IGARD PROPRIETORY SOFTWARE

USER GUIDE

IGARD APRIL 2016

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USER GUIDE

Welcome to iGard.

- This user guide will help you as a registered user to sign in and start using GardX's dedicated product registration software.

- The software is designed to facilitate the sales process in order for you to compliantly register the sale of GardX products in order to provide complete product documentation.

- **GARDX Protect – *Protection Products***
- Vehicle Protection System

- **GARDX Assure – *Insured Protection Products***
- C .A .R .S. Cosmetic Accident Repair Solutions (SMART Insurance)
- Tyre & Alloy Wheel Protection
- Alloy Wheel Protection
- Tyre Protection
- Retail Price Asset Protection
- Return to Invoice Asset Protection
- Finance Asset Protection
- Lease Asset Protection
- Taxi Asset Protection

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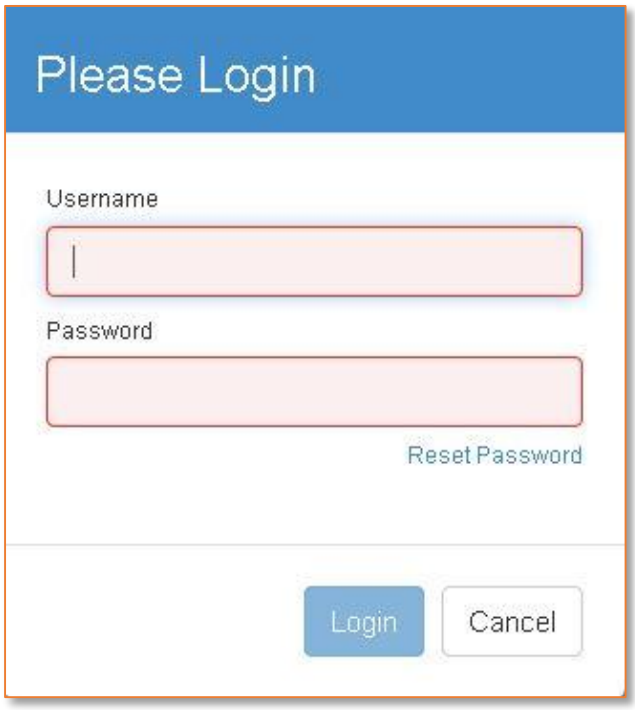
1. GETTING STARTED – HOW TO LOG IN

WEB ADDRESS

Open your web browser and head to https://www.igard.biz
On first loading of this page you will see there is nowhere to enter a username or password. *(Screen displays may differ depending on your user credentials)* Click on any of the below buttons and you will be asked to enter your username and password that were given to you by your system administrator.



You will then be presented with a box to enter your details.

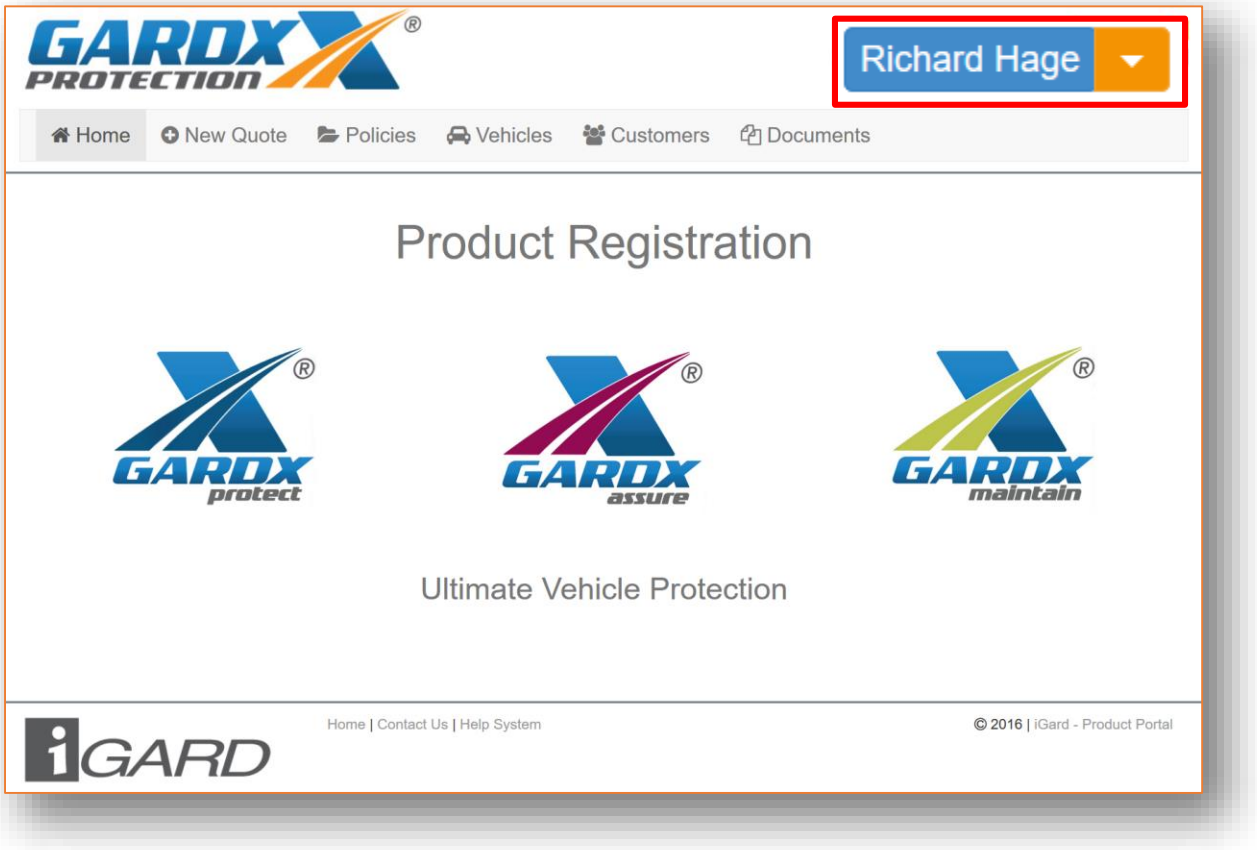
The red boxes turn Blue once you start entering the information.

The "Login" button them becomes available to press and this completes the login.

Once you have entered your details you will be presented with the screen from which ever button you pressed. *(If you pressed the Policies button then that will be the first screen you will see once logged in)*

MAIN PAGE

Once you have logged in you will be able to see your name in the top right of the screen (**red box**) and the main **Home** or **Product Registration** screen if you click the "Home" button. This screen is your portal to the GardX website through the large **GardX Protect** & **GardX Maintain** icons with the **GardX Assure** icon taking you to the product details that you can offer to the customer.



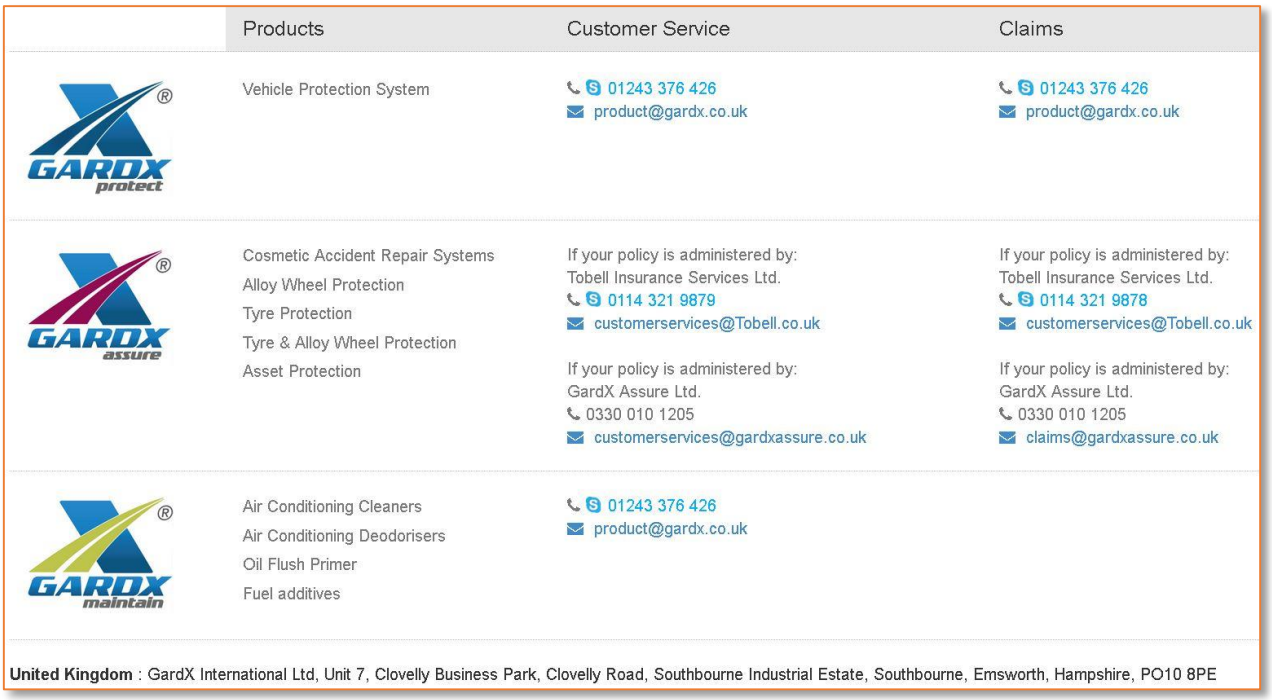
GardX Protect takes you to: https://www.gardx.co.uk/

GardX Assure takes you to: http://www.gardxassure.co.uk/

GardX Maintain takes you to: https://www.gardx.co.uk/

MAIN PAGE LINKS

Under the solid grey line next to the iGard logo in the footer of the page are 3 clickable links. (**Red Box**). The Home link takes you back to the Home



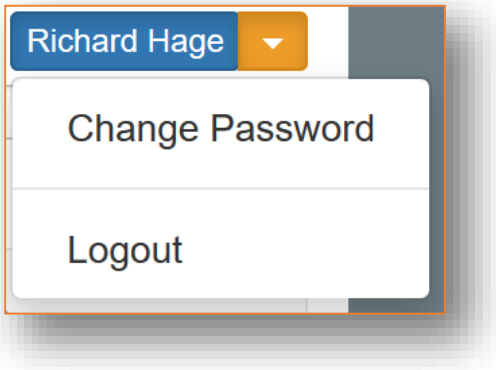
page, the Contact Us page shows who to contact for customer service & claims on different products.

