CUSTOMER PORTAL OF THE NAGEL-GROUP

This manual provides a concise guide to using the Nagel-Group customer portal.

Click here to access the customer portal.
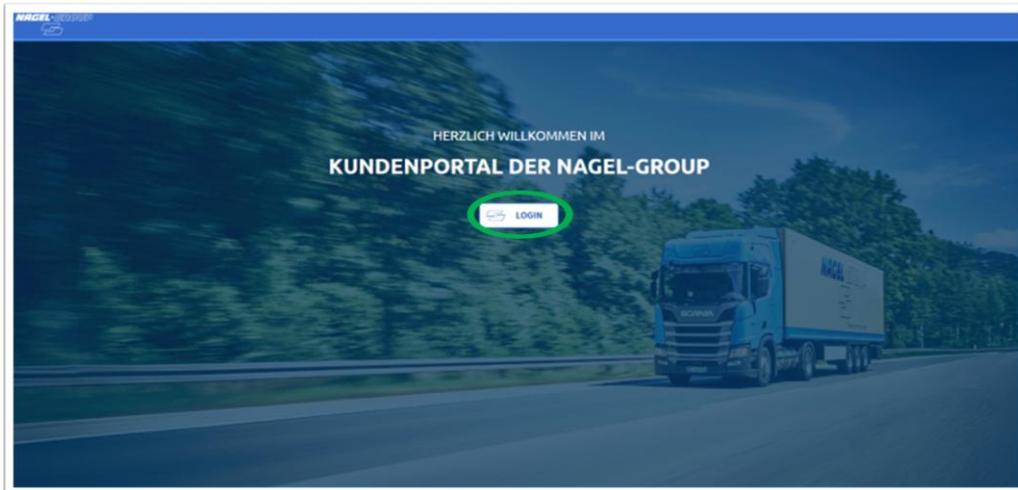
Content

1   Registration

Instructions for logging in to the customer portal.

1.1   Log in

a) **Registration process for customers <u>without</u> their own Microsoft tenant (Microsoft account)**

Enter your e-mail address (personal, business e-mail address, not a collective mailbox)
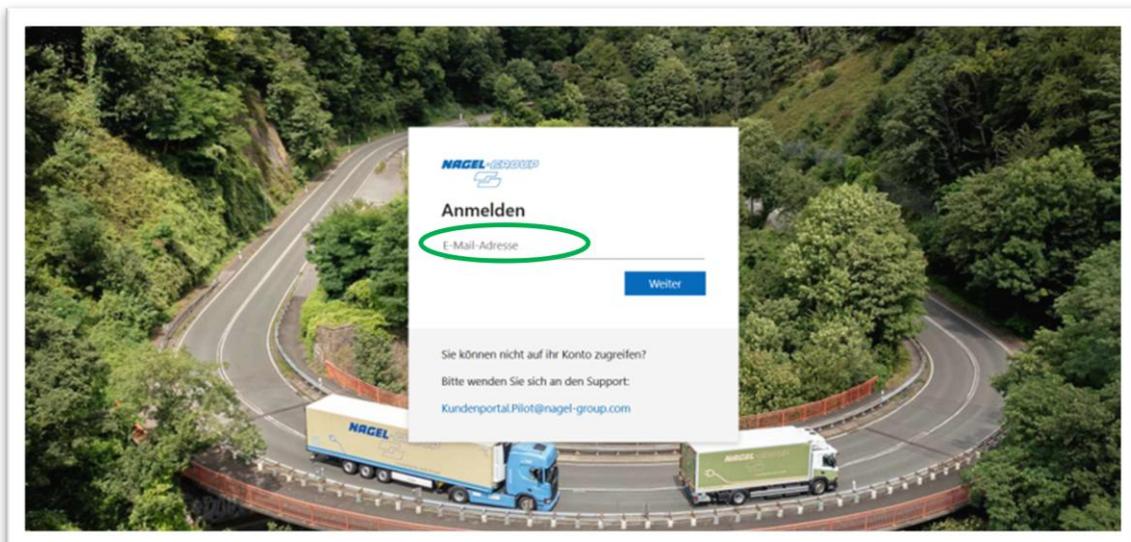
<u>Each time</u> you log in to the customer portal, you will receive a new one-time password, an "account verification code," by email.
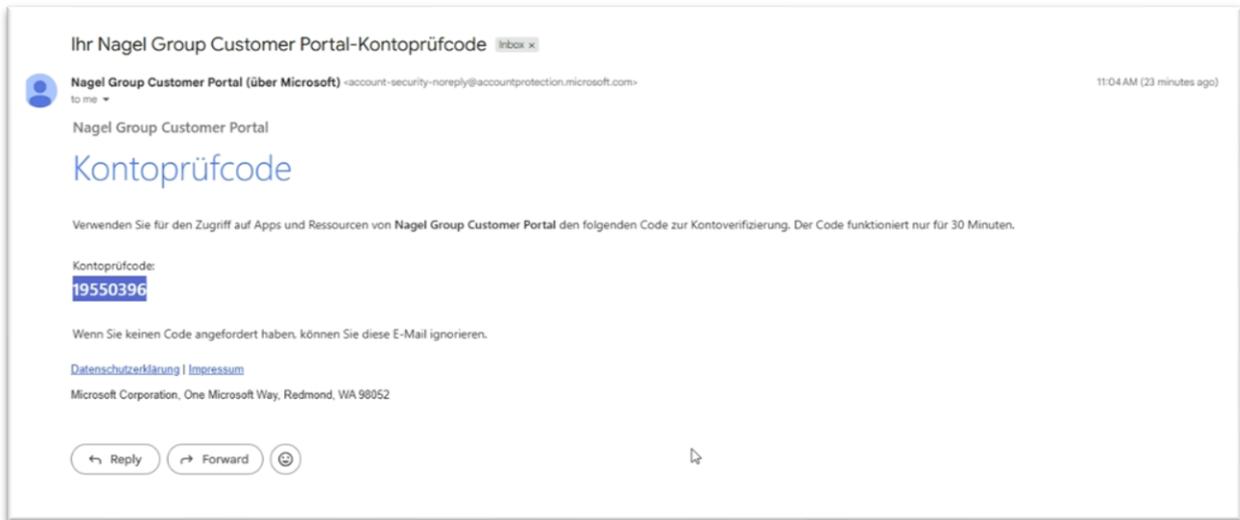
- If you do not receive a password by e-mail, please check the SPAM folder in your e-mail inbox.

