

**DOCUMENTATION**  
**APPLICATION**  
**FOR**  
**VOLKSWAGEN ORGANIZATION**  
  
**DEALER PORTAL**  
  
**VERSION 1.0.3.1**

# Dealer Portal Handbook

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## 1 Introduction

The Volkswagen dealer portal (named “portal” further on) is an application which enables a logged in user to start further applications without having to log in newly each time.

You can access the portal via CPN1 (<http://portal.cpn.vwg>) or via internet (<https://dealerportal.vw-group.com>). The latter allows the usage of only those applications which can be accessed via Internet.

The organisations, which do not have access to the portal so far, have to register one employee as a local administrator first (see 4.4 Register a local administrator). This local administrator can then log in to the portal and add new users as well as manage their permissions via local user administration (see 6 Local user administration).

You can assign not only applications to a user but also access rights within the application (see 6.3.2 Tab “Applications”). These access rights are called **roles** in the portal.

Regardless of the application assignment, a user can in addition get several employee roles (please, do not mix them up with the roles mentioned above) (see 6.6 Manage employee roles). An employee role means that a user has a specific function in the organisation or that he/she is a contact person for a specific subject (e.g. management, prospective customer manager).

Portal users have the possibility to change their own profile (e.g. language or password) (see 5.3 Input mask “My profile” ).

### Hint concerning the Global-UserID:

The Global-UserID is a corporate, unique UserID. The Global-UserID will be assigned to a user after the importer has introduced the Global-UserID into its market. Until this moment the previous UserID can be used.

This document assumes that the Global-UserID is already in use.

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<sup>1</sup> Central Partner Network: Network for connecting importers and dealers

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## Section overview

Section 3, *General information about using the portal*, gives an introduction of how the portal should be used.

Section 4, Logging in to the portal describes the process of logging in and all other functions of the portal logon and start pages.

Section 5, *Using the portal*, describes how to use the portal after having logged on. This includes changing the user profile and password, as well as creating favourites.

Section 6, *Local user administration*, explains how the local administrator creates and manages users and organisation data.

Section 7, Quick reference for local user administration, is aimed at providing quick and precise instructions concerning the local user administration. Please use this section also as a reference.


Section 8, *Additional information*, provides you with detailed instructions concerning the usage of list boxes and other components.

## 2 Prerequisites

Minimum requirements to use the portal:

- Microsoft Internet Explorer 9.0, with standard settings (cookies and JavaScript must be activated).
- Screen resolution 1024 x 768
- Arial font

## 3 General information about using the portal

Please do not use the button „back“ of your browser. The button  is to be used instead or you can also select the menu item from the menu once again.

### 3.1 Tabs

A lot of the screen masks are shown as tabs which are piled up on your screen. You can only see the content of the chosen (lying on top) tab, which is coloured in light grey; hidden tabs have a dark grey colour.

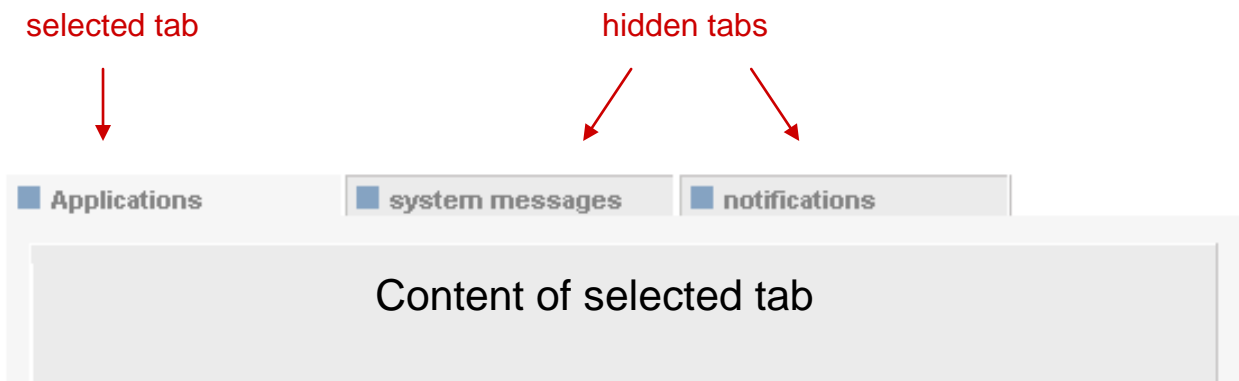


Figure 1 Tabs

By clicking on a tab you can bring it to the foreground

**Example:** Click on the tab  to be able to view its contents.

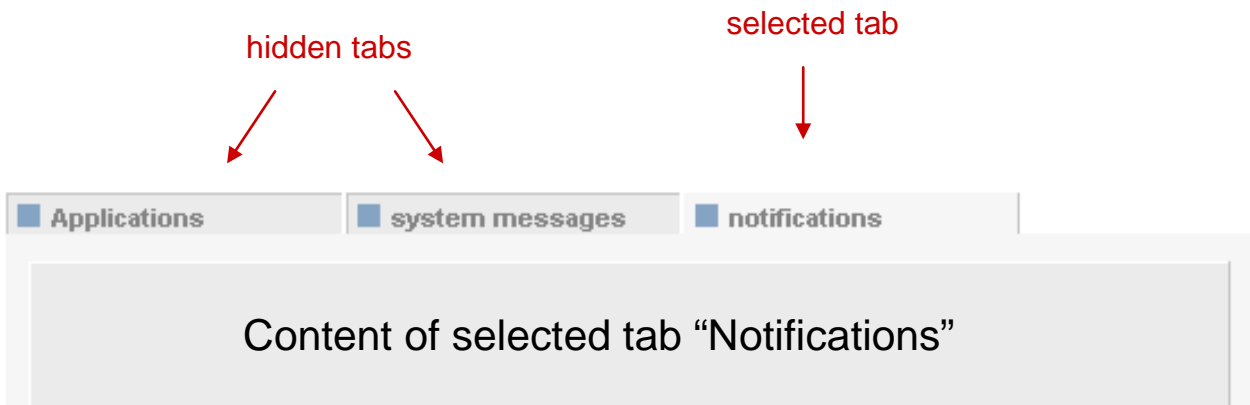




Figure 2 Select a tab

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## 3.2 Buttons

There are diverse buttons among different input masks and dialogs.

Buttons are special areas of a page which can carry out certain actions when you click on them. They are recognized when the mouse symbol “arrow”  changes into “hand”  while pointing on them.

The most often used buttons and their functions are briefly described below:

	Go back to portal site.
	Logout of the portal.
	All entered values are changed back to their original values.
	Submit changes.
	Close the window or leave the menu without saving changes.
	Open the user's profile input mask (see 5.3 <i>Input mask “My profile”</i> ).
	Open a help window.

**Buttons on tabs** refer not only to the visible tab but also the hidden ones. For example, if some settings have been changed in more than one tab, the  button will save the settings of both visible and currently not visible (hidden) tabs.

You will find further information about using the portal in section 8, *Additional information*.



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## 4 Logging in to the portal

If an organisation has no registered portal users so far, it should start with the registration of one employee as an administrator (local administrator). This local administrator can then create further users. How to register the local administrator is described in Section 4.4 *Register a local administrator*.

**After having successfully logged in for the first time, each user should change the default password. The password should be kept secret.**

If there are problems with logging in, the local administrator must check user details and the status of his/her account. The logging in is only possible when the account status put on “active”. (see 6.3 *Manage user details*).

There are two ways of logging in:

- Enter the Org-ID, the User-ID and the password and click on  or confirm with the return key.
- Enter the Global-UserID and the password and click on  or confirm with the return key.

**After having logged with the Global-UserID once, a user can not log in with the Org-ID and the User-ID anymore.**

### Log in with Org-ID and User-ID:

Org-ID  User-ID  Password

[Login with Global-UserID](#)

Figure 3 Portal log in page

By choosing [Login with Global-UserID](#) the user will switch to the logging possibility with the help of the Global-UserID.

### Log in with Global-UserID:

Global-UserID  Password

[Login with Org-ID and UserID](#)

Figure 4 Portal log in page

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By choosing **Login with Org-ID and UserID** the user will switch to the logging possibility with the help of Org-ID and User-ID.

**Note that while entering your password you should mind capital and small letters (it is case sensitive).**

After entering repeatedly the wrong password, the user will be blocked for the next 3 minutes. When the time is over, the user can login again.

**The local administrator can set a new password, if a user has forgotten his old one. (see 6.3 Manage user details).**

## 4.1 Choosing the language

### Available languages

Deutsch  
**English**  
Français  
Español  
Italiano  
Nederlands  
US English

On the left side of the page you can find a list of languages available for login page. If you want to switch to a different language, click on the appropriate entry. Note that after logging in, all the texts will be shown in the language defined in the user profile (see 5.3 *Input mask "My profile"*).

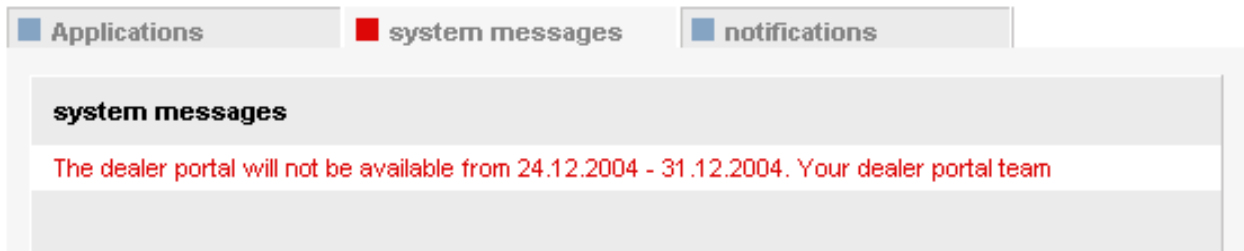
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## 4.2 System state

System state displays current messages from the system. If there are any new messages, the tab will be coloured in red.

By clicking on the tab  you will get system messages displayed.



**Figure 5 System state**

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## 4.3 Telephone support

In order to get telephone support for the system the user should click on the “Telephone support” tab and then follow the link. A browser window with corresponding telephone numbers will open.

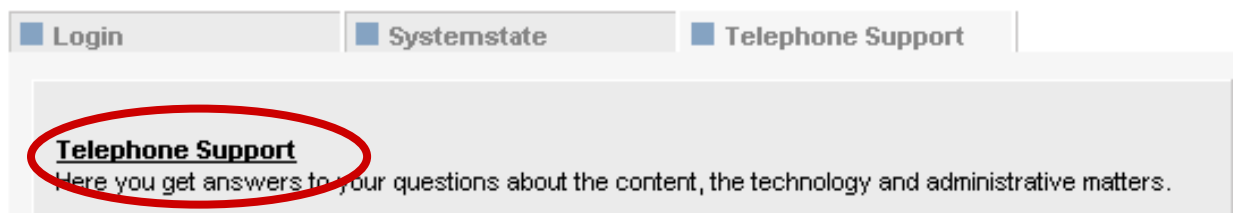


Figure 6 Telephone support

You can close or minimize this browser window in order to get back to the portal page.

## 4.4 Register a local administrator

The old version of the portal created an administrator for new organisations automatically. This person could then manage his/her users.

The current version of the portal will not carry out the creation of a local administrator automatically. Instead of it, an employee from a new organisation can register himself/herself as a local administrator.

To do so a user must enter his org ID and press the  button. In the following registration form the new local administrator must enter data and the security code (see *Figure 7 Registration form*).

He/She can get his/her org ID and security code from the responsible importer. Further on you will find the corresponding registration form.

Error messages and tips can be found on a second tab “Feedback”, which is shown automatically.

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## Portal Administration.

The screenshot shows a web form titled "Registrationform" with two tabs: "Registration" (selected) and "Feedback". The form contains the following fields:

- Org - ID: de471110
- Password: [Empty text box]
- Password Confirmation: [Empty text box]
- Securitycode: [Empty text box]
- Salutation: Mr (dropdown menu)
- First name: [Empty text box]
- Last name: [Empty text box]
- Identity card number: [Empty text box] (Last three digits)
- Date of birth: [Empty text box] . [Empty text box] . [Empty text box] (DD.MM.YYYY)
- eMail: [Empty text box]
- Language: English (dropdown menu)

At the bottom of the form, there are two buttons: "Cancel" and "Submit".

**Figure 7 Registration form**

All fields must be filled out in the registration form. Please click on  to save your data.

**You should choose a password which is not similar to the org ID or the user ID.**

After this an email containing a link will be sent to the local administrator. Clicking on this link will cause the portal to start. The local administrator then logs in with the login information he/she has just entered on the registration page. After the logging in, the registration can be considered fully completed.

A user registered in this way will automatically become the role of the local administrator in the application "Local User Administration".

This way of registration allows only one local administrator per organisation. However, the local administrator can create other users with administrator rights.

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## 5 Using the portal

The portal start page is displayed after logging in.

