MX Remarketing Requirements

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|  |  |  |
| --- | --- | --- |
| **Responsible Party** | **Date** | **Change** |
| Angie Shing | Dec 28, 2018 | Initial Creation |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# Story Details

## Assumptions

# Technical Assumptions

1. **All Data Queries will have a filter: Country Code = MX.**
2. **Source objects:**
3. Account
4. IO\_Retail\_Dealer\_Monthly
5. IO\_CRT\_Proposal
6. IO\_Vin\_Level\_Registration
7. IO\_Vin\_Registration

# Platform Access

## Salesforce Profiles and Roles

Salesforce Profiles and Role will be used to provision users with access to Backend Salesforce platform features.

1. Salesforce Profiles:
   1. Tbd
   2. tbd
   3. tbd
2. Salesforce Roles
   1. tbd
   2. tbd
   3. tbd

## Community Profiles and Roles

The community Profiles and Roles will be used for provisioning users to access the Remarketing Portal.

1. Community Profiles:
   1. Tbd
   2. tbd
   3. tbd
2. Community Roles
   1. tbd
   2. tbd
   3. tbd

## Auction Software Profiles and Roles

# Remarketing Portal

## Standard Page Format Items

CSS, logos, Color Schemes, etc

<Details from the MX LAF Team>

## Remarketing Portal User Access

The following users will have access to the following Pages/Tabs/Sections

1. Dealer User
   1. Homepage Dashboards
   2. Homepage “Online Benefits” Section
   3. Maturity Viewer
   4. FAQs
   5. Training
   6. Vehicle Entry/Creation
   7. Dealer Grounding Checklist
2. Lawyer/Agency User
   1. Vehicle Entry/Creation
   2. Channel Repossession Checklist
3. Inspection User
   1. Vehicles Requiring Inspection
   2. Inspection Checklist
4. GMF User
5. 3rd Party User

## Page Details

### Maturity Viewer Tab

#### Access

Dealer Users will have access to this tab. The vehicles displayed in the Maturity Viewer Vehicle list are all tied to the Dealer User’s Account Primary Dealer Number (PDN).

If the Dealer User is tied to an account where account type = POS, the Dealer user is limited to seeing only vehicles that are tied to the POS PDN. If the Dealer User is tied to an account where account type = Owner, the Dealer user is able to see vehicles that are tied to the “Owner” account PDN, as well as any accounts tied to the “Owner” account.

***Example: <add Diagram>***

*Account XYZ i Account type* ***Owner***

*Account XYZ is the parent of account ABC*

*User X is tied to account XYZ*

*Account ABC is Account type* ***POS***

*User B is tied to account ABC*

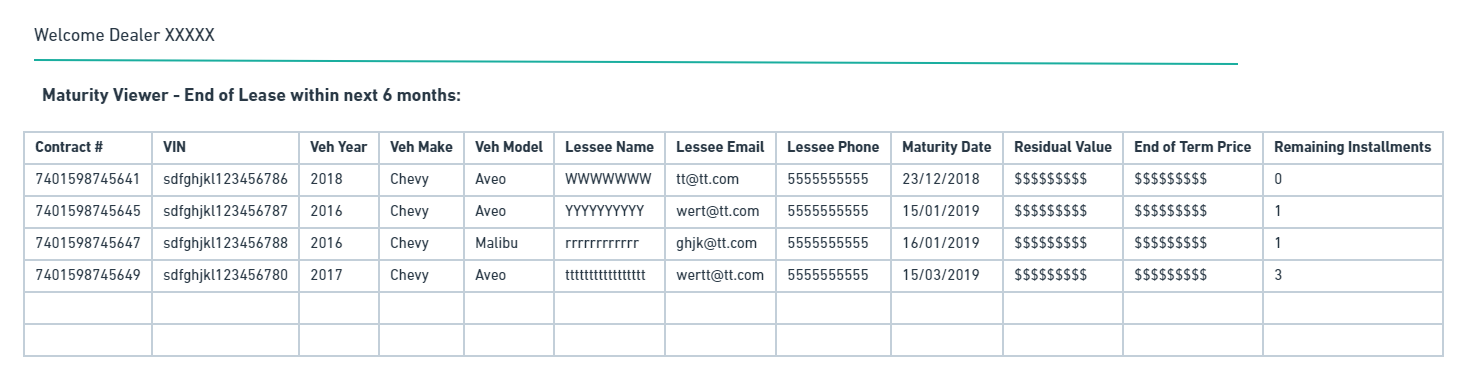
*User X can see any vehicles tied to account* ***XYZ OR ABC***

