



# CONFIGURATION TRAINING

YEAR 2020

**OneDealer International GmbH**  
[www.onedealet.com](http://www.onedealet.com)

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## CONFIGURATION TRAINING COMPANY STRUCTURE

### Revision History

Revision Date	Revision No.	Revised by	Summary of Changes
28/09/20	1.3	Nikos Ioannou	Final document consistent with the training delivered in QR3-2020

# COMPANY STRUCTURE

- **SAP Business One**
- **Digital Sales Workplace**

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## 1 Prerequisite

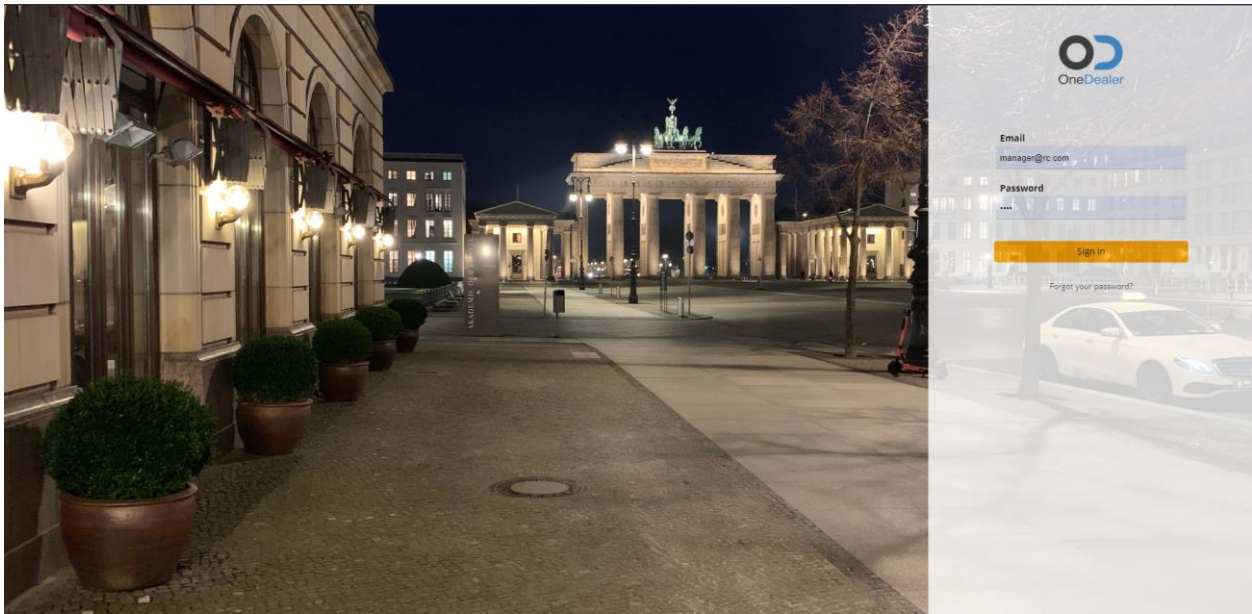
Make sure that the given user account of OneDealer has admin authorization in order to perform the following tasks.

## 2 Create a Company

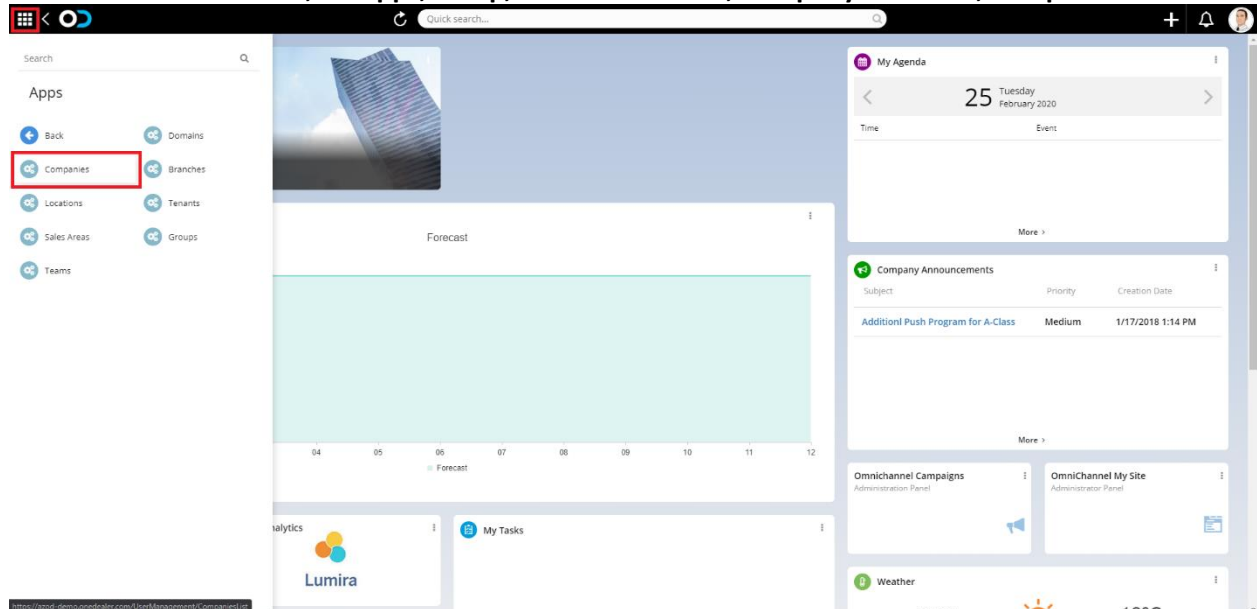
Please login to the project with the given admin account

Username: \*\*\*\*\*

Password: \*\*\*\*\*

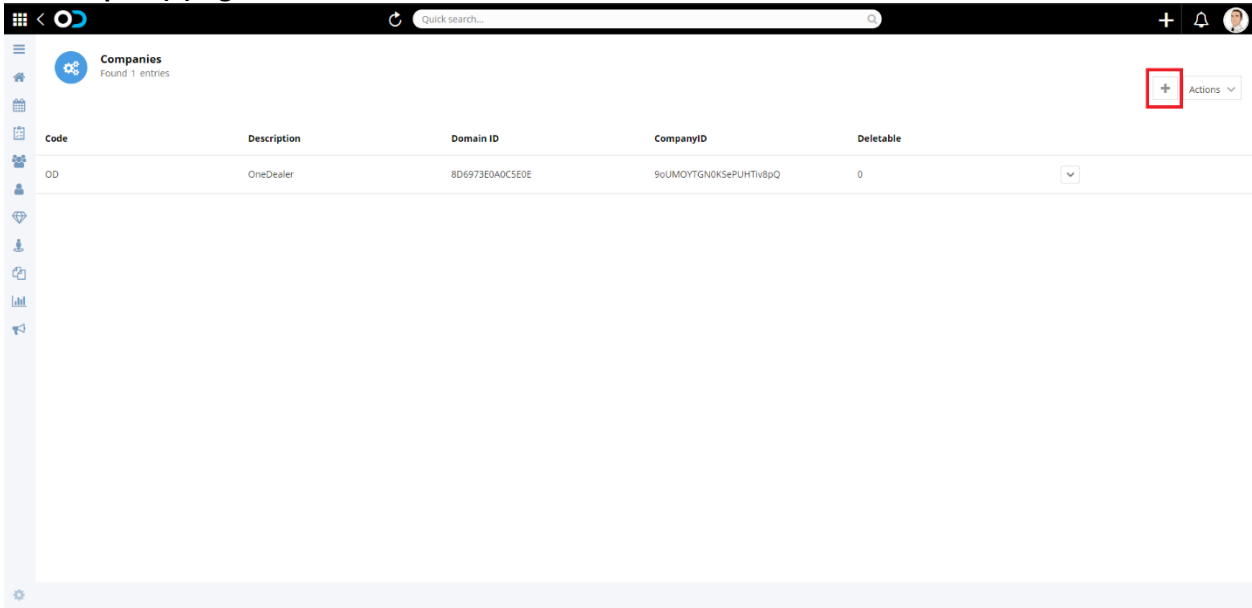


Click on 9 dot menu icon, All Apps, Setup, Common Entities, Company Structure, Companies

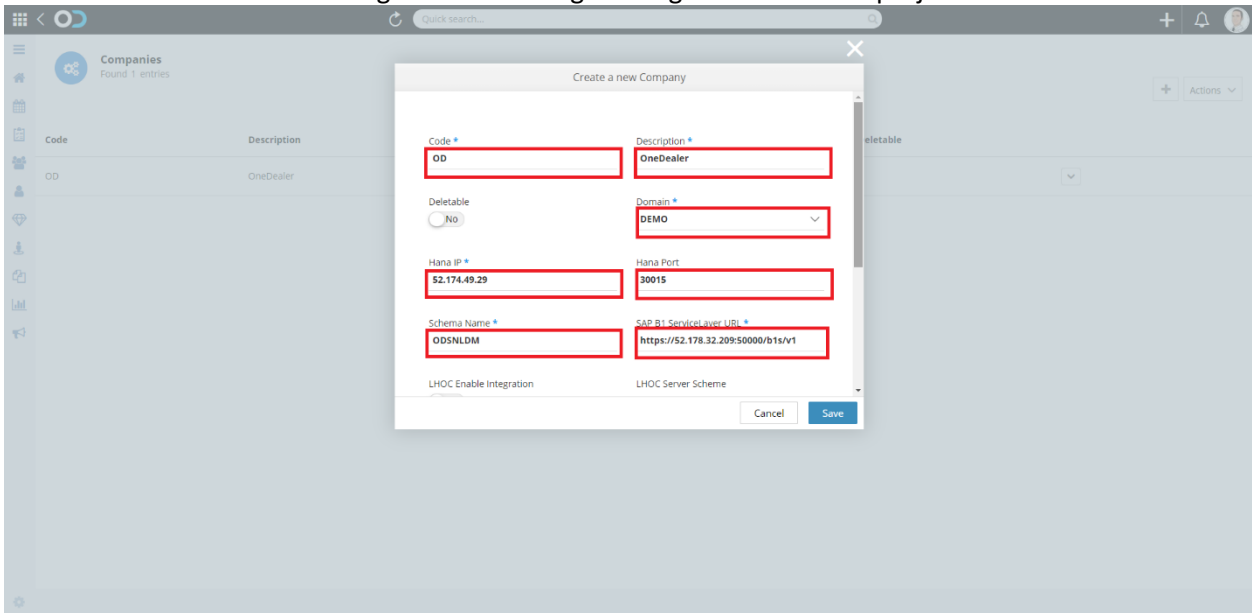


## 2.1 Add Company

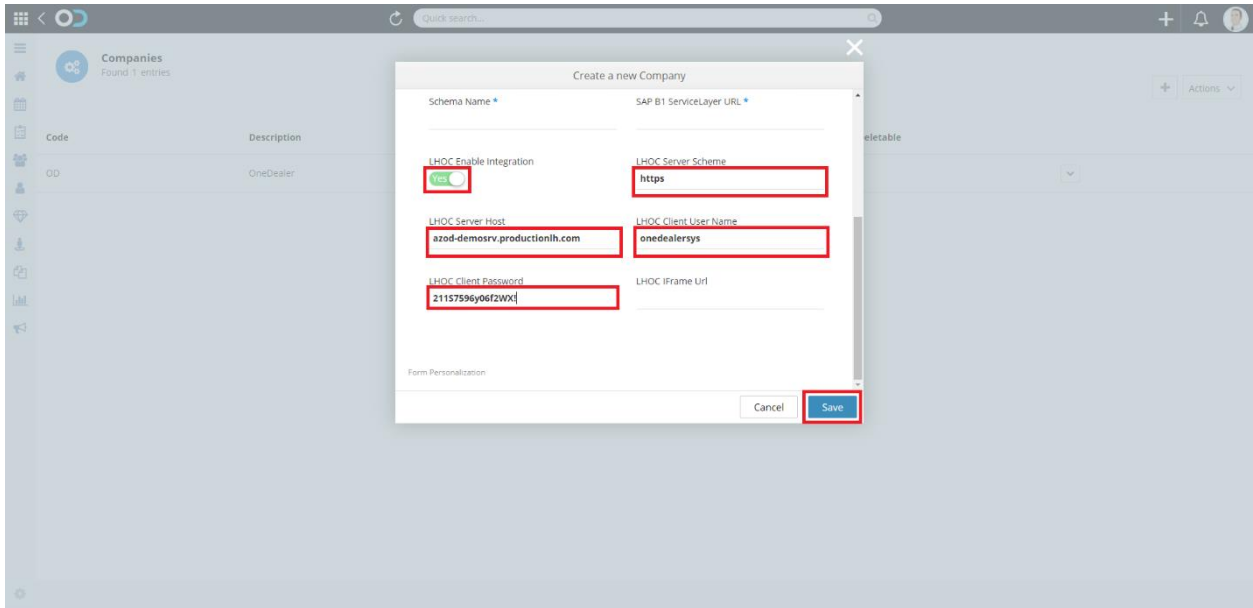
Click on plus (+) sign icon.



