



# CONFIGURATION TRAINING

YEAR 2020

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

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## CONFIGURATION TRAINING GENERIC CONFIGURATION

### 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

# GENERIC CONFIGURATION

- **Digital Sales Workplace**

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## 1 Prerequisite

Make sure that:

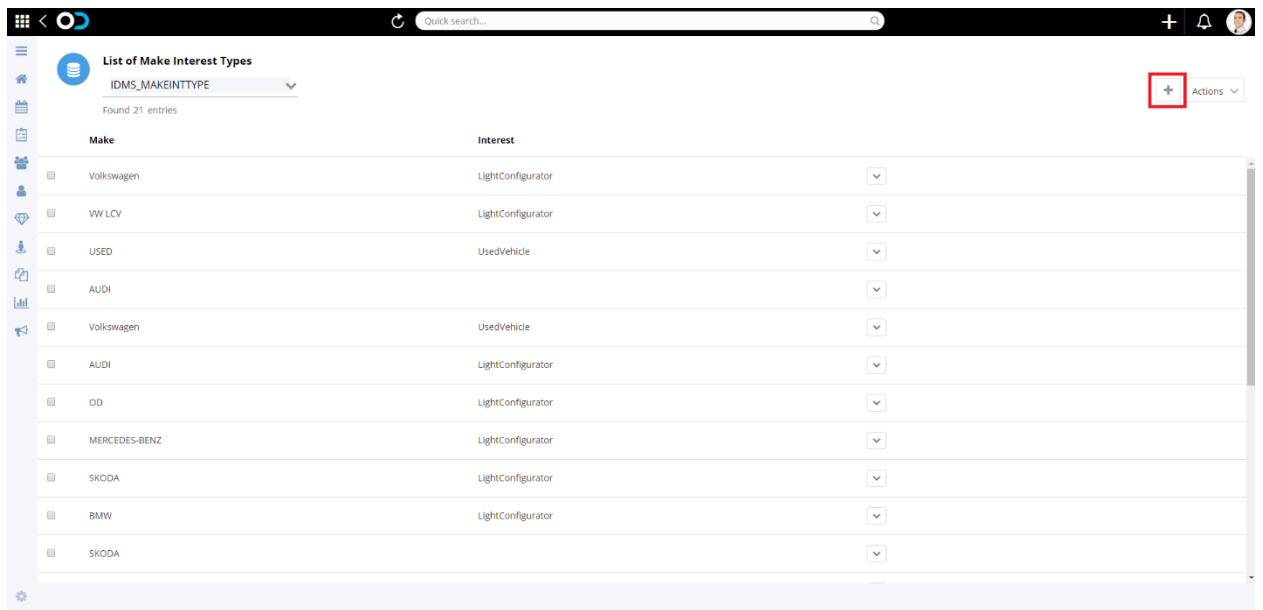
- the given user account of OneDealer has admin authorization in order to perform the following tasks.

## 2 OneDealer

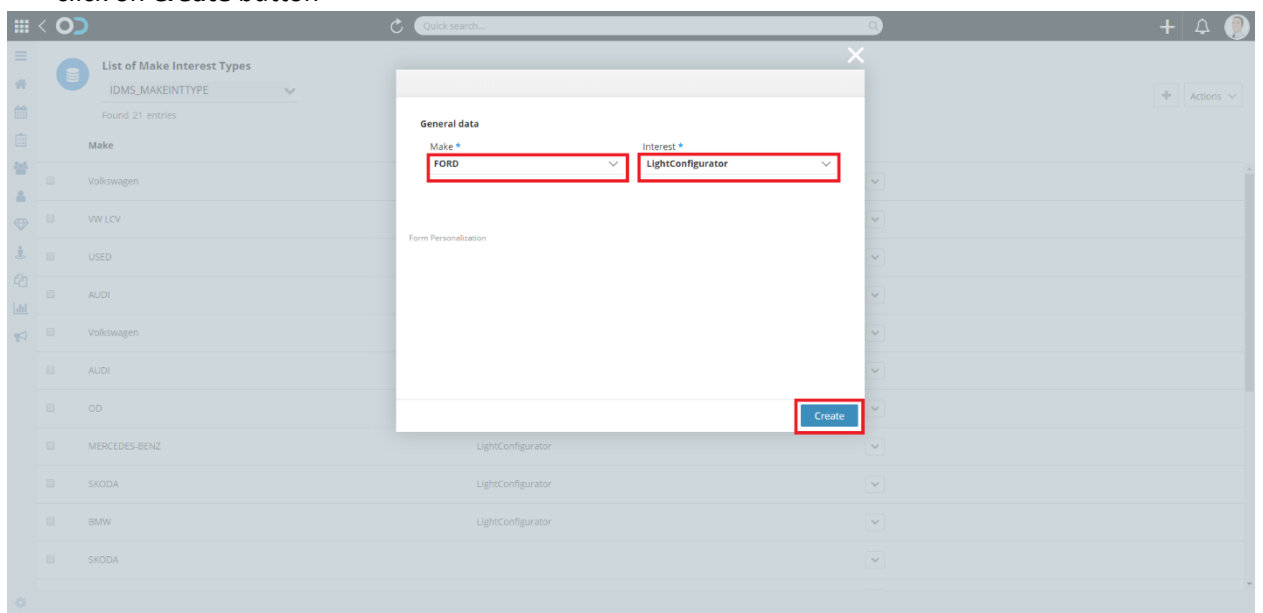
### 2.1 Create a mechanism to build or select a vehicle for the new Make (@IDMS\_MAKEINTTYPE)

