VEHICLE ORDERING
VEHICLE ORDERING

Private Retail Customer Orders

Local Business (SME) Customer Orders

Business Customer Orders with Protocol

Vehicle Stock Orders

Demonstrator Orders
PRIVATE RETAIL
CUSTOMER ORDERS
Private Retail Customer Order

Customer First (C1st)
A customer record is searched for or created here

SDH-OMS (Sales Data Hub – Order Management System)
1. Complete the customer consent form and pop-up screens
2. Complete the customer order section of the order form
3. Search for the vehicle required

Vehicle available from Stock

SDH-OMS
Select it from the available stock list. The vehicle number (CAR) selected and vehicle details will automatically populate on the order.

Vehicle not available from Stock

CRONOS
Create a stock vehicle (CAR) in CRONOS.
   a. From network stock: A stock vehicle will be assigned to the customer order where the vehicle meets the customer’s specification.
   b. From build: Where production is planned, a CAF (NSC / Head Office order to the factory) will be assigned to the CAR (Retailer order), to in turn fulfil the CCF (customer order)

SDH-OMS
Copy the stock vehicle number (CAR) from CRONOS back into SDH.

SDH-OMS (Sales Data Hub – Order Management System)
1. Fill in the Sub-Sub Channel and Promocode
2. Fill in the Expected Delivery Date where not populated
3. Select any relevant Commercial Operation Codes
4. Save the Customer Order
How to Create a Private Retail Customer Order

Log into Customer FIRST and from the home page click on the customer search button from the toolbar highlighted below:
Search for your customer using the search fields to see if they already have a customer account.

If an account already exists it will be visible in the search results, Click on the customer’s surname to access their account.

If no account is found, create a customer by clicking the "Create a Customer" button and follow the steps covered in your Customer FIRST training. [Click here to access](#)
To create a customer order (CCF), select an existing opportunity on your chosen customer record by clicking on the name of the relevant opportunity. NB. To learn more about opportunities, please re-visit your C1st training [click here to access].

Click on the “New Order” button highlighted below.
The following pop-up will now appear. Select and confirm the customer's consent for preferred methods of contact. Click "Save and Print Document".

Download or Print the consent document as required then click "Finish" as per your C1st training.
The “New Order” pop-up screen will appear. It will be auto-populated with “New Vehicle”. Click “Next”.

Confirm and update all customer detail fields, which are not already completed. Click “Next”.
Select Leaser from the drop down menu if applicable, If not applicable select “Not Applicable”. 
Complete the fields on the vehicle order form:

**New Customer Order Section**

NB. The yellow fields are mandatory.

**Sales Administrator:** Select the Sales Administrator creating the order.

**Contract Number:** This is a 7 digit field for a local / internal reference

**Agent / Sales Outlet:** Select if applicable.

**Order Form:** This is a local reference.

**Sales Executive:** Select the Sales Executive creating the order

**Order Number:** This will be pre-populated when the order is created

**Leasing Company:** This will be pre-populated with the selection made on the previous screen

The order date is fixed to the date of order creation in SDH.
Vehicle Data Section

Retailer Order field: To search for the correct vehicle based on the customer requirements, click the search icon (Magnifying Glass) next to the “Retailer Order” field.

Select the family/model of the vehicle you require.
Select the specification of the vehicle required for the customer order and click “Version List”.

Select the vehicle you require from the list.
Select the colour, trim and options, then click “Accept”

Your chosen vehicle will then appear on the vehicle order. The vehicle details selected will then need to be matched to a stock vehicle or placed on build.

To do this, click on the question mark next to the “Retailer Order” field.
There are 2 scenarios:

1. There is a vehicle in stock that matches the customer requirements
2. There is no vehicle in stock that matches the customer requirements

Scenario 1:
An existing vehicle is in stock and matches the description selected. Where this is the case, the relevant Retailer order number will need to be selected from the list by clicking the number.

Scenario 2:
There are no matches, and a new "Retailer Order" needs to be created by clicking "Create/Modify CAR" You will then be redirected to CRONOS.
When re-directed to CRONOS you will see the vehicle specification information has been pre-populated. Ensure the "Search for Exact Title" tick box is ticked and then click "Search".

NB. The “Search for Exact Title” tick box will enable you to search for an exact LCDV and will limit the search to this.

Select the result that matches your criteria and then click "Validate" to create the Retailer order (CAR).
You will then see confirmation that the Retailer order has been created. At the top of the screen you will find the Retailer order number (CAR). Take note or copy this as you will need this for the next step.