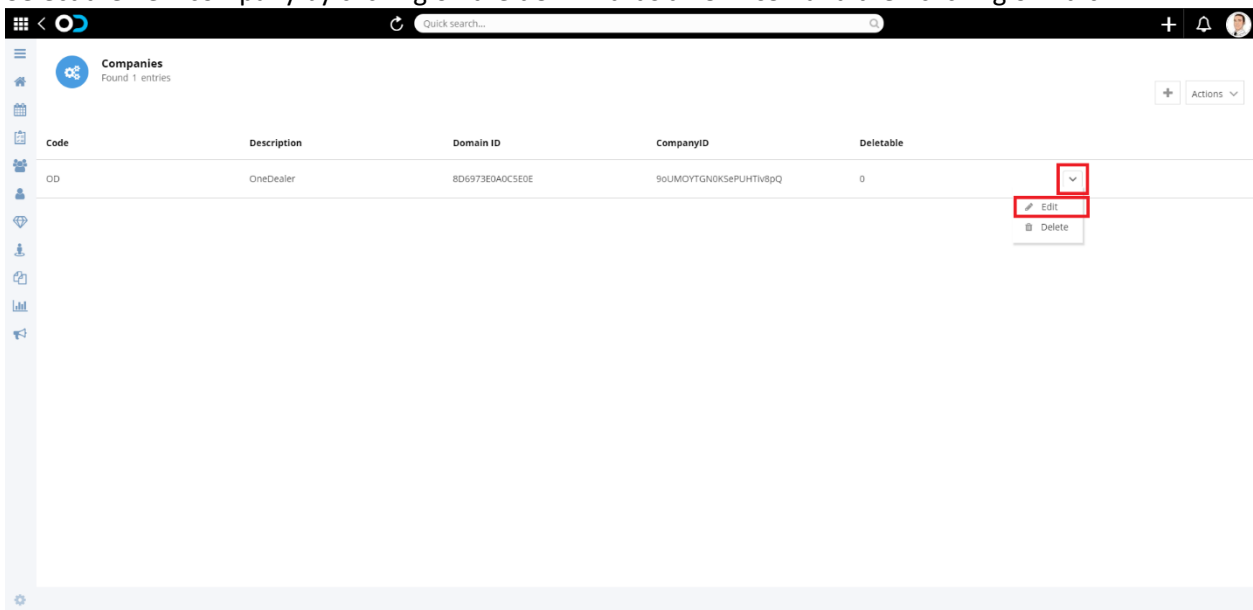
Provide content to the following fields according to the given data of the project.



Provide a few more additional fields and then click on **Save** button.



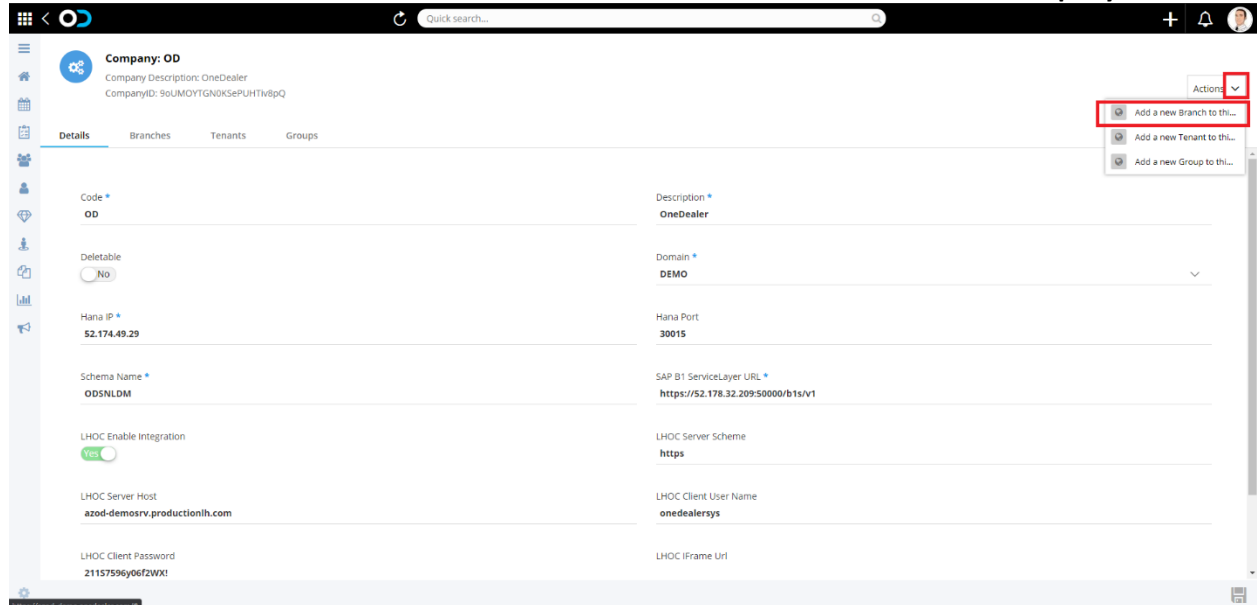
Select the new company by clicking on the **downwards arrow icon** and then clicking on **Edit**.



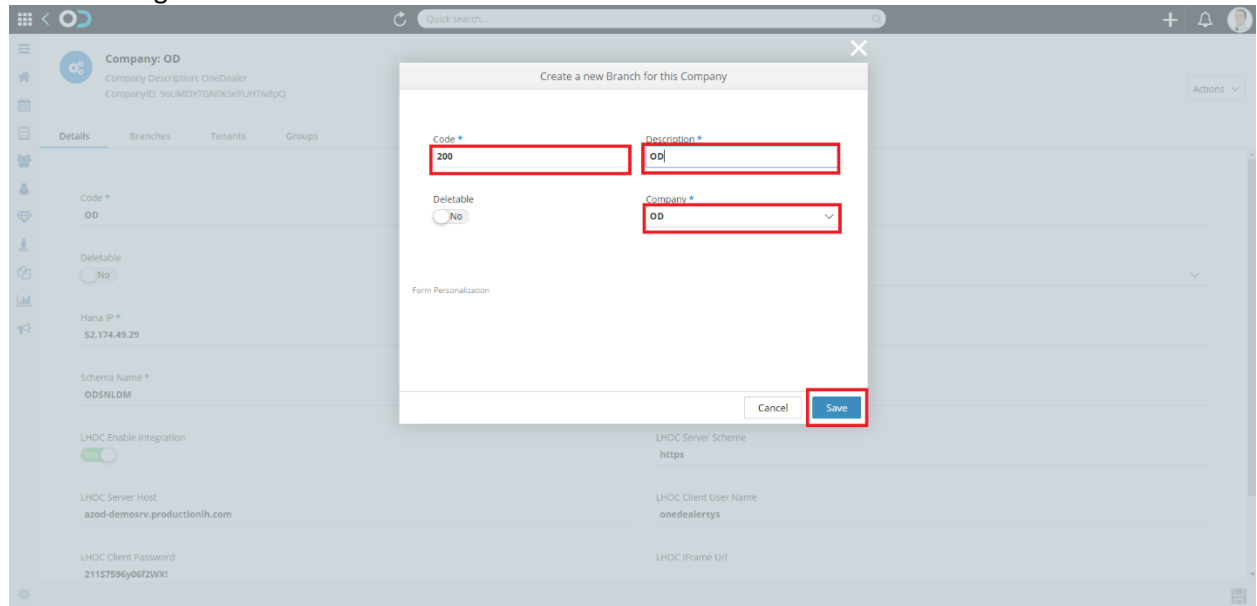


## 2.2 Add a new Branch

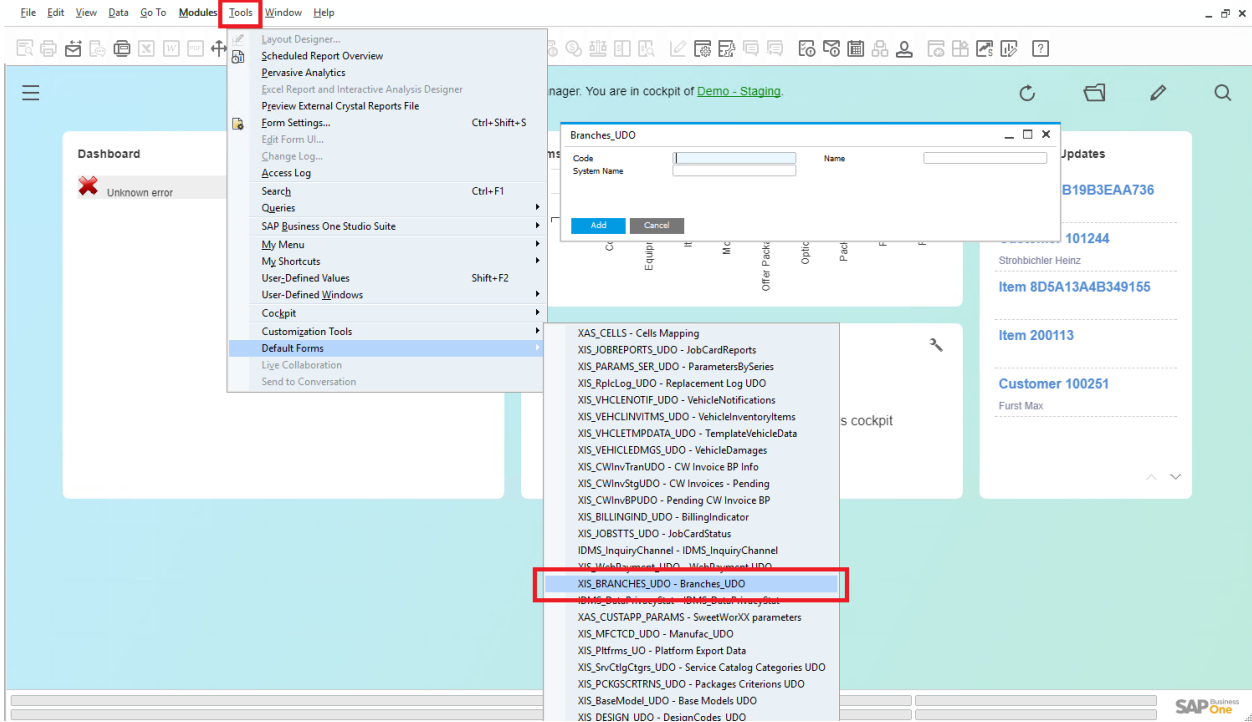
Click on **Actions** downward arrow icon and then click on **Add a new Branch to this Company**.