Define what type of mechanism the new Make will make use to build or select a vehicle (**Make Interest Type**)

- Click on **9 dot menu icon, All Apps, Setup, Sales & Lead, Make Interest Types**
- Click on **plus (+) sign icon**.



- Provide content to the following fields according to the given data of the project and then click on **Create** button



## 2.2 Uncaching Make Interest Type

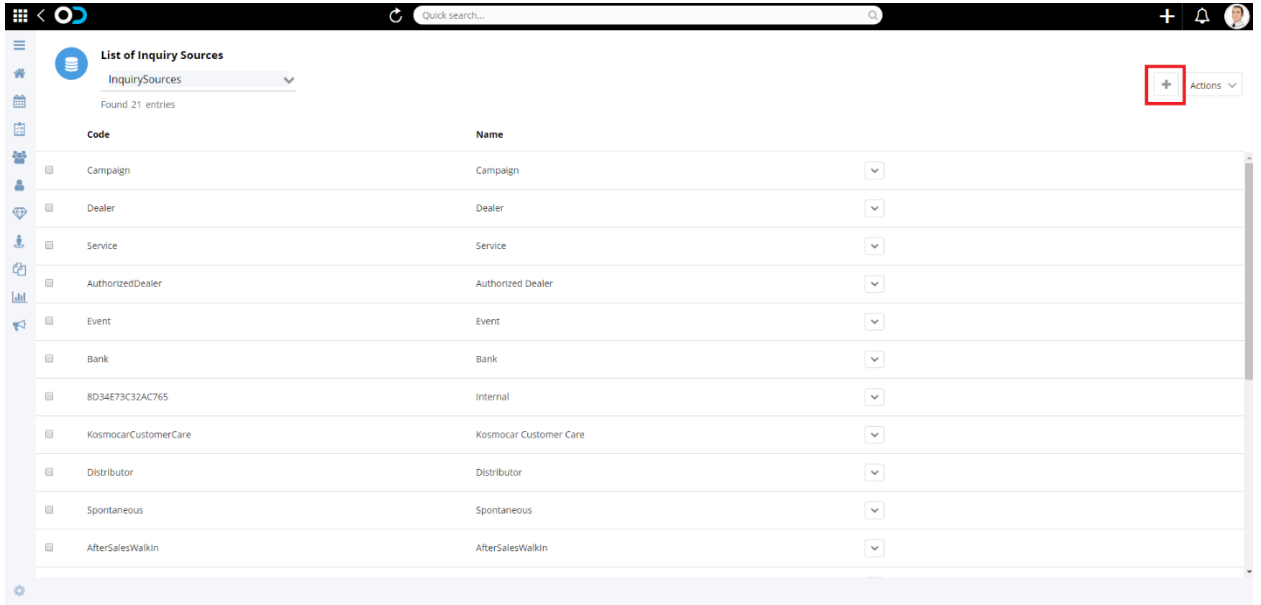
