is listed here if, in the Vehicle view, the value of the Owned By field is Dealer, the value of the Account field is the dealer organization, and the value of the Status field is Available.

- **Related Vehicles.** Lists all vehicles related to this dealer. A vehicle is listed here if, in the Account > Vehicle view, the vehicle is listed in the Related Vehicle applet for the dealer, with any value for the relationship.
- **Employees.** Lists all employees of this dealer. Employees are listed here if their primary organization is this dealer's organization.
- **Contacts.** Lists all contacts of this dealer. Contacts are listed here if they have this dealer as one of the organizations in the Organization field of the Contact record.
- **Accounts.** Lists all accounts of this dealer. Accounts are listed here if they have this dealer as one of the organizations in the Organization field of the Account record.
- **Opportunities.** Lists all opportunities of this dealer. Opportunities are listed here if they have this dealer as one of the organizations in the Organization field of the Opportunity record.
- **Service Requests.** Lists all service requests of this dealer. Service Requests are listed here if the position of the service request owner belongs to the dealer organization.
- **Quotes.** Lists all quotes of this dealer. Quotes are listed here if they have this dealer as one of the organizations in the Organization field of the Quote record.
- **Order.** Lists all orders of this dealer. Orders are listed here if they have this dealer as one of the organizations in the Organization field of the Order record.
- **Activities.** Lists all activities of this dealer. Activities are listed here if the dealer organization is the primary organization of the activity's primary owner.
- **Makes.** Lists all makes sold by this dealer.
- **Hours.** Lists the hours of this dealer.
- **Sales History.** Lists all sales transactions where the selling dealer was this dealer.
- **Service History.** Lists all services transactions where the servicing dealer was this dealer.

To view dealer operations

1. Navigate to the Dealer Operation screen.

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

Managing Sales, Service, and Marketing

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

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

- **Sales.** Manufacturers share opportunities (leads), accounts, and contacts with Dealers. Dealers work on assigned opportunities and enter information about them. Manufacturers are able to view this information to see what progress the dealer is making on the opportunity.
- **Service.** Manufacturers assign service requests to dealers. Dealers resolve these service requests for the customer on behalf of the manufacturer and enter information about them. Manufacturers are able to view this information to track dealers' work on service requests.
- **Marketing.** Both the scenario for collaborative marketing with your partners and the scenario for marketing to your partners apply to the dealers in the automotive industry.

In addition, Siebel eDealer has a number of features that allow dealers to manage their own sales. These features are illustrated by the following sales scenarios:

- "The Dealer Assigns Contacts to Sales Consultants" on page 27
- "The Dealer Creates and Uses Sales Steps" on page 30
- "The Dealer Sales Consultant Prints Forms" on page 33
- "The Dealer Generates Follow-Up Communications" on page 35
- "The Dealer Creates Sales Budgets and Forecasts" on page 36

The Dealer Assigns Contacts to Sales Consultants

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

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

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

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

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

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

This scenario has the following steps:

- **The dealer receptionist enters information about the customer**
- **The dealer receptionist assigns the customer to a sales consultant**
- **The dealer assigns unassigned opportunities**
- **The dealer sales consultant works with the customer**

The Dealer Receptionist Enters Information about the Customer

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

To enter information about the product

1. The dealer receptionist navigates to the Showroom Log screen.
2. In the Showroom Log list, the receptionist clicks New.
3. In the new record and the More Info form, the receptionist enters information about the customer and the customer's vehicle preference.

The Dealer Receptionist Assigns the Customer to a Sales Consultant

As sales consultants finish other work and become available to work with new customers, the dealer receptionist assigns the new customers to them. The information that was entered in the showroom log has automatically generated an Contact record and an associated Opportunity record.

The receptionist can assign this customer to a sales consultant by choosing the sales consultant in the Employee field.

To assign the customer to a sales consultant

1. The dealer receptionist navigates to the Showroom Log screen.
2. In the Showroom Log list, in the record for the customer, the receptionist clicks the Select button in the Employee field.
3. In the Pick Position dialog box, the receptionist selects the available Sales Consultant and clicks OK.

The Dealer Assigns Unassigned Opportunities

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

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

To assign an unassigned opportunity to a sales consultant

1. The dealer receptionist navigates to the Unassigned Opportunities screen.
2. In the Unassigned Opportunities Log list, the receptionist selects the opportunity of the next customer.
3. The receptionist clicks Assign.
4. In the Pick Position dialog box, the receptionist selects a sales consultant and clicks OK.

