Stock Portal Partner User Guide

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1. Introduction

The Stock Portal application has been written to replace the old Partner Reports application.

1.1. URL

The new Stock Portal system can be found at the following link:

https://stockportal.carshop.co.uk

1.2. Browser Policy

IE11, Microsoft Edge, Chrome, Safari (not on Windows), Firefox.

Those using Internet Explorer are advised, if possible, to upgrade to the latest version (currently IE11) due to Microsoft no longer supporting old versions as of 12th Jan 2016. For more information see here:

https://www.microsoft.com/en-gb/WindowsForBusiness/End-of-IE-support

For the best experience however, we recommend using Chrome.

2. CarShop Single-Sign-On

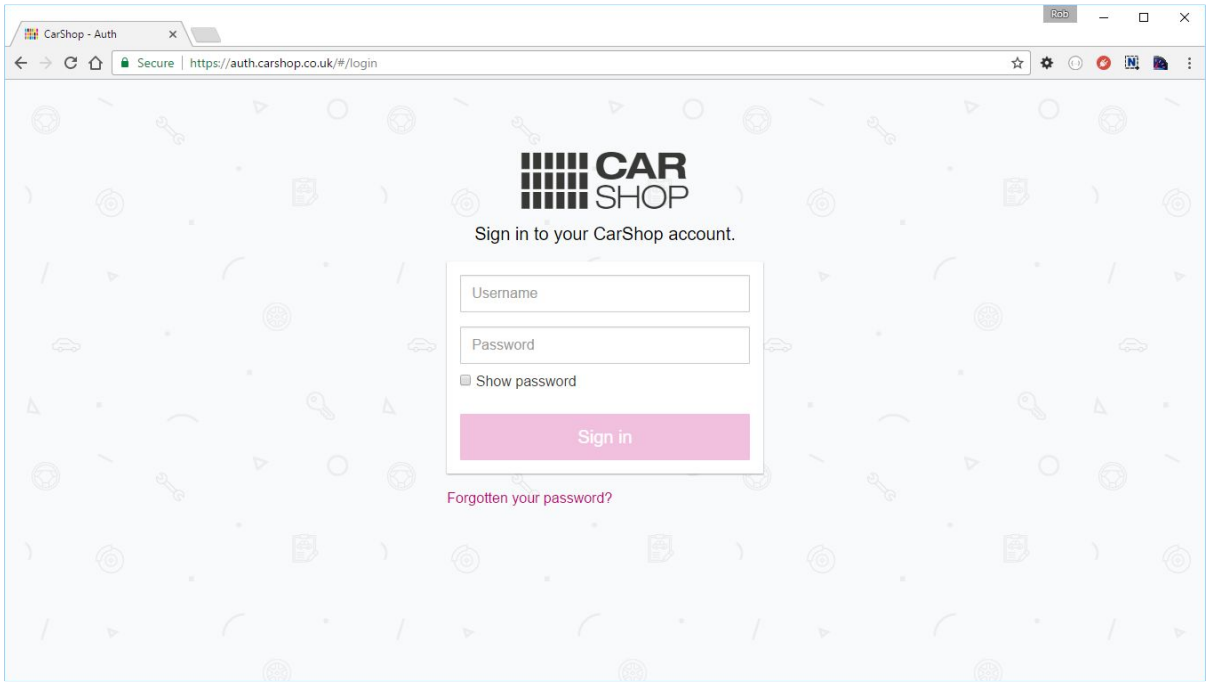
The Stock Portal now uses our in-house single-sign-on called CarShop Auth. This works similar to how a Google account works, once signed in to CarShop Auth, you are automatically signed in to the Stock Portal, and vise versa.

CarShop Auth allows you to now manage your own account and reset your password if forgotten etc.

2.1. URL

CarShop Auth can be found at the following URL:

https://auth.carshop.co.uk



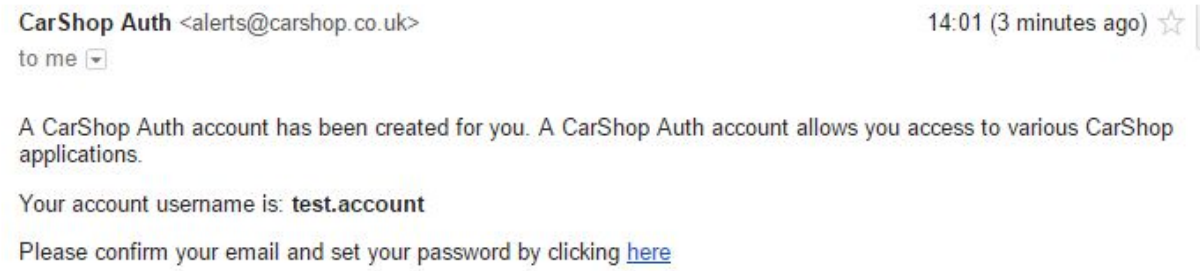
2.2. Request Account

Due to CarShop Auth not being for general public sign-up, if you require an account setting up for you in order to access the Stock Portal please submit a helpdesk ticket by emailing:

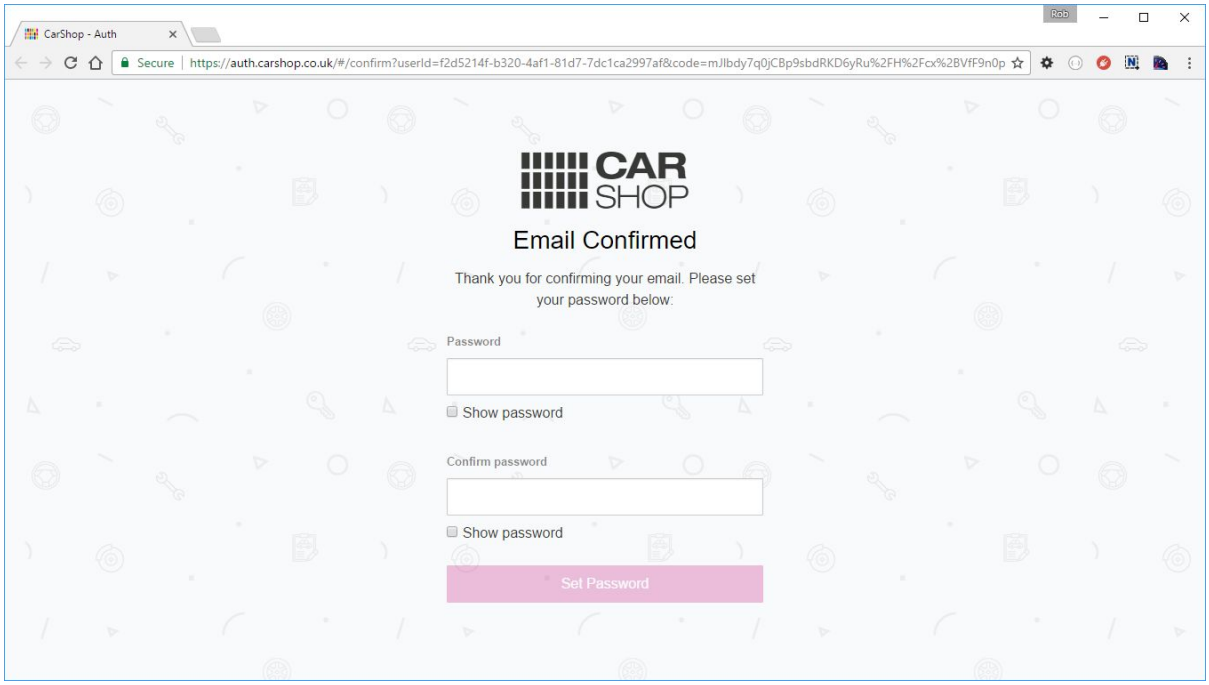
helpdesk@carshop.co.uk

2.3. Confirm Account

Once an account has been created for you, you will receive an email like below asking for you to confirm your email and set your password:



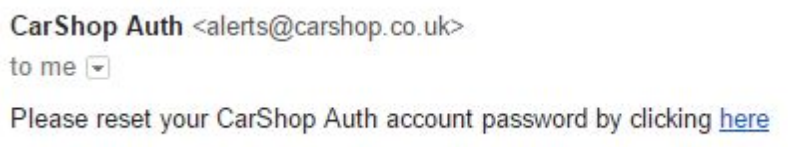
Clicking the link will direct you to CarShop Auth where you will be asked to set your password:



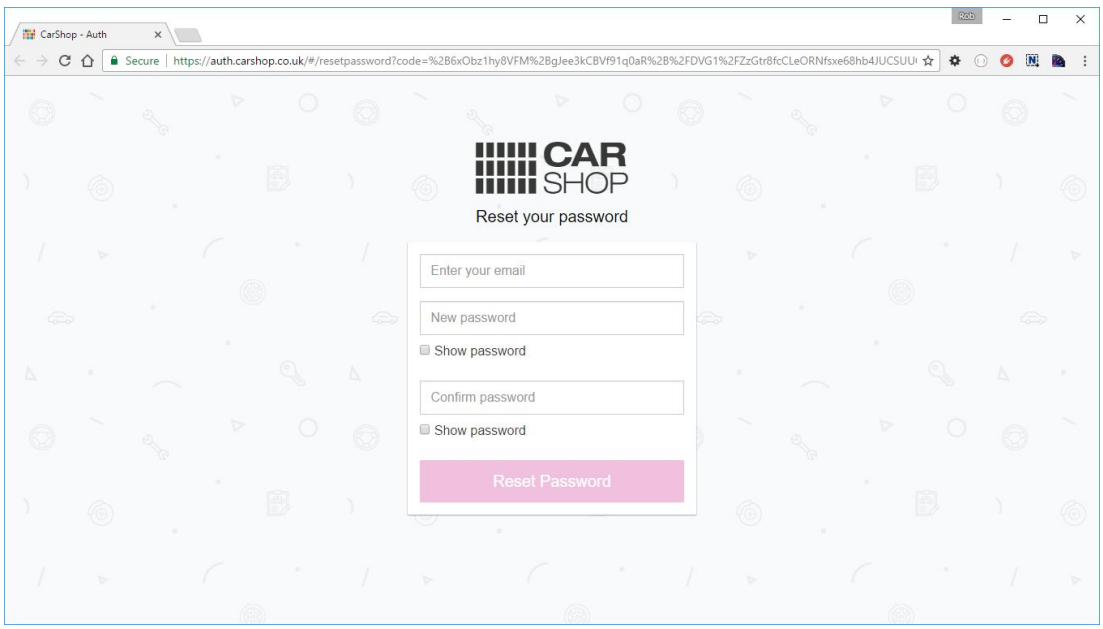
Once you have set your password, you will be redirected back to the login page where you should now be able to sign in to your new account.

2.4. Forgotten/Reset Password

If you have forgotten your password, click the Forgotten Password link on the login page, you will be asked to enter your email. Once you have entered your email and clicked the ‘Reset Password’ button you will receive an email with a link to reset your password:

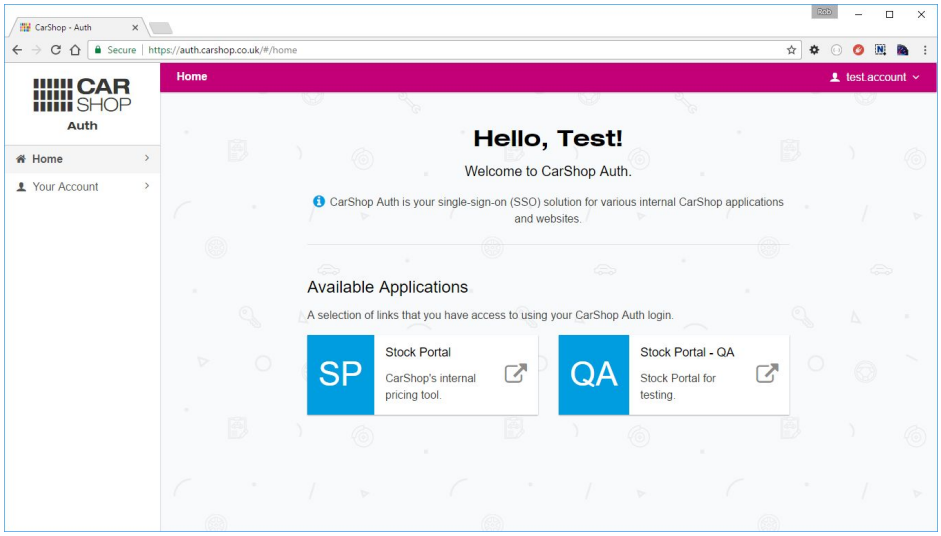


If you follow the link from the email you will be taken to CarShop Auth where you will be presented with a form to reset your password. Simply follow the instructions to reset your password and once successfully reset you should be able to log in.

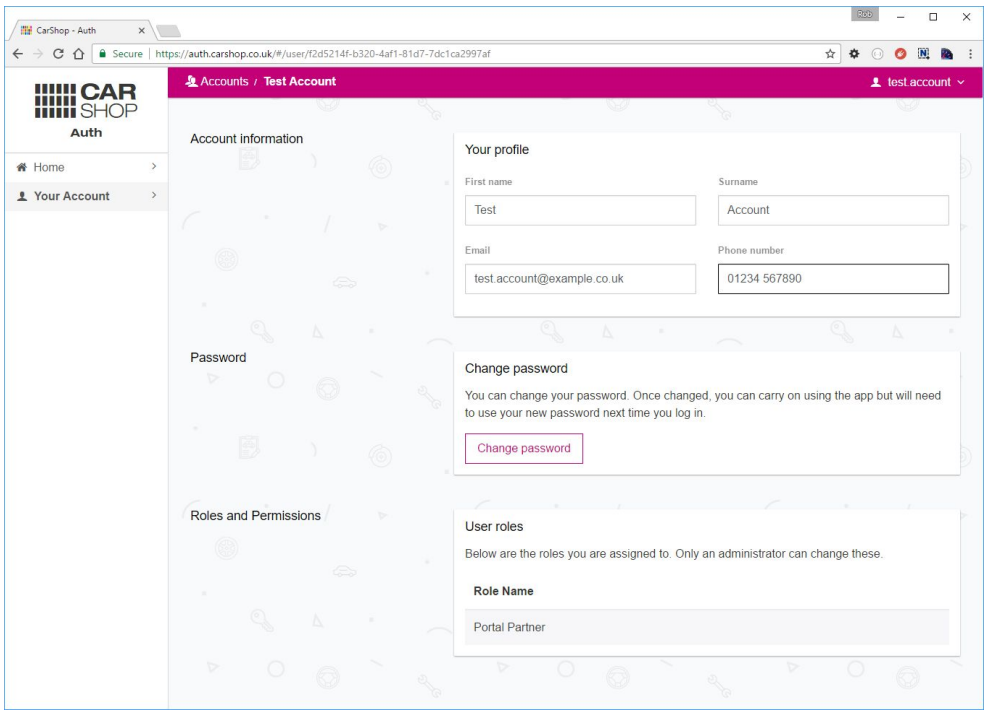


2.5. Manage Your Account

Once logged in to CarShop Auth, you will be presented with a simple home page that contains links to CarShop systems that you have access to:

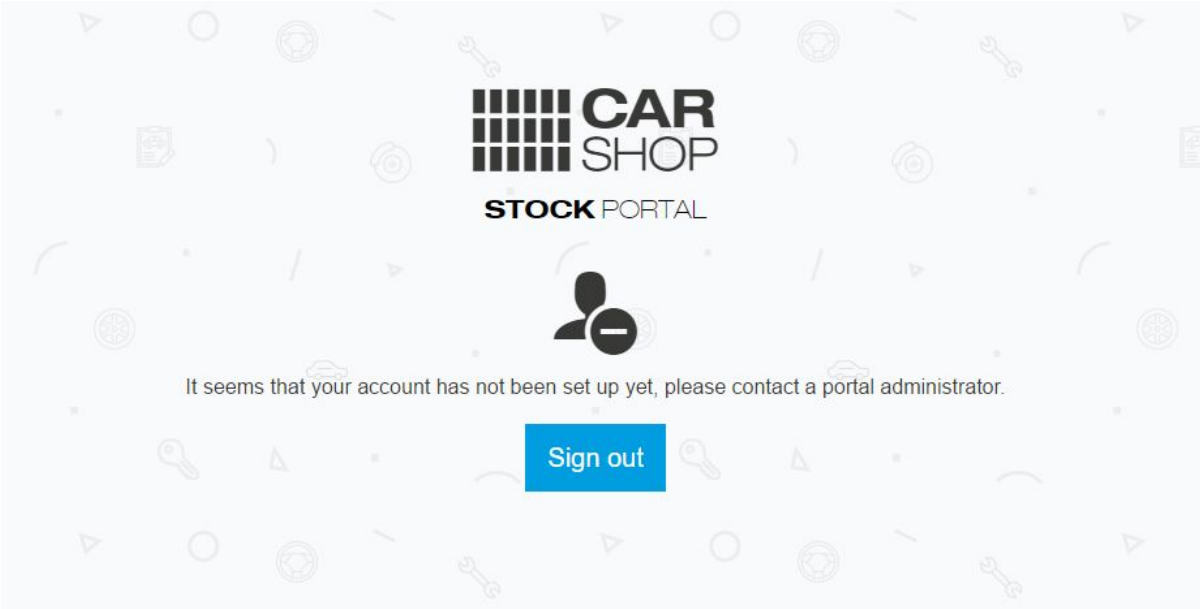


Clicking the ‘Your Account’ link on the sidebar or via your user dropdown in the top right of the screen will take you to your account details where you can update any of your stored information or change your password:

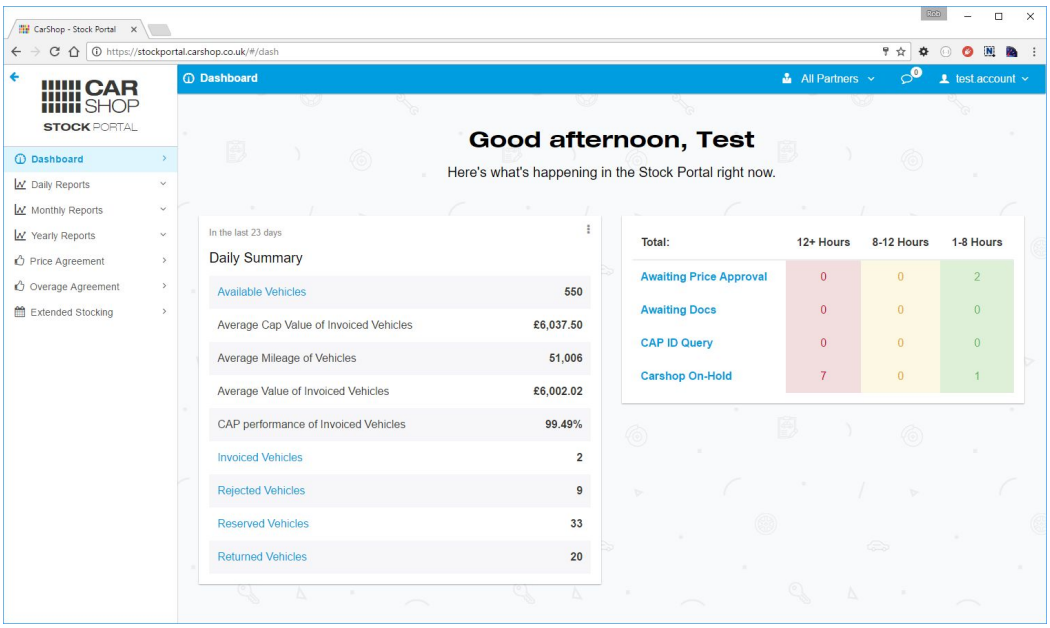


2.6. No Access

If you have signed in to CarShop Auth and then tried to access to the Stock Portal and you are presented with the screen below, this means that whilst you have been setup to use CarShop Auth, a portal Administrator has not yet set you up on the Stock Portal. This is necessary as your account needs to be linked to the correct Source Codes before you can start using the portal. If you get this screen, please contact a portal Administrator or submit a helpdesk ticket.



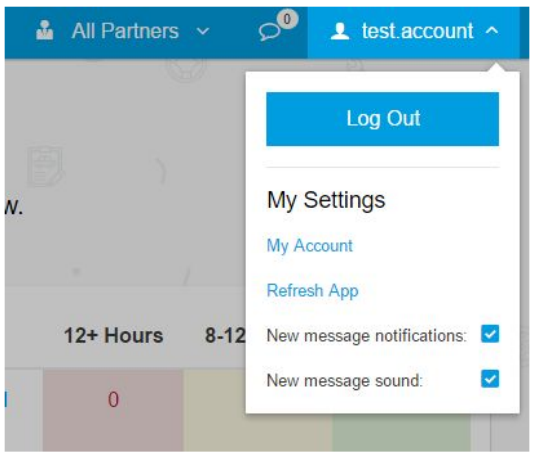
3. Stock Portal Interface



3.1. Userbar

The userbar is the blue bar at the very top of the screen and it contains your Account and Settings dropdown, message alerts and a Source Code filter dropdown.

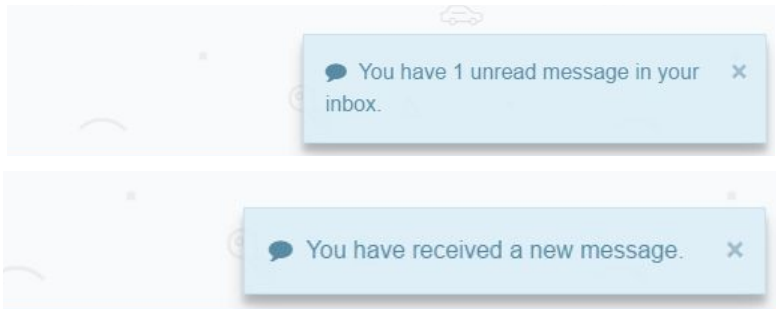
Account and Settings Dropdown



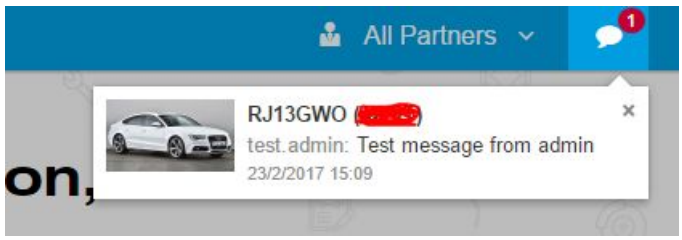
This dropdown allows you to Log Out of the portal (and CarShop Auth). It also let's you change a few built in settings like whether to push message notifications etc. The Refresh App option clears the portal cache and reloads the application.

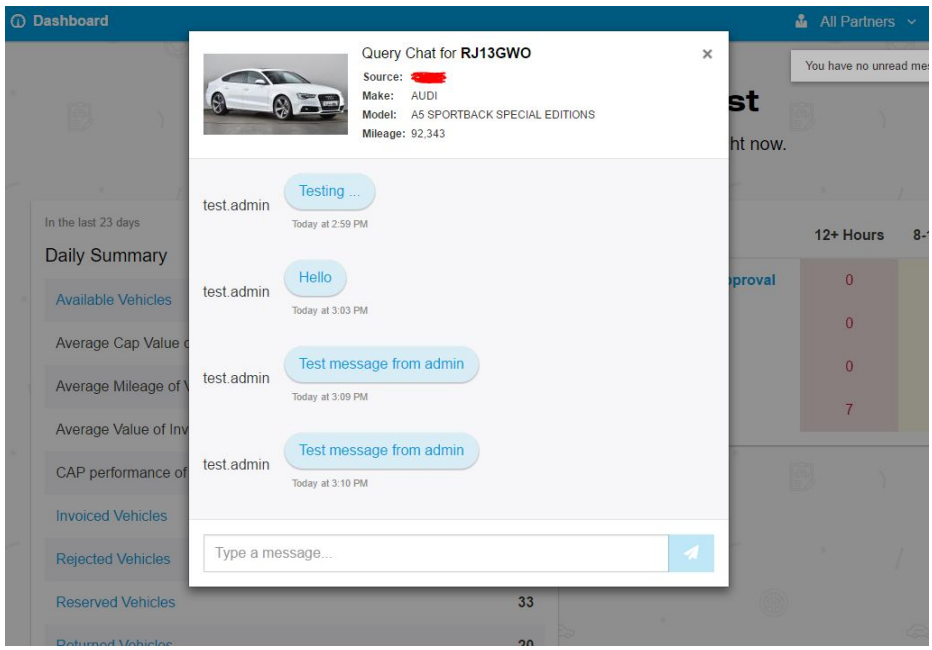
Message Notifications

When you receive a new message you will receive a notification in the bottom-right of the screen and the chat icon within the Userbar will display a number relating to how many unread messages you have received:



Clicking the chat icon in the Userbar will display all unread messages. Clicking the message will open the chat window and mark that message as read, alternatively you can simply click the small ‘x’ on the right of the message to mark as read.