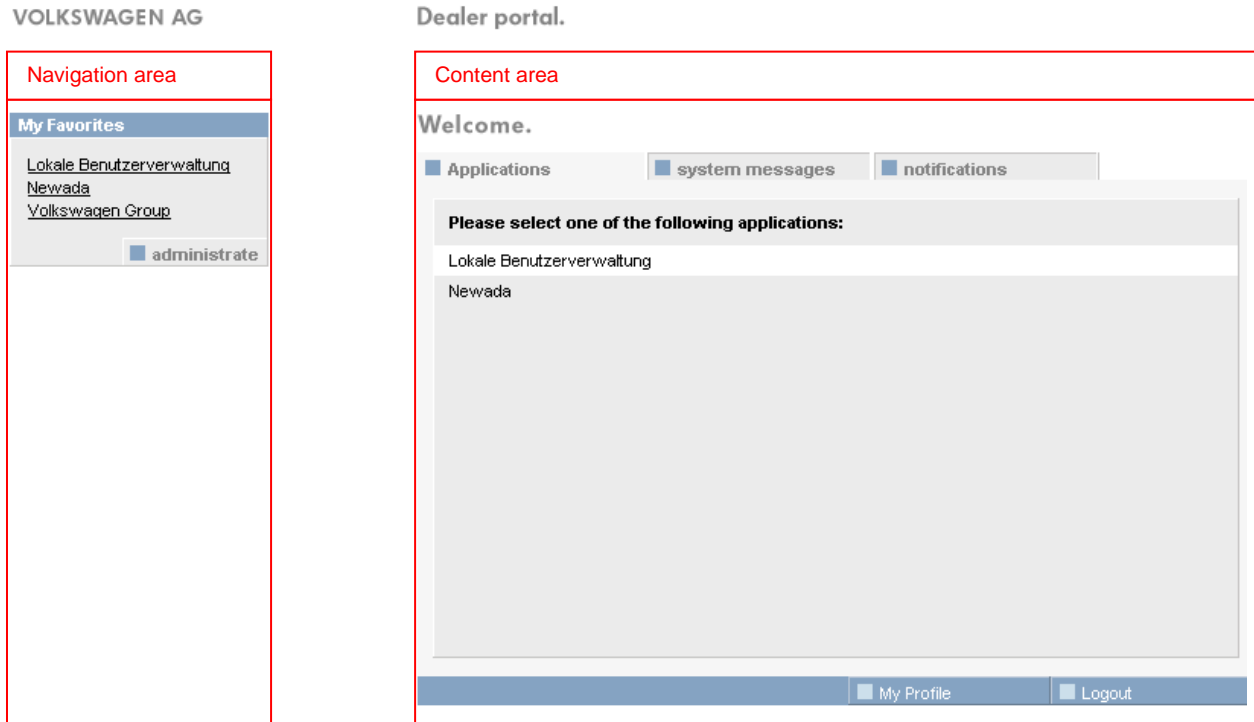


Figure 8 The portal start page

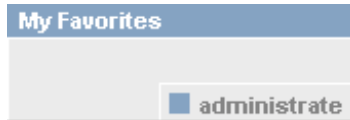
The portal is divided into two main areas with navigation area on the left and content area on the right.

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## 5.1 Navigation area

Initially the Navigation area contains only “My favorites”.



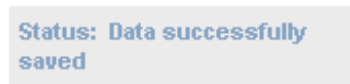
Here the user can add applications from the portal or any other desired links (see 5.1.1 *Add applications to “My favorites”*).



Example of a filled out list “My favorites”.

It depends on the login way (<http://portal.cpn.vwg> or <https://dealerportal.vw-group.com>) which applications in “My favorites” can be shown and worked with

There are messages below “My Favorites” which report about successful or unsuccessful saving operations. The following table shows some examples of such messages.




Saving was successful.



An unknown error occurred due to a problem in the system.

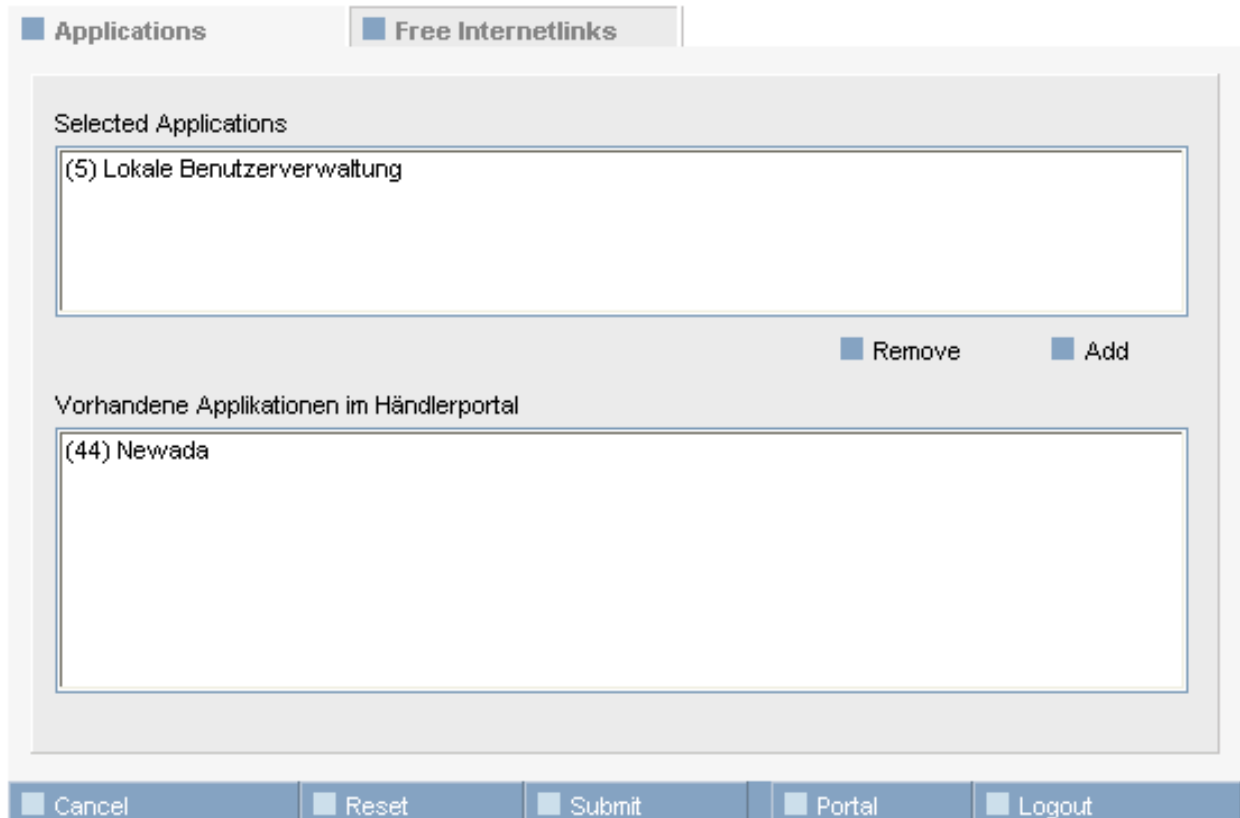
### 5.1.1 Managing favorites

If you wish to manage your favorites, please click on the  button, which you will find on the right side at the bottom of “My favourites” area. This action takes the user to a managing favorites window, where the tabs “Applications” and “Free internet links” are available.

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## 5.1.1.1 Add applications to “My favorites”

The tab “Applications” allows a user to add applications (available applications in the dealer portal list) to its favorites. The list of selected applications shows all the applications that are to appear in favorites.



**Figure 9 Favorites – applications**

In order to add an application to “My favorites”, please select it with the left mouse button in the bottom list and then click on . This will move the application to the upper list. Up to three applications can be added as favorites.

To remove an application, select it in the upper list and then click on .

To save changes, you should click on the  button, otherwise changes will be lost.

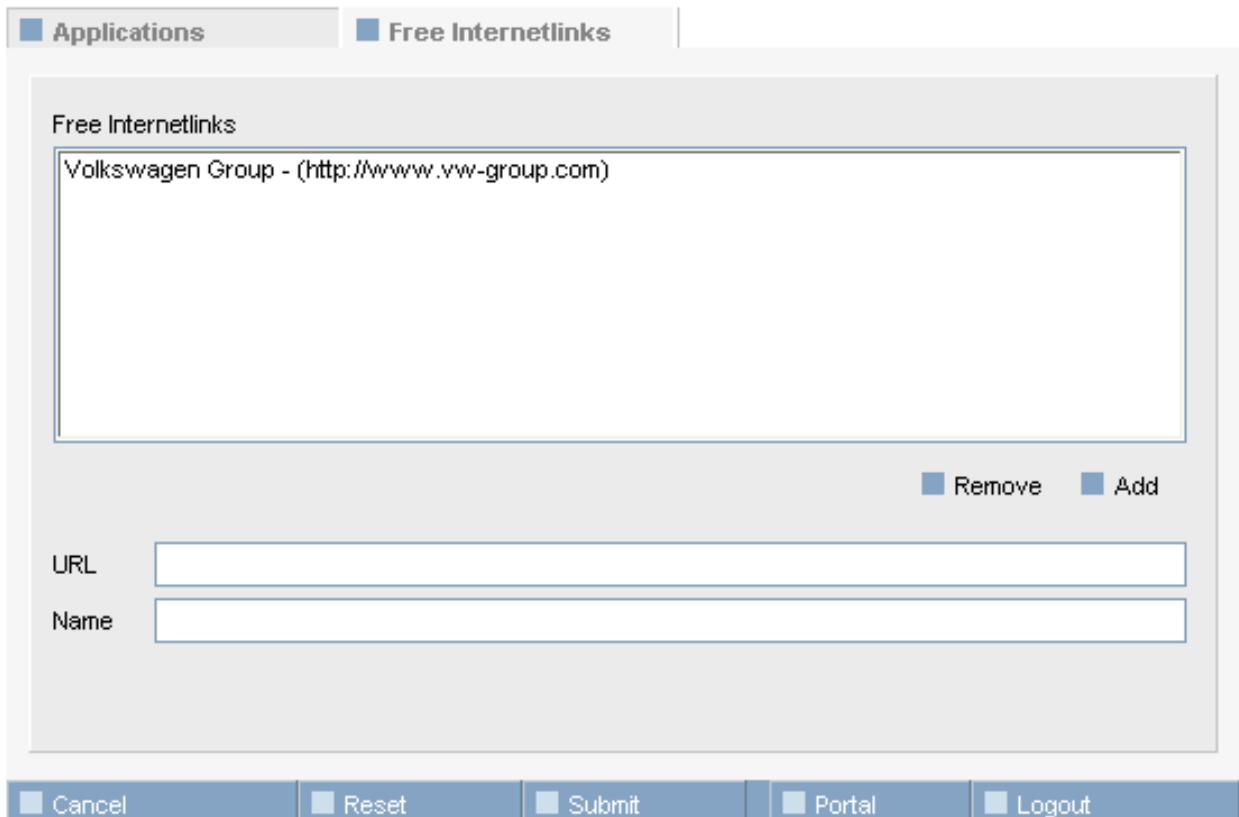


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## 5.1.1.2 Add external links to favorites

The “Free Internetlinks” tab allows you to add links to the favourites.



**Figure 10 Favorites – Internet links**

The URL text field is used to enter the desired web site. It is sufficient to enter the URL in the format `www.myfavourite.com`. The system will automatically add the “`http://`” prefix. If the link should lead to an encrypted page, the whole internet address including “`https://`” must be entered. Please enter the title of a favorite in the text field “Name”. This title will then appear in the list of favorites.

If you wish to add a link to the list, please press the  button. Up to 20 external links can be saved in “My favorites”. In order to remove links, please select one or more of the external internet links in the list above and then click on .

It is possible to switch between the two tabs without saving changes.

If you wish to save your changes, please press the  button, otherwise the changes will be lost.

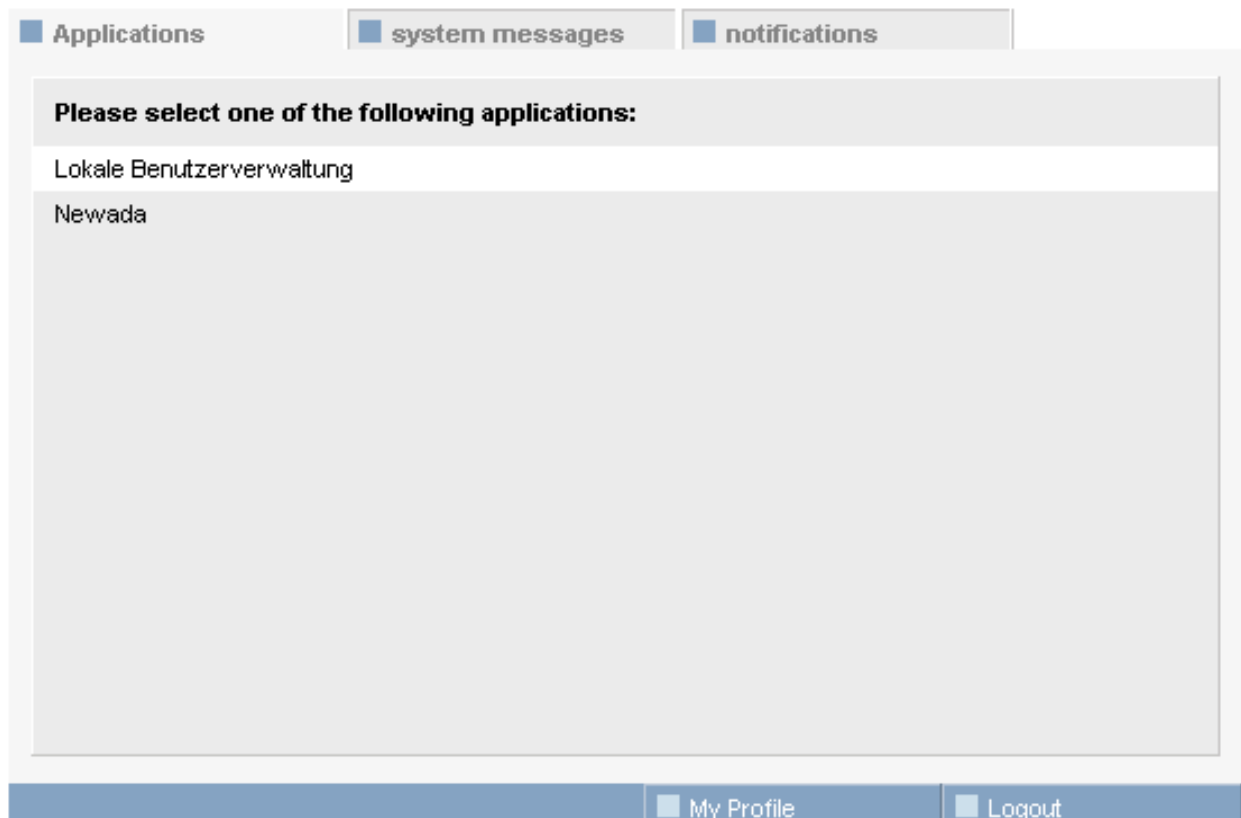
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## 5.2 Content area

The content area contains tabs in the part above. Below you will find the buttons, the number of which depends on the tab currently selected.

