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Reseller Portal User Manual

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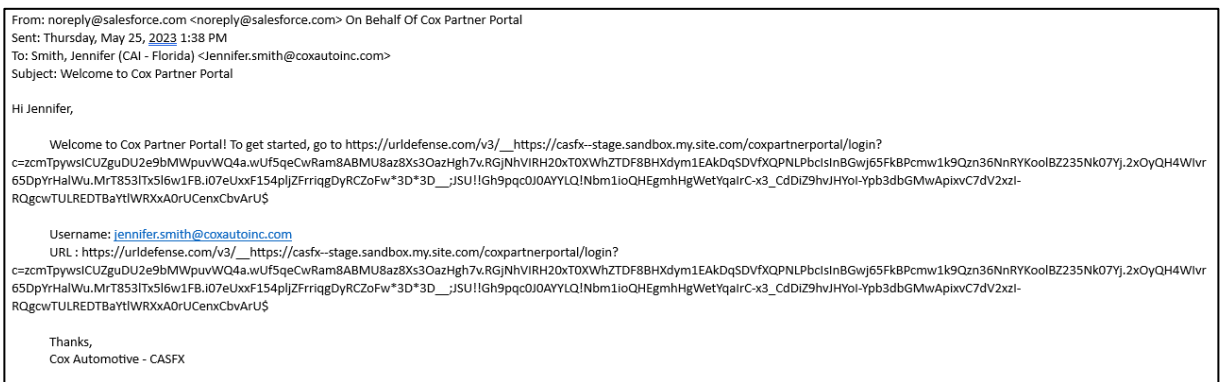
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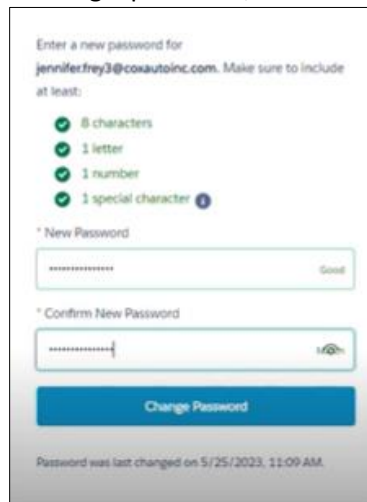
Initial Login

The Cox Partner Portal is used by contractor partners to submit sales orders on behalf of clients. To log into the Cox Partner Portal for the first time, follow these steps:

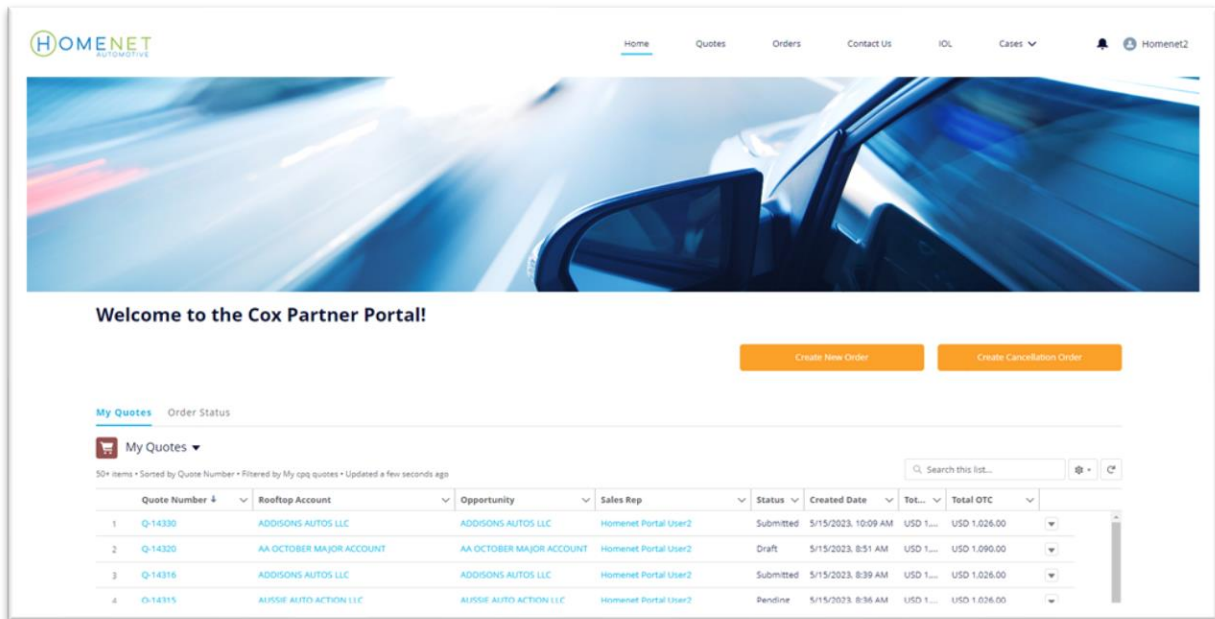
- Click on the unique link from the Cox Partner Portal welcome email. This email will come from noreply@salesforce.com on behalf of Cox Partner Portal and will include the subject line "WELCOME TO COX PARTNER PORTAL." This link is valid for (7) days from the day it is received.



- The first time logging in will require setting up the account and creating a password. After creating a password, click **Change Password**.



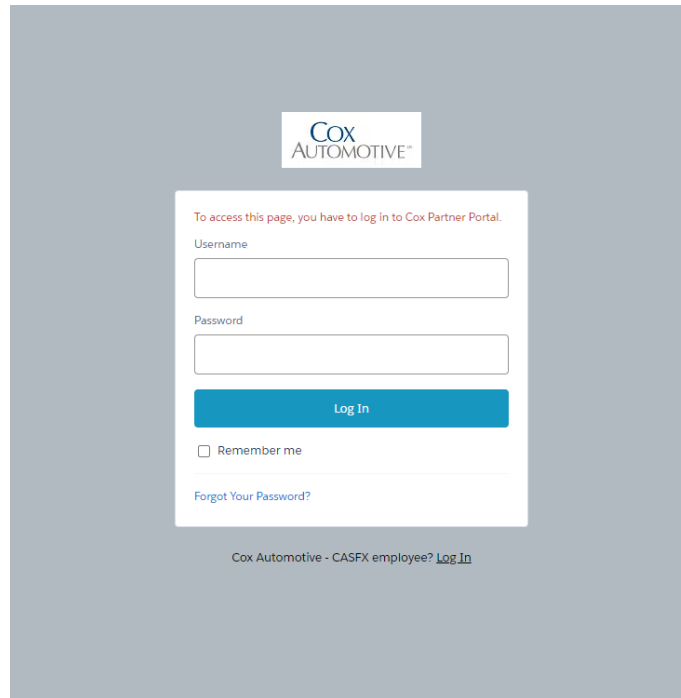
- Access the Portal Homepage.



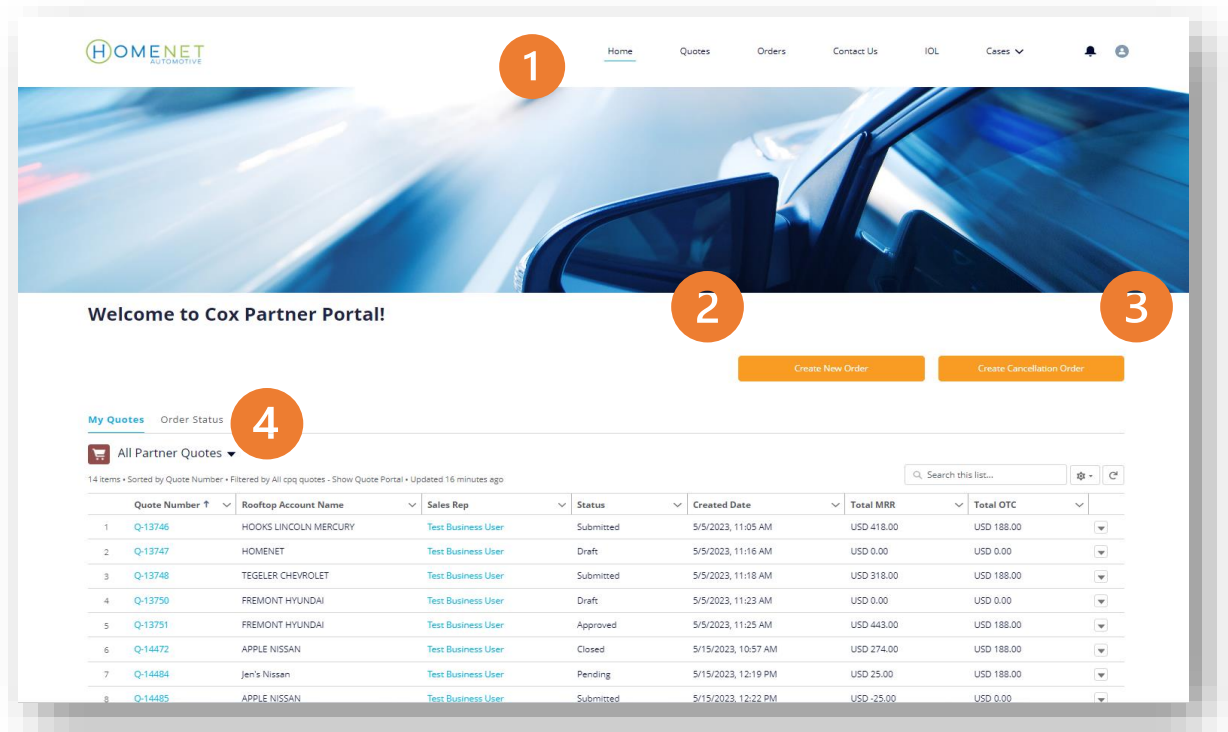
- For help with receiving a new welcome email, resetting passwords, or setting up a new user, email hmn.resellers@coxautoinc.com and a reseller platform manager will assist you.

Login

- Go to: <https://casfx.my.site.com/coxpartnerportal/s/>
- Enter your username (found in your initial welcome email) and the password you created upon our initial login.



- Access the Portal Homepage. Key features include:
 1. Top Navigation Bar
 - i. Home – reflects the Welcome to Cox Partner Portal homepage.
 - ii. Quotes – an order that has been drafted and not yet submitted, or an order that has been submitted but not yet activated or completed by the Cox Automotive team.
 - iii. Orders – once a quote is activated or completed by the Cox Automotive team, it becomes an order.
 - iv. Contact Us – redirects to the Contact Form to get in touch with Cox Automotive for additional support or information.
 - v. IOL – redirects to the HomeNet IOL site.
 - vi. Cases – submit a support ticket or look up an existing support ticket.
 - vii. Notifications – status updates, comments, etc. Notification preferences can be adjusted by clicking on the User Icon.
 2. Create New Order button
 3. Create Cancellation Order button
 4. My Quotes – list view of recently viewed quotes. List Views can be adjusted to see different categories.