Enter code
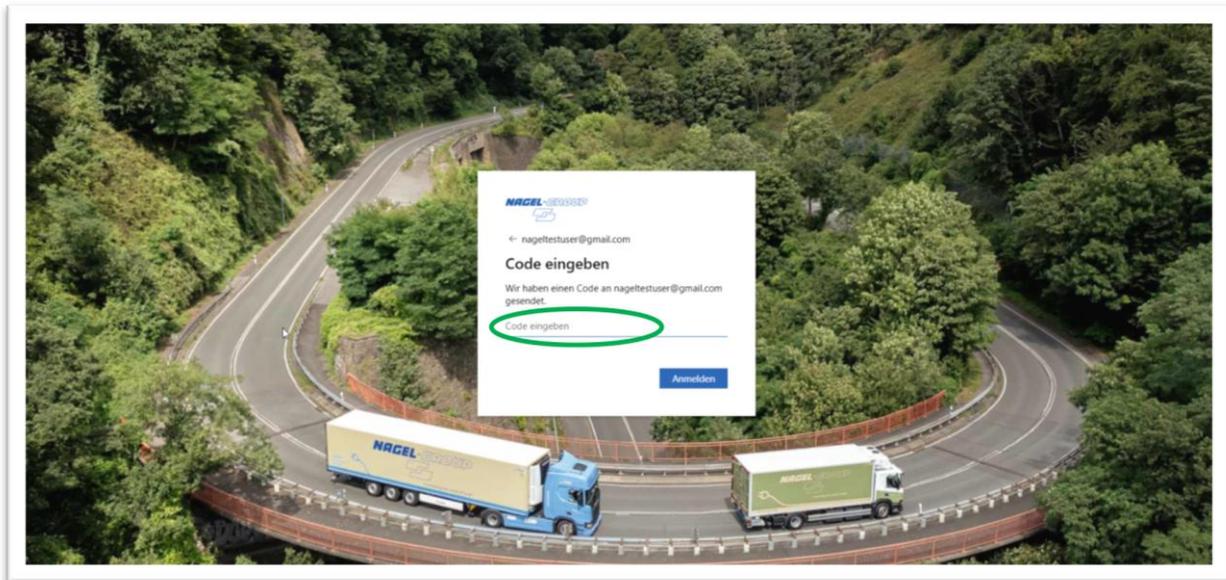
b) Registration process for customers with their own Microsoft tenant (Microsoft account)

If your organization uses a Microsoft tenant (primary account for Microsoft 365 and/or Azure), sign in with the password of the Windows logon.

