Siebel Automotive Guide

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1 What's New in This Release

What's New in Siebel Automotive Guide, Version 7.8

Table 1 lists changes described in this version of the documentation to support Version 7.8 of the software.

Table 1. New Product Features in Siebel Automotive Guide, Version 7.8

Topic	Description
Managing Collections See "Managing Collections" on page 51.	Added new chapter describing the collection process.
Administrator Procedures for Collections See "Administering Collection Tasks" on page 53.	Added new topics describing how Siebel administrators manage Collection processes and tasks.
Siebel Automotive Workflows See "Activating Siebel Automotive Workflows" on page 54.	Added new topic describing how administrators activate Siebel Automotive workflows.
Creating and Using Assignment Rules See "Creating Assignment Rules for Collection Assignments" on page 54 and "Using Assignment Rules" on page 56.	Added new topics describing how administrators create and use assignment rules.
Collection Preferences and Collection Correspondence Administration See "Managing Collections Preferences" on page 57 and "Managing Collection Correspondence Administration" on page 60.	Added new topics describing how administrators manage the Collections Preferences and Collection Correspondence Administration screens.
Automating the Cure Process See "Automating the Cure Process" on page 61.	Added new topic describing how administrators automate the cure process.

Table 1. New Product Features in Siebel Automotive Guide, Version 7.8

Topic	Description
End-User Procedures for Collections See “End-User Procedures for Collections” on page 62	Added new topics describing how Siebel end-users (collection agents and managers) perform Collection tasks.
Reviewing Account Summaries See “Reviewing Account Summary and Related Account Information” on page 62	Added new topic describing how end-users review work summary and related-account information.
Reassigning and executing collection records. For more information, see “Managing Collection Reassignments” on page 64 and “Managing Collection Reassignments” on page 64.	Added new topics describing how end-users reassign and execute collection records.
Recording promise-to-pay records. For more information, see “Capturing Promise-to-Pay Records” on page 65.	Added new topic describing how end-users record promise-to-pay records.
Managing the cure process. For more information, see “Managing the Cure Process” on page 67.	Added new topic describing how end-users manage the cure process.
Managing the repossession process. For more information, see “Managing the Repossession Process” on page 67.	Added new topic describing how end-users manage the repossession of a vehicle.
Managing the skip trace and impound service request processes. For more information, see “Managing Skip Trace and Impound Service Requests” on page 70.	Added new topic describing how end-users manage the skip trace and impound service request processes.
Tracking and recording insurance information. For more information, see “Managing Insurance Information” on page 72.	Added new topic describing how end-users track and record insurance information.

2 Siebel Automotive Overview

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

- "About Siebel Automotive" on page 11
- "Product Modules and Options" on page 11

About Siebel Automotive

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

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

Product Modules and Options

Siebel Automotive provides several modules and options, as shown in Table 2.

Table 2. Product Modules and Options

Option	Description
Data Modeling	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.

Table 2. Product Modules and Options

Option	Description
Dealer and Service Center Location	A parameter-driven search allowing identification of the appropriate dealer in response to a service call or sales opportunity.
Legacy Systems Integration	Provides appropriate connections to legacy application databases required to support marketing, sales, and service activities with new or existing Dealer Business Systems.
Lead Sharing and Tracking	Captures sales opportunities that originate from any form of customer contact, associates them with any demographic information already available, and adds to the demographics based on the contact. Routes the opportunity to the appropriate party within the sales channel to provide followup.
Retail Sales Process Automation	Supports the sales team in a vehicle retail sales process from prospecting through opportunity origination and followup to sale closure and followup service.
Customer Loyalty and Service Marketing	Maintains ongoing contact with the retail customer to promote satisfaction, drive service revenues, and understand needs for subsequent vehicle purchases.

3

Associating Vehicles with Accounts

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

- "Accounts Defined" on page 13
- "Scenarios for Working with Automotive Accounts" on page 13
- "Accounts Process Workflow" on page 14
- "Account Setup Using Siebel Automotive" on page 14
- "Process of Using Automotive for Account Management" on page 16
- "Associating a Vehicle with an Account" on page 16
- "Associating a Vehicle with an Account by Relationship" on page 17

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

Accounts Defined

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

Scenarios for Working with Automotive Accounts

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

Vehicle-Owned Scenario

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

"Associating a Vehicle with an Account" on page 16.

Vehicle-Relationship Scenario

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

Related Topic

"Associating a Vehicle with an Account by Relationship" on page 17.

Accounts Process Workflow

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

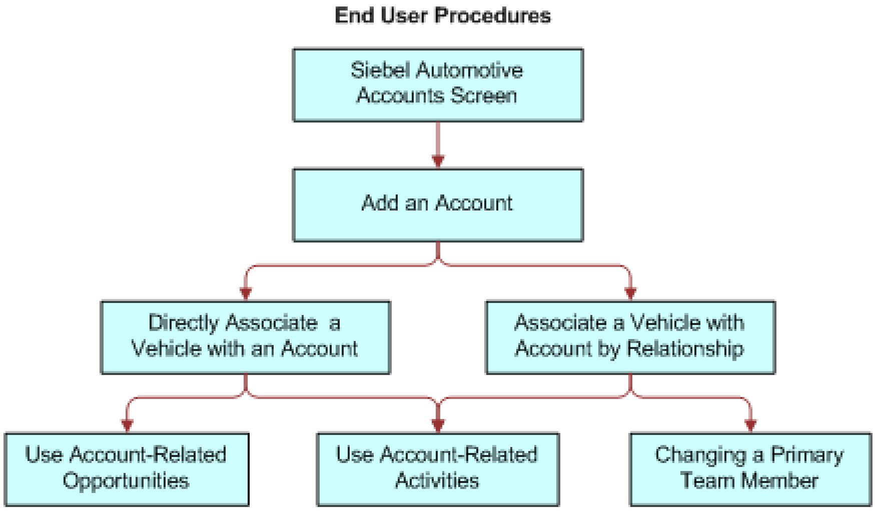
End User Procedures
Siebel Automotive Accounts Screen
Add an Account
Directly Associate a Vehicle with an Account
Associate a Vehicle with Account by Relationship
Use Account-Related Opportunities
Use Account-Related Activities
Changing a Primary Team Member

Figure 1. Accounts Workflow

More Information

For information about multiorganization and position visibility, see *Security Guide for Siebel Business Applications*.

Account Setup Using Siebel Automotive

You 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 are transferred to new account team members during territory reassignments, attrition, and other organizational changes.
Assignment Manager is not being used	You must: ■ 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 do not appear 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 is not available.

About Querying for Abandoned Accounts

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

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

Process of Using Automotive for Account Management

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

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

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

- "Associating a Vehicle with an Account" on page 16
- "Associating a Vehicle with an Account by Relationship" on page 17
- "Associating a Vehicle Using the Summary View" on page 18

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" on page 16.

To associate a vehicle directly with an account

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

Related Topics

- "Associating a Vehicle with an Account by Relationship" on page 17
- "Associating a Vehicle Using the Summary View" on page 18

Associating a Vehicle with an Account by Relationship

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

Table 4. Relationship of Associating a Vehicle With an Account

When...	Then...
A vehicle is associated with an account through the Vehicle Summary screen	The vehicle is associated with the account through the relationship specified in the Vehicle Summary screen.
An account is associated with one or more vehicles that they have not purchased	The vehicle is associated with an account by relationship. For example, the account is the lessor, or provides insurance or financing for the vehicle, but the account does not own the vehicle.

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

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

This task is a step in "Process of Using Automotive for Account Management" on page 16

To associate a vehicle with an account by relationship

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

Related Topics

- "Associating a Vehicle with an Account" on page 16
- "Associating a Vehicle Using the Summary View" on page 18

Associating a Vehicle Using the Summary View

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

This task is a step in "Process of Using Automotive for Account Management" on page 16

To associate a vehicle with an account

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

Related Topics

- "Associating a Vehicle with an Account" on page 16
- "Use this procedure to associate a vehicle with an account by relationship." on page 17

4 Managing Contacts

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

- "Contacts Defined" on page 19
- "Scenario for Working with Automotive Contacts" on page 19
- "Contacts Process Workflow" on page 20
- "Contact Record Relationships" on page 21
- "Process of Using Automotive to Work with Contacts" on page 21
- "Managing Relationships Between Contacts" on page 22
- "Associating a Vehicle with a Contact" on page 22
- "Viewing Service History and Sales History for a Contact" on page 23
- "Managing Service History Information" on page 24

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

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.

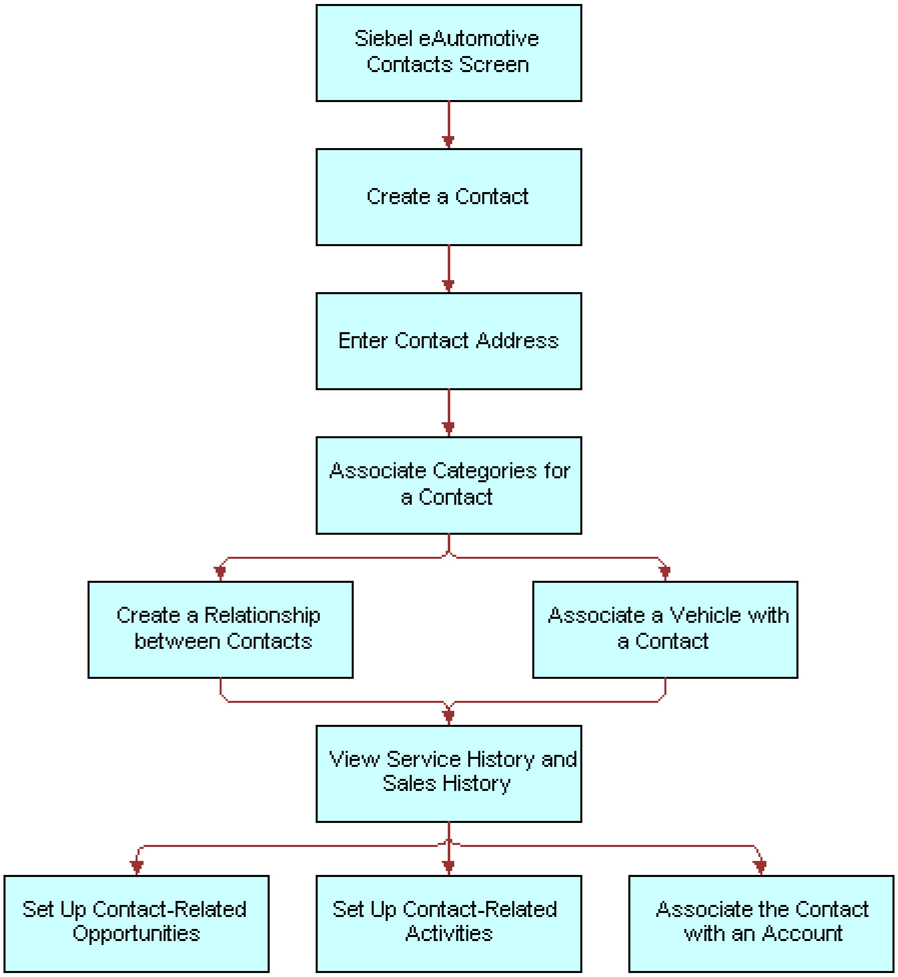
Siebel eAutomotive Contacts Screen
Create a Contact
Enter Contact Address
Associate Categories for a Contact
Create a Relationship between Contacts
Associate a Vehicle with a Contact
View Service History and Sales History
Set Up Contact-Related Opportunities
Set Up Contact-Related Activities
Associate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