The Dealer Sales Consultant Works with the Customer

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

To work with the customer

1. The dealer sales consultant navigates to the Contacts screen, My Contacts view.
2. In the Contacts list, the sales consultant selects the record for this customer, and reads information about this customer in the record and the More Info form.
3. The sales consultant clicks the Opportunity view tab to read more information about this opportunity.
4. The sales consultant selects the Opportunity record.

   The fourth-level navigation appears under the Opportunity form.
5. The sales consultant can use the fourth-level navigation to enter the buyer and cobuyer, to use sales steps, to enter activities, to capture trade-in information, to enter information about the vehicles that were shown to the customer, and to print forms.

The Dealer Creates and Uses Sales Steps

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

Sales consultants will always be able to see which sales steps have already been completed for an opportunity.

This scenario has the following steps:

- **The dealer general manager creates sales steps**
- **The dealer sales consultant uses sales steps**
- **The dealer sales manager tracks sales steps**

The Dealer General Manager Creates Sales Steps

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

To create sales steps

1. The dealer navigates to the Sales Step Administration screen.
2. In the Sales Step Administration list, the dealer clicks New.
3. In the new record, the dealer enters information in the following fields:
   - Name. Enter a name for the sales step, which will be the name that appears the sales consultant's Sales Step list.
   - Order. Enter the order in which this step should appear in the sales consultant's Sales Step list.
   - Active. This check box is selected by default. You can deselect it to deactivate this step, so it does not appear in the sales consultant's Sales step list.
4. The dealer continues to add records with this information until all of the sales steps have been added.

The Dealer Sales Consultant Uses Sales Steps

As dealer sales consultants work on opportunities, they go through these sales steps in order. When they complete each step, they mark that it is completed.

After the sales consultant completes the sales step, an activity is created in the Activities screen, recording the sales step.

Dealer sales consultants use the Contact screen to work with sales steps.

To use sales steps

1. The dealer sales consultant navigates to the Contacts screen.
2. In the Contacts list, the sales consultant selects the customer.
3. The sales consultant clicks the Opportunities view tab.
4. In the Opportunities list, the sales consultants selects the opportunity that is being worked on.
5. Under the Opportunities form, the sales consultant clicks the Sales Steps view tab.

   The Sales Step list appears, with all the steps that were defined in the Sales Step Administration screen.
6. In the record for the sales step that has just been completed, the sales consultant selects the Completed check box.
7. The current date is automatically entered in the Date field, the sales consultant's login name is automatically entered in the Sales Consultant field, and an Activity record is automatically created recording this sales step.

The Dealer Sales Manager Tracks Sales Steps

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

To track sales steps

1. The dealer sales manager navigates to the Activities screen, My Team's Activities view.

2 The sales manager creates a query to display all Activity records that have a sales consultant's login log-in name in the Employee field and Sales Step in the Type field.

   The sales manager can see the sales step that this sales consultant has completed.

The Dealer Sales Consultant Prints Forms

While sales consultants are working on a sale, they can use Siebel eDealer to capture credit information and print forms such as the buyer's worksheet, the trade-in appraisal form, and the credit appraisal form. Once the sale is complete, the sales consultant hand carries these forms to the finance manager, who closes the opportunity.

This scenario has the following steps:

- **The dealer manager creates forms**
- **The dealer sales consultant prints forms**

The Dealer Manager Creates Forms

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

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

The general process is:

- **Create a Proposal Field Mapping Record.** The dealer manager uses the Application Administration screen, Proposal Field Mapping view, to create a mapping that specifies which fields from the Siebel database will be inserted in the Siebel Proposal. This allows the form to be automatically filled out with information about the customer.
- **Create a Form.** The dealer manager uses the Application Administration screen, Forms view, to create the form and to associate it with this mapping. This view is used in the same way as the Proposal Templates view, described in *Applications Administration Guide*. The Form record must have the following values:
  - The Name field must have a name that include a substring identifying the type of form it is. The name must include *WorkSheet* for the Buyer-WorkSheet Form, *TradeIn* for the Trade-In Form, and *CreditApplication* for the Credit Application Form.

- The DefaultFlag field must be checked.
- The file must be attached to the appropriate file system.
- The Mapping field must contain the Mapping record name created in the previous step.