../monitor/uncachelistsearch

Find: IDMS\_MakeIntType

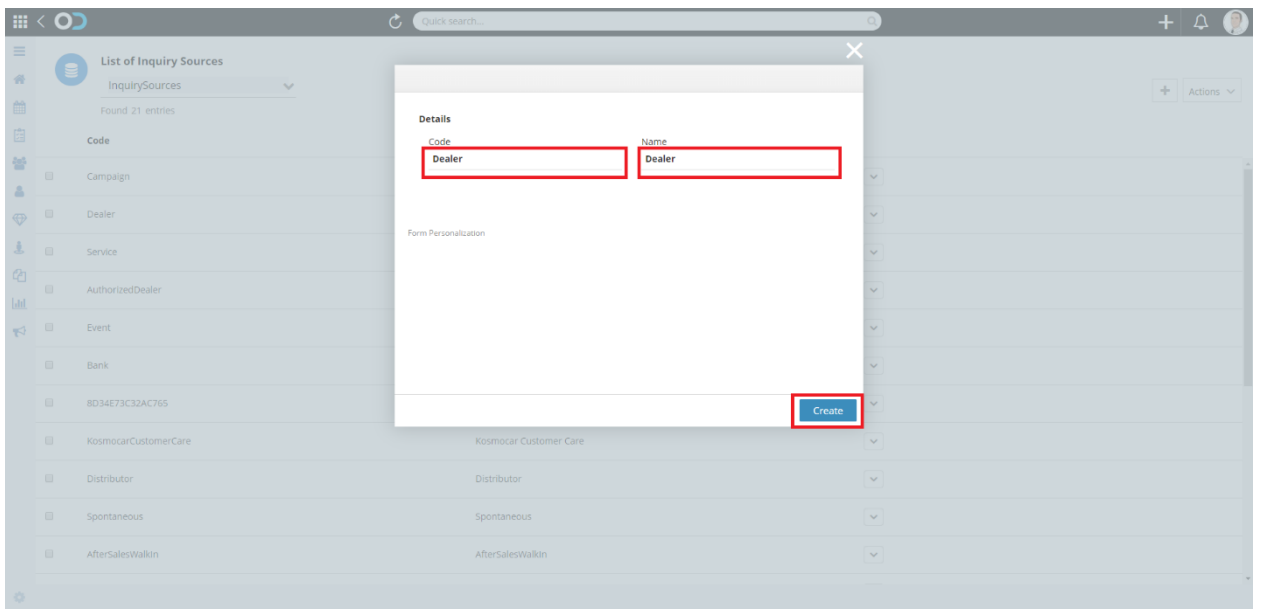
## 2.3 Assign a Workflow to the new Make

### 2.3.1 Create Sources (@IDMS\_INQ\_SOURCE)

- Click on **9 dot menu icon, All Apps, Setup, Sales & Lead, Inquiry Source**
- Click on **plus (+) sign icon**.



- Provide content to the following fields according to the given data of the project and then click on **Create** button