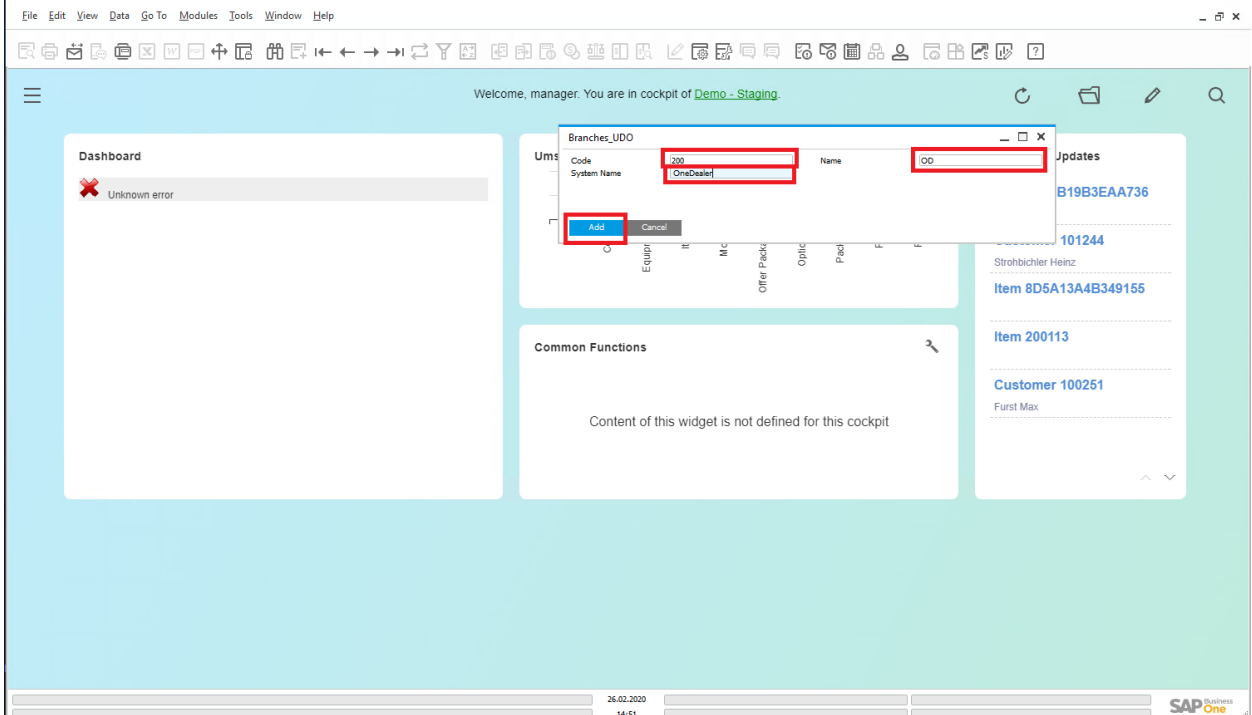
Provide the given info at the fields below and then click on **Save** button.



At SBO, click on **Tools, Default Forms, XIS\_BRANCHES\_UDO – Branches\_UDO**

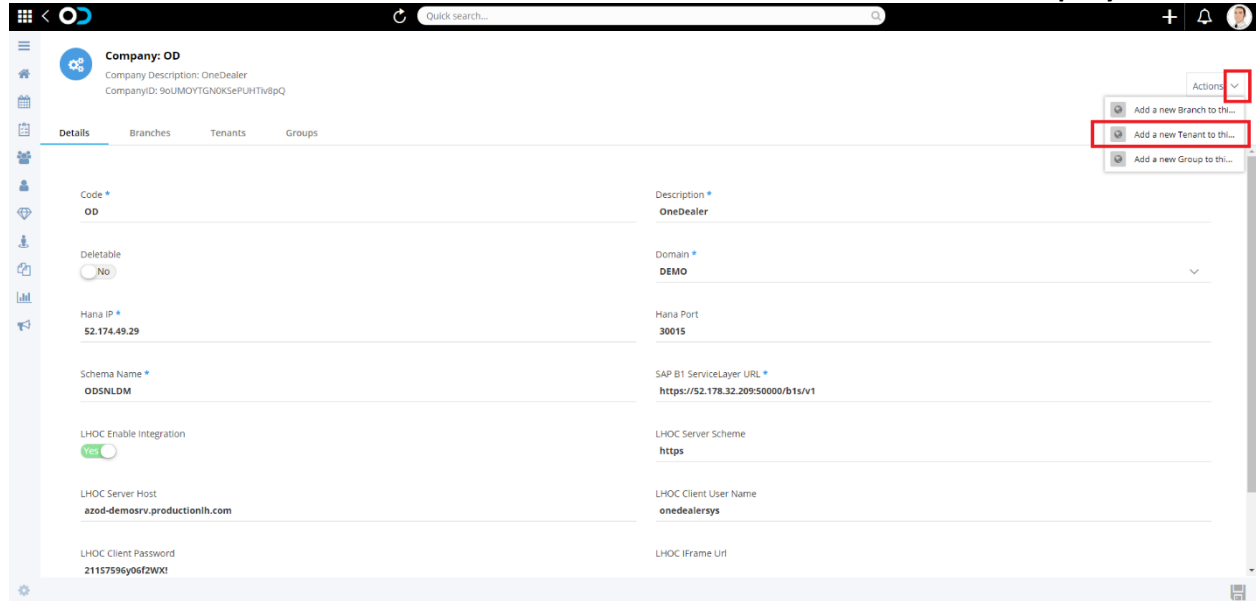


Provide content to the following fields and click **Add**.

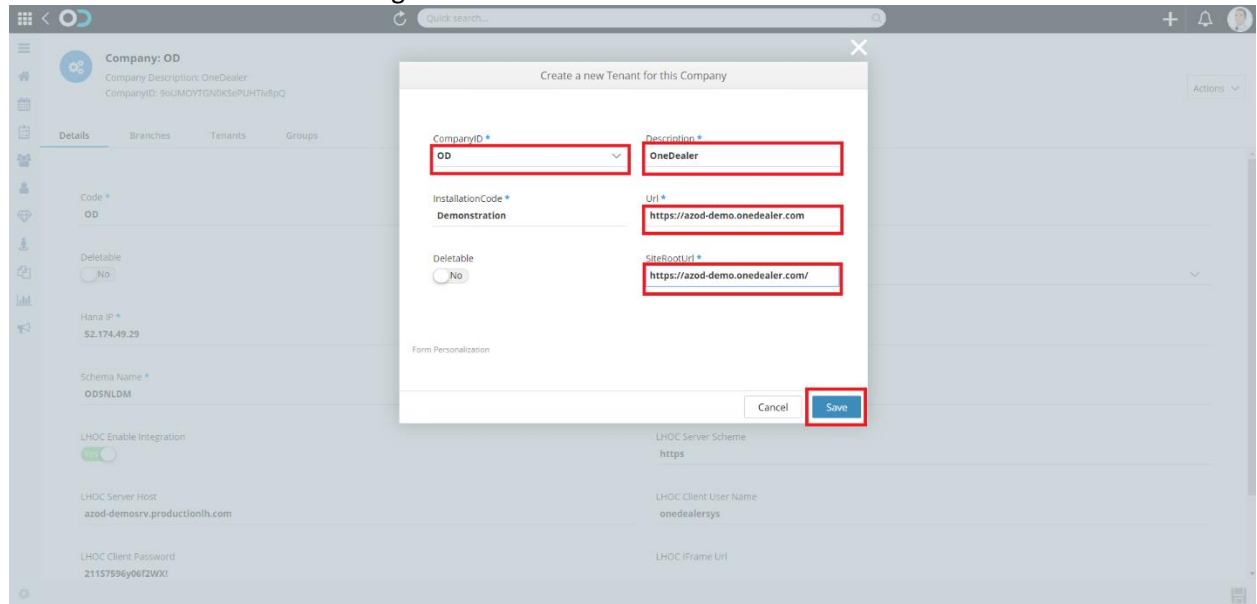


### 2.3 Add a new Tenant

Click on **Actions downward arrow icon** and then click on **Add a new Tenant to this Company**.

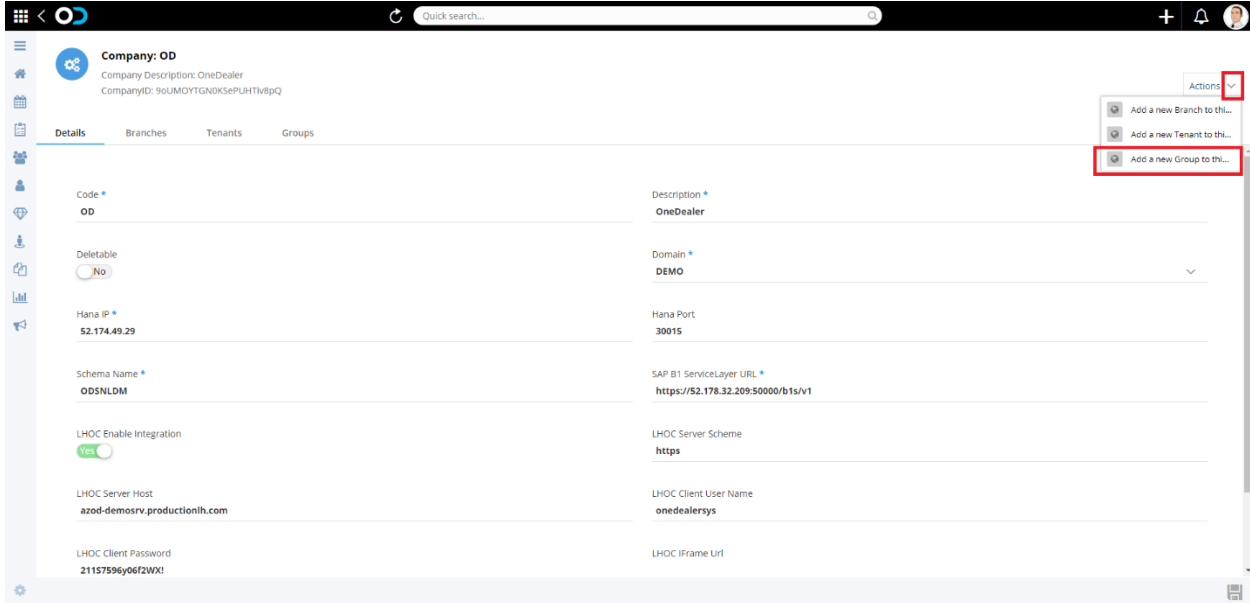


Provide content for the following fields and then click on **Save** button.