Partner Filter Dropdown

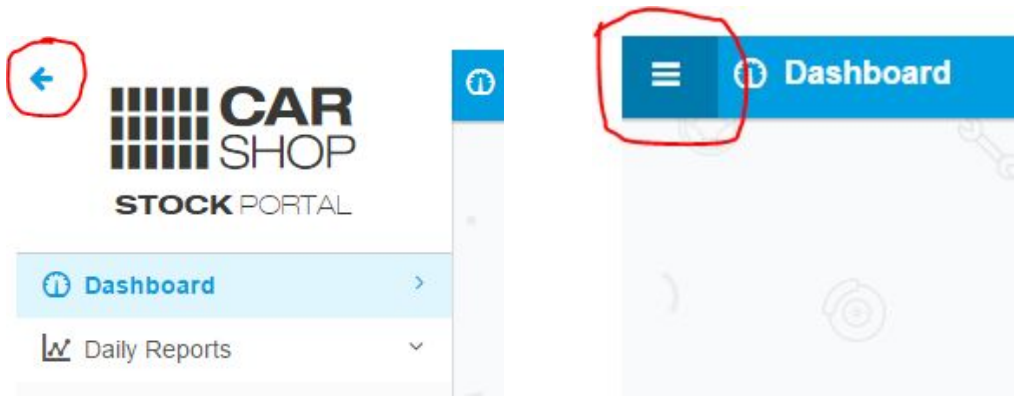
The partner dropdown is a global filter. Source codes selected in this dropdown will appear in any report that is loaded, unselecting a source code will remove that source code from a report.

3.2. Navigation Sidebar

The sidebar is the main navigation for the Stock Portal and contains links to all the reports you have access to.

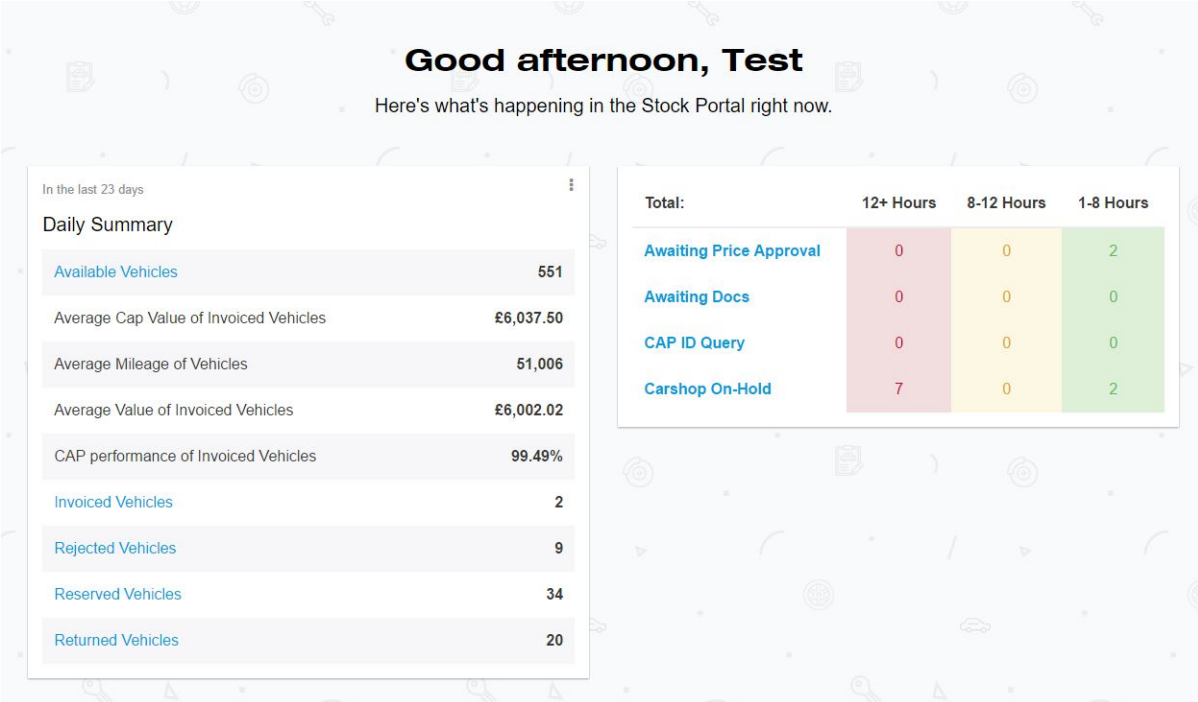
Collapsing the Sidebar

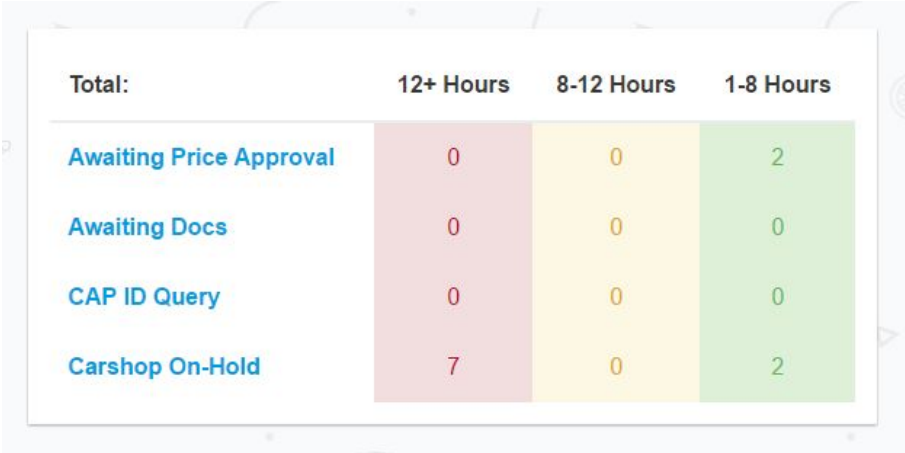
The sidebar can be collapsed/hidden to allow for reports to fill the screen's width. To do this simply click the arrow at the top-left of the screen. To show the menu again simply click the menu icon.



4. The Dashboard

Upon signing in to the Stock Portal the first screen you are presented with is the Dashboard. This page contains your Daily Summary and a table containing counts of certain areas that require action. The dashboard requires no actions itself although there are links to Reports relating to counts.



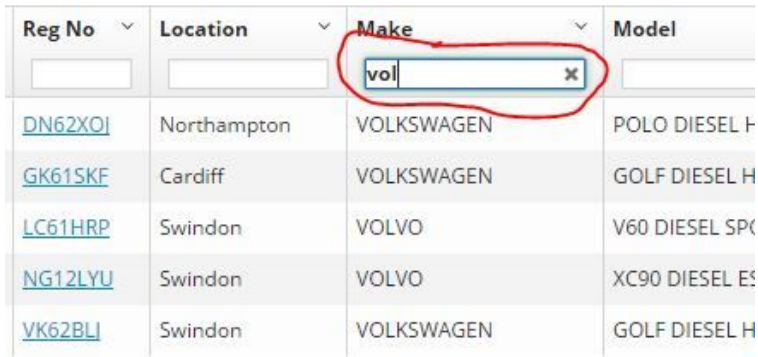


5. Report Grid Functionality

The report grids are the same as on the Partner Reports application and allow a number of useful features.

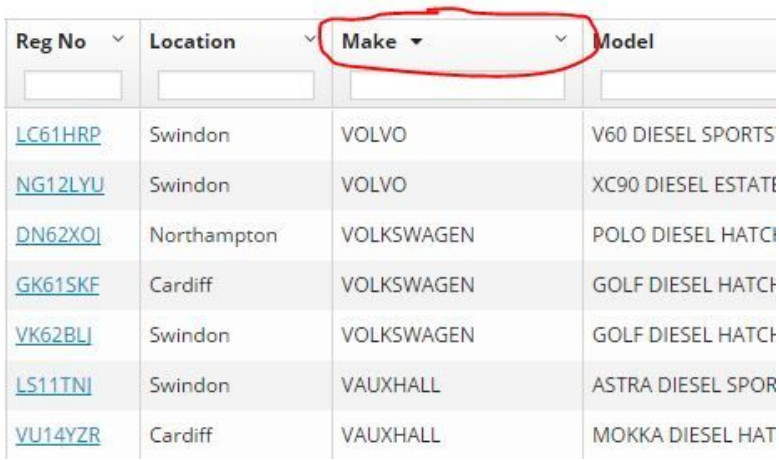
5.1. Filtering

Filtering can be done by entering your filter terms within the text box at the top of each filterable column as shown below, the grid will filter instantly as you type. To clear the filter, simply click the cross on the right hand side of the text box.



