

DLP Access form

THIS FORM MUST ACCOMPANY A CISM ticket (logged via DCX Workplace or via Service Desk x5999)

CISM TICKET NR: _____		DATE: _____	
A. APPLICANT DETAIL			
NAME & SURNAME: _____			
NETWORK ID: _____		TEL/EXT: _____	
E-MAIL: _____			
Dealership: _____			
Type of user ☐ Internal ☐ Dealership			
DEPT: ☐ Sales/Marketing ☐ Finance/Controlling ☐ Customer Services ☐ IT			
☐ CV ☐ Other (specify): _____			
B. ACCESS REQUIRED			
Please select your required roles below			
C. APPLICANT SIGNATURE			
SIGNATURE: _____		DATE: _____	
D. MANAGER APPROVAL			
<i>I confirm that the applicant was given sufficient hand-over and training.</i>			
NAME (PRINT): _____		TEL/EXT: _____	
SIGNATURE: _____		DATE: _____	

* Base profile to be created by Service Desk

** Specialised roles to be actioned by the IT team

Dealership Roles

DLP Role	Description	Assign to	Role Required
Sales Transaction System			
Sales Clerk	Able to CREATE, MODIFY and VIEW Sales Queries and quotes for linked dealers	1) Sales Clerk 2) IT	☐
Sales Manager	Able to create , modify and view sales queries and quotes for linked dealers, cancel sales queries for linked dealers, view fund transactions, view stock dashboard, view sales query forecast for linked dealerships	1) Sales Manager 2) IT	☐
Certified Pre-owned			
Certified Pre-owned Clerk	Able to UPLOAD/MODIFY Certified Pre-owned Images/Media for linked dealers	1) CPO clerk 2) IT	☐
CV Sales Forecast			
CV Sales Manager	Able to CREATE, MODIFY, VIEW and CANCEL Sales Forecast Queries for linked dealers	1) CV sales manager 2) IT	☐
Leads			
Leads Dealer BDC	Able to Assign Leads to Sales Executives for OWN or LINKED dealerships	1) BDC agent at the dealership 2) Sales manager 3) IT	☐
Leads dealer manager	Able to view and filter leads by sales executives for linked dealerships	1) Sales manager	☐
Reports			
Dealer Report User	Able to VIEW Dealer Report Links	1) Sales manager 2) Administrator at the dealership 3) IT	☐
Request for Assistance (RFA)			
RFA User	Create and view ALL RFA's for linked dealers	1) CV sales executives 2) IT	☐
RV / Service Contract			
RV/Service Contract User	View ALL RV/Service Contract quotes for linked dealers	1) CV sales executives 2) IT	☐
Supply Chain Request			
Supply Chain User	CREATE, MODIFY and VIEW Supply Chain Requests for linked dealers	1) CV Sales administrator 2) Sales manager 3) IT	☐
Marketing Request			
Marketing Request User	CREATE, MODIFY and VIEW Marketing Requests for linked dealers	1) CV Marketing admin 2) Sales manager 3) IT	☐
Technical Assistance Freightliner/FUSO (TAFF)			
TAFF User	Able to create taff cases for linked dealerships	1) CV Technicians 2) Foreman 3) IT	☐
System & Other			
Dealer Profile Administrator	Able to CREATE and MODIFY existing staff/users within OWN or LINKED dealerships	1) Dealership administrator 2) Sales manager 3) IT	☐
Dealer Staff Viewer	Able to VIEW staff/user information for OWN or LINKED dealerships	1) Dealership administrator 2) Sales manager 3) IT	☐

Procurement			
Procurement Requisition Approver	With this role you are able to approve purchase requisitions (PR's) when your name is selected during the creation of a PR. You will also receive notifications when a PR needs approval.	1) Sandown users 2) Users assigned on the approval workflow 3) IT	☐
Procurement Requisitioner	With this role you are able to create a new Requisition for the dealerships you have been linked to. Notification are received once the approval workflow process has been completed	1) Sandown users 2) Requisitioners at the dealership 3) IT	☐
Procurement Finance (PO)	With this role a notification is received in order to create the PO in Autoline.	1) Sandown users 2) Autoline administrator at the dealership 3) IT	☐

