



# Infor LN Service User Guide for Dealer Workbench

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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

1

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

## 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 for an item. 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 for an item. See *Creating a new claim using the Dealer Workbench (p. 15)*.



# Chapter 2

## Registering an Item

2

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 and cannot be modified.

■ **Serial Number**

The serial number of the item.

■ **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

3

A dealer can create claims using the Dealer Workbench.

## Creating a new claim using the Dealer Workbench

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 claimed lines.
  - **Item**  
The code and the name of the serialized item. Infor LN defaults this value based on the selected Serial Number and you cannot modify this value.
  - **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.

4. Specify this information in the General section:

- **Cost Type**  
The cost type for which the claim line is created. Possible values:  
Cost Type
- **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.

**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 (tsomm0100m000) 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 value 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 (tsomm0100m000) 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.

**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.

■ **Claimed Amount**

The amount claimed for the specified quantity.

Claimed Amount = Claimed Quantity \* Claimed Price

**Note:** To calculate the Claimed Amount, the Claimed Price is retrieved based on the Cost Type. To retrieve the Claimed Price:

- Select an item for which Sales Order Line(s) exists in Infor LN.
- Click Get Price. The Sales Order Lines window is displayed with the list of sales order lines linked to the selected Serial Number.

The Get Price option is displayed only when the Cost Type field is set to Material, Subcontracting or Other.

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.