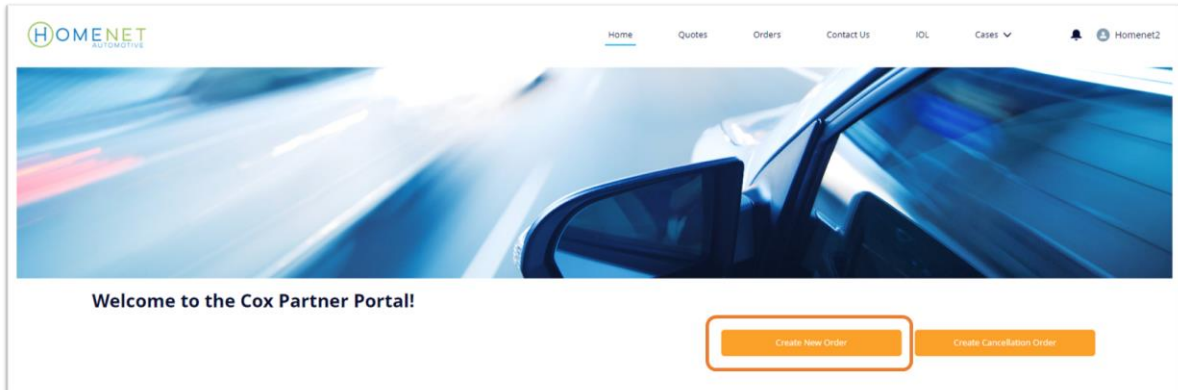
The screenshot shows the HOMENET AUTOMOTIVE Partner Portal interface. At the top, there is a navigation bar with the logo (1) and menu items: Home, Quotes, Orders, Contact Us, IOL, Cases, and a notification icon. Below the navigation bar is a large blue banner image of a car. Underneath the banner, it says "Welcome to Cox Partner Portal!" (2) and has two orange buttons: "Create New Order" (3) and "Create Cancellation Order". Below this is a section for "My Quotes" (4) with a sub-section for "All Partner Quotes". A table lists 14 items with columns for Quote Number, Rooftop Account Name, Sales Rep, Status, Created Date, Total MRR, and Total OTC.

Quote Number	Rooftop Account Name	Sales Rep	Status	Created Date	Total MRR	Total OTC
1 Q-13746	HOOKS LINCOLN MERCURY	Test Business User	Submitted	5/5/2023, 11:05 AM	USD 418.00	USD 188.00
2 Q-13747	HOMENET	Test Business User	Draft	5/5/2023, 11:16 AM	USD 0.00	USD 0.00
3 Q-13748	TEGELER CHEVROLET	Test Business User	Submitted	5/5/2023, 11:18 AM	USD 318.00	USD 188.00
4 Q-13750	FREMONT HYUNDAI	Test Business User	Draft	5/5/2023, 11:23 AM	USD 0.00	USD 0.00
5 Q-13751	FREMONT HYUNDAI	Test Business User	Approved	5/5/2023, 11:25 AM	USD 443.00	USD 188.00
6 Q-14472	APPLE NISSAN	Test Business User	Closed	5/15/2023, 10:57 AM	USD 274.00	USD 188.00
7 Q-14484	Jen's Nissan	Test Business User	Pending	5/15/2023, 12:19 PM	USD 25.00	USD 188.00
8 Q-14485	APPLE NISSAN	Test Business User	Submitted	5/15/2023, 12:22 PM	USD -25.00	USD 0.00

Placing Orders on Existing Accounts

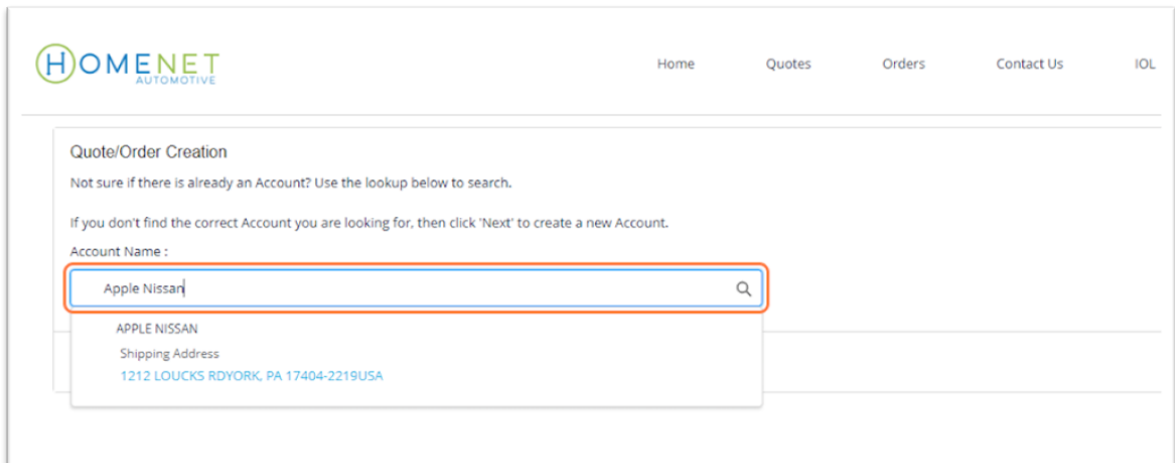
An order must be created anytime you need to add a product. Follow these steps to place an order for an account that already exists in the system:

- Click on **Create New Order**

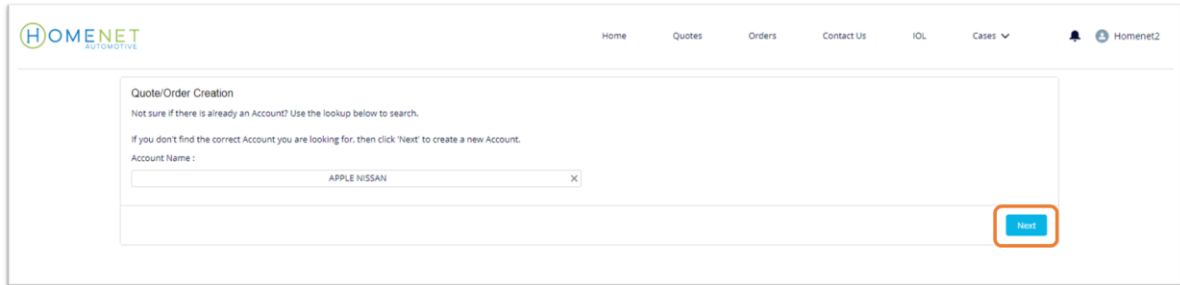


Selecting an existing account

- Search for the account name. Confirm it is the correct account by the shipping address associated with it.

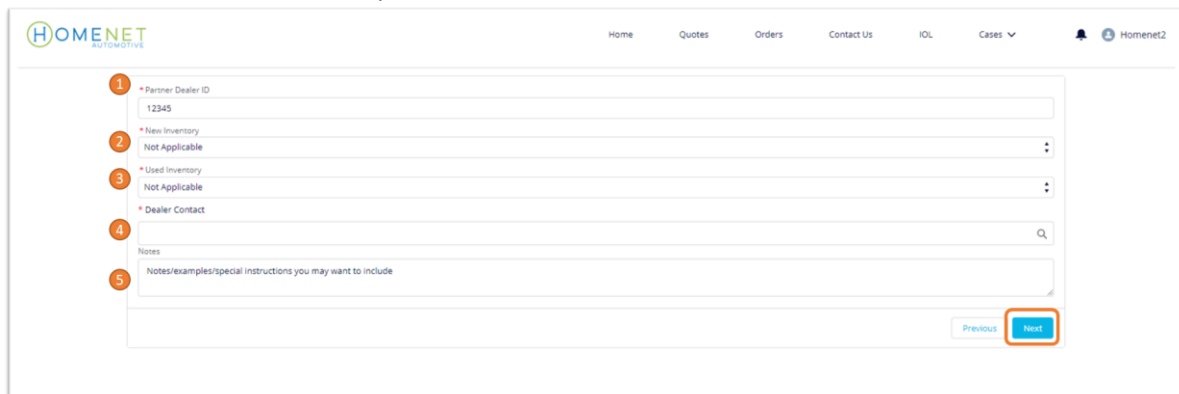


- Click on **Next**



Entering Order Information – Existing Dealer

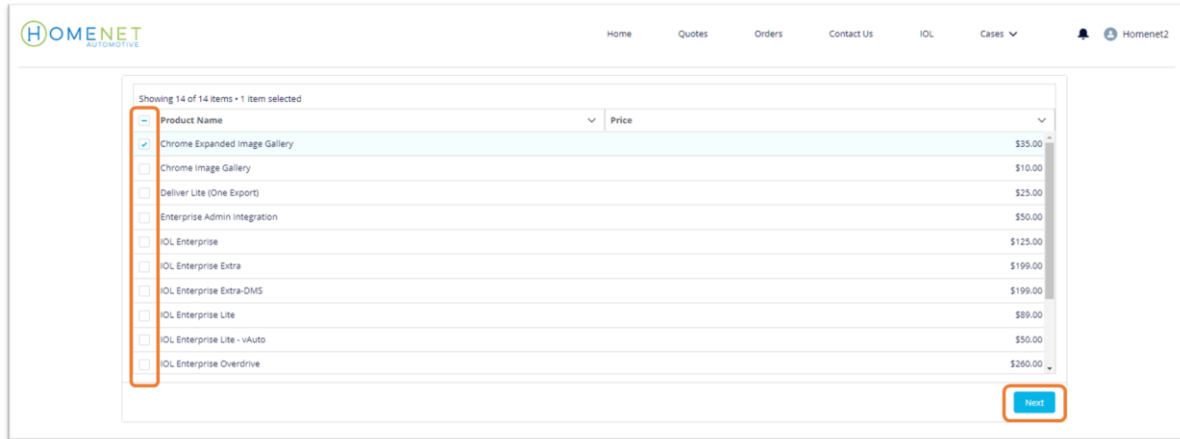
- Enter information for all required fields:



1. Partner Dealer ID
2. New Inventory – make your selection
3. Used Inventory – make your selection
4. Dealer Contact – select an existing contact
5. Notes – add any special instructions to include in the order
6. Click **Next**

Select Products

- Check the boxes for the applicable products for the order. Only products that are approved and assigned to the reseller account will populate.

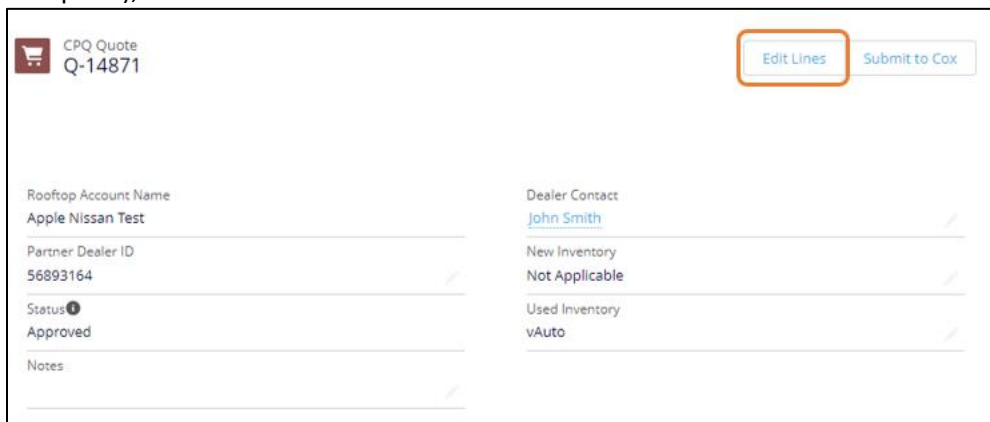


- Click **Next**.

