Infor LN Service User Guide for Dealer Workbench

Publication Information

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About this document

This guide describes the various concepts and processes for the Dealer Workbench.

Objectives

This document is designed to meet the objectives described below. It is assumed that you already have a understanding of Infor LN Service.

Understand the following concepts
- Claims
- Items and Business Partners

Perform the following tasks
- Creating Business Partners
- Creating Claims

Document summary

This guide explains the various concepts and processes for the Dealer Workbench.

How to read this document

This document is assembled from online Help topics. As a result, references to other sections in the manual are presented as shown in the following example:

For details, refer to Infor LN Service Online Help.

Please refer to the Table of Contents to locate the referred section.

Underlined terms indicate a link to a glossary definition. If you view this document online and you click on underlined text, you jump to the glossary definition at the end of this document.

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Chapter 1
Introduction

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The Dealer Workbench allows a dealer to create a new customer, register the items and create the claims.

Dealer Workbench

An OEM-er (Original Equipment Manufacturer) manufactures items which are sold to the customer by a dealer. When such items require repair or replacement, the dealer creates a claim for the OEM-er.

To support this scenario, the Dealer Workbench (tstdm8350m000) is created wherein, a dealer can:

- Create a new customer (business partner) and manage the existing customer data.
- Register the serialized items and update the item data.
- Create customer claims.

Note

- The OEM-er, dealer, sub-dealers and the customers are defined as business partners in Infor LN.
- The items that are sold by the dealer, are defined as serialized items in Infor LN.
- A parent-child structure is defined to represent:
    - The dealer and sub-dealer relationship
    - The dealer and the customer relationship
- A Demo machine is owned by an OEM-er who is not a customer of a Dealer.

Setting up the master data

To use the workbench, you must set up this master data:

- **Business Partner (tccom4500m000)**
  Use this session to:
    - Define a Dealer as a business partner.

- Define a customer (if known) as a business partner. When the end-customer is defined, you must specify the Dealer for the customer in the Parent field.
- **Business Partner Defaults (tccom4101m000)**
  Use this session to define the default data for a business partner. Infor LN defaults this data when the dealer creates a new customer in the workbench.
- **Dealer Workbench Authorizations (tsmdm1165m000)**
  Use this session to link an Infor LN user to a dealer and specify the default data for the business partner. When the Infor LN user accesses the Dealer Workbench, the user can view the data only for the linked dealer. This restricts the user from accessing the data of other dealers. If you do not set this authorization for an Infor LN user, and the user accesses the Dealer Workbench, the user can select a dealer and view the related data.
- **Employees (tccom0101m000)**
  Use this session to define the Employee - People Data and the Employee - Service Data for each dealer.
- **Items (tcibd0501m000)**
  Use this session to define the item and the Item - Service data for Service. The item must be serialized.
- **Serialized Items (tscfg2100m000)**
  Use this session to define the serialized item and specify the Owner, the In-Use By business partner and the Dealer. **Note**: You can create an item with the Physical Top check box selected for Serialized Items only if the Structure Type Usage check box is selected in the Configuration Management Parameters (tscfg0100m000) session.
- **Physical Breakdown (tscfg2110m000)**
  Use this session to create the physical breakdown structure manually or based on the Source:
  - As-Built Structure
  - Bill of Material

Dealer Workbench Layout

The workbench consists of:

- Toolbar
- Customer tab
- Items tab
- Details pane

Toolbar

You can use these options on the toolbar:

- **New Customer ( )**
  Allows you to add a new customer. The New Customer window is displayed wherein you can specify the details of the customer.

  Note: If the Business Partner Defaults is linked to the user in the Dealer Workbench Authorizations (tsmdm1165m000) session, Infor LN defaults the data for the new customer based on the linked Business Partner Defaults. Else, Infor LN defaults the first business partner data with the Business Partner Role field set to Customer or Customer and Supplier in the Business Partner Defaults (tccom4101m000) session.

- **Dealers List**
  Allows you to select a dealer from the list of business partners. The data in the workbench is displayed for the selected dealer.

  Note: This option is displayed only if in the Dealer Workbench Authorizations (tsmdm1165m000) session, a dealer is not linked to the Infor LN user who accesses the workbench. If the Infor LN user and the dealer are linked, the user can view only the details of the dealer linked to the user in the Dealer Workbench Authorizations (tsmdm1165m000) session. The name of the dealer is displayed and the user cannot select another dealer.

- **Refresh ( )**
  Synchronizes and updates the data in Infor LN.

Customer tab

On this tab, you can view:

- The list of customers linked to the selected dealer.
- The list of sub-dealers linked to the selected dealer.
- The list of customers linked to the sub-dealers.

Note

To view the list of customers linked to the sub-dealers, click ╋ corresponding to the sub-dealer. To collapse the list, click ▬.