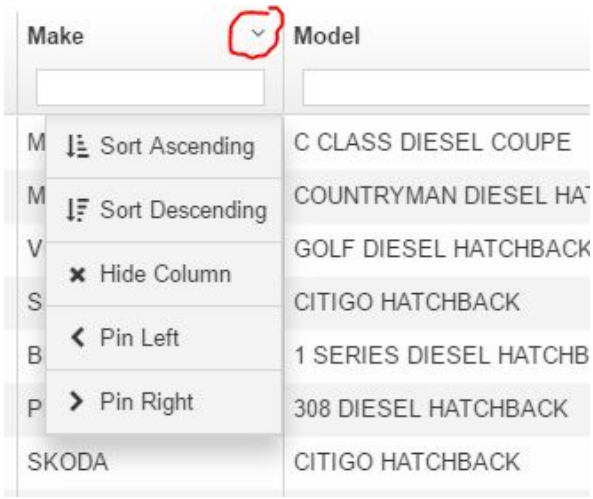
5.2. Sorting

Sorting the grid is done by simply clicking the heading, for example clicking on ‘Make’ will sort the grid by Make, clicking it again will change the sort direction and clicking a third time will sort by default.



5.3. Column Options

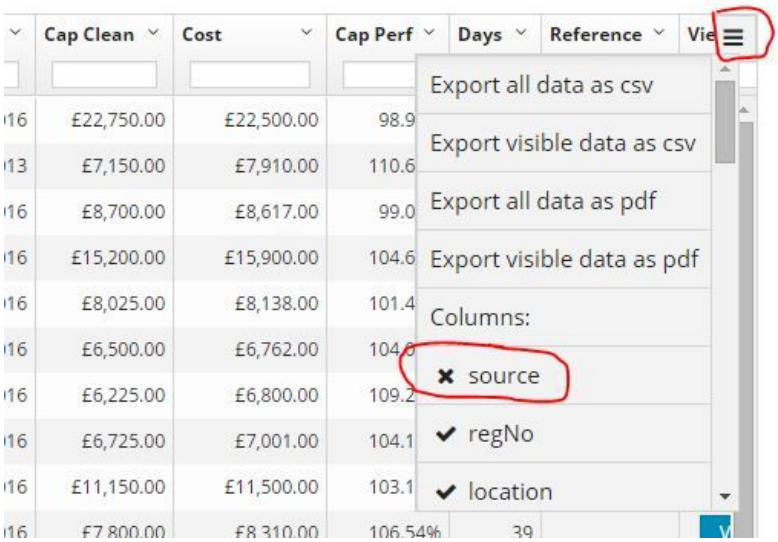
Each column of the grid now has a set of options accessible by clicking on the small arrow in the top right hand corner of the column heading. These can be seen below:



These options allow you to sort the grid by that column, hide the selected column and pin the column to the left or right of the grid to aid with sideways scrolling.

5.3.1. Hide/Show Column

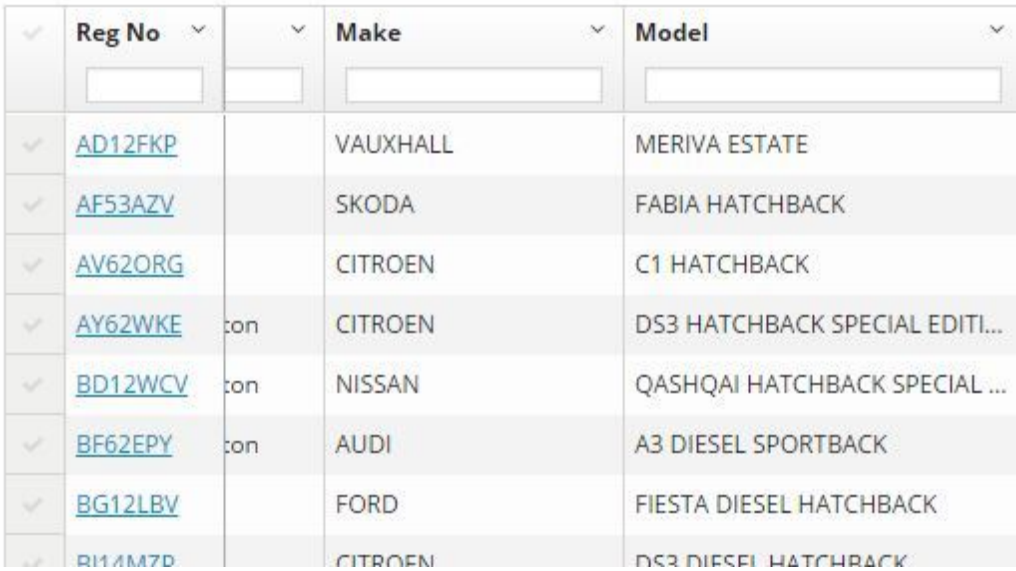
To hide a column bring up the column options as described above and select ‘Hide Column’. This will remove the column from the grid allowing you to focus on only the columns you want/need to see and reducing sideways scroll. To then add the column back to the grid, click the grid menu icon in the top right hand corner of the grid as shown below, find the column you want to show, which will have a cross icon, and click it.



Highlighted: Grid menu icon and option to add a column.

5.3.2. Column Pinning

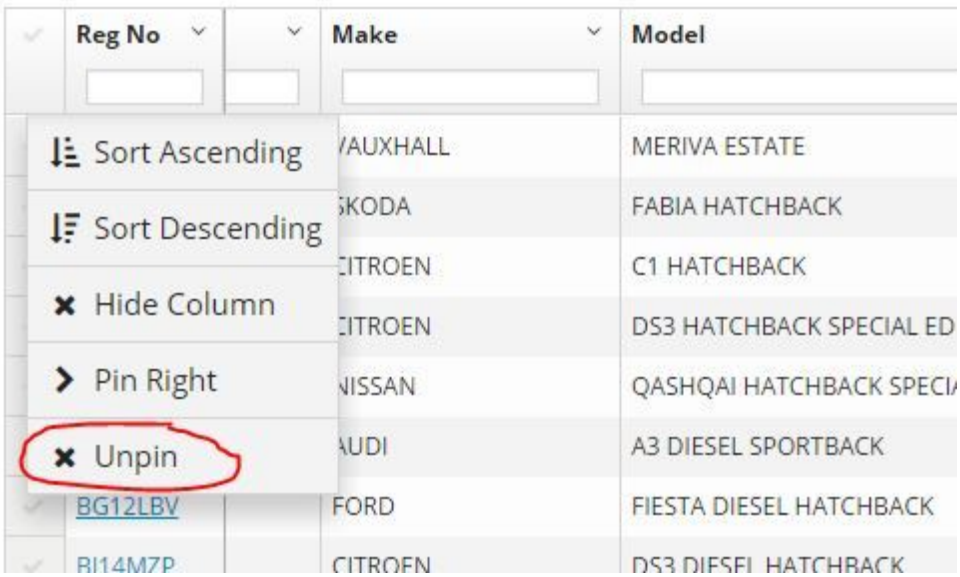
A useful feature of the grid is to pin columns. This is useful when having to scroll sideways but needing to know which car you are looking at. To pin a column, open the column options and select ‘Pin Left’ or ‘Pin Right’, this will then pin the column like below:



Reg No		Make	Model
AD12FKP		VAUXHALL	MERIVA ESTATE
AF53AZV		SKODA	FABIA HATCHBACK
AV62ORG		CITROEN	C1 HATCHBACK
AY62WKE	ton	CITROEN	DS3 HATCHBACK SPECIAL EDITI...
BD12WCV	ton	NISSAN	QASHQAI HATCHBACK SPECIAL ...
BF62EPY	ton	AUDI	A3 DIESEL SPORTBACK
BG12LBV		FORD	FIESTA DIESEL HATCHBACK
BI14MZP		CITROEN	DS3 DIESEL HATCHBACK

An example of the grid with the ‘Reg No’ column pinned to the left.

To then unpin the column, simply open the pinned column’s options and select ‘Unpin’ as shown below:



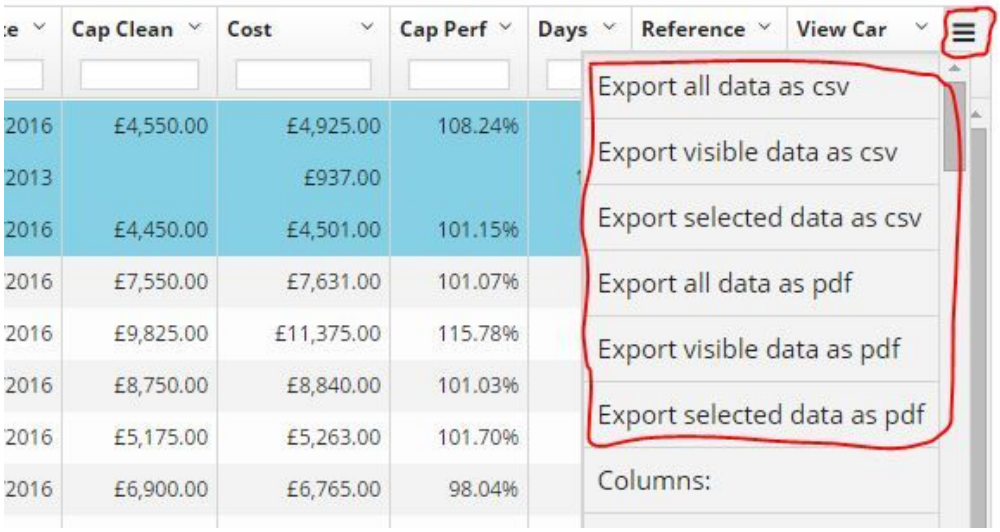
5.3.3. Column Resizing

All columns in the grid can now be resized. To resize a column, click and drag the right hand edge of the column header.