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 multiorganization and position visibility, see *Security Guide for Siebel Business 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 the user selects a street address for a contact associated with multiple addresses, a dialog box appears allowing an end user to select one primary address for the contact. An address record may be shared between many contacts or many accounts. As a result, if you modify the address for a contact, it modifies the same address for other contacts and accounts that use this address record.
Households	A contact may be associated with more than one household. When the user selects a household for a contact associated with multiple households, a dialog box appears allowing an end user to select one primary household for the contact.
Contact Method	This field 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, frequently work with contacts in Siebel Automotive. How an end user proceeds depends on whether that user is working with an existing contact or setting up a new one. If the contact exists, the end user may associate it with a household or account in one of several views in the Contacts, Households, or Accounts screens, or the user may not associate it with another object at all.

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

- "Managing Relationships Between Contacts" on page 22
- "Associating a Vehicle with a Contact" on page 22
- "Viewing Service History and Sales History for a Contact" on page 23

Managing Relationships Between Contacts

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

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

This task is a step in "Process of Using Automotive to Work with Contacts" on page 21.

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

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

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

Related Topics

- "Associating a Vehicle with a Contact" on page 22
- "Viewing Service History and Sales History for a Contact" on page 23
- "Managing Service History Information" on page 24

Associating a Vehicle with a Contact

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

This task is a step in "Process of Using Automotive to Work with Contacts" on page 21.

To associate a vehicle with a contact

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

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

Related Topics

- "Managing Relationships Between Contacts" on page 22
- "Viewing Service History and Sales History for a Contact" on page 23
- "Managing Service History Information" on page 24

Viewing Service History and Sales History for a Contact

Use this procedure to display information about the sales for a contact. The Service History tab displays information about the types of services and repairs done on a contact's vehicle.

This task is a step in "Process of Using Automotive to Work with Contacts" on page 21.

To view sales and service history information for a contact

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

To...	Drill down on the...
View sales history	Last Name field link and click the Sales History view tab. **NOTE:** The Sales History view is read-only. For more information on service history, see "Tracking Service History" on page 105.
View service history	Last Name field link and click the Service History view tab. For information on: ■ Entering service history information, see "Managing Service History Information" on page 24. ■ Tracking service history, see "Tracking Service History" on page 105.

Related Topics

- "Managing Relationships Between Contacts" on page 22
- "Associating a Vehicle with a Contact" on page 22
- "Managing Service History Information" on page 24

Managing Service History Information

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

This task is a step in "Process of Using Automotive to Work with Contacts" on page 21.

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

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

For more information on service history, see "Tracking Service History" on page 105.

Related Topics

- "Managing Relationships Between Contacts" on page 22
- "Associating a Vehicle with a Contact" on page 22
- "Viewing Service History and Sales History for a Contact" on page 23

5 Managing Dealers

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

- "About Automotive Dealers" on page 25
- "Scenario for Working with Automotive Dealers" on page 25
- "Dealer Process Workflow" on page 26
- "Process of Using Automotive for Dealer Management" on page 26
- "Establishing Categories" on page 26
- "Defining Dealer Profiles" on page 27
- "Tracking Dealer Sales and Service Information" on page 28

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

About Automotive Dealers

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

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

Dealers are viewed as:

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

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

Scenario for Working with Automotive Dealers

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

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

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

Dealer Process Workflow

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

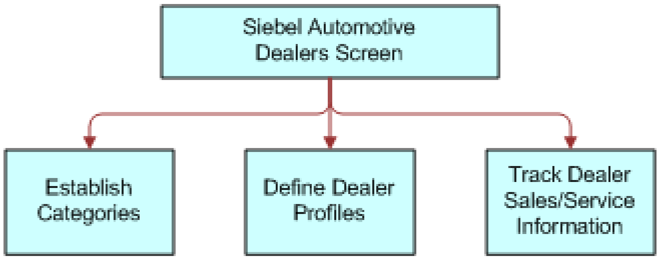
Siebel Automotive Dealers Screen
Establish Categories
Define Dealer Profiles
Track Dealer Sales/Service Information

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. After the administrator has created a record for the dealer, end users can add information on activities, contacts, opportunities, and agreements associated with the dealer.

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

- "Establishing Categories" on page 26
- "Defining Dealer Profiles" on page 27
- "Tracking Dealer Sales and Service Information" on page 28

Establishing Categories

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

This task is a step in "Process of Using Automotive for Dealer Management" on page 26.

To view, edit, create, and delete a category

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

   Some fields are described in the following table.

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

Related Topics

- "Defining Dealer Profiles" on page 27
- "Tracking Dealer Sales and Service Information" on page 28

Defining Dealer Profiles

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

This task is a step in "Process of Using Automotive for Dealer Management" on page 26.

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

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

Related Topics

- "Establishing Categories" on page 26
- "Tracking Dealer Sales and Service Information" on page 28

Tracking Dealer Sales and Service Information

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

This task is a step in "Process of Using Automotive for Dealer Management" on page 26.

This section consists of the following topics:

- "Managing Vehicle Make Information" on page 28
- "Listing Days and Hours for a Dealer" on page 28

Managing Vehicle Make Information

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

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

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

Related Topics

- "Establishing Categories" on page 26
- "Defining Dealer Profiles" on page 27
- "Listing Days and Hours for a Dealer" on page 28

Listing Days and Hours for a Dealer

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

To list days and hours for a dealer

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

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

If...	Then...
You want to specify sales department hours	In the Sales Hours list, for each day of the week that the department is open, perform the following steps: 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, perform the following steps: 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" on page 26
- "Defining Dealer Profiles" on page 27
- "Defining Dealer Profiles" on page 27

6 Managing Lease and Loan Accounts

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

- "Scenario for Working with Lease and Loan Accounts" on page 31
- "Lease and Loan Accounts Process Workflow" on page 33
- "Process of Administering Financial Accounts" on page 33
- "Process of Viewing Asset Finance Information" on page 35
- "Viewing Account Information" on page 36
- "Viewing Contacts" on page 36
- "Viewing Contact Address Information" on page 36
- "Viewing Contracts" on page 37
- "Viewing Vehicles Associated with a Financial Account" on page 38
- "Viewing Manufacturer and Dealer Options" on page 38
- "Viewing Originating Dealer Information" on page 39
- "Viewing Partner and Dealer Employees" on page 39
- "Process of Working with Title Information" on page 39
- "Querying for Delinquent Titles" on page 40

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

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.

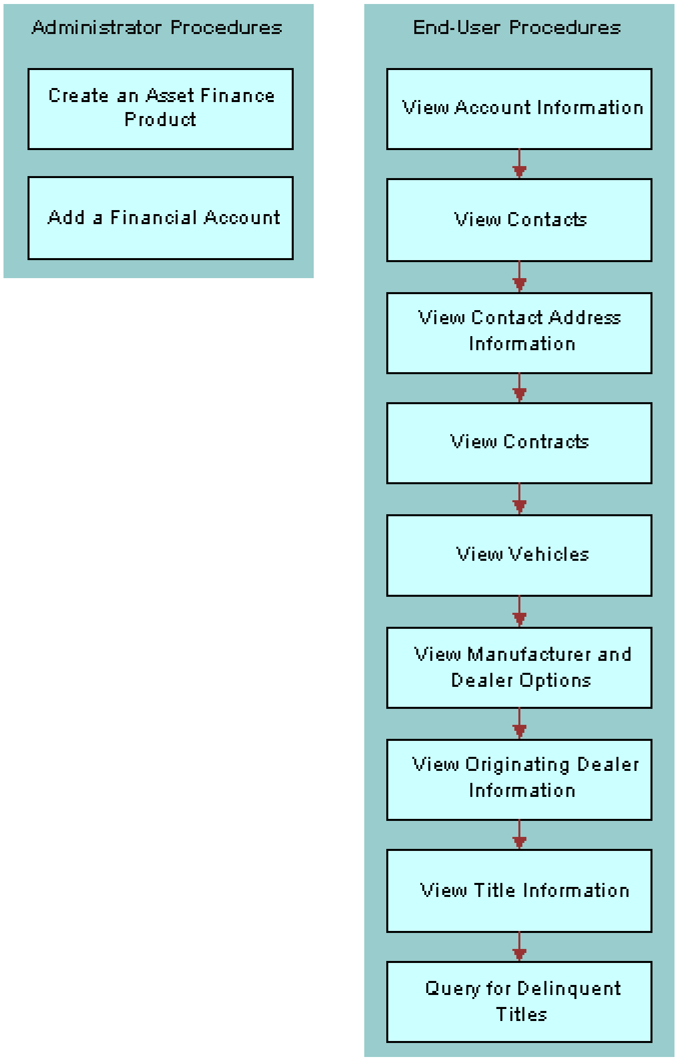
Administrator Procedures
Create an Asset Finance Product
Add a Financial Account
End-User Procedures
View Account Information
View Contacts
View Contact Address Information
View Contracts
View Vehicles
View Manufacturer and Dealer Options
View Originating Dealer Information
View Title Information
Query for Delinquent Titles

Figure 4. Automotive Accounts Sample Tasks

Process of Administering Financial Accounts

To administer financial accounts, perform the following procedures:

- "Creating a Financial Product" on page 34
- "Adding a Financial Account" on page 35

Related Topics

- "About Financial Accounts" on page 34
- "About Adding Financial Accounts" on page 35

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.

