

Web Based User Interface for Service Advisors: Making Service Advisors' Life Easier



Applies to:

SAP for Automotive. For more information, visit [SAP for Automotive on BPX](#)

Summary

A lot of feedback we have received from customers for previous versions of DBM addresses the simplicity of the transactions and the usability of the screens for workshop personal. With DBM 7.0 we have conducted extensive research in this area and worked with some of our strategic customers to see how their employees are using DBM and what can be improved.

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Author Bio

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Web Based User Interface for Service Advisors: Making Service Advisors' Life Easier (New within DBM 7.0)

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It is one thing that process requirements at dealerships are of a highly integrative nature and the typical expectation on SAP software is that these requirements are met in real-time which adds to the complexity of business transactions. Feedback of many customers on previous versions was that DBM is able to hide the complexity of integrated processes in a good way. Take a customer invoice for example, the system needs to select only the relevant parts and labor values and not those assigned to a warranty claim or internal service. Then the right price has to be selected taking into account all discounts the customer is expecting. After that has been done, the accounting department has to be informed that there is money to be collected and a printout has to be triggered for the customer to check. As far as the service advisor is concerned, all he needs to do is press on a single button and collect the invoice at the printer.

The other thing is that service advisors, mechanics and other users at the dealership really don't want to spend much more time with a computer than they have to and rather prefer spending time with customers or repairing vehicles. So the question we were asking ourselves is how functionality and smarter screens can further improve usability and therefore efficiency of people working in dealerships. In many emerging markets, employee fluctuation is an issue for many dealerships particularly for those of premium brands. Therefore dealers are required to bring on new employees and train them in order to get them up to speed quickly. The expectation is clearly that training for service advisors on the system they are using can be completed in a few hours rather than days.

With all this in mind there are the following improvements we came up with in DBM 7.0:

Guided Procedure for Appointment Booking

With customers on a phone service advisor or service are now guided through the appointment booking procedure. After confirming customer and vehicle the system provided the service relevant customer and vehicle details credit limit, last services (order and quotations), recalls, warranties and maintenance information and storage goods.

Vehicle-Customer-Quick-Info: KA-SC-002 [Help](#)

VIN: YXCVBNNM87562745234823
 Division: BMW Sales Code: BM_528i Model: BMW 528i Model Year: 0000 Exterior Color: Initial Reg.: 20080715
 Customer: Berta Dudenhofer Last Service Date: 00.00.0000

[Create Appointment](#) [Create Order](#) [Create Quotation](#) [Close](#) [Refresh](#) You can also

Customer Info/Texts/Orders | [Recalls/Defects/Check Intervals](#) | [Warranties/Storage Goods/Notifications](#)

Sold-to-Party: [Berta Dudenhofer](#) Customer text:
 Address: Bahnhofstr 117, 69190 Walldorf
 Telephone/Mobil: 06227-8765 / 0151-9876543
 E-mail: Berta.Dudenhofer@t-online.de [Show address](#)
 Credit Limit: Credit limit check inactive
 Payment Terms: Payable immediately Due net [View creditinfo](#) Vehicle text:

Orders

[Order Change](#)

Order / Job	Document Date	Changed on	Service Advisor	Inspection	Counter reading	CCounter unit	Status
10001009 Service Workshop	12.04.2010	12.04.2010	Gerhard Service		101.000	KM	Planned
Job 1 - Engine Wash Est Time							
10000984 Service Workshop	07.04.2010	07.04.2010	Gerhard Service		101.000	KM	Planned
Job 1 - Winter Check							
Job 2 - Inspection big							
10000983 Service Workshop	07.04.2010	07.04.2010	Gerhard Service		99.999	KM	Released

Quotations

[Copy](#) [Change](#)

Quotations / Jobs	Copy	Document Date	Service Advisor	Net value	Doc. Currency	Valid From	Valid To	Validity	Status
10000736 Service Quotation	<input type="checkbox"/>	11.01.2010							New

The guided procedure contains seven steps until the final booking is done.

1. General data, where the main order details are maintained like counter reading order reason.

Create Appointment Scheduling

License Plate Number KA-SC-002 Vehicle Model BMW 528i Customer Berta Dudenhöfer Plant 0001 Start Visit Time 00.00.0000 / End Visit Time 00.00.0000 / 00.00.0000

1 General Data 2 Work Scope 3 Appointment Scheduling 4 Planning Service Advisor 5 Mobility 6 Data check and Save 7 Confirmation

Previous Next Close

Order Data

Full Name: Berta Dudenhöfer Plant: 0001
 Address: Bahnhofstr 117, 69190 Walldorf Sales Organization: 0001
 Order Type: 2000 Distribution Channel: Q3
 Order reason: Sales activity
 Counter reading: 102000 | KM Kilometer
 Remark:

2. Work scope, where the agent defines the work to be performed either selected from a labor value catalog or manually entered

DBM Web UI: GAF - Create Appointment

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1 General Data 2 Work Scope 3 Appointment Scheduling 4 Planning Service Advisor 5 Mobility 6 Data check and Save 7 Confirmation