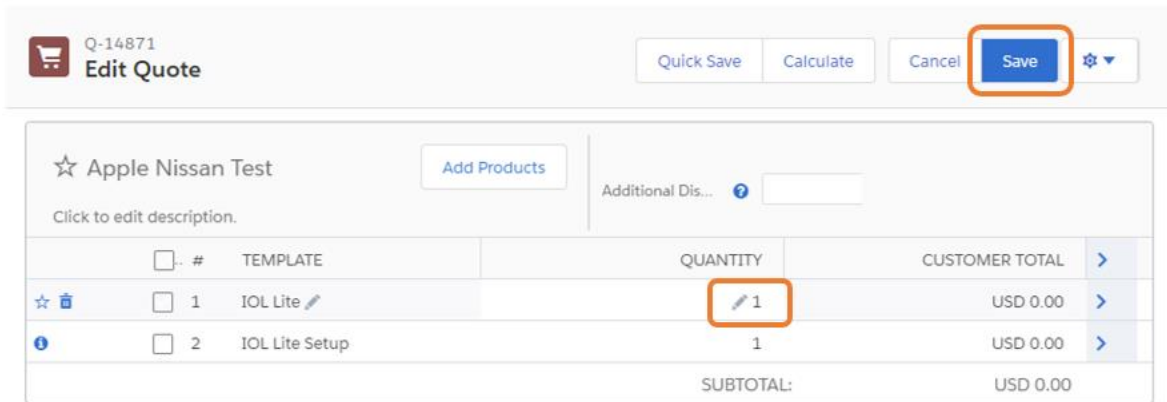
Review Quote

Before the order has been submitted, it is referred to as a “Quote” in the Partner Portal. Review all of the information on the Quote Details page for accuracy.

- To edit any quote line items (e.g., to add, remove, or make edits to products currently on the quote), click **Edit Lines**.



- To change the quantity of products, hover over the product to view the pencil icon and make any changes. Click **Save**.



Q-14871
Edit Quote

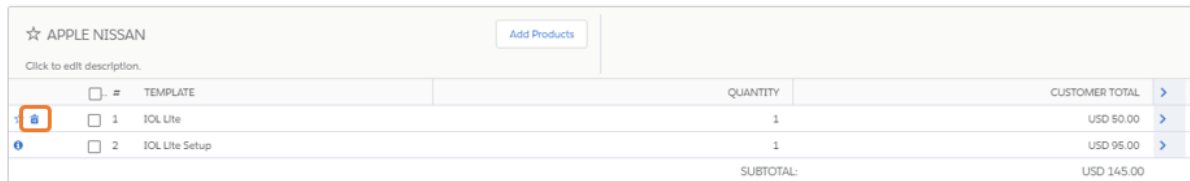
Quick Save Calculate Cancel **Save**

☆ Apple Nissan Test [Add Products](#) Additional Dis...

Click to edit description.

<input type="checkbox"/>	#	TEMPLATE	QUANTITY	CUSTOMER TOTAL	>
☆ <input type="checkbox"/>	1	IOL Lite	1	USD 0.00	>
<input type="checkbox"/>	2	IOL Lite Setup	1	USD 0.00	>
SUBTOTAL:				USD 0.00	

- To remove quote line items, **click the trash can icon** on the left.

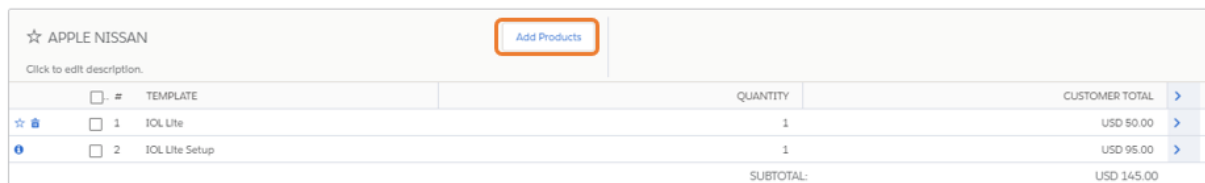


☆ APPLE NISSAN [Add Products](#)

Click to edit description.

<input type="checkbox"/>	#	TEMPLATE	QUANTITY	CUSTOMER TOTAL	>
<input type="checkbox"/>	1	IOL Lite	1	USD 50.00	>
<input type="checkbox"/>	2	IOL Lite Setup	1	USD 95.00	>
SUBTOTAL:				USD 145.00	

- To add quote line items, **click Add Products**. On the next screen, make additional selections by checking the box next to the products you want to add. **Click Save**.



☆ APPLE NISSAN [Add Products](#)

Click to edit description.

<input type="checkbox"/>	#	TEMPLATE	QUANTITY	CUSTOMER TOTAL	>
☆ <input type="checkbox"/>	1	IOL Lite	1	USD 50.00	>
<input type="checkbox"/>	2	IOL Lite Setup	1	USD 95.00	>
SUBTOTAL:				USD 145.00	

- To edit other information on the draft quote such as the Partner Dealer ID, add notes, change the contact name, etc. click the pencil icon next to the field you wish to edit. Make your changes and **click Save**.

Partner Dealer ID
56893164 

Rooftop Account Name
Apple Nissan Test

Dealer Contact
John Smith

Partner Dealer ID
50000000

New Inventory
Not Applicable

Used Inventory
vAuto


Status
Approved

Notes

System Information
Created By
Test Business User, 5/19/2023, 10:31 AM
Last Modified By
Test Business User, 5/19/2023, 10:41 AM

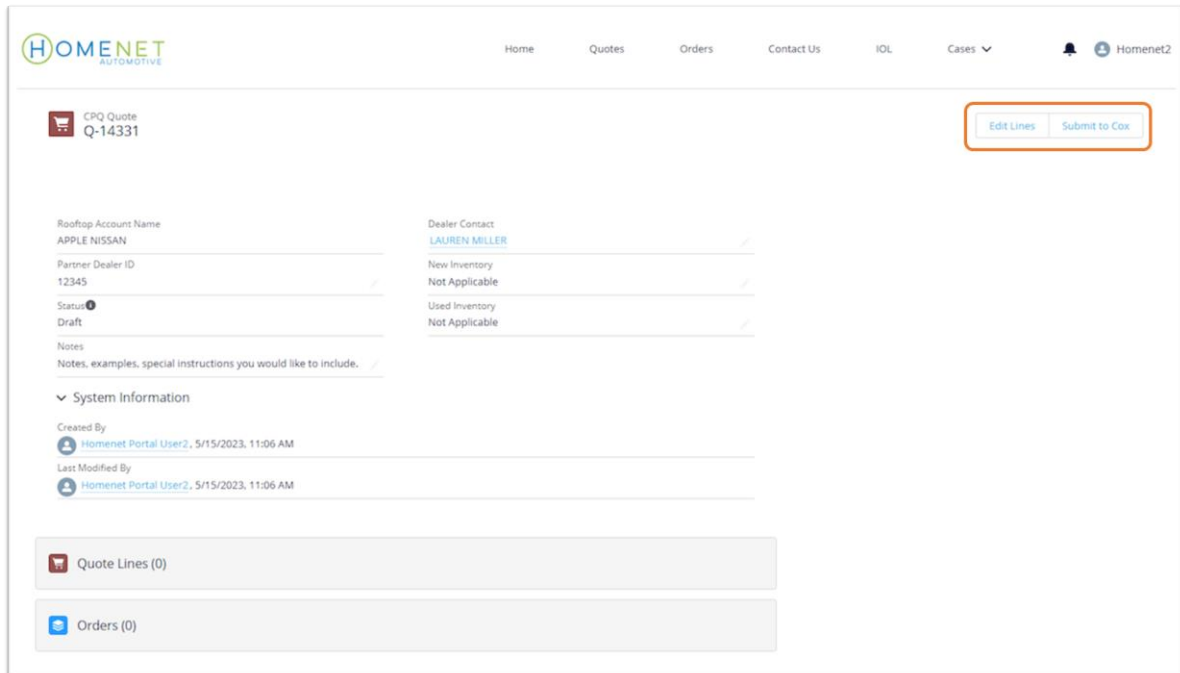
Cancel Save

- If you need to undo your changes before saving, click the undo error within the field to change back to the original information.

Partner Dealer ID 

50000000

- Clicking save will take you back to the original quote review screen. If all information is correct, click **Submit to Cox**.

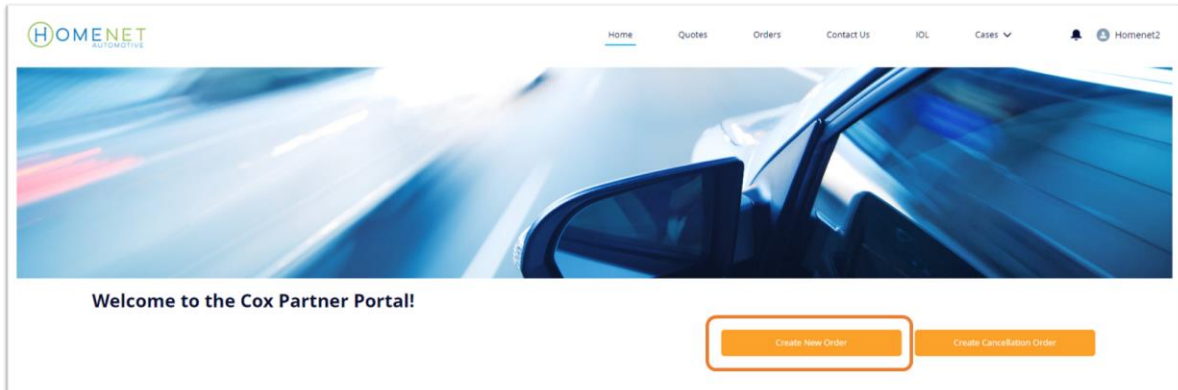


Placing Orders on New Accounts

An order must be created anytime you need to add a product. Follow these steps to place an order for an account that has not yet been set up in the system:

Note that if a new account is needed, order implementation will be delayed so the account can be verified and created in the system. Please allow for additional time for the set-up process to occur.

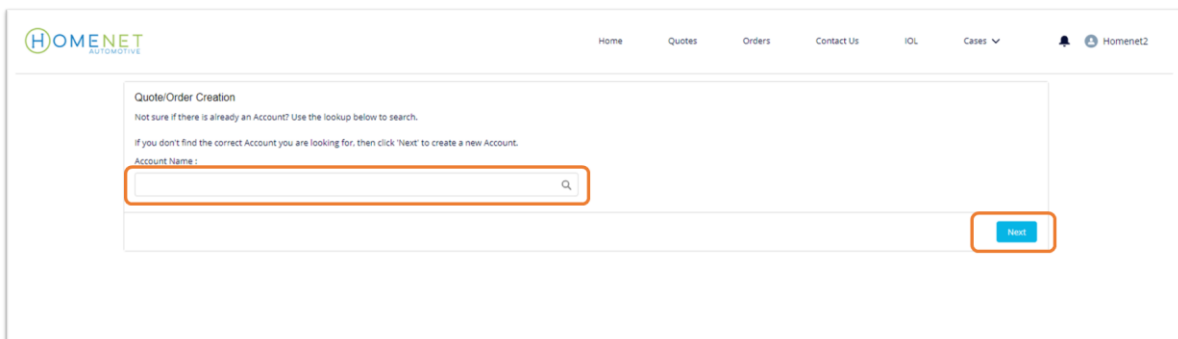
- Click on **Create New Order**



Creating a new Account.