*User B can* ***ABC*** *see vehicles tied to account* ***ABC***

The Maturity Viewer tab/page will display a list of case records that meet the following criteria:

1. Maturity Viewer will display any Maturity Viewer Object records where Type = Lease and NPA Stage = ‘A’ and PDN = Dealer User’s Account PDN
2. <Query>
3. The Following Columns will be displayed:
   1. Primary Lessee Name
   2. Primary Lessee Email
   3. Primary Lessee Phone Number
   4. Vehicle VIN
   5. Contract Number
   6. Vehicle Year
   7. Vehicle Model
   8. Residual Value Amount
   9. End of Term Price
   10. Remaining Installment #

#### Mockup:



### Vehicle Entry/Creation

Access

Available to Grounding Dealers

### Inspection Pages

#### Vehicles Requiring Inspection

#### Inspection Checklist

1. Signatures

### Checklists

#### Dealer Grounding checklist

1. Signatures

#### Channel Repossession Checklist

#### Company Car Grounding Checklist

1. Signatures

### Auction Point of Entry

### FAQ

### Training

### Inspection Coverage?

### Transportation Coverage/Cost?

### Misc Page Sections

1. Auction Benefits
2. File Loads
   1. Documents
   2. Videos
   3. Images

# Auctions

## Details

1. Auction Setup
   1. Pricing
   2. User Access
   3. Auction Details
   4. Veh Details
2. Auction Features
   1. Veh Details
   2. Auctions
   3. Active Auction
   4. Home Page
   5. Search
   6. Extra Services
   7. Arbitration
   8. User Access
   9. Adobe Analytics
3. Veh Purchase
   1. Survey
   2. Payment Details
   3. Reports
4. Physical Auction

# Backend Salesforce (SF)

## Backend SF User Access

The following users will have access to the following Pages/Tabs/Sections

1. GMF User
   1. Homepage
   2. Veh Case Details
   3. Arbitration Case Details
   4. Reports
   5. Dashboards
   6. Accounts

## SF Backend Auction Setup

1. Pricing
2. User Access
3. Auction Details
4. Veh Details

## API Calls

## Data

1. Veh\_Lookup
   1. ID tied to Veh case based on VIN
2. Object Keys

Lease Veh Details

1. Data fields

## Account Records

### Access

#### GMF Users

1. GMF Users will be able to view all Account details within Salesforce.
2. They will be provisioned with a Profile XXX which has read access to all accounts.
3. The only account details that will be editable for this profile will be the Account Contact Details.
4. GMF Users can create new Accounts with Record Types of the following:
   1. IO Owner Account - New MX GM Retail account
   2. Lawyer\_Agency Account - Lawyer/Agency Account
   3. Rmkt 3rd Party Account - Rmkt 3rd Party account

#### Dealer Users

1. A Dealer User will be provisioned access to the Remarketing Portal only
2. There is no access to Salesforce Platform
3. These users will have a community license and community defined Profile and Role
4. The user will be a contact on the corresponding IO Owner Account type based on PDN

#### Lawyer/Agency Users

1. Lawyer/Agency Users will be provisioned access to the Remarketing Portal only.
2. Users of this type will be contacts on an Extraneous External Account created for the specific Law Firm or Agency.
3. Lawyer/Agency Users will have a community license and community defined Profile and Role
4. These accounts will be defined by a specific Account Record Type (Lawyer\_Agency Account)

#### Rmkt 3rd Party Users

1. Rmkt 3rd Party Users will be provisioned access to the Remarketing Portal only.
2. Users of this type will be contacts on an Rmkt 3rd Party Account created for the specific Rmkt 3rd Party
3. Rmkt 3rd Party Users will have a community license and community defined Profile and Role
4. These accounts will be defined by a specific Account Record Type (Rmkt 3rd Party Account)

#### Contacts

A GMF user will be assigned to each contact. Remarketing Users must all be contacts on and Account Record.