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

The Dealer Sales Consultant Prints Forms

While working on an opportunity, the sales consultant prints out necessary forms. When the forms are ready, the sales consultant hand delivers them to the finance manager, who closes the sale for the customer. The following forms are available:

- **Buyers Worksheet.** Information about the customer that can be carried over to the finance manager for closing the lead.
- **Trade-In Form.** Information to determine the trade-in value of the customer's current car.
- **Credit Application.** Information needed to give the customer credit.

To print forms

1. The dealer sales consultant navigates to the Contacts screen.
2. In the Contacts list, the sales consultant selects the customer.
3. The sales consultant clicks the Opportunities view tab.
4. In the Opportunities list, the sales consultants selects the opportunity that is being worked on.
5. Under the Opportunities form, the sales consultant clicks the Forms view tab.
6. In the Forms list, the sales consultant can click Buyer's Worksheet, Trade-In Form, or Credit Application to create forms of those types.
7. In the Forms list, the sales consultant drills down on the Draft Name of a form.

   The form appears in Microsoft Word document format.
8. The sales consultant uses Microsoft Word to print out the form.

The Dealer Generates Follow-Up Communications

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

- **Lease Expiry Rule.** This rule allows the dealer to contact the customer when a lease is about to expire. The dealer enters the number of days before expiration of the lease when this rule should fire. If the dealer selects the Send Email to Customer check box, the rule sends an email to warn the customer that the lease will expire, unless the customer has specified not to send email. This email is based on a template that is built into Siebel eDealer, and it is personalized with information about the customer. If the dealer selects the Schedule Call for Sales Consultant check box, the rule creates an activity for the primary sales consultant for this customer, to contact the customer about the lease expiration. This rule only fires for opportunities whose sales stage is delivered.
- **No Activity After Sales Stage Rule.** This rule allows the dealer to contact the customer if the customer is not continuing the sales process. If there has been no activity for the specified number of days after an opportunity's sales stage has changed, this rule creates an activity for the sales consultant, with the type No Activity and with a link to the opportunity. The dealer enters the number of days and checks the Notify Sales Consultant check box. This rule does not fire for opportunities whose sales stage is delivered.
- **Vehicle Sales Anniversary Rule.** This rule allows the dealer to contact the customer one year after the car has been delivered. This fires one year after the sales stage one year after the sales stage becomes delivered. If the dealer selects the Send Email to Customer check box, the rule sends an email to the customer which is based on a template that is built into Siebel eDealer and which is personalized with information about the customer. If the dealer selects the Schedule Call for Sales Consultant check box, the rule creates an activity for the primary sales consultant for this customer, to contact the customer.

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

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

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

To generate follow-up communications

1. The dealer navigates to the Employee and Customer Communication Rules Administration screen.
2. From the Show drop-down list, the dealer selects one of the four rule types specified above.
3. The dealer fills out the form as specified above.

The Dealer Creates Sales Budgets and Forecasts

Siebel eDealer allows dealerships to create their yearly sales budgets and monthly sales forecasts. Currently, most dealerships do using paper and whiteboards. Siebel eDealer automates these processes.

The Dealer Creates the Yearly Budget

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

Siebel eDealer automates this consultation process. The sales managers enter their budgets in Siebel eDealer, and the general manager uses these to create the store budget. After the budget has been created, all employees can view it on their Siebel eDealer home page.

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

- **The dealer general manager creates the framework for the budget and forecasts**
- **Dealer sales managers create their Budgets**
- **The dealer general manager creates the store budget**
- **Dealer employees view the store budget**

The Dealer General Manager Creates the Framework for the Budget and Forecasts

First, the general manager of the dealership specifies which months and which employees will be included in the yearly budget and the monthly forecasts for the next year.

The general manager uses the two views of the Budgets and Forecasts Administration screen for the two steps of creating the framework for budget and forecasts:

- **Specify which months are included in the budget and forecasts.** Done using the Store Budget and Forecast Administration view of the Budgets and Forecasts Administration screen.
- **Specify which employees are included in the budget and forecasts.** Done using the Employee Budget and Forecast Administration view of the Budgets and Forecasts Administration screen.

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

NOTE: When new employees are added during the year, the general manager must go back to the Budget screen and Forecast screen to select them and add months for them, if the general manager wants to include them in the budget and forecasts.

To specify which months are included in the budget and forecasts

1. The dealer navigates to the Budget and Forecasts Administration screen.
2. From the Show drop-down list, the dealer chooses Store Budget and Forecast Administration.

   In the Store list, the organization for the dealership appears and is selected.
3. In the Budget and Forecast Administration list, the dealer clicks New.
4. In the Month field of the new record, the dealer clicks the select button.
5. In the Pick Period dialog box, the dealer selects the first month of the year or forecasting period and clicks OK.