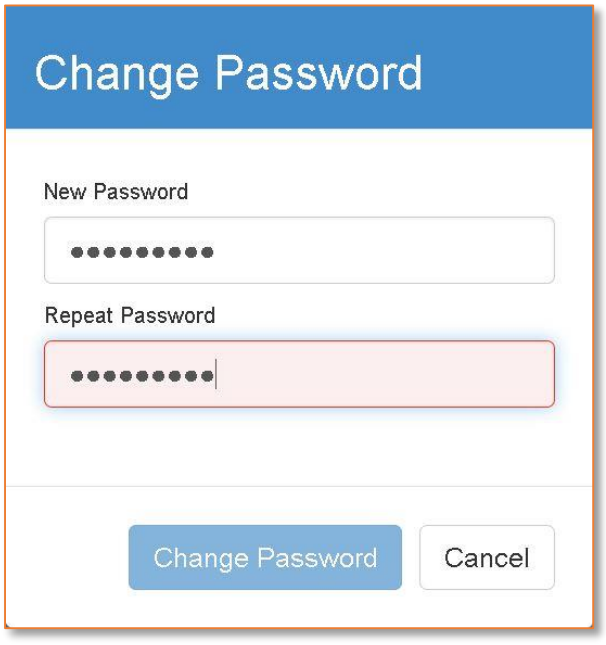
Clicking on the Help System link will bring you to this User Guide which you can view online or download and view at any time.

2. LOGGING OUT & CHANGING THE PASSWORD

To log out of the Product Registration Software click the Orange button next to your username on the home screen and select "Logout". A confirmation box appears and clicking yes to this logs you out.

You will be required every 90 days to change your password. This follows the same path for Logging out on the home screen by clicking the small Orange box next to your username but this time selecting "change Password"



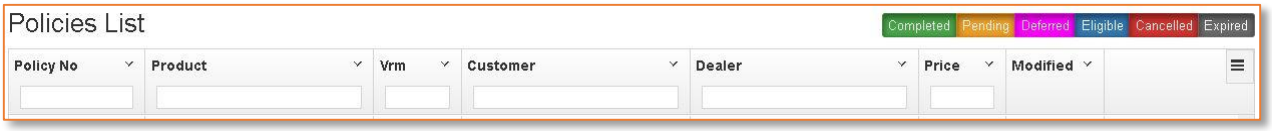


The change password box appears prompting you to enter a new password which you must repeat for confirmation and then click the Blue "Change Password" button that will become available once a new password is entered.

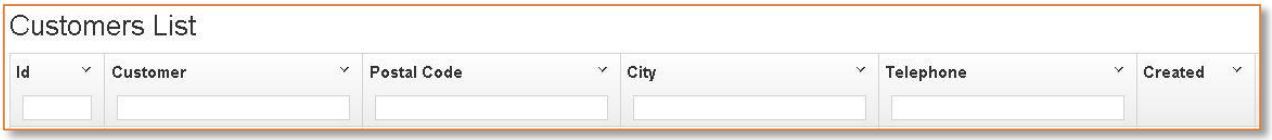
You will receive a message advising the password has been changed and that an email was sent to your registered email address advising you of the change.

3. **HOME PAGE MAIN BUTTONS**

The main page buttons. Policies, Vehicles & Customers gives you a list of the last registered products and each one has its own dedicated search bar at the top of the list. These search bars have separate boxes above each column & as you enter details in them the list below automatically filters the selection.



The Policies list is the only one with its own colour referenced filter set and this enables you to easily filter & see certain states of policies.



The Documents button will take you to a list of the policy certificates and also a summary the purchased products.
See 13. Documents Tab.

4. NEW QUOTE

NOTE: There is no set order to creating a New Quote you can start with any of the tabs

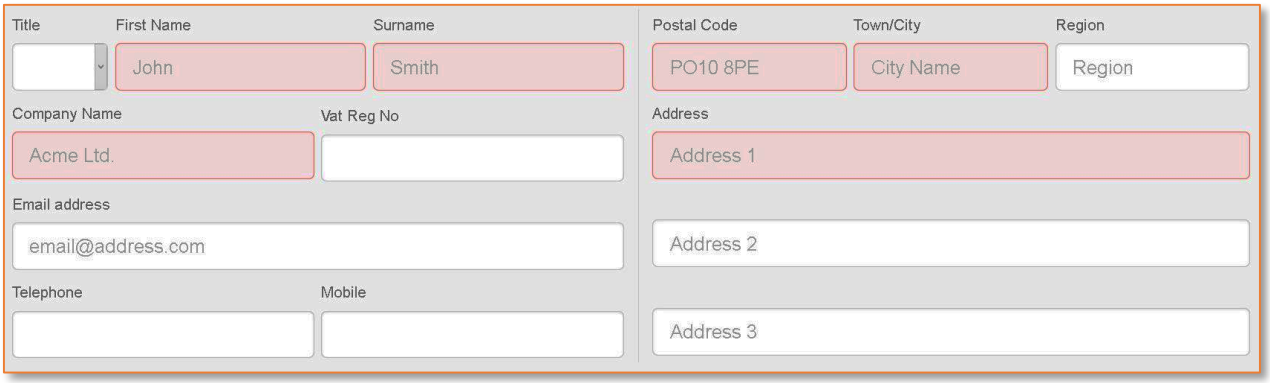
Make sure each TAB is fully completed before clicking to the next one

AVAILABLE PRODUCTS

The New Quote button takes you to a new page which lists the available products at your dealership & customer details data entry,

These can be selected once the **SODAN** questions have been fully completed. (*If your dealership has its own Demands & Needs questionnaire for your customers then you should be able to select these straight away & the D&N tab will not be visible*)

CUSTOMER DETAILS TAB



The boxes in Red are mandatory and must be completed. Some web browsers store suggestions of previously saved names which can help to choose the details faster.

An email address is not mandatory nor are telephone numbers but a warning box will appear prompting you to obtain at least one of these.

CUSTOMER TYPES

The details of this tab change based on what you choose, so for example if you choose "Individual" in the customer type boxes then you will not be asked to enter a company name or contact in the mandatory boxes. "Sole Proprietor" just asks for a company name.

Adding one of the first four titles to the customer automatically completes the gender boxes & you will see one of these highlight in Orange based on the title you choose. Manual selection for the other listed titles will be required.

ADDRESS & POSTCODE

To complete the customers address you can simply type in the post code or the first line of the address in the relevant box. These boxes are PCA Predict enabled which means they should show addresses similar to what you are entering so just scroll through the suggestions and choose the correct listing.

NEW CUSTOMER & CLEAR FORM

Should you want to remove all the details from the current tab use the "clear form" button, however if you wish to completely start again and clear ALL information from ALL the tabs then use the "New Customer" button.

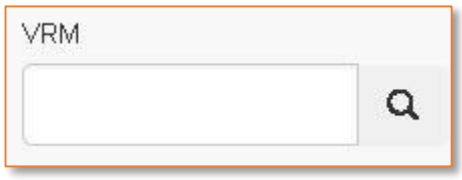
In both cases of pressing these buttons you will be presented with a “Please Confirm” box & confirming will perform the desired action.

In the bottom left corner of the tab are some tick boxes. The first one is ticked by default & is relevant if the customer is considering purchasing GAP products. Unticking this removes GAP products from being selected.

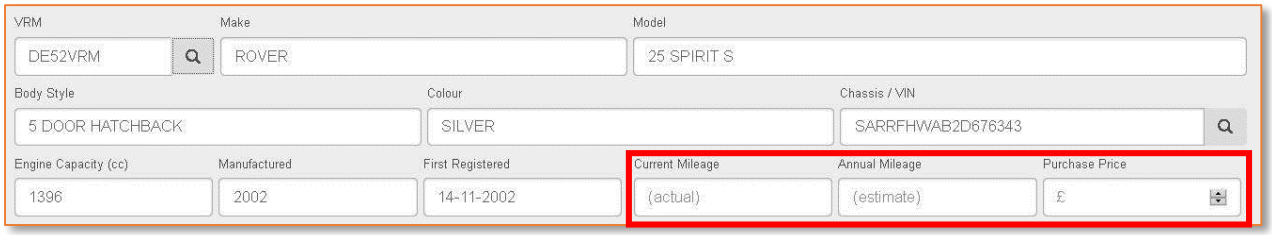
The other tick box is self-explanatory & you should ask the customer about this at the time of sale.

5. VEHICLE DETAILS TAB

The Vehicles Details tab is where all the details for the vehicle being sold are stored. Enter the vehicle registration mark in the VRM box and press the magnifying glass.



If the registration number is valid and currently on the DVLA database list then most of the vehicle details are completed automatically.



You will need to just add the current mileage from the vehicle odometer, ask the customer on the estimated annual mileage & add the purchase price of the vehicle (**Red Box**).

Similarly it is also possible to search for a vehicle from a VIN number.

The fuel type is automatically selected based on the details from the VRM box & will be highlighted in Orange but you can change the type manually if required.