You may receive a **security prompt**. This query must be accepted once:

1.2 Order Entry / Tracking & Tracing (eLogistics portal)
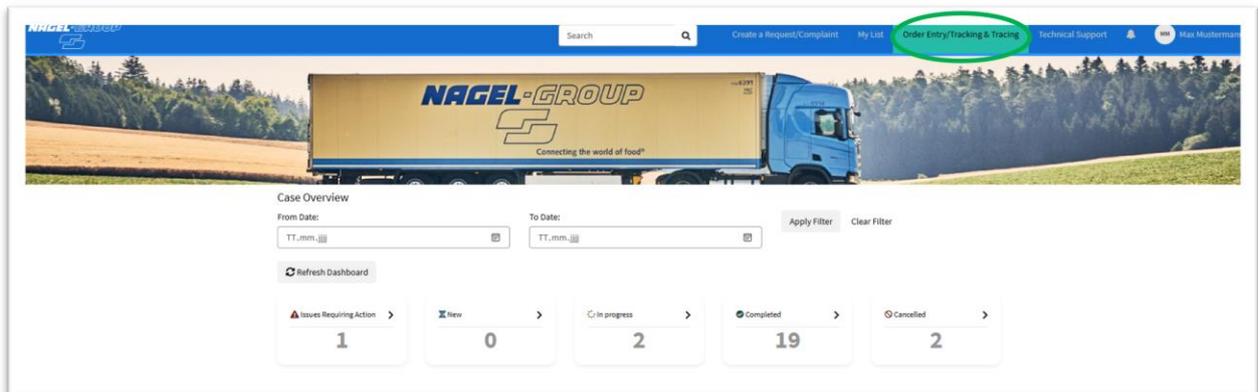
- One-time linking of login data

- The link to T&T (elogistics) must be a 1-to-1 relationship. Each elogistics account can only be linked to one customer portal account.

  If you require additional elogistics accounts, please request these from your local Nagel branch.

2   The Home Page
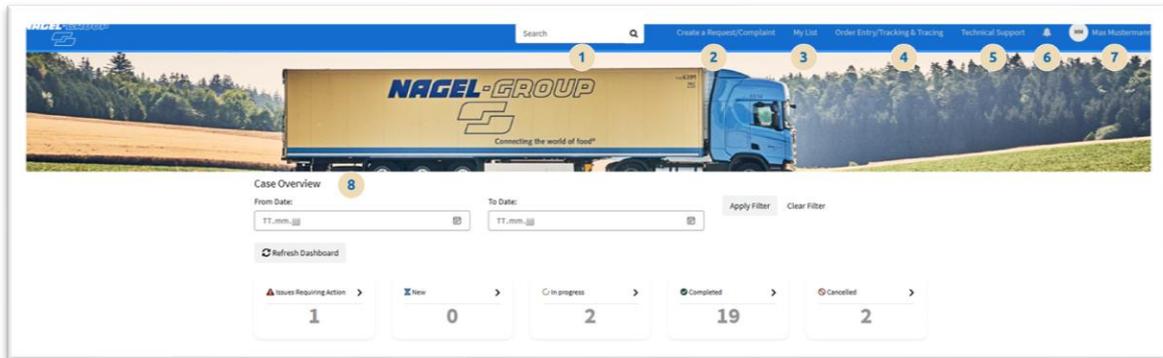
After successful login, the home page will be displayed. It includes a ribbon and a dashboard.

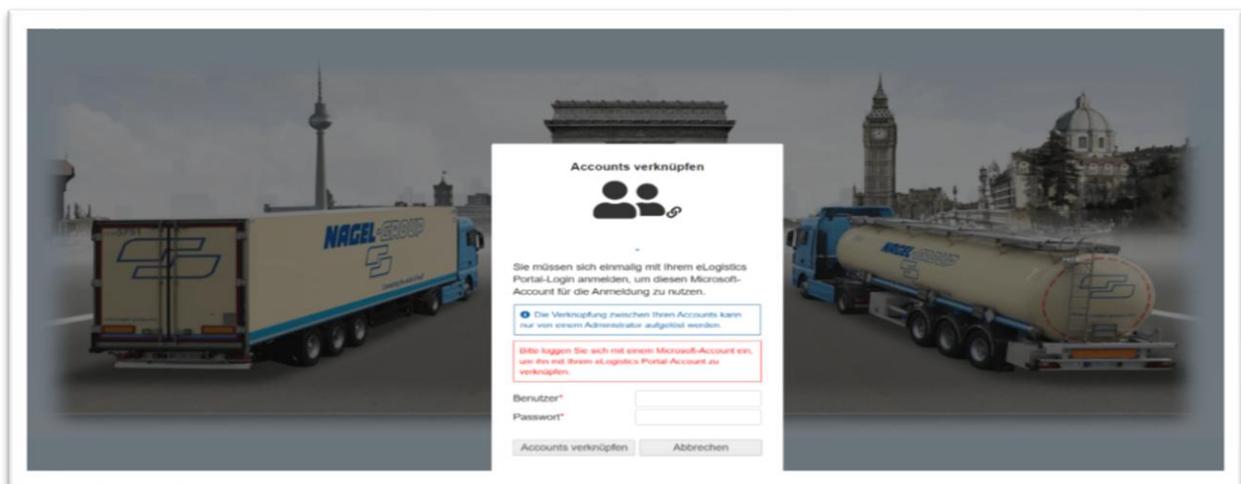- A click on the Nagel-Group logo takes you back to the home page at any time.

2.1   Search

Here you can actively search for cases. To do this, enter the case number and then click on the magnifying glass.