Procurement

Requisition Area <i>(Please specify which requisition areas you are responsible for)</i>					
Capital Expenditure	☐	Capital Expenditure IT	☐	Multiple VSB	☐
Sublet Sales	☐	Sublet Services	☐	Sundry	☐
				Non-DNI	☐
				VSB	☐
Approver / Requisitioner <i>(Please specify if you are an approver, requisitioner or both)</i>					
Approver	☐	Requisitioner	☐		

Internal Roles

DLP Role	Description	Assign to	Role Required
Maintenance Contracts			
Top-Up Clerk	A user with this role is able to VIEW all Maintenance Quotes/Estimates and Maintenance Certificates for all dealers. User with this role are also able to confirm quotes where the mileage is over the minimum mileage.	1) Customer services 2) IT	☐
Top-Up Cancellation Request Clerk	A user with this role will receive a Maintenance Extension Cancellation requests via e-mail. They will provide the pricing for the cancellation request and send the request to the Top-Up Cancellation Request Approver for Approval.	1) Customer services 2) IT	☐
Top-Up Cancellation Request Approver	A user with this role will be able to do final approval of Maintenance Extension Cancellations.	1) Customer services 2) IT	☐
Top-Up Administrator	Maintain Top-Up Contract Parameters for Maintenance Extensions.	1) Customer services 2) IT	☐
Base Administrator	Maintain Base Contract Parameters for Maintenance Contracts. When adding a base contract parameter the vehicle will automatically receive a maintenance contract.	1) Customer services 2) IT	☐
Short Payment Clerk	Upload and maintain transactions for Parts that were paid short	1) Customer services 2) IT	☐
Short Payment Administrator	Process and approve transactions uploaded by the Short Payment Clerk. Expenses are updated and sent to Sirius.	1) Customer services 2) IT	☐
Mileage Capturing Clerk	Capture mileages for Commercial contracts and mileage information sent to Sirius	1) Customer services 2) IT	☐
Financial Clerk	A user with this role will be able to view all PARTS/VEHICLE/SUNDRY/STATEMENT /Direct debit /credit, scheme claim documents and Manufacturing Certificate Documents for ALL dealerships	1) Customer services 2) IT	☐
Provision Administrator	Administer and load new and additional Provisional Contract Income for each Base Maintenance Contract, access provision reports, upload provisions and additional provisions	1) Accounts team 2) IT	☐
Reactivation Approver	Able to Approve Requests for Re-activation or cancellation of Maintenance Contacts	1) Customer services 2) IT	☐
Maintenance Contract Report User	Access Maintenance contract Reports and Exception Reports	1) Customer services 2) IT	☐
Maintenance Contract Data Administrator	UPDATE and maintain Master data (Sirius dealers,dealer type,metapackage, invoice types and schemes) and Maintenance Contract rules , splits ,terms and conditions and K1 schedules	1) Customer services 2) IT	☐
Procurement			
Procurement Administrator	Administrators for Procurement Master Data - Maintenance for Requisition Types - Commodities - Special Buy Items - Procurement Workflow Maintenance - Viewing of Supplier information - View contracts	1) Procurement Team 2) IT	☐
Procurement Document Administrator	Able to maintain Procurement Documents/Framework agreements of suppliers that are linked to the dealership	1) Procurement Team 2) IT	☐
Request for Assistance (RFA)			
RFA Administrator	Administrator for RFA: - Adding of users to approval workflows - Add new assistance types - Brand Maintenance	1) IT Team	☐
RFA Clerk	This will give the user access to view RFA's for all dealers, and the ability to approve RFA requests (if he/she has been added to the approval workflow of the request).	1) CV department 2) IT	☐
RV / Service Contract			
RV/Service Contract Administrator	CREATE and MODIFY RV/Service Contract Model Data and Config Settings (model , body discount, general contract settings)	1) IT Team	☐
RV/Service contract clerk	View all RV / Service contract requests for all dealers.	1) CV department 2) IT	☐