VEHICLE TYPE

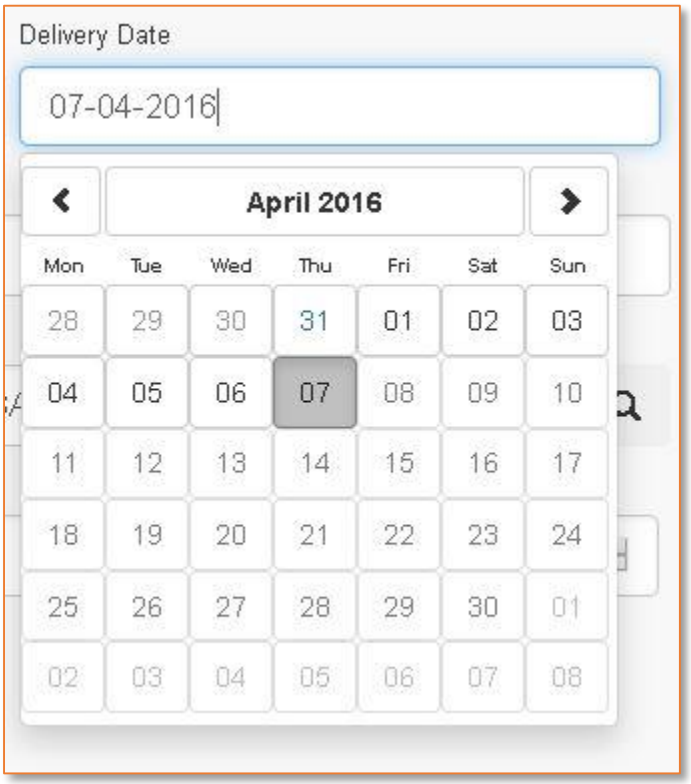
Enter the vehicle type based on what it is by clicking the appropriate box.

SALES TYPE

Also click on the sale type box to distinguish between New & Used sales.

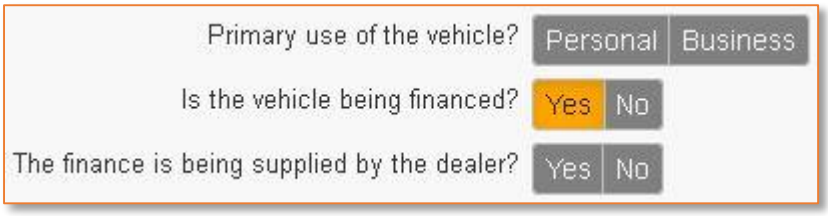
DELIVERY DATE

Enter the expected delivery date of the vehicle. By clicking on this box a calendar will appear and you will be able to pick a date 7 days either side of the current date.



TYRE TYPE

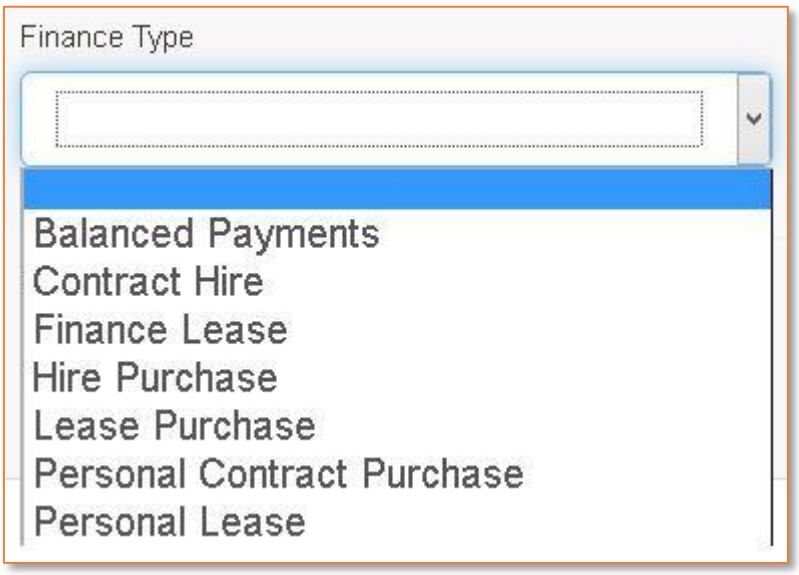
Click on the box that represents the tyres fitted to the vehicle being sold. The chosen type is highlighted in Orange.



In the middle of the tab are three questions relating to the primary use and finance of the vehicle (if applicable).

FINANCE TYPE

If the vehicle is being financed then clicking yes will display another 5 boxes relating to the finance arrangements. The first box **(finance type)** will present you with a drop down list of different finance types.



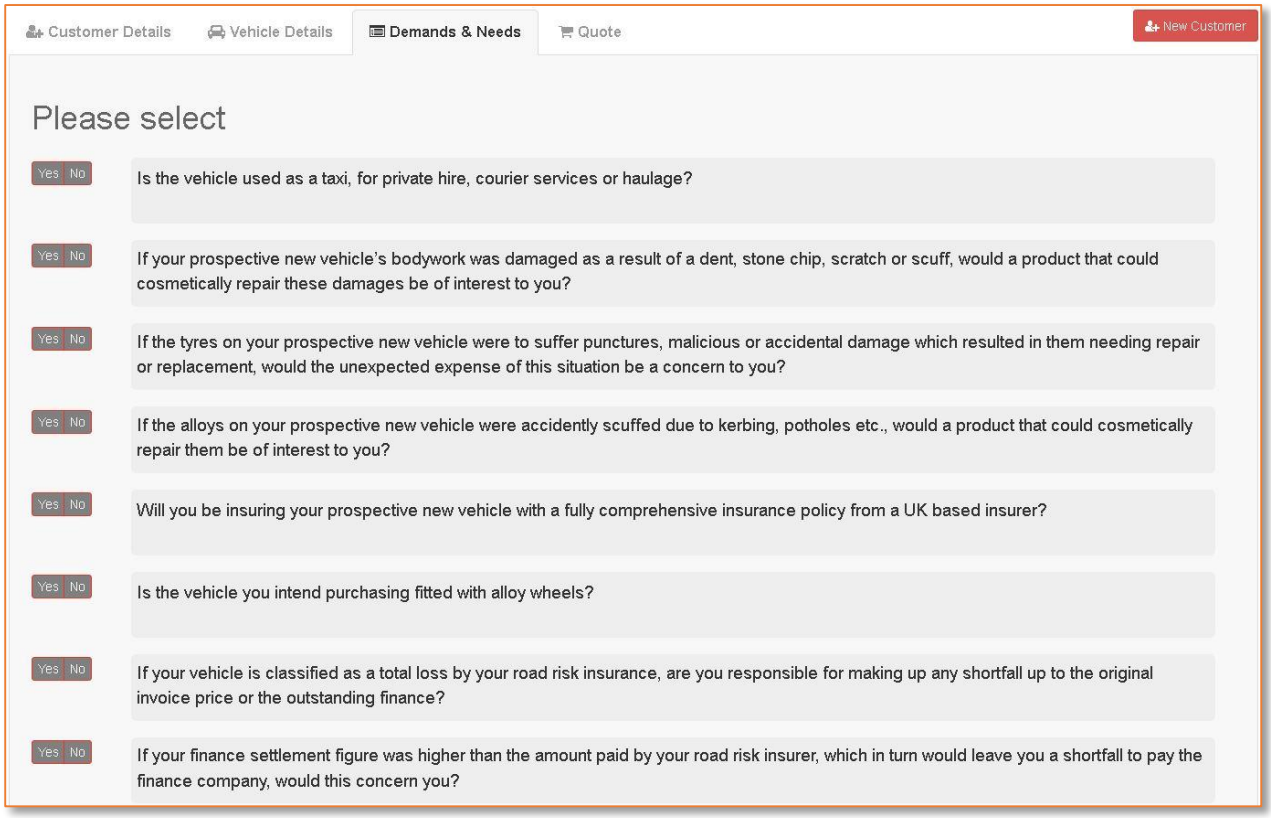
Choose the type that represents the finance for that vehicle.

The remaining 4 finance boxes allow you to manually enter the details of the finance company supplying the finance along with the total amount for the loan, the term of the loan and the monthly repayments.

6. SODAN TAB (STATEMENT OF DEMANDS AND NEEDS)

NOTE: NOT ALL DEALERS WILL HAVE THIS TAB

On the next tab you will see 8 questions that help to establish the demands and needs of the customer. The answers to these questions are designed to select or exclude particular products that your dealership offers.



NOT AVAILABLE SYMBOL

Click YES to the first question. You will notice that the products at the top of the page with the exception of VPS / BMW ProtectX will all have "not available" symbol now.

Some products are not available due to age, mileage or usage restrictions.

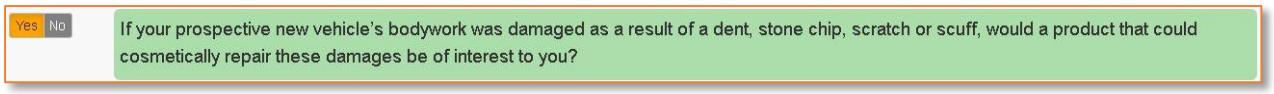
YELLOW STAR

Clicking NO will now show what products are recommended for sale as denoted by a yellow star. Some products may not be available based on the age or mileage of the vehicle being sold.

The options for available products change based on the SODAN answers. NOTE: *you do not have to answer these questions in order, as the list of available products will still be correct no matter which question is answered first but* **ALL questions must be answered.**

ANSWERING A SODAN QUESTION

Answering a question will highlight the answer in Green so that there is a visual indication the question has been answered whether it was answered yes or no.



