



# ARVAL WEB PARTNERS GUIDE



**ARVAL**  
BNP PARIBAS GROUP

For the many journeys in life

# Table of Contents

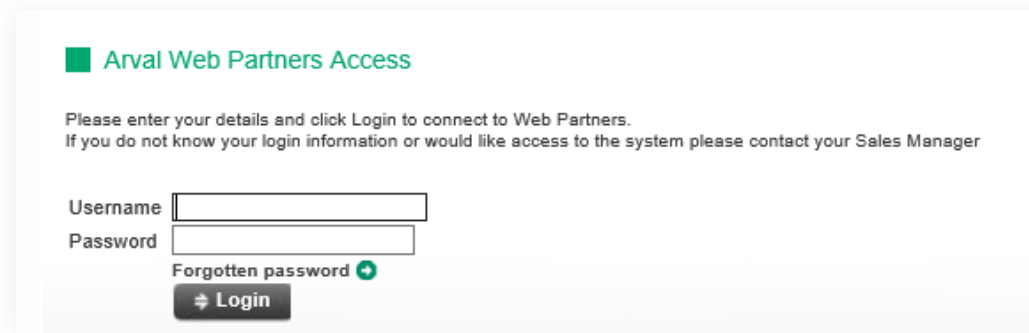
- 1.1 Login Details
- 1.2 How to escalate an IT issue
- 1.3 Welcome Page
- 2. Homepage
- 3. Quotations
  - 3.1 Quotation Validity
  - 3.2 Credit Validity
  - 3.3 Single Vehicle Quote
  - 3.4 Multi Vehicle Quote
  - 3.5 Quotation Summary
  - 3.6 CO2/RFL/WLTP/NEDC/API
  - 3.7 Prestige/Exotic Vehicle
  - 3.8 Used Vehicle Quote
  - 3.9 Conversion Quote
  - 3.10 Government Grant Vehicle
- 4. Credit Proposals
  - 4.1 Attaching Documents at point of prop
  - 4.2 Vehicle OTR over £45,000
  - 4.3 Business Customers
  - 4.4 Regulated Customers
  - 4.5 Individual Proposals (Personal Contract Hire)
- 5. Credit Decisions and Messages
- 6. Raising Documents for Orders
  - 6.1 Sent & Signed Reporting
  - 6.2 Going Manual / Failed IDV
- 7. Live Vehicles and In Life Activities
  - 7.1 Searching for Vehicles
  - 7.2 Raising an In Life Activity
- 8. Management Reporting

# 1. LOG IN AND WELCOME

## 1.1 LOGIN DETAILS

To access Arval Web Partners, enter the following URL into your Internet Browser.  
**https://webpartners.arval.co.uk**

Complete your username and password (case sensitive) and click '**Login**'.



The screenshot shows the 'Arval Web Partners Access' login page. It features a title 'Arval Web Partners Access' with a green square icon. Below the title, there is a message: 'Please enter your details and click Login to connect to Web Partners. If you do not know your login information or would like access to the system please contact your Sales Manager'. The form includes two input fields: 'Username' and 'Password'. Below the 'Password' field, there is a link for 'Forgotten password' with a plus icon. At the bottom of the form is a 'Login' button with a right-pointing arrow.

If you forget your password, click on the Forgotten Password icon. Enter your username and email address, then choose and confirm a new password. Your password will expire every 30 days for security purposes.

If there is no browser activity for more than 30 minutes, the connection will time out. By entering your username and password, you will return to your original page.

## 1.2 HOW TO ESCALATE AN IT ISSUE

If you experience any system issues, contact your Arval Support Team or Sales Manager.

## 1.3 WELCOME PAGE

This is your Welcome Page. From here you can access our **eLibrary** or enter the Arval quotation pages. Click '**Continue to Arval Web Partners**' to produce a quotation.

### Welcome to Arval Web Partners

Arval is the leading fleet and fuel management company in the UK and we are committed to maximising support to our partners. We want to make it as easy as possible for you to service your customers when selling our products and services and have developed the Web Partners tool to enable you to manage your quotations and reporting online. You can also access full details of our latest products to enable you to keep your customers informed.

Arval has collaborated with a growing network of partners since 2003. Supported by a committed team of specialists, each partner benefits from both a dedicated field based sales manager and their individual internal sales executive, ensuring continuity and well-informed support.

[Continue to Arval Web Partners >>>](#)



#### The Download Zone

Brochures and documents to support customer acquisition and retention



[FIND OUT MORE](#)

#### eLibrary

Visit the Arval library for information on our products, policies and processes



[LATEST PRODUCTS](#)

#### Management Reporting

Choose from a suite of management reports



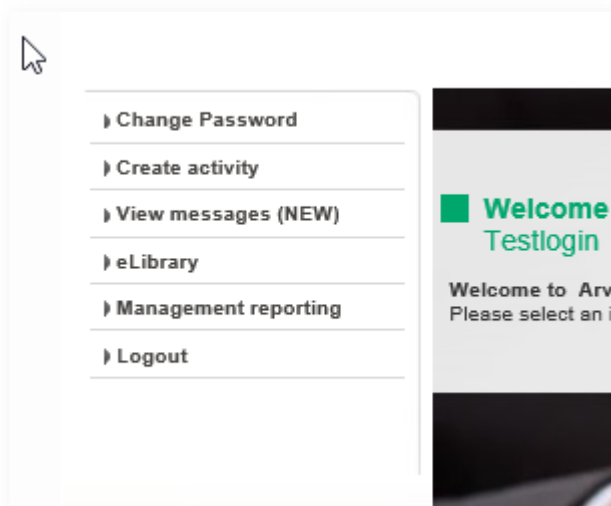
[FIND OUT MORE](#)

**eLibrary** - contains all the process and training information you require for Arval Web Partners.

**Management Reporting** – Select to choose from a suite of management reports. These will be emailed to you as Microsoft Excel data extracts.

## 2. HOMEPAGE

From the **Home** tab, you can select a function via the left hand menu, or by using the menu bar.



**Change Password** – Select the Change Password tab to change your password. Enter and confirm your password change.

**View Messages** – Select View Messages to view any messages from Arval. When a new message is received, the tab will show as NEW.

PRC Status COMPLETED	14968900/3		
Customer Name: heather hopkins Company Code: HO5404 Credit Conditions: 1+47 Quote: 14968900/3 Reason: New application			

Hover over to see the decision.

The tooltip displays the following decision details:

- Customer Name: heather hopkins
- Company Code: HO5404
- Credit Conditions: 1+47
- Quote: 14968900/3
- Reason: New application
- Limit Requested: 27125.23
- Approved Limit: 27125
- Decision Desc: Approved as proposed
- Decision Reason: N/A
- Decision Payment Method: Direct Debit
- Decision Billing Freq: Monthly
- Min Month Duration: 48

The summary table for Customer: heather hopkins is as follows:

Limit	27125.00 GBP
Utilised	0.00 GBP
Pending	23339.36 GBP
Available	3785.64 GBP
Conditions	1+47
Vehicles	0

Click on the quote number to be taken to the quote itself where you will see credit has been loaded.

## 3. QUOTATIONS

### 3.1 CREDIT VALIDITY

You have three months from when a customer is propped/credit increase to:

- Get credit loaded.
- Request docs on the system.
- Get docs signed by the customer.

Failure to complete the above within three months means the customer will need to be re proposed, resulting in searches being carried out again on the customer.

### 3.2 QUOTE VALIDITY

Quotes also have expiry dates. The majority of quotes have a 28-day validity (you can see the validity date when running the quote) you have until the expiry date of the quote to:

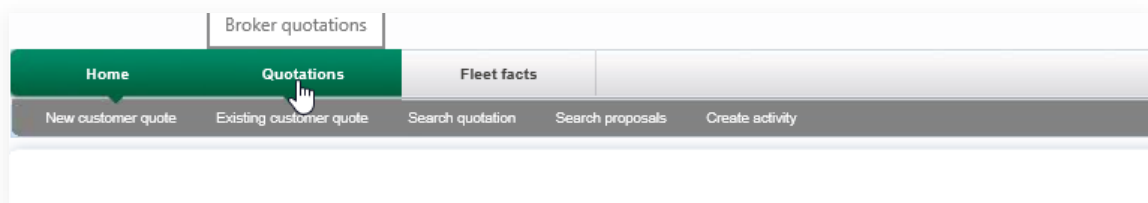
- Get credit loaded
- Request docs on the system
- Get docs signed by the customer

Failure to complete the above within the quote validity would result in you re quoting. Please note Arval will not quote match on expired quotes where we have no Arval signed order in place.

#### What if my quote validity is less than 28 days?

Providing the dealer is honouring the discount and OTR we will allow you an additional 7 days to get credit approval, docs sent and signed. This only applies where you have this short expiry of less than a week and not to all quotes.

Click on the **'Quotations'** tab at the top of the screen.



## 3.3 SINGLE VEHICLE QUOTE

On the quotation page you can quote for both new and existing customers.

Select '**New Customer Quote**'.

Choose the product you wish to quote on from the Contract Profile dropdown box.

**Contract details**

Contract details

Contract profile

Default profile

Initial payment/deposit

Advance rentals

Term

Annual mileage

Contract mileage

Frequency

Profile

Followed by payments

Length of pause

Salesperson

Sales code

⇒ Select vehicle

The Contract Profiles available will be:

- Contract Hire (Limited Business) New ATC/Used & New/Campaigns
- Regulated Contract Hire (Non-Limited Business) New ATC/Used & New/Campaigns
- PCH (individual) New ATC/Used & New/Campaigns

The default payment profile will be prepopulated. This payment profile will be a 36 month contract with 3 monthly rentals in advance, followed by 35 monthly payments, with an annual mileage of 10,000 including guaranteed maintenance.

**Contract details**

Contract details

Contract profile	WP Contract Hire New
Default profile	Web Partners Quotation
Initial payment/deposit	0
Advance rentals	3
Term	36
Annual mileage	10000
Contract mileage	30000
Frequency	Monthly
Profile	Spread
Followed by payments	35
Length of pause	1
Salesperson	Testlogin
Sales code	0

[Select vehicle](#)

On this page, the following fields can be amended if required:

- Initial Deposit (the amount entered should be net of VAT for both BCH and PCH).
  - Please note if adding a deposit amount do not change the Profile dropdown. The system will automatically calculate the deposit at Quotation Summary stage.
- Advance Rentals (note that either an Initial Deposit or Advance Rentals can be chosen, not both).
- Terms.
- Frequency.
- Profile.
- Annual Mileage.
- Contract Mileage - the maximum contract mileage for all vehicles is 150,000.
- Sales Code = Commission.
- Contract Hire and Regulated Contract Hire will display rentals excluding VAT.



Personal Contract Hire will display rentals including VAT.

Then press '**Select Vehicle**'.

**Select vehicle**

Please select vehicle.