Supply Chain Request			
Supply Chain Administrator	CREATE, MODIFY and VIEW All Supply Chain Details and update Workflows and set the distribution policy	1) Sales team (DT&B) 2) IT	☐
Supply Chain Clerk	CREATE, MODIFY and VIEW Supply Chain Requests for all dealers	1) Sales administrator CV 2) BDM 3) IT	☐
Marketing Request			
Marketing Request Administrator	CREATE, MODIFY and VIEW All Marketing Request Details for all dealerships and update Workflows and assistance types	1) Marketing team 2) Marketing manager CV 3) IT	☐
Marketing Request Clerk	CREATE, MODIFY and VIEW Marketing Requests for all dealers	1) BDM 2) Marketing manager CV 3) IT	☐
Technical Assistance Freightliner/FUSO (TAFF)			
TAFF Administrator	Able to view all taff cases for all dealerships	1) IT (aftersales services)	☐
TAFF DTAC User	Able to action taff cases from all dealerships	1) Freightliner and Fuso DTAC team 2) IT	☐
Sales Transaction System			
Sales Administrator	Able to create , modify and view sales queries and quotes for all dealers, cancel sales queries for all dealers, view fund transactions, view stock dashboard, view sales query forecast, update financial institutions ,agent options , and fleet types	1) BDM 2) Sales admin 3) IT	☐
STS Data Administrator (Vans)	Able to MANAGE STS Data (model discount , vehicle support and funds) for Vans Brand Group for ALL dealers	1) Controlling (vans) Level 5 2) IT	☐
STS Data Administrator (Cars)	Able to MANAGE STS Data (model discount , vehicle support and funds) for Cars Brand Group for ALL dealers	1) Controlling (PC) Level 5 2) IT	☐
STS Controlling Manager (Vans)	Able to APPROVE Model Discount, vehicle support and funds for Vans	1) Controlling (vans) Level 4 2) IT	☐
STS Controlling Manager (Cars)	Able to APPROVE Model Discount for vehicle support and funds Cars	1) Controlling (PC) Level 4 2) IT	☐
SWT Administrator	Able to execute override actions on SWT Interfaces	1) IT Team	☐
Sales Viewer	Able to VIEW Sales Queries AND Quotes for all dealerships	1) Sales team 2) IT	☐
Certified Pre-owned			
Certified Pre-owned Administrator	Able to UPLOAD/MODIFY Certified Pre-owned Images/Media for ALL dealers	1) Fleet department 2) IT	☐
CV Sales Forecast			
CV Sales Administrator	Able to CREATE/VIEW CV Sales Forecast Queries for ALL dealers.	1) Sales manager CV 2) BDM 3) IT	☐
Leads			
Leads Administrator	Able to VIEW Leads for ANY dealership and MAINTAIN Lead Master Data(lead type , lead ques, lead questions) and manually import leads	1) Business process owner for leads 2) IT	☐
Leads Clerk	Able to CAPTURE/VIEW LEADS for ALL dealerships	1) All BDC agents 2) IT	☐
Reports			
Report Administrator	Able to MODIFY Report Links	1) Sales team 2) IT team	☐
Internal Report User	Able to VIEW Internal Report Links	1) Sales team 2) IT	☐
System & Other			
Circular Publisher	Able to CREATE and MODIFY circulars.	1) IT 2) Sales team 3) BDM 4) Controlling Team	☐
CSI Administrator	Able to VIEW CSI Reports for ALL Territories and Dealer Groups	1) IT 2) Sales team 3) BDM	☐

Mercedes Me Report Administrator	Able to access Mercedes Me Reports for ALL Dealers	1) IT 2) Sales team 3) BDM	☐
Manufacturer Certificate Administrator	Able to VIEW and MODIFY Manufacturer Certificate Information (Weight/Natis Model No/Model Description) as well as re-print of Manufacturer Certificates for ALL dealerships	1) Sales admin 2) IT	☐
Internal Dealer Staff Viewer	Able to VIEW staff/user information for ALL dealerships	1) IT 2) BDM 3) Sales Team	☐
Vehicle Security Administrator	Able to VIEW Radio Serial Information for ALL Vehicles	1) Only security team 2) IT	☐
Fleet Registration Clerk	Able to VIEW and APPROVE ALL Fleet Registration Requests	1) Fleet team 2) Sales Team 3) IT	☐
Master Data Administrator	UPDATE and maintain Vehicle Master Data (vehicle types, vehicle groups , swt models and swt dealers)	1) IT 2) Controlling Team	☐
Full Dealer Profile Administrator	Able to CREATE and MODIFY existing staff/users for ANY dealership	1) Helpdesk 2) IT	☐
Systems Administrator	CREATE and MODIFY staff/users, view System and Audit Logs and maintain Configuration Settings	1) Only authorized IT user	☐
Firefighter	Temporary role, required to make critical changes on DLP. Firefighter allows a user access to any function on DLP	1) Requires approval from IT Sales and Marketing manager	☐