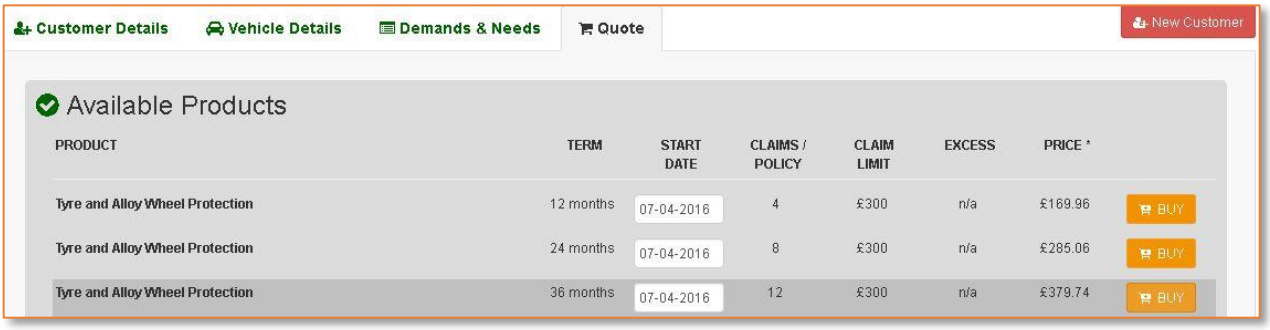
NOTE: *Not all dealers need the SODAN, in which case the buying process is exactly the same with the exception that all the products will be available straight away (subject to age & mileage). You can choose the products the customer wants & complete the customer & vehicle details tabs in which ever order you wish and click the Quote tab to purchase the desired products.*

SELECTED PRODUCTS

Click on the products the customer is interested in. If the customer does not want to purchase them at the time of sale you can click the “buy” button but do not confirm them. This will generate a quote for the products in the fulfillment documentation.

7. QUOTE TAB

If your dealership elects NOT to use this systems built in SODAN questions then ALL products that your dealership sells will be available otherwise the quote tab displays a list of the products that are recommended, available or not available based on the answers given in the SODAN questions *(subject to dealer),* age, usage & mileage of the vehicle.



GREEN TABS

Notice the customer details, vehicle details and demands & needs tabs have all turned Green. This indicates the tab is completed correctly & all the data is saved.

The Quote Tab will have 3 levels of products to show in separate areas.

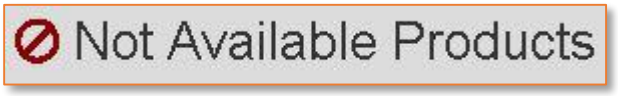
RECOMMEDED PRODUCTS

Are those which are recommended for this vehicle based on the age, mileage & use of the vehicle.

AVAILABLE PRODUCTS

Are those that are available immediately based on *(subject to dealer)* the answers from the SODAN questions.

NOT AVAILABLE PRODUCTS



Are those that, based on the answers from the SODAN questions or age, usage & mileage of the vehicle cannot be selected for purchase.

If the product is not shown in a separate Not Available Product area then hover your mouse over the "Not Available Products" symbol for an explanation as to why that particular product is not available for purchase.

DVP (DEALER VARIABLE PREMIUM)

Dealer variable premium is a means for some dealers to be able to adjust the sale price of a product. On the Available products page of the quote tab you will notice that the price boxes are in Red and the suggested retail price will show in the box.

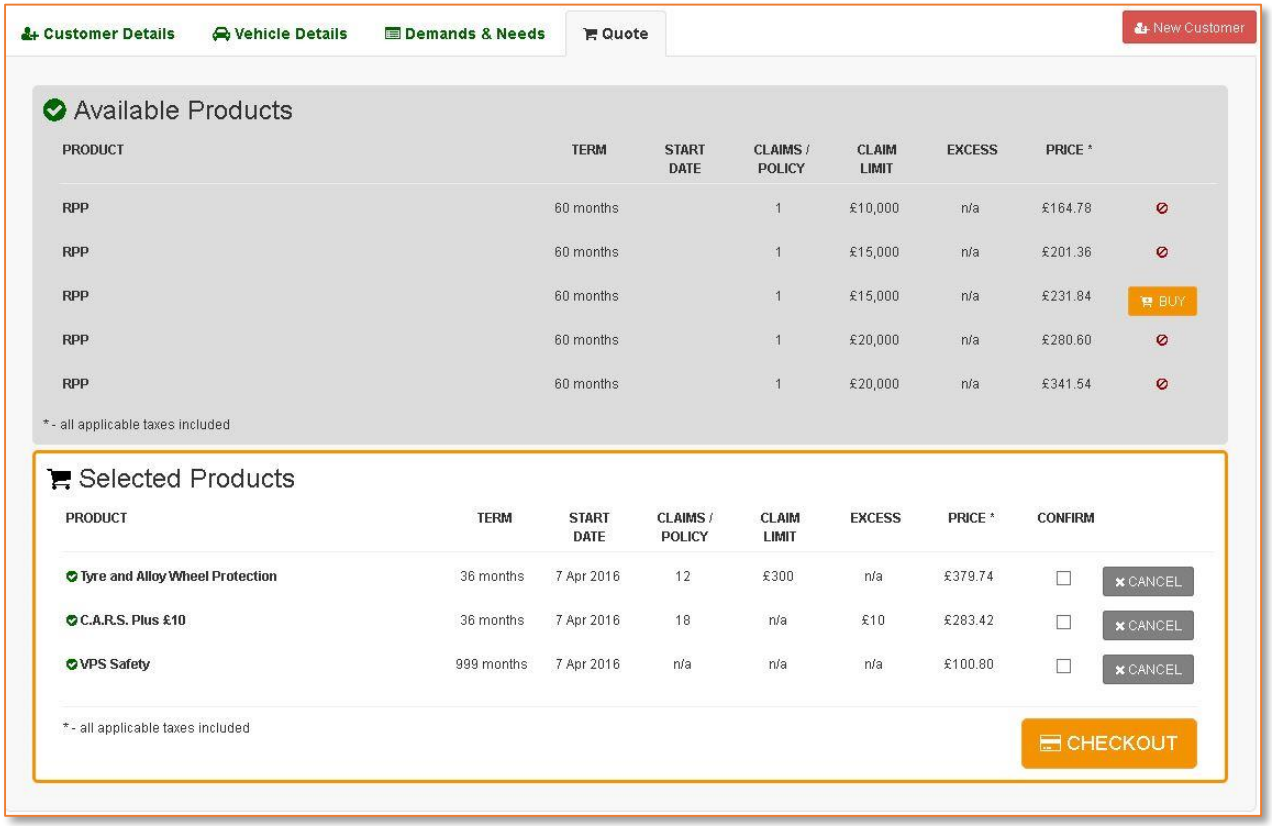
Hover the mouse over the red box for an indication of the lowest suggested selling price of the product. You can directly enter the price for the product into this box or use the arrow keys to adjust the price accordingly.

Once the price is entered the box turns Blue & the Orange buy button is available to be clicked to purchase the product.

THE BUY BUTTON

Click the "Buy" button to purchase a product.

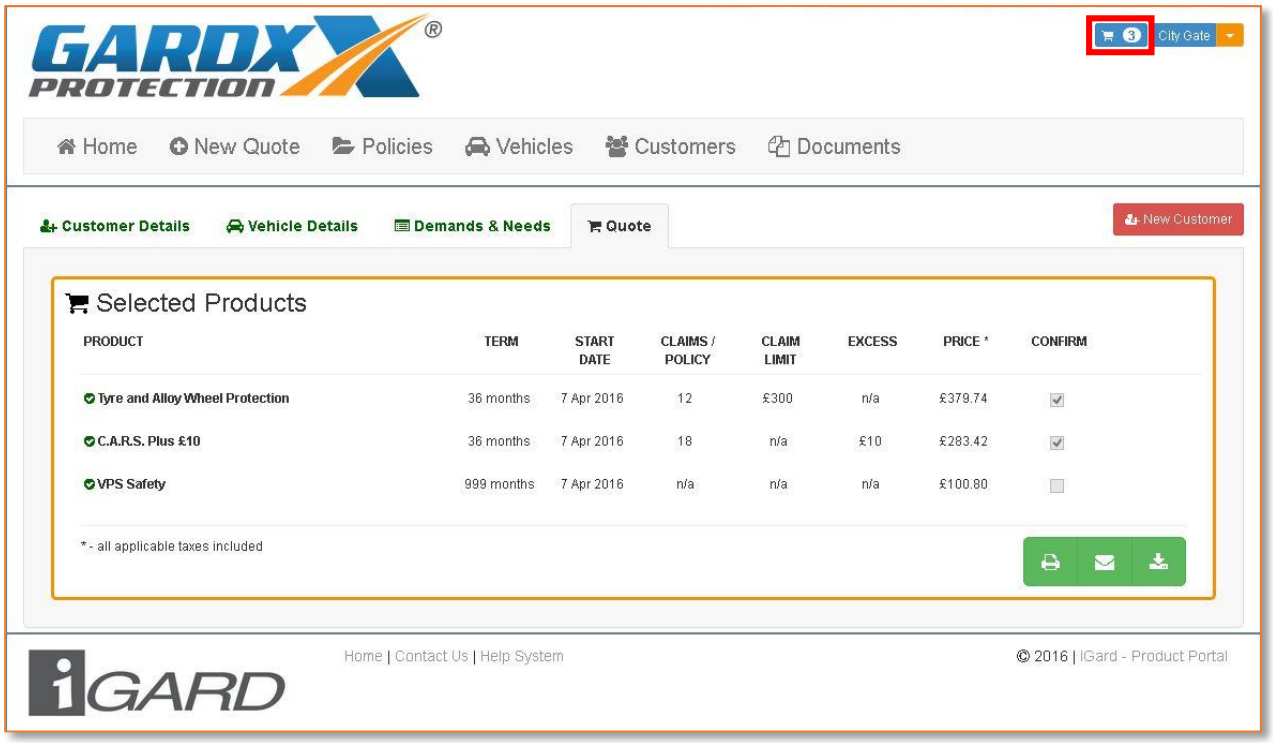
Once the buy button has been clicked the product is removed from the list of recommended / available products and is moved to the "Selected Products" box at the very bottom of the tab.



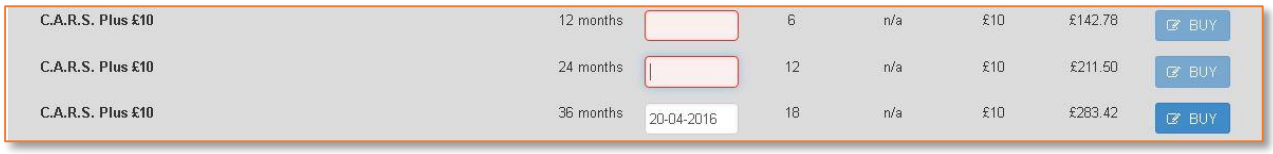
PURCHASED PRODUCTS LIST

The purchased products are shown in the "Selected Products" screen. This shows which of the purchased products that have been confirmed and not confirmed.