### 5.2.1 “Applications” tab



**Figure 11 «Applications» tab**

The “Applications” tab contains a list of all applications which a logged on user has access rights to. He/she can start an application by clicking on it.

Depending on the way the user has logged in (<http://portal.cpn.vwg> or <https://dealerportal.vw-group.com>) he/she will get visible only those applications which are available.

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## 5.2.2 “System messages” tab



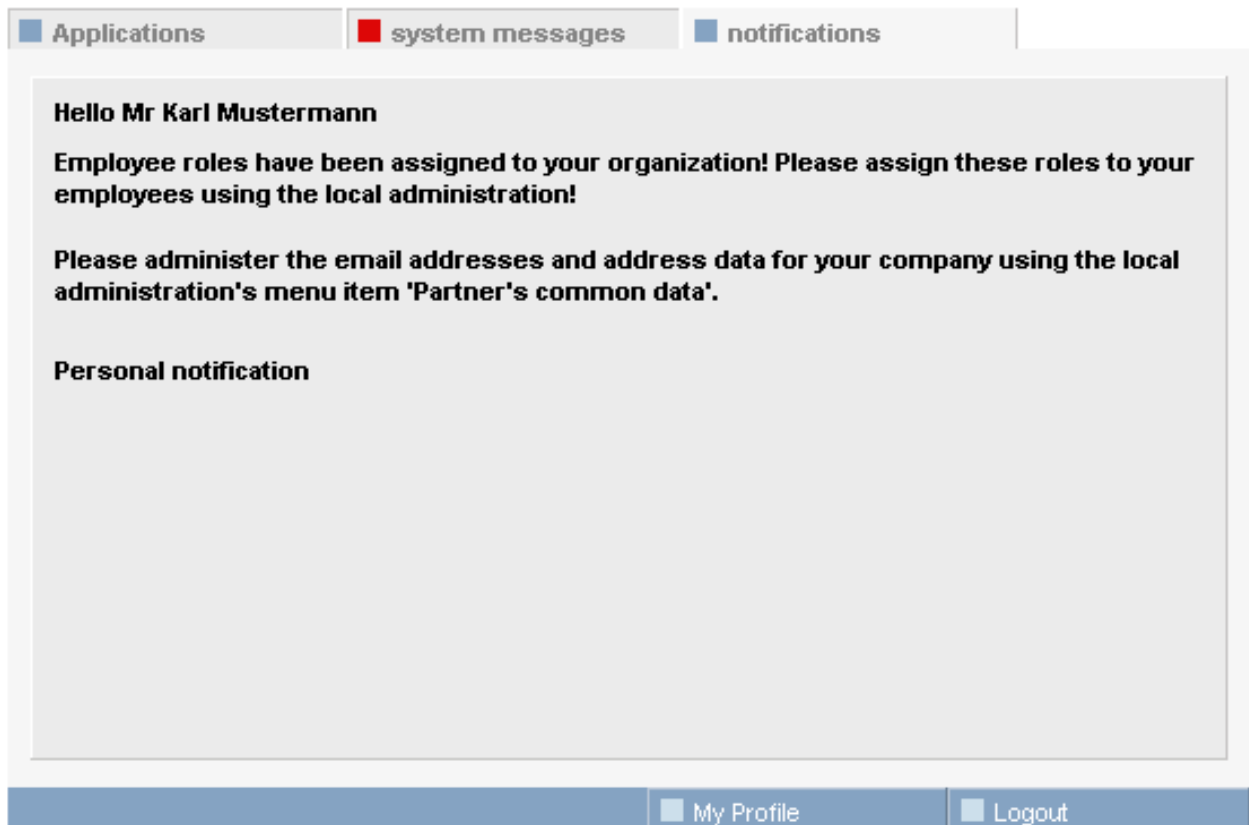
**Figure 12 System messages tab**

This tab shows current messages which can concern the whole system or just a single application. When a new system message appears, this tab is shown in red.

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## 5.2.3 “Notifications” tab



**Figure 13 “Notifications” tab**

The “Notifications” tab is used to welcome and inform users. In the above example a test person is asked to validate his/her email address. Additionally the local administrator in the user's car dealership has sent two personal notifications.

This tab is automatically shown on the portal start page when there are some notifications for the user. If there are no notifications, the tab “Applications” is shown instead.

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## 5.3 Input mask “My profile”

By clicking on  the user reaches “My profile” mask. Here he/she can view his/her personal data and edit some of it. The following two tabs are available here: “Profile” and “Your applications / roles”.

The screenshot shows a web interface with two tabs: "Profile" (selected) and "Your applications / roles". The main content area is titled "Edit user data of Mustermann" and contains the following fields:

- Organization: DE471110
- Salutation: Mr
- Title: (empty)
- Last name: Mustermann
- First name: Karl
- Password: [Change password](#)
- Direct dialing: 122
- FAX: 555
- Mobil-Phone: - (with a dropdown arrow and a help icon)
- WAP Password: (empty)

At the bottom of the form, there is a navigation bar with buttons: Cancel, Reset, Submit, Portal, and Logout.

Figure 14 Editing profile

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### 5.3.1 Tab “Profile”

In this tab a user can check and edit his/her master data. All entries in white text fields can be edited. Blue text fields can only be changed by the organisation local administrator.

**Edit user data of Mustermann**

Organization	DE471110
Salutation	Mr
Title	
Last name	Mustermann
First name	Karl
Password	<a href="#">Change password</a>
Direct dialing	122
FAX	555
Mobil-Phone	- [v] [ ]
WAP Password	
eMail	karl.mustermann@DE471110.vw-group.de
Language	English [v]
Birthday (dd.MM)	[ ] . [ ]
Department	Vertrieb/Service
Salesperson nr.	4711
Host User ID	
Sales status	
Account status	active

Figure 15 Profile with basic details tab

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## Language settings

If you change a language you will get all texts in the portal (including the login page) displayed in the selected language.

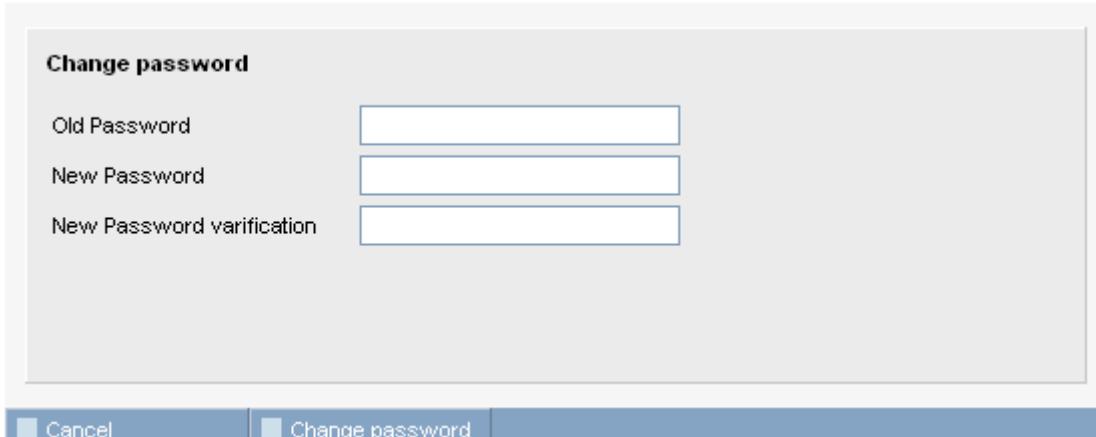
Please note that setting a language you cannot read could make the portal unusable.

How to enter mobile phone numbers is explained in section *8.2 Enter mobile numbers*.

If you wish to find information about validation of your email address please consult section *8.3 Validate an E-Mail Address*.

## Changing the password

You can change your password by clicking on the [Change password](#) link, which leads you to a new input mask.



The screenshot shows a web form titled "Change password". It contains three text input fields stacked vertically, labeled "Old Password", "New Password", and "New Password verification". Below the form is a blue bar containing two buttons: "Cancel" and "Change password".

**Figure 16 Change password**

Please enter your old password once and your new password twice.

The new password is only saved after you have pressed the [Change password](#) button.

### 5.3.2 Tab “Your applications / roles”

This tab informs the user about which roles and applications he/she has got assigned by the organisation local administrator.

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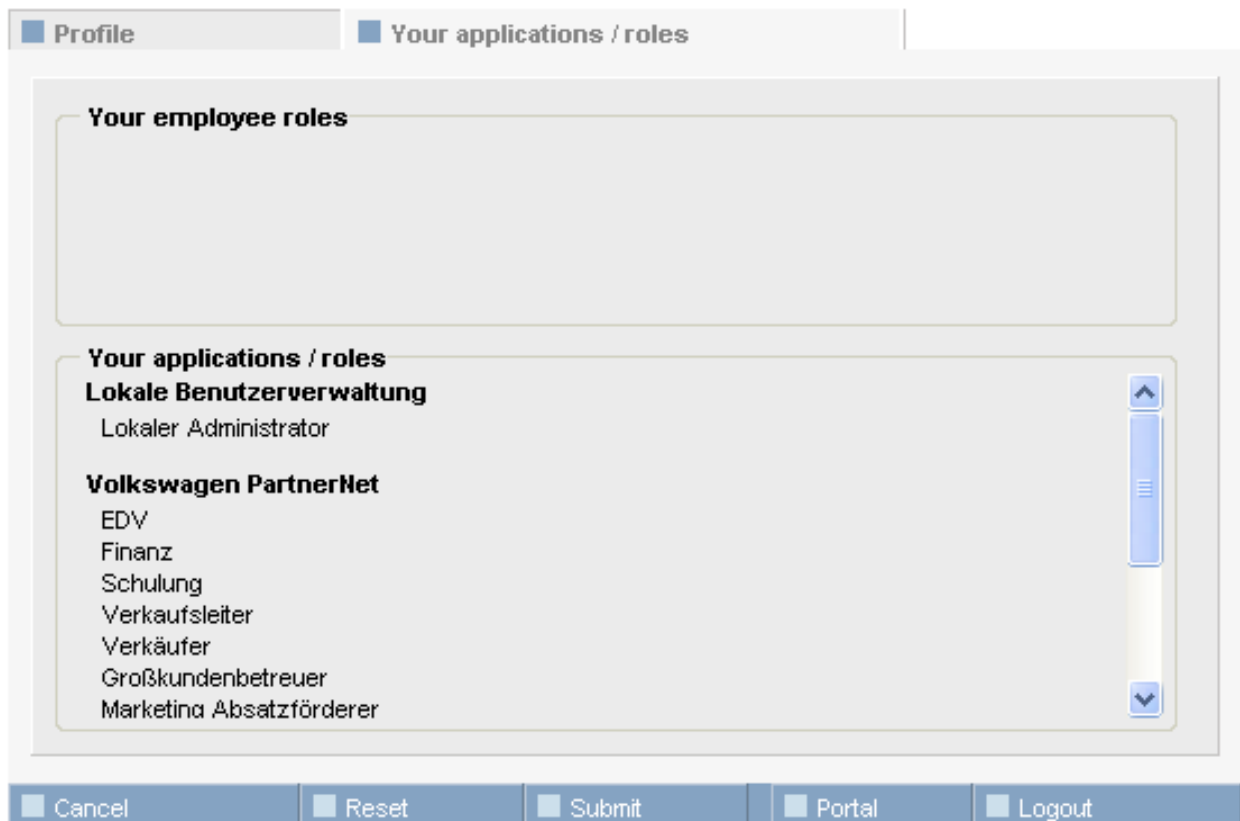


Figure 17 Assigned applications and roles



## 6 Local user administration

The local user administration is to be used by the local administrator to manage users of its organization. This includes creating, editing and deleting of user accounts, as well as managing applications and roles.