5.4. Exporting Data

Exporting data to either Excel (CSV) or PDF is possible with the grid.

Exporting can be done by clicking the grid menu icon in the top right of the grid and selecting one of the six possible Export options (four if no rows are selected).



Highlighted: Grid menu icon and export options.

5.4.1 Export Options Broken Down

Export all data as csv/pdf

These options will export ALL data for that report as a CSV file (Excel) or PDF.

Export visible data as csv/pdf

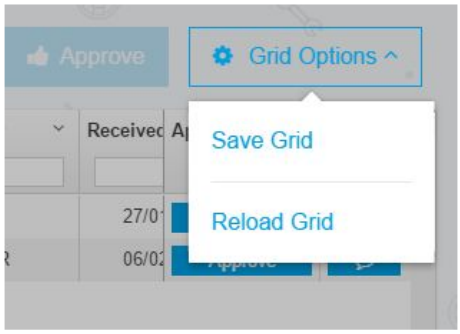
These options will export all the data that is visible on the selected page. This will exclude any data within hidden columns and data on other pages.

Export selected data as csv/pdf

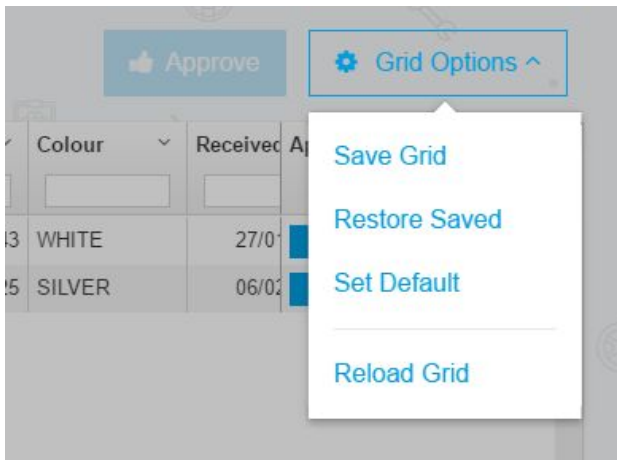
These options will export the data for any selected rows.

5.5. Saving Grid State

A new feature to the Stock Portal is the ability to save your grid's state on certain reports via the 'Grid Options' dropdown at the top-right of a report screen. Clicking 'Save Grid' will save any filtering, sorting, hidden/moved/resized columns to your browser's cache so when you next load that report, it will remain in the same state.



If you have saved the state of your grid and then make further changes, you can either re-save the grid to your new state or by clicking 'Restore Saved' the grid will return to your previous saved state. If you wish to return to the default grid settings then you can select 'Set Default' and this will remove your saved settings.

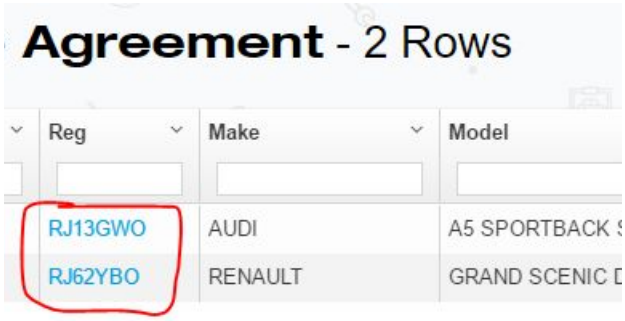


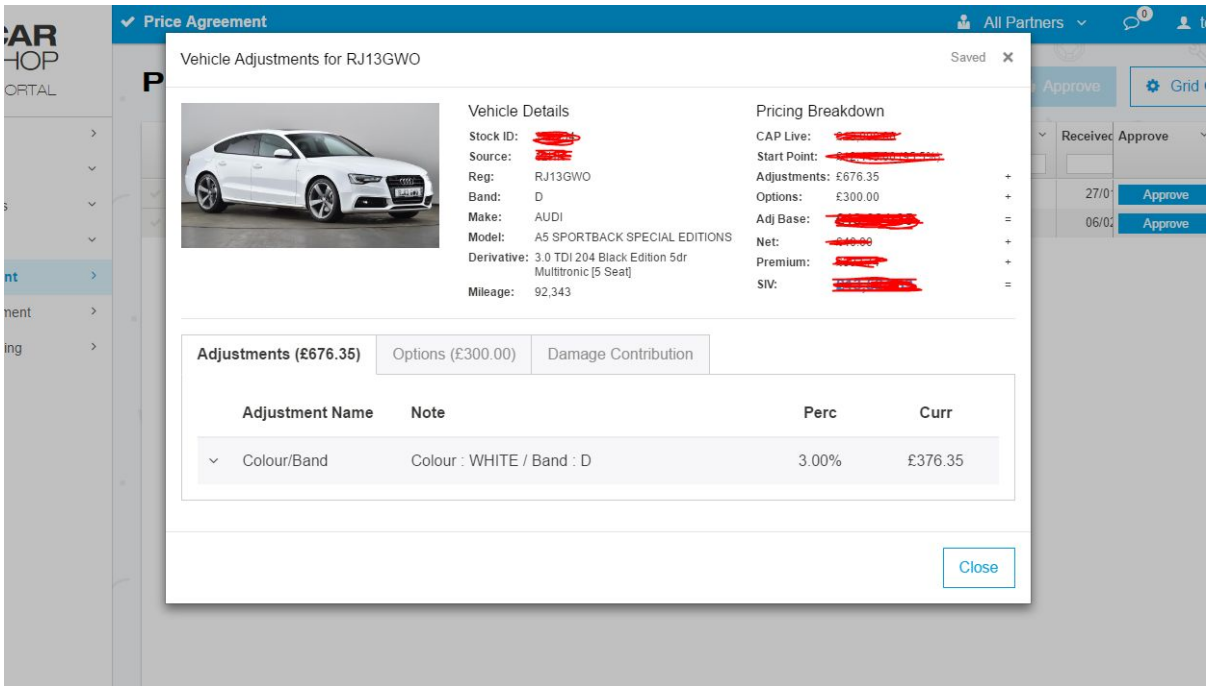
Reload Grid

The 'Grid Options' dropdown also has an option to reload the grid, this will refresh the data within the grid.

5.6. Viewing a Vehicle

The report grid allows you to view more details about each vehicle by clicking any link, usually the vehicle's Registration number. Clicking this link will open a modal dialog containing the vehicle's details, images and pricing breakdown along with tabs to show any Adjustments made to the vehicle's SIV.