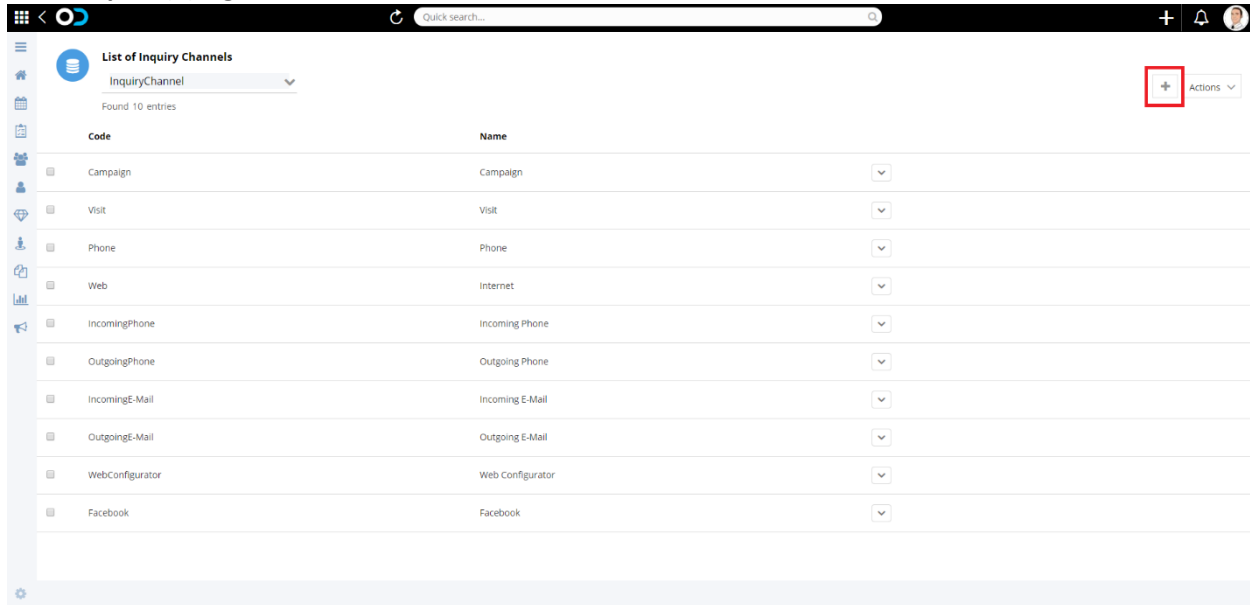
### 2.3.2 Uncaching Sources

../monitor/uncachelistsearch  
Find: IDMS\_InquirySource

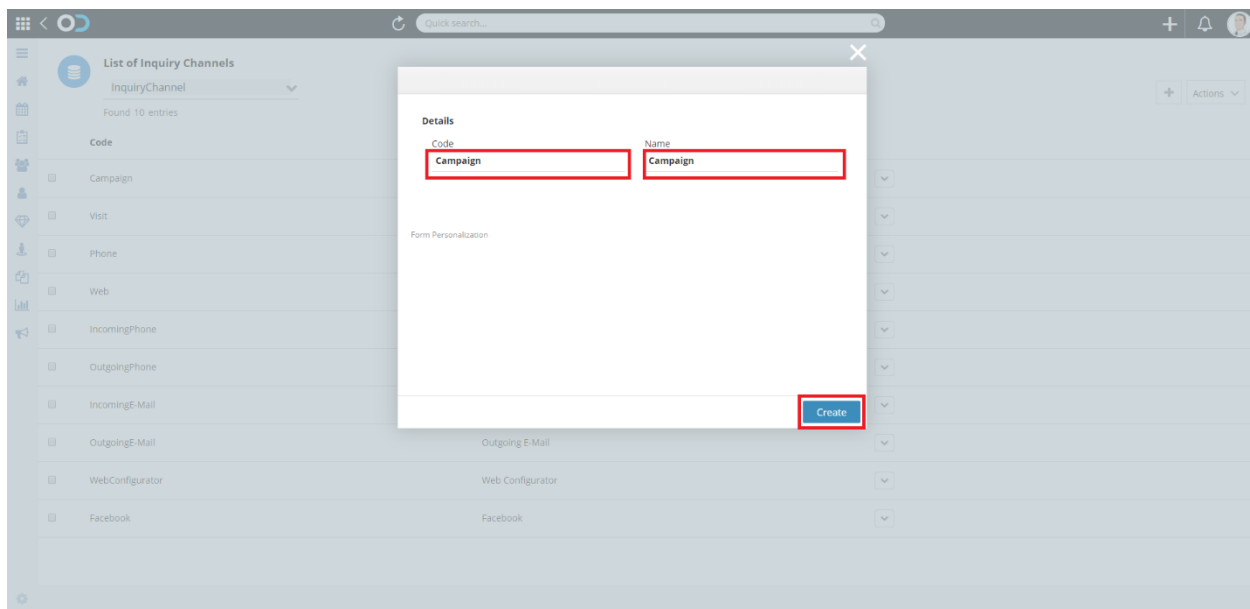


### 2.3.3 Create Channels (@IDMS\_INQUIRYCHANNEL)

- Click on **9 dot menu icon, All Apps, Setup, Sales & Lead, Inquiry Channel**
- Click on **plus (+) sign icon**.



- Provide content to the following fields according to the given data of the project and then click on **Create** button.

