

CONFIGURATION TRAINING YEAR 2020

OneDealer International GmbH www.onedealer.com

This document contains commercially sensitive and confidential information of OneDealer International GmbH and is the subject of copyright owned by or licensed to OneDealer International GmbH. Except with prior written consent of OneDealer International GmbH, the contents of this document shall not be used, copied, reproduced or disclosed other than as is strictly necessary for the direct evaluation of OneDealer International GmbH Proposal. Disclosure for such purpose shall be on a confidential basis and limited to



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

OneDealer International GmbH | www.onedealer.com Wallersheimer Weg 50-58 Koblenz, Germany

Page 2 of 11



Contents

<u>1</u>	PREREQUISITE	4
<u>2</u>	ONEDEALER	<u>5</u>
2.1	CREATE A MECHANISM TO BUILD OR SELECT A VEHICLE FOR THE NEW MAKE (@IDMS_MAKEINTTYPE)	5
2.1.1	UNCACHING MAKE INTEREST TYPE	6
2.2	ASSIGN A WORKFLOW TO THE NEW MAKE	7
2.2.1	CREATE SOURCES (@IDMS_INQ_SOURCE)	7
2.2.2	UNCACHING SOURCES	7
2.2.3	CREATE CHANNELS (@IDMS_INQUIRYCHANNEL)	8
2.2.4		8
2.2.5	FIND THE PROPER WORKFLOW (@IDMS_WF_WORKFLOW)	9
2.2.6	CREATE AN INQUIRY WORKFLOW SELECTION (@IDMS_WF_SELECTION)	10
2.2.7	UNCACHING WORKFLOW SELECTION	10
2.3	ENTITY DIMENSIONS	11



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**.

	< 0		k search	Q	+ 🗘 🌔
=		List of Make Interest Types			_
*		IDMS_MAKEINTTYPE 🗸			+ Actions ~
		Found 21 entries			
Ē		Make	Interest		
**		Volkswagen	LightConfigurator	v	Î
		WI LCV	LightConfigurator	v	
1		USED	UsedVehicle	v	
C2		AUDI		v	
1		Volkswagen	UsedVehicle	v	
		AUDI	LightConfigurator	v	
		OD	LightConfigurator	v	
		MERCEDES-BENZ	LightConfigurator	v	
		SKODA	LightConfigurator	v	
		BMW	LightConfigurator	v	
		SKODA		v	
0					

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

	< 00		Quick search		🖸 🛛 + 🗘 🥬
≡ #	8	List of Make Interest Types IDMS_MAKEINTTYPE V		×	+ Actions ~
		Found 21 entries	General data Make *	Interest *	
*			FORD	LightConfigurator	
•			Form Personalization		
3 (21					
		AUDI			v
					~
		AUDI			×
				Create	
					×
		SKODA			v
					v

OneDealer International GmbH | www.onedealer.com Wallersheimer Weg 50-58 Koblenz, Germany



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

C	Click on plus (+) sign ic	on.		
	List of Inquiry Sources InquirySources Found 21 entries	Quick search	۹,	+ A
	Code	Name		
	Campaign	Campaign	~	
	Dealer	Dealer	~	
	Service	Service	~	
•	AuthorizedDealer	Authorized Dealer	~	
	Event	Event	~	
	Bank	Bank	~	
	8D34E73C32AC765	Internal	~	
	KosmocarCustomerCare	Kosmocar Customer Care	~	
	Distributor	Distributor	~	
	Spontaneous	Spontaneous	~	
	AfterSalesWalkin	AfterSalesWalkIn	~	

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

	< 0	2	C Quick search		o + 4 🥬
= #		List of Inquiry Sources		×	the Artions of
			Details		
		Code	Code	Name	
		Campaign	Dealer	Dealer	
		Dealer			v
<u>.</u>		Service	Form Personalization		
		AuthorizedDealer			
		Bank			v
		8D34E73C32AC765		Create	Y .
					v
					v
					v
		AfterSalesWalkin	AfterSalesWalkin		v

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

List of Inquiry Channels InquiryChannel			
Found 40 option			+ Actions ~
Found 10 entries	Name		
Campaign	Campaign	×	
visit	Visit	V	
Phone	Phone	×	
Neb	Internet	×	
ncomingPhone	Incoming Phone	×	
OutgoingPhone	Outgoing Phone	V	
ncomingE-Mail	Incoming E-Mail	×	
OutgoingE-Mail	Outgoing E-Mail	×	
WebConfigurator	Web Configurator	×	
Facebook	Facebook	~	

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

	< 0		Quick search		🗅 🕂 🗘 🌔
=		List of Inquiry Channels		×	+ Artions V
		Found 10 entries	Details		
**		Campaign	Code Campaign	Name Campaign	(v)
			Form Personalization		 Image: A start of the start of
1 (2)		Phone			 Image: Second sec
		Web			
		IncomingPhone			
		OutgoingPhone			
			Outroing 5-Mail	Create	
					 Image: Second sec
		Facebook	Facebook		×