When you select a customer, these tabs and options are displayed in the Details pane:

- **Details tab**
  The details of the selected customer are displayed.

- **Items tab**
  The list of items owned by the selected customer are displayed.

  Click corresponding to an item to view the details in the Item window.

- **Claims tab**
  The list of claims linked to the selected customer are displayed.

  Click corresponding to a claim to view the details and the claim lines linked to the claim, in the Claim window.

Click ✚ to view the list of claim lines linked to the selected claim. To collapse the list, click ▬.

- **The Edit Customer option**
  Use this option to edit the details of the selected customer. The Edit Customer window is displayed wherein you can modify the Customer Address and Contact for the customer and the dealer. After you save this data, the modified data is updated in the related Infor LN sessions.

- **The Register Item option**
  Use this option to sell an item to the selected customer. See *Registering an item using the Dealer Workbench (p. 13)*.

- **The New Claim option**
  Use this option create a new claim with an Item or without an Item specified. See *Creating a new claim using the Dealer Workbench (p. 15)*.

Items tab

On this tab, you can view the list of items and the corresponding owners, for a specific dealer.

When you select an item, these tabs and options are displayed in the Details pane:

- **Details tab**
  The details of the selected item are displayed.

- **The Components tab**
  The list of components linked to the selected item and the details of the component such as Shipment ID, Shipment Line and the Claims, are displayed.

  Click 🔁 corresponding to a component to view the details in the Component window.

  Note: If an Anonymous Item is selected, Infor LN displays the number of claims that have been availed from the available number of claims for the selected serial number, in the Claims column. The count of the claims is calculated based on the sales order lines that are created for the item and the items shipped to the dealer in Infor LN.

- **The Claims tab**
  The list of claims and the linked claim lines for the selected item. You can also view the details of the claim lines such as Cost Type, Cost, Status and Breakdown Date.

  Click 🔁 corresponding to a claim to view the claim details and the claim lines linked to the claim, in the Claim window.

  Click ✚ to view the list of claim lines linked to the selected claim. To collapse the list, click ▬.

- **The Edit Item option**
  Use this option to modify the details of the item. The Edit Item window is displayed wherein you can modify only the Contact of the customer, for the item. The modified data is updated in the related Infor LN sessions.

- **The Register Item option**
  Use this option to register an item with the selected customer. See *Registering an item using the Dealer Workbench (p. 13)*.

■ **The New Claim option**
Use this option to create a claim with an Item or without an Item specified. See *Creating a new claim using the Dealer Workbench (p. 15)*.

Chapter 2
Registering an Item

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A dealer can register an item with a customer using the Dealer Workbench.

Registering an item using the Dealer Workbench

To register an item (owned by the dealer) with a customer linked to the dealer:

1. Click Register Item in the Details pane. The Register Item window is displayed.
   Note:

   - If you select a customer on the Customers tab and access the Register Item window, Infor LN defaults the Customer name. You must select the Serial Number of the item, from the list of items.

   - If you select an Item on the Items tab and access the Register Item window, Infor LN defaults the Item code. You must select the Customer, from the list of customers. The Register Item option is enabled only if the Owner of the selected item is the selected dealer.

2. Specify this information:

   - **Item**
     The code of the item that is registered with a customer. This value is defaulted based on the specified Serial Number.

   - **Serial Number**
     The serial number of the item. If a dealer wants to create a claim without header Item/Serial Number, empty Serial Number can be selected.

   - **Installation Date**
     The date and time when the item is registered with a customer. Infor LN defaults the current date and time of the system.

   - **Customer**
     The name of the customer with whom the item is registered.

   - **Picture**
     The image of the serialized Item. **Note**

     - Infor LN displays the image linked to the selected Serial Number.

- ■ You can click ▤ to add or change an image.
- ■ **Verification**
  The verification checks that must be selected to complete the registration of the item for the customer.

  Note: The Save option is enabled only after all the check boxes are selected.

3. Click Save to complete the registration process. The ownership of the item is transferred to the specified Customer in the workbench and in the related Infor LN sessions.

4. Click Cancel to cancel the registration process.

Chapter 3
Creating Claims

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A dealer can create claims using the Dealer Workbench.

Creating a new claim using the Dealer Workbench

A new claim can be created with an Item or without an Item specified on the header.

To create a claim in the workbench:

1. Click New Claim in the Details pane. The New Claim window is displayed.
2. Specify this information:

   ■ **Creation Date**
   The date and time when the claim is created. By default, the current date and time of the system is considered, and you cannot modify this value.

   ■ **Breakdown Date**
   The date and time when the Item breakdown occurred. This value is defaulted from the Creation Date field. However, you can modify this value.