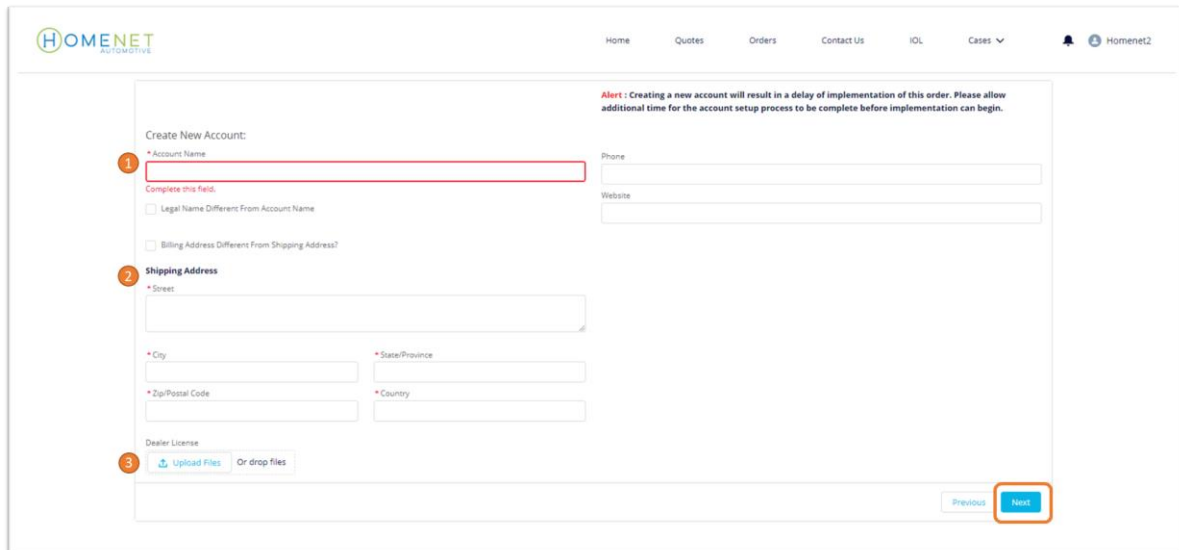
If an order is for a new account that is not already in the system, a new account must be created before you can proceed.

- Leave **Account Name** field blank and click **Next**.



- Complete the required fields:
 1. Account Name (Partner Dealer ID)
 2. If you want to specify a different legal name, select the check box and add the legal name

3. If the billing address is different from the Shipping Address, select the check box and add the billing address.
4. Shipping address
 - a. Check if billing address is different than shipping address.
5. Dealer License
 - a. Upload a copy of the new account’s dealer license. Not adding the dealer license when the account is initially created will delay the amount of time it takes to get your account set up.



The screenshot shows the 'Create New Account' form on the HOMENET AUTOMOTIVE website. The form is divided into three main sections: 'Create New Account', 'Shipping Address', and 'Dealer License'. The 'Create New Account' section includes a text input for 'Account Name' (marked with a red '1'), a 'Phone' input, a 'Website' input, and two checkboxes: 'Legal Name Different From Account Name' and 'Billing Address Different From Shipping Address?'. The 'Shipping Address' section includes inputs for 'Street' (marked with a red '2'), 'City', 'State/Province', 'Zip/Postal Code', and 'Country'. The 'Dealer License' section includes an 'Upload Files' button and the text 'Or drop files' (marked with a red '3'). At the bottom right, there are 'Previous' and 'Next' buttons, with the 'Next' button highlighted by a red box.

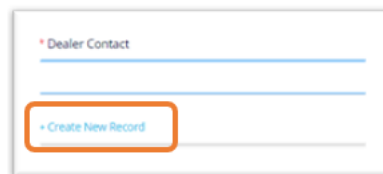
- Click **Next**

Note that creating a new account will require additional time for the account setup process to be complete.

Entering Order Information – New Dealer

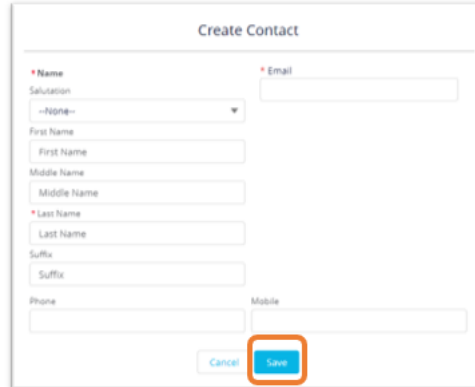
If the order is for a new dealer, complete the following steps:

- Complete **Partner Dealer ID**, **New Inventory**, and **Used Inventory** fields.
- For Dealer Contact, select **Create New Record**.



A screenshot of a dropdown menu titled "Dealer Contact". The menu is open, showing a list of options. The option "Create New Record" is highlighted with an orange border.

- Enter applicable contact information (last name and email address are required fields, but it's recommended you complete as much information as possible). Click **Save**.



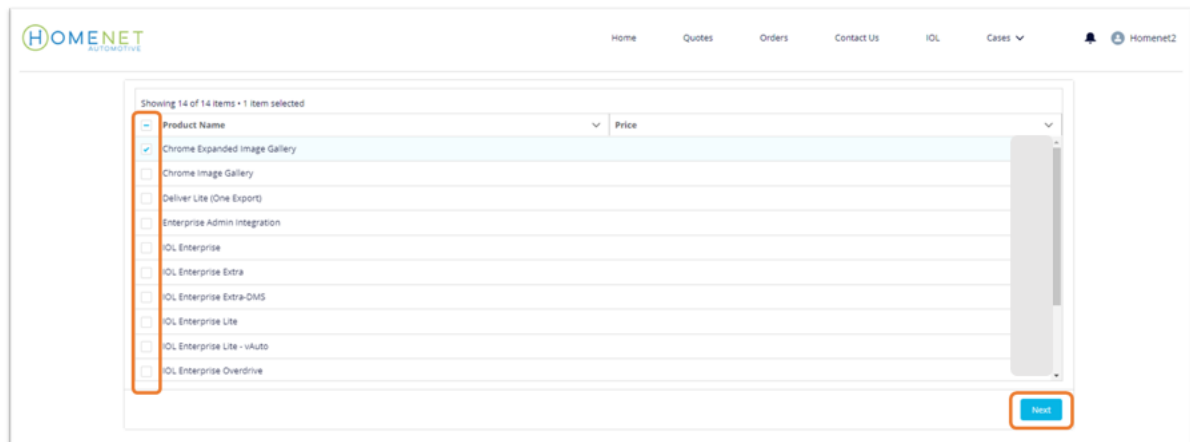
A screenshot of the "Create Contact" form. The form contains several input fields: "Salutation" (dropdown menu), "First Name", "Middle Name", "Last Name", "Suffix", "Phone", and "Mobile". There are also "Cancel" and "Save" buttons at the bottom. The "Save" button is highlighted with an orange border.

- Add any applicable notes to the order and click **Next**.



Select Products

- Check the boxes for the applicable products for the order. Only products that are approved and assigned to the reseller account will populate.




- Click **Next**.

Review Quote

Before the order has been submitted, it is referred to as a “Quote” in the Partner Portal. Review all of the information on the Quote Details page for accuracy.


- To edit any quote line items, click **Edit Lines**. Make your changes and **click Save**.

 CPQ Quote
Q-14871

Edit Lines
Submit to Cox

Rooftop Account Name Apple Nissan Test	Dealer Contact John Smith
Partner Dealer ID 56893164	New Inventory Not Applicable
Status ⓘ Approved	Used Inventory vAuto
Notes	

- Hover over the product to view the pencil icon and make any changes. Click **Save**.


 Q-14871
Edit Quote

Quick Save
Calculate
Cancel
Save
⚙️

☆ Apple Nissan Test
 [Add Products](#)

Additional Dis... ⓘ

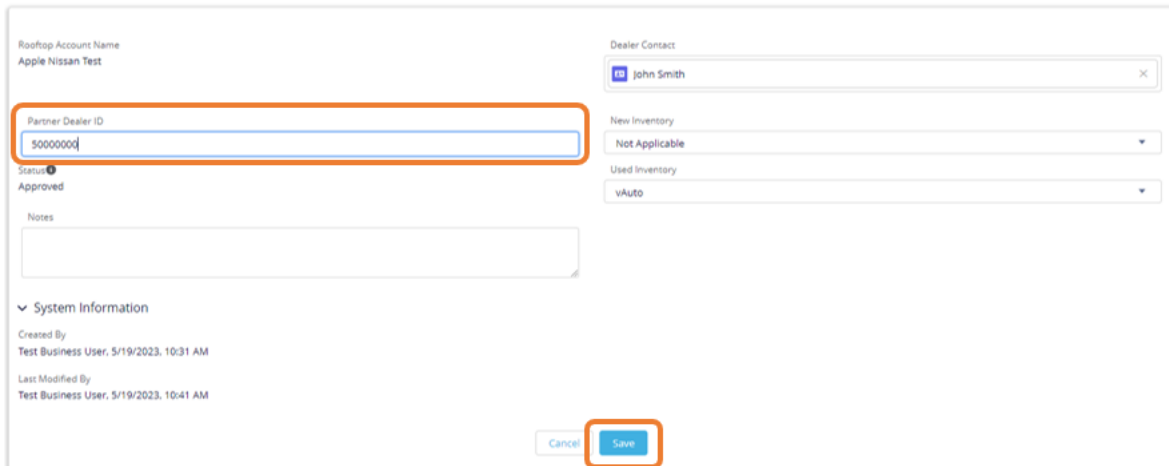
Click to edit description.

	#	TEMPLATE	QUANTITY	CUSTOMER TOTAL
☆	1	IOL Lite 	1	USD 0.00
ⓘ	2	IOL Lite Setup	1	USD 0.00
SUBTOTAL:				USD 0.00

- To edit other information such as the Partner Dealer ID, add notes, change the contact name, etc. click the pencil icon next to the field you wish to edit. Make your changes and **click Save**.