Go back to SDH and enter the Retailer order number you just noted into the “Retailer Order Number” Field. NB. If the Retailer order number has been inputted incorrectly, the customer order won’t save at the end of this process.
The message in red at the top of screen explains that this Retailer Order number is not found in SDH as you have only just created it in CRONOS. Importantly CRONOS takes up to fifteen minutes to feedback to SDH. However, You can still proceed and complete the order.

Select the “Sub-Sub Channel” from the drop-down.

If the Retailer Order exists in CRONOS, the “Expected Delivery Date” will be pre-filled.

If it is a new Retailer Order, fill in this field based on the latest published lead times from the NSC Distribution team by using the calendar icon.

Select the required “Promocode” from the drop-down menu.
Where relevant, open the "Commercial Operations" sub section by clicking on the button to the left of “Commercial Operations”.

Click on the red button to “Retrieve Applicable Operations”. You can select up to five operations.

Click "Save" when the customer order has been completed.

Scroll up on the page to see the following confirmation message, which will appear if your customer order has been successfully created.
LOCAL BUSINESS (SME) CUSTOMER ORDER
Local Business (SME) Customer Order

Customer First (C1st)
A customer record is searched for or created here

SDH-OMS (Sales Data Hub – Order Management System)
1. Complete the customer consent forms and select the Driver and Leaser from the pop-up screens
2. Complete the customer order section of the order form
3. Search for the vehicle required

Vehicle available from Stock

Vehicle not available from Stock

SDH-OMS
Select it from the available stock list. The vehicle number (CAR) selected and vehicle details will automatically populate on the order.

CRONOS
Create a stock vehicle (CAR) in CRONOS.
   a. From network stock: A stock vehicle will be assigned to the customer order where the vehicle meets the customer’s specification.
   b. From build: Where production is planned, a CAF (NSC / Head Office order to the factory) will be assigned to the CAR (Retailer order), to in turn fulfil the CCF (customer order)

SDH-OMS
Copy the stock vehicle number (CAR) from CRONOS back into SDH.

SDH-OMS (Sales Data Hub – Order Management System)
1. Fill in the Sub Sub Channel and Promocode
2. Fill in the Expected Delivery Date if not already populated
3. Select any relevant Commercial Operation Codes
4. Save the Customer Order
Log into Customer FIRST and from the home page click on the customer search button from the toolbar highlighted below:
Search for your customer using the search fields to see if they already have a customer account.

If an account already exists it will be visible in the search results. Click on the account name to access their account.

If no account is found, create a customer by clicking the "Create a Customer" button and follow the steps covered in your Customer FIRST training.

Click here to access
To create a customer order (CCF), select an existing opportunity on your chosen customer record by clicking on the name of the relevant opportunity. NB. To learn more about opportunities, please re-visit your C1st training. **Click here to access**

Click on the “New Order” button highlighted below.
The “New Order” pop-up screen will appear. It will be auto-populated with “New Vehicle”. Click “Next”.

Confirm and update all customer detail fields, which are not already completed. Click “Next”.
Select a Driver and Leaser from the drop-down menu. Complete the “Contact” drop-down. The “Contact” is the individual from the Business or Company handling the vehicle order.

The following pop-up will now appear. Select and confirm the customer’s consent for preferred methods of contact. Click "Save and Print Document".
Download or Print the consent document as required then click "Finish" as per your C1st training.

NB. If you have selected a Driver on the previous pop up menu you will also need to complete the same consent process for them.
Complete the fields on the vehicle order form:

**New Customer Order Section**

NB. The yellow fields are mandatory.

**Sales Administrator:** Select the Sales Administrator creating the order.

**Contract Number:** This is a 7 digit field for a local / internal reference

**Sales Outlet:** Select if applicable.

**Order Form:** This is a local reference.

**Sales Executive:** Select the Sales Executive creating the order

**Order Number:** This will be pre-populated when the order is created

**Leasing Company:** This will be pre-populated with the selection made on the previous screen

The order date is fixed to the date of order creation in SDH.
Vehicle Data Section

Retailer Order field: To search for the correct vehicle based on the customer requirements, click the search icon (Magnifying Glass) next to the “Retailer Order” field.

Select the family/model of the vehicle you require.
13 Select the specification of the vehicle required for the customer order and click “Version List”

14 Select the vehicle you require from the list.
Select the colour, trim and options, then click “Accept”

Your chosen vehicle will then appear on the vehicle order. The vehicle details selected will then need to be matched to a stock vehicle or placed on build.

To do this, click on the question mark next to the “Retailer Order” field.
There are 2 scenarios:
1. There is a vehicle in stock that matches the customer requirements
2. There is no vehicle in stock that matches the customer requirements

As we have covered Scenario 2 in the Private Retail Customer process, we will use Scenario 1 for this example.