The activation of internet data administration makes it possible for an organization not only to administer the organisation-related data but also the internet-related data.

If an organisation has assigned employee roles, it is possible to assign these to users or to remove them from them.

The personal notification function allows the local administrator to send notifications to a user individually or to all the users of his/her organization (see 5.2.3 “Notifications” tab).

If you wish to start the application “Local User Administration”, please click on the link “Lokale Benutzerverwaltung” in the tab “Applications” on the portal start page.

Please note that local user administration is displayed as “Lokale Benutzerverwaltung” in all languages.

### 6.1 Menu items of the “Local User Administration”

#### Local administration

Partner's common data \*

Edit data of the organization \*

Manage employee roles \*

Create new user

Personal notifications

Assign applications

The activation of internet data administration enables the local administrator to use the menu item “Partner’s common data”. Otherwise the menu item “Edit data of the organisation” will be shown instead. These two menu items are never visible at the same time.

The “Manage employee roles” menu item is only available if the so called employee roles have been assigned to the organisation by a member of the support team or due to the contract conditions.

\*not always available

The menu items are explained below.

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## 6.2 User search

While start working with the local user administration the first thing you see is the user search mask (see *Figure 18 User search*). If you wish to switch to this mask from another menu, please click on the “local administration” in the menu (left side).

In the part above you can enter your search criteria. Below your search results will appear. You can edit or remove users shown in the list.

After having started the local administration, the search process is first carried out automatically. Therefore all the users of the corresponding organisation will be shown.

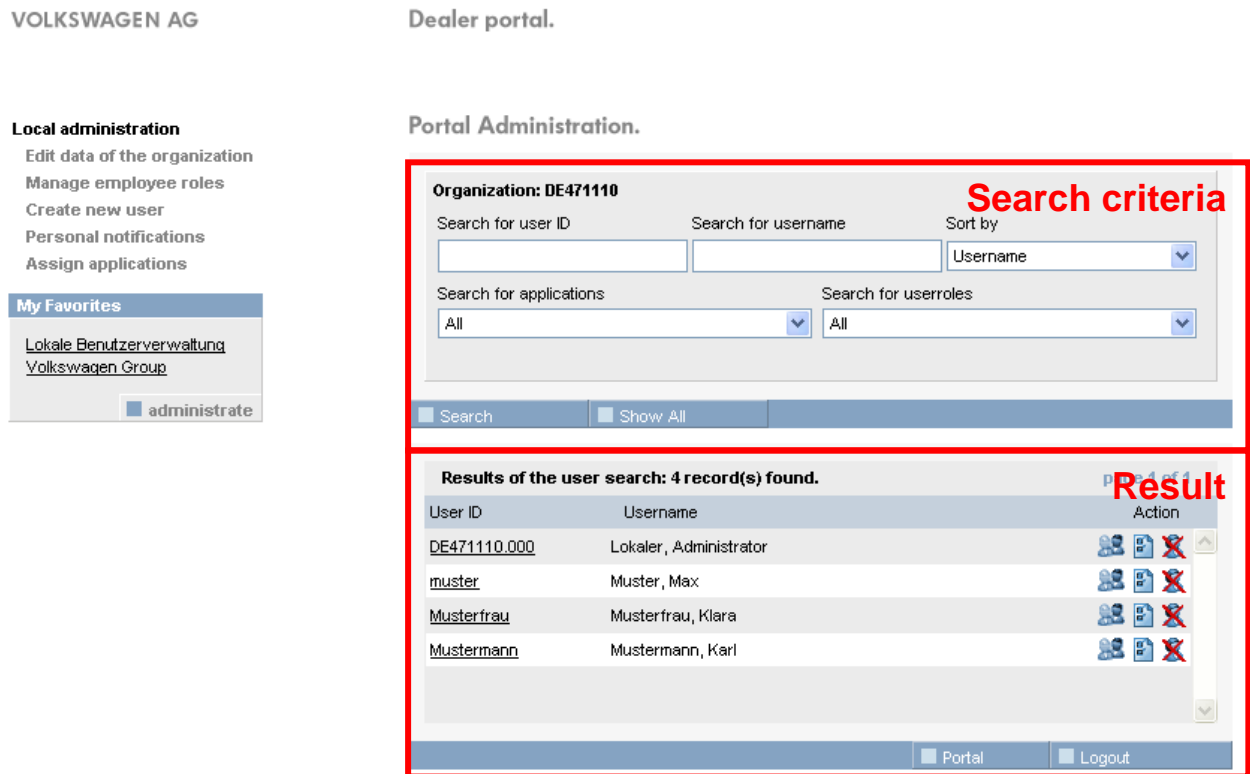


Figure 18 User search

### 6.2.1 Define search criteria

IDs or user names can be used as search criteria. Searching compares the entered text with the first letters of the user data. Searching for the user ID “Muster”, for example, would find “Muster”, “Musterfrau” and “Mustermann”. It does not matter whether you enter capital or small letters while searching.

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By means of the field “Search by ID” it is both possible to search using Global-UserIDs or User-IDs.


While searching according to user names ensure that only the first OR the last name has been entered (alternatively first few letters of the first or the last name can be entered). The search function will separately compare the entered texts with the saved first and last names. Due to this searching for “Max Musterman” would not bring any results, whereas searching using the letters “Must” would result in e.g. “Max Muster”, “Klara Musterfrau” and “Karl Mustermann”.

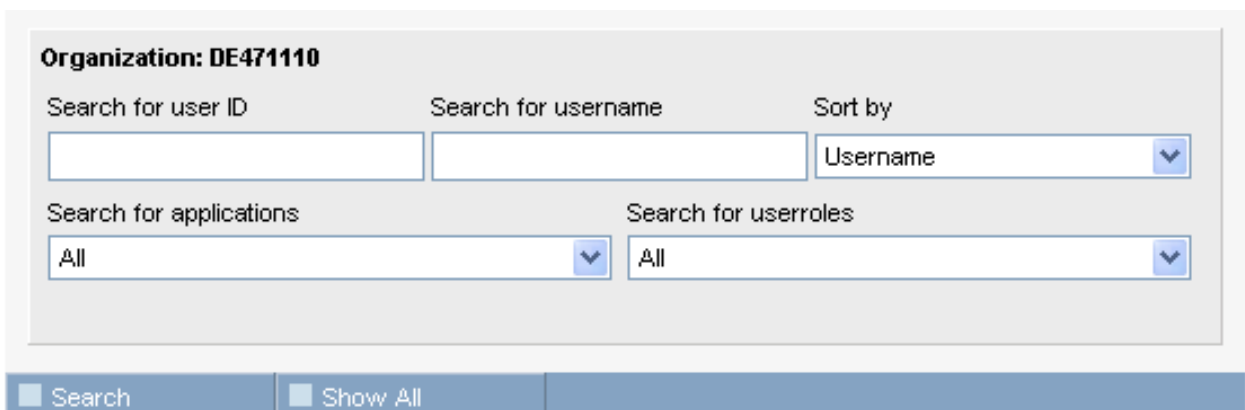
You can sort your search results according to the user names or Global-UserIDs using the “Sort by” dropdown list.

It is possible to search by user name using the assigned applications and/or roles. In this case the local administrator should select the corresponding entries from the “Search for applications” or “Search for user roles” dropdown lists.

All the entered search criteria will be taken into account while searching and only those users who satisfy these criteria will be displayed in the list of search results.

Please select the  button to start your search.

When you press the  button, the entry fields “ID” and “user name” will be cleared and the search process will start again showing all users.



The screenshot shows a search interface for the organization DE471110. It features several search criteria fields: 'Search for user ID', 'Search for username', 'Sort by' (set to 'Username'), 'Search for applications' (set to 'All'), and 'Search for userroles' (set to 'All'). At the bottom, there are two buttons: 'Search' and 'Show All'.

**Figure 19 User search – search criteria**



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## 6.2.1.1 Overview of results

The number of records found during the search process is displayed at the upper left part of the search area.


## 6.2.1.2 Browsing


When the number of found users exceeds 50, the results will be displayed on more than one page, so that it is more comfortable to work with the results. The total number of pages, the current page, as well as the buttons for turning pages on are located at the top right of the search area.


You can turn on the search result pages by means of the arrow buttons:  and . These buttons appear only if a previous/next page exists.

## 6.2.1.3 User list

The user list shows all the users which satisfy the search criteria. The results in this list are either sorted according to their user IDs or to their user names, depending on search criteria entered.

When you click on the GlobalUserID, user ID or on the  button, your master data and the applications which you have access to will be displayed. In this view you can edit them.

You can use the  button to get a compact overview of all your assigned applications and roles.

The  button enables you to delete a user after you have confirmed your wish in the dialog window, which appears after pressing this button.



**Overview of results**

Results of the user search: 4 record(s) found.

User ID	Username
<a href="#">DE471110.000</a>	Lokaler, Administrator
<a href="#">muster</a>	Muster, Max
<a href="#">Musterfrau</a>	Musterfrau, Klara
<a href="#">Mustermann</a>	Mustermann, Karl

**Browsing**

page 1 of 1

**User list**

Action
  
  
  
  

**Management functions**

Portal Logout

Figure 20 User search – search criteria

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## 6.3 Manage user details

This page consists of two tabs: "Master data" and "Applications". They will be explained in the following sections.

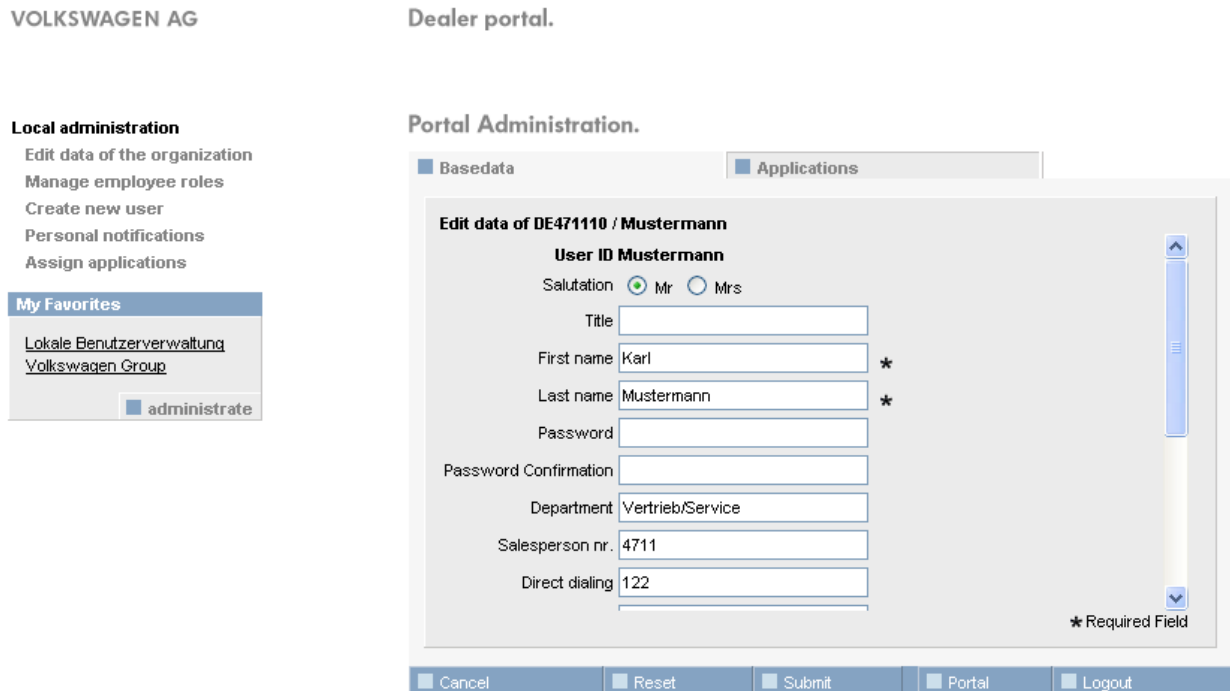


Figure 21 Editing user details

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## 6.3.1 Tab “Master data”

This tab allows a user to check and edit user details.

**Edit data of DE471110 / Mustermann**

**User ID Mustermann**

Salutation  Mr  Mrs

Title

First name  \*

Last name  \*\*

Password

Password Confirmation

Department

Salesperson nr.

Direct dialing

FAX

Mobil-Phone

WAP Password

eMail

Language  ▼

Host User ID

Sales status  ▼

TAMe Account Status

Account status  ▼ \*

\* Required Field  
\*\* The user can edit its personal profile

Figure 22 Editing user details –tab “Master data”

Personal user details can be edited in the white fields. Fields marked with an asterisk (\*) are mandatory (must be filled in). Fields marked with two asterisks (\*\*) can be edited only by the user himself/herself.

## Dealer Portal Handbook

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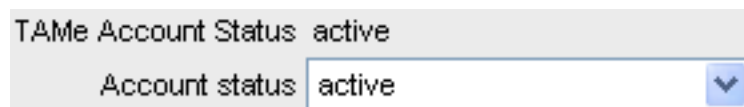
If a user has forgotten his/her password, the local administrator can supply him/her here with the new one.

How to enter mobile phone numbers is explained in section *8.2 Enter mobile numbers*.

If you wish to find information about validation of your email address please consult the section *8.3 Validate an E-Mail Address*.