Partner Dealer ID
56893164

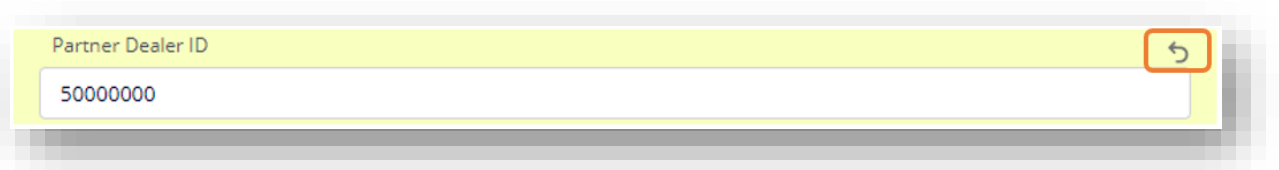




The screenshot shows a web form with the following fields and elements:

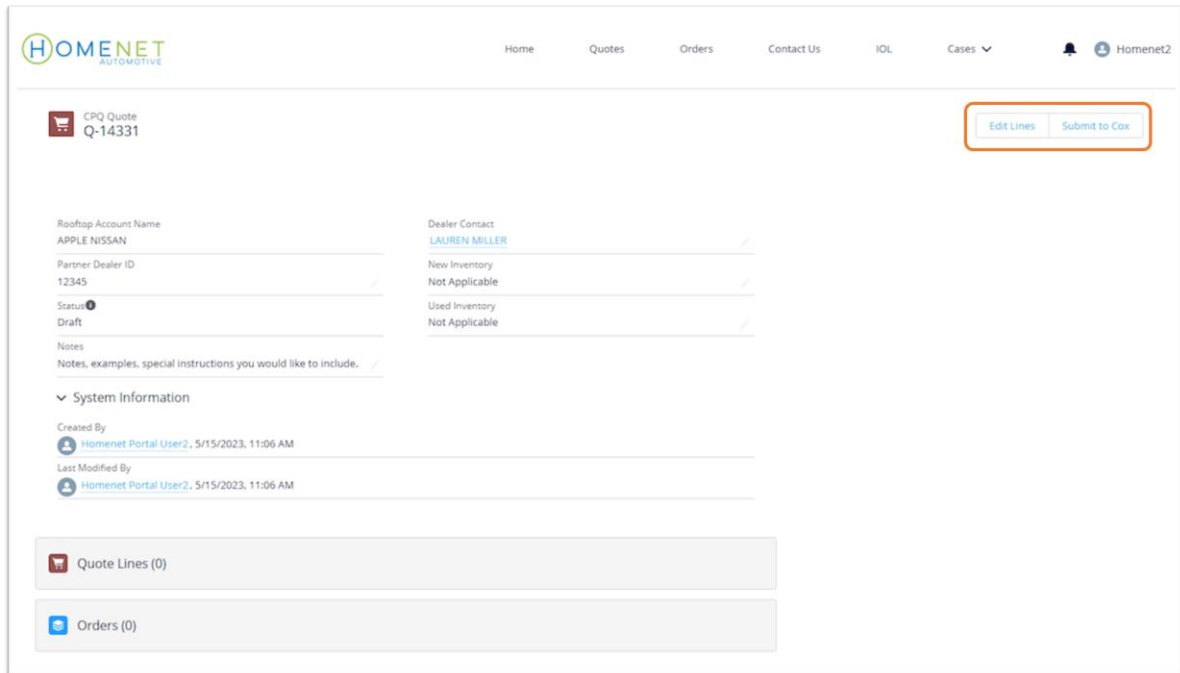
- Rooftop Account Name:** Apple Nissan Test
- Partner Dealer ID:** 50000000 (highlighted with an orange border)
- Status:** Approved
- Notes:** (empty text area)
- System Information:**
 - Created By: Test Business User, 5/19/2023, 10:31 AM
 - Last Modified By: Test Business User, 5/19/2023, 10:41 AM
- Dealer Contact:** John Smith
- New Inventory:** Not Applicable
- Used Inventory:** vAuto
- Buttons:** Cancel and Save (the Save button is highlighted with an orange border)

If you need to undo your changes before saving, click the undo error within the field to revert back to the original information in the field.

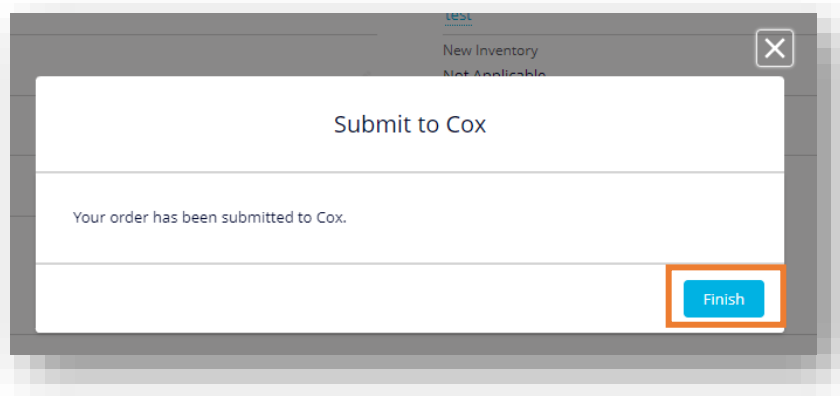


A close-up view of the Partner Dealer ID input field. The field contains the text "50000000". To the right of the text is a small square button with a circular arrow icon, which is highlighted with an orange border. This button is used to revert the field to its original value.

- Clicking save will take you back to the original quote review screen. If all information is correct, click **Submit to Cox**.

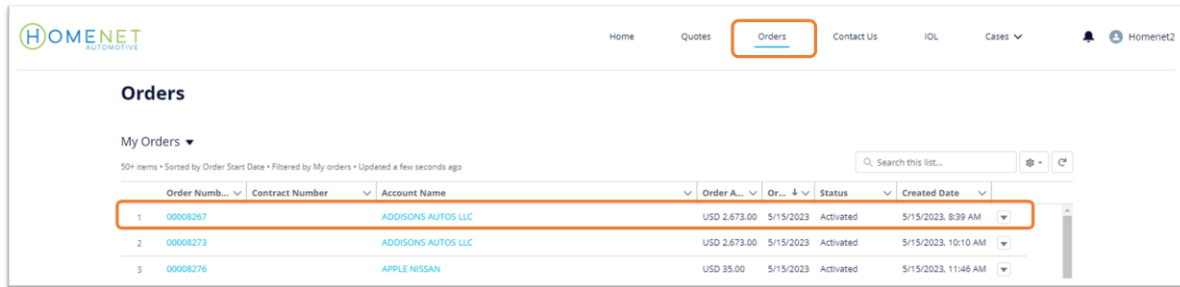


- Once you have submitted the order, click **Finish** to close the confirmation pop-up.



Review Order

Submitted orders will now populate under the **Orders** tab from the homepage.



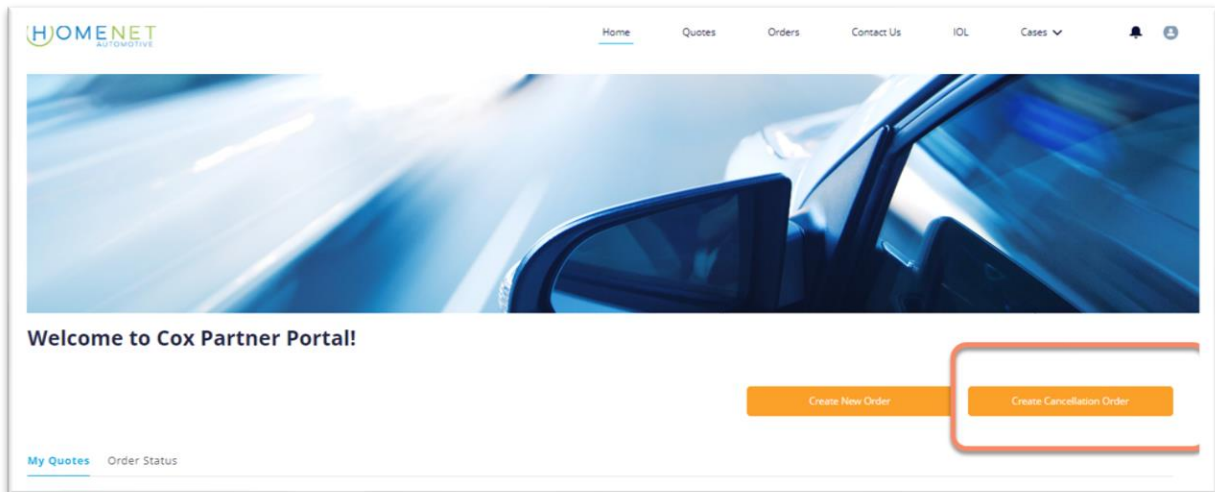
The screenshot shows the 'Orders' section of the HomeNet Automotive portal. The 'Orders' tab is highlighted in the navigation bar. Below the navigation, there is a search bar and a table of orders. The first row of the table is highlighted with an orange box.

Order Num...	Contract Number	Account Name	Order A...	Or...	Status	Created Date
1	00008267	ADDISONS AUTOS LLC	USD 2,673.00	5/15/2023	Activated	5/15/2023, 8:39 AM
2	00008273	ADDISONS AUTOS LLC	USD 2,673.00	5/15/2023	Activated	5/15/2023, 10:10 AM
3	00008276	APPLE NISSAN	USD 35.00	5/15/2023	Activated	5/15/2023, 11:46 AM

Cancellations

To cancel a quote or order, follow these steps:

- Go to HomeNet Portal Homepage.
- Click on **Create Cancellation Order**.



- Search for Account Name (it will only show accounts that have active accounts delivered).
- Click on **Account Name**.

Cancel Quote/Order Creation

Account Name

NATION apple nissan
Shipping 4899 PEARL RDCLEVELAND, OH 44109-5107USA

Test Account Creation Flow V2
Shipping Address TEst stNj 00001USA

MULESOFT TO AWS TRANSITION - CANADIAN INDEPENDENT DEALER - 10/25/2020
Shipping Address 7755-110 AVE NWCALGARY, AB T3R 1R8CAN

- Click Next.

Cancel Quote/Order Creation

Account Name

APPLE NISSAN

Next

- Click on **Amend Subscriptions**.

HOMENET AUTOMOTIVE

Home Quotes Orders Contact Us IOL Cases

Q-14509 Edit Quote Quick Save Calculate Cancel Save

☆ APPLE NISSAN Amend Subscriptions Additional Disc. (%)

Click to edit description.

This group has no line items. Click on Add Products button or drag lines from other groups.

- Select the product(s) to be cancelled. Click **Select**.

Q-14304 Subscription Selection 9

CONTRACT #	SUBSCRIBER	PRODUCT NAME	RENEWAL QUANTITY	START DATE	END DATE
<input type="checkbox"/> 00013756	APPLE NISSAN	IOL Enterprise	1.00	5/5/2023	5/4/2026
<input type="checkbox"/> 00013756	APPLE NISSAN	Chrome Image Gallery	1.00	5/5/2023	5/4/2026
<input type="checkbox"/> 00013756	APPLE NISSAN	IOL Enterprise	1.00	5/5/2023	5/4/2026
<input type="checkbox"/> 00013756	APPLE NISSAN	IOL Enterprise Lite	1.00	5/5/2023	5/4/2026
<input type="checkbox"/> 00013756	APPLE NISSAN	SnapLot	1.00	5/5/2023	5/4/2026
<input type="checkbox"/> 00013756	APPLE NISSAN	IOL Enterprise	1.00	5/5/2023	5/4/2026
<input type="checkbox"/> 00013756	APPLE NISSAN	IOL Enterprise Extra	1.00	5/5/2023	5/4/2026
<input type="checkbox"/> 00013756	APPLE NISSAN	IOL Enterprise	1.00	5/12/2023	5/11/2026
<input type="checkbox"/> 00013756	APPLE NISSAN	IOL Enterprise Extra	1.00	5/12/2023	5/11/2026

- Under the **Quantity** column, click the pencil icon and change the value from 1 to 0.