Scenario 1:
An existing vehicle is in stock and matches the description selected. Where this is the case, the relevant Retailer order number will need to be selected from the list by clicking the number.
The selected vehicles details will populate into the “Vehicle Data” Tab.

Select the “Sub-Sub Channel” from the drop-down.

Fill in the “Expected Delivery Date” based on the latest published lead times from the NSC Distribution team by using the calendar icon.

Select the required “Promocode” from the drop-down menu.
The driver details will be automatically populated from the previous Customer FIRST pop-up screen.

Where relevant, open the "Commercial Operations" sub section by clicking on the button to the left of “Commercial Operations”. Click on the red button to “Retrieve Applicable Operations”. You can select up to five operations. Click "Save" when the customer order has been completed.
Scroll up on the page to see the following confirmation message, which will appear if your customer order has been successfully created.
BUSINESS CUSTOMER ORDERS WITH PROTOCOL
Business Customer Orders with Protocol

**Customer First (C1st)**
A customer record is searched for or created here

**SDH-CPQ (Sales Data Hub – Configure Price Quote)**
1. Customer details taken from C1st
2. New vehicle quote created with protocol selected

**SDH-OMS (Sales Data Hub – Order Management System)**
1. Complete the customer consent forms and select the Driver and Leaser from the pop-up screens
2. Complete the customer order section of the order form
3. Search for the vehicle required

**Vehicle available from Stock**

**SDH-OMS**
Select it from the available stock list. The vehicle number (CAR) selected and vehicle details will automatically populate on the order.

**Vehicle not available from Stock**

**CRONOS**
Create a stock vehicle (CAR) in CRONOS.

a. From network stock: A stock vehicle will be assigned to the customer order where the vehicle meets the customer’s specification.

b. From build: Where production is planned, a CAF (NSC / Head Office order to the factory) will be assigned to the CAR (Retailer order), to in turn fulfil the CCF (customer order)

**SDH-OMS**
Copy the stock vehicle number (CAR) from CRONOS back into SDH.

**SDH-OMS (Sales Data Hub – Order Management System)**
1. Fill in the Sub Sub Channel and Promocode
2. Fill in the Expected Delivery Date unless already populated
3. Select any relevant Commercial Operation Codes
4. Save the Customer Order
How to Create a Business Customer Order with a Protocol

What is a Protocol?
A protocol defines the specific discounts per model that can be applied to the customer.

N.B The quote and order form stages covered in this process are mandatory before placing a Business Customer Order with a protocol. This ensures the correct protocol and prices are retrieved and are associated with the order.

Log into Customer FIRST and from the home page click on the customer search button from the toolbar highlighted below:
Search for your customer using the search fields to see if they already have a customer account.

If an account already exists it will be visible in the search results, Click on the account name to access their account.

If no account is found, create a customer by clicking the "Create a Customer" button and follow the steps covered in your Customer FIRST training.

Click here to access
When creating a Business customer order this needs to be started from an opportunity. Select an existing opportunity on your chosen customer record by clicking on the name of the opportunity.

Creating a Business Customer order with protocol has to be completed in three stages. In this example we will look at all three stages. The steps you follow may differ depending on how far the opportunity has progressed and what steps have already been completed.
Stage One: Creating a Quote
To create a quote for the opportunity, click on the “New Quote” button.

The “New Quote” pop-up screen will appear. It will be auto-populated with “New Vehicle”. Complete the Contact and Driver field. Click “Next”.
You will then be taken to SDH-CPQ (Sales Data Hub – Configure Price Quote). From here, you can select the required vehicle. Where a protocol is available the vehicle model will be shown in red. In this example there is a protocol available for all displayed models.

From here, select “Version List” to view all available versions of the vehicle you have selected.
From the search results you will see in the B2B Protocol column all vehicles that have an associated protocol. To select the required vehicle, click on the vehicle in the “Version” column.

The available protocol pop-up will appear. Select the radio button to continue. The pop-up will close automatically when the radio button is selected.
Complete the rest of the quote as per your Customer First Training. You will notice under the “Savings” drop-down the protocol selected has been applied and detailed information on the discounts can be seen here.

Once completed save or print a copy of the Quote to validate.
Continue to the next stage of the process by clicking on the Opportunity name at the top.

Stage Two: Creating an Order Form
Back on the opportunity, you will see the quote you have just created under the “Quote” section. Click on the relevant quote hyperlink.
From the quote click on “New Order Form”

The following pop-up will now appear. Select and confirm the customer's consent for preferred methods of contact. Click "Save and Print Document"
Download or Print the consent document as required then click "Finish" as per your C1st training.
Confirm and update all customer detail fields, which are not already completed. Click “Next”.