Vehicle Catalogue  **Search for cap**

- ABARTH
- ALFA ROMEO
- ALPINE
- ANCILLARY
- AUDI**
- BMW

- A1 SPORTBACK (2018)
- A1 SPORTBACK SPECIAL EDITIONS (2018)
- A3 CABRIOLET (2018)**
- A3 DIESEL SALOON (2020)
- A3 DIESEL SPORTBACK (2020)
- A3 SALOON (2020)

- 35 TFSI S Line 2dr
- 35 TFSI S Line 2dr S Tronic
- 35 TFSI S Line 2dr S Tronic [Tech Pack]
- 35 TFSI S Line 2dr [Tech Pack]**
- 35 TFSI Sport 2dr
- 35 TFSI Sport 2dr S Tronic

List price	27650.00 GBP
Model year	2019
NEDC Co2 emissions	129 g/Km
WLTP Co2 emissions combined	999
WLTP MPG Combined	40.9
Electric Cons	
Electric Range	
RDE Cert Level	

**Multi vehicle search**

**Select options** **Quotation summary**

On this page you can either enter the Cap Code of a vehicle, or choose a Model and Derivative.

Then press '**Select Options**'.

Dealer fitted extras can be added to the quotation at this stage. Enter the description and the costs (excluding VAT) and then press '**Add**'.

Factory options are grouped together alphabetically, and will expand when selected.

Factory options			
Category	Select options	Price	Rental
Chassis/Suspension			
Driver Aids			
Driving Mirrors			
Entertainment			
Exterior Body Features			
Exterior Lights			
Heating/Cooling/Ventilation			
Hoods			
Interior Features			
Packs			
<b>Paint - Metallic</b>	<input type="checkbox"/> Metallic paint 479.17 <input type="checkbox"/> Metallic - Nano grey 479.17 <input type="checkbox"/> Metallic - Mythos black 479.17 <input type="checkbox"/> Metallic - Floret silver 479.17 <input checked="" type="checkbox"/> Metallic - Monsoon grey 479.17 <input type="checkbox"/> Metallic - Glacier white 479.17 <input type="checkbox"/> Metallic - Tango red 479.17 <input type="checkbox"/> Metallic - Cosmos blue 479.17		
Paint - Pearlescent	<input type="checkbox"/> Pearlescent paint 479.17 <input type="checkbox"/> Pearl - Daytona grey 479.17		
Paint - Solid			
Paint - Special			
Safety			
Seats			
Security			
Telematics			

You can hover over an option to see the full description.

Security			
Telematics			
Trim - Cloth			
Trim - Leather	<div style="border: 1px solid black; padding: 5px; display: inline-block;">           Windsor leather - Ebony, Ebony/Ebony colourway, Ebony Morzine headlining + sport seats         </div>		0.00
	<input type="checkbox"/> Windsor leather - Ebony, Ebony/Ebony colourway, Li		0.00
	<input type="checkbox"/> Windsor leather - Ebony, Ebony/Ebony colourway, Eb		0.00
	<input type="checkbox"/> Windsor leather - Light Oyster, Ebony/Light Oyster		0.00
	<input type="checkbox"/> Windsor leather - Light Oyster, Ebony/Light Oyster		0.00
	<input type="checkbox"/> Windsor leather - Light Oyster, Ebony/Light Oyster		0.00
	<input type="checkbox"/> Windsor leather - Light Oyster, Ebony/Light Oyster		0.00
	<input type="checkbox"/> Windsor leather - Light Oyster, Ebony/Light Oyster		0.00
	<input type="checkbox"/> Windsor leather - Mars Red, Ebony/Ebony colourway,		0.00
	<input type="checkbox"/> Windsor leather - Mars Red, Ebony/Ebony colourway,		0.00
	<input type="checkbox"/> Windsor leather - Mars Red, Ebony/Ebony colourway,		0.00

**The paint finish is a mandatory requirement.**

If a chosen extra is dependent upon another extra being added, you will receive a message reminding you to include it.

Once all your extras have been added, press **'Quotation Summary'**.

## Quotation summary

Quote details	
14968900/3	
Quotation date	07/01/2021
Expiry date	04/02/2021
Printed date	
Financial product	Personal Contract Hire Anniversary Billing E6
Vehicle	AUDI A3 DIESEL SALOON (2020) 30 TDI Sport 4dr
Initial	1406.27 GBP
Finance	468.76 GBP
Service	0.00 GBP
Periodic rental	468.76 GBP
Effective rental	429.70 GBP
Excess mileage charge	0.064 < 10000
	0.064 between 10000 and 10000
	0.064 > 10000
Co2 g/Km	92
WLTP Co2 g/Km	111
Euro rating	Euro 6 Compliant
NCAP rating	Five Stars
Combined MPG	67.3
WLTP Combined MPG	64.2
Electric Cons.	
Electric Range	
RDE Cert Level	RDE 2
P11D	28227.00 GBP
Available for Factory Order	<input checked="" type="checkbox"/>

Payment & vehicle details			
Envelope ID	Status	Status Date	Number of Documents
85467	SENT	2021-01-07 00:00:00	3
85466	SENT	2021-01-07 00:00:00	3

Payment & vehicle details	
Salesperson	Administration
Your reference	
Initial deposit	Advance payment <span style="float: right;">0.00 GBP</span>
Advance payments	3
Term	36
Frequency	Monthly
Profile	Spread
Annual mileage	10000
Contract mileage	30000

	Price	Discount amount	Discount percent
Basic price	22283.33 GBP	1138.13 GBP	5.00
Factory fitted extras	479.17 GBP	23.96 GBP	5.00
Delivery price	550.00 GBP		
Off invoice support	0.00 GBP		
VAT	4485.87 GBP		
VED	155.00 GBP	VED 01/04/2020	
Testing Logic	MANUAL	Adjusted CO2	110
On the road	27125.23 GBP		
Periodic rental	468.76 GBP		
Sales Code	300.00		

Include Manufacturer's Retrospective Support

[Print quotation](#)
[Revise quotation](#)

[Invoice breakdown](#)
[Create activity](#)

[Copy quotation](#)

[Customer detail](#)

**Factory fitted extras**

Metallic - Manhattan grey	18.07 GBP
Twin leather - Black with rock grey stitching	0.00 GBP

**Ancillary fitted extras**

None selected

**Dealer fitted extras**

PLY	6.04 GBP
SIGNWRITING	1.01 GBP

**Standard fit**

**Quotation services**

Customer Maintained	0.00 GBP
No Relief Vehicle	0.00 GBP

Figures represent the "true" monthly rental cost and may differ from the periodic rental charged

**Quotation actions**

[Credit Increase](#)
[Copy Credit Increase](#)

[Attach documents](#)

[View documents](#)

**Quote revisions**

Quotation	Date	Vehicle	Payment	Status
14968900/3	07/01/2021	AUDI A3 DIESEL SALOON (2020) 30 TDI Sport 4dr Fitted with: Metallic - Manhattan grey, Twin leather - Black with rock grey stitching, SIGNWRITING, PLY On the road: 27125.23, Sales code: 300 WP PCH New, Customer Maintained, No Relief Vehicle, No Accident Management Contract details: 36 Months, 30000 Miles, Spread	468.76	Accepted

### 3.4 MULTI VEHICLE QUOTE

On Arval Web Partners you are able to search for a number of vehicles using the Multi Vehicle search function.

Select **'New customer quote'** or **'Existing customer quote'**. Choose the product you wish to quote on and select the Payment details, Mileage, Frequency, Profile and Sales Code required.

Press the **'Select vehicle'** tab.

**Contract details**

Contract details

Contract profile  
Default profile  
Initial payment/deposit  
Advance rentals  
Term  
Annual mileage  
Contract mileage  
Frequency  
Profile  
Followed by payments  
Length of pause  
Salesperson  
Sales code

WP Contract Hire New  
WP Contract Hire Total Care New  
WP Contract Hire Used  
WP Regulated Contract Hire New  
WP Regulated Contract Hire Total Care New  
WP Regulated Contract Hire Used  
WP Contract Hire Margin Used  
WP Regulated Contract Hire Margin Used  
Z - WP PCH New - DO NOT USE  
WP PCH New  
WP PCH Total Care New  
WP PCH Used

⇒ Select vehicle

Choose the **Multi vehicle search** tab.

WLTP MPG Combin  
Electric Cons  
Electric Range  
RDE Cert Level

⇒ Multi vehicle search

⇒ Select options

⇒ Quotation summary

Please enter your "Rate Book" search criteria.

Search engine restrictions			
Maximum periodic payment	<input type="text"/>	Minimum periodic payment	<input type="text"/>
Maximum P11D value	<input type="text"/>	Maximum list price	<input type="text"/>
Maximum engine CC	<input type="text"/>		
Maximum Co2 emissions	<input type="text"/>	Minimum Co2 emissions	<input type="text"/>
Maximum number of doors	<input type="text"/>	Minimum number of doors	<input type="text"/>
Euro rating	<input type="text" value=""/>	NCAP rating	<input type="text" value=""/>
Metallic finish	<input type="checkbox"/>	Air conditioning	<input type="checkbox"/>
Leather interior	<input type="checkbox"/>	Sun roof	<input type="checkbox"/>
Alloy wheels	<input type="checkbox"/>	Automatic	<input type="checkbox"/>

Search engine specific types	
➔ Specific 'makes'	No 'makes' have been selected to include or exclude from the search
➔ Specific 'models'	No 'models' have been selected to include or exclude from the search
➔ Specific 'body types'	No 'body types' have been selected to include or exclude from the search
➔ Specific 'fuel types'	No 'fuel types' have been selected to include or exclude from the search

➔ Search vehicles

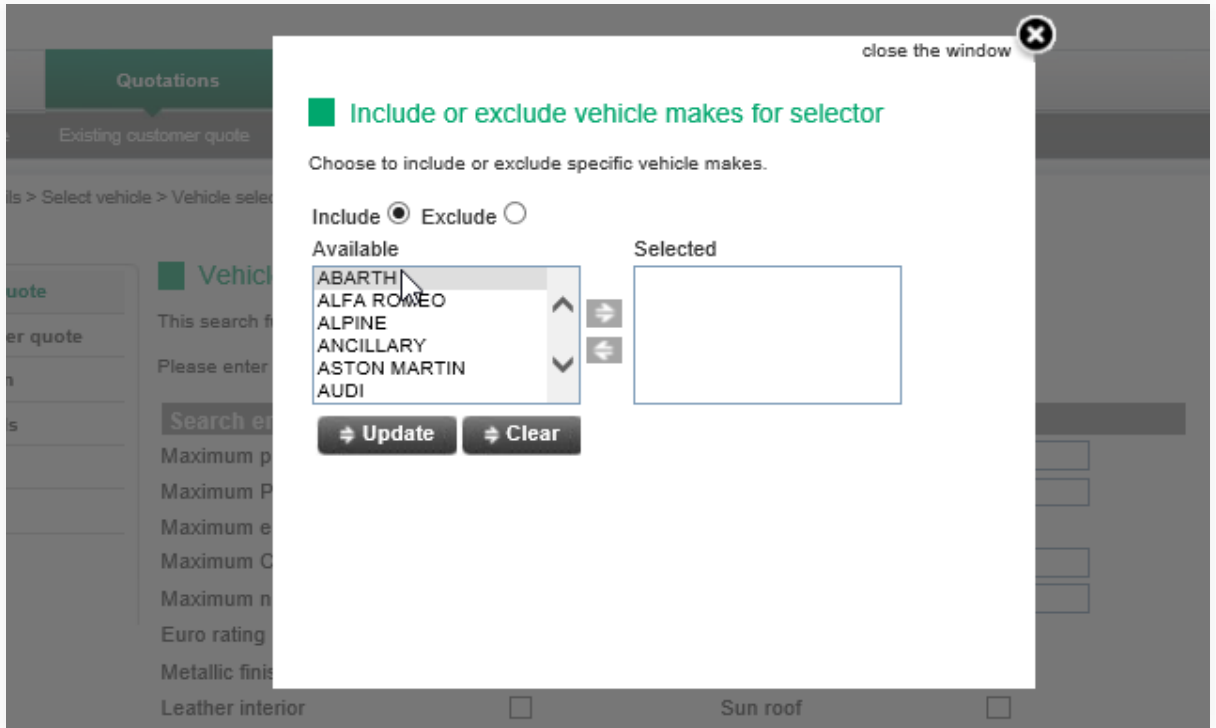
To select your vehicles, choose from the following options:

- Input a maximum and a minimum rental in the boxes above (these are mandatory fields).