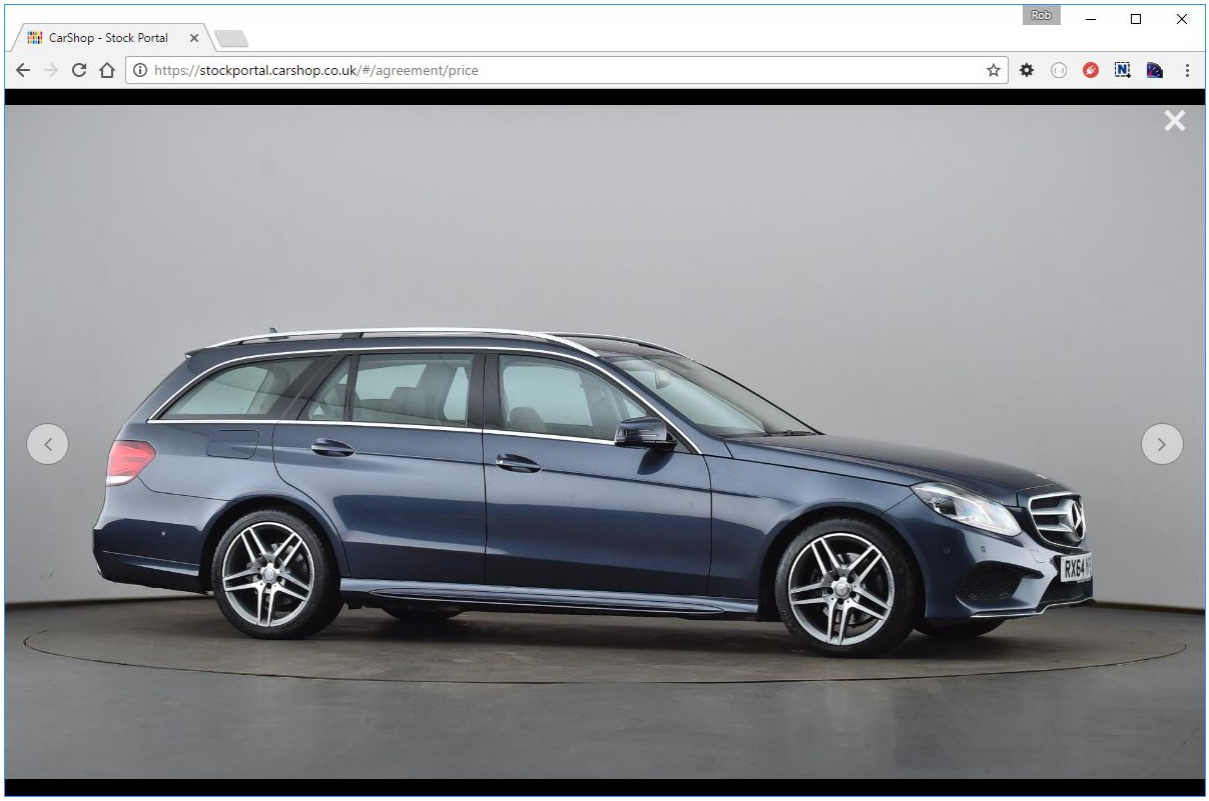




5.6.1 Vehicle Images

For vehicles that have a full image set from CarShop, you can now view all images in a gallery slideshow by clicking on the image thumbnail in the Vehicle Adjustments dialog.

Clicking the arrows on the left or right of the image will scroll through the images. To close the gallery, click the ‘X’ in the top-right of the screen.



5.6.2 Vehicle Adjustments

The Vehicle Adjustments have been re-worked for the Stock Portal to allow for high-level adjustments based on certain criteria that a vehicle meets. This new system allows you to see exactly what and more importantly *why* adjustments were made to the vehicle's price.

Each adjustments is listed in a table on the Adjustments tab and contain a Name, a Note and the Percentage/Currency of the adjustment. You can open up each Adjustment via the down arrow in the first column and this will show all the criteria for that Adjustment.

Example

The example below shows that this vehicle has a -1% decrease due to it's Colour and Band combination, but then has a 2% increase due to it's Age and Mileage combination, resulting in a total increase of 1% or £178.52 in this case. *(NB: this is only test data)*

Adjustments (£178.52)	Options	Damage Contribution

	Adjustment Name	Note	Perc	Curr
⌄	Colour/Band	Colour : BLUE / Band : E	-1.00%	-£178.53
⌄	Age/Mileage	24-29 months / 55001-60000 miles	2.00%	£357.05

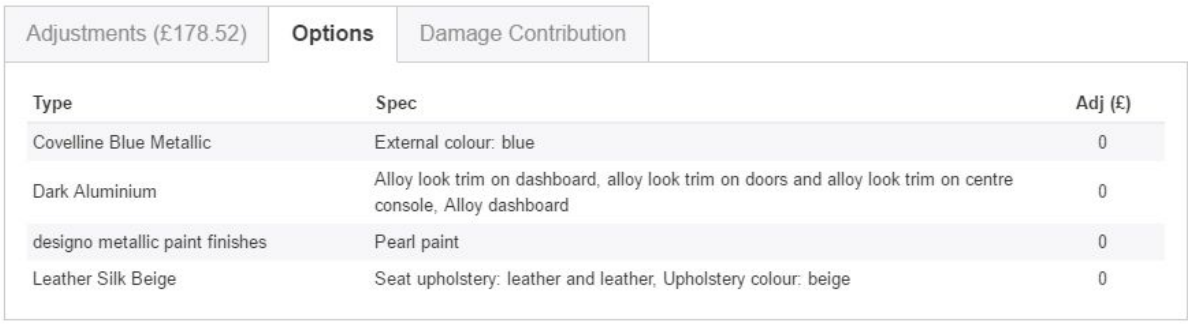
Adjustments (£178.52)	Options	Damage Contribution

	Adjustment Name	Note	Perc	Curr
⌄	Colour/Band	Colour : BLUE / Band : E	-1.00%	-£178.53
⌃	Age/Mileage	24-29 months / 55001-60000 miles	2.00%	£357.05

Adjustment Type	Operand	Value
Mileage	<=	60000
Mileage	>=	55001
Age	<=	29
Age	>=	24

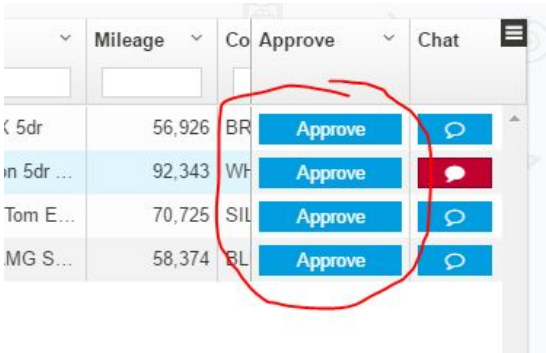
5.6.3. Option Adjustments

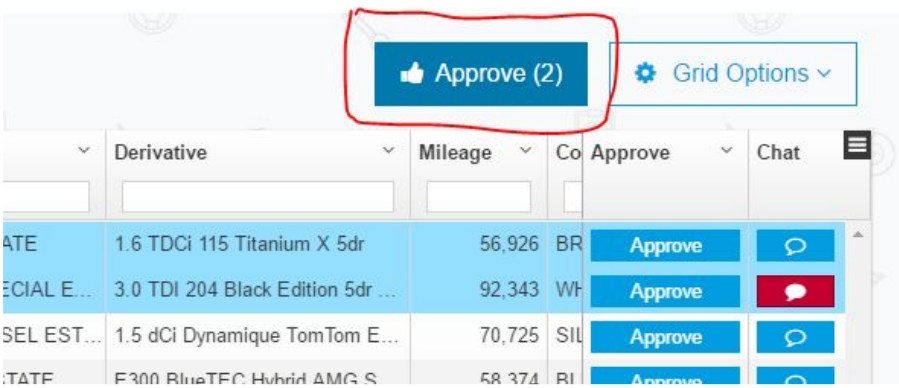
Along with the above Adjustments, a vehicle's price can also be adjusted by individual Options that the vehicle has. These can be seen on the Options tab on the Vehicle Adjustments dialog.



5.7. Price Agreement Actions

On the Price Agreement report, you are able to Approve vehicle prices, either singularly via the 'Approve' button pinned to the right of each row, or in bulk by selecting each row and clicking the 'Approve' button at the top-right of the report above the main grid.