A list of results is displayed.
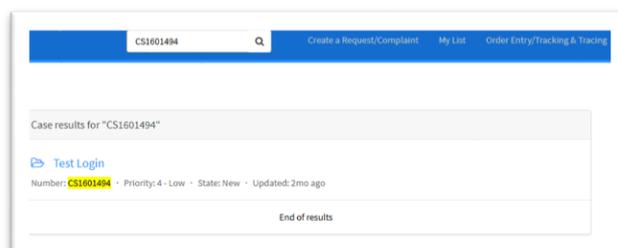
From the list of results, the case can be opened via the title line in blue letters.

You can also search for shipment details or terms from the short description. A search with "*" is possible.

2.2   Create a Request/Complaint

With this menu item you can place requests for Nagel customer service (instead of an email to Nagel customer service).
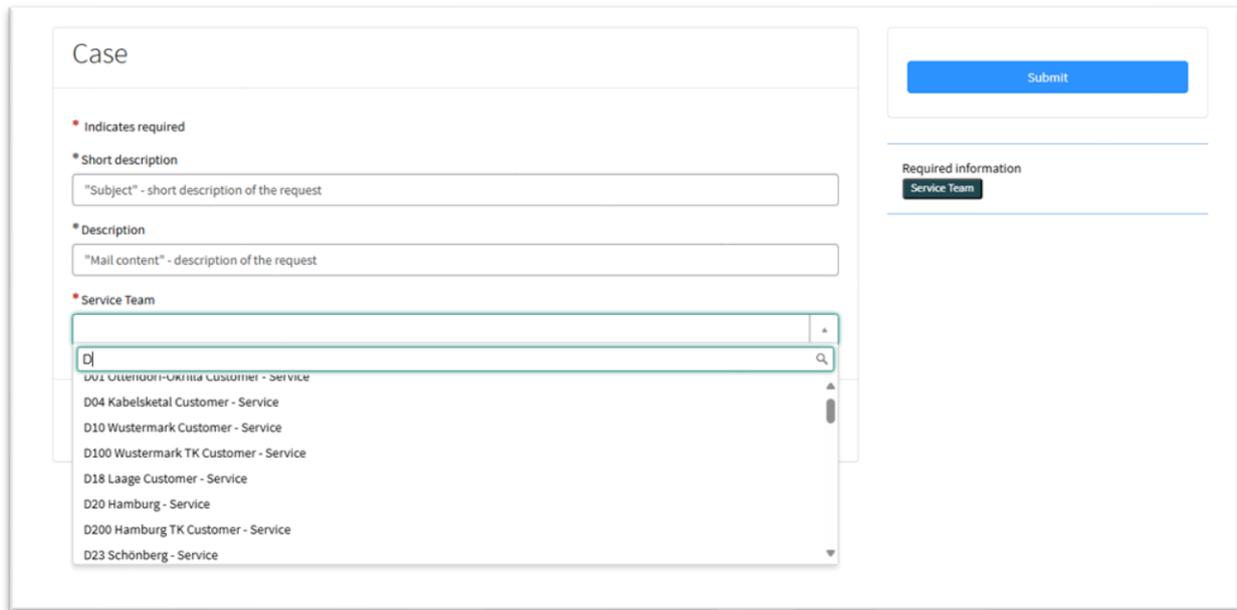

The following fields must be filled in (mandatory information)

- **Short description**: corresponds to the subject of an e-mail
- **Description**: corresponds to the content of an email and should contain a more detailed description of the issue.
- **Service Team**: Here you have to select the Nagel customer service that should receive the request.
- **Add attachments**: Adding attachments is optional.
  Here, documents can be uploaded by selecting or dragging and dropping, which are then also visible to Nagel customer service in the process.
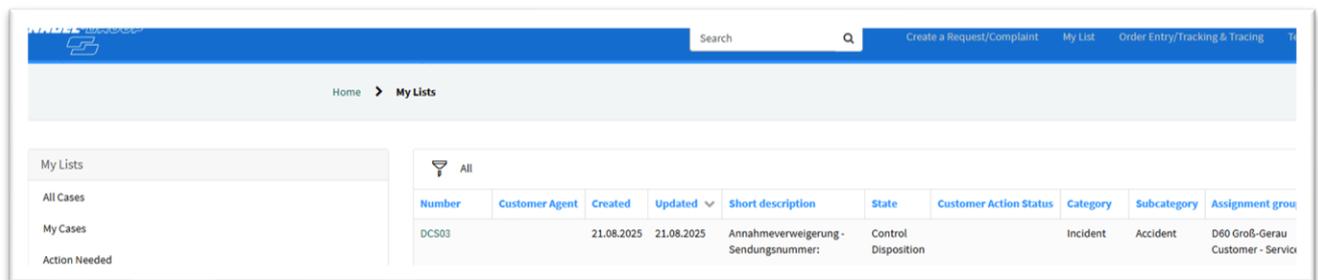
Once the mandatory information has been filled, the "Submit" button creates the process and transmits it to the selected Nagel customer service.