   The selected month appears in the new record.
6. The dealer continues to add new months in the same way until all the months of the forecasting period have been added.

NOTE: The dealer only enters the months here. The numbers in the budget and forecast fields will be calculated based on what the sales managers and sales consultants enter as their budget and forecast estimates for each month.

To specify which employees are included in the budget and forecasts

1. The dealer navigates to the Budget and Forecasts Administration screen.
2. From the Show drop-down list, the dealer chooses Employee Budget and Forecast Administration.

   The Employee Forecast and Budget - Store list includes all the store’s employees.
3. In the Employee Forecast and Budget - Store list, the dealer selects the Part of Store (Budget) field and the Part of Store (Forecast) field for the first employee who will be included in the budget and forecasts, to add check marks to these fields.

   The dealer can also select just one of these fields, to include an employee in just the budget or just the forecasts.

4 In the Budget and Forecast Information list, the dealer specifies the months when this employee will be included in the budget and forecasts:

- **a** In the Budget and Forecast Information list, the dealer clicks New.
- **b** In the Month field of the new record, the dealer clicks the select button.
- **c** In the Pick Period dialog box, the dealer selects the first month when this employee will be included in the budget and forecasts and clicks OK.

  The selected month appears in the new record.
- **d** The dealer continues to add new months in the same way until all the months of the forecasting period have been added.

5 The dealer repeats Step 3 and Step 4 for all the employees who will be included in the budget and forecasts.

All employees who will be included in the budget and forecast must have check marks in the Part of Store (Budget) field and the Part of Store (Forecast) fields and must have all the months when they will be included added in the Budget and Forecast information list.

NOTE: The dealer only enters the employees names and their months here. The numbers in the budget and forecast fields will be calculated based on what the sales managers and sales consultants enter as their budget and forecast estimates for each month.

Dealer Sales Managers Create their Budgets

Now that the general manager has created the framework for the budgeting process, the general sales manager tells the sales managers to add their estimated figures for the next year's sales budget.

The sales managers or the employees that they choose to enter the budget go to the Budget screen, Manager's Budget view. The months that the general manager entered are listed there. The sales managers add the figures for each month.

To create the sales manager's budget

1 The dealer sales manager navigates to the Budget screen.

2. From the Show drop-down list, the sales manager chooses Manager's Budget.

   In the Monthly Budget list, there are records for all the months that the general manager entered in the previous step.

3. The sales manager selects a record in the Monthly Budget list and clicks Edit.

4. In the New and Used fields of that record, the sales manager enters an estimate of the sales of the sales manager's reports for that month.

5. The sales manager repeats Step 3 and Step 4 to add an estimate of sales for every month in the budget.

The Dealer General Manager Creates the Store Budget

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

The Budget screen, Store Budget view allows the general manager to look at the total budget for the store for each month, which is the sum of all the sales managers' budgets. The general manager can also use this screen to look at each sales managers' budget for each month.

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

To create the store budget

1. The dealer general manager navigates to the Budget screen.

2. From the Show drop-down list, the general manager chooses Store Budget.

   In the Monthly Budget list, there are records for all the months in the budget, with new and used sales figures that are the sum of all the sales managers' budgets for that month.

3. The general manager selects a record in the Monthly Budget list and scrolls down to view the Sales Managers Budget list, which includes all the sales managers' budgets for that month.

4. If the general manager thinks the sales managers' estimates are not accurate, the general manager adjusts the monthly budget for the store:

- **a** In the Monthly Budget list, the record for that month should already be selected.
- **b** In the Monthly Budget list, the general manager clicks Edit.
- **c** The general manager changes the values in the New and Used fields.

5 The sales manager repeats Step 3 and Step 4 to create a store budget for every month in the budget.

Dealer Employees View the Store Budget

After the process of creating the store budget is complete, all employees automatically see the store budget on their home page when they log in to Siebel eDealer during the budget year. The home page automatically displays the budget information for the current month of the current year.

The Dealer Creates the Monthly Forecast

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

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

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

- Forecasts are done once a month, and budgets are done once a year.
- Forecasts begin with sales consultant forecasts, which are used as the basis of the sales managers' forecasts and the store forecasts. Budgets begin with sales managers' forecasts, which are used as the basis of the store forecast.