CPQ Quote Information

Dealer Contact

☆ APPLE NISSAN

Click to edit description.

CONTRACT #	TEMPLATE	QUANTITY	CUSTOMER TOTAL
<input type="checkbox"/> 1	IOL Enterprise	0	USD - 125.00
<input type="checkbox"/> 2	IOL Enterprise Extra-DMS	1	USD 0.00
SUBTOTAL:			USD - 125.00

- Click **Quick Save** to continue to make changes and prevent progress loss.

Q-14304 Edit Quote

CPQ Quote Information

Dealer Contact

☆ APPLE NISSAN

Click to edit description.

CONTRACT #	TEMPLATE	QUANTITY	CUSTOMER TOTAL
<input type="checkbox"/> 1	IOL Enterprise	0	USD - 125.00
<input type="checkbox"/> 2	IOL Enterprise Extra-DMS	0	USD - 199.00
SUBTOTAL:			USD - 324.00

- From the **Customer Total** column, click the **drop-down arrow**.

CPQ Quote Information

Dealer Contact Search Contacts

☆ APPLE NISSAN [Amend Subscriptions](#)

Click to edit description.

<input type="checkbox"/> #	TEMPLATE	QUANTITY	CUSTOMER TOTAL
<input type="checkbox"/> 1	IOL Enterprise	0	USD - 125.00
<input type="checkbox"/> 2	IOL Enterprise Extra-DMS	1	USD 0.00
SUBTOTAL:			USD - 125.00

- Set **Bill Through Date** to the current date. Change the **Take Down Date** if applicable.

☆ APPLE NISSAN [Amend Subscriptions](#)

Click to edit description.

<input type="checkbox"/> #	TEMPLATE	QUANTITY	CUSTOMER TOTAL
<input type="checkbox"/> 1	IOL Enterprise	0	USD - 125.00
ALTERNATE DESCRIPTION		BILL THROUGH DATE 5/12/2023	TAKE DOWN DATE 5/12/2023
HIDDEN		SAVE STATUS	PFA ACCOUNT HomeNet-0014200001oA6cyAAC
PFA NAME			
<input type="checkbox"/> 2	IOL Enterprise Extra-DMS	0	USD - 199.00
SUBTOTAL:			USD - 324.00

- Click **Save**

Q-14304 **Edit Quote** [Quick Save](#) [Calculate](#) [Cancel](#) [Save](#)

CPQ Quote Information

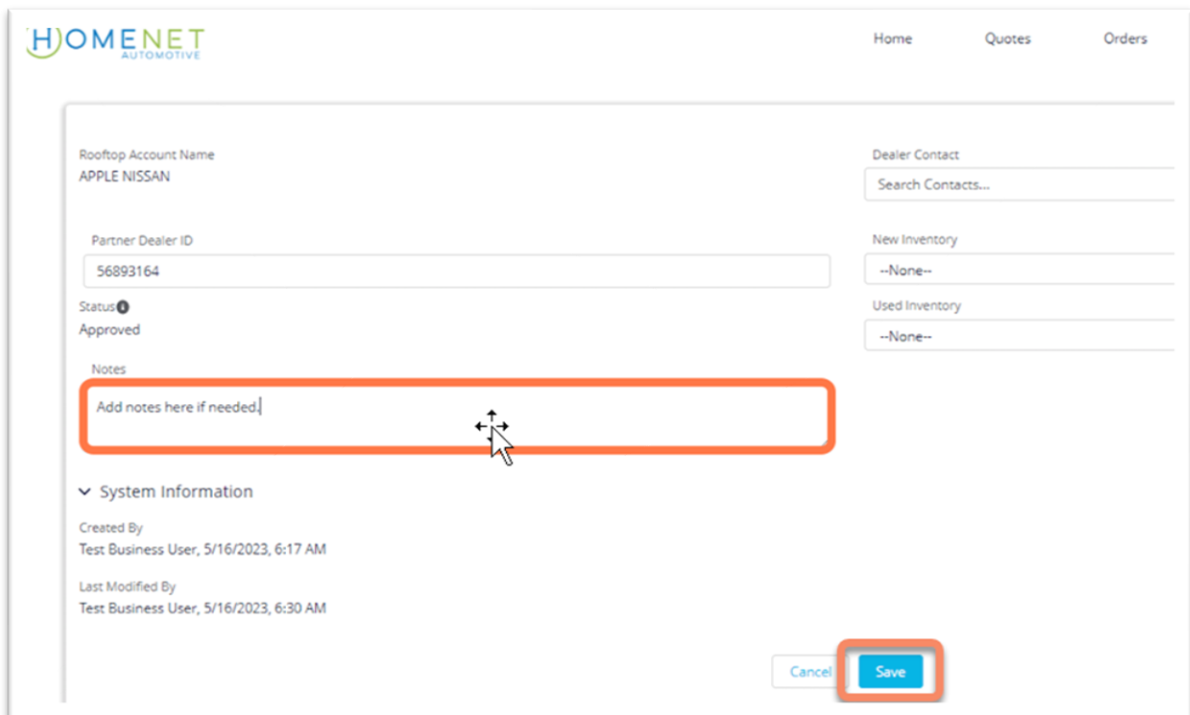
Dealer Contact Search Contacts

☆ APPLE NISSAN [Amend Subscriptions](#)

Click to edit description.

<input type="checkbox"/> #	TEMPLATE	QUANTITY	CUSTOMER TOTAL
<input type="checkbox"/> 1	IOL Enterprise	0	USD - 125.00
<input type="checkbox"/> 2	IOL Enterprise Extra-DMS	0	USD - 199.00
SUBTOTAL:			USD - 324.00

- From the cancellation overview, add notes if applicable and click **Save**.



HOMENET AUTOMOTIVE Home Quotes Orders

Rooftop Account Name
APPLE NISSAN

Partner Dealer ID
56893164

Status **Approved**

Notes
Add notes here if needed

Dealer Contact
Search Contacts...

New Inventory
--None--

Used Inventory
--None--

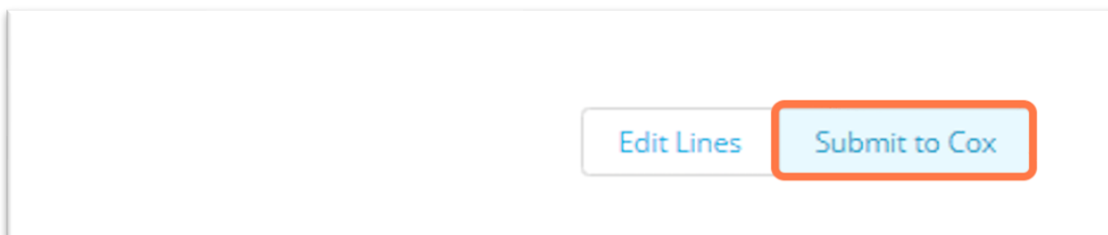
System Information

Created By
Test Business User, 5/16/2023, 6:17 AM

Last Modified By
Test Business User, 5/16/2023, 6:30 AM

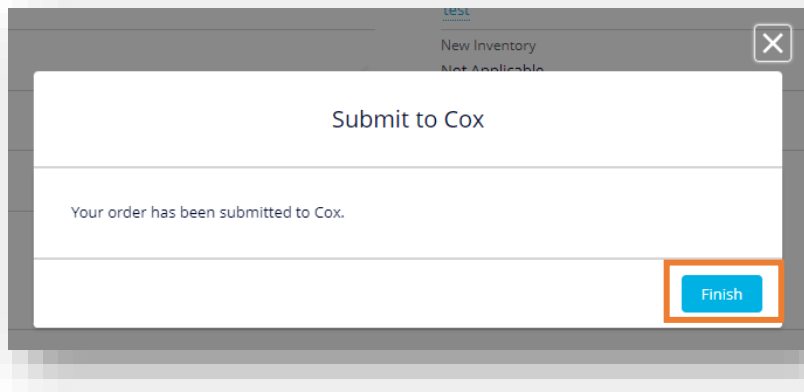
Cancel Save

- Click **Submit to Cox**.



Edit Lines Submit to Cox

- Once you have submitted the order, click **Finish** to close the confirmation pop-up.



Status Tracking

Status Descriptions

Quotes and orders will reflect different statuses depending on where they are in the process. The following are descriptions for each status:

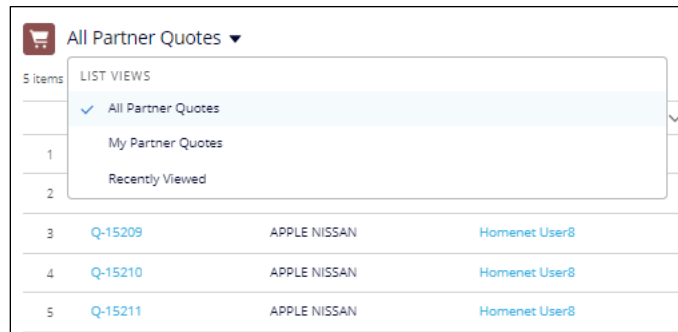
Quote status descriptions

Stage	Status Name	Description
Quote	Approved	Quote with products has been saved but not submitted to Cox.
Quote	Pending	Quote has been submitted to Cox using a new account. The order will not yet show under Orders View.
Order	Activated	Order has been created and is in the implementation phase.
Order	Order Completed	Implementation has been completed and sent to billing.