This task is a step in "Process of Administering Financial Accounts" on page 33.

To create an asset finance product

1. Navigate to the Administration - Product screen > Products view.
2. Create a new record.

   Complete the fields as necessary.

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

About Adding Financial Accounts

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

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

Adding a Financial Account

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

This task is a step in "Process of Administering Financial Accounts" on page 33.

To add a financial account

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

   Some fields are described in the following table.

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

Process of Viewing Asset Finance Information

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

- "Viewing Account Information" on page 36
- "Viewing Contacts" on page 36
- "Viewing Contact Address Information" on page 36
- "Viewing Contracts" on page 37

- "Viewing Vehicles Associated with a Financial Account" on page 38
- "Viewing Manufacturer and Dealer Options" on page 38
- "Viewing Originating Dealer Information" on page 39
- "Viewing Partner and Dealer Employees" on page 39
- "Process of Working with Title Information" on page 39

Viewing Account Information

Use this procedure to view account information.

This task is a step in "Process of Viewing Asset Finance Information" on page 35.

To view account information

1. Navigate to the Financial Accounts screen > Financial Account List view.
2. Drill down on the Account # field link for a selected account record.

   To see more information, click the More Info view tab.

Viewing Contacts

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

This task is a step in "Process of Viewing Asset Finance Information" on page 35.

To view contacts associated with a financial account

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

Viewing Contact Address Information

Use this procedure to view contact address information.

This task is a step in "Process of Viewing Asset Finance Information" on page 35.

To view address information for an account

1. Navigate to the Financial Accounts screen > Financial Account List view.
2. Drill down on the Account # field link for a selected account record.

3 Click the Addresses view tab.

Viewing Contracts

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

This task is a step in "Process of Viewing Asset Finance Information" on page 35.

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 view.

2 Drill down on the Account # field link for a selected account record.

3 Click the Agreements view tab.

Viewing Vehicle Itemized Costs

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

To view a vehicle's itemization detail

1 Navigate to the Agreements screen > Agreements List view.

2 Drill down on a Name field link for a selected agreement record.

3 Click the Line Items view tab.

4 Select a line item record, and click the Vehicle Costs Itemization subview tab.

Viewing Lease and Loan Details

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

To view lease/loan details for an agreement

1 Navigate to the Agreements screen > Agreements List view.

2 Drill down on a Name field link for a selected agreement record.

3 Click the Lease/Loan Details view tab.

Associating a Financial Account with a Lease or Loan Agreement

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

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

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

Viewing Vehicles Associated with a Financial Account

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

This task is a step in "Process of Viewing Asset Finance Information" on page 35.

To view vehicles associated with a financial account

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

Viewing Manufacturer and Dealer Options

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

This task is a step in "Process of Viewing Asset Finance Information" on page 35.

To view manufacturer and dealer options with a vehicle

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

Viewing Originating Dealer Information

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

This task is a step in "Process of Viewing Asset Finance Information" on page 35.

To view originating dealer information

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

Viewing Partner and Dealer Employees

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

This task is a step in "Process of Viewing Asset Finance Information" on page 35.

To view partner and dealer employees

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

Process of Working with Title Information

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

- "Viewing Title Information" on page 39
- "Viewing Title Detail Information for a Vehicle" on page 40
- "Querying for Delinquent Titles" on page 40

Viewing Title Information

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

This task is a step in "Process of Working with Title Information" on page 39.

To view title information associated with a financial account

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

Viewing Title Detail Information for a Vehicle

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

This task is a step in "Process of Working with Title Information" on page 39.

To view title detail information for a vehicle

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

Querying for Delinquent Titles

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

This task is a step in "Process of Working with Title Information" on page 39.

To query for delinquent titles

1. Navigate to the Financial Accounts screen > Delinquent Title List view.

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

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

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

7

Managing Lease End and Remarketing Activities

This chapter provides information about standard Siebel Automotive functionality for managing the activities when leases end and remarketing the vehicle. It consists of the following topics:

- "Process Workflow for Managing Lease End and Vehicle Remarketing" on page 44
- "Scenario for Managing Lease End and Vehicle Remarketing" on page 44
- "Process of Managing Lease End and Vehicle Remarketing" on page 45
- "Managing Inspection Information" on page 45
- "Managing Vehicle Turn In" on page 47
- "Setting Up the Fair Market Values (FMV)" on page 47
- "Viewing Fair Market Value and Auction Information" on page 48
- "Viewing Fair Market Information" on page 48
- "Viewing Fair Market Value Detail Information" on page 48
- "Remarketing a Vehicle" on page 49

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

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.

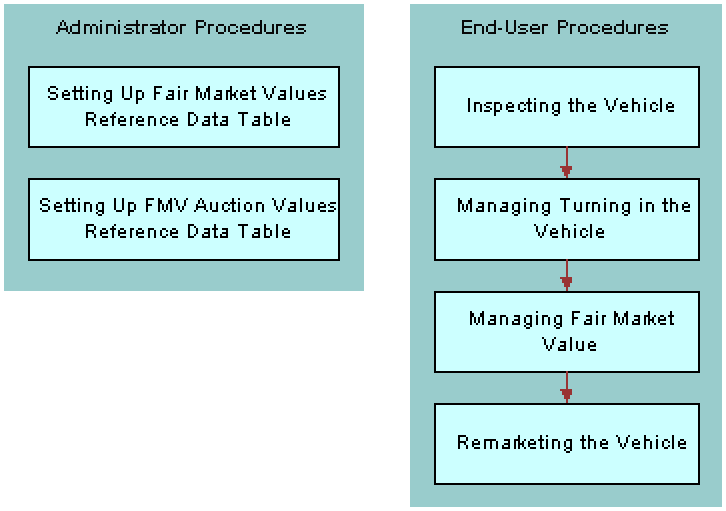
Administrator Procedures
Setting Up Fair Market Values Reference Data Table
Setting Up FMV Auction Values Reference Data Table
End-User Procedures
Inspecting the Vehicle
Managing Turning in the Vehicle
Managing Fair Market Value
Remarketing the Vehicle

Figure 5. Automotive Lease End and Remarketing Sample Tasks

Scenario for Managing Lease End and Vehicle Remarketing

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

- Administrative Scenario
- Call Center Agent Scenario

Administrative Scenario

An administrator who is managing a lease end sets up a table to store the fair market values (FMV) of vehicle products (typically of vehicle products that do not have enough auction data points) to facilitate Fair Market Value calculations.

For more information about administrator-related tasks for managing a lease end, see "Setting Up the Fair Market Values (FMV)" on page 47.

Call Center Agent Scenario

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 pays 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 procedures that follow describe sample tasks that administrators and end users typically perform when managing a lease end and remarketing a vehicle.

Administrator Procedures

To set up the Fair Market Values (FMV) and FMV Auction Values reference data tables, administrators perform the following tasks:

"Setting Up the Fair Market Values (FMV)" on page 47

"Setting Up the FMV Auction Values" on page 48

End-User Procedures

To manage lead end and vehicle remarketing, end users perform the following tasks:

1. "Managing Inspection Information" on page 45
2. "Managing Vehicle Turn In" on page 47
3. "Viewing Fair Market Information" on page 48
4. "Viewing Fair Market Value and Auction Information" on page 48
5. "Remarketing a Vehicle" on page 49

Managing Inspection Information

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

This task is a step in "Process Workflow for Managing Lease End and Vehicle Remarketing" on page 44.

Viewing Inspection Information

End users follow this procedure to view inspection information.

To view inspection information

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

Viewing Body Assessment Information

End users follow 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 view.
2. Drill down on the Account # field link for a selected account record.
3. Click the Asset Inspection view tab.
4. Select a record and scroll down to the Body Assessment applet.
5. In the Body Assessment form list, add, edit, or delete records.

Viewing Excess Mileage Information

End users follow 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 view.
2. Drill down on the Account # field link for a selected account record.
3. Click the Asset Inspection view tab.
4. Select a record and scroll down to the Excess Usage applet.
5. In the Excess Usage form, add, edit, or delete records.

Viewing Parts and Other Charges

End users follow 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 view.
2. Drill down on the Account # field link for a selected account record.
3. Click the Asset Inspection view tab.

4 Select a record and scroll down to the Parts and Other Changes applet.

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 view.
2. Select the records in the list for which the user wants to order an inspection.
3. In the Pick An Inspection Company and Type form, select an inspection company and inspection type.
4. In the Vehicle Batch Order Inspection List view, click Schedule Inspection.

Managing Vehicle Turn In

End users follow this procedure for scheduling turning in of the vehicle when the lease ends.

This task is a step in "Process Workflow for Managing Lease End and Vehicle Remarketing" on page 44.

To manage vehicle turn in

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

Setting Up the Fair Market Values (FMV)

Use this table to store the fair market values (FMV) of vehicle products (typically of vehicle products that do not have enough auction data points) to facilitate Fair Market Value calculations. Administrators typically perform these tasks when managing a lease end and remarking a vehicle.

This task is a step in "Process Workflow for Managing Lease End and Vehicle Remarketing" on page 44

To set up the fair market values reference data table

1. Navigate to the Administration - Application screen > Fair Market Values Reference Data view.
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.

This task is a step in "Process Workflow for Managing Lease End and Vehicle Remarketing" on page 44

To set up the auction values reference data table

1. Navigate to the Administration - Application screen > FMV Auction Values Reference Data.
2. In the FMV Auction Values Reference Data list, view, edit, create, and delete records.

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 pays the fair market value of the vehicle when purchasing it back.

For information on setting up the FMV Fair Market Values Reference table and the FMV Auction Values Reference Data table, see "Setting Up the Fair Market Values (FMV)" on page 47.

