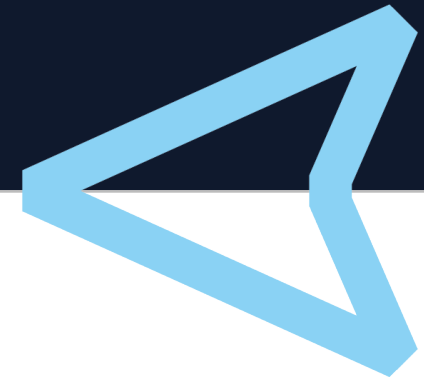


How to create a new quote



HOW TO CREATE A NEW QUOTE

showroom.navigate.autoprotect.co.uk/agreements

NAVIGATE
Powered by AutoProtect

CUSTOMERS AGREEMENTS REPORTS HELP PRODUCT INFO

Maxi Motors(Obligor) Navigate Support

Customer Support: 01279 456605

Dashboards

All agreements

All Agreements (387) Policy status filter

Customer	Agreement Number	Status	VRN	VIN	Sales Person	Last Updated
Fred Test	18642664	Active	AV17 DWD	WDD2132042A170307	Fred Saleh	13-09-2022
ADAM TEST	18640871	Active	EX67 NEO	SJAAE14V1JC020048	Navigate Support	12-09-2022
Fred Test	18627103	Cancelled	AV17 DWD	WDD2132042A170307	Fred Saleh	07-09-2022
Test Fred	18619316	Partial Quote	AV17 DWD	WDD2132042A170307	Fred Saleh	05-09-2022
Andrey Semikov	18608527	Active	DX68 YWV	KMHK2811LKU209196	Navigate Support	01-09-2022
Adam Head	-	Partial Quote	-	-	Navigate Support	01-09-2022
TestTestTest TestTestTest	-	Partial Quote	BK55 YTP	VF32CRFKA44202979	Navigate Support	30-08-2022
Test Testipt	18599724	Partial Quote	AV17 DWD	WDD2132042A170307	Fred Saleh	30-08-2022
Test Test	18588478	Partial Quote	BK55 YTP	VF32CRFKA44202979	Navigate Support	25-08-2022
Adam Head	18588361	Active	YF19 HUV	WBA7V62030BP58576	Navigate Support	25-08-2022

Rows per page: 10 1-10 of 387

v.2.14.0

Click New quote button and follow privacy notice instructions.

+ NEW QUOTE

PRIVACY NOTICE

showroom.navigate.autoprotect.co.uk/agreements/edit/12e73ca1-16f0-41a2-b6d2-9b61c0947654/customer-information

Partial Quote

1 Add Customer Information 2 Add Vehicle Information 3 Add Purchase Information 4 Add Products & Services 5 Review & Activate

Customer Support: 01279 456605

New Customer

Agreement Number

Sales Person

Assigned to:

Customer Information

Enter your customer's information.

Select the policy holder type

PERSON ORGANISATION

Indicates Required Information

Customer Name

Title * Forename * Surname *

Customer Address

Enter Your Postcode

Postcode *

Find Address

> Enter Address Manually

DATA PRIVACY NOTICE FOR THE CUSTOMER

We will share your information with AutoProtect Group in order to follow and evidence regulatory process and/or to process products and services supplied by AutoProtect Group.

For more details of the ways in which your information is used by AutoProtect Group please read the [Data Privacy Notice](#) provided.

DECLINE **CUSTOMER CONFIRMS**

The privacy notice can be viewed by selecting the link. When the customer agrees with the privacy notice click customer confirms

NEXT STEP

ENTER CUSTOMER DETAILS

showroom.navigate.autoprotect.co.uk/agreements/edit/12e73ca1-16f0-41a2-b6d2-9b61c0947654/customer-information

Partial Quote | 1 Add Customer Information | 2 Add Vehicle Information | 3 Add Purchase Information | 4 Add Products & Services | 5 Review & Activate

Customer Support: 01279 456605

New Customer

Agreement Number:
Sales Person:
Assigned to:

Customer Information

Enter your customer's information.

Select the policy holder type

PERSON ORGANISATION

* Indicates Required Information

Customer Name

Title * Forename * Surname *

Customer Address

Enter Your Postcode

Postcode *

FIND ADDRESS

> Enter Address Manually

NEXT STEP

Enter customer details to complete form, enter post code then click find address – alternatively click to enter address manually. Complete all the boxes.