List Views of Quotes

When reviewing quotes, they can be viewed via the following list views:

- All Partner Quotes
- My Partner Quotes
- Recently Viewed

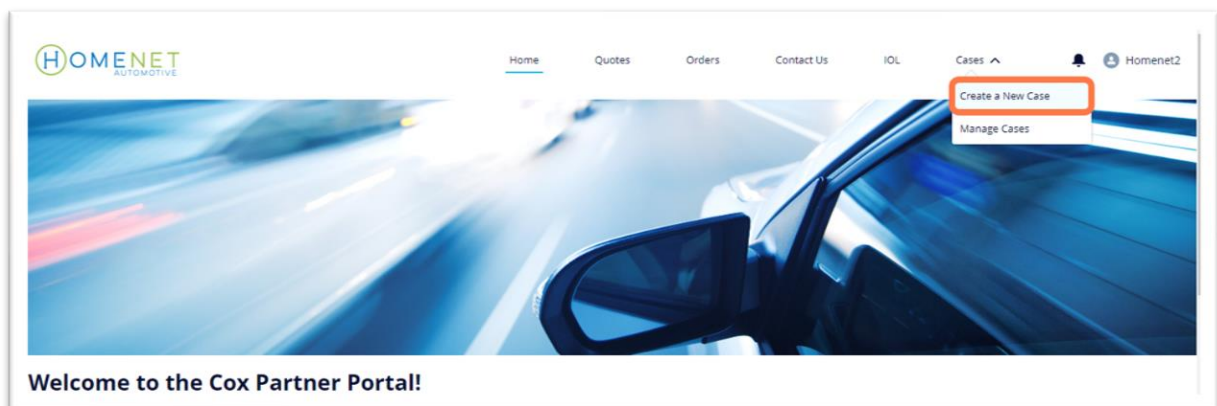


All Partner Quotes ▾		
5 items		
LIST VIEWS		
✓	All Partner Quotes	
	My Partner Quotes	
	Recently Viewed	
3	Q-15209	APPLE NISSAN Homenet User8
4	Q-15210	APPLE NISSAN Homenet User8
5	Q-15211	APPLE NISSAN Homenet User8

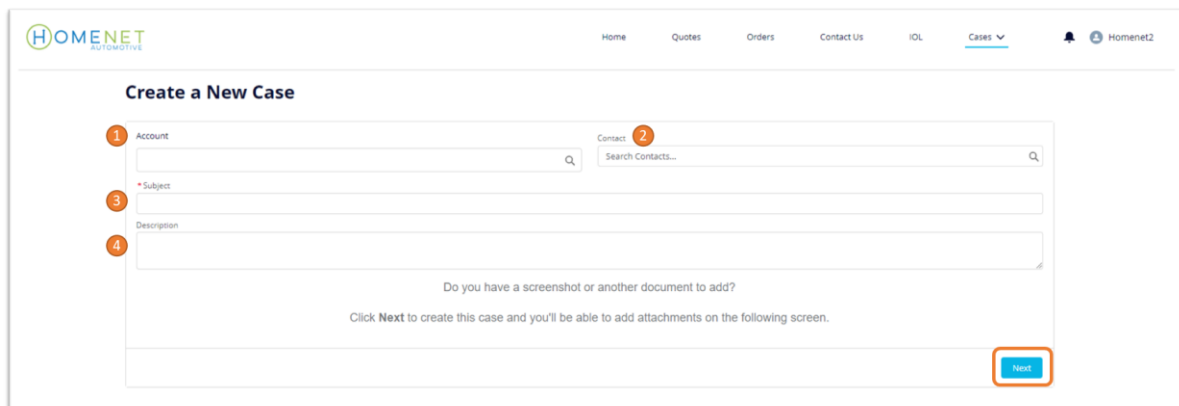
Support Tickets/Cases

Support tickets are now referred to as cases. Cases will be submitted anytime there is an issue.

- To submit a case, go to the **Cases** tab on the home screen. Click on **Create a New Case**.



- Complete all necessary fields:
 1. Account – search by dealership/CA account. Confirm it is the right account by the shipping address associated with it.
 2. Contact – will populate all contacts in the system. This field is not required. If a contact name is not selected, the case will be logged by the user.
 3. Subject – ex: missing images
 4. Description – provide a description of the issue.
 5. Click **next**.

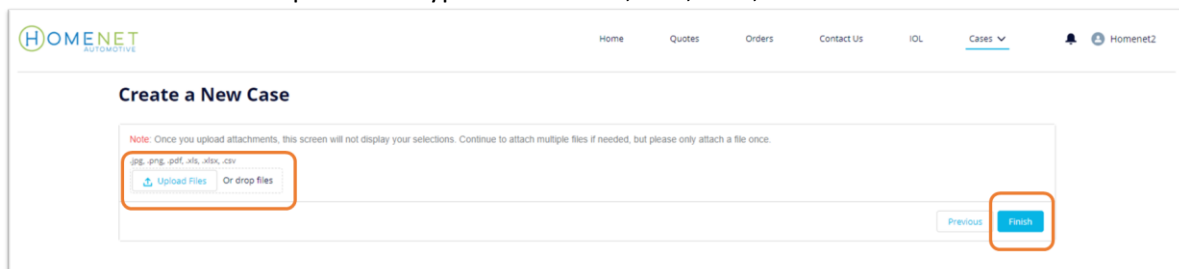


The screenshot shows the 'Create a New Case' form. It includes a navigation bar with 'Home', 'Quotes', 'Orders', 'Contact Us', 'IOL', 'Cases', and a user profile 'Homenet2'. The form fields are:

- 1. Account: A search field with a magnifying glass icon.
- 2. Contact: A search field labeled 'Search Contacts...' with a magnifying glass icon.
- 3. Subject: A text input field.
- 4. Description: A larger text input field.

 Below the fields, there is a prompt: 'Do you have a screenshot or another document to add? Click Next to create this case and you'll be able to add attachments on the following screen.' A blue 'Next' button is located at the bottom right of the form.

- Upload any applicable attachments by clicking **Upload Files** or dragging and dropping files to the screen. Acceptable file types include JPG, PDF, PNG, XLS. Click **Finish**.

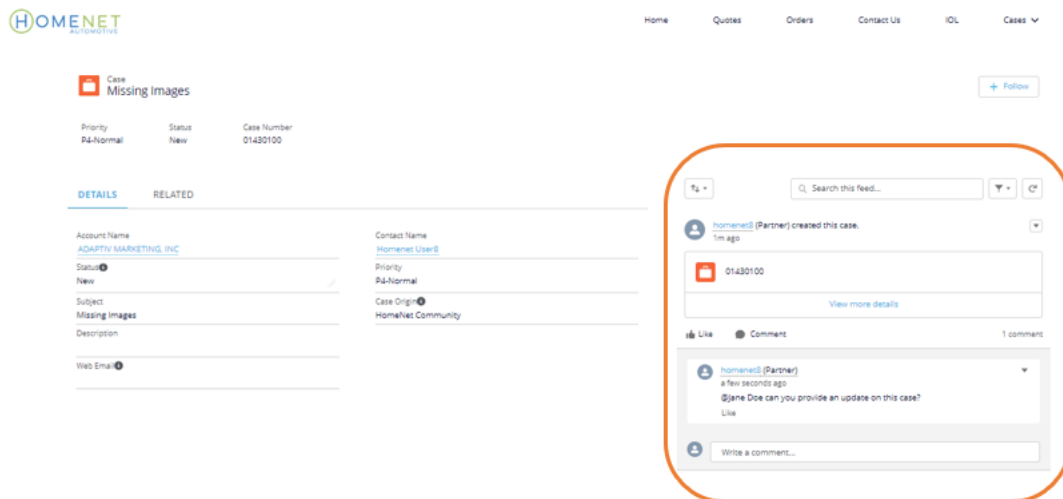


The screenshot shows the attachment upload step of the 'Create a New Case' form. It includes the same navigation bar as the previous screenshot. A note reads: 'Note: Once you upload attachments, this screen will not display your selections. Continue to attach multiple files if needed, but please only attach a file once.' Below the note, there is a box containing the text 'jpg, png, pdf, xls,.xlsx, csv' and two buttons: 'Upload Files' (with a cloud icon) and 'Or drop files'. At the bottom right, there are 'Previous' and 'Finish' buttons. The 'Upload Files' and 'Finish' buttons are highlighted with orange boxes.

- Access the case view.

Feed

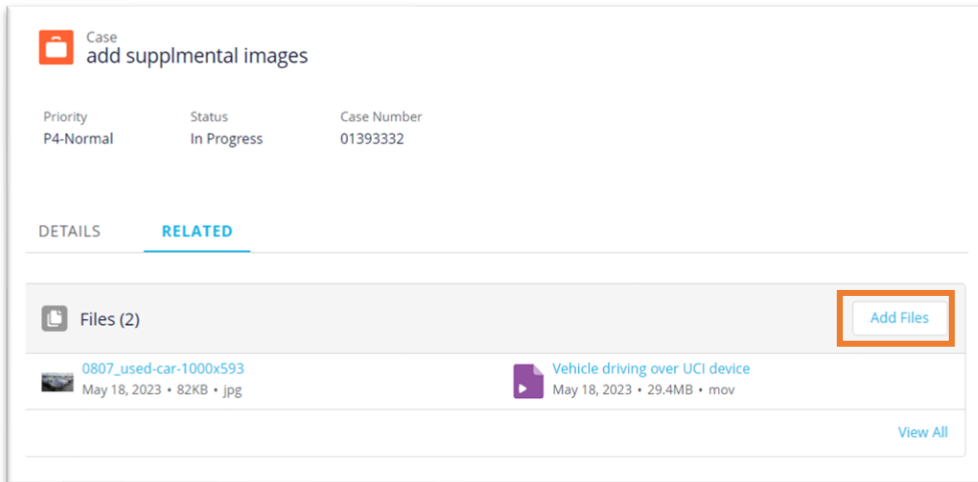
The feed provides a tracking list of updates that have been made to the case. Users can communicate with Cox Automotive on the case, ask questions, request a status update, etc. Users can @mention and receive a notification when there is a response. The user who created a case will automatically follow the case.



Editing Cases and Viewing Files

Once a case has been created, additional files can still be added. Navigate to the case details page by clicking the case number or subject line from one of the Cases List Views.

- To add files, navigate to the Related tab and **click Add Files**. Select the files you wish to add and **click Add**.





Case
add supplemental images

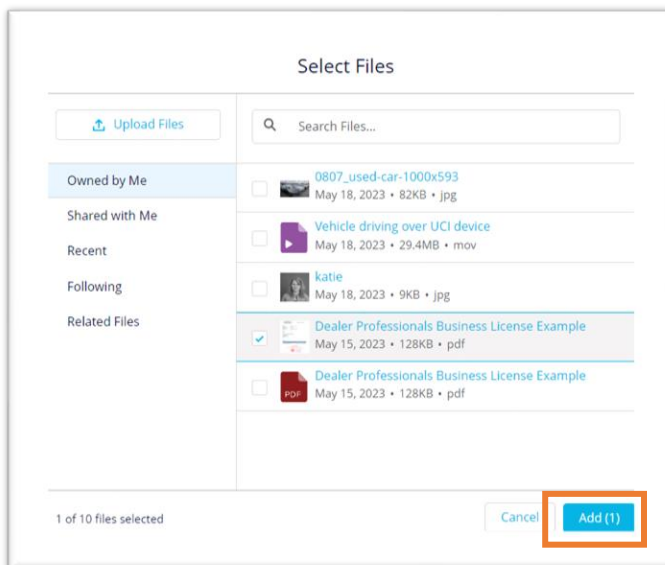
Priority: P4-Normal Status: In Progress Case Number: 01393332

DETAILS **RELATED**

Files (2) Add Files

 0807_used-car-1000x593 May 18, 2023 • 82KB • jpg	 Vehicle driving over UCI device May 18, 2023 • 29.4MB • mov
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[View All](#)



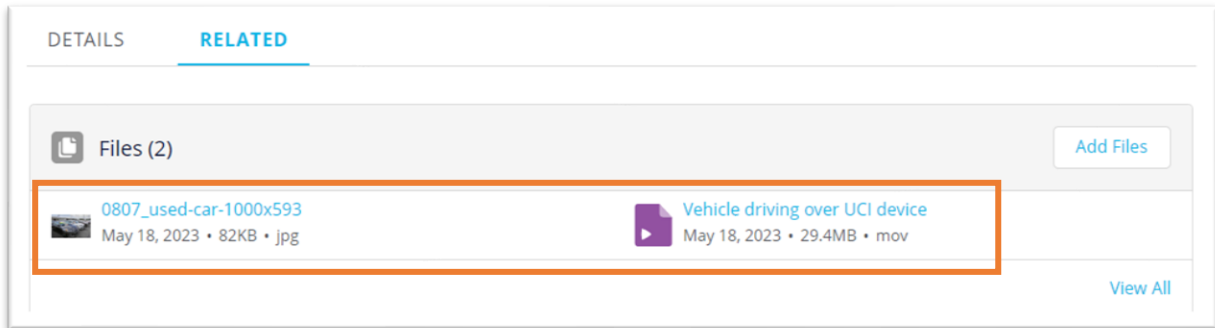
Select Files

[Upload Files](#) Search Files...

