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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Table of Contents

Web Based User Interface for Service Advisors: Making Service Advisors’ Life Easier (New within DBM 7.0) .............................................................. 3
  Guided Procedure for Appointment Booking ................................................................. 3
  Service Advisors Work Center ...................................................................................... 6
Related Content ................................................................................................................ 7
Copyright .......................................................................................................................... 8
Web Based User Interface for Service Advisors: Making Service Advisors’ Life Easier (New within DBM 7.0)

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.

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.
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.

2. **Work scope**, where the agent defines the work to be performed either selected from a labor value catalog or manually entered.
3. Appointment scheduling, where the agent selects the service date according to service team availability and customers wish.

**Create Appointment Scheduling**

<table>
<thead>
<tr>
<th>License Plate Number</th>
<th>Vehicle Model</th>
<th>Customer</th>
<th>Plant</th>
<th>Start Visit Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>K4-SC-002</td>
<td>BMW 528i</td>
<td>Berta Dudenfelder</td>
<td>0001</td>
<td>00.00.000C</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>General Data</th>
<th>Work Scope</th>
<th>Appointment Scheduling</th>
<th>Planning Service Advisor</th>
<th>Mobility</th>
<th>Data check and Save</th>
<th>Confirmation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
</tr>
</tbody>
</table>

- **Previous** | **Next** | **Close**

**Workshop Overview**

<table>
<thead>
<tr>
<th>Department</th>
<th>Enough capacity</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mechanic</td>
<td>20.04.10 Monday</td>
<td>4,33</td>
</tr>
<tr>
<td>BOC</td>
<td>20.04.10 Tuesday</td>
<td>6,67</td>
</tr>
</tbody>
</table>

**Planning Overview**

- **Split Task** | **Department Change** | **Delete** | **Planning Reset**

<table>
<thead>
<tr>
<th>Department / Task</th>
<th>Start Date</th>
<th>Estimated Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mechanic</td>
<td>26.04.10</td>
<td>240.00 MIN</td>
</tr>
<tr>
<td>0000100100 - Inspection</td>
<td>26.04.10</td>
<td>240.00 MIN</td>
</tr>
<tr>
<td>0000100101 - Brake Check</td>
<td>26.04.10</td>
<td>20.00 MIN</td>
</tr>
</tbody>
</table>

**Last step is the final confirmation. The system saves the appointment booking.**

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

**Create Appointment Scheduling**

- **APPOINTMENT DATE**
- **CUSTOMER**
- **SERVICE ADVISOR**
- **START TIME**
- **END TIME**
- **ESTIMATED TIME**

**Apartment data**

- **Customer**
- **Service Advisor**
- **Reference Advisor:**

**Appointment包含**

- **Booking Date**
- **Booking Time**
- **Booking Description**
- **Booking Type**

**Appointment Details**

- **Number of displayed days**
- **Start Time**
- **End Time**

**5. Mobility, within the mobility steps an available loaner car can be selected**

6. Data check and save gives a summarized overview of the appointment details (appointment date, services had been selected, customer details)

7. **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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