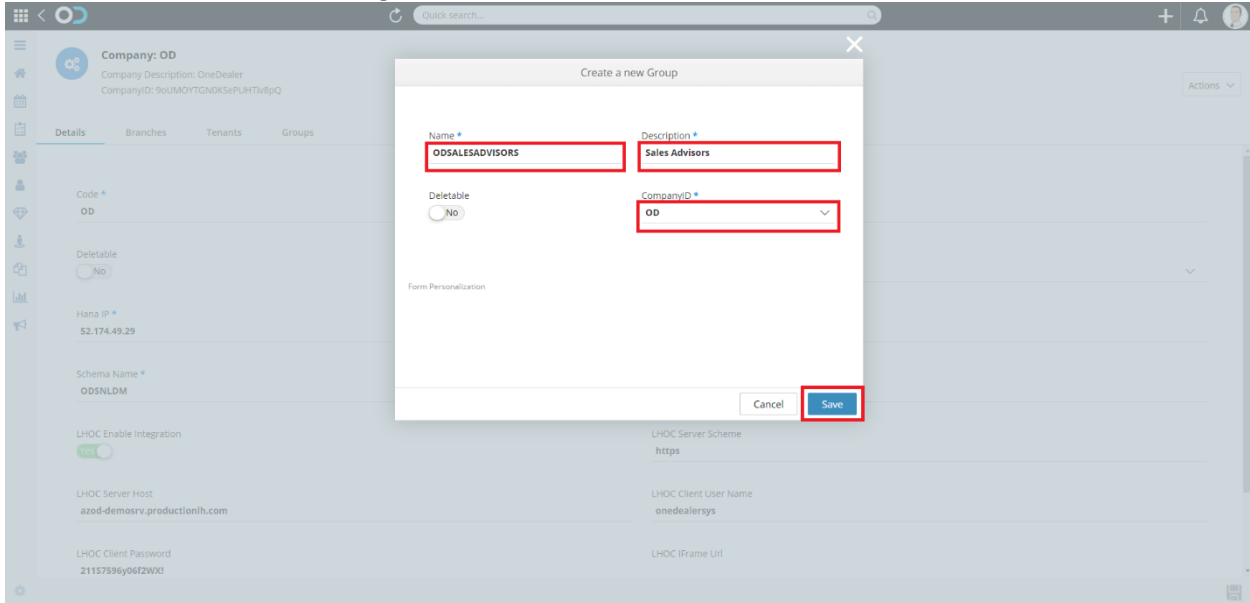


## 2.4 Add a new Group

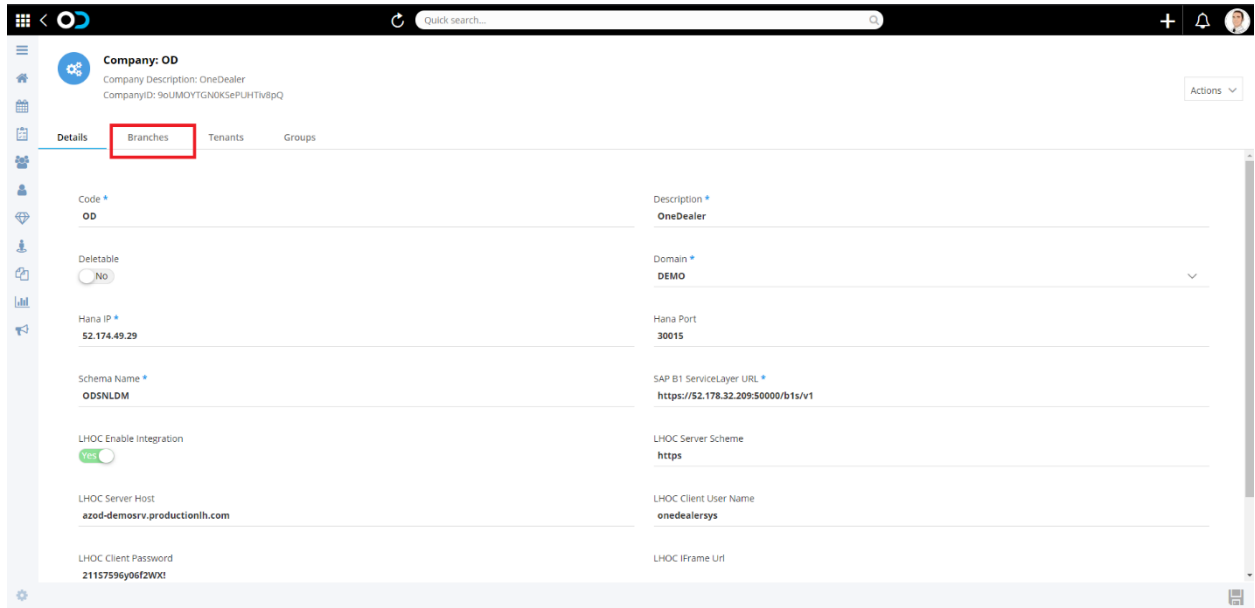
Click on **Actions** downward arrow icon and then click on **Add a new Group to this Company**.



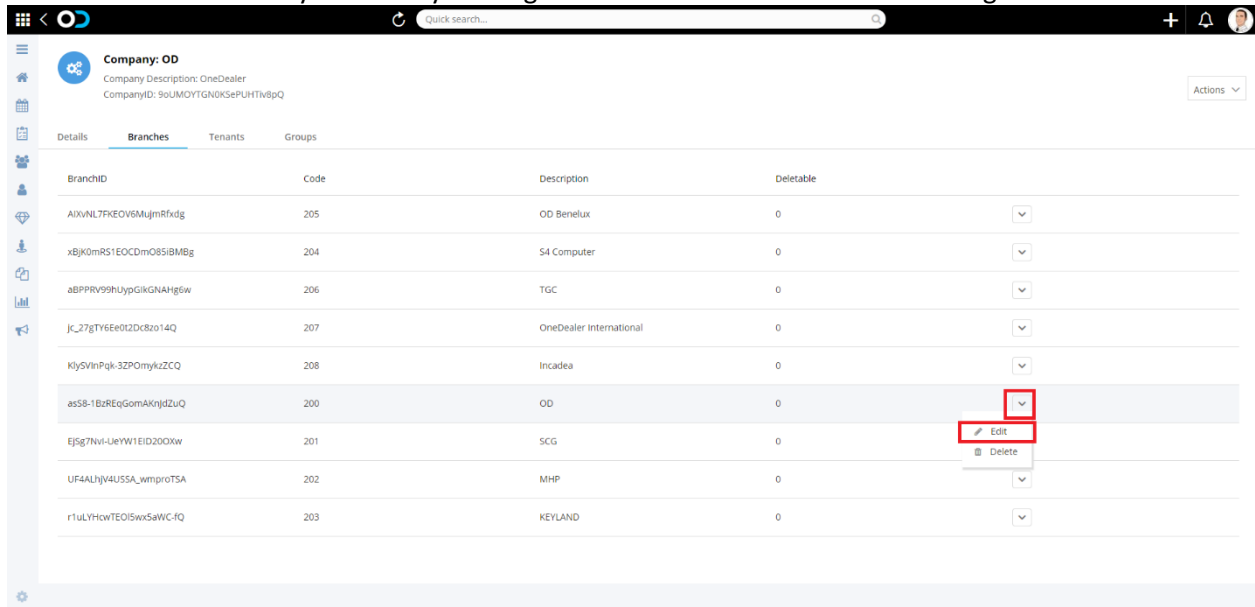
Provide content of the following fields and then click on **Save** button.



Click on **Branches** tab.

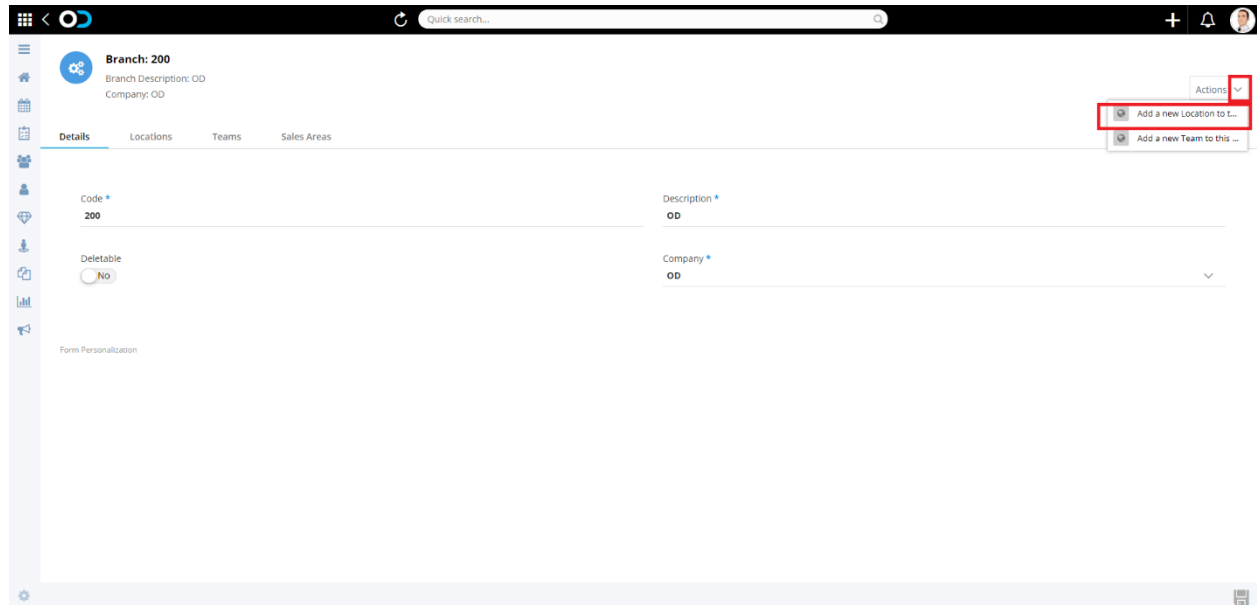


Select the branch already created by clicking on **downward arrow icon** and clicking on **Edit**.

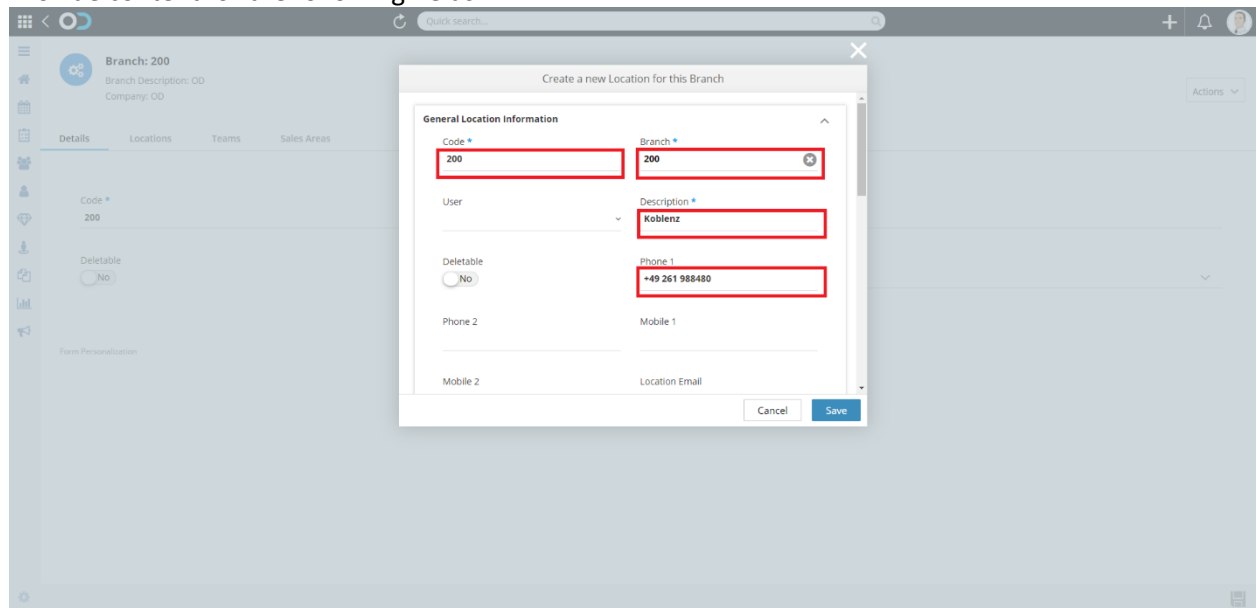


## 2.5 Add a new Location

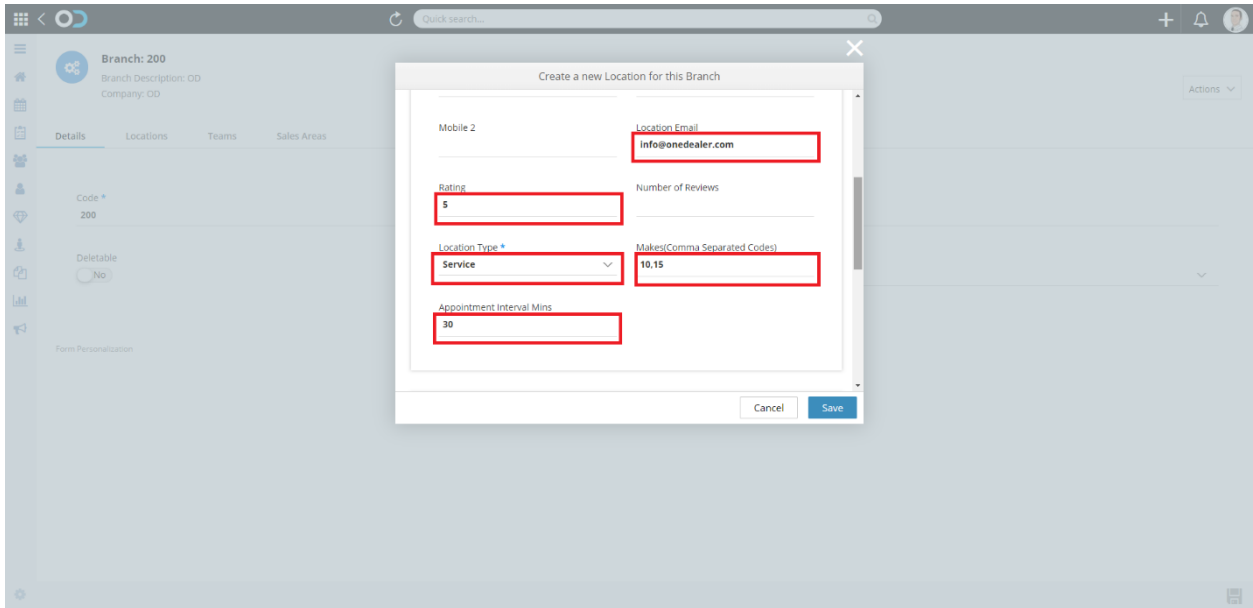
Click on **Actions downward arrow icon** and then click on **Add a new Location to this Branch.**