You are also able to select:

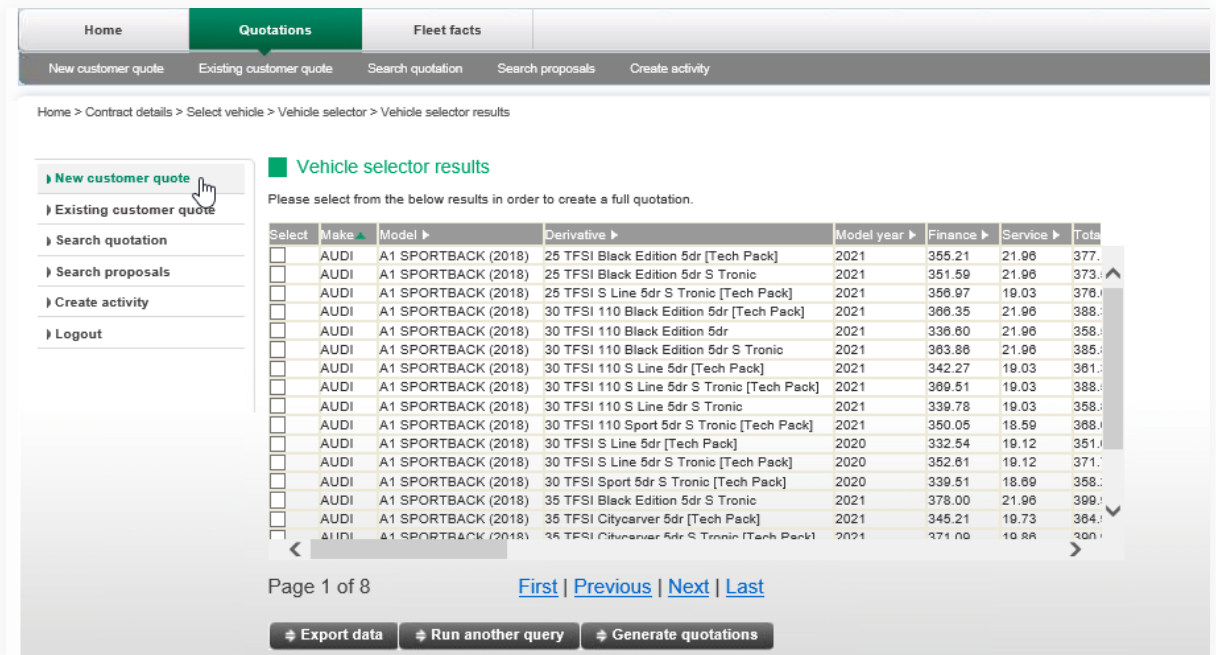
- ✓ **Specific Makes**
- ✓ **Specific Model Derivatives**
- ✓ **Specific Body Styles**
- ✓ **Specific Fuel Types**

For each of these selections you are able to include or exclude as many or as few criteria as required. For example, highlight the Model Derivatives required and click the arrow pointing to the right. Once you have finalised your selection press the **'Update'** tab.



Once you have completed your search parameters press the **'Search Vehicles'** tab.

A list of all the vehicles matching your search criteria will be displayed. The results can be sorted into any order you require by clicking on the title bar.



There are three options here:

- **Export data** - into a CSV or Microsoft Excel spreadsheet.
- **Run Another Query** - this will allow you to create a new search.
- **Generate Quotations** - using the select column you can tick the vehicles you wish to turn into quotations. Once your selections have been made, a message will appear asking if you wish to create a quotation on the selected vehicles, choose **OK**. The quotations will be generated as separate revisions of the same quote number. Any of these revisions can be amended or taken to proposal or order.



Quotation	Date	Vehicle	Payment	Status
14972977/3	11/01/2021	AUDI A1 SPORTBACK (2018) 35 TFSI Sport 5dr S Tronic Fitted with: Metallic paint, Pearlescent paint On the road: 24913.99, Sales code: 0 WP Contract Hire New, Guaranteed Maintenance (Broker), No Relief Vehicle, No Accident Management, Breakdown Assistance Contract details: 36 Months, 30000 Miles, Spread	379.61	Open
14972977/2	11/01/2021	AUDI A1 SPORTBACK (2018) 25 TFSI S Line 5dr S Tronic [Tech Pack] Fitted with: Metallic paint, Pearlescent paint On the road: 26499, Sales code: 0 WP Contract Hire New, Guaranteed Maintenance (Broker), No Relief Vehicle, No Accident Management, Breakdown Assistance Contract details: 36 Months, 30000 Miles, Spread	402.78	Open
14972977/1	11/01/2021	AUDI A1 SPORTBACK (2018) 35 TFSI Citycarver 5dr [Tech Pack] Fitted with: Metallic paint, Pearlescent paint On the road: 26489, Sales code: 0 WP Contract Hire New, Guaranteed Maintenance (Broker), No Relief Vehicle, No Accident Management, Breakdown Assistance Contract details: 36 Months, 30000 Miles, Spread	391.73	Open

### 3.5 QUOTATION SUMMARY SCREEN

This screen is split into sections. The Quote Details are not amendable and can be hidden by clicking on the white arrow on the title bar. This section will display the following details:



## Quotation summary

Quote details	
Quote number	1497077/1
Quotation date	11/01/2021
Expiry date	08/02/2021
Printed date	
Financial product	Contract Hire A1
Vehicle	AUDI A1 SPORTBACK (2018) 35 TFSI Citycarver 5dr [Tech Pack]
Initial	1175.19 GBP
Finance	372.00 GBP
Service	19.73 GBP
Periodic rental	391.73 GBP
Effective rental	428.93 GBP
Excess mileage charge	0.103 < 10000
	0.103 between 10000 and 10000
	0.103 > 10000
Co2 g/Km	120
WLTP Co2 g/Km 	142
Euro rating	Euro 6 Compliant
NCAP rating	Five Stars
Combined MPG	44.8
WLTP Combined MPG 	44.8
Electric Cons.	
Electric Range	
RDE Cert Level	
P11D	26145.01 GBP
Available for Factory Order	<input checked="" type="checkbox"/>

- The quotation number and revision.
- The date the quote was generated.
- The quotation expiry date – this will usually be 28 days unless the vehicle quoted has support terms attached to it. If the support terms are expiring in less than 28 days, a message will be generated advising that the quotation validity date has changed to mirror that of the support terms.
- The Product.
- The vehicle.
- Initial/Finance and Service rental splits.
- Periodic rental.
- Effective rental.
- Excess mileage charge (ppm).
- Technical detail.
- P11D Value.
- Vehicle benefit in kind tax by taxation band.

Within the **Payment and Vehicle Details** section, the following fields can be amended: (prior to making any amendments please press the '**Revise Quotation**' button)

**Payment & vehicle details**

Salesperson: Administration

Your reference:

Initial deposit: 0.00 GBP

Advance rentals: 3

Term: 36

Frequency: Monthly

Profile: Spread

Annual mileage: 10000

Contract mileage: 30000

	Price	Discount amount	Discount percent
Basic price	20279.17 GBP	0.00 GBP	0.00
Factory fitted extras	958.34 GBP	0.00 GBP	0.00
Delivery price	550.00 GBP		
Off invoice support	0.00 GBP		
VAT	4366.50 GBP		
VED	215.00 GBP	VED 01/04/2020	
Testing Logic	WLTP - Model Standard	Adjusted CO2	
On the road	28469.00	GBP	
Periodic rental	391.73	GBP	
Sales Code	0.00		
Is Manufacturer's Retrospective Support currently included in this quotation?	No		
Include Manufacturer's Retrospective Support	No		

Support

**Recalculate** **Quotation services**

- Your reference.
- Initial Deposit – This will show as 0 if Advance Rentals have been selected.
- Advance Rentals – This will show as 0 if Initial Deposit has been selected.
- Terms.
- Frequency.
- Profile.
- Annual Mileage.
- Contract Mileage.

Select the '**Recalculate**' button once amendments have been made.

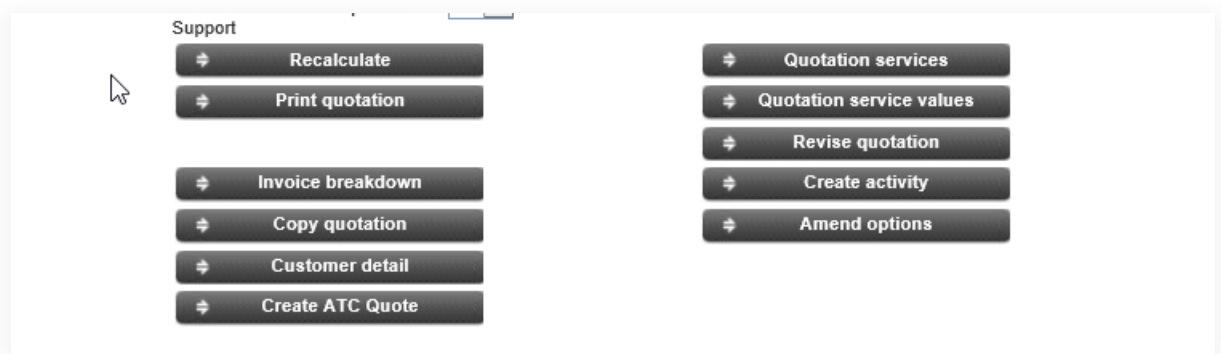
Support

**Recalculate** **Quotation services**

The following vehicle fields can be amended:

- **Discount Percentage** – The default discount will already be pre-loaded in the system. We do not recommend you change this amount.
- **On the Road Cost** – If you enter an on the road price, the Manufacturers VRB will be automatically removed from the quote. This is to protect you from accidentally double counting any Manufacturers VRB.
- **Periodic Rental** – A target rental can be entered and this will automatically increase or decrease your sales code.
- **Sales Code** – This is your commission. The maximum commission payable is 10% of the On the Road cost of the vehicle, up to maximum total of £5,000.
- You must select '**Recalculate**' after each change.

The following functions are available:



- **Print quotation** – a new tab opens in your web browser. You are able to print or email the quote.
- **Revise quotation** – this will make another revision of the quotation and will keep the same validity period as the original revision. This allows you to manipulate the quotation and compare them side by side at the bottom of the quotation summary screen.
- **Quotation services** – This allows you to add or remove services from your quotation such as maintenance and relief vehicle.
- **Quotation services value** – This will display the rental apportioned to each service.
- **Invoice breakdown** – This will display the value you need to invoice Arval for payment for your vehicle.

- ❑ **Copy Quotation** – This will copy your quotation within the validity date and provide you with a new quote number.
- ❑ **Create ATC quote** – This will provide you with a ATC quote on a new revision.
- ❑ **Create activity** – Choose this to workflow an activity to pricing for a conversion or for a prestige vehicle.