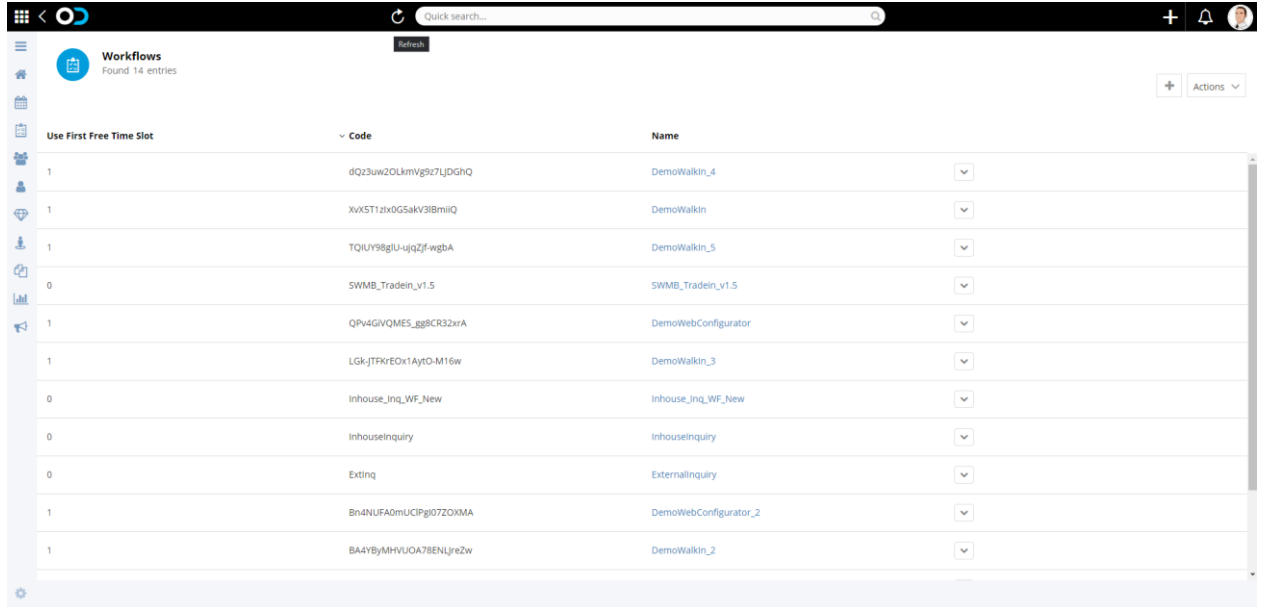


### 2.3.4 Uncaching Channels

../monitor/uncachelistsearch  
Find: IDMS\_InquiryChannel

### 2.3.5 Find the proper Workflow (@IDMS\_WF\_WORKFLOW)

- Click on 9 dot menu icon, All Apps, Setup, Workflow, Workflow List



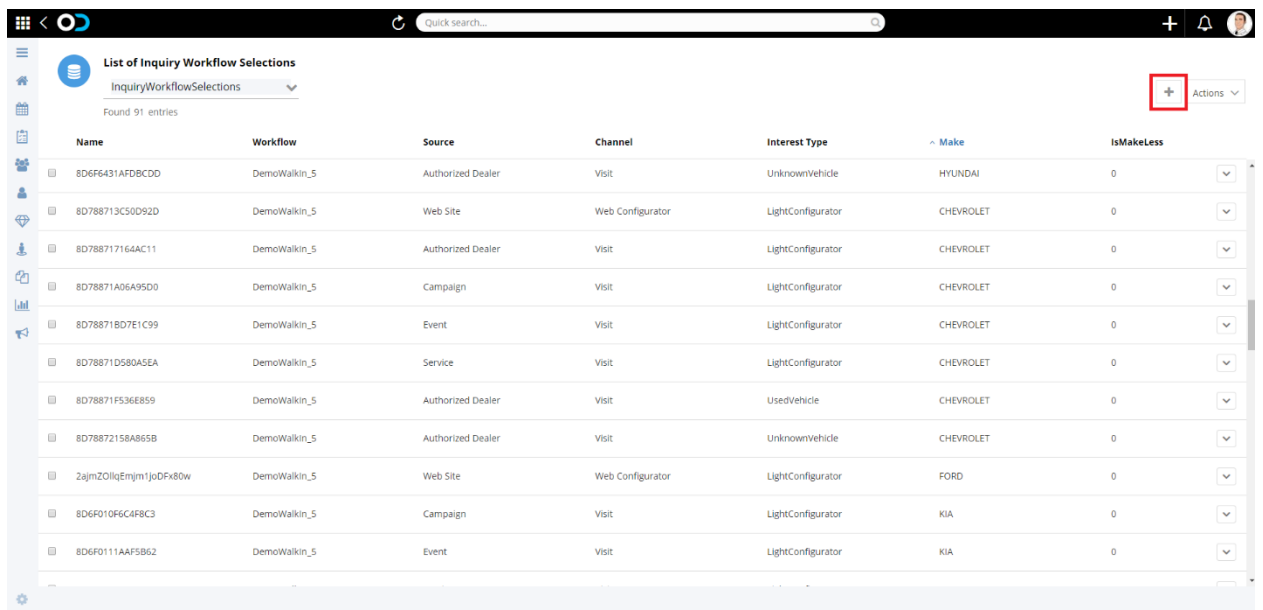
The screenshot shows the 'Workflows' section in the OneDealer application. It features a search bar at the top with the text 'Quick search...' and a 'Refresh' button. Below the search bar, there is a table with 14 entries. The table has three main columns: 'Use First Free Time Slot', 'Code', and 'Name'. Each row also includes a dropdown arrow on the right side. The table is titled 'Workflows' and indicates 'Found 14 entries'. On the right side of the table, there are '+', 'Actions', and a dropdown arrow.