On the Selected Products screen you can see the checkout basket (red box – *top right of below image*) showing the items in the basket. The bought items are shown in the Selected products box with a checkmark in the confirm box.



You can also get to this page from the policies view if you want to add a previously unconfirmed purchase. Click on the Blue Edit button next to the corresponding Yellow Pending policy in the Policies tab then select the Blue "buy" button for the product the customer originally chose or add the delivery date to any red boxes for other products of different lengths (12, 24 or 36 months).

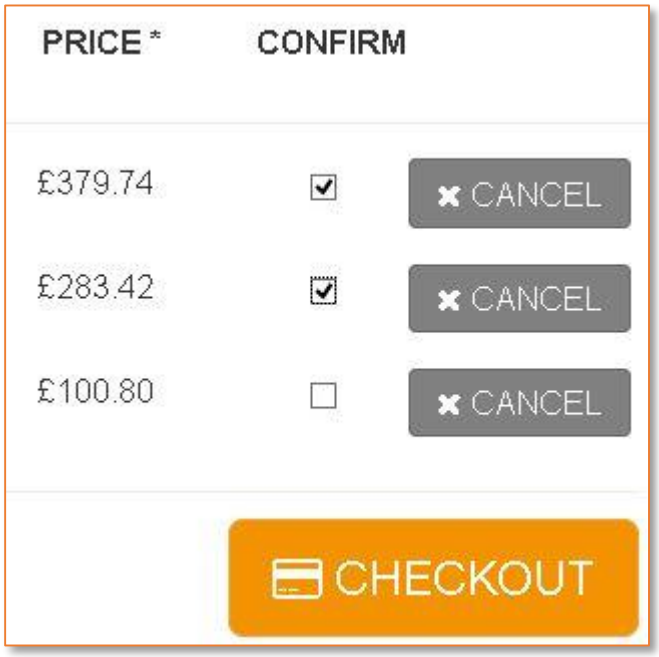


Pressing the Blue "Buy" will take you back to the SODAN questions (if applicable to your dealership). Click on the Quote button again then re choose the Blue "buy" button & you will get to the selected products screen where you can click confirm.

THE CONFIRM CHECKBOX

If the customer is sure of their purchases then click the "confirm" checkbox next to the price of the products and then the large Orange "Checkout" button.

Once you have clicked on the checkout button the customer's document fulfillment details will be displayed on the screen in a separate pop out box.



CUSTOMER FULFILLMENT DOCUMENTATION

Scroll through it to confirm all the purchased product information is there.

This should contain *(depending on products purchased)*

- A Customer Schedule *(for CARS Plus, Tyre & Alloy Wheel etc.)*
- An Insurance Quotation for GAP *(if a GAP product was purchased)*
- VPS cleaning instructions/guarantee *(if purchased)*

Both a Policy Summary and a Policy Certificate for each insured product that the customer has agreed upon and paid the necessary premium.

You can close the policy fulfillment documentation box but clicking the Orange "close "button in the top right hand corner. You can also print, download and open in a new window. The double arrow takes you to a small tools menu for the document.

Close

Page: 1 of 15 Automatic Zoom

Customer Schedule

GARDX PROTECTION

Customer Details

CUSTOMER:	Mr. Jason Smith	ADDRESS:	Flat 1, London Stanley Studios Park Walk
TELEPHONE:			
MOBILE:			
EMAIL:	wontfindme@gmail.com	POSTCODE:	SW10

Vehicle Details

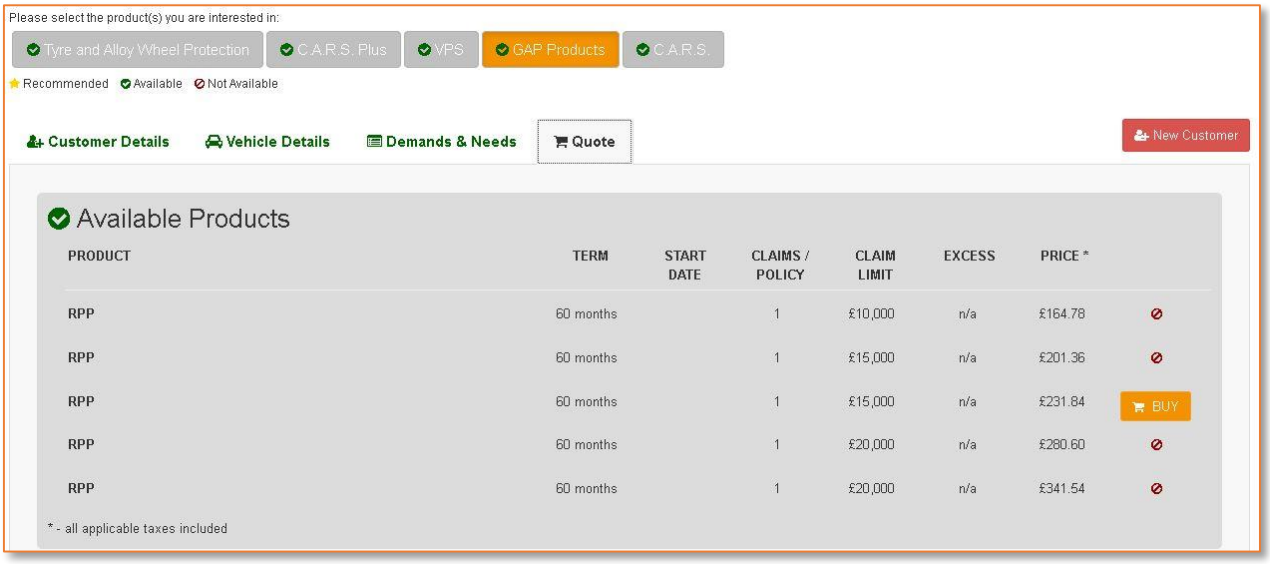
TYPE:	Car	FUEL TYPE:	Hybrid
VRM:	NA65LJJ	ENGINE CAPACITY:	1798
VIN NO:	JTDZS3EU60J004496	FIRST REGISTERED:	30-Nov-2015
MAKE:	TOYOTA	CURRENT MILEAGE:	4000
MODEL:	PRIUS+ EXCEL + CVT	PURCHASE PRICE:	£28,000.00
STYLE:	MPV	DELIVERY DATE:	07-Apr-2016

Product Details

POLICY NUMBER	POLICY TYPE	LIMITS	BENEFIT*	EXCESS	TERM	START	TAX	PRICE**
UQWCG-00000323	Tyre and Alloy Wheel Protection	4 / 12	£300	£0	36	07-Apr-2016	20%	£379.74
UQPCG-00000324	C.A.R.S. Plus £10	6 / 18	£0	£10	36	07-Apr-2016	20%	£283.42

8. GAP PRODUCTS

GAP products have the same process for buying as for the other products and can be done at the same time with only a little difference in the timeframe for actually approving the sale due to FCA requirements.

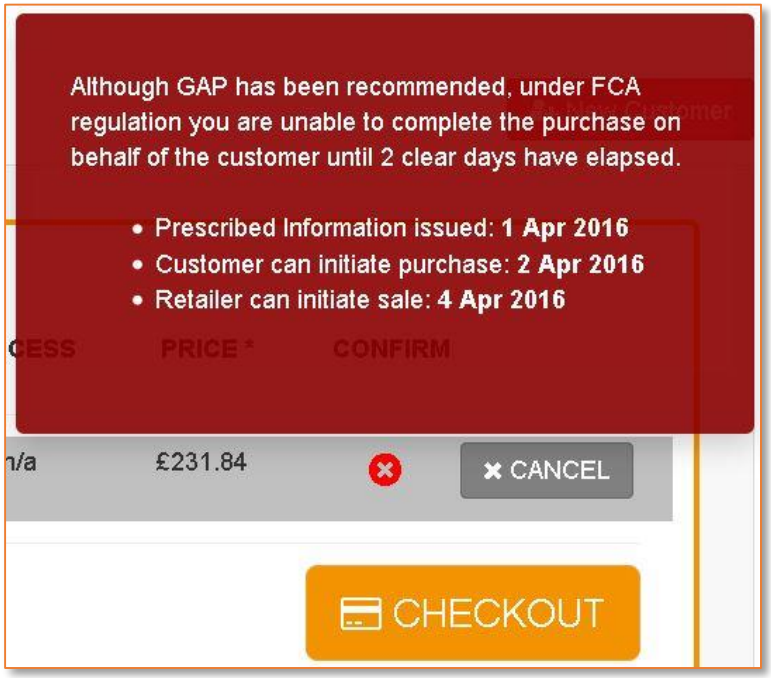


Choose the GAP product as you normally would any other product from the product list and click the Orange "Buy" button. In the selected products screen *(shown separately below without other products here for clarity)*

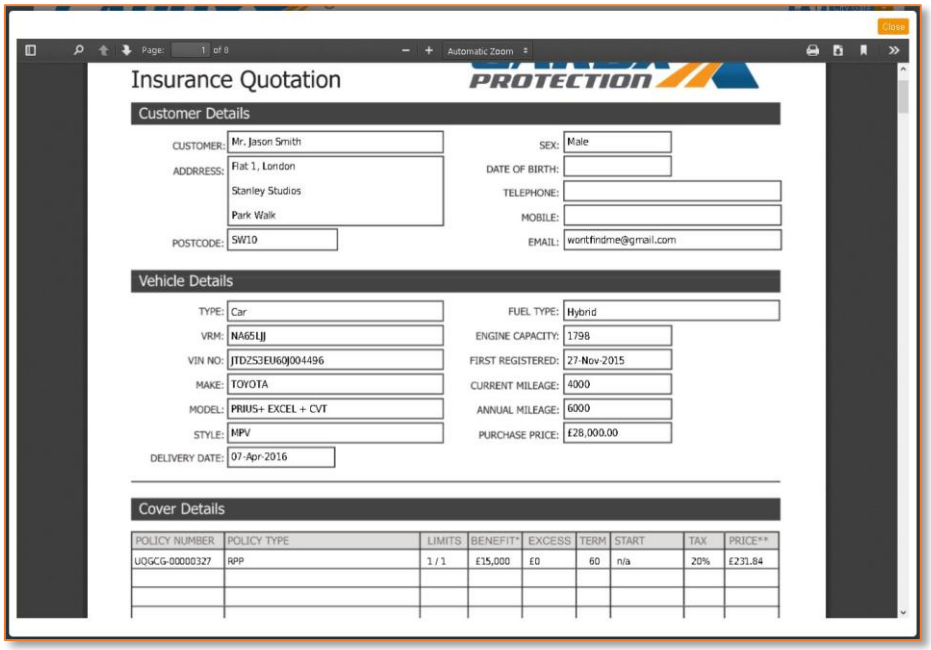
Notice that you cannot put a tick in the confirm checkbox. If you hover your mouse over the red circle with the white cross in it you will receive a warning box.