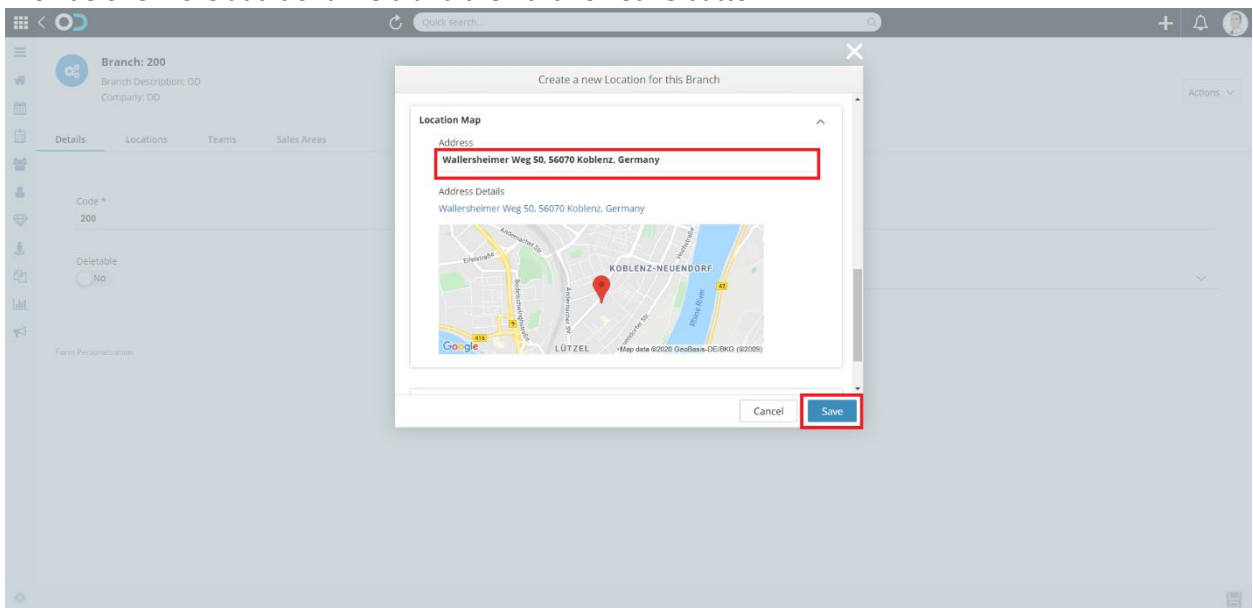
Provide content for the following fields.



A few additional fields needed.

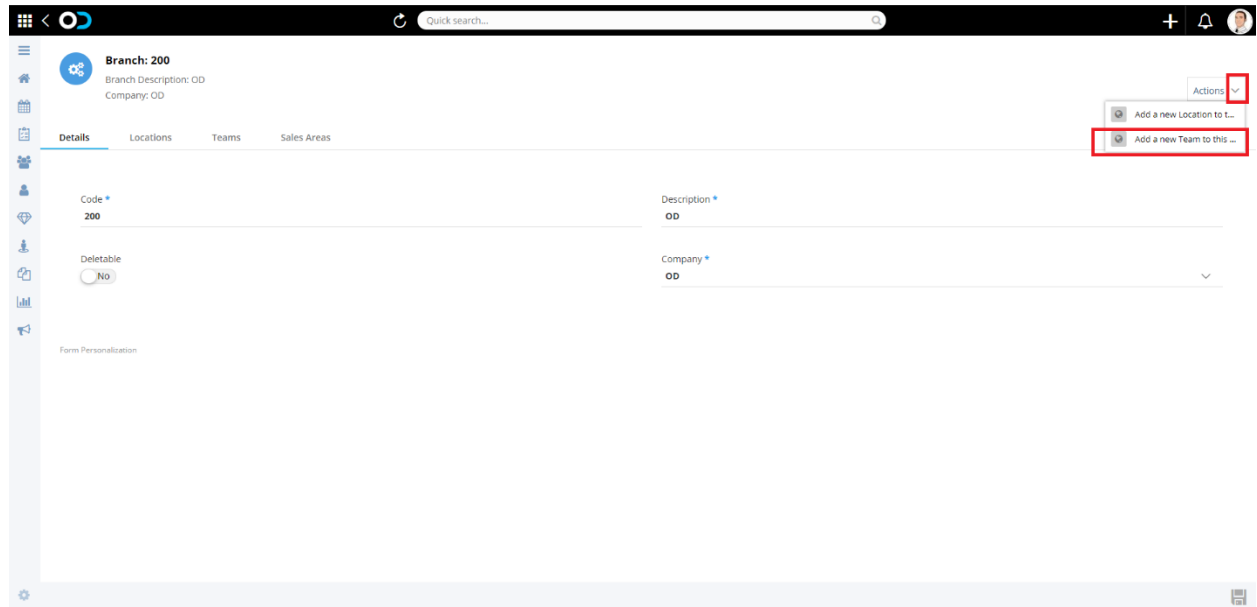


Provide one more additional field and then click on **Save** button.

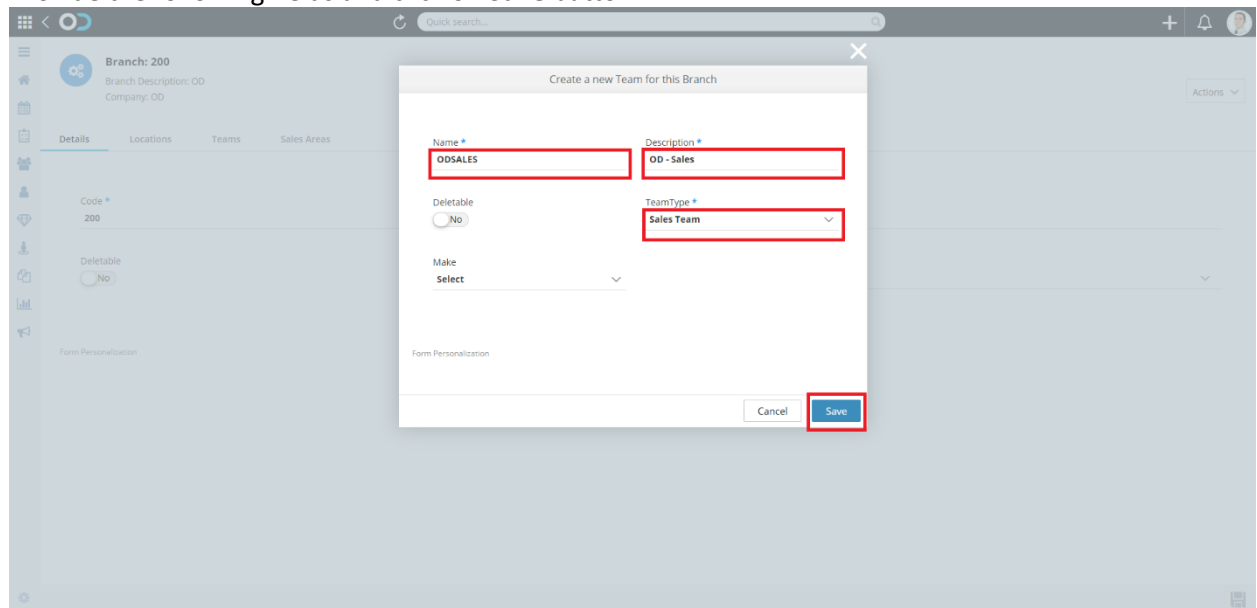


## 2.6 Add a new Team

Click on **Actions downward arrow icon** and then click on **Add a new Team to this Branch.**



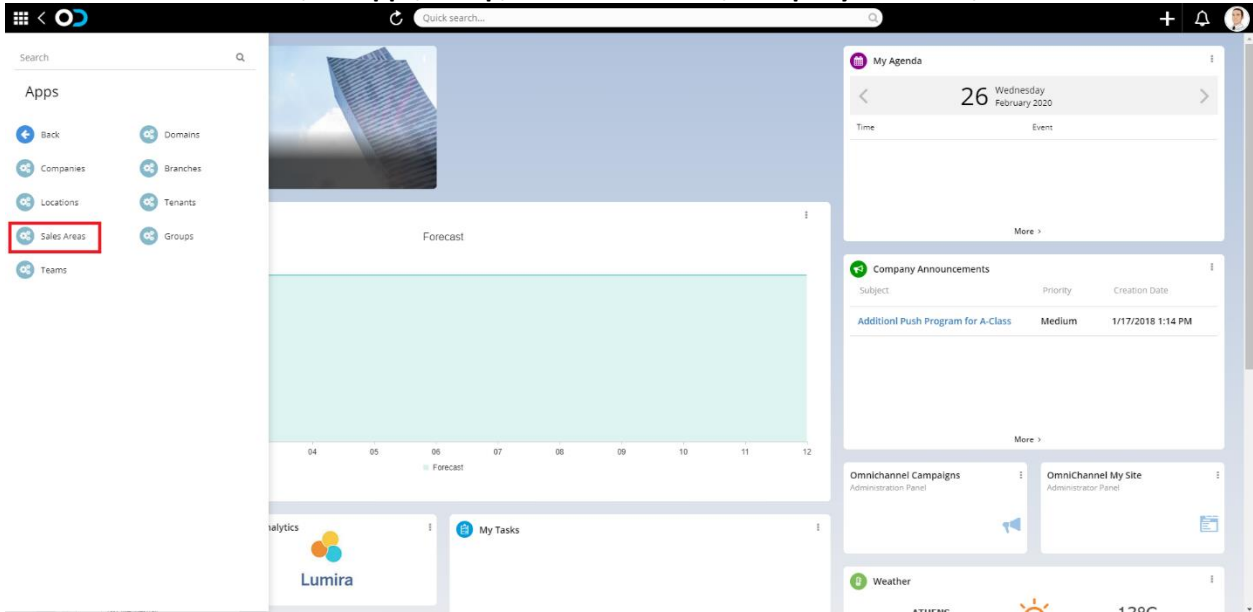
Provide the following fields and click on **Save** button.