Estimation Labour Values

Labor Value Catalog

Catalog: ESTIMATED TIME CA... Search: Search

Repair Description	Target Time
00 Engine	
• 000000100 Engine Check Est Time	20 MIN
• 000000101 Engine Wash Est Time	20 MIN
• 000090100 I Service and wintercheckul	120 MIN
• 000100100 Brake Check Est Time	20 MIN
• 000100101 Brake Change Est Time	20 MIN
• 000100102 Overall Inspection Est Time	20 MIN
• 000100103 Small Inspection Est Time	20 MIN
• 000200100 Check Electronic Control Est Time	20 MIN
07 Service / Inspection	
• 070000100 Inspection small	150 MIN
• 070000200 Inspection big	240 MIN
• 070000301 Winter Check	70 MIN
• 070000302 Summer Check	50 MIN

Selected Positions

LV Hier. No.	Repair Description	Estimated Time	BUoM	LV Group
070000200	Inspection big	240,00	MIN	01
000100100	Brake Check Est Tii	20,00	MIN	01

OK Cancel

- Appointment scheduling, where the agent select the service date according to service team availability and customers wish.

- Planning service advisor, where the agent selects the service advisor talking to the customer and updating the service order with service details to perform

- Mobility, within the mobility steps an available loaner car can be selected
- Data check and save gives a summarized overview of the appointment details (appointment date, services had been selected, customer details)
- Last step is the final confirmation. The system saves the appointment booking.

This new guided procedure optimizes the appointment booking process:

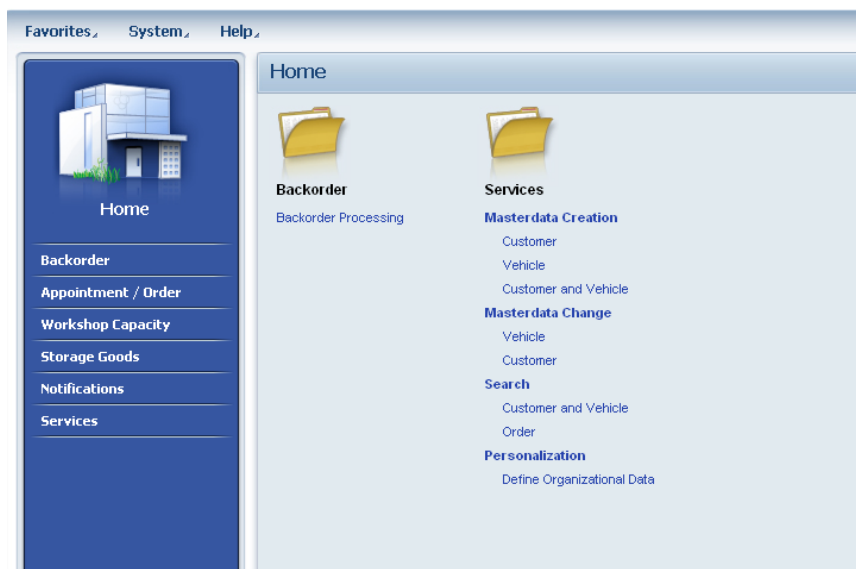
- Time-reducing Appointment Scheduling through usage of pre-defined steps of a Guided Procedure
- User-friendly One-Screen-Application with the possibility to navigate forward and backward
- New Screen limited to reduced and only the necessary information for creating an Appointment

- Usage of Graphical Boards for a faster input including free department capacities, service advisors and replacement cars for a faster input
- Fully integration and navigation to customer and vehicle master data if details are necessary through the creation steps

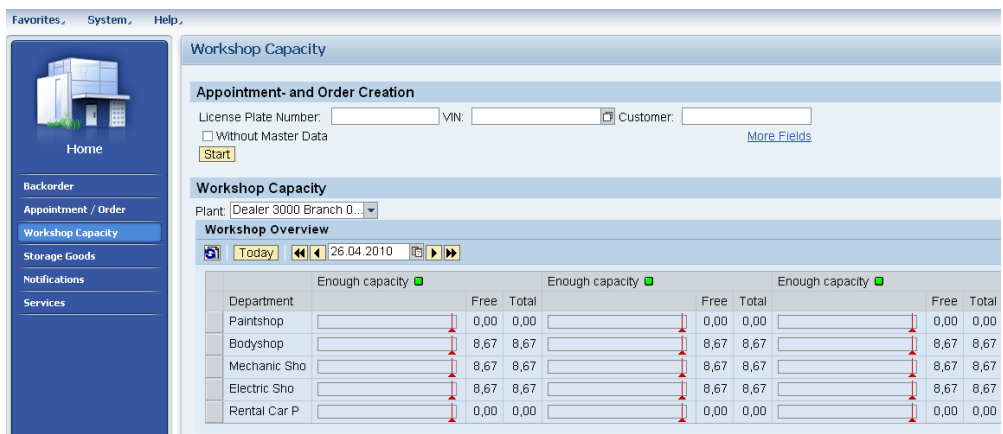
Service Advisors Work Center

A new web based service advisor work center is provided supporting the daily business of a service advisor including a 360 degree view on customers, vehicles, service orders and all related activities.

The work center provides a navigation panel with quick access to all important service related business transactions.



- Appointments / Orders supports
 - Customer and vehicle search and creation of new master data
 - Easy and quick create of service orders and appointments
 - List of service orders of the day filtered on different order status
 - Service orders follow up processing and monitoring
- Workshop overview provides a capacity overview per service team



- Notification provides the list of activities of the dealership of the day

Related Content

[BPX SAP for Automotive](#)

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