GAP FCA WARNING

The warning box tells you the time frame for the actual sale for the GAP policy. The reason for the delay is to give the customer the opportunity to look elsewhere for a GAP product.



The system will allow seller to initiate the sale on the 4th day. However, customer can initiate a purchase from the 2nd day on. Then you can click the checkout button and a quotation fulfillment document will be created, this can be printed or downloaded and emailed directly to the customer.

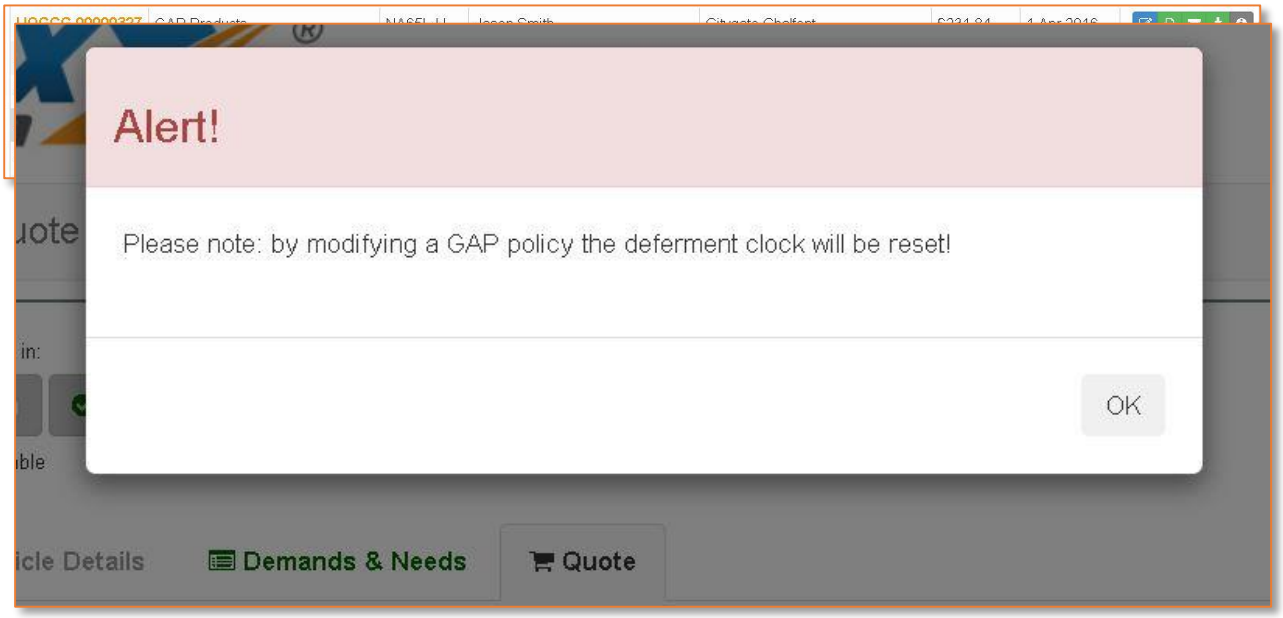


YELLOW & PURPLE GAP PRODUCTS

The GAP policy will show in Yellow in the Policies tab, the next working day it will change colour to Purple to indicate it is deferred policy ref the FCA deferral period.

RESETING THE DEFERRMENT CLOCK

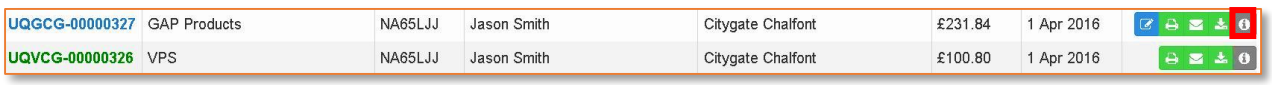
If you click the Blue edit button you will receive a warning advising any changes to the policy will reset the timer and you will have to wait longer before closing the sale.



Click OK & the back button on the browser to exit this warning if you do not wish to make changes otherwise continue with the changes and follow the same process for purchasing the GAP policy.

BLUE GAP PRODUCTS

After the elapsed time has finished you will see in the "Policies" page that the policy number is now **BLUE** (Eligible) and you can now continue with the Sale.



Click on the Grey Info button (**RED Square**) to take you to the info page and there you can click the Yellow confirm button

The policy will then show as Green in the policies tab and you will be able to Print or email the fulfillment documents to the customer from the relevant buttons.

RPP

ID	327	Policy Number	UQGCG-00000327	Price	£231.84
Sale Date		Inception Date		Expiry Date	
Claim Single Limit	£15,000.00	Claim Aggregate Limit	£16,500.00	Claims Annual Number	1
Term	60 month(s)	Installments Number	1	Excess	
Modified	1 Apr 2016	Confirmed		Cancelled	

TOYOTA PRIUS+ EXCEL + CVT

VRM	NA65LJJ	VIN	JTDZS3EU60J004496	Price	£28,000.00
Body Style	MPV	Colour	WHITE	Engine Capacity	1798
Odometer Reading	4000	Manufacture Year	2015		
Delivery Date	7 Apr 2016	First Registration	27 Nov 2015		

Mr.Jason Smith

Id Reg. No		VAT Reg. No			
Telephone		Mobile		Email	wontfindme@gmail.com
Postal Code	SW10	City/Town	London	Region	
Address	Flat 1 Stanley Studios Park Walk				

Edit | Confirm | Delete | Back

9. ADDING / BUYING PRODUCTS

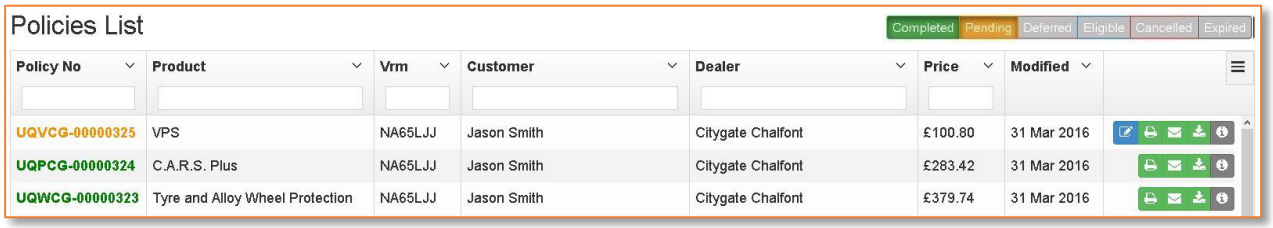
If only 2 of 3 selected products have actually been purchased you can select the final product via the Policies screen.

This will show you a list of all the policies currently on the system and they are colour coded for easy identification and filtering.

COLOUR CODED POLICIES

To filter the list based on policy status you simply click on the colour representing the items you do not want in view. So if all the colours are showing you will see all policies however if only the red colour is showing you will only see the Cancelled policies.

In the example below you can see there are 2 Green policies &1 Yellow.

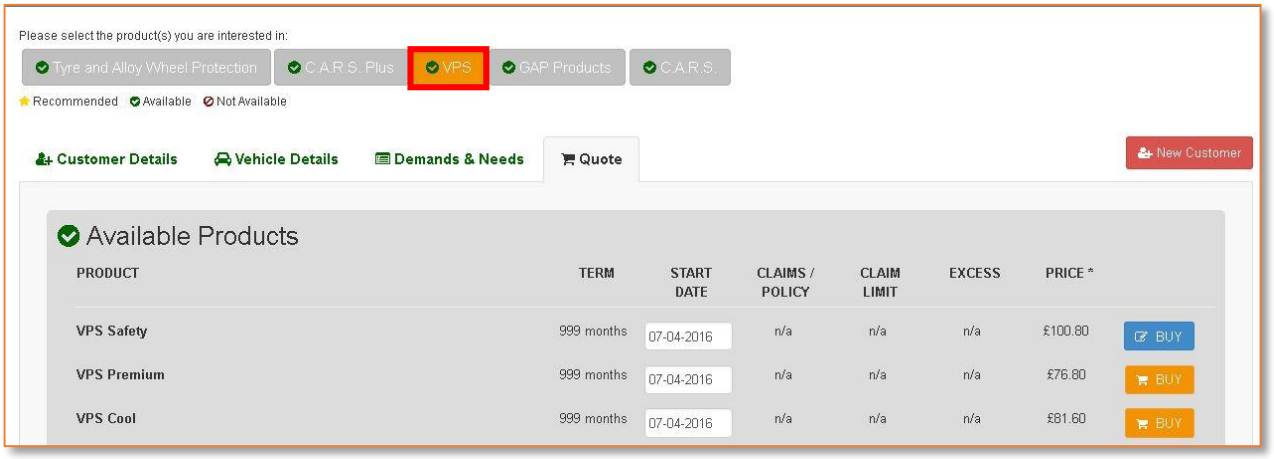


The 2 Green policy numbers are the products the customer already purchased by you ticking the “confirm” boxes & these are “Completed” purchases. The Yellow policy number is a “Pending” purchase.