Use First Free Time Slot	Code	Name
1	dQz3uwZOLkmVg9z7UJdGHQ	DemoWalkin_4
1	XvXST1zix0GSakV3lBmiIQ	DemoWalkin
1	TQIUy98glU-hjqZjf-wgbA	DemoWalkin_5
0	SWMB_Tradein_v1.5	SWMB_Tradein_v1.5
1	QPv4GIVQME5_gg8CR3zxrA	DemoWebConfigurator
1	LGk-jTRkEOx1AytO-M16w	DemoWalkin_3
0	Inhouse_Inq_WF_New	Inhouse_Inq_WF_New
0	InhouseInquiry	InhouseInquiry
0	Extinq	Externalinquiry
1	Bn4NUFA0mUCIPgi07ZOXMA	DemoWebConfigurator_2
1	BA4YByMHVUOA78ENLjreZw	DemoWalkin_2

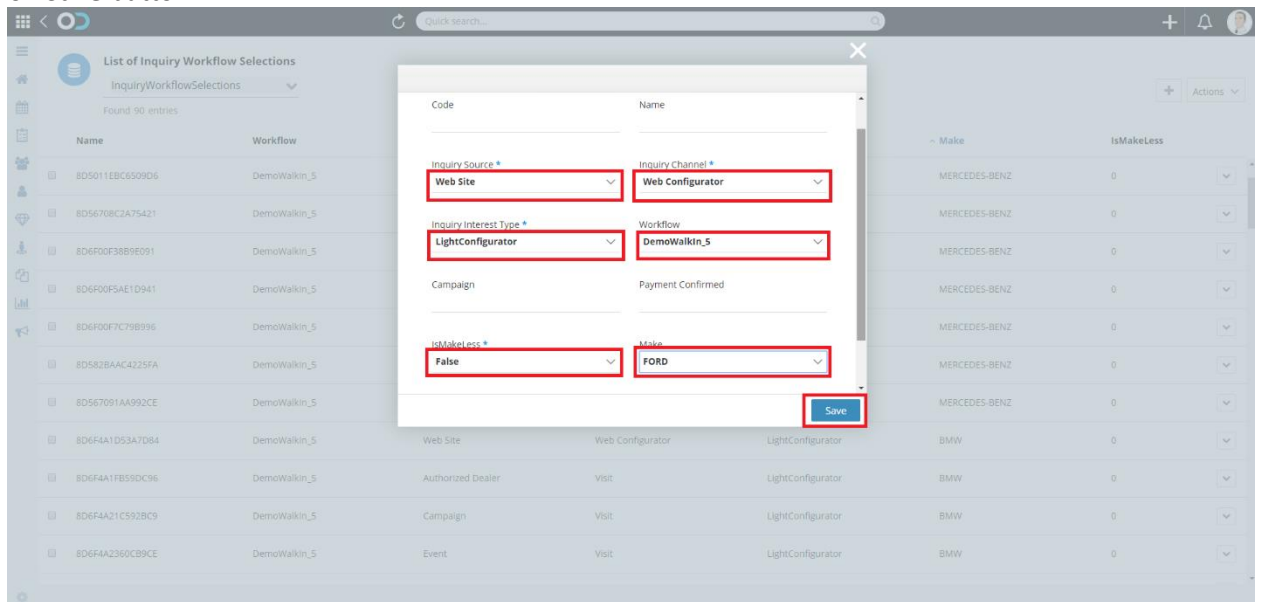
### 2.3.6 Create an Inquiry Workflow Selection (@IDMS\_WF\_SELECTION)

Create an inquiry workflow selection entry by selecting: a Workflow, a Sources, a Channel, an Interest Type and a Make.