**Create activity request**

Select an Activity class, and enter your comments.

Activity class

## 3.6 CO2/VED/WLTP/NEDC/API

You must ensure the CO2 and VED Cost is correct. The VED box on the right hand side will tell you which year the VED amount relates to which is particularly important around April each year when the changes are implemented by the government.

VED  VED

Testing Logic  Adjusted CO2

If the CO2 is not correct please enter the CO2 of the vehicle (the quote will revert to Manual) and the VED amount will be updated. Again please ensure to check the VED box on the right hand side to check the year the VED relates to.

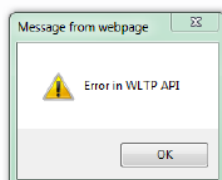
If the CO2 is correct but you believe the VED is still incorrect, please contact your Sales Support Executive who can support you with this to get the quote manually changed. It is important this is done at quote stage to prevent any delivery pack errors at payout. If you try and correct it using the OTR, the VAT will be wrong and there will be payout delays.

Any queries please contact your Sales Support Executive.

### System Error Notifications

If you are quoting a manufacturer who is opting for an API response but haven't made their data available yet, you will see the below error message before you proceed to your quotation summary.

If you get this flag – your quote will be indicative and you must check your CO2 values and revert your quote to MANUAL.



In any scenario where the data is not available, most likely where the API call fails or if you add options to a WLTP Model Standard quote, you will see the below Warning message highlighted in yellow. In order to ensure your quote is accurate for your customer you will need to confirm the CO2 values and revert to MANUAL pricing.

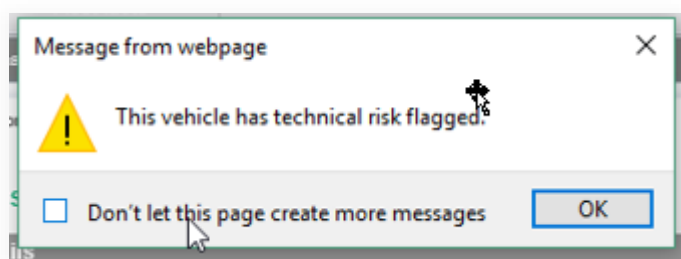
VED	210.00 GBP		
Testing Logic	WLTP - Model Standard	Adjusted CO2	
On the road	23854.14	GBP	
Periodic rental	313.01	GBP	
Sales Code	0.00		
Is Manufacturer's Retrospective Support currently included in this quotation?	No		
Include Manufacturer's Retrospective Support	No		

Your quote contains indicative CO2 or MPG values. The data could not be retrieved while producing the quote, so we have based it on the lowest possible cost. The quote will need to be updated with the accurate information before we can proceed to order.

Any queries please contact your Sales Support Executive.

## 3.7 PRESTIGE/EXOTIC VEHICLE

You will receive a warning if quoting on a prestige vehicle.



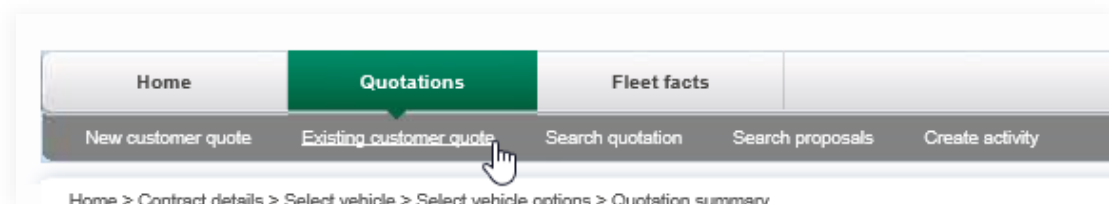
This means the quote must go to pricing for review before quoting the customer. Pricing will revise your quote onto the next revision for you to proceed on.

**Note:** Once a quote has been revised by pricing, the only thing you can change is the commission. If you change the term, mileage, an option, OTR etc the quote will have to go back to pricing for review.

### Quotation actions

- **Business proposal** – Business Proposals for Regulated and Unregulated Companies are completed by selecting this tab.
- **Individual proposal** – Personal Contract Hire Proposals are completed by selecting this tab.
- **Attach documents** – This tab will enable you to attach scanned documents to support a Credit proposal.
- **View documents** – This tab will enable you to view any documents stored against this quotation, for example supporting information for Credit Proposals or a Credit Decision.
- **Request documentation** – This tab is used to request Arval to send docs.
- **Quote revisions** – All quote revisions will be listed displaying basic information associated with the quotation.

To run a quote for an existing client, select '**Existing Customer Quote**'.



Use the scroll bar of type the first initial of the customer's name to select your customer, then press '**Contract Details**'.

Choose the product you wish to quote on from the Contract Profile dropdown box.

You can then follow the process as described previously.

## 3.8 USED VEHICLE QUOTE

A used vehicle quote should be used if a vehicle has been registered, delivery will be between 91 days and 6 months from when the vehicle was registered (unless otherwise agreed for example on a campaign/special offer vehicle).

Maximum mileage on a used vehicle is 5,000.

**Contract details**

Contract details

Contract profile  
Default profile  
Initial payment/deposit  
Advance rentals  
Term  
Annual mileage  
Contract mileage  
Frequency  
Profile  
Followed by payments  
Length of pause  
Salesperson  
Sales code

WP Contract Hire New  
WP Contract Hire Total Care New  
WP Contract Hire Used  
WP Regulated Contract Hire New  
WP Regulated Contract Hire Total Care New  
WP Regulated Contract Hire Used  
WP Contract Hire Margin Used  
WP Regulated Contract Hire Margin Used  
Z - WP PCH New - DO NOT USE  
WP PCH New  
WP PCH Total Care New  
WP PCH Used

Administration

⇒ Select vehicle

### 3.9 CONVERSION QUOTE

Run your quote and click on 'Create activity' and select 'Conversion Quote'

**Create activity request**

Select an Activity class, and enter your comments.

Activity class  
Conversion Quote  
KYC Additional Information  
Manual KYC Checks Required  
Used Vehicle Pricing Request

Comments

Send

close the window

ental 387.24 GBP

Send the full conversion details to your sales support executive via email for them to forward to pricing.

Pricing will then have the conversion details and your activity to review, your quote will be revised onto the next revision for you to proceed on.

## **3.10** GOVERNMENT GRANT VEHICLE

Guide can be found on the **eLibrary**.



## 4. Credit Proposals

When your customer wishes to proceed with a quotation you will need to submit a proposal to Credit Analysis. These guides may be useful which can be found in the **eLibrary**.

- SME Credit Policy
- Data Privacy Script
- Verbal Consent Script
- RIA Process
- KYC Information Document

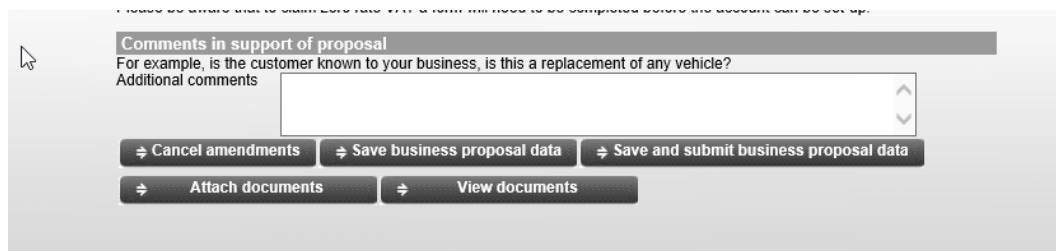
### 4.1 ATTACHING DOCUMENTS AT POINT OF PROP

For all Regulated Customers the latest three months business bank statements and confirmation of overdraft facility if applicable **or** latest financial Accounts must be provided.

For Business customers trading **less** than two years, the latest three months Business bank statements and current overdraft facility confirmation if applicable are required.

High Value Vehicles (OTR over 45k) for both BCH and PCH, three months bank statements and confirmation of overdraft facility if applicable are required.

To attach information to support your proposal select '**Attach Documents**' at the bottom of the proposal page.



Comments in support of proposal  
For example, is the customer known to your business, is this a replacement of any vehicle?  
Additional comments

⇒ Cancel amendments    ⇒ Save business proposal data    ⇒ Save and submit business proposal data

⇒ Attach documents    ⇒ View documents

The Attach documentation screen will appear.

## ■ Attach documentation

Select a document type and the file from your machine.

Document type

File

Highlight the document type **PRC Proposal Additional Supporting Docs** and select '**Browse**'.

This will open up a window displaying any documents saved on your PC. Find the relevant information and enter **Attach file**. Once the document is attached a message will appear saying 'upload complete', press OK.

If you have just completed your prop and pressed '**save and submit**' then underwriting will receive your prop and your attachments.

**If you have not yet pressed 'save and submit' please do so to ensure credit receive your proposal and attachments for review.**

You can also attach documents in the quote by clicking 'Attach Documents'.

Quotation actions

And then go back into the prop and press 'Save and Submit'.

To exit and continue, press the cross in the right hand corner of the attach documentation screen. This will take you back to the Quotation Summary screen.

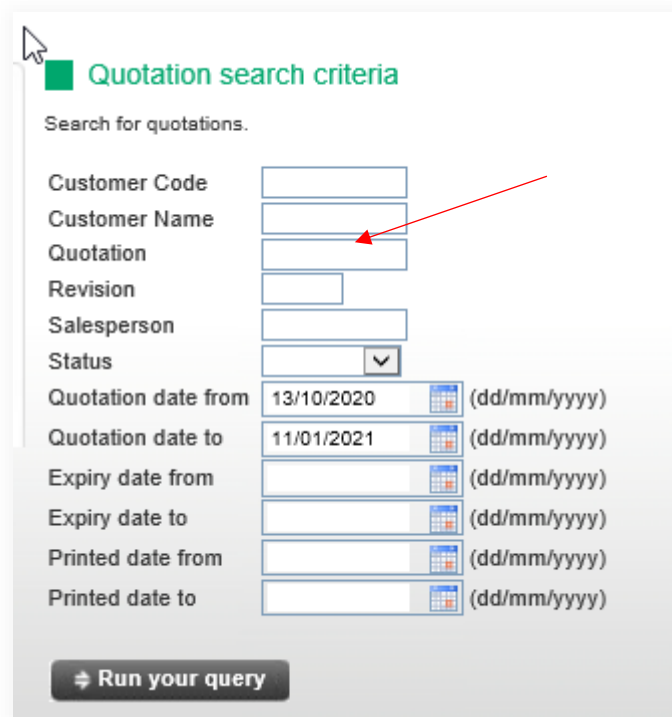
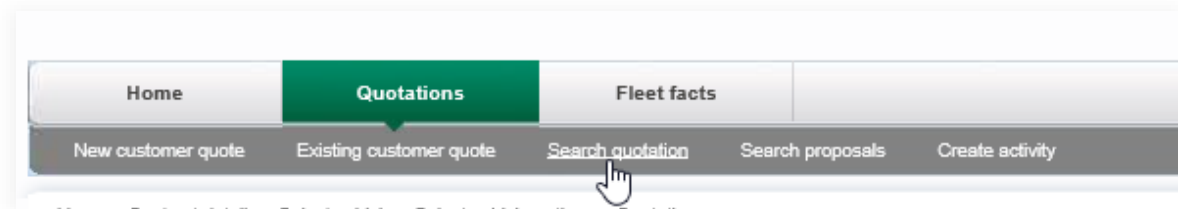
## 4.2 VEHICLE OTR OVER 45K

If the “on the road cost” of the vehicle is over £45,000 we require:-

- Copies of the latest three months Personal Bank Statements / Business Bank Statements which can be attached to the proposal. See the **Attach Documents at point of proposal section** for instructions on how to do this

## 4.3 BUSINESS CUSTOMERS

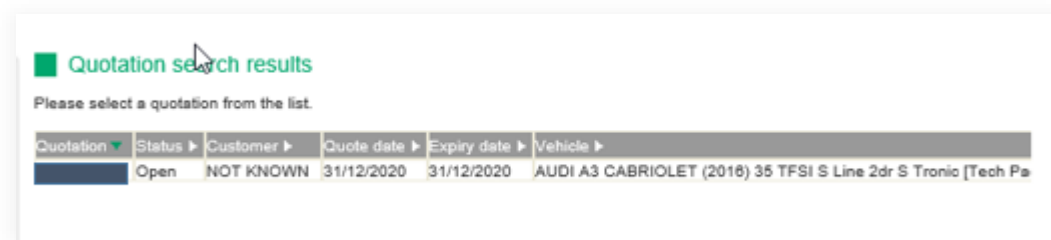
Select the ‘**Search Quotation**’ tab to find your quotation. Enter your quotation, and revision number if known, and press ‘**Run your query**’. If the fields are left blank, all quotes will be returned.