Select Leaser from the drop-down menu.
The order form will then appear. Check the pre-populated information. Fill in the “Expected Delivery Date” based on the latest published lead times from the NSC Distribution team if it is not already populated using the calendar icon. Then click the RDS (Search for a Solution) hyperlink.

Once the RDS (Search for a Solution) pop-up has appeared and loaded, click the “Back” button.
Click “Print”

The completed order form will then be displayed. If required, save or print a copy. Click on the quote number at the top of the screen.
You will then be taken back to the Quote & Order form page. 

**Step Three: Creating the Order**

From the order form menu on the right hand side, click on the hyperlink of the order form you have just created.

From here click the “New Order” button.
The “New Order” pop-up menu will then appear. Confirm and update all customer detail fields, which are not already completed. Click “Next”.

Select a Driver from the drop-down menu if required, if not select “Not Applicable”. Click “Next”.
Complete the fields in the “New Customer Order” Section as shown in the previous order processes.

You will notice the vehicle data is pre-populated from the order form created previously.
Select the “Sub-Sub Channel” from the drop-down. Fill in the “Expected Delivery Date” based on the latest published lead times from the NSC Distribution team, if it is not already populated using the calendar icon. Select the required “Promocode” from the drop-down menu.

You will notice under payment conditions that the discounts have been applied from the previously applied protocol during the quote and order form process.
Where relevant, open the "Commercial Operations" sub section by clicking on the button to the left of “Commercial Operations”. Click on the red button to “Retrieve Applicable Operations”. You can select up to five operations. Click "Save" when the customer order has been completed.

Scroll up on the page to see the following confirmation message, which will appear if your customer order has been successfully created.
DEMONSTRATOR
ORDERS
Demonstrator Orders

SDH-OMS (Sales Data Hub – Order Management System)
1. Navigate straight to the Demo Stock section of SDH
2. Complete the customer order section of the order form
3. Search for the vehicle required

Vehicle available from Stock

SDH-OMS
Select it from the available stock list. The vehicle number (CAR) selected and vehicle details will automatically populate on the order.

Vehicle not available from Stock

CRONOS
Create a stock vehicle (CAR) in CRONOS.
   a. From network stock: A stock vehicle will be assigned to the customer order where the vehicle meets the customer’s specification.
   b. From build: Where production is planned, a CAF (NSC / Head Office order to the factory) will be assigned to the CAR (Retailer order), to in turn fulfil the CCF (customer order)

SDH-OMS
Copy the stock vehicle number (CAR) from CRONOS back into SDH.

SDH-OMS (Sales Data Hub – Order Management System)
1. Fill in the Sub Sub Channel and Promocode
2. Fill in the Expected Delivery Date if not already populated
3. Select any relevant Commercial Operation Codes
4. Save the Customer Order
Demonstrator Orders

1

Log into Customer 1st and access SDH from the top right of the C1st Homepage.
From the SDH toolbar select “DEMO STOCK” then select “Create Demo” from the drop-down menu.

Complete the first section with the name of the Sales Administrator and the Sales Executive. The “Order date” is automatically set to today’s date and cannot be amended.
For the Vehicle Data section, locate the vehicle you wish to order either by looking for an existing stock vehicle (CAR) or placing a new Retailer order (CAR) as shown during the process steps for “Private Retail Customer Order” earlier in guide.

For this example, we will select a vehicle from stock (unassigned Retailer order / CAR) by clicking the question mark icon.
Click on the Retailer order (CAR) number of the vehicle required.

The details of the vehicle selected will then be pre-populated on the Demonstrator Order Form.
Select the “Sub-Sub Channel” from the drop-down. Fill in the “Expected Delivery Date” based on the latest published lead times from the NSC Distribution team by using the calendar icon. Select the required “Promocode” from the drop-down menu. Click “Save”.

The following screen will appear. The first line will show the demonstrator order that has just been created. You will see here all demonstrator vehicle orders.
You can check the progress of your Demonstrator Order directly in CRONOS.

To do this, input the Retailer Order (CAR) number in the quick search bar and click search.

The order information will then be displayed.

NB. Demonstrator orders are created in the name of the Retailer as shown within the “Customer” section below.
VEHICLE STOCK ORDERS
Vehicle Stock Orders (CARs)

Vehicle Stock Orders are completed directly within Cronos and do not require the use of any other systems.