This task is a step in "Process Workflow for Managing Lease End and Vehicle Remarketing" on page 44

Viewing Fair Market Information

End users follow 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 view.
2. Drill down on the Account # field link for a selected account record.
3. Click the Fair Market Value view tab.
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

End users follow 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 view.
2. Drill down on the Account # field link for a selected account record.
3. Click the Fair Market Value view tab.

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

End users follow this procedure to view auction value information.

To view auction value information

1. Navigate to the Financial Accounts screen > Financial Account List view.
2. Drill down on the Account # field link for a selected account record.
3. Click the Fair Market Value view tab.
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

End users follow 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 view.
2. Drill down on the Account # field link for a selected account record.
3. Click the Fair Market Value view tab.
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.

Remarketing a Vehicle

End users perform these tasks as a part of the process of managing a lease end for the customer.

This task is a step in "Process Workflow for Managing Lease End and Vehicle Remarketing" on page 44

Viewing Remarketing Details for a Vehicle

End users follow 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 the Account # field link for a selected account record.
3. Click the Consignment Management view tab.
4. In the Consignment Management form, add, edit, or delete records.

Viewing Consignment Status

End users follow 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 view.
2. Drill down on the Account # field link for a selected account record.
3. Click the Consignment Management view tab.
4. Scroll down to Consignment Status.
5. In the Consignment Status list, add, edit, or delete records.

Viewing Sale Charge Details

End users follow 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 view.
2. Drill down on the Account # field link for a selected account record.
3. Click the Consignment Management view tab.
4. Scroll down to Sale Charge Details.
5. In the Sales Charge Details list, add, edit, or delete records.

8 Managing Collections

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

- "About Collections" on page 51
- "Scenario for Collections" on page 52
- "Administering Collection Tasks" on page 53
- "End-User Procedures for Collections" on page 62

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

About Collections

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

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

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

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

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

Figure 6 describes the typical administrator and end-user procedures for Collection Management. The administrator first sets up the collection task, then generates a campaign list, and finally sets up a workflow. End-user procedures include the following: the end user researches delinquent accounts, then executes a collection task, and finally manages skip trace and impound service requests.

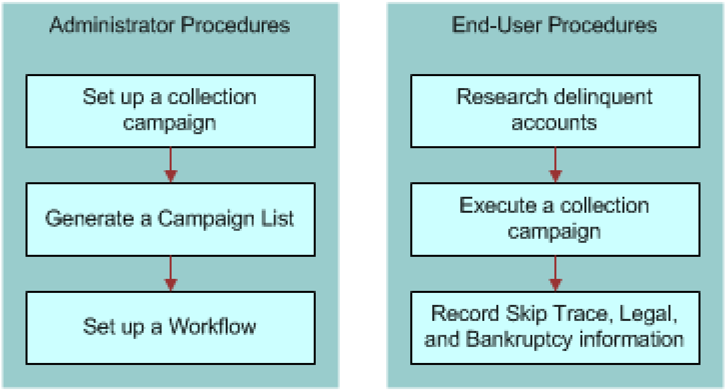
Administrator Procedures
Set up a collection campaign
Generate a Campaign List
Set up a Workflow
End-User Procedures
Research delinquent accounts
Execute a collection campaign
Record Skip Trace, Legal, and Bankruptcy information

Figure 6. Typical Administrator and End-User Procedures for Collections

Scenario for Collections

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

Siebel Administrator Checks for Delinquent Accounts

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

Bank Collection Agent Contacts Customers

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

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

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

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

End users are collection agents. They enter information to:

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

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

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

Administering Collection Tasks

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

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

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

The following administrator procedures are described in this section:

- “Activating Siebel Automotive Workflows” on page 54
- “Creating Assignment Rules for Collection Assignments” on page 54
- “Using Assignment Rules” on page 56
- “Managing Collections Preferences” on page 57
- “Managing Collection Correspondence Administration” on page 60
- “Automating the Cure Process” on page 61

Activating Siebel Automotive Workflows

You can save time and reduce keystrokes by using workflows to automate steps that are repeatedly performed by end users. For more information, see the *Siebel Business Process Designer Administration Guide for Financial Services*.

Table 6 describes the workflow types, that is repossession, promise-to-pay, cure process, skip trace, and impound, you can enable for the Siebel Automotive application. Administrators activate the workflows from the Administration - Business Process > Workflow Deployment view.

Table 6. Activating Siebel Automotive Workflows

Process Name	Repossession	PTP	Cure	Skip Trace	Impound
Auto CF Collection - Update Cure Status			YES		
Auto CF Collection - Calculate DueDate Process		YES	YES		
Auto CF Collection - Update PTP Broken Flag Process		YES			
Auto CF Collection - Update PTP Data Process		YES			
Auto CF Repossession Approval Request Process	YES				
Auto CF Repossession Approved Process	YES				
Auto CF Repossession Denied Process	YES				
Auto CF Repossession Package Sent Process	YES				
Auto CF Skip Impound Activity Process				YES	YES
Auto CF Update Follow-up Date Process	YES	YES	YES		

Creating Assignment Rules for Collection Assignments

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

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

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

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

To add assignment rules

1. Navigate to Administration - Assignment > Territories view.
2. To add a territory, in the Territories list, click New and complete the necessary fields.

   Some fields are described in the table that follow.

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

3. To associate criteria to the rule, in the Criteria list, select New and complete the necessary fields.

   Some fields are described in the table that follow.

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

4 To associate values to the past due rule, in the Values list, click New and complete the necessary fields.

Some fields are described in the table that follow.

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

5 To associate positions to the rule, in the Positions list, click New.

6 In the Add Positions dialog box, select the employee you want to associate with the past due rule.

To view assignment rules

1 Navigate to Administration - Collections > Collections Assignment view.

2 In the Collections Assignments list, click Query.

3 In the Assignment field, query for the Territory name you previously created. For example, Rule1_AutoCF

4 If the record is present, your assignment rule is created.

You can modify the assignment rules at this time.

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

Using Assignment Rules

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

To release assignment rules

1 Navigate to Administration - Collections > Collections Assignments view.

2 In the Collections Assignments list, click Query.

3 In the Assignment field, query for the Territory name you want to use. For example, Rule1_AutoCF.

4. Click the Release button on the Collections Assignments applet

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

To assign accounts according to active assignment rules

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

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

   ```
   AsgnObjName="Financial Account", ObjWhereClause="where ASSET_NUM LIKE '<ACCOUNT
   NAME>'"
   ```

   `where the <ACCOUNT NAME> is the name of the financial account.`

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

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

   ```
   Account", ObjWhereClause="where ASSET_NUM LIKE 'Collections%'"
   ```

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

To verify that the financial accounts are assigned

1. Navigate to Administration - Collections > Collections Reassignment view.
2. In the Employee list, Position field query to find the position.

   For example, Managing Collections - Managing Collections Preferences

3. Verify the First Name and Last Name field.

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

Managing Collections Preferences

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

Table 7 describes the types of information, that is Preferences, PTP Follow-Up, PTP Excluded Dates, and Activity Follow-Up, that appears in the Collection Summary view.

Table 7. Collection Preferences View

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

To set up a promise-to-pay tolerance amount

1. Navigate to the Administration - Collections > Collections Preferences view.
2. In the Preferences form, complete the necessary fields.

   Some fields are described in the following table.

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

Field	Comments
Wait before follow up	Repossession For example 2
Replace existing position	Manual Assignment Preferences Checked

To view system preferences for the Collections processes

1. Navigate to Application - Administration > System Preferences view.
2. In the System Preferences list, query for *CF*.

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

System Preference Name	System Preference Value
CF_CURE_DURATION	10
CF_CURE_TOLERANCE_DAYS	55
CF_PTP_FUTURE_DAYS_MAX	10
CF_PTP_NOT_SATURDAY	Y
CF_PTP_NOT_SUNDAY	Y
CF_PTP_NOT_TODAY	Y
CF_PTP_TOLERANCE_AMNT	1.00
CF_REPLACE_EXIST_POS	Y
CF_REPO_FOLLOW_UP	2

To set up PTP excluded dates

1. Navigate to the Administration - Collections > Collections Preferences view.
2. In the PTP Excluded Dates list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Example
Name	Christmas
Excluded Date	12/25/05

To set up a promise to pay followup definition

1. Navigate to the Administration - Collections > Collections Preferences view.

2 In the PTP Follow-Up list, create a new record and complete the necessary fields.

Some fields are described in the following table.

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

To set up an activity followup definition

1 Navigate to the Administration - Collections > Collections Preferences view.

2 In the Activity Follow-Up list, create a new record and complete the necessary fields.

Some fields are described in the following table.

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

Managing Collection Correspondence Administration

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

To set up correspondence rules

1 Navigate to Administration - Collections > Correspondence Administration view.

2 In the Correspondence list, click New and complete the necessary fields.

Some fields are described in the following table.

Fields	Example
Name	CA_Rule1
State	CA
Type of Letter	Cure
Asset Finance	Select any value from the pop up applet
Cure Length	15

Fields	Example
Cure Comments	Letter sent only once
Bankruptcy	Active
Recipient	Holder
Template	Template for Cure

Automating the Cure Process

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

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

To add correspondence templates

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

To associate correspondence templates to rules

1. Navigate to Administration - Collections > Correspondence Administration view.
2. Query for the rule that you want to associate the template with, for example Auto_CF*.
3. Select the record, in the Template field, click the multiple select button to select the correspondence template.
4. Repeat Step 2 and Step 3 for each correspondence template you want to associate to a rule.

End-User Procedures for Collections

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

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

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

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

- "Reviewing Account Summary and Related Account Information" on page 62
- "Managing Collection Reassignments" on page 64
- "Executing Collection Tasks" on page 64
- "Capturing Promise-to-Pay Records" on page 65
- "Managing the Cure Process" on page 67
- "Managing the Repossession Process" on page 67
- "Managing Skip Trace and Impound Service Requests" on page 70
- "Managing Insurance Information" on page 72

Reviewing Account Summary and Related Account Information

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

To view work summaries

1. Navigate to the Financial Accounts > Work Summary view.

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

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

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

To view manager work summaries

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

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

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

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

To view related accounts

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

Managing Collection Reassignments

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

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

To reassign a financial account

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

Executing Collection Tasks

After agents have reviewed background information about a financial account, they can start the collection tasks by calling the customer. For more information on viewing collection summaries, see "Reviewing Account Summary and Related Account Information" on page 62 and "Managing Collection Reassignments" on page 64.