   ■ **Measured Value**
   The measurement value for the item. If this value is specified, Infor LN creates an Inspection for the claim.

   ■ **Measured Unit**
   The unit in which the Measured Value is expressed. Infor LN defaults this value from the Measurement Type defined for the customer claim in the Item Service (tsmdm2100m000) session.

   ■ **Total Amount**
   The total claimed amount. Infor LN displays the sum of the claimed amount specified for the linked claim lines.

   ■ **Item**
   The code and the name of the serialized item. Infor LN defaults this value based on the selected Serial Number.

   ■ **Serial Number**
   The serial number of the Item.

- **Owner**

  The owner of the serialized item.

- **Claim Description**

  The description of the claim.

- **Message**

  The additional information related to the claim.

3. Click ⊞ to add a claim line. The Claim Line window is displayed wherein you can specify the claim line details.

   If a claim is created with the Item specified on the header:

   - On creating a new claim line for the Material Cost Type, only the components related to the specified item are displayed.

   - For the selected serialized item, all the serial numbers owned by the owner of the item on the header are displayed.

   If a claim is created without the Item specified on the header:

   - On creating a new claim line, for the Material Cost Type, all items are displayed.

   - For the serialized item specified on the claim line, all serial numbers owned by the dealer, direct customer and OEM-er of the selected item are displayed.

   Note: For all other Cost Types, with or without the Item specified on the header, the behaviour is same.

4. Specify this information in the General section:

   - **Cost Type**

     The cost type for which the claim line is created. Possible values:

     Cost Type

   - **Travel Specification Type**

     The specification used to measure the travel costs. Possible values: Not Applicable, Travel Distance, Travel Time and Callout Charge.

     Note:

     - This field is set to Not Applicable and cannot be modified if the Cost type is set to a value other than Travelling.

     - A Dealer can set this field to Travel Distance, Travel Time or Callout Charge.

     - The Callout Charge option is displayed only when an Item/Serial Number is specified for the Claim. Else, the Travel Distance and Travel Time options are only displayed.

     - The unit price for Travel Distance and Travel Time are defaulted from the Travel Rate Book (tstdm1610m000) session, based on the selected dealer (business-partner), if specified. Else, the value is defaulted from the General Service Parameters (tsmdm0100m000) session.

   - **Item**

     The code of the item for which the claim line is created.

     Note:

- This field is enabled only if the Cost Type field is set to Material, Tooling, Subcontracting or Other.
- Infor LN displays:
  - The serialized items that are owned by the selected dealer and the direct customers of the dealer.
  - The non-serialized (Anonymous and Consumable) items.

- **Serial Number**
  The serial number of the selected item. Infor LN displays the list of serials linked to the selected Item, if the item is serialized.

  An Item that is not serialized in the Item (tcibd0501m100) session can be serialized in the Item - Service (tsmdm2100m000) session. When a serial number is not available for a serialized item, Dealer can create a New Claim Line for such serialized item without a serial number. The claim and the claim line status are set to Free. The serial can be generated in the LN session before submitting the claim.

  If a serial number exists for all claim lines with a serialized item, the status of the claim is set to Pending Approval after claim is submitted.

  Note: This field is enabled only if a serialized Item is selected.

- **Description**
  The description of the claim line.

- **Task**
  The code of the task. The value is defaulted from the Default Task field in the Claim Management (tscmm0100m000) session.

  Note: This value is defaulted when the Cost Type field is set to Labor and you cannot modify this value.

- **Labor Rate Code**
  The labor rate code. This valued is defaulted from the Tasks (tsmdm0115m000) session based on the specified Task.

  Note: This value is defaulted when the Cost Type field is set to Labor and you cannot modify this value.

- **Labor Type**
  The labor rate code. The value is defaulted from the Default Labor Type field in the Claim Management (tscmm0100m000) session.

  Note: This value is defaulted when the Cost Type field is set to Labor and you cannot modify this value.

- **Cost Component**
  The code of the cost component. This value is defaulted from the Tasks (tsmdm0115m000) session based on the specified task. If a cost component is not defined for the specified task, Infor LN defaults this value from the Service Order Parameters (tssoc0100m000) session, based on the specified Cost Type.

5. Specify this information in the Amounts section:

- **Claimed Quantity**

  The quantity for which the claim line is created. This value is considered to calculate the amount claimed.

  For the Material Cost Type, the claim count is displayed when an Anonymous Item is selected.

  Note: If an Anonymous Item is selected, and the claimed quantity is more than the claimed quantity allowed, Infor LN displays an error message and you cannot create a claim line.

- **Claimed Price**

  The price per unit of the quantity.