- Click on **9 dot menu icon, All Apps, Setup, Sales & Lead, Inquiry Workflow Selections**
- Click on **plus (+) sign icon**.



Provide content to the following fields according to the given data of the project and then click on **Save** button.



### 2.3.7 Uncaching Workflow Selection

../monitor/uncachelistsearch  
Find: IDMS\_WF\_Selection

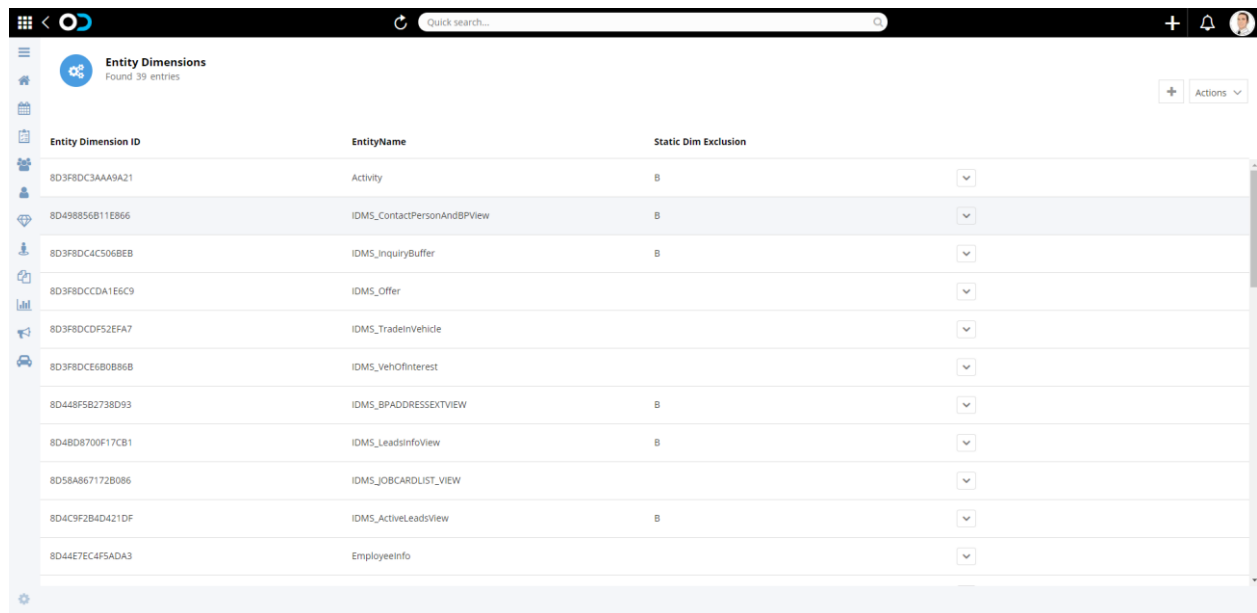
## 2.4 Entity Dimensions

By this selection you configure the scope of entities. When you do not make any choice then the scope is being configured by the user’s dimensions.

- Click on 9 dot menu icon, All Apps, Setup, Common Entities, Permission Setup, Entity Dimensions

B: Branch

C: Company



Entity Dimension ID	EntityName	Static Dim Exclusion
803F8DC3AAA9A21	Activity	B
80498856B11E886	IDMS_ContactPersonAndBPView	B
803F8DC4C506BEB	IDMS_InquiryBuffer	B
803F8DCCDA1E6C9	IDMS_Offer	B
803F8DCDF52EFA7	IDMS_TradeInVehicle	B
803F8DCE6B0B86B	IDMS_VehOfInterest	B
80448F5B2738D93	IDMS_BPADDRESSEXVIEW	B
8048D8700F17CB1	IDMS_LeadsInfoView	B
8058A867172B086	IDMS_JOBCARDLIST_VIEW	B
804C9F2B4D421DF	IDMS_ActiveLeadsView	B
8044E7EC4F5ADA3	EmployeeInfo	B