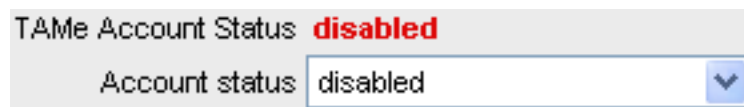
### 6.3.1.1 Account status

Here you can set the status of your account. Only users with an active account may log in to the portal.



The screenshot shows a grey header bar with the text "TAME Account Status active". Below this is a white input field with the text "Account status active" and a blue downward-pointing arrow on the right side.

Figure 23 Account status "active"



The screenshot shows a grey header bar with the text "TAME Account Status disabled", where "disabled" is in red. Below this is a white input field with the text "Account status disabled" and a blue downward-pointing arrow on the right side.

Figure 24 Account status "everything disabled"

User account status is one of the most important data managing instruments for a local administrator within his/her organisation.

It occurs that a local administrator needs to block a user account for internal reasons without deleting it so far. For this purpose he/she can change the user account status to "disabled", as shown in *Figure 24*.

# Dealer Portal Handbook

## 6.3.2 Tab “Applications”

For viewing the applications and roles assigned to a user, please click on the tab “Applications”.

Applications which the user has been assigned to via one or more roles are expanded by default, so that the roles within the applications are visible. The roles assigned to a user are indicated with selected check boxes. Those applications, which have not been assigned to a user, are shown as collapsed.

### Portal Administration.

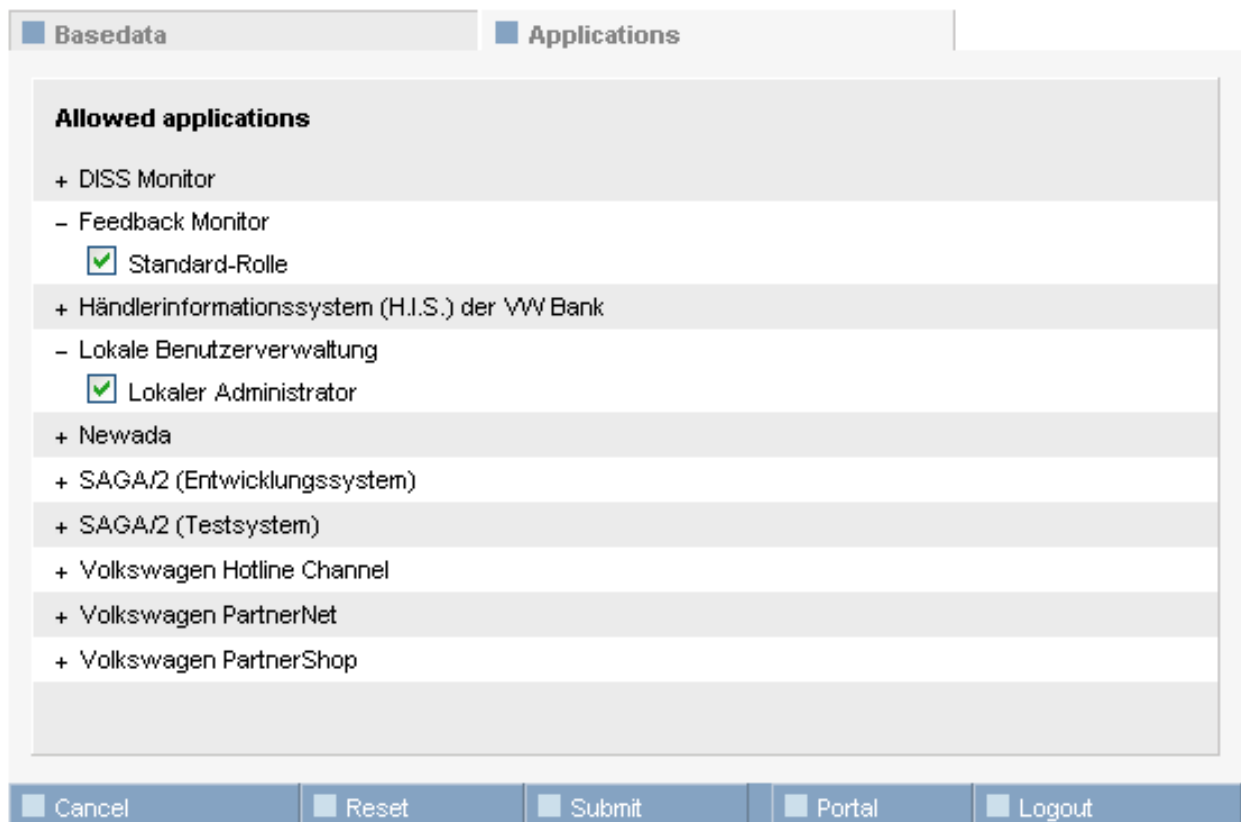


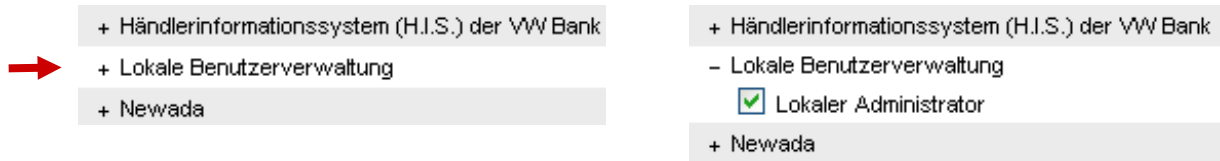
Figure 25 Editing user – applications

Displayed roles can be changed as required when you click on the + or – symbol that appears before the application name or when you click on the application name itself.



## Dealer Portal Handbook

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**Figure 26** Displaying more details

If the role details are visible to you, you can choose those which you want to assign to a user within the selected application. Alternatively the ticks can be withdrawn from the check boxes, if you do not want the user to work with this role or application any longer.

# Dealer Portal Handbook

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## 6.3.2.1 The roles that require obligatory authorization

Only local administrators can apply for the roles that require obligatory permissions. However permissions for such a role will be activated only after it has been authorized by the User Release Centre.

The roles that require obligatory permission are marked with red colour. An additional text “This role requires a further level of release authorisation” will be shown when you point on such a role with your mouse.

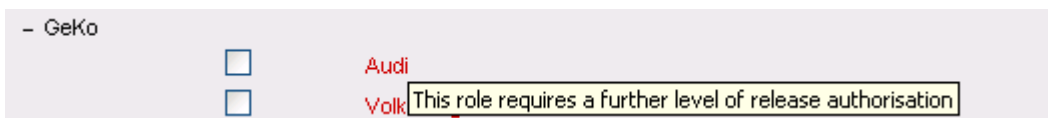


Figure 27 Mouse over a role that requires obligatory authorization

The local administrator can apply for such a role by means of placing a tick on the corresponding checkbox and saving it.

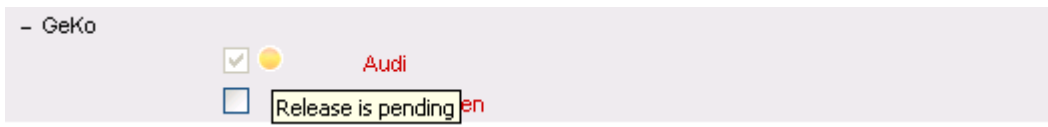


Figure 28 Mouse over a role that requires obligatory authorization

The role authorized by the User Release Centre is shown in the following figure:

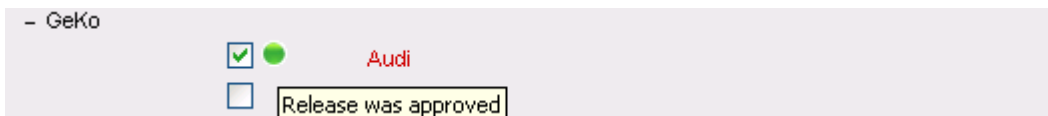
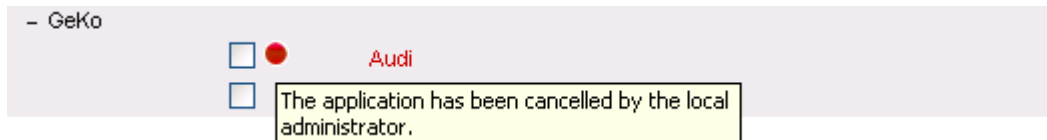


Figure 29 Mouse over a status sign, the role has been approved.

## Dealer Portal Handbook

A local administrator can withdraw an assigned role by means of removing the tick and saving the mask. If a local administrator applies for a role which requires an obligatory permission and which has been withdrawn once, the role must be authorized again.



**Figure 30** Mouse over a status sign. The role has been approved. Later is was withdrawn by the local administrator.

In the following table the symbols concerning the roles which require obligatory authorization are shown and described.

Symbol	Approval Status	Help Text concerning the Symbol
-	Not requested	-
	Requested <sup>2</sup>	The release is pending
	Rejected	The release was denied
	Approved	The release was approved
	Cancelled	Already approved role was withdrawn by the local administrator

<sup>2</sup> This Symbol can also appear if a you cannot apply for the role because the User Release Center for your Org-ID does not exist so far. In this case a help text: "No User Release Center available!" would be displayed.

# Dealer Portal Handbook

## 6.4 Partner's common data

The input mask for partner's common data is available via the corresponding menu item in the navigation area of local administration. Whether this menu item is visible or not for your organisation depends on the contract conditions. If this item is not visible for you, the menu item *“Edit master data of the organisation”* will be displayed instead. If this is the case you can skip this section.

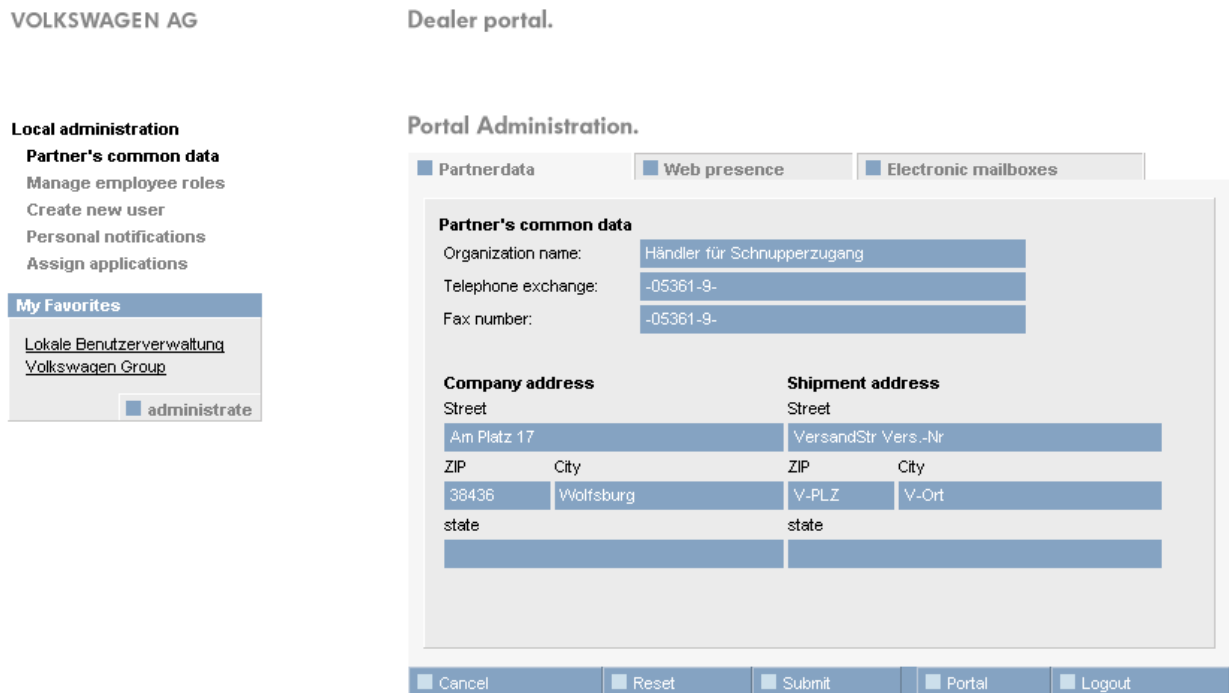


Figure 31 Partner's common data

Partner's common data is subdivided into three areas which are represented by three tabs in the content area: “Partner data”, “Web presence” and “Electronic mailboxes”.

# Dealer Portal Handbook

## 6.4.1 Tab “Partner’s data”

The partner’s data tab displays the organisation contact information identical to that in the contract, thus this data cannot be edited.

Partner's common data	
Organization name:	Händler für Schnupperzugang
Telephone exchange:	-05361-9-
Fax number:	-05361-9-

Company address		Shipment address	
Street		Street	
Am Platz 17		VersandStr Vers.-Nr	
ZIP	City	ZIP	City
38436	Wolfsburg	V-PLZ	V-Ort
state		state	

Buttons: Cancel, Reset, Submit, Portal, Logout

Figure 32 Partner’s data

## 6.4.2 Tab “Web presence”

The web presence tab gives the possibility to edit showroom and garage contact information. All these fields must be filled in. *Whether the showroom or garage areas are visible or not, depends on the dealer’s contract. In some case both areas will not be visible.*

# Dealer Portal Handbook

## Portal Administration.

The screenshot shows a web interface for 'Portal Administration' with three tabs: 'Partnerdata', 'Web presence', and 'Electronic mailboxes'. The 'Web presence' tab is active, displaying the 'Showroom' section. The 'Showroom' section contains the following elements:

- Showroom**: A heading followed by the instruction 'Please fill out the fields for your company's showroom.'
- Common data**: A sub-heading followed by two text input fields: 'Organization name:' and 'Company address:'. The 'Company address:' field is split into two adjacent boxes.
- Communication**: A sub-heading followed by two text input fields: 'Telephone exchange:' and 'Fax number:'.
- preallocate fields**: A button with a small blue square icon to its left.
- Instructions**: A note stating 'Please insert one telephone and one fax number. Please use this format: International code, area code, number, direct dialing.'
- Warning**: A note at the bottom left stating '\*All fields are required.'