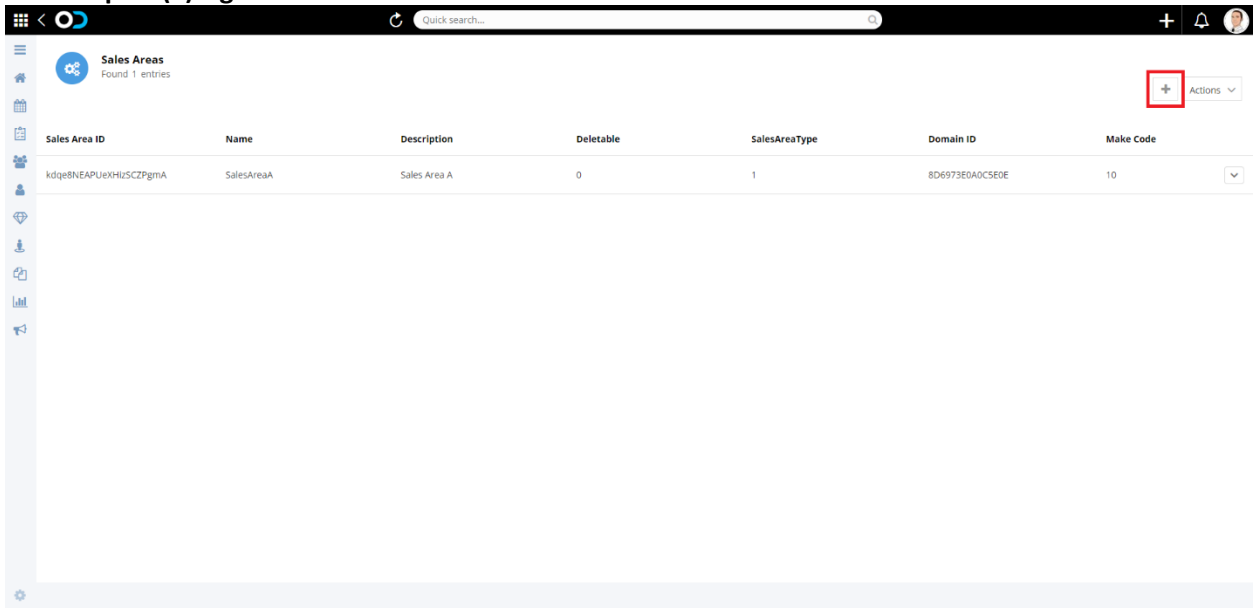


## 2.7 Add a new Sales Area

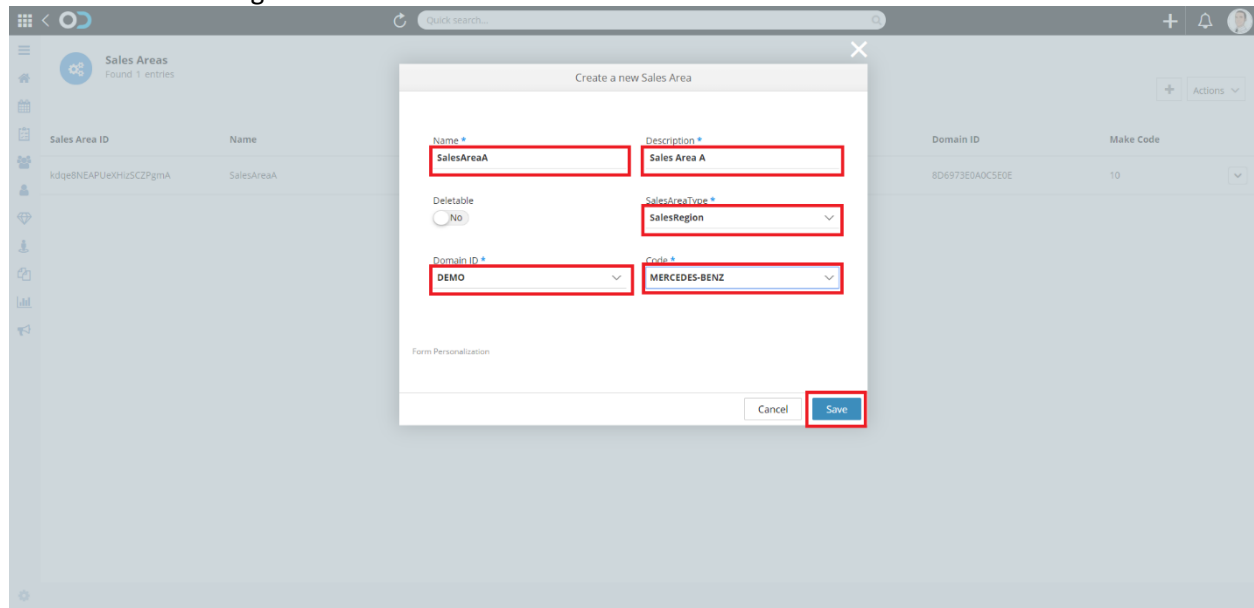
Click on **9 dot menu icon, All Apps, Setup, Common Entities, Company Structure, Sales Area**



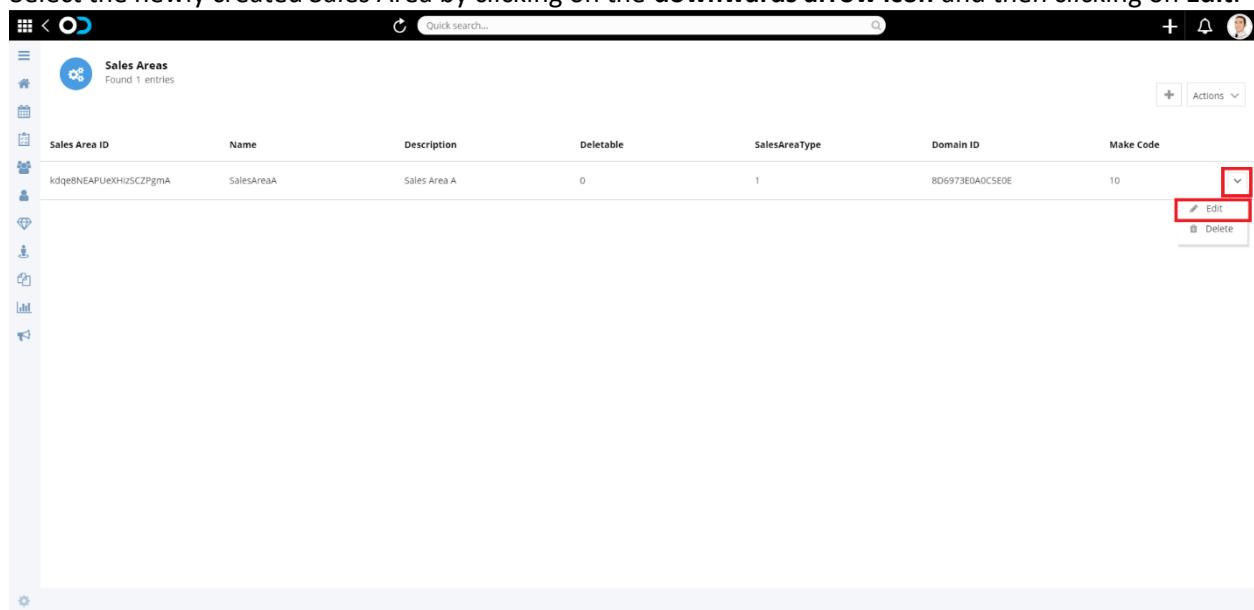
Click on **plus (+) sign icon.**



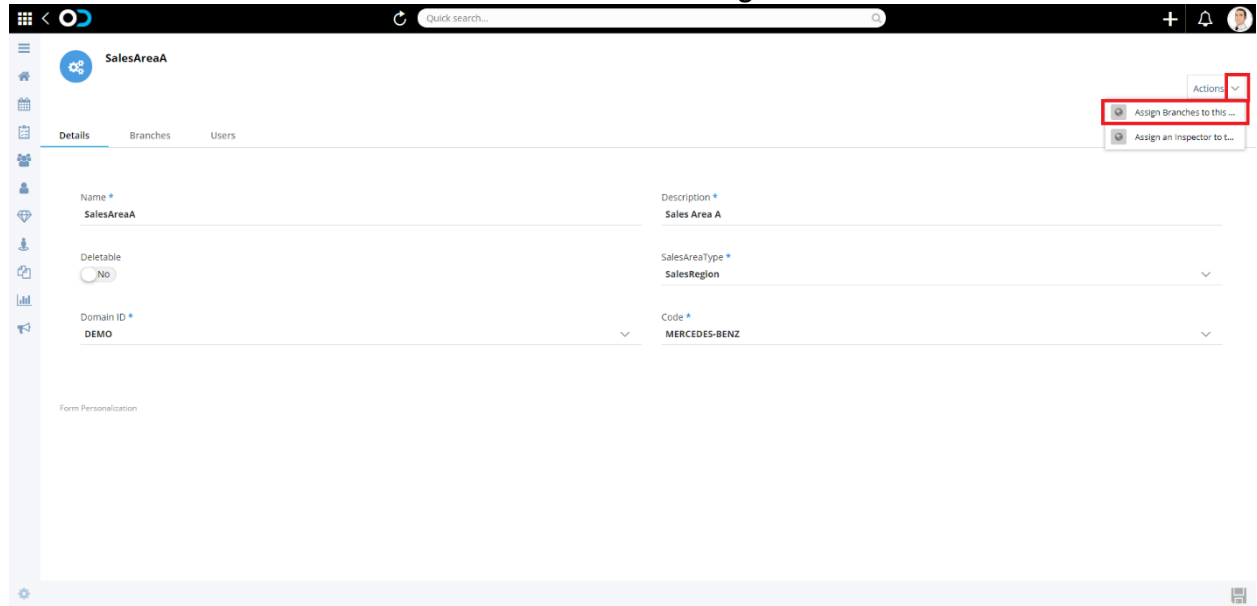
Provide the following fields and click on **Save** button.



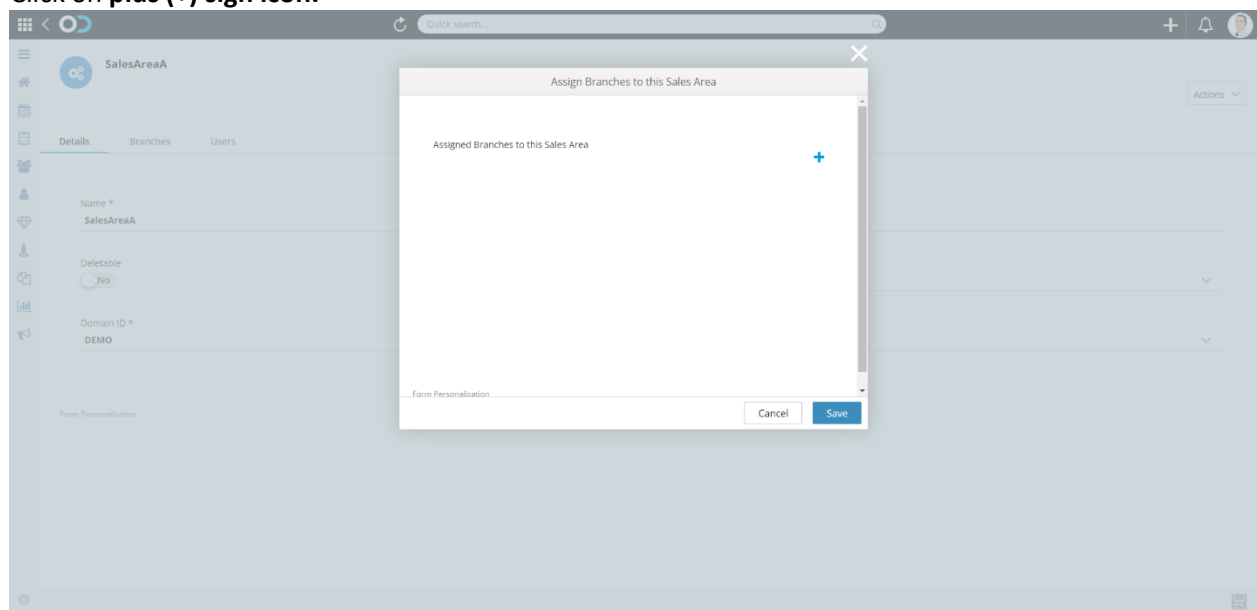
Select the newly created Sales Area by clicking on the **downwards arrow icon** and then clicking on **Edit**.



Click on **Actions** downward arrow icon and then click on **Assign Branched to this Sales Area**.



Click on **plus (+) sign icon**.



Select the Branch(es) this Sales Area has and click on **disk icon** to store the selections.

Code	Description	Company Code	Company Description
205	OD Benelux	OD	OneDealer
204	S4 Computer	OD	OneDealer
206	TGC	OD	OneDealer
207	OneDealer International	OD	OneDealer
208	Incadea	OD	OneDealer
<input checked="" type="checkbox"/> 200	OD	OD	OneDealer
201	SCG	OD	OneDealer
202	MHP	OD	OneDealer
203	KEYLAND	OD	OneDealer

Click on **Save** button to store your selections to Sales Area.