A screenshot of a 'Quotation search criteria' form. The form is titled 'Quotation search criteria' and contains the following fields:

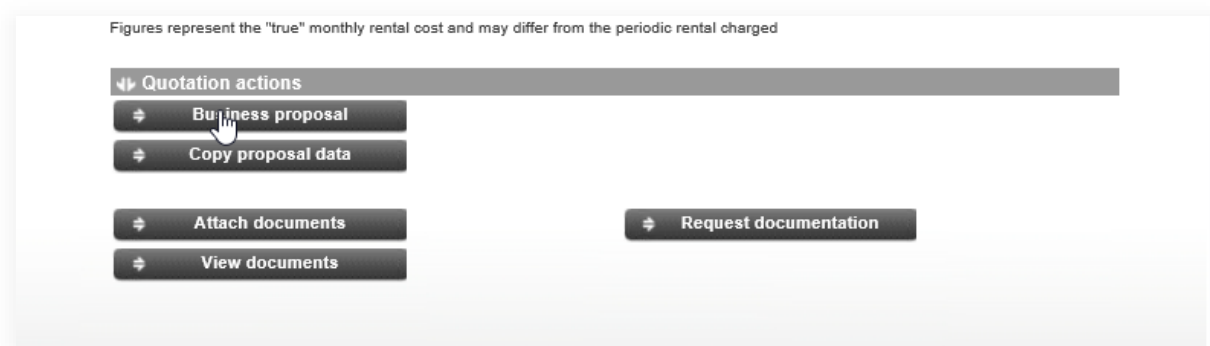
- Customer Code:
- Customer Name:
- Quotation:
- Revision:
- Salesperson:
- Status:
- Quotation date from:  (dd/mm/yyyy)
- Quotation date to:  (dd/mm/yyyy)
- Expiry date from:  (dd/mm/yyyy)
- Expiry date to:  (dd/mm/yyyy)
- Printed date from:  (dd/mm/yyyy)
- Printed date to:  (dd/mm/yyyy)

A red arrow points to the 'Customer Name' field. At the bottom of the form is a button labeled 'Run your query'.

Your results will be displayed.



Select your quotation; this will take you to the quotation summary screen.  
Scroll down the Quotation Summary screen until you reach Quotation Actions.



If Contract Hire or Regulated Contract Hire are quoted, the **Business proposal** tab will be visible, select this button.

Title  Surname   
 Full first name  Initial   
 Job title  Contact tel no   
 Email address   
 By completing this form you confirm you have authority to bind the company

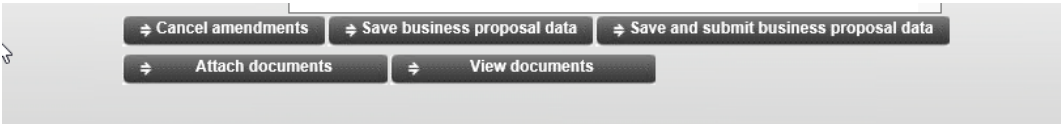
**Company details**  
 Company name  Company reg   
 Please ensure that the Company Registration number for UK companies (excl Charity Commission numbers) has all 8 digits including the "SC" or "NI" prefix for Scotland/Northern Ireland respectively or "0"s at the start of the number where applicable. This ensures both that the correct company is approved but also that you could receive an automated decision response.  
 Website address   
 Parent company name  Trading category   
 No of Partners/Directors  (1 - 99)

**Company trading address**  
 Search Postcode  Enter Postcode...  
  
 Please select address from dropdown...  
 Building name/number  Street   
 Town  County   
 Postcode

**Know Your Customer**  
 Further information available via the button below

Nature of business   
 Year established  Month established   
 Country of incorporation  United Kingdom  
 Trading Names   
 Have you had a Face to Face meeting with the authorised signatory named in the KYC section ?   
 Main Country of Activity  United Kingdom % of overall turnover   
 Other Countries of Activity  % of overall turnover

**Helpful Tip:** If you scroll to the bottom of the page and press save business/individual proposal data, the mandatory fields will be highlighted **BLUE**



When completing the proposal details, you must ensure that **all mandatory** fields are entered. **It is an Arval requirement that we hold a contact email address for all of our customers.** This will be used to contact your customer in respect of 'in life' vehicle requirements such as MOT reminders and expired insurance certificates. The email contact should also be the authorised signatory (listed on Companies House) for business.

The nature of business fields allows our Credit Analysis team to pinpoint exactly the type of customer and the sector that the customer is operating in which will assist in the underwriting process. More info go to KYC Information Document & SME Credit Policy.

When a **Regulated** trading category is selected the proposal form will change; this allows for up to three partners details to be entered. If a Partnership has more than three Partners, it becomes a non-regulated business customer.

Customer contact detail	
Title	<input type="text"/>
Full first name	<input type="text"/>
Job title	<input type="text"/>
Email address	<input type="text"/>
By completing this form you confirm you have authority to bind the company	
Company details	
Company name	<input type="text"/>
Company reg	<input type="text"/>
Please ensure that the Company Registration number for UK companies (excl Charity Commission numbers) has all 8 digits including the "SC" or "NI" prefix for Scotland/Northern Ireland respectively or "0"s at the start of the number where applicable. This ensures both that the correct company is approved but also that you could receive an automated decision response.	
Website address	<input type="text"/>
Parent company name	<input type="text"/>
No of Partners/Directors	<input type="text"/> ( 1 - 99 )
Trading category	<input type="text"/>
Company trading address	
Search Postcode	<input type="text"/>
	<input type="button" value="Enter Postcode..."/>
	<input type="button" value="Lookup"/>
Please select address from dropdown...	
Building name/number	<input type="text"/>
Town	<input type="text"/>
Postcode	<input type="text"/>
Street	<input type="text"/>
County	<input type="text"/>

**Know Your Customer**

Further information available via the button below

[➔ See Document](#)

Nature of business

Year established  Month established

Country of incorporation

Trading Names

Have you had a Face to Face meeting with the authorised signatory named in the KYC section ?

Main Country of Activity  % of overall turnover

Other Countries of Activity  % of overall turnover  [➔ Add](#)

Specific Countries of Activity	Presence	% of overall turnover
Afghanistan	<input type="checkbox"/>	<input type="text"/>
Cuba	<input type="checkbox"/>	<input type="text"/>
Iran	<input type="checkbox"/>	<input type="text"/>
North Korea	<input type="checkbox"/>	<input type="text"/>
Sudan	<input type="checkbox"/>	<input type="text"/>
Syrian Arab Republic	<input type="checkbox"/>	<input type="text"/>

It is mandatory to provide details for us to complete a personal credit search for sole traders and partnerships. For Limited companies, Limited Liability Partnerships and small charities, although it is not mandatory, we would like you to provide details of 2 partners/directors. It is hoped that this will allow us to approve proposals without the need for additional information. This information should be provided where there are 3 or fewer directors in total and where the annual turnover of the business is less than £2,000,000.

**First partner / director details**

Title  Surname

Full first name

Middle Name

Date of birth

Country of Birth  Country of Residence

Search Postcode  [➔ Lookup](#)

Please select address from dropdown...

Building name/number  Street

Town  County

Postcode

Credit Search Script Acknowledgement  You confirm by ticking this box, that you have communicated the Credit Search script with the prospect/existing customer.

[➔ Verbal script](#)

Authorised Signatory

Position in company

Time at address in years

NB. If less than 3 years at current address and verbal consent has been provided, please provide details

Search Postcode  [➔ Lookup](#)

Please select address from dropdown...

Previous building name/number  Previous street

Previous town  Previous county

Previous postcode

### Second partner/director details

Title  Surname

Full first name

Middle Name

Date of birth

Place of Birth  Nationality

Search Postcode

Please select address from dropdown...

Building name/number  Street

Town  County

Postcode

Credit Search Script Acknowledgement  You confirm by ticking this box, that you have communicated the Credit Search script with the prospect/existing customer.

Authorised Signatory

Position in company

Time at address in years

NB. If less than 3 years at current address and verbal consent has been provided, please provide details

Search Postcode

Please select address from dropdown...

Previous building name/number  Previous street

Previous town  Previous county

Previous postcode

### Payment method

Payment method

Please be aware that if the payment method is not selected as Direct Debit then our decision will be slower as it cannot be automated and this may also affect our ability to approve the application. Please add an explanation as a comment at the end of this proposal if anything other than direct debit is selected.

### Fleet details

Total fleet size  Immediate vehicle requirements

Credit line required

Quote number  Monthly rental

Payment profile  Total term

On the Road

Number of renewal cars

Is the OTR of the vehicle over £45,000

If yes please provide:-  
Latest 3 months business bank statements together with a director's driving licence

Attached documents

Will this vehicle be Sub let / Multi User

Is the proposal for a Charity or overseas company who are claiming zero rated VAT?

Data Protection Script Acknowledgement  I communicated the Data Protection Notice (Link: <https://www.arval.co.uk/ps>) to the prospect/existing customer before collecting their personal data.

Please be aware that to claim zero rate VAT a form will need to be completed before the account can be set-up.

### Comments in support of proposal

For example, is the customer known to your business, is this a replacement of any vehicle?

Additional comments

The Credit required field is the total amount of credit required for the customer, it will automatically add the OTR of your new vehicle. If your customer needs

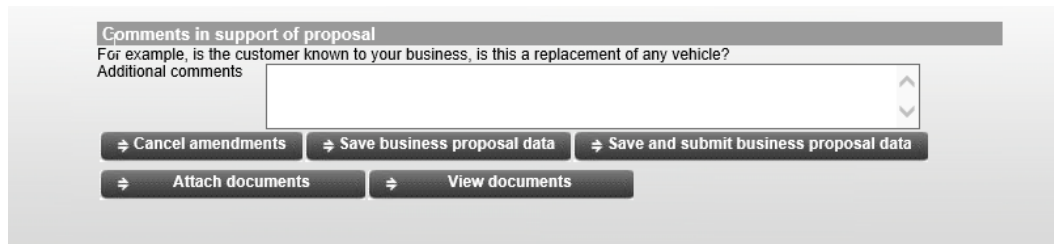


multiple vehicles the sum entered must add up to the total cost of the vehicles added to the already existing credit line.