At the bottom of the form, there is a navigation bar with five buttons: 'Cancel', 'Reset', 'Submit', 'Portal', and 'Logout'.

Figure 33 “Web presence” tab – “Showroom” area

### Take-over of partner’s data

For simplification of working process it is possible to take over the information about the showroom and garage area from the existing partner common data into the mask displayed above. In order to do this, please click on the  button. If other text has already been entered in the text fields, a dialog window will appear asking if it should be overwritten.

# Dealer Portal Handbook

The screenshot shows a web interface with three tabs: 'Partnerdata', 'Web presence', and 'Electronic mailboxes'. The 'Web presence' tab is active. Below the tabs is a 'Garage' section with the following content:

**Garage**  
Please fill out the fields for your company's garage.

**Common data**

Organization name:

Company address:

preallocate fields

**Communication**

Telephone exchange:

Fax number:

Please insert one telephone and one fax number. Please use this format:  
International code, area code, number, direct dialing.

★ All fields are required

At the bottom of the form are five buttons: Cancel, Reset, Submit, Portal, and Logout.

Figure 34 "Web presence" tab – "Garage area"

# Dealer Portal Handbook

## 6.4.3 “Electronic mailboxes” tab

In the tab “Electronic mailboxes” you can enter email addresses concerning web presence and scheduler information of all assigned brands. It is obligatory for each brand to fill in the scheduler information field.

If you wish to enter an email address for a particular brand, please select the corresponding brand from the drop-down menu. Then use the text fields below to enter the email address for that brand. The email address entered in this field will then be accepted for the chosen brand. The data of other brands will not be visible at that moment, but you can work with it later on. The procedure described above must be carried out for each brand.

**Your company's mailboxes ...**

Brand

... for web presence

This mailbox is shown in the web for a customer's approach. e.g. on the web presence **www.volkswagen.de**

... for scheduler information  \*

This mailbox ist used by Volkswagen group to inform schedulers at partner companies. We need this information to ensure a smooth communication within scheduling further on.

\*

mailbox scheduler's deputy

\* Required Field

Cancel Reset Submit Portal Logout

Figure 35 Electronic mailboxes

In order to save the new data or changes on all tabs, please click on the  button. If you have forgotten to fill out a field or have entered some data incorrectly in one of the tabs, the corresponding notification will be displayed.

### Message texts

The following messages concern fields filled out incorrectly or incompletely in any of the three tabs of “Partner's common data”.



# Dealer Portal Handbook

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## Possible messages in the “Web presence” tab

### Showroom:

- Organisation name not specified
- Street not specified
- ZIP code not specified
- City not specified
- State not specified
- Please enter a telephone number of the showroom
- Please enter a fax number

### Garage area:

- Organisation name of the garage not specified
- Street of the garage not specified
- ZIP code of the garage not specified
- City of the garage not specified
- Country of the garage not specified
- Please enter a telephone number of the garage
- Please enter a fax number of the garage

Please switch to the “Web presence” tab and enter the necessary details.

## Possible messages in the “Electronic mailboxes” tab

- Scheduler email is wrong or missing
- Scheduler's deputy email is wrong or missing

Please switch to the “Electronic mailboxes” tab and enter the necessary details.

## Dealer Portal Handbook

### 6.5 Edit master data of the organisation

You can come to the input mask for organisation master data via the menu item “Edit master data of your organisation” located in the navigation area of local administration.

**Edit data of: DE471110**

Organization name: Händler für Schnupperzugang

eMail: email@partnernet.de

Telephone exchange: -05361-9-

Fax number: -05361-9-

Company address		Shipment address	
Street		Street	
Am Platz 17		VersandStr Vers.-Nr	
ZIP	City	ZIP	City
38436	Wolfsburg	V-PLZ	V-Ort
state		state	

Cancel Reset Submit Portal Logout

**Figure 36 Edit data of the organisation**

You can change email and dispatch address of your organisation in this input mask. The filling out of these fields is optional. For example you can leave the dispatch address empty especially when it is identical with the company address.

# Dealer Portal Handbook

## 6.6 Manage employee roles

You can manage employee roles via the “Manage employee roles” menu item in the navigation area of local administration. With the help of this input mask it is possible to assign users to various organisation employee roles. Each employee role must be assigned to at least one user. There are some employee roles which can be assigned to one user only.

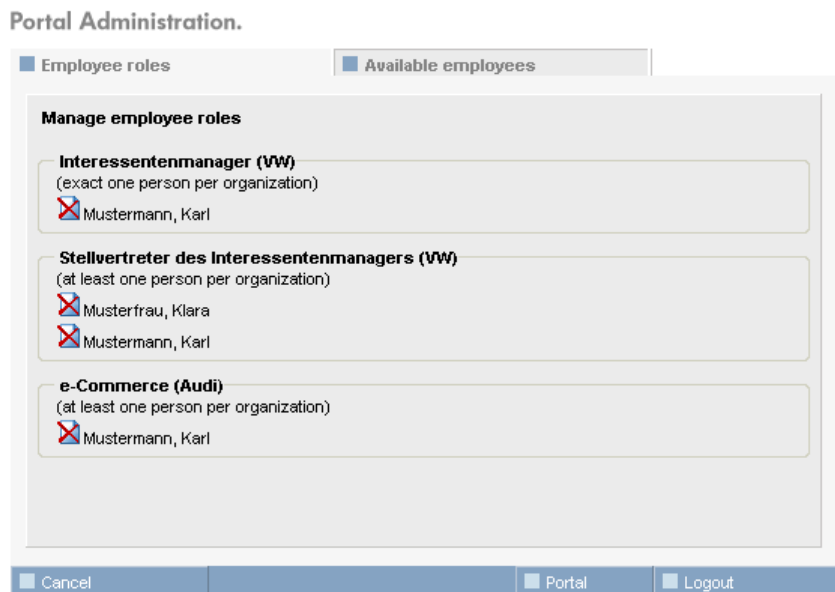
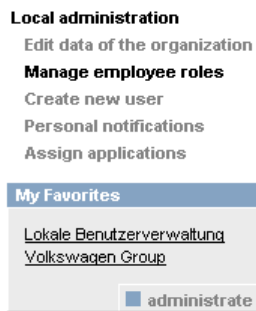


Figure 37 Manage employee roles

# Dealer Portal Handbook

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## 6.6.1 Tab “Employee roles”

The tab “Employee roles” contains a list of all available employee roles and the users to which they have been assigned. It is also shown here how many people are assigned or must be assigned to each role.

Example:

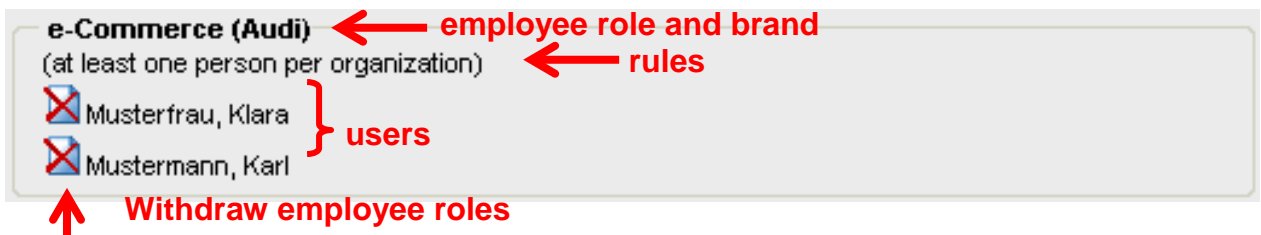



Figure 38 Managing employee roles – information

To withdraw an employee role click on the  button next to the user's name. A dialog window will be shown which will display detailed information about this employee role and the user. You will also be asked to confirm the role withdrawal.

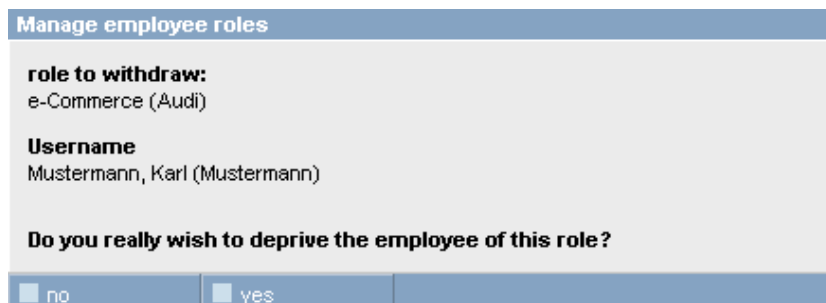


Figure 39 Withdraw employee roles

# Dealer Portal Handbook

## 6.6.2 Tab “Available employees”

In this tab you can assign employee roles to available users.

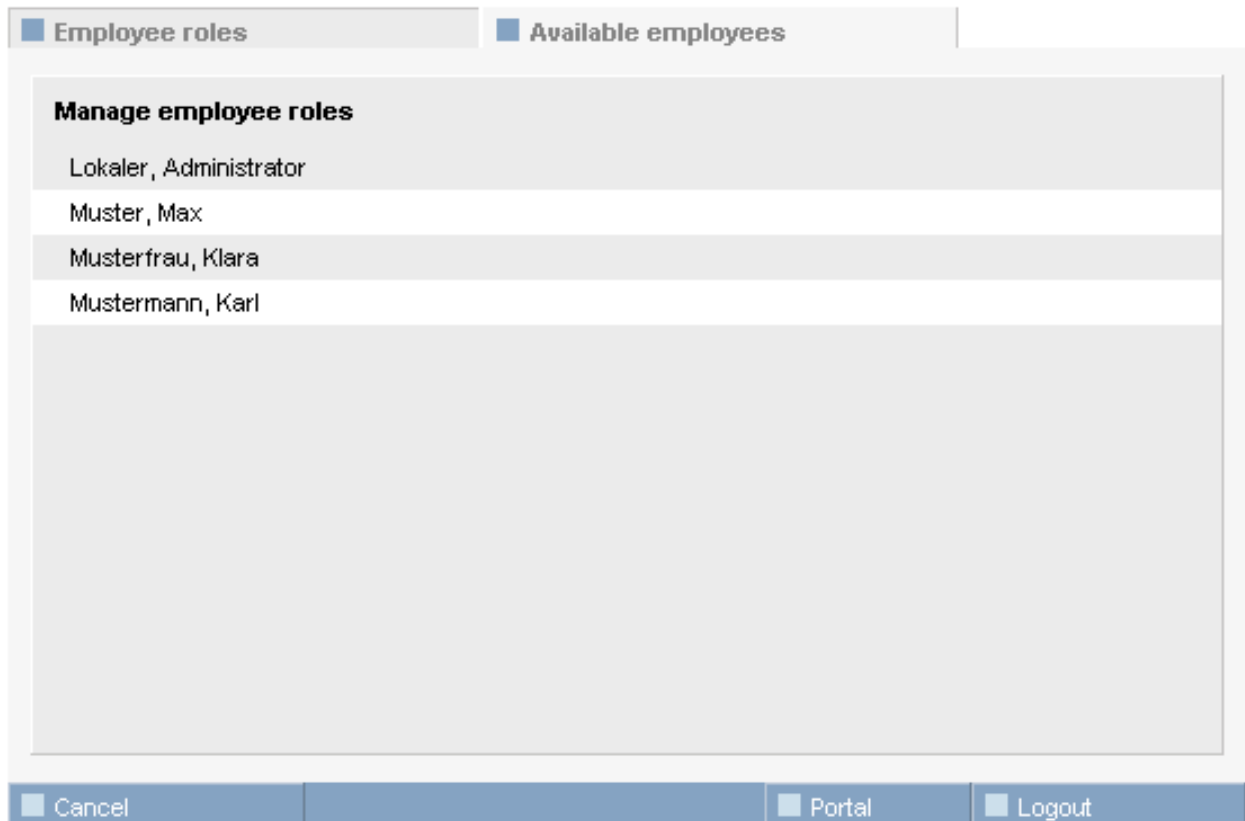


Figure 40 “Available employees” tab

In order to assign an employee role to an employee, please click on the user name first, then choose the desired role from the window that appears.