2.3 My Lists

By default, this menu contains the following list views:

- **All cases**: all cases of customer accounts assigned to (the logged in user)
- **My cases**: all cases associated with the logged in user
- **Action needed**: as in the dashboard tile of the same name, here are the cases where customer action is required or an update is required.

All lists can be exported as Excel or CSV files using the "Export list" function. If filters are set, only the filtered results will be exported.

The different columns in the lists:

- **Number** = Number of the case
- **Customer Agent** = employee who performed the last action in the case
- **Created** = Case creation date
- **Updated** = last update in case
- **Short description** = subject line
- **State** = Processing status of the case
- **Customer Action Status** = need for action yes/no
- **Category / Subcategory** = Classification of the case
- **Assignment group** = Service Department Nagel
- **Account** = Customer Account
- **Shipment number, Order number, Delivery note number**
- **Consignor Name, Consignee Name, Consignee City, Consignee ZIP**

2.3.1 Create your own lists

It is possible to create and save your own lists with filters you have chosen yourself.

To create your own list, simply open the filter menu with the filter symbol ("Show filter") and add more filters. In the example, it is the subcategory Accident - to display only the refusals of acceptance.
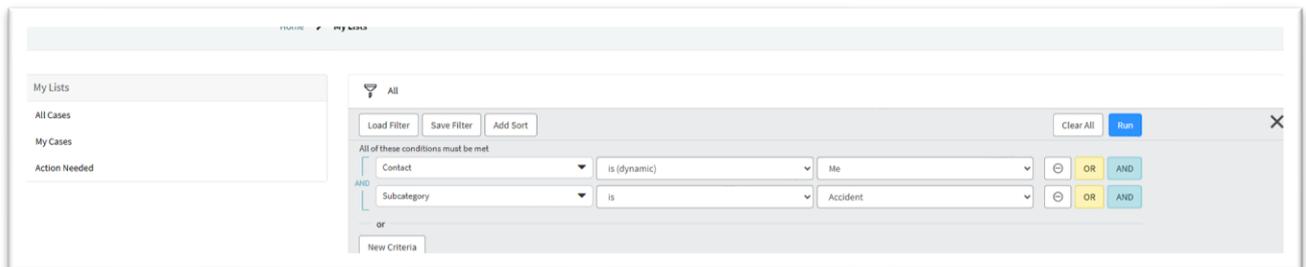
"Run" applies the set filters.

- With "Clear all" the set filters can be deleted again.

Then click on "Save filter" and give it a name.

- Now this list (after reloading the page) also appears in your own lists.

Of course, it also works the other way around: for example, exclude all refusals of acceptance from the list with the filter "is not":
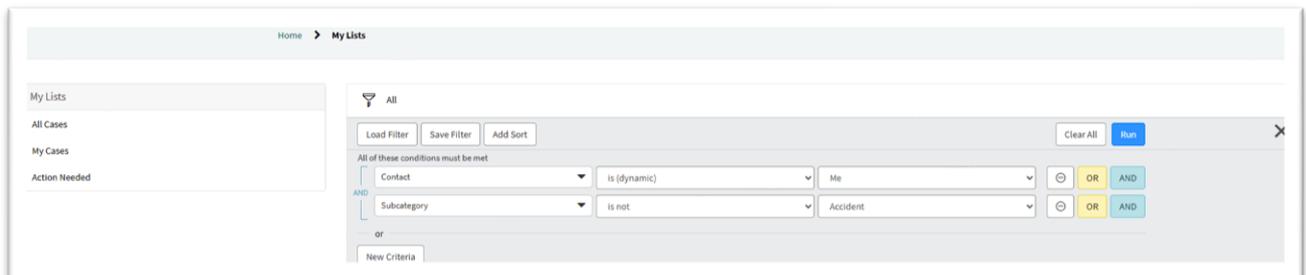
With "Load filter" you can also delete self-generated lists. To do this, click once on the round symbol ⊖ behind the list name and the list will be removed.

2.4 Order Entry/Tracking & Tracing

Below this menu item is the link to the eLogistics portal.

If the user logged in to the customer portal is activated for both portals with the same e-mail address, the user can jump to the eLogistics portal without having to enter a password again. (The direct login to the eLogistics Portal with password, which is independent of the new customer portal, will continue to work as usual.)

➔ See also chapter "Login"

2.5 Technical Support

In case of technical difficulties with the customer portal itself, a ticket can be created under this menu item. This then does not end up in the Nagel customer service, but directly with the IT support of the Nagel-Group.

2.6 Bell

The bell indicates when there are notifications ("Issues Requiring Action") in a case. By clicking on the displayed case number, you jump directly into the case.

Mark all as read empties the list.