For Business customers trading **less** than two years, the latest three months Business bank statements and current overdraft facility confirmation if applicable are required.

The **comments in support of proposal** box is a free text box in which you can enter any comments you feel may assist with underwriting.

To send your proposal to Credit Analysis for underwriting scroll to the bottom of the page and select the '**Save and submit**' button.

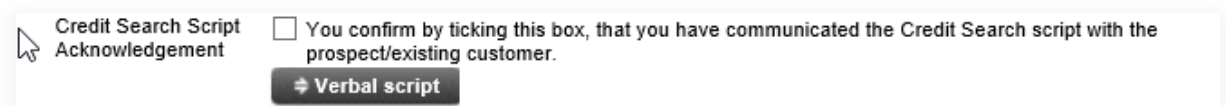


If you are awaiting further data for the proposal, you can save the information you have to go back in to amend and send at a later date.

## 4.4 REGULATED CUSTOMERS

The proposal screen remains the same as the Business Customers except for the partners' details and the supporting information.

Complete all fields for each of the company's partners. Arval accepts verbal consent to credit search the partners, and this must be given by all partners. Press '**Verbal consent script**' to display the wording of the script.



Press **Save and submit business proposal**. You will then be taken back to the Quotation summary screen.

## 4.5 INDIVIDUAL PROPOSALS (PERSONAL CONTRACT HIRE)

Select your quotation; the **Individual proposal** tab will only be visible if a contract profile of Personal Contract Hire is selected.

Customer credit			
Credit line required	33384		
Quote number	14972981 / 1	Monthly rental	GBP
Payment profile	Web Partners Quotation	Total term	36
On the Road	33384.00 GBP		
Is the OTR of the vehicle over £45,000	No		
If yes please provide:-			
Latest 3 months bank statements for the applicant			
Attached documents	<input type="checkbox"/>		
Verbal Script Acknowledgement	<input type="checkbox"/>	You confirm by ticking this box, that you have communicated the verbal credit search script and the Data Protection Notice (Link: <a href="https://www.arval.co.uk/ps">https://www.arval.co.uk/ps</a> ) with the prospective/existing customer before collecting their personal data	
		<b>→ Verbal script</b>	
Face to Face meeting	<input type="checkbox"/>		
Personal details			
Title	<input type="text"/>	Full first name	<input type="text"/>
Surname	<input type="text"/>	Maiden name (if app)	<input type="text"/>
Date of birth	<input type="text"/>	Marital status	<input type="text"/>
Country of Birth	<input type="text"/>	Middle name	<input type="text"/>
Gender	<input type="text"/>	No of dependants	<input type="text"/>
Country of nationality	<input type="text"/>	Residential status	<input type="text"/>
Home phone	<input type="text"/>	Email address	<input type="text"/>
One or other of the phone numbers must be a landline and both fields must be completed even if it is the same number			
Work phone no	<input type="text"/>	Evening phone no	<input type="text"/>



Attachment documents

Verbal Script Acknowledgement

You confirm by ticking this box, that you have communicated the verbal credit search script and the Data Protection Notice (Link: <https://www.arval.co.uk/ps>) with the prospective/existing customer before collecting their personal data

**It is an Arval requirement that we hold a contact email address for all of our customers.** This will be used to contact your customer in respect of ‘in life’ vehicle requirements such as MOT reminders, expired insurance certificates etc. The final contract will also be sent to the customer’s email address. Please ensure the email address is correct. For more information, please use SME Credit Policy, PCH Credit Policy & KYC Information Document.

Once all the fields have been completed, press ‘**Save and Submit**’. This will then take you back to the **Quotation summary** screen.

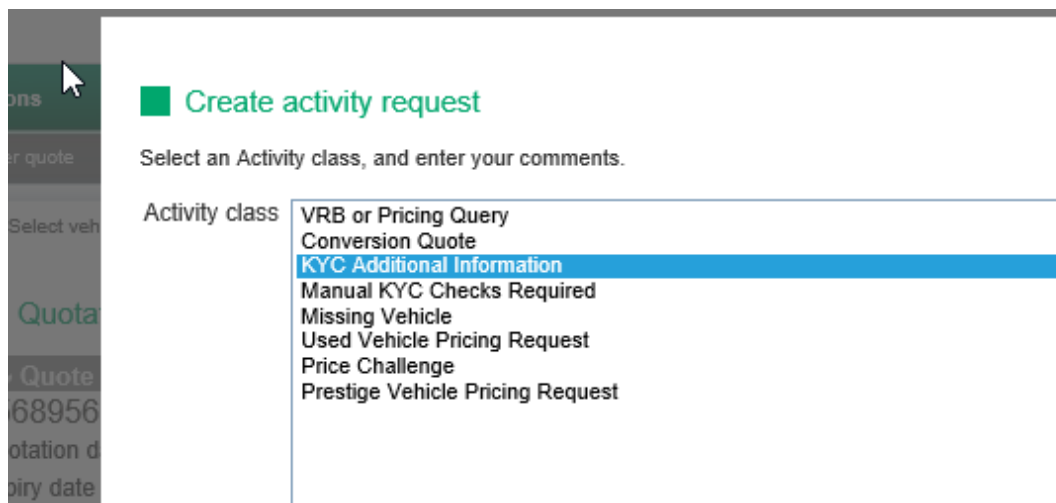
## 5. CREDIT DECISIONS AND MESSAGES

- In most cases Credit and KYC decisions will be made in under two minutes\*.
- No proof of address are required for BCH or PCH (unless additional information is requested) which you will receive a decision via email.
- A message will appear in Arval Web Partners once Credit & KYC checks have been approved and you will see the credit available.

Occasionally the Credit and KYC decision may take longer than two minutes as some decisions still need a manual review or, in an even smaller number of cases, we may require additional information to complete our checks. If you need to send us anything to support this process, we will contact you via messages in Arval Web Partners (for credit) and via e-mail (for KYC) to request this information and advice how to submit this information back.

For example Credit will ask you to go into proposal and click 'Attach Document' select 'PRC Proposal Additional Supporting Docs' then press 'Save and Submit'.

For example KYC will ask you to go into quote, press 'Create Activity' and select 'KYC additional Information'.



ons

er quote

Select veh

Quota

Quote

68956

otation d

piry date

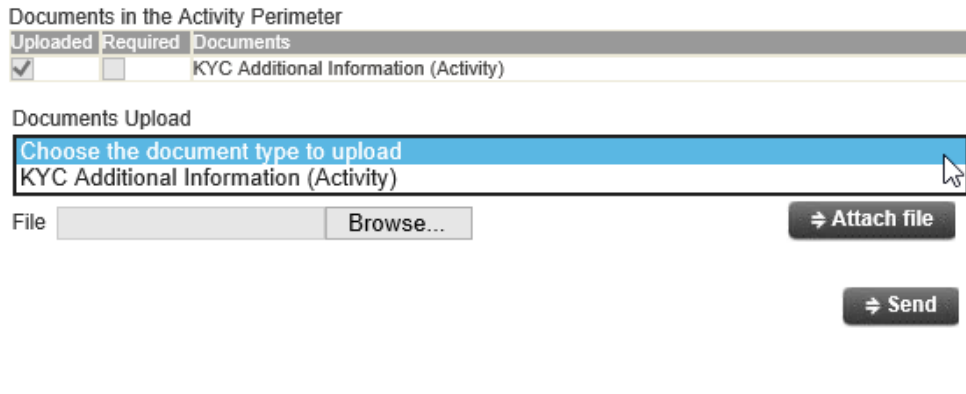
### Create activity request

Select an Activity class, and enter your comments.

Activity class

- VRB or Pricing Query
- Conversion Quote
- KYC Additional Information**
- Manual KYC Checks Required
- Missing Vehicle
- Used Vehicle Pricing Request
- Price Challenge
- Prestige Vehicle Pricing Request

Select 'KYC additional Information' from the drop down box.



The select 'Browse' and locate your document.

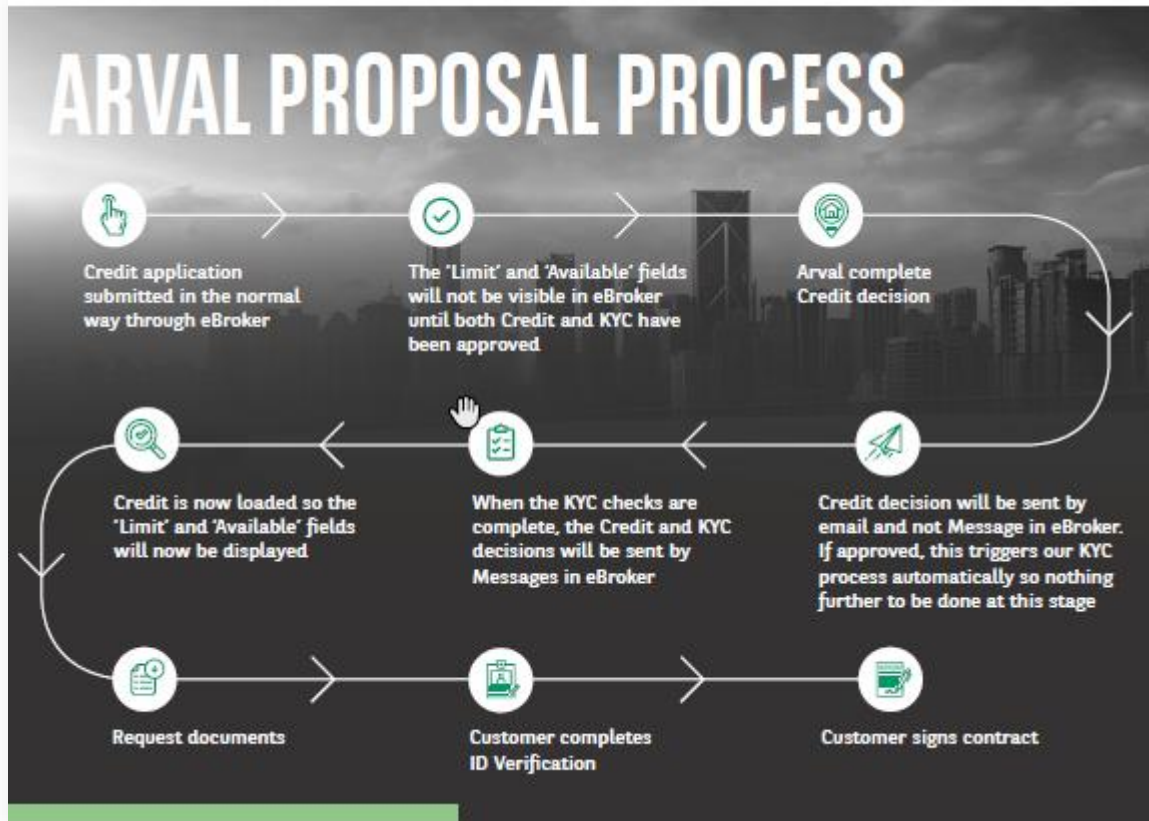


Click 'Attach File' and then 'Send'.