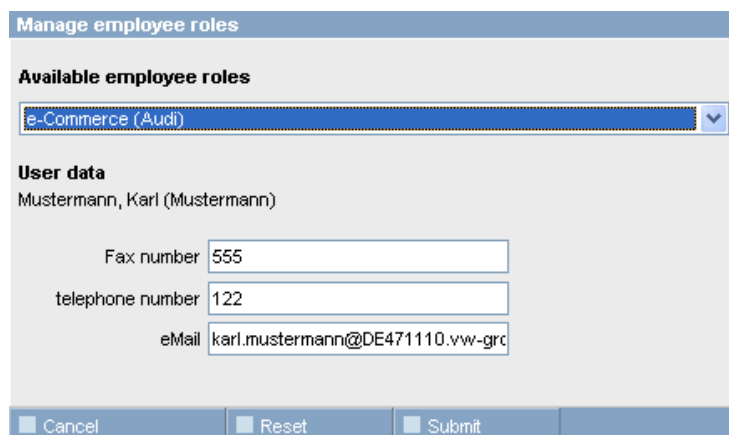


Figure 41 Pop Up Window “Assign employees”

# Dealer Portal Handbook

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Users with employee roles assigned need to have a fax number, a telephone number and an e-mail address. These details can be completed or edited by the local administrator in the pop up window.

If a new role has been assigned to an employee, he/she will be automatically informed per email.

If the email validation is activated for an organisation and an employee's email address gets changed during role assignment process, the employee will receive another validation email.

If the role assignment process has not been completed or if an employee role has been assigned too often, following messages can appear below the favourites.

**Your role assignment is incomplete! Please review your specifications!**

Each employee role must be assigned to at least one user. This message appears for example if the last user has been withdrawn from an employee role. In this case please assign a new user to the role.

**You have assigned too many employees to at least one role! Please review your specifications!**

This message is shown when an employee role that can be assigned to only one user, has been assigned to more users.

**Your role assignment is incomplete und you have assigned too many employees to at least one role! Please review your specifications!**

This message is shown when an employee role has not been assigned yet and when an employee role has been assigned too often.

# Dealer Portal Handbook

## 6.7 Create a new user

A local administrator can create new users using this menu item. While creating new users, you can set user details and access rights. The input mask consists of two tabs: “Master data” and “Applications”.

### Local administration

- Edit data of the organization
- Manage employee roles
- Create new user**
- Personal notifications
- Assign applications

### My Favorites

- Lokale Benutzerverwaltung
- Volkswagen Group

■ administrate

### Portal Administration.

■ Basedata   ■ Applications

**Create a new user in the organization DE471110**

User ID  \*

Salutation  Mr  Mrs

Title

First name  \*

Last name  \*

Password  \*

Password Confirmation  \*

Department

Salesperson nr.

Direct dialing

\* Required Field

■ Cancel   ■ Reset   ■ Submit   ■ Portal   ■ Logout

Figure 42 Create a new user

# Dealer Portal Handbook

## 6.7.1 Tab “Master data”

In the master data tab you can enter details of a new user.

### Portal Administration.

**Create a new user in the organization VW1111**

Global-UserID Will be requested

Desired G-UID

Salutation  Mr  Mrs

Title

First name  \*

Last name  \*

Password  \*

Password Confirmation  \*

Identity card number  (Last three digits) \*\*

Date of birth  .  .  (DD.MM.YYYY) \*\*

Department

District

Salesperson nr.

Direct dialing

FAX

Mobil-Phone

WAP Password

eMail

Status: no mailbox specified

Language

Host User ID

Sales status

TAME Account Status

Account status  \*

\* Required Field  
\*\* The user can edit its personal profile

Cancel Reset Submit Portal Logout

Figure 43 Create a new user – Tab “Master data”



## Dealer Portal Handbook

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Local administrator can enter user personal details into the white text fields. The fields marked with an asterisk (\*) must be filled out. Fields marked with two asterisks (\*\*) can be administrated by the user himself/herself.

Creating a new user you must enter a password. Password entering is not necessary for example when you merely edit user data.

How to enter mobile phone numbers is explained in section *8.2 Enter mobile numbers*.

If you wish to find information about validation of your email address please consult section *8.3 Validate an E-Mail Address*.

When the process of a new user creation has been completed, a new Global-UserID will be applied for him/her.

### **6.7.2 Tab “Applications”**

The description for the applications tab you will find in section *6.3.2, Tab “Applications”*.

# Dealer Portal Handbook

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## 6.8 Personal notifications

“Personal notifications” function is no longer supported by Dealer Portal.

# Dealer Portal Handbook

## 6.9 Assign applications

A local administrator can use menu item “Assign applications” in the navigation area of local administration to assign or withdraw access rights to/from several users at a time.

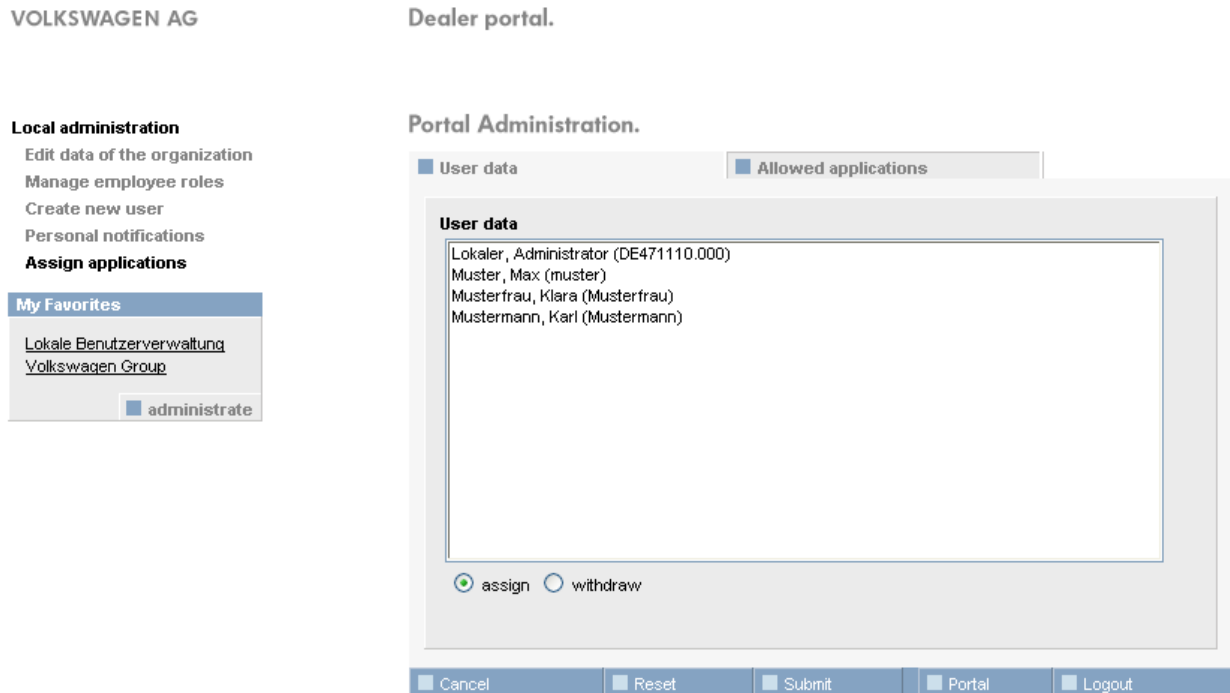


Figure 44 Assign applications

Please select from the list a user whom you want to assign a role to or withdraw it from. For multiple selections, see section 8.1 *Multiple selections in list boxes*.

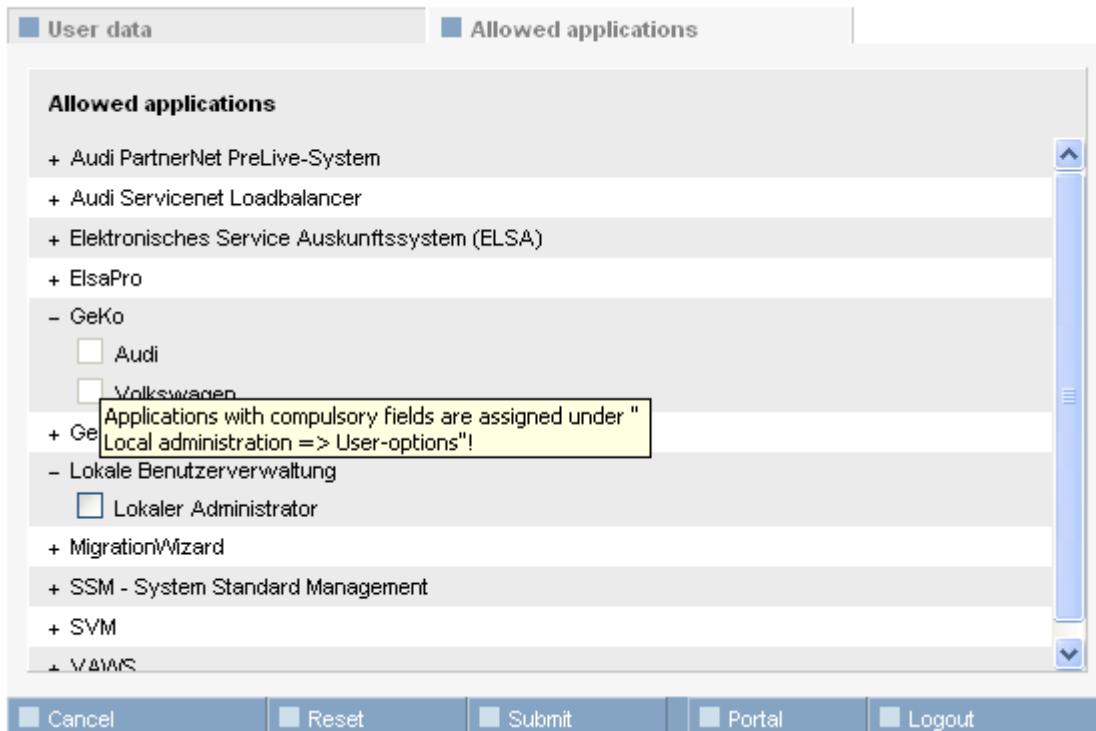
Depending on whether application access rights need to be assigned or withdrawn to the selected users, the administrator clicks the corresponding button below the user list:  assign  withdraw

Once users have been selected, applications and roles must be chosen in the “Allowed applications” tab. The selected users in the list will remain selected when switching between tabs.

The “Allowed applications” tab presents a list of applications and roles that should be familiar to the local administrator from managing user administration. If you click the  button you will assign or withdraw an application access right to/from selected users.

# Dealer Portal Handbook

## Portal Administration.



**Figure 45 Allocation of applications**

Subjected to authorization roles and applications with compulsory fields will be displayed as not assignable. For this reason you will also not be able to select these roles and applications. A help text will appear when the mouse crosses over the role/application.

Text displayed for subjected to authorization roles:

Roles subject to approval can be requested under "Local Administration"!

Text displayed for application with compulsory fields:

Applications with compulsory fields are assigned under "Local Administration – User-Options"!

## 7 Quick reference for local user administration

Here you will find quick help for different procedures that are available in local user administration. First of all, you should log into the portal and start local user administration.

### 7.1 Organisation

#### 7.1.1 Edit partner data of your own organisation

- Menu item "Edit data of the organisation"

This menu item is visible only in case of internet administration being deactivated for your organisation.

Details: Section 6.5 *Edit master data of the organisation*

#### 7.1.2 Edit web presence of your own organisation

- Menu item "Partner's common data"
- Tab "Web presence"

This menu item is visible only in case of internet administration being activated for your organisation.

Details: Section 6.4.2 *Tab "Web presence"*

#### 7.1.3 Edit electronic mailboxes for your own organisation

- Menu item "Partner's common data"
- Tab "Electronic mailboxes" (See 6.4.3 *"Electronic mailboxes" tab*)

This menu item is visible only in case of internet administration being activated for your organisation.

### 7.2 User

#### 7.2.1 Create a new user

- Menu item "Create a new user"

Details: Section 6.7 *Create a new user*

# Dealer Portal Handbook

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## 7.2.2 Edit an existing user (basic details, applications and access rights)

- Search for a user (details: Section 6.2 *User search*)
- Click on ID in the search result list
- Edit the master data or switch to tab “Applications” to edit user's rights


Details: Section 6.3 *Manage user details*

## 7.2.3 Assign / withdraw rights to/from several users in one step

- Menu item “Assign applications”
- Select all users to be edited
- Select “assign” or “withdraw”
- Change to the tab “Allowed applications”.
- Select the corresponding applications / roles

Details: Section 6.9 *Assign applications*

## 7.2.4 Delete an existing user

- Search for a user (details: Section 6.2 *User search*)
- Click on the  button in user's row

## 7.2.5 Assign an employee role to a user

- Menu item “Manage employee roles”
- Tab “Available employees”
- Select employees
- Select employee roles

Details: Section 6.6 *Manage employee roles*

## 7.2.6 Withdraw an employee role from a user

- Menu item “Manage employee roles”
- Click on the  button in user's row

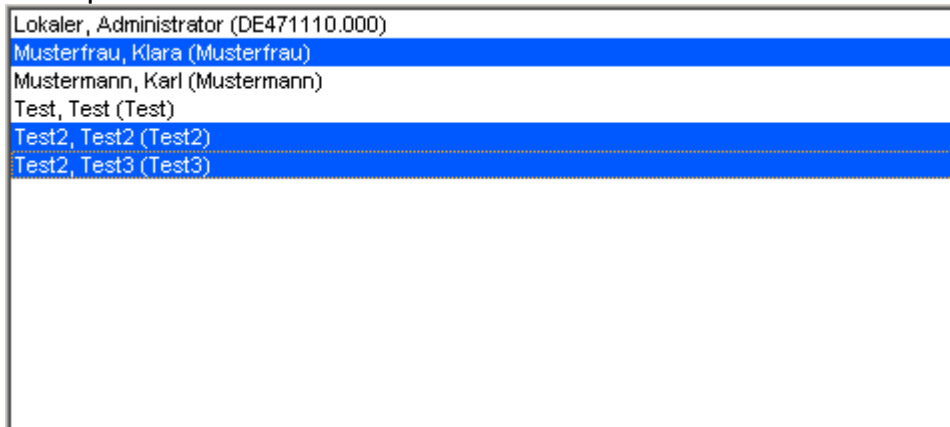
Details: Section 6.6 *Manage employee roles*

## 8 Additional information

### 8.1 Multiple selections in list boxes

In some cases it is necessary to make multiple selections.