The bell is only displayed to the customer contact stored in the case. All other customer employees with portal access will see the notification via the "Issues Requiring Action - tile" on the dashboard or the "Issues Requiring Action" list under "My list".
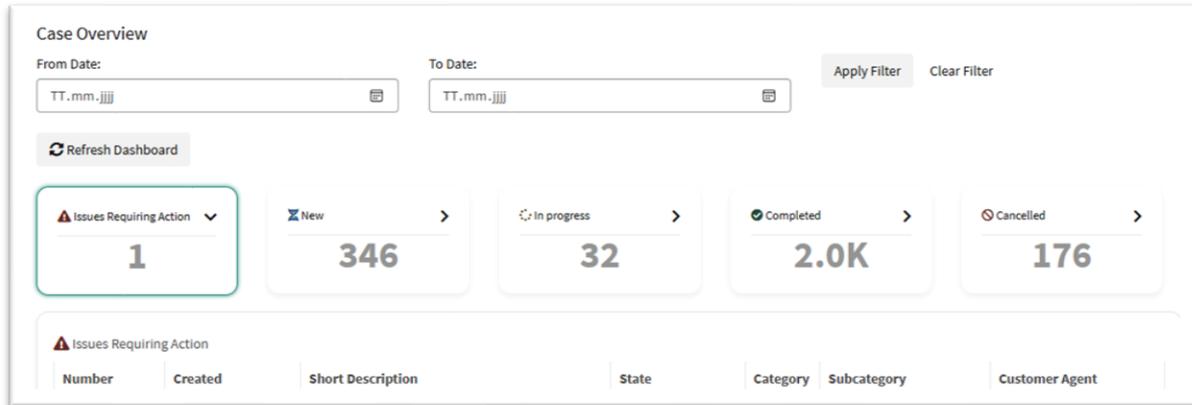

2.7 User profile (here Max Mustermann)

After logging in, the logged in user is displayed here. This also includes the user profile and the logout. In the user profile, for example, the user language can be changed.

2.8 Case overview / dashboard

Here you can filter by date. To do this, click on the calendar icon ⬚ , select the desired date and "Apply filter".

Case Overview

| From Date: | To Date: | Apply Filter | Clear Filter |

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⟳ Refresh Dashboard

| ⚠ Issues Requiring Action ∨ | Σ New ＞ | ⟳ In progress ＞ | ✓ Completed ＞ | ⊘ Cancelled ＞ |
| 1 | 346 | 32 | 2.0K | 176 |

⚠ Issues Requiring Action

| Number | Created | Short Description | State | Category | Subcategory | Customer Agent |

The cases of the logged-in user are displayed in predefined tiles:

- **Issues Requiring Action**:
  - ○ A need for action appears when new information about the process is available or a reaction is required.
    - ▪ Examples of this are delivery note requests or the ordering of refusals of acceptance.
  - ○ If the customer has taken note of an information and no further reaction is required, the need for action can be deleted in the case. To do this, click on the "Action" button to "Remove need for action".
- **New**
- **In progress**
- **Completed**
- **Cancelled**: Cancelled cases can occur when a general or initial CS case is converted by selecting certain categories. In this case, the initial CS case is closed and given a new number.

When you click on a tile, the corresponding list is displayed below the tiles. The displayed cases can be opened with one click anywhere on the line.

⟳ In progress

Number	Created	Short Description	State	Category	Subcategory	Customer Agent
DCS03	21.08.2025	Annahmeverweigerung - Sendungsnummer:	Control Disposition	Incident	Accident	

3 Different types of cases

Depending on the category or subcategory, the cases differ slightly in their view and function. The structure of the view always remains similar.

The type of procedure can be identified by the first letters of the case number (explained in more detail on the following pages).