Owned by Me	<input type="checkbox"/> 0807_used-car-1000x593 May 18, 2023 • 82KB • jpg
Shared with Me	<input type="checkbox"/> Vehicle driving over UCI device May 18, 2023 • 29.4MB • mov
Recent	<input type="checkbox"/> katie May 18, 2023 • 9KB • jpg
Following	<input checked="" type="checkbox"/> Dealer Professionals Business License Example May 15, 2023 • 128KB • pdf
Related Files	<input type="checkbox"/> Dealer Professionals Business License Example May 15, 2023 • 128KB • pdf

1 of 10 files selected [Cancel](#) Add (1)

- Files previously added to the case will also be visible on the Related tab.



Cases Tracking

Track existing cases that have previously been created.

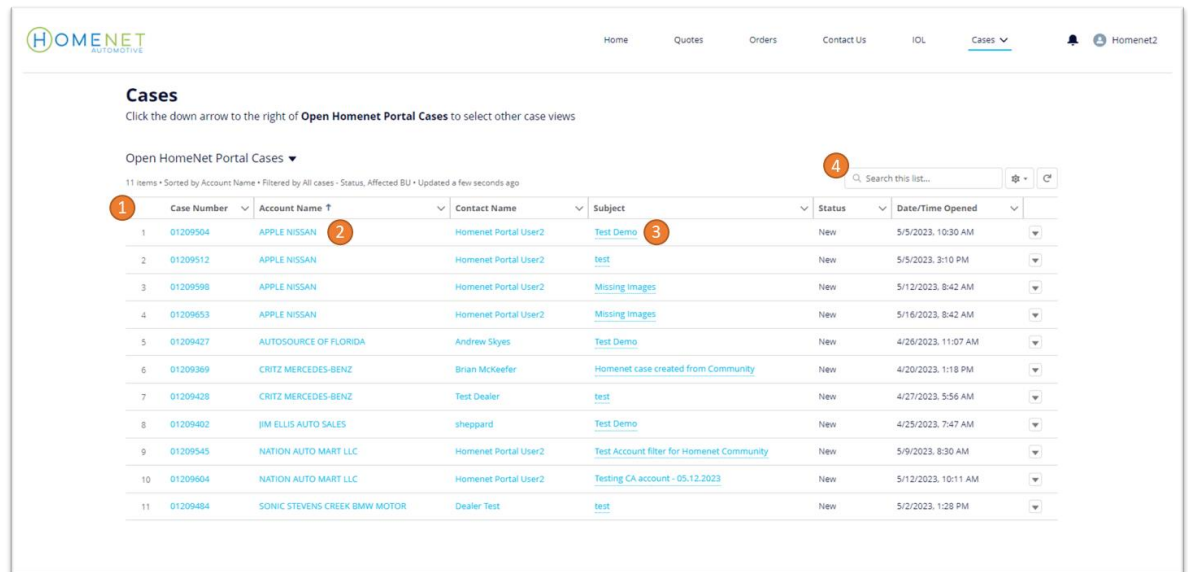
- From the Homepage, go to **Cases**. Then click **Manage Cases**.



Welcome to Cox Partner Portal!

- The Cases page shows all open cases. It provides the following capabilities:
 1. Columns - The view can be sorted by clicking on any column header and sorting alphabetically or chronologically.
 2. Account Name – access the details of a specific case by clicking on the case number, account name, or contact name.
 3. Subject – hover over the subject of a case to view additional details.

4. Search – use any of the column names.



The screenshot shows the 'Cases' page in the HOMENET AUTOMOTIVE system. At the top, there are navigation links for Home, Quotes, Orders, Contact Us, IOL, and Cases. Below the navigation is a search bar with the text 'Search this list...'. The main content area is titled 'Cases' and includes a sub-header 'Open HomeNet Portal Cases'. Below this is a table with 11 items, sorted by Account Name. The table has columns for Case Number, Account Name, Contact Name, Subject, Status, and Date/Time Opened. Red circles with numbers 1 through 4 highlight specific elements: 1 on the Case Number column header, 2 on the Account Name column header, 3 on the Subject column header, and 4 on the search bar.

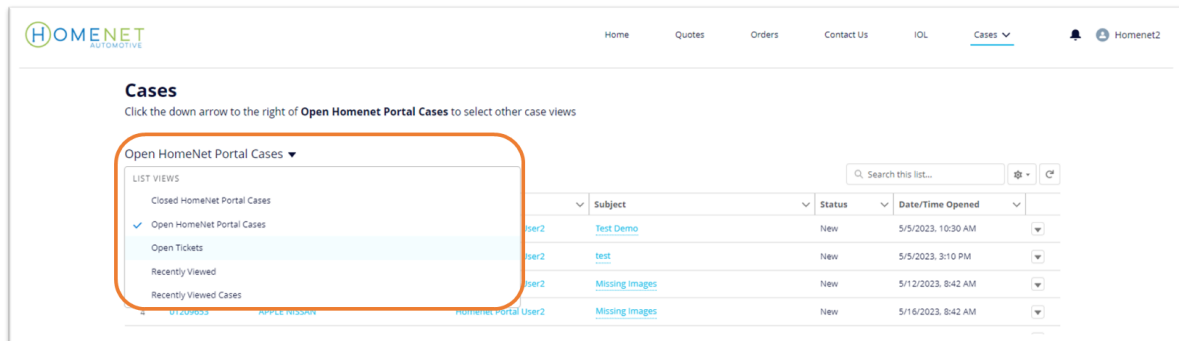
Case Number	Account Name	Contact Name	Subject	Status	Date/Time Opened
01209504	APPLE NISSAN	Homenet Portal User2	Test Demo	New	5/5/2023, 10:30 AM
01209512	APPLE NISSAN	Homenet Portal User2	test	New	5/5/2023, 3:10 PM
01209598	APPLE NISSAN	Homenet Portal User2	Missing images	New	5/12/2023, 8:42 AM
01209653	APPLE NISSAN	Homenet Portal User2	Missing images	New	5/16/2023, 8:42 AM
01209427	AUTOSOURCE OF FLORIDA	Andrew Skyes	Test Demo	New	4/26/2023, 11:07 AM
01209369	CRITZ MERCEDES-BENZ	Brian McKeefer	Homenet case created from Community	New	4/20/2023, 1:18 PM
01209428	CRITZ MERCEDES-BENZ	Test Dealer	test	New	4/27/2023, 5:56 AM
01209402	JIM ELLIS AUTO SALES	sheppard	Test Demo	New	4/25/2023, 7:47 AM
01209545	NATION AUTO MART LLC	Homenet Portal User2	Test Account filter for Homenet Community	New	5/9/2023, 8:30 AM
01209604	NATION AUTO MART LLC	Homenet Portal User2	Testing CA account - 05.12.2023	New	5/12/2023, 10:11 AM
01209484	SONIC STEVENS CREEK BMW MOTOR	Dealer Test	test	New	5/2/2023, 1:28 PM

List Views of Cases

The cases that populate under **Manage Cases** include all cases submitted for the reseller, not just ones that have been individually submitted.

The following are the different list views for cases:

- Closed HomeNet Portal Cases – closed cases from current and previous year.
- Open HomeNet Portal Cases
- Open Tickets
- Recently Viewed
- Recently Viewed Cases



Cases
Click the down arrow to the right of **Open HomeNet Portal Cases** to select other case views

Open HomeNet Portal Cases ▾

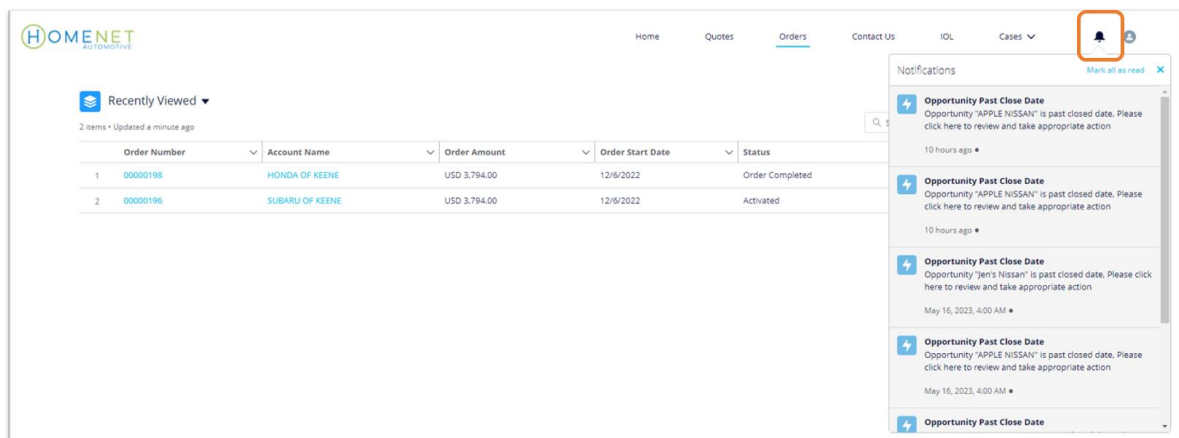
LIST VIEWS

- Closed HomeNet Portal Cases
- ✓ Open HomeNet Portal Cases
- Open Tickets
- Recently Viewed
- Recently Viewed Cases

Subject	Status	Date/Time Opened
Test Demo	New	5/5/2023, 10:30 AM
test	New	5/5/2023, 3:10 PM
Missing Images	New	5/12/2023, 8:42 AM
Missing Images	New	5/16/2023, 8:42 AM

Notifications

Notifications are visible from the Homepage by clicking the bell icon next to the account image in the top right corner. For example, if a case status changes, a comment is made, the user is tagged in a comment, etc. For most case changes (ex: creation or closing of a case), an email notification will also be sent.



Orders

Recently Viewed ▾

2 items • Updated a minute ago

Order Number	Account Name	Order Amount	Order Start Date	Status
00000198	HONDA OF KEENE	USD 3,794.00	12/6/2022	Order Completed
00000196	SUBARU OF KEENE	USD 3,794.00	12/6/2022	Activated

Notifications Mark all as read ✕

- Opportunity Past Close Date**
Opportunity "APPLE NISSAN" is past closed date. Please click here to review and take appropriate action
10 hours ago
- Opportunity Past Close Date**
Opportunity "APPLE NISSAN" is past closed date. Please click here to review and take appropriate action
10 hours ago
- Opportunity Past Close Date**
Opportunity "Jens Nissan" is past closed date. Please click here to review and take appropriate action
May 16, 2023, 4:00 AM
- Opportunity Past Close Date**
Opportunity "APPLE NISSAN" is past closed date. Please click here to review and take appropriate action
May 16, 2023, 4:00 AM
- Opportunity Past Close Date**