Assign Branches to this Sales Area

Assigned Branches to this Sales Area

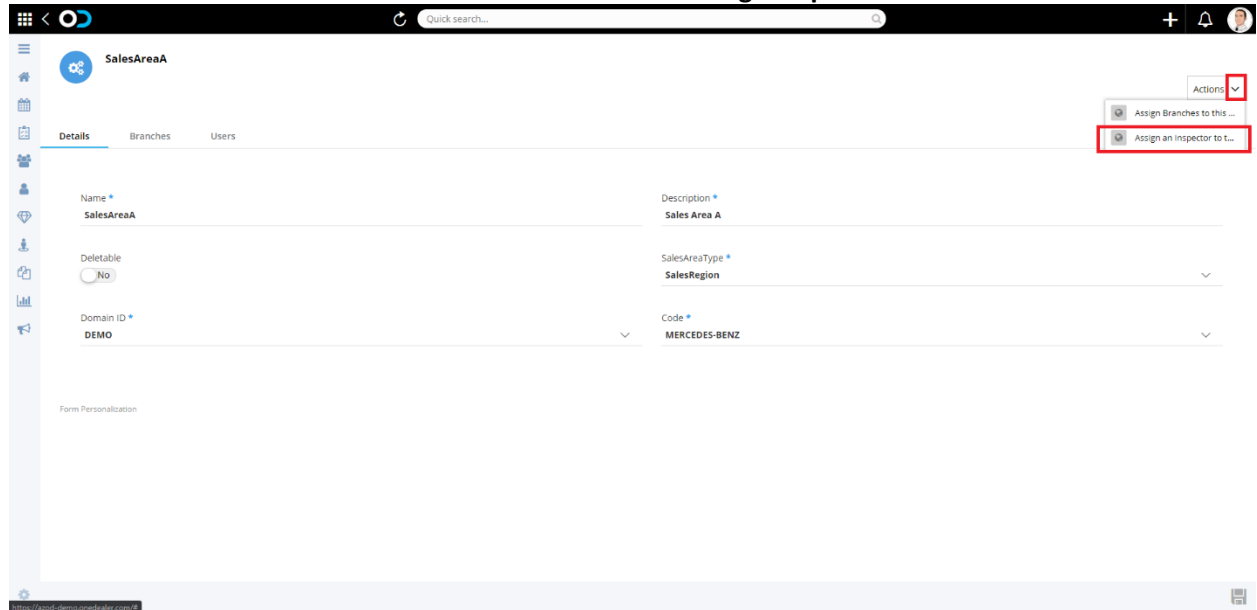
- 200

Form Personalization

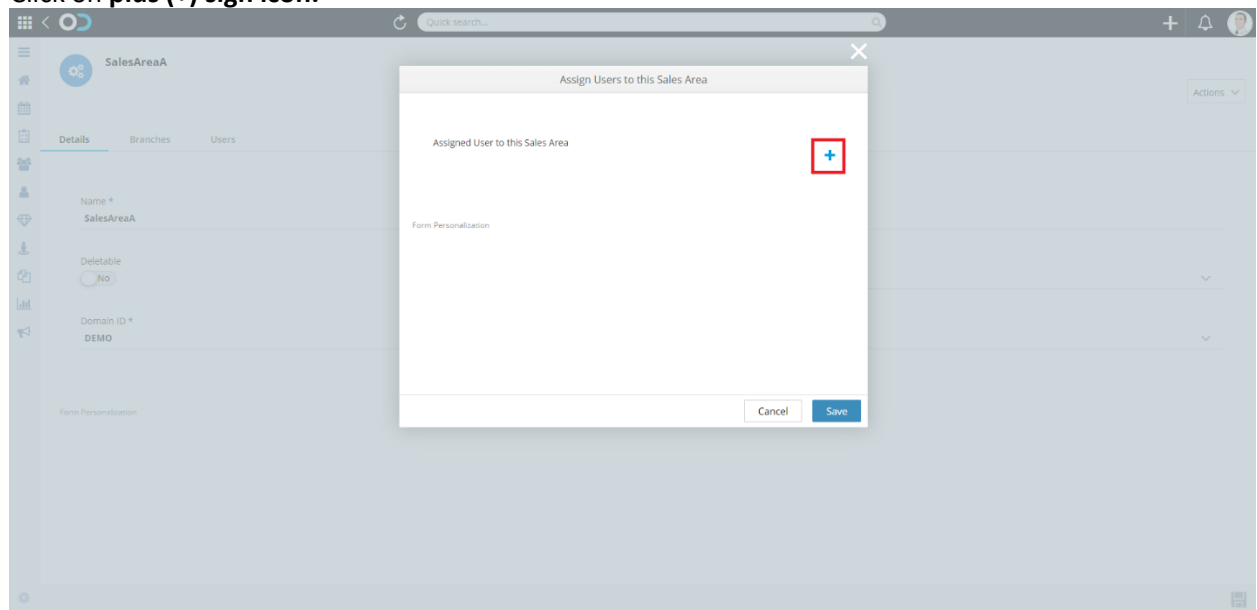
Cancel Save

## 2.8 Assign Inspector to a Sales Area

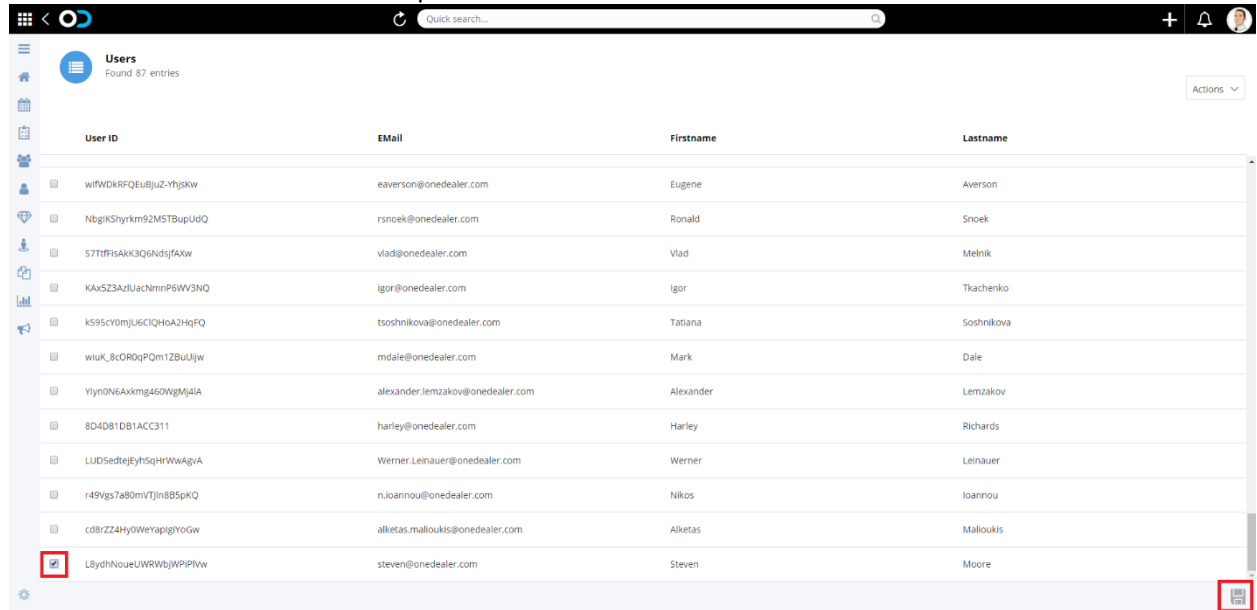
**Prerequisite:** Create a user with the role of “Sales Area Manager” and the switch “Is Inspector” on.  
Click on **Actions** downward arrow icon and then click on **Assign Inspector to this Sales Area**.



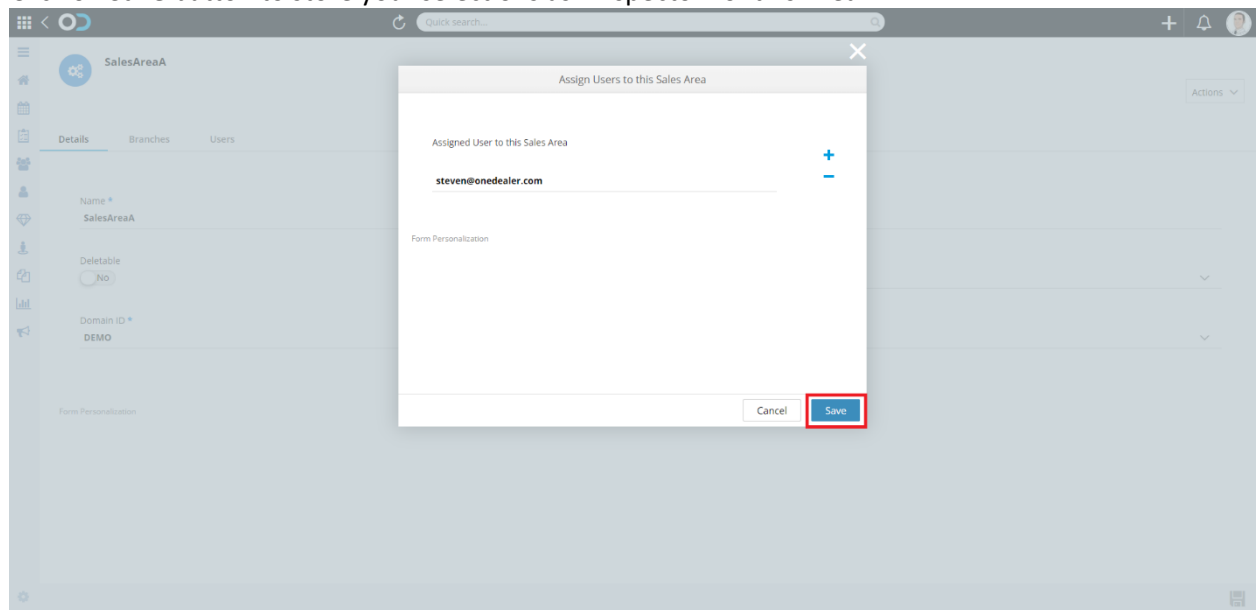
Click on **plus (+) sign icon**.



Select the user with the role of inspector and click on **disk icon** to store the selection.



Click on **Save** button to store your selections as “Inspector” of this Area.



## 2.9 Lead reception from external sources (per Branch, per Make)

The following process can be completed by two ways:

1. Using **OneDealer** platform

Click on **9 dot menu icon, All Apps, Setup, Sales & Lead, Inquiry Interest Types**

- At the filter select the **IDMS\_DEALER\_UNIT**
- Click on **plus (+) sign icon**.

Code	Name	Default Company Code	Default Branch Code	Default Location Code	Default Market Segment	Default Make	Vehicle Status	Is Default	Sales Person Code	Set Make	Set Company
8D799A725302007	8D799A725302007		208			10			115		
8D799A74E17CDF5	8D799A74E17CDF5		208			90			115		
8D799A766B4F421	8D799A766B4F421		208			91			115		
8D799A7813B9BF9	8D799A7813B9BF9		208			92			115		
8D799A7954F211E	8D799A7954F211E		208			93			115		
8D799A7A2547439	8D799A7A2547439		208			94			115		
8D799A7BB26B958	8D799A7BB26B958		208			27			115		
8D799A7CBC3C12A	8D799A7CBC3C12A		208			52			115		
8D799A7DAB5C798	8D799A7DAB5C798		208			12			115		
8D799A8425E6459	8D799A8425E6459		208			22			115		
8D799A8521CAE0A	8D799A8521CAE0A		208			15			115		

- Provide content for the following fields.