Example:



**Figure 46 Multiple selection**

In this example the blue list entries are selected.

There are two ways to make multiple selections:

- Selecting a contiguous block of elements
- Selecting individual, non-contiguous elements

These two methods can also be combined.

Please note that the two possibilities described above will only work in the list specially designed for multiple selection.

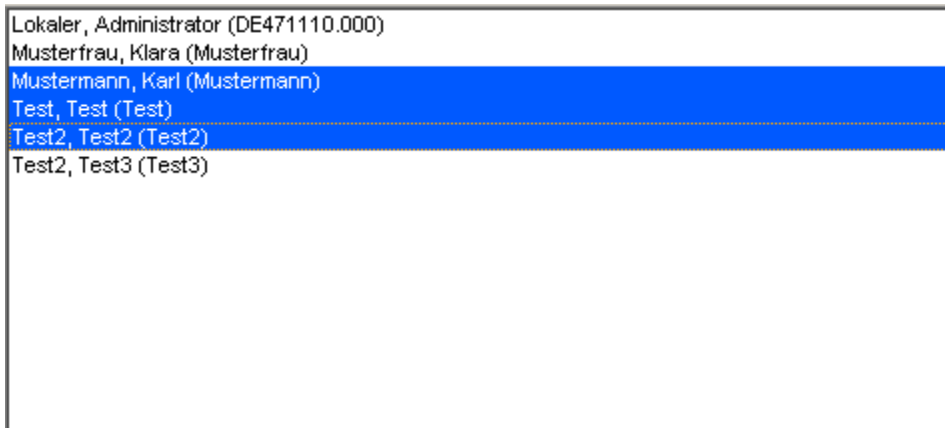
# Dealer Portal Handbook

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## Select a contiguous block of elements

Example:

Let's assume your wish is to select all names between "Mustermann, Karl" and "Test2, Test2".



**Figure 47 Select a contiguous block**

Please use the left mouse button to click on the name "Mustermann, Karl"; keep the button pressed until you have moved the mouse down to the name "Test2, Test2", then release. All the selected names are now coloured in blue.



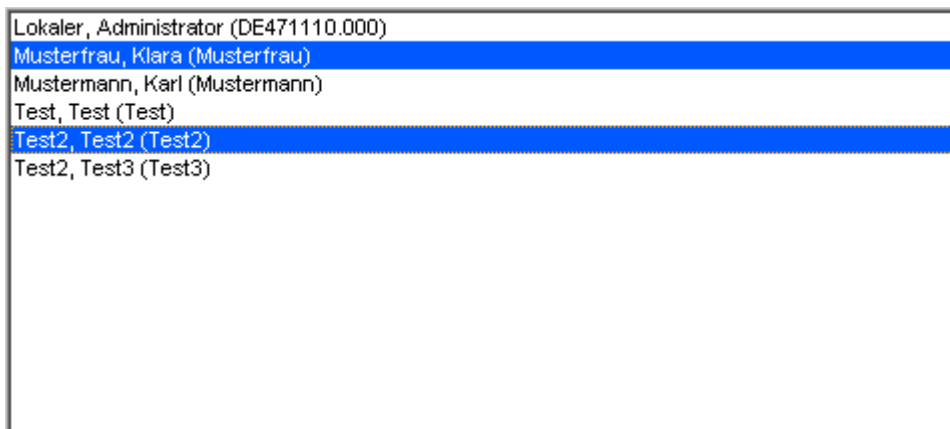
# Dealer Portal Handbook

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## Select individual, non-contiguous elements

Example:

Your wish is to select the names “Mustermann, Karl” and “Test2, Test2”.



**Figure 48 Multiple selection with “Ctrl”**

Please select the first name, “Mustermann, Karl”. Now press the “Ctrl” key on your keyboard, hold it down, and click on the name “Test2, Test2”. While keeping the key “Ctrl” pressed you can carry on selecting, until all the required objects have been selected.


If you click on a specific name several times while keeping the “Ctrl” key pressed, you will switch between selecting the name and cancelling your selection. You can use this feature to remove names which were accidentally selected.

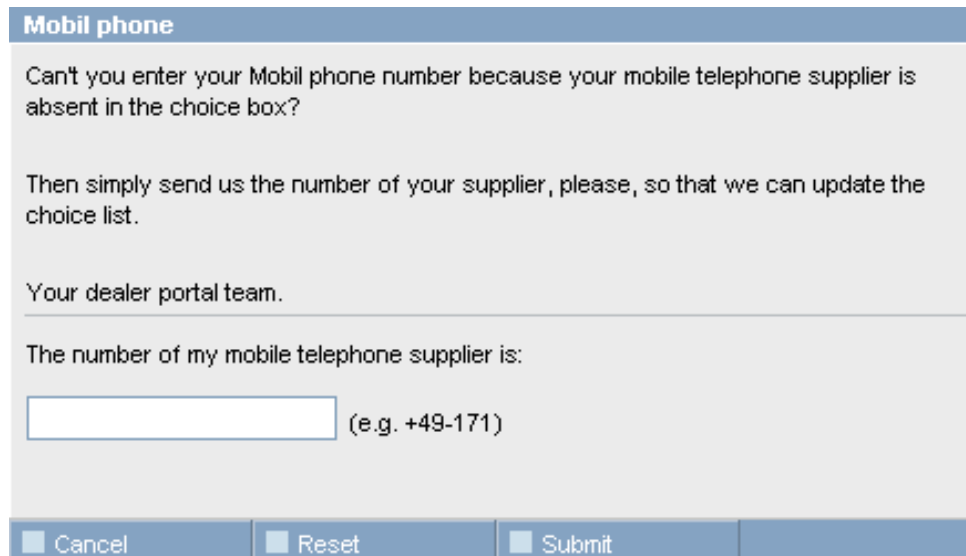
# Dealer Portal Handbook

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## 8.2 Enter mobile numbers

A mobile phone number can be saved only with the prefix number of a mobile phone supplier. If the prefix number is not available from the list of mobile phone suppliers you can apply for it addressing the support team. Then a member of the support team will check the prefix number and make it available in the portal.

The dialog window requesting a new mobile phone supplier prefix number will appear if you click on the  button next to the input field.



**Mobil phone**

Can't you enter your Mobil phone number because your mobile telephone supplier is absent in the choice box?

Then simply send us the number of your supplier, please, so that we can update the choice list.


Your dealer portal team.


---

The number of my mobile telephone supplier is:

(e.g. +49-171)

**Figure 49 Request for a new mobile phone supplier prefix number**

This dialog window allows the prefix number to be entered (e.g. +49-171). The  button will save the number.

The  button closes the dialog window and discards the number.

The  button clears the input field.

# Dealer Portal Handbook


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## 8.3 Validate an E-Mail Address


*The email validation function has been activated for all organisations of dealer portal with beginning of 2019.*

Due to this function you can check whether the stored email address is valid. An email will be sent to the given address.

The link contained in this email will lead you to the portal. After successful login a message will appear under your favourites. It will confirm that the email address has been successfully validated.

In order to validate an email address, please use the  button next to the entry field.

Note that click on this button will not save any data that may have been changed!

Further information on validation is shown by clicking on the  icon next to the entry field.

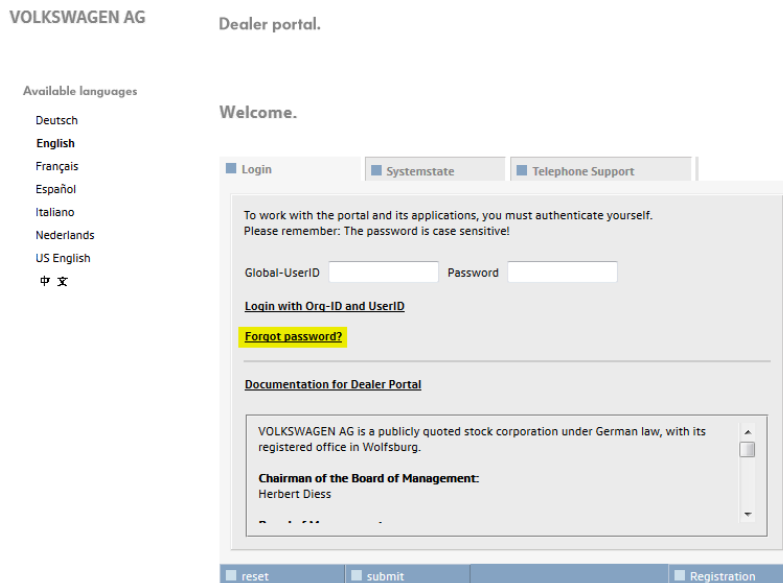
Under the entry field for the email address the status of the email validation is shown. If the email address was successfully validated, the button for manual validation is not visible. The button will only get available again after a user or an administrator has changed the email address and saves the changes. In this case an automatic validation mail will be send to the stored address. You can repeat this by clicking the validation button manually.

## 8.4 Using the Password Self Service (PWSS)

A successfully validated email address is the precondition for using the “Password Self Service”. See previous section to do this.

If you forgot your password or the account is locked due to too many failed attempts you can use this function to reset your password and reactivate your account. If a correct mail address is used and successfully validated you do not need an administrator anymore.

# Dealer Portal Handbook



After clicking the “forgot password?” link below the login fields you will be asked to enter the mail address used for your account.

## Password Self Service

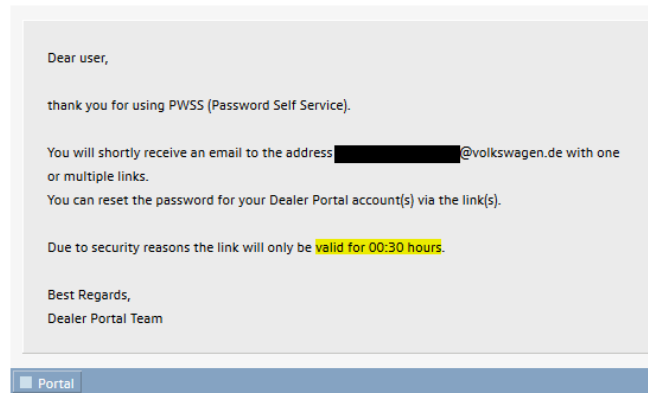
The screenshot shows the 'Password Self Service' form. It contains the following text: 'Please enter the email address, that is associated with your account and was validated. You will get an email with one link (per account) to reset your password.' Below this text is an input field labeled 'Email'. At the bottom of the form are buttons for 'Portal' and 'Submit'.

If the provided mail address is correct a mail will be send to this address. It contains one link per account (Global UserID) that uses the entered mail address. You get a confirmation on the screen with the additional information about the expiration time of the links. If links are already expired you will get an according message after calling them. In this case you have to start the process again.

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## Password Self Service



By calling the Links you will be asked to reset the password of the according Global-UserID. You have to consider the Dealer Portal password policies as usual.

If the PWSS process is finished successfully you can instantly use the new password for login to Dealer Portal.

### Note:

If the mail address of a user has been changed by an admin or in the personal profile by the user himself validation status expires. The PWSS function can only be used again when validation has been repeated for the changed mail address (per account).

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## 9 Glossary

<b>CPN</b>	<b>CentralPartnerNetwork</b> Central network within Volkswagen (Plant systems)
<b>PWSS</b>	<b>Password Self Service</b> A "forgot password" function in Dealer Portal that allows users to reset their passwords on their own without any admin

## 10 History

Version	Datum	Beschreibung	Veranlasst von	Geändert durch
1.0.0.0	03.01.2005	Creation of the document	VHL	AIN
1.0.1.0	07.06.2005	Document checked, expanded and corrected	STI	GFH
1.0.1.1	01.07.2005	Screenshot corrected	STI	MAT
1.0.1.2	25.07.2005	<ul style="list-style-type: none"><li>• Organisation gets the securitycode from the importer</li><li>• Button "back" of the browser should not be used</li><li>• Applications are shown only if available depending on the login</li><li>• Repeatedly wrong password disables user for three minutes</li></ul>	STI	MAT
1.0.2.2	08.09.2008	<ul style="list-style-type: none"><li>• Introduction of the Global-UserID</li><li>• Text updated</li><li>• Screenshots updated</li></ul>	KTL	LSR
1.0.3.0	07.01.2019	<ul style="list-style-type: none"><li>• Updated "Validate an E-Mail Address"</li><li>• New "Using the Password Self Service (PWSS)"</li></ul>	JVY	CTR
1.0.3.1	24.01.2019	<ul style="list-style-type: none"><li>• Removed sections for "Personal notifications"</li><li>• Updated required version for Internet Explorer</li></ul>	JVY	CTR