CRONOS

There are 2 ways to create a vehicle stock order (CAR) in CRONOS.

a. From network stock: Find a vehicle in Network stock and request it via the Vehicle Transfer System (VTS)

b. From build: Where production is planned, a CAF (NSC / Head Office order to the factory) will be assigned to the CAR (Retailer order).
Vehicle Stock Order (CAR)

1

On the Homepage, from the main navigation menu on the left hand side, click on ”Retailer order”, and then click on “Retailer Order Creation”.

The General Information section displays the auto-populated information for your Retailer. It will show your Retailer Account and Delivery address.
If the vehicle is going to be used as a Showroom vehicle, tick “Showroom Vehicle”. The “Local Reference” field is a free text field for your own use, which can also be used within searches.

Click on the magnifying glass to display the Catalogue where you can select the relevant criteria of the vehicle you are looking for and then click “Validate”.
In this example, we are ordering one vehicle so we do not need to alter the quantity highlighted. Click on “Search” to see the results. If you wish to start a new search, click “Reset”.

A list of stock vehicles that meets your requirements will appear. If a warning triangle appears, it means there is a limited quantity of vehicles available.

After a few seconds, a green tick will indicate if the vehicle is available on the Vehicle Transfer System (VTS). You can access the VTS directly by clicking on the green tick.
If one of the vehicles in the list shown meets your requirements, select it by ticking the "Forecast Delivery Date Column" radio button highlighted below. Then click on “Validate”.

Your order will then be created, and you will see the confirmation message on screen.
NB. If your search does not return any vehicles you need to go back and complete your choice in the title selection boxes and complete a more thorough search with more vehicle specification information.

Ensure you have completed the Family, Version, Paint and Trim drop-down menus. This will mean that the "Exact Title" tick box will be available to select. When all drop-down menus have been completed.
Click “Validate”.
You will then see the “Search for Exact Title” tick box appear. Ensure this tick box is ticked and click “Search”.

If there is no production planned, the results will show one result with an estimated delivery date to the Retailer. The system will display, by default, the date of 31/12/2099. In this case, the Retailer order will be updated with allocated production when it becomes available.
Where there is production planned, the relevant Forecast Delivery Date will appear. If you want to order this vehicle tick the "Forecast Delivery Date Column" radio button highlighted below and click “Validate”.

When your Retailer order has been successfully placed you will see a confirmation message appear on the screen.
Multiple Vehicle Stock Orders (CARs)

Multiple Vehicle Stock Orders are completed directly within Cronos and do not require the use of any other systems.

**CRONOS**

There are 2 ways to create a Vehicle Stock order (CAR) in CRONOS.

a. From network stock: Find a vehicle in Network stock and request it via the Vehicle Transfer System (VTS)

b. From build: Where production is planned, a CAF (NSC / Head Office order to the factory) will be assigned to the CAR (Retailer order).
Multiple Vehicle Stock Orders (CARs)

1. On the Homepage, from the main navigation menu on the left hand side, click on ”Retailer order”, and then click on “Retailer Order Creation”.

The General Information section displays the auto-populated information for your Retailer. It will show your Retailer Account and Delivery address.
If the vehicle is going to be used as a Showroom vehicle, tick “Showroom Vehicle”. The “Local Reference” field is a free text field for your own use, which can also be used within searches.

Click on the magnifying glass to display the Catalogue where you can select the relevant criteria of the vehicle you are looking for and then click “Validate”.

Enter the quantity of vehicles you require in the “Quantity” field. Click on “Search” to see the results. If you wish to start a new search, click “Reset”.

In this example, six have been requested but there are only three available displayed by the system. Select the three available and click “Validate”.
Click on “Detailed Export of Created CAR” to export a list of orders created to Excel.

This will automatically download an Excel report of the multiple order you have just created. Save a copy so that you have a record of the order numbers.
Back in CRONOS, click “Add to your cart” to add the three vehicles you have selected. To order the remaining three vehicles required, you will need to define a more exact search. Click on “Retailer Order Creation” on the main menu as highlighted.

It is important here that a more detailed search is complete. Ensure you have completed the “Family”, “Version”, “Paint” and “Trim” drop-down menus this will ensure the "Exact title" tick box is available to select. Click “Validate”.
Make sure you tick the “Search for Exact Title” box and update the quantity as required for the outstanding vehicles. Click “Search”.

When the results are displayed, select the “Quantity” as required and the “Validate” button will appear. Click “Validate”.
An updated report of your multiple stock order including all six vehicles requested will automatically download and be visible.

When you have saved and closed the Excel spreadsheet, go back to CRONOS and click "Add to your cart".
Finally, click on “Retailer Order Search” on the main menu. Click “Search” and sort the search by the most recent creation date. The multiple vehicles you ordered will be displayed.