BLUE EDIT BUTTON

To purchase any Pending policy click the blue edit button in the last column or the grey info button.

Pressing the blue edit button will take you back to the list of available products (**check the product you want to purchase is selected in the products list-Red box)** then press the Blue Buy button.

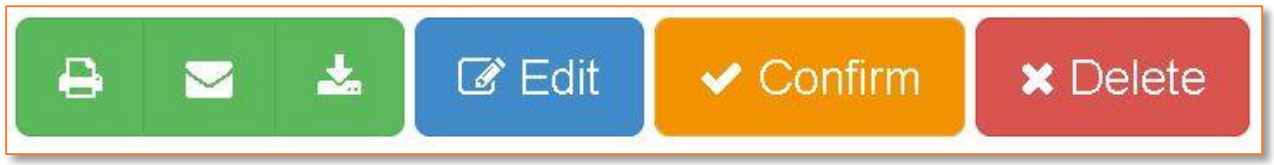


BLUE BUY BUTTON

Pressing the Blue buy button will take you to the selected products section and from there you can put a tick in the "confirm" checkbox to complete the purchase. Print, email or download the fulfillment details for the customer to have a copy.

GREY INFO BUTTON

Pressing the Grey "Info" button will present you with a details page with info of the product, Vehicle & Customer. At the bottom of this page you will find the Blue edit button and pressing this will take you to the Available products page and you follow the same steps as above.



CONFIRM BUTTON

Alternatively for pending policies (Yellow) you can press the confirm button & this will confirm the purchase immediately & the customer schedule will show on the screen.

DOCUMENT. PRINT, EMAIL & DOWNLOAD

The Green buttons allow you to Print, email to any email address or download to the computer you are using the fulfillment documentation. This gives you 3 different options by which to give the customer the required documentation for the policies they have purchased.

EXTRA PURCHASES AFTER INITIAL PURCHASE

If a customer has purchased VPS and C.A.R.S PLUS, then a few days later decided to purchase Complete Tyre & Wheel you can click on the Blue Edit button on the pending policy for that customer to open the Available Products page and follow the steps as for "The Buy Button" OR click the Grey Info button & then click the confirm button.

Pending Policies are Yellow in the Policies Tab,

If however there are not any pending policies, any further purchases will be dealt with as a new product purchase and you can load their customer and vehicle data using the copy button then proceed to the Quote tab and follow the process in the same way.

10. CANCELLING PENDING (YELLOW) POLICIES

If a customer should want to cancel a policy they have recently purchased but have not yet been confirmed, find the Yellow policy in the policies tab under the customer name and click on the Grey Info button.

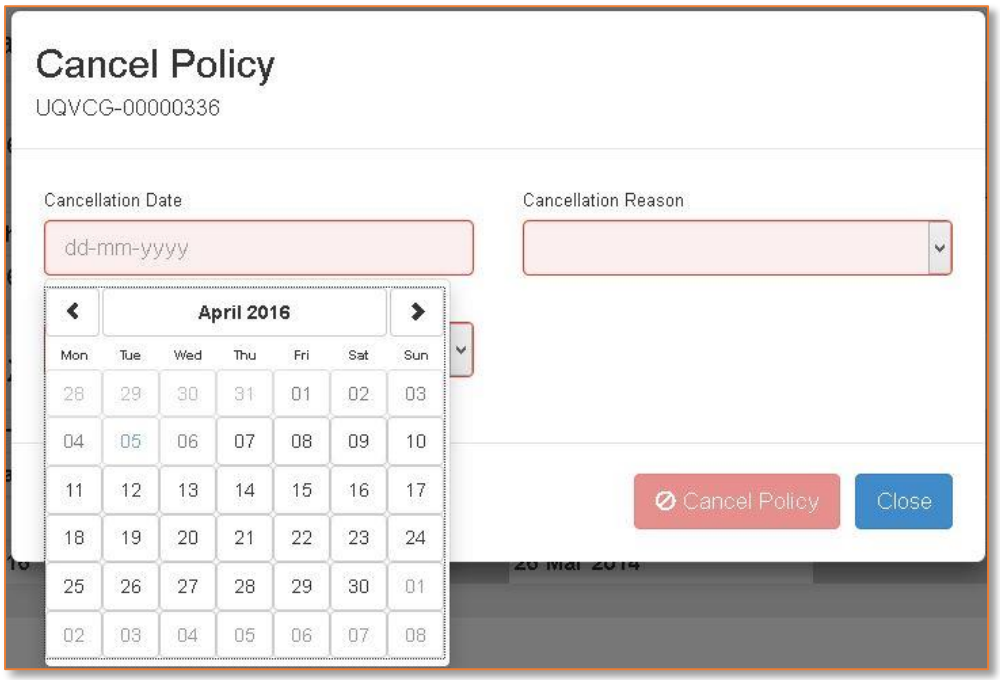
Clicking this will take you to the Info page and at the bottom are a set of button of which the cancel button is one of them.

CANCELLATION BOXES

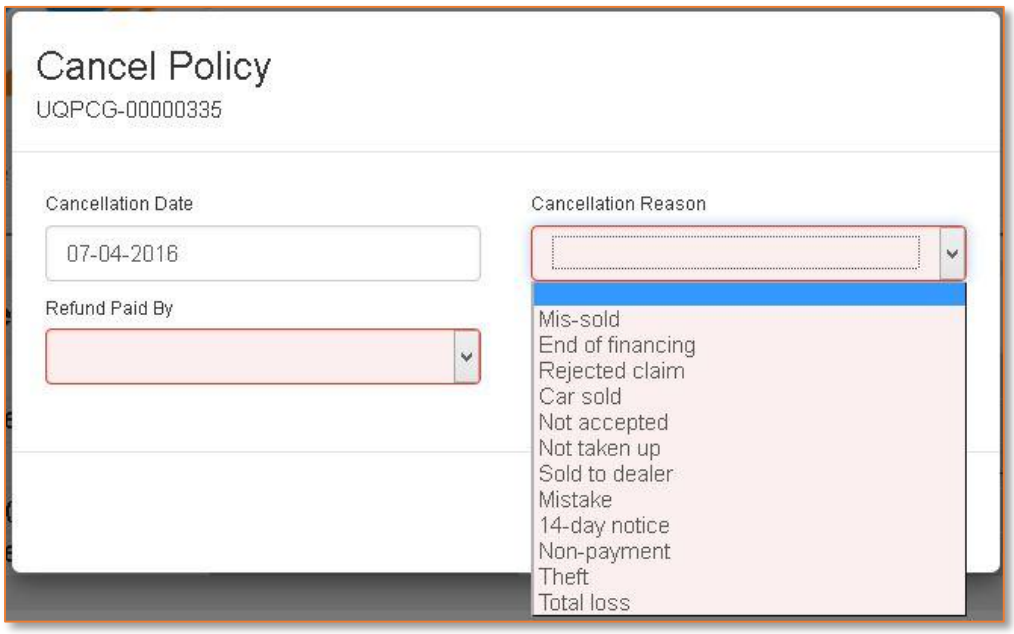
Clicking this will present you with 3 boxes that need to be completed before a policy can be cancelled.

- A cancellation Date
- A cancellation Reason
- Who will be refunding the premium

Enter the date that you wish to cancel the policy from.



Next choose a reason from the drop down menu as to why the policy needs to be cancelled.

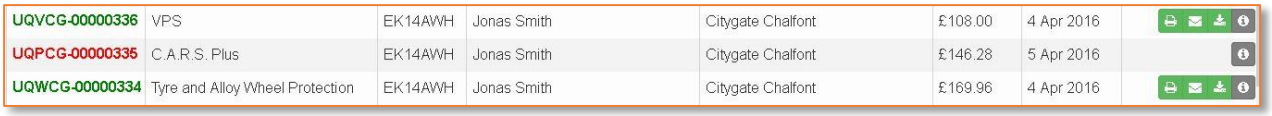


Lastly enter from the dropdown list who is to pay the refund. If the customer has cancelled within the cooling off period *(14 days for most policies)* then it will be the Dealer that will pay the refund.

Outside of the cooling off period it will be the insurer who will refund the customer.

11. CANCELLING CONFIRMED (GREEN) POLICIES

Find the Green policy in the policies tab, click the Grey info button and again click the Red Cancel button at the bottom of the screen and complete the 3 boxes *(Date, Reason & Who pays)*.



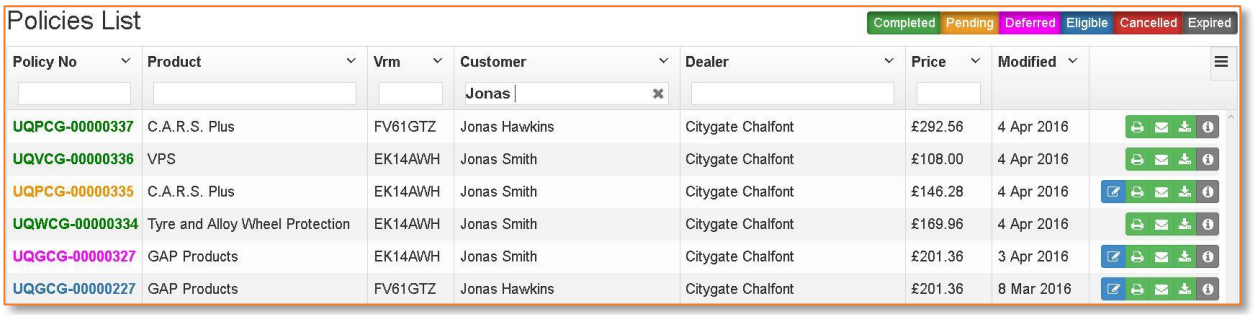
UQVCG-00000336	VPS	EK14AWH	Jonas Smith	Citygate Chalfont	£108.00	4 Apr 2016	
UQPCG-00000335	C.A.R.S. Plus	EK14AWH	Jonas Smith	Citygate Chalfont	£146.28	5 Apr 2016	
UQWCG-00000334	Tyre and Alloy Wheel Protection	EK14AWH	Jonas Smith	Citygate Chalfont	£169.96	4 Apr 2016	

The cancelled policy shows up Red in the policies tab once cancelled & only the info button is available for that policy.