To view delinquent accounts

- Navigate to the Financial Account > Delinquent Title List view.

To execute collection tasks

1. Navigate to the Financial Accounts > Financial Accounts list view.
2. Drill down on the Account # field link, and then click the Collection view tab.
3. In the Activities list, create an activity record to record the customer's response to the collection call.

4 If the customer makes a payment promise, enter this information.

For more information about capturing a promise to pay, see the "Capturing Promise-to-Pay Records" on page 65 section.

Capturing Promise-to-Pay Records

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

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

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

To record call activities

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

   Some fields are described in the table that follows.

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

To record a promise to pay

1. Navigate to the Financial Accounts > Financial Account List view.
2. Drill down the Account # field link, and then click the Collection view tab.
3. In the Collection Summary list, click New and complete the necessary fields.

   Some fields are described in the table that follows.

4 Verify that a new activity record is created in the Activities list applet on saving the PTP record in the Collection Summary applet. The fields for this are automatically created activity as described in the following table.

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

5 To record multiple promise-to-pay records, repeat Step 3 and Step 4 for each record.

To capture a transaction for promise-to-pay records

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

2 Drill down on the Account # field link, and then click the Transaction Detail view tab.

3 Click New, and then complete the necessary fields.

Some fields are described in the following table.

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

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

To view an account’s promises summary information

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

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

Managing the Cure Process

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

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

To generate the cure process

1. Navigate to the Financial Accounts > Financial Account List view.
2. Drill down on the Account # field link for the selected record.
3. Click the Collection view tab, and then click the Correspondence link.
4. In the Correspondence list, select the record and click Generate Cure Letter.

   Letter gets generated and a record gets created in the Correspondence.

To generate notice of sale letter

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

Managing the Repossession Process

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

Figure 7 describes a typical workflow for the repossession process. The collection agent determines if the repossession should happen. If yes, they create a service request, which gets assigned to the approver or the collection agent's manager. The manager then approves or rejects the repossession request. If the manager approves the request for repossession, an activity gets created by the system and then the collection agent sends a package to the repossession agency.

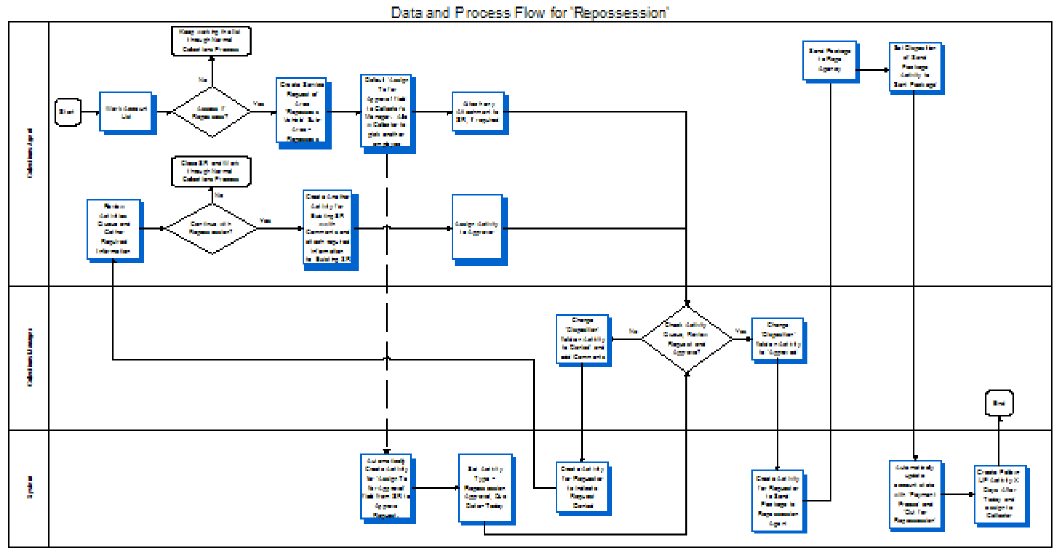

Figure 7. Workflow for the Repossession Process

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

To add repossession partners

1. Navigate to the Partners > Partner List view.
2. In the My Partners list, click new and complete the necessary fields.
3. To verify that the partner was added, navigate to Repossession > Repossession Agencies view, and in the My Agencies list, query for the Repossession partner created in Step 2.

To add an agency employee

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

To add repossession SRs

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

   Some fields are described in the following table.

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

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

To create another activity to continue repossession for the SR

1. Navigate to the Service Request > Service Requests List view.
2. Drill down on the SR # field link, and then click the Repossess Vehicle view tab.
3. In the Activities list, query for Sub-Type: Rep Denied and Type: Request for Repossession.
4. Click New, and complete the necessary fields.

   Some fields are described in the following table.

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

To record details about the repossession service request

1. Navigate to the Service Request > Service Requests List view.
2. In the My Service Request list, query for the SR #, account, summary that you want to approve.

   For example, in the Summary field query for *Rep* to find accounts that have been repossessed.

3. Drill down on the SR # field link, and then click the Repossess Vehicle view tab.
4. In the Activities list, in the Type field query for type of detail you want to record.
5. To approve, in the Sub-Type field, select Repossession Approved.
6. To deny the Approval Request, change Sub-Type field to Denied.
7. To send a package, the Sub-Type field, select Package Sent.

To complete repossession process

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

   Some fields are described in the following table.

Field	Example
Repossession Fee	$2902
Repossessed Date	Current date

Managing Skip Trace and Impound Service Requests

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

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

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

- **Impound.** Occasionally an government agency seizes a vehicle for various reasons, for example if a vehicle is used for illegal purposes. At other times a customer may abandon a vehicle somewhere or not pick up a vehicle from a repair shop. During this time, the government agencies or repair shop informs the finance company (legal owner of vehicle when a vehicle is leased) and the finance company then manages the process of securing the vehicle.

- **Bankruptcy.** If a customer files for bankruptcy, end users can use the Bankruptcy view tab to track bankruptcy information.
- **Legal.** If a customer account becomes delinquent, end users can use the Legal view tab to track information about delinquent accounts.

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

- **Referral to an outside collections agency.** For more information, see the procedure on how to assign a service request to a outside partner that follows.
- **Initiation of skip trace activities.** An example of a skip trace activity is trying to locate a debtor who cannot be reached through existing contact information. For more information, see the procedure on record skip trace information that follows.
- **Processing impound notifications.** Often impound notifications arise when physical possession of a vehicle against which collections activities are in process, for example abandonment at a repair facility or impound by police. For more information about impound service requests, see the procedure on how to add impound service requests that follows.
- **Repossession of the vehicle from the debtor.** For more information about repossessing vehicles, see "Managing the Repossession Process" on page 67.

To record skip trace information

1. Navigate to the Financial Accounts > Financial Accounts List view.
2. In the Financial Accounts list, query to find the account you want to record skip trace information.
3. Drill down on the Account # field link, and then click the Collection view tab > Skip Trace SRs link.
4. In the Skip Trace list, click New and complete the necessary fields.

To record impound information

1. Navigate to the Financial Accounts > Financial Accounts List view.
2. In the Financial Accounts list, query to find the account you want to record skip trace information.
3. Drill down on the Account # field link, and then click the Collection view tab > Impound SRs link.

4 In the Impound SR list, click New and complete the necessary fields.

Some fields are described in the table that follows.

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

5 To enter vehicle information, drill down on the SR # field link.

6 In the Auto CF Impound Vehicle Request form, complete the necessary fields.

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

To record legal information related to a delinquent account

1 Navigate to the Financial Accounts > Financial Accounts List view.

2 In the Financial Accounts list, drill down on the Account # field link you want to view.

3 Click the Legal view tab.

4 In the Legal form, complete the necessary fields.

Managing Insurance Information

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

To associate insurance policies with financial accounts

1 Navigate to the Financial Accounts > Financial Accounts List view.

2 In the Financial Accounts list, drill down on the Account # field link you want to view.

3 Click the Collection view tab, and then click the Insurance link.

4 In the Insurance list, create a new record and complete the necessary fields.

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

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

To add insurance contact information to financial accounts

1 Navigate to the Financial Accounts > Financial Accounts List view.

2 Select the financial account you which you add insurance contact information to.

3 In the Financial Accounts form, click New and complete the necessary fields.

9 Managing Vehicles

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

- "Vehicles in Siebel Automotive" on page 75
- "Scenario for Working with Vehicles" on page 75
- "Vehicles Process Workflow" on page 76
- "Entering Vehicle Records" on page 76
- "Process of Managing Vehicle Records" on page 77
- "Editing a Vehicle Record" on page 77
- "Changing Vehicle Status" on page 77
- "Deleting a Vehicle" on page 78
- "Updating Vehicle Service History" on page 78
- "Managing Vehicle Financial Details" on page 79

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

Vehicles in Siebel Automotive

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

Scenario for Working with Vehicles

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

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

NOTE: The VIN is unique for each vehicle.

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

Vehicles Process Workflow

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

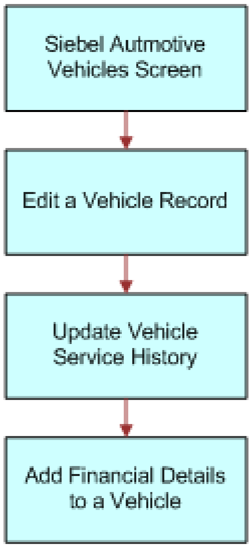
Siebel Autmotive Vehicles Screen
Edit a Vehicle Record
Update Vehicle Service History
Add Financial Details to a Vehicle

Figure 8. 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 multiorganization and position visibility, see *Security Guide for Siebel Business Applications*.

Entering Vehicle Records

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

To view, edit, create, and delete a vehicle

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

Process of Managing Vehicle Records

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

- "Editing a Vehicle Record" on page 77
- "Changing Vehicle Status" on page 77
- "Deleting a Vehicle" on page 78
- "Updating Vehicle Service History" on page 78
- "Managing Vehicle Financial Details" on page 79

Editing a Vehicle Record

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

This task is a step in "Process of Managing Vehicle Records" on page 77.