Contact details/fields to be available in the contact record page layout:

1. First Name \*
2. Last Name \*
3. Account Name \*
4. Email \*
5. Role \*
6. Mailing Address
   1. Street
   2. City
   3. Postal Code
   4. Country
   5. Phone \*
   6. Mobile

*\* Denotes required data entry fields*

## Case Records

Case records will be defined by the following records types:

1. LeaseVehicle
2. RepoVehicle
3. CompanyVehicle
4. ThirdPartyVehicle
5. Arbitration

All record type cases will have common/standard fields and layouts, with each record type having additional record type specific fields.

### Case Details

#### Common Fields:

1. Case Type – Case Type is dependent on Record type
2. Case Status
3. Case Stage
4. Vehicle Details:
   1. VIN
   2. Vehicle Year
   3. Make
   4. Model
   5. Variant Description
5. Contract Details
   1. Contract Number
6. Auction Details
   1. Selling price
   2. Reserve Price
   3. Iteration #
   4. Images
      1. #?
   5. Videos
      1. #?
   6. # Bids
   7. Winner
   8. Winner Account PDN
7. Auction History Details?
8. Inspection Details
   1. Inspector Details
   2. Inspection Date
   3. Checklist
   4. Signatures
9. File Loads
10. File Repository
11. Transportation Costs
12. Vehicle Purchase?
    1. Pass
    2. Purchase

#### LeaseVehicle Fields:

1. Primary Lessee Details
   1. Name
   2. Email
   3. Phone Number
2. Contract Details
   1. Residual Value Amount
   2. End of Term Price (RV + 2% Markup + VAT)
   3. # Remaining Installments
   4. NPA Stage
3. Grounding Dealer Details
   1. Account Name
   2. Account PDN
   3. Grounded Date
   4. Checklist
   5. Signatures

#### RepoVehicle Fields:

1. Agency/Lawyer Details
   1. Agency/Lawyer Name
   2. Possession Date
   3. Grounded Date
   4. Checklist
   5. Signatures

#### CompanyVehicle Fields:

1. Grounding Details
   1. Grounder Name
   2. Possession Date
   3. Grounded Date
   4. Checklist
   5. Signatures

#### ThirdPartyVehicle Fields:

1. TBD

#### Arbitration Fields:

1. Arbitration Details
   1. Auction Buyer Name
   2. Auction Buyer Business Location
   3. Contact Details
      1. Email
      2. Phone
      3. Address
   4. Reason for Arbitration drop down
      1. Values provided by business
   5. File Uploads
   6. Expected Refund
   7. Actual Refund
   8. Comment Text Area
   9. Response details
   10. History Log

### Case Workflows/Process Flows

#### Status Lists

**Veh Status list**

1. Vehicle Grounded
2. Exclusivity purchase
   1. Pass
   2. Purchase
   3. triggers: Dealer Purchased or Dealer Declined
3. Inspection Pending
4. Inspection in Progress
5. Inspection Complete
6. Transport in Progress
7. Transportation Complete
8. Insurance Cancelation confirmed
9. Pending Payment
10. Payment Cleared triggers: Vehicle Paid
11. Physical Auction – Scheduled
12. Vehicle Sold- Physical Auction
13. Approved for Auction
14. Online Auction

**Vehicle Purchase field options**

1. Pass
2. Purchase

#### Tasks

Insurance Cancelation

Once task = closed – status = Insurance Cancelation confirmed

#### Flows

1. Transportation notification
2. Insurance Cancelation confirmed – status update

# Reports Dashboard

## Data Flow

## Dashboards for Dealers

## Finance Report

## MIS Reports

## Online Auction

## Rmkt Team Dashboard

# Disaster Recovery Details