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

	< ••	Quick search	Q	+ 🗘 🌻
=	Workflows Found 14 entries	Retrects		+ Actions V
	Use First Free Time Slot	~ Code	Name	
*	1	dQz3uw2OLkmVg9z7LJDGhQ	DemoWalkin_4	v
\odot	1	XvX5T1zIx0G5akV3lBmiiQ	DemoWalkin	v
	1	TQIUY98gIU-ujqZJf-wgbA	DemoWalkin_5	v
65 1	0	SWMB_Tradein_v1.5	SWMB_Tradein_v1.5	v
	1	QPv4GiVQMES_gg8CR32xrA	DemoWebConfigurator	v
	1	LGk-JTFKrEOx1AytO-M16w	DemoWalkin_3	v
	0	Inhouse_Inq_WF_New	Inhouse_Inq_WF_New	v
	0	InhouseInquiry	InhouseInquiry	v
	0	Exting	ExternalInquiry	v
	1	Bn4NUFA0mUCIPgI07ZOXIMA	DemoWebConfigurator_2	v
	1	BA4YByMHVUOA78ENLJreZw	DemoWalkin_2	▼
0				_



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.

₩ <	С			Quick search		a,		+	۵ 🥘
=		List of Inquiry Workflo	w Selections						-
#		Found 91 entries						+	Actions ∨
ß		Name	Workflow	Source	Channel	Interest Type	^ Make	IsMakeLess	
**		8D6F6431AFDBCDD	DemoWalkin_5	Authorized Dealer	Visit	UnknownVehicle	HYUNDAI	0	~
●		8D788713C50D92D	DemoWalkin_5	Web Site	Web Configurator	LightConfigurator	CHEVROLET	0	~
1		8D788717164AC11	DemoWalkin_5	Authorized Dealer	Visit	LightConfigurator	CHEVROLET	0	~
2		8D78871A06A95D0	DemoWalkin_5	Campaign	Visit	LightConfigurator	CHEVROLET	0	~
		8D78871BD7E1C99	DemoWalkIn_5	Event	Visit	LightConfigurator	CHEVROLET	0	~
		8D78871D580A5EA	DemoWalkin_5	Service	Visit	LightConfigurator	CHEVROLET	0	~
		8D78871F536E859	DemoWalkin_5	Authorized Dealer	Visit	UsedVehicle	CHEVROLET	0	~
		8D78872158A865B	DemoWalkin_5	Authorized Dealer	Visit	UnknownVehicle	CHEVROLET	0	~
		2ajmZOllqEmjm1joDFx80w	DemoWalkin_5	Web Site	Web Configurator	LightConfigurator	FORD	0	~
		8D6F010F6C4F8C3	DemoWalkin_5	Campaign	Visit	LightConfigurator	KIA	0	~
		8D6F0111AAF5B62	DemoWalkin_5	Event	Visit	LightConfigurator	KIA	0	~
						· · · ·			

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

	< (\sim		C Quicksearch		0			- 🗘 🌔
*		List of Inquiry Work	flow Selections	Code	Name	× •		+	
		Name	Workflow				~ Make	IsMakeLess	
- 10			DemoWalkin_5	Inguiry Source * Web Site	V Web Configurate	r v			Y
•				Inquiry Interest Type *	Workflow		MERCEDES-BENZ		~
4				LightConfigurator	DemoWalkIn_5	~			~
		8D6F00F5AE1D941	DemoWalkin_5	Campaign	Payment Confirme	d			×
1		8D6F00F7C79B996	DemoWalkin_5	International and the	Maka				Y
		8D582BAAC4225FA		False	FORD	~			×
						Save			~
			DemoWaikin_5	Web Site	Web Configurator	LightConfigurator			~
		8D6F4A1FBS9DC96		Authorized Dealer					×
			DemoWaikin_5				BMW		~
			DemoWalkin_5	Event					×

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

		Quick search		Q	+ 🗘 🌘
≡ #	Cost Entity Dimensions Found 39 entries				+ Actions ~
ġ	Entity Dimension ID	EntityName	Static Dim Exclusion		
*	8D3F8DC3AAA9A21	Activity	В	¥	*
\	8D498856B11E866	IDMS_ContactPersonAnd8PView	В	~	
1	8D3F8DC4C506BEB	IDMS_InquiryBuffer	В	v	
een Laat	8D3F8DCCDA1E6C9	IDMS_Offer		~	
	8D3F8DCDF52EFA7	IDMS_TradeInVehicle		~	
⇔	8D3F8DCE6B0B86B	IDM5_VehOfinterest		v	
	8D448F5B2738D93	IDMS_BPADDRESSEXTVIEW	В	~	
	8D4BD8700F17CB1	IDMS_LeadsInfoView	В	v	
	8D58A867172B086	IDMS_JOBCARDLIST_VIEW		v	
	8D4C9F2B4D421DF	IDMS_ActiveLeadsView	В	v	
	8D44E7EC4F5ADA3	EmployeeInfo		Y	
•					¥