To edit a vehicle record

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

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

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

Related Topics

- "Changing Vehicle Status" on page 77
- "Deleting a Vehicle" on page 78
- "Updating Vehicle Service History" on page 78
- "Managing Vehicle Financial Details" on page 79

Changing Vehicle Status

Use this procedure to change the status of a vehicle from Allocated to Available using the Vehicle Administration screen. This view should not ordinarily be used; it exists only to correct errors when a vehicle has been removed from a quote, but its Status field is still Allocated.

This task is a step in "Process of Managing Vehicle Records" on page 77.

For more information about vehicle allocation, see "Allocating Vehicles to a Quote" on page 97.

To change the status of a vehicle

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

Related Topics

- "Editing a Vehicle Record" on page 77
- "Deleting a Vehicle" on page 78
- "Updating Vehicle Service History" on page 78
- "Managing Vehicle Financial Details" on page 79

Deleting a Vehicle

Use this procedure to delete a vehicle.

This task is a step in "Process of Managing Vehicle Records" on page 77.

To delete a vehicle

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

Related Topics

- "Editing a Vehicle Record" on page 77
- "Changing Vehicle Status" on page 77
- "Updating Vehicle Service History" on page 78
- "Managing Vehicle Financial Details" on page 79

Updating Vehicle Service History

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

This task is a step in "Process of Managing Vehicle Records" on page 77.

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

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

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

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

Related Topics

- "Editing a Vehicle Record" on page 77
- "Changing Vehicle Status" on page 77
- "Deleting a Vehicle" on page 78
- "Managing Vehicle Financial Details" on page 79

Managing Vehicle Financial Details

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

This task is a step in "Process of Managing Vehicle Records" on page 77.

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

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

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

Related Topics

- "Editing a Vehicle Record" on page 77
- "Changing Vehicle Status" on page 77
- "Deleting a Vehicle" on page 78
- "Updating Vehicle Service History" on page 78

10 Managing Products

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

- "Types of Products" on page 81
- "About the List of Valid Vehicle Options" on page 81
- "Scenario for Working with Automotive Products" on page 82
- "Products Process Workflow" on page 83
- "Process of Managing Products" on page 83
- "Managing a Product's Information" on page 83
- "Associating Valid Options with a Product" on page 84
- "Adding Product Features and Specifications" on page 85
- "Working with Product Features" on page 85
- "Associating a Feature with a Product" on page 85
- "Working with Product Specifications" on page 86
- "Associating a Specification with a Product" on page 86

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

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

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 9 illustrates the administrator workflow for working with products.

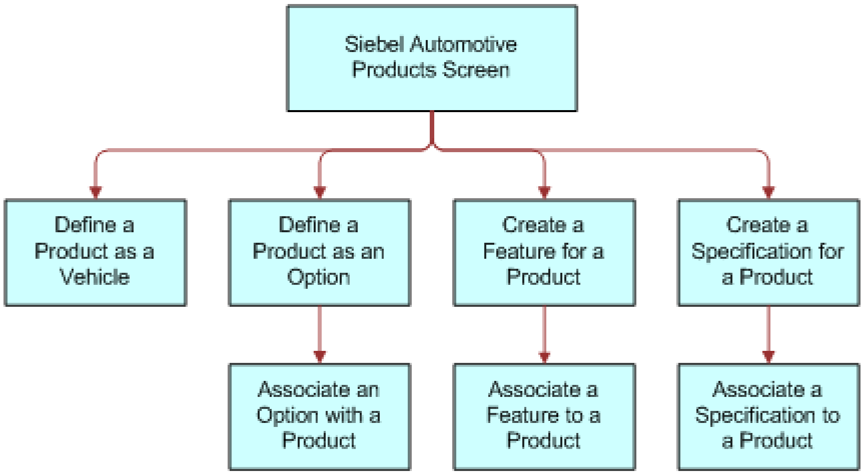
Siebel Automotive Products Screen
Define a Product as a Vehicle
Define a Product as an Option
Create a Feature for a Product
Create a Specification for a Product
Associate an Option with a Product
Associate a Feature to a Product
Associate a Specification to a Product

Figure 9. Products Workflow

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

Process of Managing Products

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

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

- "Managing a Product's Information" on page 83.
- "Associating Valid Options with a Product" on page 84.
- "Adding Product Features and Specifications" on page 85.

Managing a Product's Information

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

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

This task is a step in "Process of Managing Products" on page 83.

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

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

Related Topics

- "Associating Valid Options with a Product" on page 84
- "Adding Product Features and Specifications" on page 85

Associating Valid Options with a Product

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

This task is a step in "Process of Managing Products" on page 83.

Related Topics

- "Managing a Product's Information" on page 83
- "Adding Product Features and Specifications" on page 85

Defining a Product as an Option

Use this procedure to define a product as an option.

This task is a step in "Associating Valid Options with a Product" on page 84.

To define a product as an option

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

Related Topic

- "Associating an Option with a Product of Type=Vehicle" on page 84

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 "Associating Valid Options with a Product" on page 84.

To associate an option with a product of Type=Vehicle

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

Related Topic

- "Associating an Option with a Product of Type=Vehicle" on page 84

Adding Product Features and Specifications

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

This task is a step in "Process of Managing Products" on page 83.

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

Working with Product Features

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

This task is a step in "Adding Product Features and Specifications" on page 85.

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

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

Associating a Feature with a Product

Use this procedure to associate a feature with a product.

This task is a step in "Adding Product Features and Specifications" on page 85.

To associate a feature with a product

1. Navigate to the Administration - Product screen > Products view.
2. Drill down on the Name field link for a selected product record.
3. In the Administration - Product link bar, click the Features link.
4. In the Features list, create a new record.
5. In the Category field, select the category for the feature you just created in "Working with Product Features" on page 85.
6. Complete the fields as necessary.

Working with Product Specifications

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

This task is a step in "Adding Product Features and Specifications" on page 85.

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

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

Associating a Specification with a Product

Use this procedure to associate a specification with a product.

This task is a step in "Adding Product Features and Specifications" on page 85.

To associate a specification with a product

1. Navigate to the Administration - Product screen > Products view.
2. Select the product record that you want to associate a specification with.
3. In the Administration - Product link bar, click the Specifications link.
4. In the Specifications list, create a new record.
5. In the Category field, select the category for the specification you just created in "Working with Product Specifications" on page 86.
6. Complete the fields as necessary.

11 Associating Vehicles with Opportunities

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

- "Opportunity Defined" on page 87
- "Associating a Vehicle with an Opportunity" on page 87

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

Opportunity Defined

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

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

Associating a Vehicle with an Opportunity

Use this procedure to associate a vehicle, vehicle model, and product line with an existing opportunity.

To associate a vehicle with an opportunity

1. Navigate to the Opportunities screen > Opportunities List view.
2. Drill down on the Opportunity Name field link for a selected opportunity record.
3. Click the Revenues view tab.
4. In the Revenues link bar, click the List link.
5. In the List, add, edit, or delete records.

6. Complete the fields as necessary.

   Some fields are described in the following table.

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

12 Setting Up Households

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

- "Households Defined" on page 89
- "Scenario for Working with Households" on page 89
- "Process of Working with Households" on page 90
- "Viewing Vehicles Associated with a Household" on page 90
- "Associating Team Members with a Household" on page 90

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

Households Defined

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

Process of Working with Households

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

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

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

- "Viewing Vehicles Associated with a Household" on page 90
- "Associating Team Members with a Household" on page 90

Viewing Vehicles Associated with a Household

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

This task is a step in "Process of Working with Households" on page 90.

To view vehicles associated with a household

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

Related Topic

- "Associating Team Members with a Household" on page 90

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 followup 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 Working with Households" on page 90.

To associate team members with a household

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

Related Topic

- "Viewing Vehicles Associated with a Household" on page 90

13 Managing Quotes

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

- "About Quotes" on page 93
- "Scenario for Working with Automotive Quotes" on page 93
- "Quotes Process Workflow" on page 94
- "Process of Creating Quotes" on page 94
- "Setting the Price List for Quotes" on page 95
- "Creating Quotes" on page 95
- "Copying or Revising a Quote" on page 95
- "Allocating Vehicles to a Quote" on page 97

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

About Quotes

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

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

Scenario for Working with Automotive Quotes

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

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

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

Quotes Process Workflow

Figure 10 illustrates the end-user workflow for working with quotes.

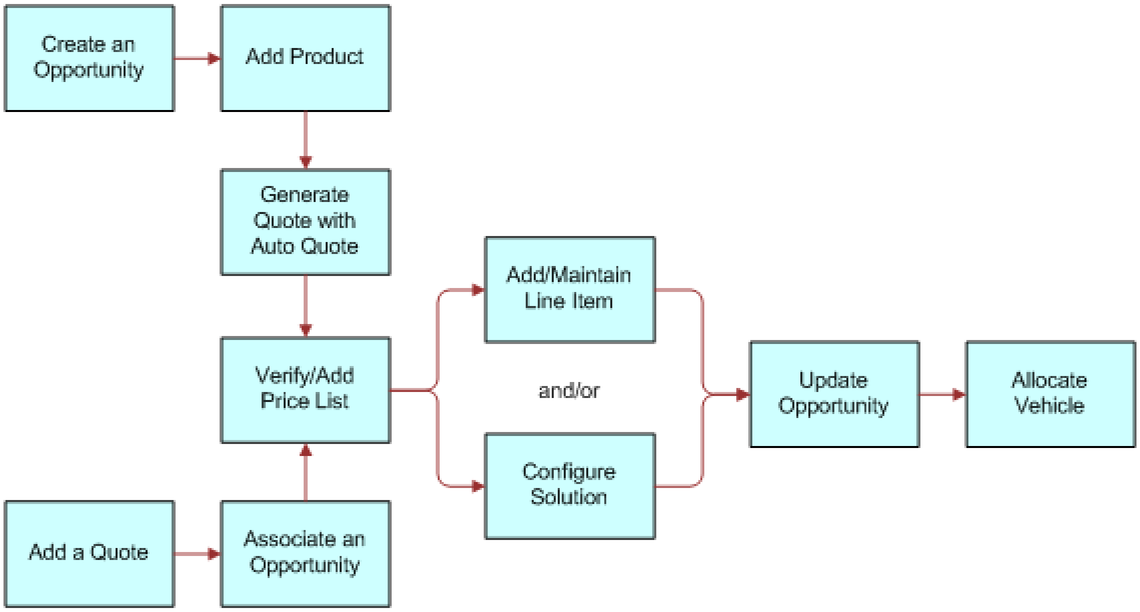
Create an Opportunity
Add Product
Generate Quote with Auto Quote
Verify/Add Price List
Add/Maintain Line Item
and/or
Configure Solution
Update Opportunity
Allocate Vehicle
Add a Quote
Associate an Opportunity

Figure 10. 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

To create quotes, end users perform the following tasks:

- "Setting the Price List for Quotes" on page 95
- "Creating Quotes" on page 95
- "Copying or Revising a Quote" on page 95
- "Allocating Vehicles to a Quote" on page 97

Setting the Price List for Quotes

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

This task is a step in "Process of Creating Quotes" on page 94.