3.1 Cases view
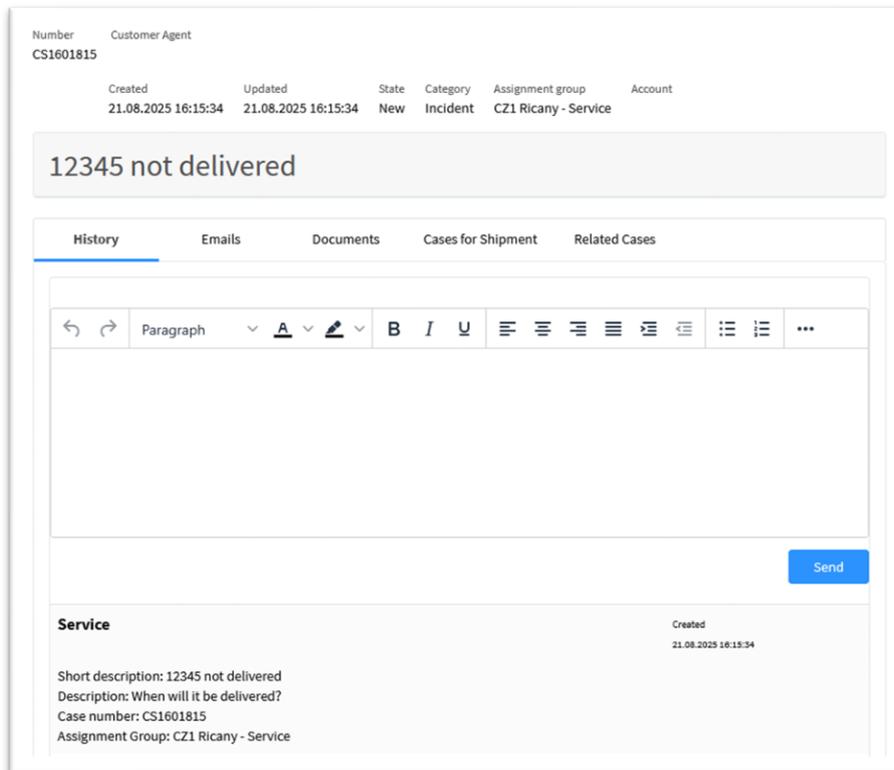
A case can be displayed in several ways

- Via the "Search" with entry of the case number
- From the menu and one of the lists under "My List"
- Via the "bell symbol" and click on the case number displayed there with a need for action
- By clicking on a "dashboard tile" and then selecting it from the list view (below the tiles).

Cases can be assigned to other employees of the same account within the customer portal via "Actions."
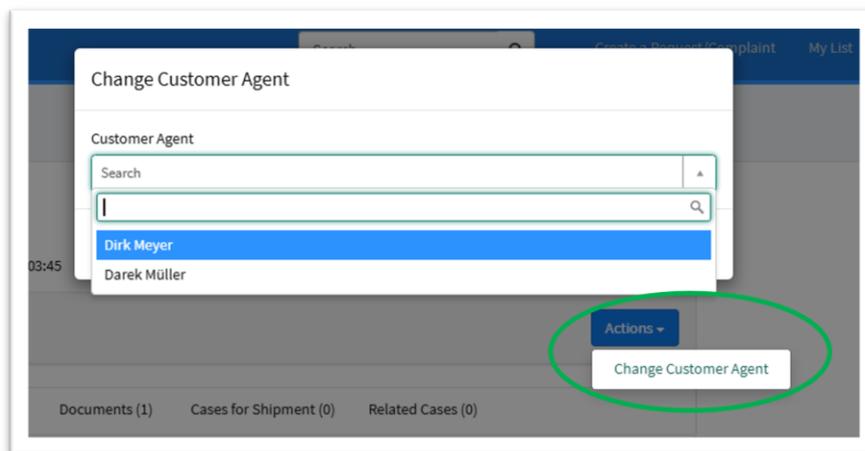
The employee concerned will be notified of this via a notification in the bell icon.

3.2 CS = Initial or general case

In the upper area you will find the most important data on the case:

- **Number** = Case Number
- **Created** = Case creation date
- **Updated** = Timestamp of the last action in the case (customer or Nagel-side)
- **State** = Status of the case
- **Category or subcategory** = classification of the case into predefined categories by Nagel customer service
- **Assignment group** = the service department of the displayed/selected branch
- **Account** = the customer account from the case

Below is a line with the title (short description) from the case

- Below are various tabs:
  - **History** shows previous activity in the case
  - **Emails** displays (if any) all emails in the case
  - **Documents** displays all documents uploaded in the case or emailed to the case
  - **Cases for Shipment** displays (if available) other cases for the same shipment as in the operation (if the transaction has been assigned to a shipment)
  - **Related Cases** (if any) displays other cases related to the task. Related cases can arise when a general CS case is converted by selecting certain categories. The initial CS is closed and gets a new number.

- Depending on the case type, additional tabs may be added:
  - **Disposition** – in the event of refusals of acceptance
  - **Proposed solution** – when a proposed solution has been submitted by Nagel customer service
  - **Damaged consignments** – in the event of an accident

- Below this is an editor field where comments (instead of an email) on this process can be entered and sent to Nagel customer service.

- Below the editor, the previous actions in the case are displayed.

3.2.1 Proposed solution as a special feature

Nagel can send a proposed solution to the customer for confirmation before a case can be closed and not processed further. To do this, the Nagel customer service enters its answer into the process and asks for confirmation from the customer.