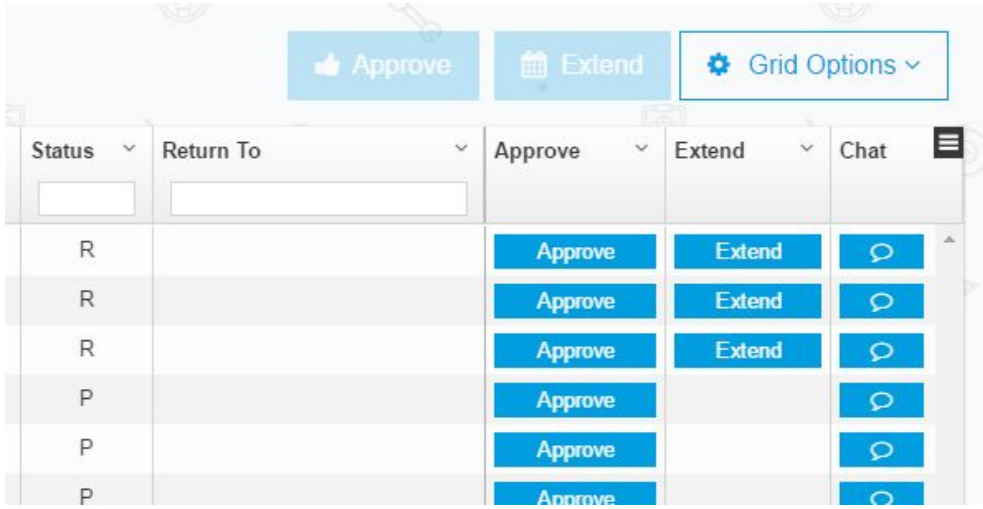




5.8. Overage Agreement Actions

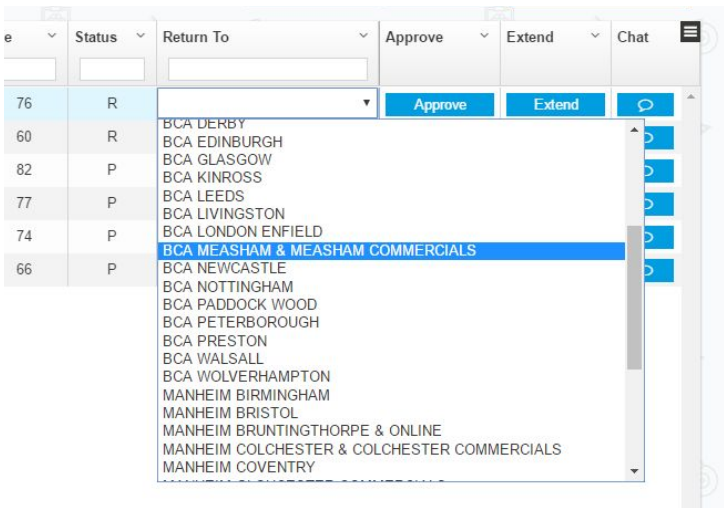
The Overage Agreement report has the same functionality as the Price Agreement report with the ability to Approve vehicle's singularly or in bulk.

Vehicles that have been marked for Return have a status of 'R' and those that are marked for Purchase have a status of 'P'



5.8.1 Setting a Return Location

Vehicle's that are to be returned have the option to set a Return Location. To set a Return Location, simply double-click in the corresponding 'Return To' cell, a dropdown will appear allowing you to select the Return Location, once selected, either hit Enter or just click away from the dropdown to save that location. You can then Approve the vehicle.



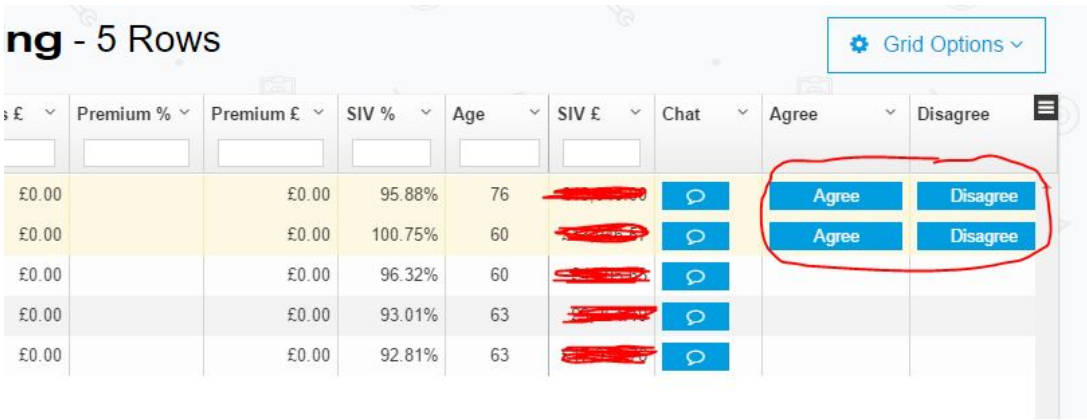
5.8.2 Extend *(if applicable)*

For certain users, there is the ability to Extend a vehicle. This is for vehicle's that are Overage and have been marked for Return but can remain with CarShop until sold. In this case, instead of Approving a vehicle, you can simply select Extend, again either singularly or in bulk.

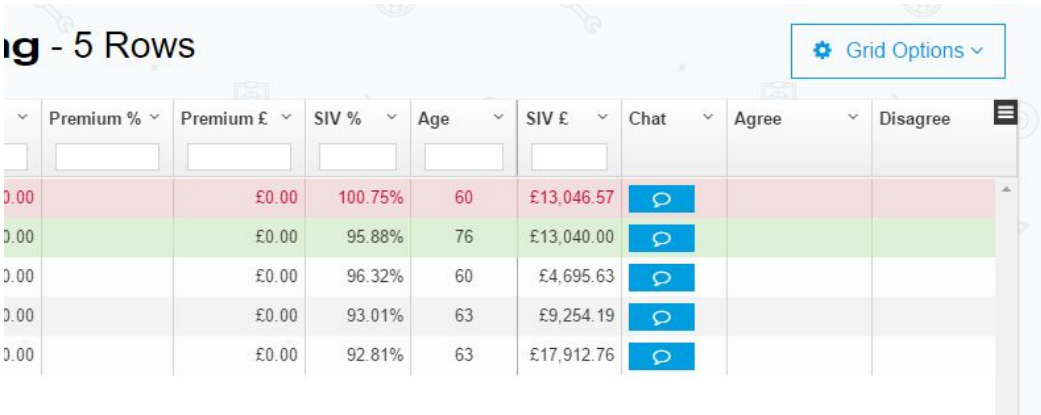
5.9. Extended Stocking *(if applicable)*

Vehicles that have been selected to be extended from the Overage Agreement report appear in this report and will remain here until sold.

Whilst a vehicle is within Extended Stocking, the SIV can be re-adjusted by CarShop and submitted for approval. Once an SIV has been adjusted and submitted, you will have the ability to Agree or Disagree the new SIV using the buttons provided:

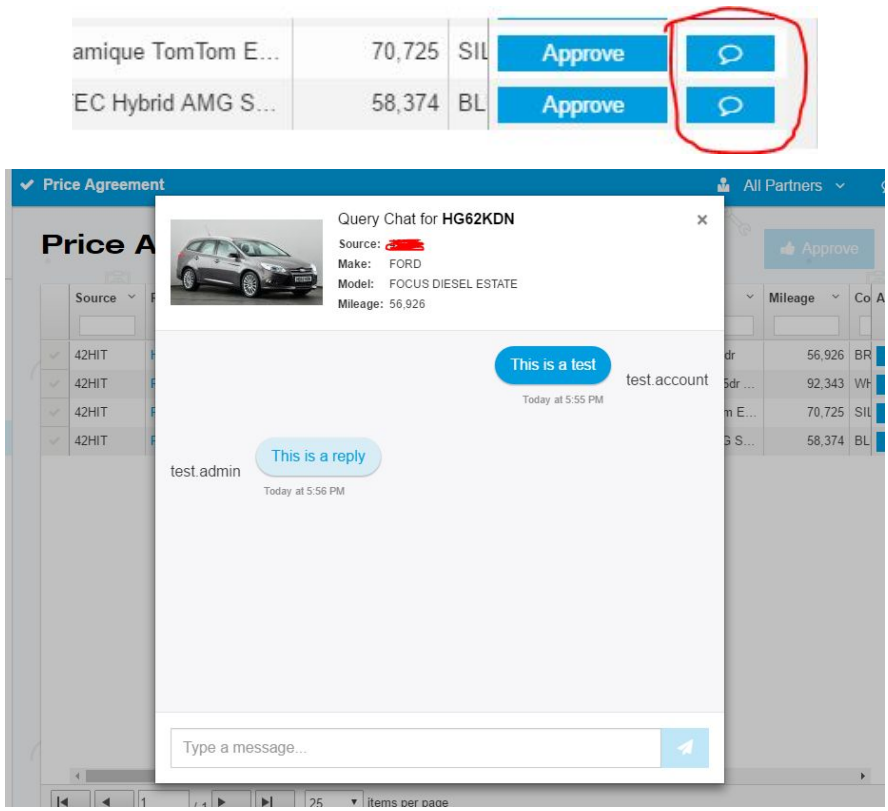


Once a price is agreed, the row will turn green, or if a price is disagreed, the row will turn red:



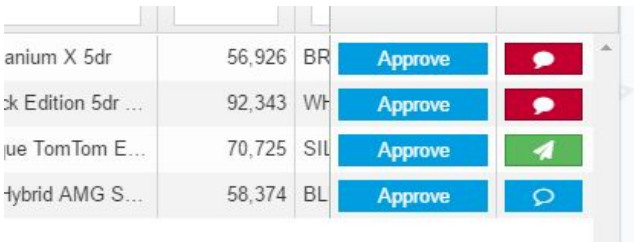
5.10. Chat

On certain reports you are able to Chat about a vehicle. To begin a conversation about a vehicle, click the chat icon button on the far-right of a report grid which will open the chat window to start your conversation. *Note: Messaging is now real-time so new messages will be pushed to the window as they arrive.*



5.10.1 Chat Icon Status

The chat icon will reflect the status of a conversation. If no conversation exists for that vehicle, it will remain BLUE. If you have received a message or have not replied to a message, it will be RED and if you have sent/replied to a message it will be GREEN with a message sent icon.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