To set a default price list

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

Related Topics

- "Creating Quotes" on page 95
- "Copying or Revising a Quote" on page 95
- "Allocating Vehicles to a Quote" on page 97

Creating Quotes

Use this procedure to create quotes.

This task is a step in "Process of Creating Quotes" on page 94.

To create a new quote

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

Related Topics

- "Setting the Price List for Quotes" on page 95
- "Copying or Revising a Quote" on page 95
- "Allocating Vehicles to a Quote" on page 97

Copying or Revising a Quote

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

- "Using Copy Record to Copy or Revise a Quote" on page 96

- "Using Revise to Copy or Revise a Quote" on page 97

This task is a step in "Process of Creating Quotes" on page 94.

NOTE: The user can use the Quote screen to create a new opportunity associated with an existing or new account. The user cannot use the Quotes screen to edit any existing opportunity or account. The user cannot change the association between any existing opportunity and account, but the user can associate a different opportunity or account with the quote.

Related Topics

- "Setting the Price List for Quotes" on page 95
- "Creating Quotes" on page 95
- "Allocating Vehicles to a Quote" on page 97

Using Copy Record to Copy or Revise a Quote

This procedure uses the Copy Record command to copy or revise a quote.

To use Copy Record to copy or revise a quote

1. Navigate to the Quotes screen > List view.
2. Select a quote record that you want to copy or revise.
3. Click Menu, and select Copy Record.

   The following action occurs:

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

Related Topics

- "Setting the Price List for Quotes" on page 95
- "Creating Quotes" on page 95
- "Copying or Revising a Quote" on page 95
- "Allocating Vehicles to a Quote" on page 97

Using Revise to Copy or Revise a Quote

This procedure uses the Revise button to copy or revise a quote.

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

To use Revise to copy or revise a quote

1. Navigate to the Quotes screen > List view.
2. Select a quote record that you want to copy or revise.
3. Click Revise.

   The following action occurs:

   - All appropriate data is copied to the new record, including the Name and Quote Number fields, excluding the Revision field.
   - The quote number remains the same.
   - The number in the Revision field increases.
   - The previous revision deactivates.
   - All line items and the price list are copied.
   - The status is set to the first status value (usually In Progress).
   - The Date field reflects today’s date.

Related Topics

- “Setting the Price List for Quotes” on page 95
- “Creating Quotes” on page 95
- “Copying or Revising a Quote” on page 95
- “Allocating Vehicles to a Quote” on page 97

Allocating Vehicles to a Quote

Use this procedure to allocate a vehicle from dealer inventory in order to reserve the vehicle for a specific customer opportunity.

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

This task is a step in “Process of Creating Quotes” on page 94.

To allocate vehicles to a quote

1. Navigate to the Quotes screen > List view.
2. Drill down on the Quote # field link for a selected quote record.

3. Click the Vehicles view tab.
4. Select the product record upon which the vehicle was based.
5. Scroll down to the Vehicles list, and create a new record.
6. Click the select button on the VIN # field.

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

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

7. Select a vehicle and click ok.

Related Topics

- "Creating Quotes" on page 95
- "Copying or Revising a Quote" on page 95

14 Managing Service Requests

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

- "Service Requests Defined" on page 99
- "About Service Request Channels" on page 99
- "Scenario for Working with Automotive Service Requests" on page 100
- "Process of Working with Service Requests" on page 100
- "Assigning the Service Request" on page 101
- "Providing Details of Services to Be Performed" on page 103
- "Researching and Resolving a Service Request" on page 103

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

Service Requests Defined

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

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

About Service Request Channels

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

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

- Customers walking into a service center

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

Scenario for Working with Automotive Service Requests

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

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

Process of Working with Service Requests

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

To work with service requests, end users perform the following tasks.

- "Creating a Service Request" on page 100
- "Assigning the Service Request" on page 101
- "Providing Details of Services to Be Performed" on page 103
- "Researching and Resolving a Service Request" on page 103

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" on page 100.

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. Navigate to the Service Requests screen > Service Requests List view.
2. From the visibility filter, select My Service Requests.
3. In the Service Request form, create a new record.
    - a. In the Type field, select Asset Finance.
    - b. In the Area field, select the type of service request.
4. Complete the fields as necessary.

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

Assigning the Service Request

This topic discusses the three ways to assign a service request and the circumstances under which each would be appropriate.

This task is a step in "Process of Working with Service Requests" on page 100.

Assigning the Service Request Manually

Use this procedure to assign a service request to a representative after the details have been entered, and it has been determined that the issue cannot be resolved by the receiving representative. Service requests can be assigned to a dealer or a service center.

To assign a service request manually

1. Navigate to the Service Requests screen > Service Requests List view.
2. From the visibility filter, select All Service Requests.
3. Select a SR # record.
4. In the Sub Status field, select Assigned.
5. In the Owner field, select the person to whom you want to assign the request.

Using Assignment Manager to Assign Service Requests

This method of assigning service requests requires a representative to use Assignment Manager. Assignment Manager automatically designates a customer service representative or call center agent based on skill level and availability.

To assign a service request using Assignment Manager

1. Navigate to the Service Requests screen > Service Requests List view.
2. From the visibility filter, select All Service Requests.
3. Select a SR # record.
4. In the lower form applet, click Menu, and select Assign.

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

Assigning Service Requests Using Dealer Assignment

Use this procedure to automatically assign a service request to a dealer or set up an appointment time with a dealer to deal with a service request.

To use Dealer Assignment to assign service requests

1. Navigate to the Service Requests screen > Service Requests List view.
2. Drill down on the SR # field link for a selected service request record.
3. Click the Dealer Assignment view tab and perform actions appropriate for your situation, as described in the following table.

To...	Then...
Assign the service request	Select one of the following options from the Automatically Assign Service Request to a Dealer drop-down list: ■ 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 77.
Manually pick the dealer to assign this service request	Select the dealer from the Pick a Dealer field.
Set an appointment	Create a new record in the Appointment Time form and enter the time and date of the appointment.

Providing Details of Services to Be Performed

Use this procedure to view, edit, create, and delete record details of services to be performed for this service request.

This task is a step in "Process of Working with Service Requests" on page 100.

To provide details of services to be performed

1. Navigate to the Service Requests screen > Service Requests List view.
2. Drill down on the SR # field link for a selected service request record.
3. Click the Services To Be Performed view tab.
4. In the Services To Be Performed list, add, edit, or delete records.

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

Researching and Resolving a Service Request

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

This task is a step in "Process of Working with Service Requests" on page 100.

To research and resolve a service request

1. Navigate to the Service Requests screen > Service Requests List view.
2. Drill down on the SR # field link for a selected service request record that you want to resolve.
3. To view related service requests, click the Related SRs view tab to see if the problem has been solved before.

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

If...	Then...
You find a relevant service request	Use Attach to attach it to the current service request.
A solution is still needed	Perform a full knowledge search and attach any relevant solutions to the current service request.

4. From the Status field drop-down list, select Closed.

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

15 Tracking Service History

This chapter describes how to use Siebel Automotive's Service History screen to view information about the types of services and repairs done on a specific vehicle. It consists of the following topics:

- "Overview of Tracking Services and Repairs" on page 105
- "Scenario for Tracking Automotive Service History Scenario" on page 105
- "Process of Tracking Service History" on page 106
- "Creating a New Service History Record" on page 106
- "Managing Services Performed" on page 106
- "Managing Manufacturer and Customer Pay" on page 107
- "Working with Service History" on page 107

Overview of Tracking Services and Repairs

Customers, manufacturers, and dealers can keep track of all services and repairs performed on vehicles.

Scenario for Tracking Automotive Service History Scenario

This 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 is able to view the service history.

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

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

Process of Tracking Service History

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

To track service history, end users perform the following tasks:

- "Creating a New Service History Record" on page 106
- "Managing Services Performed" on page 106
- "Managing Manufacturer and Customer Pay" on page 107
- "Working with Service History" on page 107

Creating a New Service History Record

Use this procedure to add a new service history record.

This task is a step in "Process of Tracking Service History" on page 106.

To create a service history record

1. Navigate to the Service History screen.
2. In the Service History list, create a new record.
3. Complete the fields as necessary.

Related Topics

- "Managing Services Performed" on page 106
- "Managing Manufacturer and Customer Pay" on page 107
- "Working with Service History" on page 107

Managing Services Performed

Use this procedure to view, edit, create, and delete services performed.

This task is a step in "Process of Tracking Service History" on page 106.

To view, edit, create, and delete services performed

1. Navigate to the Service History screen.
2. Drill down on the SR # field link for a selected service request record.
3. Click the Services Performed view tab.

4 In the Services Performed list, add, edit, or delete records.

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

Related Topics

- "Creating a New Service History Record" on page 106
- "Managing Manufacturer and Customer Pay" on page 107
- "Working with Service History" on page 107

Managing Manufacturer and Customer Pay

Use this procedure to show manufacturer and customer pay records.

This task is a step in "Process of Tracking Service History" on page 106.

To manage manufacturer and customer pay

1. Navigate to the Service History screen.
2. Drill down on the SR # field link for a selected service request record.
3. Click the Labor Operation Codes view tab.

In	You can
The Manufacturing Pay list	Add, edit, or delete records.
The Customer Pay list	Add, edit, or delete records.