**Edit Leads Distribution**

Code:  Name:

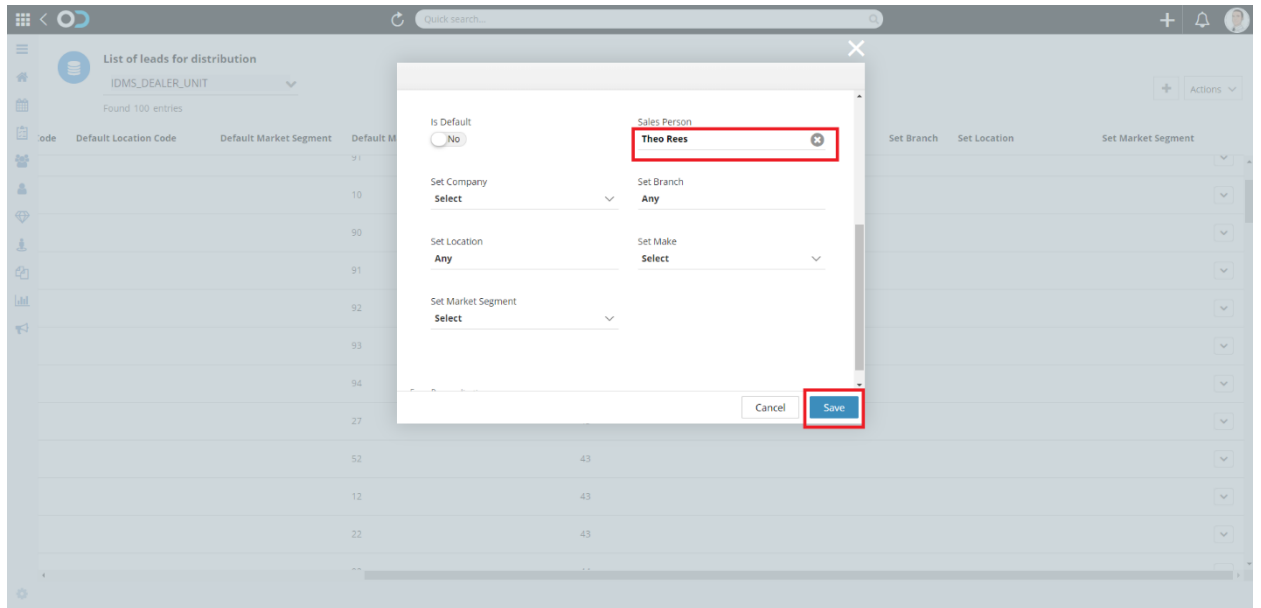
Default Company:  Default Branch:

Default Location:  Default Market Segment:

Default Make:  Vehicle Status:

Is Default:  Sales Person:

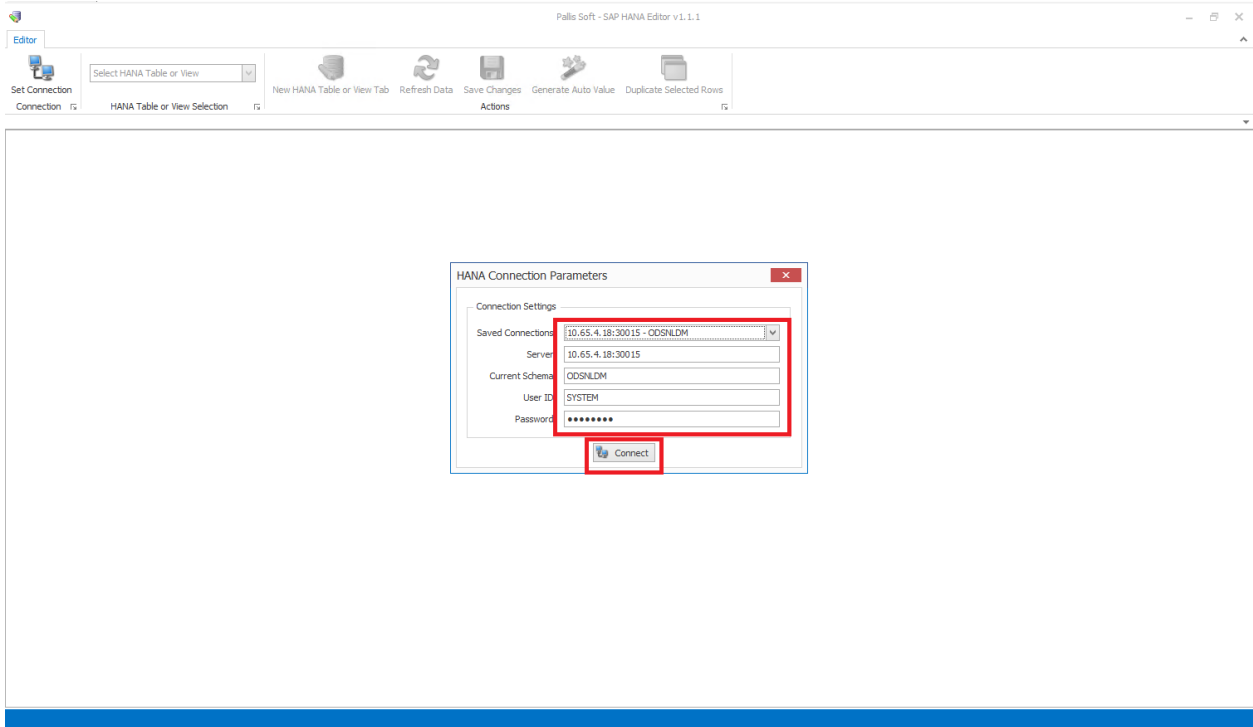
- Scroll down and provide content for one more field and then click on **Save** button.



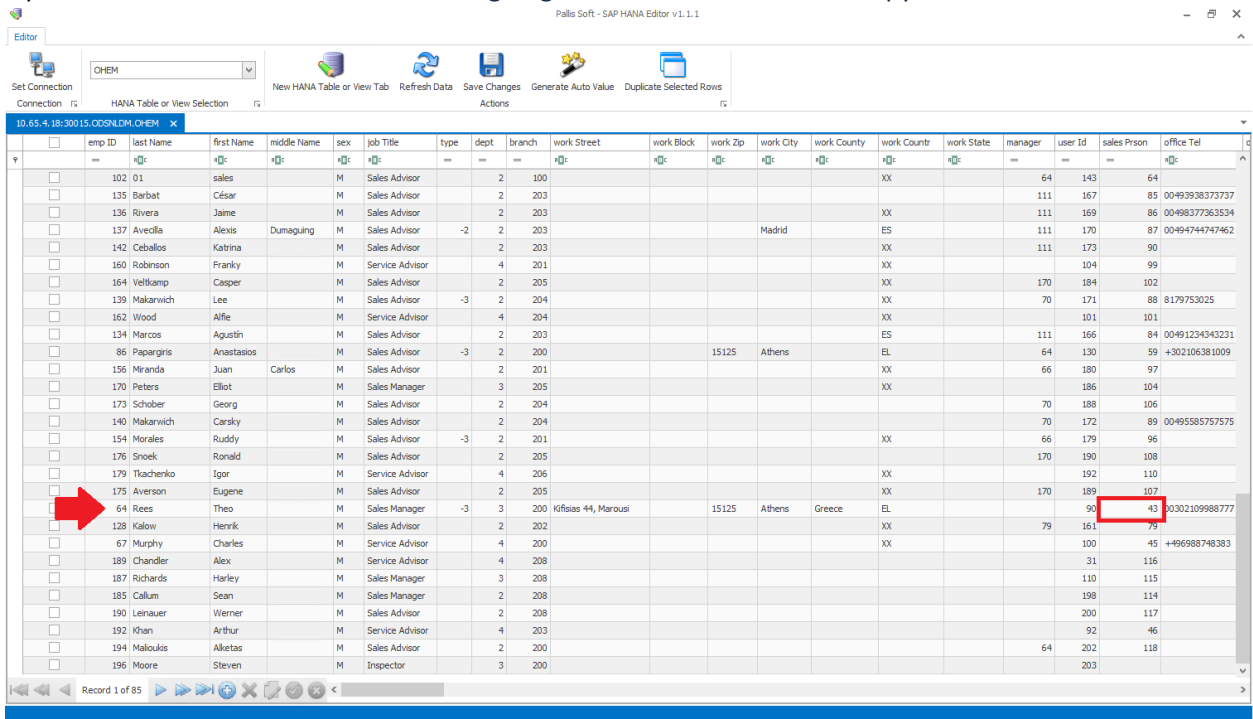
With this process we declare that “Theo Rees” will be the user who is going to receive, from an outer source like My Site, all “sales leads” concerning the make “Mercedes-Benz”. The process above must get repeated for all available makes at every branch.



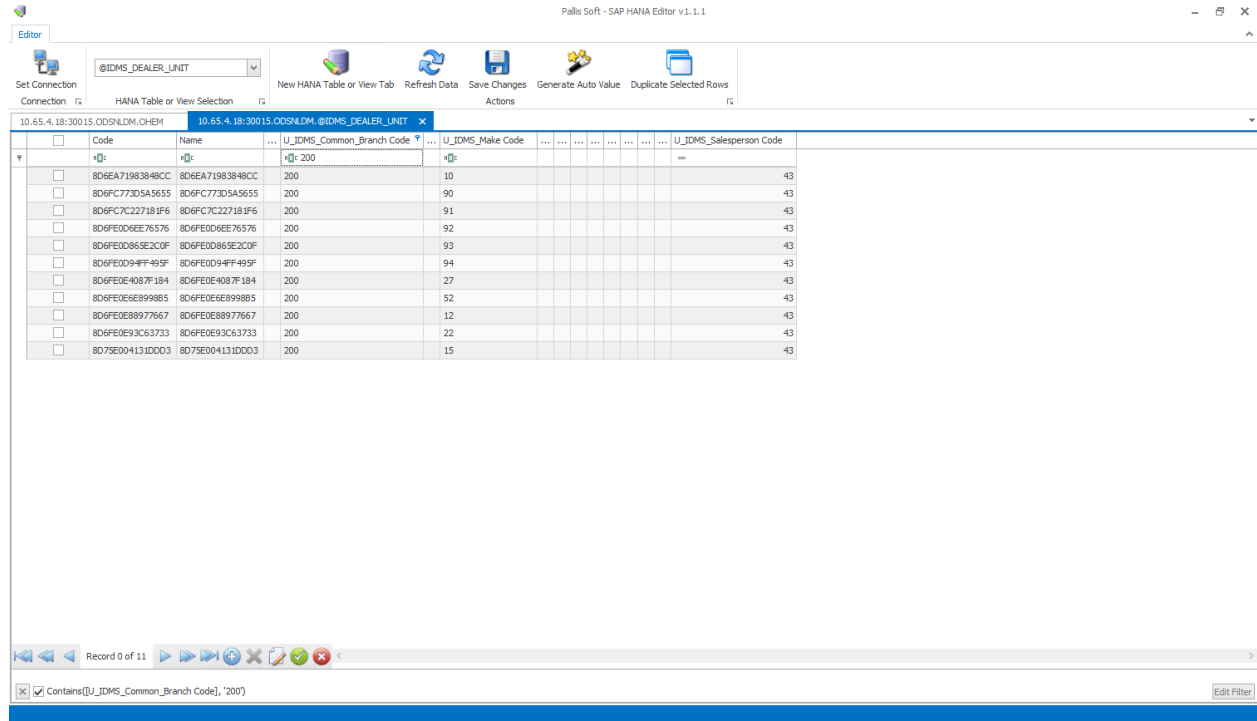
## 2. Make use of Hana Editor tool



Open **OHEM** table. Locate the user he is going to receive the Leads and copy its **“sales Prson”** code.



Open **@IDMS\_DEALER\_UNIT** table. Create for a specified branch (200) a row for every “Make” and assign the “sales Prson” code of the selected user to **U\_IDMS\_Salesperson Code** field. **In case you want the same person to receive all Leads for all brands.**



The screenshot shows the SAP HANA Editor interface. The table **@IDMS\_DEALER\_UNIT** is open, and a filter is applied: `Contains([U_IDMS_Common_Branch Code], '200')`. The table contains 11 rows of data, each representing a different 'Make' for branch 200. The columns include Code, Name, U\_IDMS\_Common\_Branch Code, U\_IDMS\_Make Code, and U\_IDMS\_Salesperson Code.

Code	Name	U_IDMS_Common_Branch Code	U_IDMS_Make Code	U_IDMS_Salesperson Code
8D6EA71983848CC	8D6EA71983848CC	200	10	43
8D6FC773D5A5655	8D6FC773D5A5655	200	90	43
8D6FC7C227181F6	8D6FC7C227181F6	200	91	43
8D6FE0D6EE76576	8D6FE0D6EE76576	200	92	43
8D6FE0D86E2C0F	8D6FE0D86E2C0F	200	93	43
8D6FE0D94FF495F	8D6FE0D94FF495F	200	94	43
8D6FE0E4087F184	8D6FE0E4087F184	200	27	43
8D6FE0E6E899885	8D6FE0E6E899885	200	52	43
8D6FE0E88977667	8D6FE0E88977667	200	12	43
8D6FE0E93C63733	8D6FE0E93C63733	200	22	43
8075E004131D003	8075E004131D003	200	15	43