You will then see:



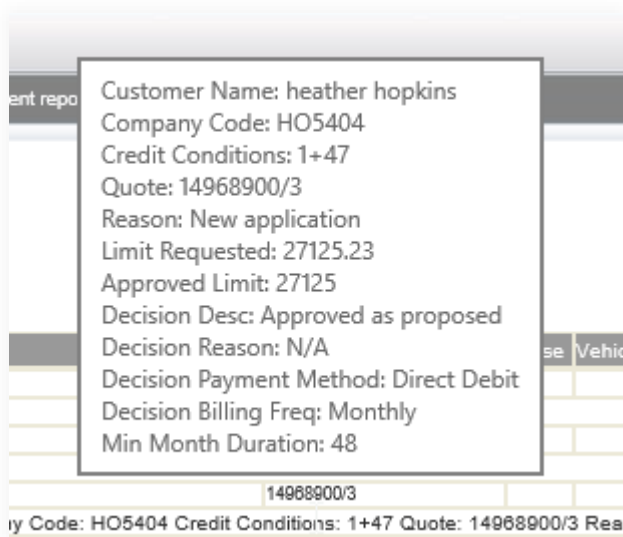


If additional information is required for Credit, you will see a NEW message in eBroker.  
 All credit information for both BCH and PCH\* can now be uploaded in eBroker using "PRC Proposal Additional Supporting Docs" and then pressing "Save and Submit"  
 \*PCH information no longer needs a separate activity creating as you follow the same process as you do for BCH.  
 If additional information is required for KYC, you will receive an email with detailed instructions on how to upload documents and what activity to use to send them to us.

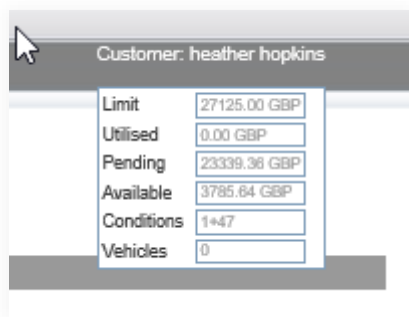
If credit/KYC do not require anything further from you on the Home page next to **View messages (NEW)** will appear. Select '**View messages**' the following will appear.

PRC Status COMPLETED	14968900/3	Don
Customer Name: heather hopkins Company Code: HO5404 Credit Conditions: 1+47 Quote: 14968900/3 Reaso...		

To view the credit decision, hover over.



Select the quotation number. The quotation will open the quote summary screen and top right hand corner you will see credit has been loaded



You can now request Arval to send docs to the customer.

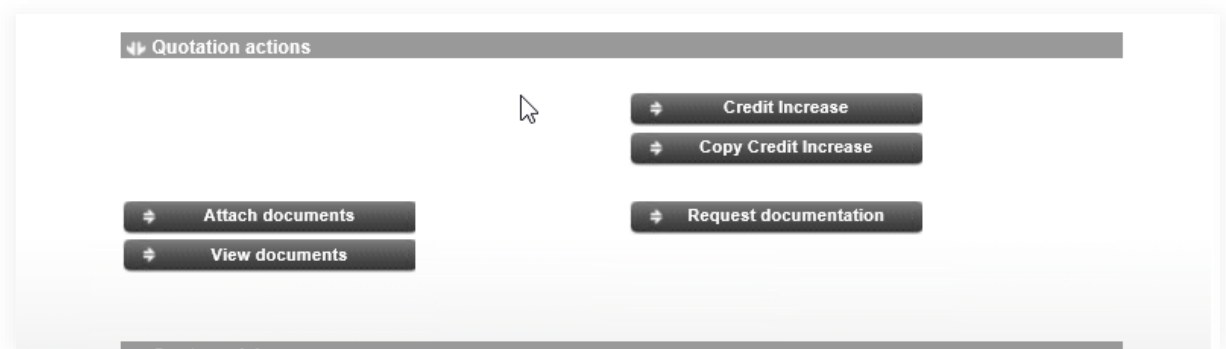


## 6. RAISING DOCUMENTS FOR ORDERS

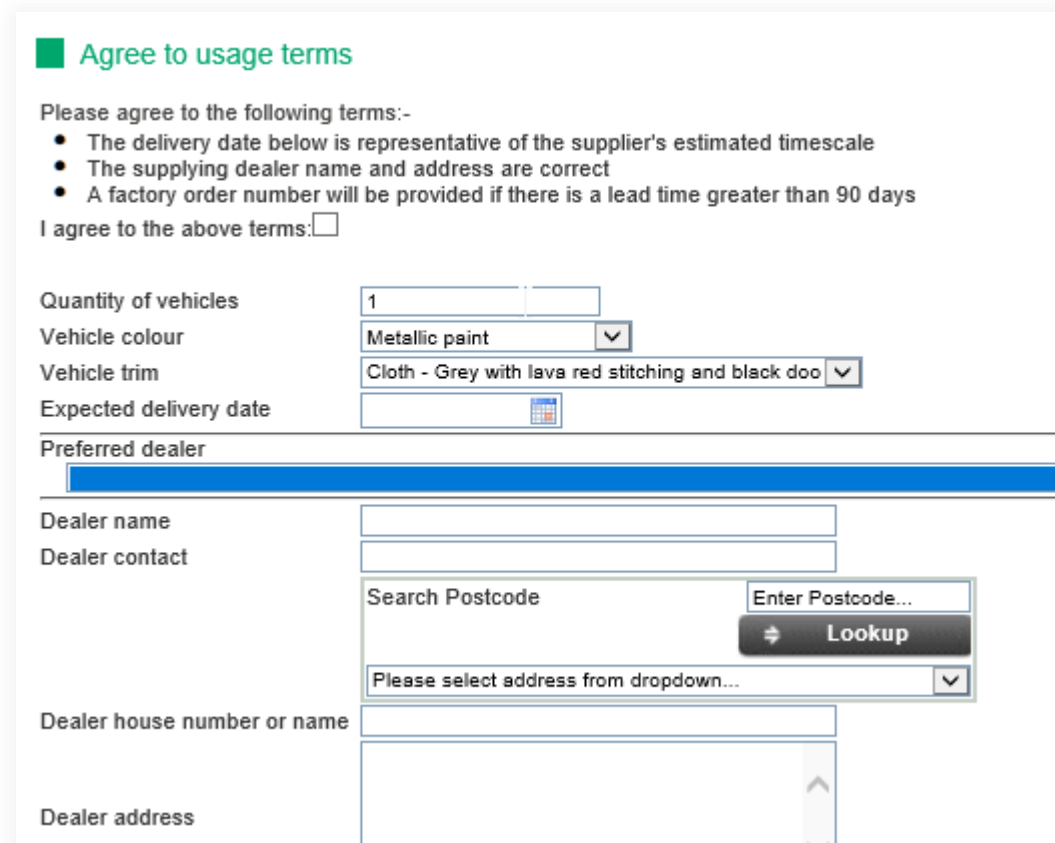
Once you have Credit loaded for your customer, you will need to request for docs to be sent

Select the **'Search Quotation'** tab to find your quotation. Enter your quotation and revision number if known, and press **'Run your query'**. If the fields are left blank, all quotations will be returned. Your results will be displayed.

Scroll down to Quotation actions and select **'Request documentation'**.

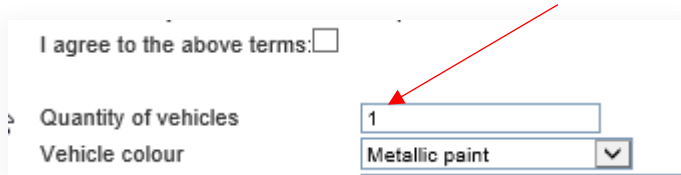


The **Agree to usage terms** screen will appear.

A screenshot of the 'Agree to usage terms' screen. The title is 'Agree to usage terms' in green. Below the title, there is a section titled 'Please agree to the following terms:-' with three bullet points: 'The delivery date below is representative of the supplier's estimated timescale', 'The supplying dealer name and address are correct', and 'A factory order number will be provided if there is a lead time greater than 90 days'. Below the terms, there is a checkbox labeled 'I agree to the above terms:'. The form contains several fields: 'Quantity of vehicles' (input field with '1'), 'Vehicle colour' (dropdown menu with 'Metallic paint'), 'Vehicle trim' (dropdown menu with 'Cloth - Grey with lava red stitching and black doo'), and 'Expected delivery date' (calendar icon). Below these fields, there is a section for 'Preferred dealer' with a blue bar. The 'Dealer name' and 'Dealer contact' fields are empty. There is a 'Search Postcode' field with a 'Lookup' button and a dropdown menu with the text 'Please select address from dropdown...'. The 'Dealer house number or name' and 'Dealer address' fields are also empty.

Complete the Agree to terms box, select the vehicle colour and the trim from the dropdown boxes and complete the remaining fields. Then select '**Request Documentation**'.

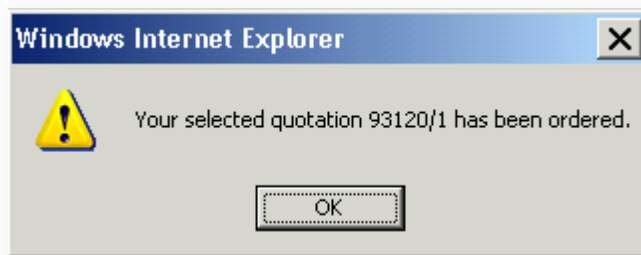
When requesting documents for a multi vehicle order, please enter the quantity needed and ensure the appropriate credit has been loaded for that amount of vehicles.



I agree to the above terms:

Quantity of vehicles:

Vehicle colour:



A pop up message will appear advising that your quotation documentation has been ordered.

We will action your request to send docs within 24-48 hours. Any issues your sales support executive will make you aware.

Please send the IDV FAQ's to your customer, a copy can be found in the **eLibrary**.

## 6.1 SENT & SIGNED REPORTING

Each partner has a specific set up but you will receive daily a **SENT & SIGNED** report via email. This report tells you what docs were sent to a customer and signed by a customer for the previous day.

If you need the information sooner, search quotation and scroll to '**Payment & Vehicle Details**'

Payment & vehicle details			
Envelope ID	Status	Status Date	Number of Documents
88535	SENT	2020-12-18 00:00:00	3

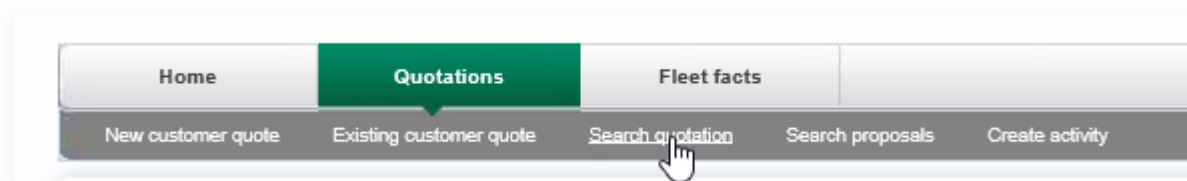
If you click on the word **'sent'** you will see the below, these docs have been sent on the date and time below but not signed yet. Signed docs would give you the date sent and then also signed.