Related Topics

- "Creating a New Service History Record" on page 106
- "Managing Services Performed" on page 106
- "Working with Service History" on page 107

Working with Service History

Use this procedures to view, edit, create, and delete service history for a vehicle or for a contact.

This task is a step in "Process of Tracking Service History" on page 106.

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

1. Navigate to the Vehicles screen.
2. Drill down on the VIN field link for a selected vehicle record.
3. Click the Service History view tab.
4. In the Service History list, add, edit, or delete records.

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

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

Related Topics

- "Creating a New Service History Record" on page 106
- "Managing Services Performed" on page 106
- "Managing Manufacturer and Customer Pay" on page 107

16 Tracking Sales History

This chapter provides information about standard Siebel Automotive functionality for tracking sales history. It consists of the following topics:

- "About Tracking Sales History" on page 109
- "Scenario for Tracking Automotive Sales History" on page 109
- "Process of Tracking Sales History" on page 110
- "Creating a New Sales History Record" on page 110
- "Viewing Sales History" on page 110

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

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

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

Process of Tracking Sales History

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

To track sales history, end users perform the following tasks:

- "Creating a New Sales History Record" on page 110
- "Viewing Sales History" on page 110

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

Creating a New Sales History Record

A dealer can use this procedure to add a new sales history record.

NOTE: Most sales history records are added to Siebel Automotive using Enterprise Integration Manager (EIM).

This task is a step in "Process of Tracking Sales History" on page 110.

To create a sales history record

1. Navigate to the Sales History screen.
2. In the Sales History list, create a new record.

Related Topic

- "Viewing Sales History" on page 110

Viewing Sales History

Use these procedures to view sales history for a vehicle or for a contact. The Sales History screen contains a list of all sales transactions.

This task is a step in "Process of Tracking Sales History" on page 110.

To view the sales history for a particular vehicle

1. Navigate to the Vehicles screen.
2. Drill down on the VIN field link for a selected vehicle record.
3. Click the Sales History view tab.

To view the sales history for a particular contact

1. Navigate to the Contacts screen > Contacts List view.
2. Drill down on the Last Name field link for a selected contact record.
3. Click the Sales History view tab.

Related Topic

- "Creating a New Sales History Record" on page 110

17 Setting Up Preventive Maintenance

This chapter provides information about standard Siebel Automotive functionality for preventive maintenance that is relevant to both application administrators and end users, including service and support center representatives. It consists of the following topics:

- "Scenarios for Working with Automotive Preventive Maintenance" on page 113
- "Process of Setting Up Preventive Maintenance" on page 114
- "Setting a Trigger for a PM Plan" on page 114
- "Associating a PM Plan with a Product" on page 115
- "Associating a PM Plan with Vehicles" on page 115
- "Process of Tracking Preventive Maintenance" on page 116
- "Viewing PM History for a Vehicle" on page 116
- "Working with PM Plans for a Vehicle" on page 117

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

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

Scenarios for Working with Automotive Preventive Maintenance

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

This 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" on page 113
- "Triggered Maintenance Scenario" on page 114

Periodic Maintenance Scenario

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

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

Triggered Maintenance Scenario

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

Process of Setting Up Preventive Maintenance

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

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

To set up preventive maintenance, perform the following tasks:

- "Setting a Trigger for a PM Plan" on page 114
- "Associating a PM Plan with a Product" on page 115
- "Associating a PM Plan with Vehicles" on page 115

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

Setting a Trigger for a PM Plan

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

This task is a step in "Process of Setting Up Preventive Maintenance" on page 114.

To set up a trigger for a PM plan

1. Navigate to the Preventive Maintenance screen > Preventive Maintenance List view.
2. Select a PM plan record.
3. Click the Triggers view tab, and take the following action:

- **Time Interval list.** Add, Edit, or Delete records.
- **Usage list.** Add, Edit, or Delete records.
- **Month-Day list.** Add, Edit, or Delete records.
- **Threshold list.** Add, Edit, or Delete records.
- **Event list.** Add, Edit, or Delete records.

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

Related Topics

- "Associating a PM Plan with a Product" on page 115
- "Associating a PM Plan with Vehicles" on page 115

Associating a PM Plan with a Product

After you define the PM plan triggers, use this procedure to associate it with a product you added. See "Managing Products" on page 81 for more information on using Products.

This task is a step in "Process of Setting Up Preventive Maintenance" on page 114.

To associate a PM plan with a product

1. Navigate to the Preventive Maintenance screen > Preventive Maintenance List view.
2. Select a PM plan record.
3. Click the Products view tab.
4. In the Products list, add, edit, or delete records.

Related Topics

- "Setting a Trigger for a PM Plan" on page 114
- "Associating a PM Plan with Vehicles" on page 115

Associating a PM Plan with Vehicles

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

This task is a step in "Process of Setting Up Preventive Maintenance" on page 114.

To associate a PM plan with a vehicle or vehicles

1. Navigate to the Preventive Maintenance screen > Preventive Maintenance List view.
2. Select a PM plan record.
3. Click the Products view tab.
4. Select a product record.
5. Scroll down to the Assets list, add, edit, or delete records.

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

Related Topics

- "Setting a Trigger for a PM Plan" on page 114
- "Associating a PM Plan with a Product" on page 115

Process of Tracking Preventive Maintenance

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

To use Siebel Automotive for preventive maintenance tracking, end users perform the following tasks.

- "Viewing PM History for a Vehicle" on page 116
- "Working with PM Plans for a Vehicle" on page 117

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

Viewing PM History for a Vehicle

Use this procedure to view the preventive maintenance actions for a vehicle through the Preventive Maintenance tab of the Vehicles screen.

This task is a step in "Process of Tracking Preventive Maintenance" on page 116.

To view PM history for a vehicle

1. Navigate to the Vehicles screen.
2. Drill down on the VIN field link for a selected vehicle record.
3. Click the Preventive Maintenance view tab.
4. In the Preventive Maintenance link bar, click the History link, if it is not already selected.

5. When a PM action is completed, enter data in the Date Completed and Completed Reading fields.

   The Completed Reading field is the reading for that particular preventive maintenance action. This value could be mileage, or oil level, and so on.

6. To view more details about the preventive maintenance plan, drill down on the link in the Plan Item Name field.

Related Topic

- "Working with PM Plans for a Vehicle" on page 117

Working with PM Plans for a Vehicle

Use this procedure to view, edit, create, and delete preventive maintenance plans for a vehicle through the Preventive Maintenance tab of the Vehicles screen.

This task is a step in "Process of Tracking Preventive Maintenance" on page 116.

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

1. Navigate to the Vehicles screen.
2. Drill down on the VIN field link for a selected vehicle record.
3. Click the Preventive Maintenance view tab.
4. In the Preventive Maintenance link bar, click the Plan link, if it is not already selected.
5. In the Plan list, add, edit, or delete records.

Related Topic

- "Viewing PM History for a Vehicle" on page 116

18 Setting Up and Using Siebel Automotive Tools

This chapter covers how to set up and use Siebel Automotive tools for end users—Dealer Locator, Vehicle Inventory Search, and Financial Calculator. It consists of the following topics:

- "Setting Up the Dealer Locator (Administrators)" on page 119
- "Locating a Dealer (End Users)" on page 120
- "Setting Up Vehicle Search" on page 120
- "Searching for a Vehicle" on page 121
- "Calculating Loans and Leases" on page 121

Process of Locating a Dealer

To locate a dealer, perform the following tasks:

- "Setting Up the Dealer Locator (Administrators)" on page 119
- "Locating a Dealer (End Users)" on page 120

Setting Up the Dealer Locator (Administrators)

Administrators use the following procedure to control the settings for the Dealer Locator, which is used to find dealers near various end users. Dealer Locator needs to be set up before inventory search can work.

This task is a step in "Process of Locating a Dealer" on page 119.

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

To set up a dealer location

1. Navigate to the Administration - Application screen > Dealer Location Administration view.
2. In the Dealer Locations list, add, edit, or delete records.
3. Complete the fields as necessary.

Locating a Dealer (End Users)

End users use this procedure to locate dealers by the contact information for the dealer.

This task is a step in "Process of Locating a Dealer" on page 119.

To locate a dealer

- Navigate to the Automotive Tools screen > Dealer Locator view.

TIP: You can also use the * wildcard character to enter partial City names and ZIP Codes to increase the number of dealers that the locator finds. For example, typing `Fern*` in the City field matches all cities with names that begin with Fern. Typing 9461* in the ZIP Code field matches all ZIP Codes that begin with 9461.

Process of Searching for a Vehicle

To search for a vehicle, end users perform the following tasks:

- "Setting Up Vehicle Search" on page 120
- "Searching for a Vehicle" on page 121

Setting Up Vehicle Search

Use this procedure to set up a vehicle in order for it to display in the inventory. As long as the Owned By, Account Name, and Status fields have been completed, the vehicle displays in the inventory. The vehicle can then be found using the Inventory Search feature.

This task is a step in "Process of Searching for a Vehicle" on page 120.

NOTE: The Dealer Locator must be set up before Inventory Search can function.

To set up vehicle search

1. Navigate to the Administration - Vehicle screen.
2. Select a VIN record.
3. In the Vehicles form applet, complete the following fields, along with any other fields as necessary.

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

Searching for a Vehicle

Use this procedure to search for a vehicle by entering the city and state or ZIP Code.

This task is a step in "Process of Searching for a Vehicle" on page 120.

To search for a vehicle in inventory

1. Navigate to the Automotive Tools screen > Vehicle Inventory Search view.
2. Enter city and state or ZIP Code.
3. Click Search.

   A list of vehicles matching the search criteria appears.

   NOTE: Click Reset to start a new search.

Calculating Loans and Leases

A loan and a lease can be calculated simultaneously from the same information. Use this procedure to calculate the monthly payment for a lease or loan, allowing a contact to compare leases with purchases, and loans of varying terms with each other. Much of the same information is required to calculate a lease or a loan. After that information has been entered, multiple calculations for leases and loans can be generated by changing the terms.

To calculate the lease and loan prices of a vehicle

1. Navigate to the Automotive Tools screen > Financial Calculator view.
2. Enter values in the fields, and click Calculate.

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