  The claimed price retrieval when:

  - **The Cost Type is set to Travelling**

    This value is defaulted based on the selected Travel Specification Type. If the Travel Specification Type is set to:

    - Travel Distance and a Travel Rate Book is created for the business partner, the application considers the value specified in the Sales Rate for Traveling Distance field, in the Travel Rate Book (tstdm1110m000) session. Else, the amount specified in the Standard Sales Price field for Travel Distance, in the General Service Parameters (tsmdm0100m000) session, is considered.

    - Travel Time and a Travel Rate Book is created for the business partner, the application considers the value specified in the Sales Rate for Traveling Time field, in the Travel Rate Book (tstdm1110m000) session. Else, the amount specified in the Standard Sales Price field for Travel Time, in the General Service Parameters (tsmdm0100m000) session, is considered.

    - Call Out Charge, the application considers the value specified in the Call Out Charge field in the Serialized Item (tscfg2600m000) session is considered.

  - **The Cost Type field is set to Material, Subcontracting or Other**

    a. Select an item for which Sales Order Line(s) exists in Infor LN.

    b. Click Get Price. The Sales Order Lines window is displayed with the list of sales order lines linked to the selected Serial Number.

    c. Select a sales order line and click OK.

- **Claimed Amount**

  The amount claimed for the specified quantity.

  Claimed Amount = Claimed Quantity * Claimed Price

6. Click OK in the Claim Line window to save the claim line. You can click Cancel to cancel the creation of the claim line.

7. Click Submit in the New Claim window to save the claim. You can click Cancel to cancel the creation of the claim.

8. Select the claim line and click 🗑 in the New Claim window to delete an existing claim line.

Copying claim lines in the Dealer Workbench from an existing document

You can copy the claim lines from the original document created in Infor LN. The document can be a sales order or shipment document.

To copy claim lines:

1. Click New Claim in the details pane. The New Claim window is displayed.
2. Specify the required information related to the claim.
3. Select the Document Type on the Claim Lines toolbar. You can select Sales Order or Shipment.
4. Select a document from the list of Documents.
5. Click ➡ to view the lines linked to the selected document in the details window.
6. Click OK to close the window.
7. Click 🔂. The lines linked to the selected document are copied to the claim as the claim lines.

Note

- The application deletes the existing claim lines that are created manually, when you copy the claim lines from a document.
- When a document is selected, by default, all the document lines are selected. However, before copying the lines, you can clear the check boxes corresponding to the document lines that are not required.
- You can also delete the claim line(s) after copying so that the line(s) is not linked to the claim.
- For non-serialized items, the application checks the available claimed quantity that must be less than or equal to the maximum allowed claimed quantity. This check is also done for the non-serialized items that are part of dealer item structure or not part of item structure. If the claim check fails, an appropriate error message is displayed. You can manually reduce the claimed quantity for anonymous item.
- For serialized items, multiple claim lines equal to the quantity specified on the document line are created, each with claimed quantity 1. You can manually delete the serialized claim lines.
- After you copy the claim lines from an original document, you can add a new claim lines manually.
- The drilldown option is not available for the claim lines copied from original document.
- If the launching BP is sub- dealer than the sub- dealer can view the documents related to the sub-dealer and dealer.
- The After Sales process must be executed for the serials to be displayed in the dealer workbench for serialized items.

Chapter 4
Authorization and Security

The authorization data can be set for a Dealer to access the options in the Dealer Workbench (tstdm8350m000).

Authorization and security

A dealer is authorized to use the options in the Dealer Workbench (tstdm8350m000) based on the permissions defined in the Employee Authorization (tcsec1600m000) session.

Impact of the defined permission on the Dealer Workbench

The access to these options are based on the authorization settings for the combination of business partner and item:

- **New Customer**
  Allows the Dealer to create new customer. This option is enabled only if the **Authorization Level** for the Dealer is set to **Use** or **Modify**.

- **Edit Customer**
  Allows the dealer to change the primary contact and address of Sub Dealer or End Customer. Also allows to modify the primary contact of the Workbench Dealer. The Edit Customer option can be used to modify the primary contact and the address only if the **Authorization Level** for Sub Dealer or End Customer is set to **Modify**.The primary contact of Workbench Dealer can be modified only if the **Authorization Level** for the Dealer is set to **Modify**.

- **Register Item**
  Allows the Dealer to register an Item for an End Customer. This option is enabled only if the **Authorization Level** for the End Customer is set to **Use** or **Modify**.

- **New Claim**
  Allows to create a claim for the Workbench Dealer. This option is enabled only if the **Authorization Level** for the Dealer is set to **Use** or **Modify**.

- **New Claim Line**
  Allows to create a Claim Lines. Claim lines can be created for various cost types. The **Authorization Level** is applicable only when a claim line is created for a non-serialized item. A claim line can be created for a non-serialized item, only if the **Authorization Level** for a non-serialized item is set to **Use** or **Modify**.