Document Signing Summary			
Quote	[Redacted]		
Customer	[Redacted]		
ID	88535		
Envelope Ref	AAABLbqZhA215DRR-7t4fDXADO3IL- u4WW4da0nLqkTsNDtdIdajWHg7Zjl1U0OZQ_aBMsmOe		
Document Envelope	[Redacted]		
Date	Actor	Description	Status
2020-12-18 16:37:13	D89921	ADOBE	SENT

## 6.2 GOING MANUAL / FAILED IDV

If a customer cannot complete ID Verification or has failed ID Verification please follow the process below

Search quotation



Click 'Create Activity'



And select 'Manual KYC Checks Required'

### ■ Create activity request

Select an Activity class, and enter your comments.

Activity class

- VRB or Pricing Query
- Conversion Quote
- KYC Additional Information
- Manual KYC Checks Required**
- Missing Vehicle
- Used Vehicle Pricing Request
- Price Challenge
- Prestige Vehicle Pricing Request

From the drop down select ' KYC Additional Information'

Choose the document type to upload

- KYC Additional Information (Activity)**

File  Browse...

Select 'Browse' and upload the DL/Passport  
Select 'Attach file' and 'Send'



**\*\*PCH Proofs must be uploaded to original quote where customer was approved/credit load\*\***

KYC will manually review DL and advise you once approved (like a normal credit decision).

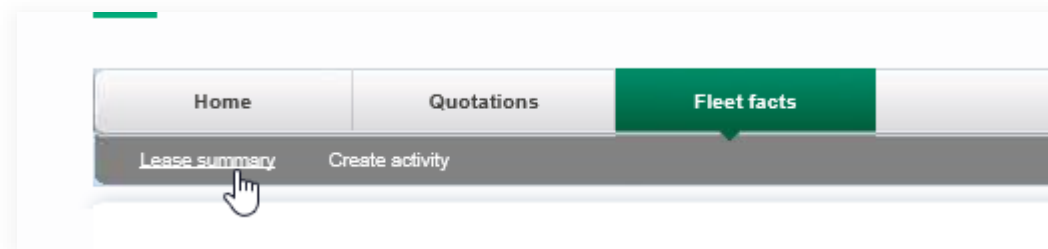
Once approval received:

**Going Manual:** Send your approval to Admin and they will arrange for docs to be sent with no ID Verification, they will advise when sent and when signed via email.

**Failed IDV so going Manual:** Send your approval to your sales support executive who will accept the order and confirm the vehicle can be delivered, or can arrange for manual docs with no IDV to be sent to the customer.

## 7. LIVE VEHICLES AND IN LIFE ACTIVITIES

### 7.1 SEARCHING FOR VEHICLES



All ordered, live and terminated vehicles are searchable within '**Fleet facts**' and this will be used to raise any In Life requests. Select '**Fleet facts**' from the top toolbar and select '**Lease summary**', the Lease summary will be displayed.

A screenshot of the 'Lease summary' search page. The top navigation bar shows 'Home', 'Quotations', and 'Fleet facts' (highlighted). Below it is a secondary menu with 'Change Password', 'Create activity', 'View messages', 'eLibrary', and 'Management reporting'. The breadcrumb 'Home > Lease summary' is visible. On the left, there is a sidebar with 'Lease summary' (selected), 'Create activity', and 'Logout'. The main content area is titled 'Lease summary' and includes a filter instruction: 'Filter by active, ordered or terminated leases, or select a specific vehicle or driver. You can also enter date ranges to enhance your search further.' Below this are several search fields: 'Company Code' (dropdown menu set to 'All customers'), 'Status' (dropdown menu set to 'Active'), 'Registration', 'Lease ID', 'Make', 'Model', and 'Driver Name' (all text input fields). There are also four date range fields: 'Lease start date from', 'Lease start date to', 'Lease end date from', and 'Lease end date to', each with a calendar icon and a '(dd/mm/yyyy)' format hint. At the bottom, there is a 'Run your query' button.

If you know the customer you wish to search for, select them from the dropdown list. Select the status you require.

Or search using the Registration number, Lease ID or any of the other fields. Press **Run your query**.

The Lease summary results screen will be displayed and show the search results. Select the applicable vehicle.

**Vehicle and lease details**

Use this information to view work authorisations or driver history relating to a given vehicle.

Make	VOLVO	Lease ID	
Make	V90 ESTATE (2020)	Lease start	03/12/2020
Derivative	2.0 B4P Momentum 5dr Auto	Lease end	02/12/2023
Reg no		Services included	Customer Maintained - SME No Relief Vehicle No Accident Management Gap Insurance Excluded
Vehicle options	18" 5 double spoke alloy wheels Solid - Ice white	P11D	40025.00
Colour	Solid - Ice white	CO <sub>2</sub>	158 g/Km
Model year	2021	Testing Logic	MANUALMANUAL
Start Odo	411	RDE Cert Level	
Latest Odo	411	Contract mileage	30000
Latest Odo date	03/12/2020	Projected mileage	30411
Next service date	29/11/2023	Next invoice date	03/02/2021
Radio code			
Key code			
MOT due	29/11/2023		
RFL due	31/10/2021		

The vehicle and lease details screen will be displayed. This will show full details of the vehicle and the contract. If the contract contains maintenance and 'Maintenance History' is selected all maintenance records can be viewed.

## 7.2 RAISING AN IN LIFE ACTIVITY

For example, you may need an extension or a mileage amendment quote Go to 'Fleet Facts-Lease Summary' and enter your search criteria like the registration or customer code then press 'Run your query'.

**Lease summary**

Filter by active, ordered or terminated leases, or select a specific vehicle or driver. You can also enter date ranges to enhance your search further.

Customer Code

Status

Registration

Lease ID

Make

Model

Driver Name

Lease start date from  (dd/mm/yyyy)

Lease start date to  (dd/mm/yyyy)

Lease end date from  (dd/mm/yyyy)

Lease end date to  (dd/mm/yyyy)

### Lease summary results

Click on a row to view contract and vehicle details.

End of contract options	Reg	Start	End	Make	Model	Cost	Driver	Term	RFL da
1300022		08/12/2017	07/06/2021	MINI	HATCHBACK (2014)			42	31/08/2

- ▶ Lease summary
- ▶ Create activity
- ▶ Logout

### Lease summary results

Click on a row to view contract and vehicle details.

End of contract options	Reg	Start	End	Make	Model	Cost	Driver	Term	RFL da
1300022	LG67ZNJ	08/12/2017	07/06/2021	MINI	HATCHBACK (2014)			42	31/08/2

Click on the vehicle

### Vehicle and lease details

Use this information to view work authorisations or driver history relating to a given vehicle.

Make	VOLVO	Lease ID	
Make	V90 ESTATE (2020)	Lease start	03/12/2020
Derivative	2.0 B4P Momentum 5dr Auto	Lease end	02/12/2023
Reg no		Services included	Customer Maintained - SME No Relief Vehicle No Accident Management Gap Insurance Excluded
Vehicle options	18" 5 double spoke alloy wheels Solid - Ice white	P11D	40025.00
Colour	Solid - Ice white	CO <sub>2</sub>	158 g/Km
Model year	2021	Testing Logic	MANUALMANUAL
Start Odo	411	RDE Cert Level	
Latest Odo	411	Contract mileage	30000
Latest Odo date	03/12/2020	Projected mileage	30411
Next service date	29/11/2023	Next invoice date	03/02/2021
Radio code			
Key code			
MOT due	29/11/2023		
RFL due	31/10/2021		

↕ Maintenance history

↕ Create activity      ↕ Export data

↕ Back

Select 'Create Activity' and select the relevant activity.



close the window

### Create activity request

Select an Activity class, and enter your comments.

Activity class

- Recontract Request
- Early Term Request
- Formal Extension Quote
- Cherished Plate Request

Comments

Send

In the '**Comments**' for example you could type '12-month extension to end on 30,000 miles'.

We will receive your request and send the relevant quote to you via email.

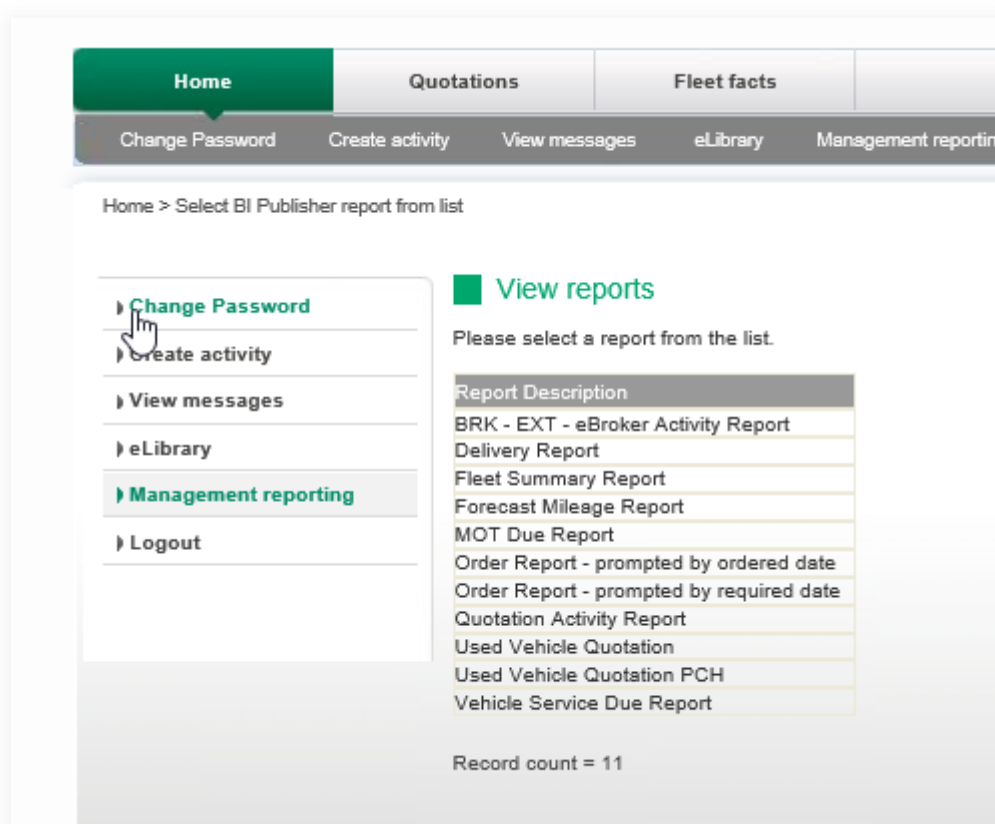
## 8. MANAGEMENT REPORTING

Management reporting allows you to view all aspects of your customer's vehicles. The reports can be configured by selecting all Customers, a specific Customer and specific dates.

Management reporting can be accessed from the Welcome page by either clicking on the Management report icon or by selecting the **Management reporting** tab from the left hand menu in the home screen.



The View reports screen will be displayed.



This will give you a suite of reports that can be run for your Customers. Examples below.

- **Delivery Report** - all deliveries within specified dates for all or a selected Customer.
- **Fleet Summary Report** – a complete listing of all vehicles placed and ordered through Arval.
- **Forecast Mileage** - estimated end mileage based upon the last captured mileage.
- **MOT Due Report** – all vehicles due for MOTs.
- **Order report** – all vehicle orders based on ordered date.
- **Order report** – all vehicle orders based on required by date.
- **Vehicle Service Due report** – all vehicles due for servicing.

To run a report, click on the report title, the Business Report Interaction screen will open in another window or tabbed browsing. Choose your report parameters and click '**Run Report**'.

The report will run and the results will be in a Windows Excel file which can be opened or saved onto your computer.