- A need for action appears in the customer portal and the "Action" button appears in the process
- If there is a proposed solution, there are 2 possibilities:
  - accept it via "Action" and "Accept Solution" (case is closed)
  - or with a reason the "reject solution" (case remains open "In progress")

3.3 DCS = Refusal to accept
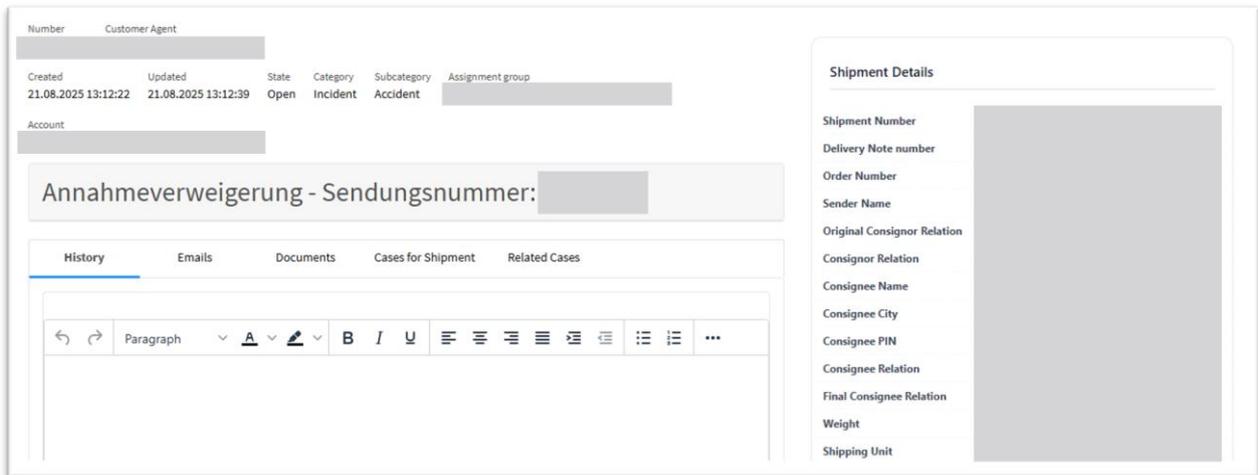
- As in the CS case, in the DCS case, the most important data about the accident process can be seen in the upper area. On the right side of the screen you can see the "Shipment Details".

  Under the title line (= "Short description") there is further information on the refusal of acceptance, depending on the status of the case: "refusal to acceptance- remark" = reason of the refusal of acceptance, "Disposition", "Special disposition instructions" (from the dispostion), "Cost Bearer" of the order.

3.3.1 Disposition as a special feature in the DCS case
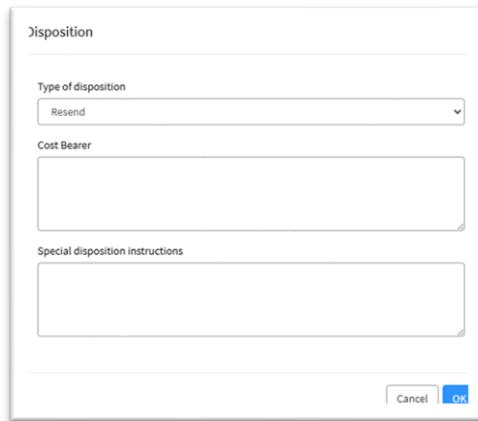
- - The Actions and Disposition button can be used to make the dispatch order of refusal of acceptance
- - A pop-up window will open with the entries
  - o Type of disposition
  - o Cost Bearer (of the disposition)
  - o Special disposition instructions

Depending on the type of dispostion, there is also a field labeled "alternative address," to enter the new address where the goods should be returned or delivered.
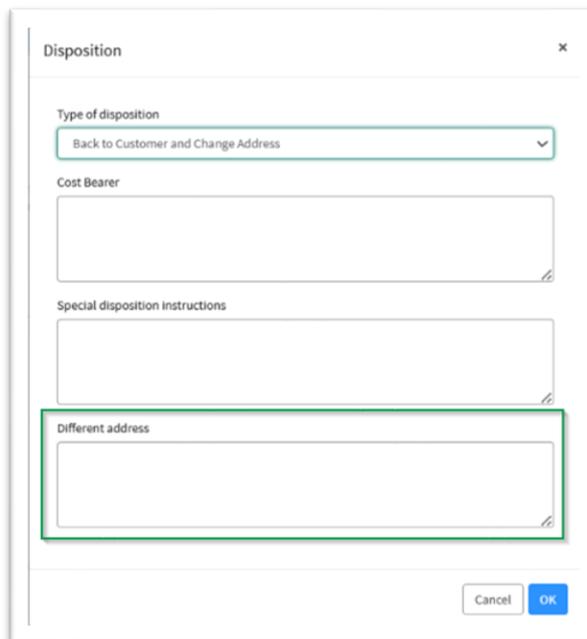
3.4   HVRCS = Average Case

- Category Average
- Function analogous to DCS (refusal of acceptance)

3.5   COMCS = Complaint Case

- Category Customer Complaints
- Function analogous to CS

3.6   MP8CS = Delivery Difference Case

- Category Delivery Difference
- Function analogous to CS

3.7   DNCS = Delivery Note Request Case

- Category Delivery note
- Function analogous to CS

In further development steps, other case types can be added.