* Denotes a mandatory field

ENTER CUSTOMER DETAILS

showroom.navigate.autoprotect.co.uk/agreements/edit/12e73ca1-16f0-41a2-b6d2-9b61c0947654/customer-information

Partial Quote

1 Add Customer Information 2 Add Vehicle Information 3 Add Purchase Information 4 Add Products & Services 5 Review & Activate

Customer Support: 01279 456605

Customer Address

Enter Your Postcode

Postcode *

CM19 5DY

FIND ADDRESS

> Enter Address Manually

Contact Details

Primary Contact Number *

Mobile

+ ADD ANOTHER

Email Address *

How does the customer plan to use the vehicle? ⓘ

Vehicle Use *

NEXT STEP

include mobile number in primary contact details. Click add another to enter more phone numbers.

Enter an active email address for the customer, the email address will be used to deliver the agreement documents to the customer. This will reduce paper use and ensure the customer has a copy of the agreement in their inbox.

Enter the customer intended use for the vehicle: **Caution!** this selection will determine which products (that you have available at your dealership) are available as eligible for the customer, when you arrive at the products and services screen.

ENTER VEHICLE REGISTRATION & DETAILS

showroom.navigate.autoprotect.co.uk/agreements/edit/a0e43d56-30a0-4b17-b030-6e0ffe6e1898/vehicle-information

Partial Quote

1 Add Customer Information 2 Add Vehicle Information 3 Add Purchase Information 4 Add Products & Services 5 Review & Activate

Customer Support: 01279 456605

Fred Test
Agreement Number: 18559937

Sales Person: Navigate Support

Assigned to: Navigate Support

Vehicle Information

Enter your customer's vehicle information.

* Indicates Required Information

The vehicle status? *

NEW USED

Enter the registration number of the vehicle *

UK AV17 DWD

FIND VEHICLE TROUBLE FINDING THE VEHICLE

MERCEDES-BENZ E CLASS DIESEL ESTATE E220d SE 5dr 9G-Tronic
2017, 2000cc, Automatic, Diesel

Edit Vehicle

VIN:	WDD2132042A170307	Registered On:	31/03/2017
Make:	MERCEDES-BENZ	Fuel:	Diesel
Model:	E CLASS DIESEL ESTATE	Engine Size:	2000cc
Style:	E220d SE 5dr 9G-Tronic	Year of Manufacture:	2017
Transmission:	Automatic	Glass's Code:	255064, Family: 001

PREVIOUS STEP NEXT STEP

Enter the vehicle registration number and click find vehicle, the vehicle results will display.

Scroll down the page completing all the additional vehicle information, mileage, delivery date etc.

- * Denotes a mandatory field

REGISTRATION NOT AVAILABLE

showroom.navigate.autoprotect.co.uk/agreements/edit/23d62e30-40d1-4f2b-8c04-497c1375f7d6/vehicle-information

Partial Quote

1 Add Customer Information 2 Add Vehicle Information 3 Add Purchase Information 4 Add Products & Services 5 Review & Activate

Customer Support: 01279 456605

Fred Test

Agreement Number: 18559937

Sales Person: Navigate Support

Assigned to: Navigate Support

Vehicle Information

Enter your customer's vehicle information.

* Indicates Required Information

The vehicle status? *

Enter the vehicle information

* Indicates Required Information

Enter the vehicle registration number

VRN

Enter the vehicle identification number

VIN

Check the vehicle type? *

PREVIOUS STEP NEXT STEP

If the registration number is unavailable, select new and enter the make, model & style to build the vehicle then scroll down the page completing all the additional vehicle information, mileage, delivery date etc.

* Denotes a mandatory field

VEHICLE DETAILS

showroom.navigate.autoprotect.co.uk/agreements/edit/a0e43d56-30a0-4b17-b030-6e0ffe6e1898/vehicle-information

Partial Quote

1 Add Customer Information 2 Add Vehicle Information 3 Add Purchase Information 4 Add Products & Services 5 Review & Activate

Customer Support: 01279 456605

Additional Vehicle Information

* Indicates Required Information

Is the vehicle UK specification? *

YES NO

Mileage *
11,211

Vehicle Purchase Date *
13/09/2022

Manufacturers Warranty Expires Date

MOT Due Date

Delivery Date

Stock Number

PREVIOUS STEP NEXT STEP

Caution!

Entering inaccurate vehicle details may impact what eligible products are available on the products & services screen

ENTER VEHICLE PRICE

showroom.navigate.autoprotect.co.uk/agreements/edit/a0e43d56-30a0-4b17-b030-6e0ffe6e1898/purchase-information

Partial Quote | 1 Add Customer Information | 2 Add Vehicle Information | 3 Add Purchase Information | 4 Add Products & Services | 5 Review & Activate

Customer Support: 01279 456605

Fred Test
Agreement Number: 18599937

Sales Person: Navigate Support

Assigned to: Navigate Support

Purchase Information

Enter your customer's purchase information.

* Indicates Required Information

Vehicle Price (Gross) *
£11,211

Caution!
Entering the retail price incorrectly may result in expected products not being available as eligible on the product screen

PREVIOUS STEP | NEXT STEP