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

- **The dealer general manager creates the framework for the budget and forecasts**
- **Dealer sales consultants create their forecasts**
- **Dealer sales managers create their forecasts**

- **The dealer general manager creates the store forecast**
- **Dealer employees view the forecasts**

The Dealer General Manager Creates the Framework for the Budget and Forecasts

First, the general manager of the dealership specifies which months and which employees will be included in the yearly budget and the monthly forecasts for the next year.

This is usually done at the beginning of each year for both budgets and forecasts. It is described in detail in the discussion of creating budgets in "The Dealer General Manager Creates the Framework for the Budget and Forecasts" on page 37.

Dealer Sales Consultants Create their Forecasts

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

To create a sales consultant's forecast

1. The dealer sales consultant navigates to the Forecast screen.
2. From the Show drop-down list, the sales manager chooses My Forecast.

   In the Monthly Forecast list, there are records for all the months that the general manager entered for that employee when the general manager created the framework for budgeting and forecasting.

3. The sales consultant selects the record for the coming month in the Monthly Forecast list and clicks Edit.
4. In the New and Used fields of that record, the sales consultant enters an estimate of sales for that month.

Dealer Sales Managers Create their Forecasts

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

The Forecast screen, Manager's Forecast view allows sales managers to look at their reports' forecasts. The default forecast for the sales manager is the sum of all the reports forecasts. The sales manager can adjust this forecast to set a more realistic forecast for the month.

To create a sales manager's forecast

1. The dealer general manager navigates to the Forecast screen.
2. From the Show drop-down list, the general manager chooses Manager's Forecast.
3. The sales manager selects the record for the coming month in the Monthly Sales Goals list and scrolls down to view the Sales Consultants Forecast list, which includes all the forecasts for that month of all the sales consultants who report to that sales manager.
4. If the sales manager thinks the sales consultants' estimates are not accurate, the sales manager adjusts the monthly forecast:
   a. In the Monthly Forecast list, the record for that month should already be selected.
   b. In the Monthly Forecast list, the general manager clicks Edit.
   c. The sales manager changes the values in the New and Used fields.

The Dealer General Manager Creates the Store Forecast

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

The Forecast screen, Store Forecast view allows the general manager to look at the total forecast for the store for each month, which is the sum of all the sales managers' forecasts. The sales manager can adjust this forecast to set a more realistic forecast for the month.

To create the store forecast

1. The dealer general manager navigates to the Forecast screen.
2. From the Show drop-down list, the general manager chooses Store Forecast.
3. The sales manager selects the record for the coming month in the Monthly Sales Goals list and scrolls down to view the Sales Managers Forecast list, which includes the forecasts for the month of all the sales managers.
4. If the general manager thinks the sales managers' estimates are not accurate, the general manager adjusts the monthly forecast for the store:

- **a** In the Monthly Forecast list, the record for that month should already be selected.
- **b** In the Monthly Forecast list, the general manager clicks Edit.
- **c** The general manager changes the values in the New and Used fields.

Dealer Employees View the Forecast

Sales consultants can view their own forecasts on the Siebel eDealer home page, in the applet My Monthly Sales Goals.

Sales Managers can view the store forecast on the Siebel eDealer home page, in the applet My Monthly Sales Goals.

The home page automatically displays the forecast information for the current month of the current year.

Managing Your Dealers

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

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

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

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

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

Entering Opportunities to Sell to Dealers

When OEMs or dealer groups sell to dealers, they work with opportunities to sell to dealers, just as other companies work with opportunities from their customers. The Dealer Opportunities view is used by OEMs and dealer groups to sell to their dealers.

For more information about working with opportunities, see *Siebel Sales User Guide*.

NOTE: Because dealer opportunities and service requests are used by OEMs selling to dealers, they should be enabled only if Siebel eAutomotive is being used an OEM. They should not be enabled if Siebel eAutomotive is being used by a dealer group.

To enter an opportunity to sell to a dealer

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

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

Viewing a Dealer’s Service Requests

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

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

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

The Dealer Service Requests view displays all service requests from a dealer regardless of whether their status is open or closed.

For more information about working with service requests, see *Siebel Call Center User Guide*.

To view all service requests from a dealer company

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

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

Displaying the Makes a Dealer Sells

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

To enter the makes a dealer sells

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

Displaying a Dealer's Business Hours

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

To enter a dealer's business hours

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

   The Dealer Sales & Service Hours view appears.

5. In the Sales Hours list, click New to add a new record for each day of the week.

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

6. In the Service Hours list, click New to add a new record for each day of the week.

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

Index

E

P

R

S