NOTE: You have 24 hours from purchase to cancel a policy after that only Admin can cancel a policy.

12. **USING THE SEARCH BARS**

The search bars on the Policies, Vehicles & Customers buttons are live which means they update the results as you type the details into them.

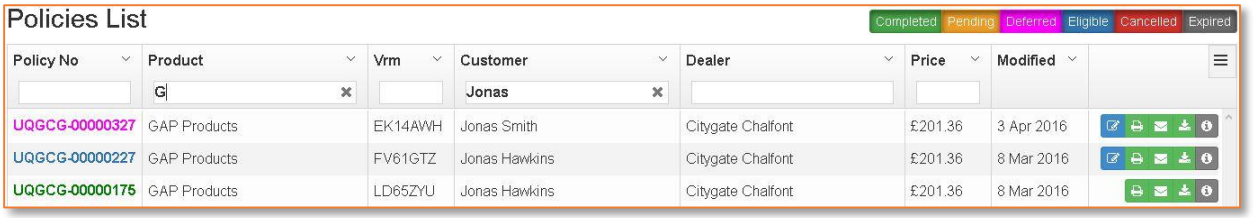


SEARCH FUNCTION

The search function in the policies tab starts with the first letter & moves forward from there. You can see here all customers with the first name of Jonas are listed so if you added the letter H after, then all customers' names going forward from Jonas H will be displayed.

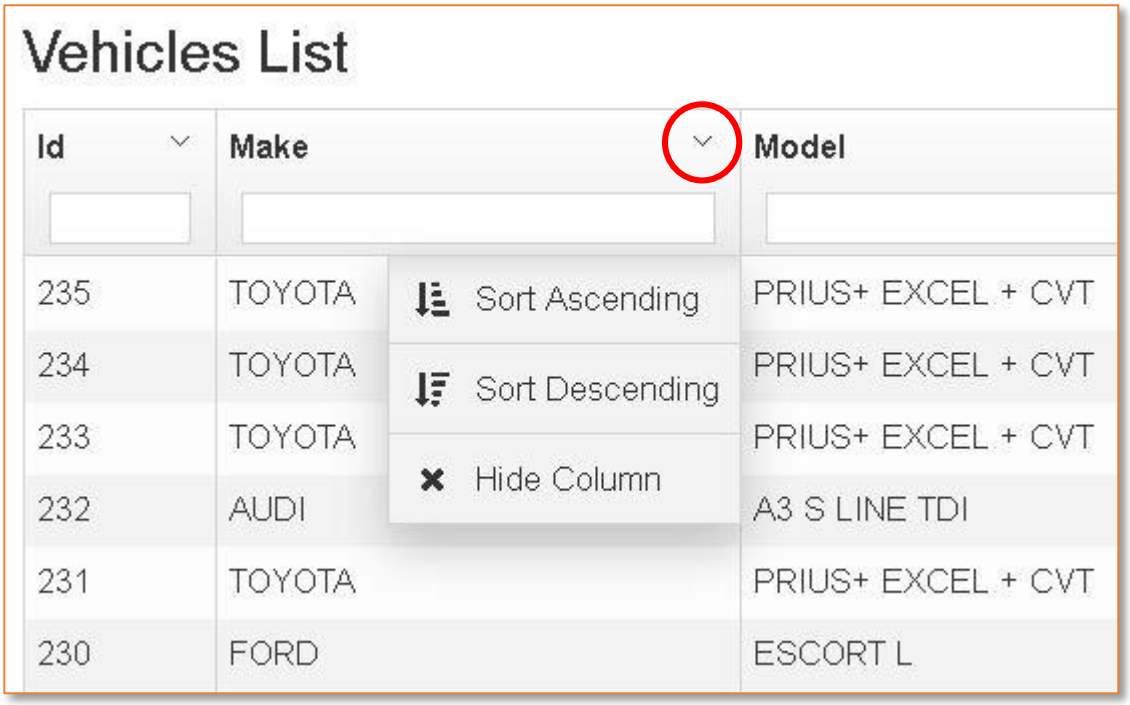
Here we extended the search criteria to target specifically GAP products purchased by customers called Jonas by adding the letter G to the product search box.

Narrow the search further by the addition of a surname or even add the policy number directly if you have it.



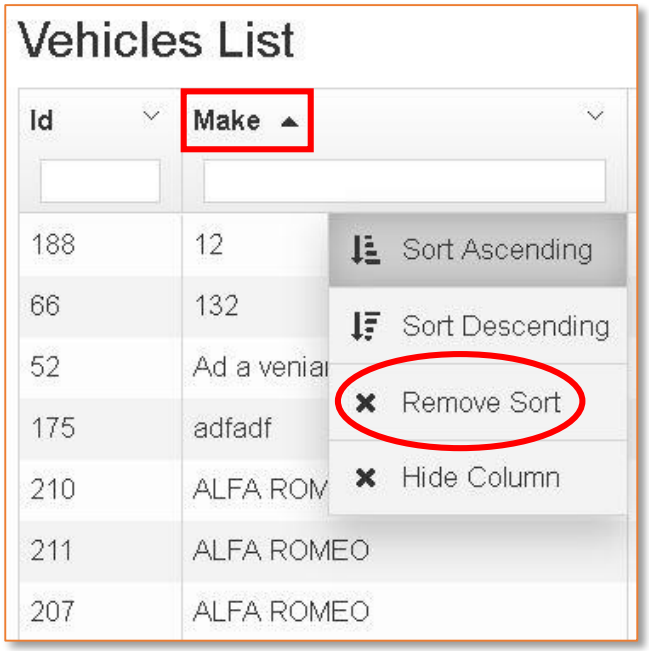
ASCENDING / DESCENDING SEARCH ORDER

There are more customizable options for the search bars which allow you to sort the order of your results either in ascending or descending order by clicking on the small arrow head (**Red Circle**).



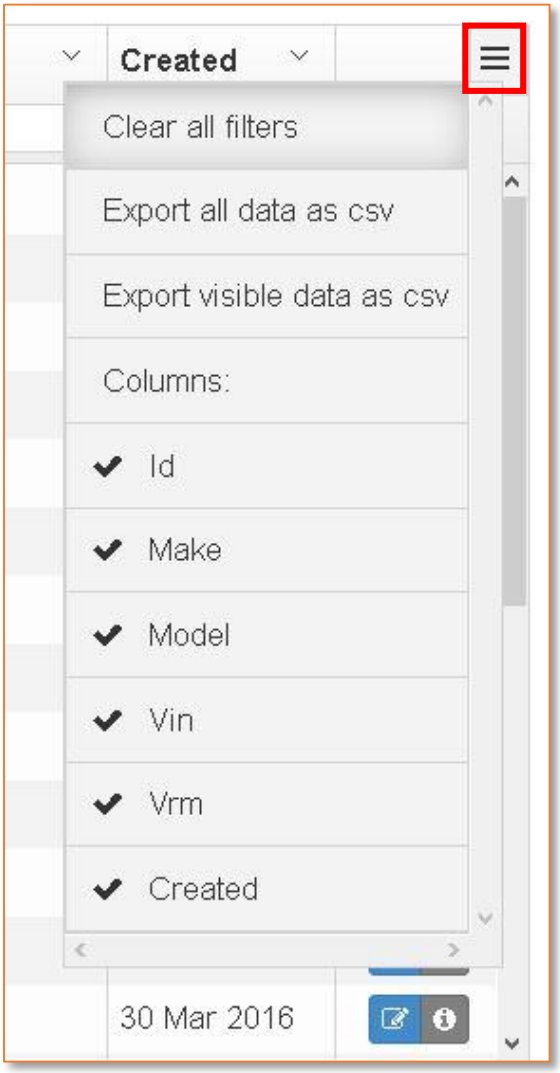
By clicking on the name in some of the columns (**Red Box**) you will see a small solid filled arrow head appear. Clicking on this will enable you to quickly change the order of the list from ascending / descending.

To cancel this click the "Remove sort" from the drop down menu. (**Red Oval**)



SHOW / HIDE COLUMNS

There is also the ability to show/hide any of the columns, clear all filters and export all or only visible data in a CSV format.



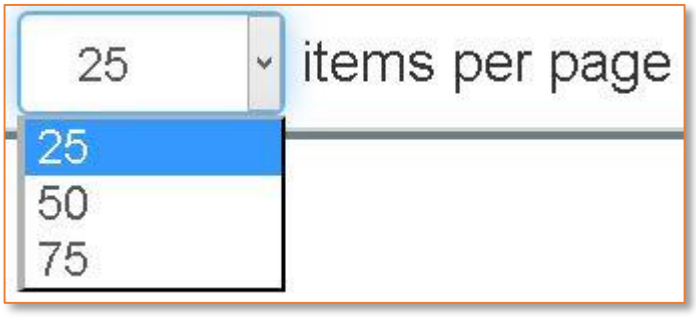
Click on the small square with the 3 lines in it (**Red Box**) on the right hand side of the search bar. This will show a dropdown list & from here you can select and deselect the columns you wish to display.

NOTE: *This only stays in this format whilst you are on the page. Navigating away to a different page and then returning will mean* ***ALL*** *columns will be displayed again.*

JUMP BUTTONS

At the very bottom of the page are the "Jump to" buttons. These are used for

jumping to the end/beginning of ALL the pages of data or forward/back a page at a time or you can manually enter the page number to go straight to that page.



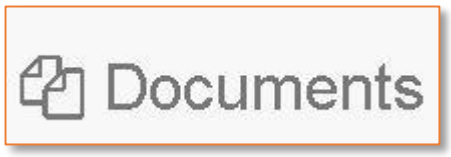
Next to the Jump buttons is the items per page display dropdown box.

25, 50 or 75 items per page are available.

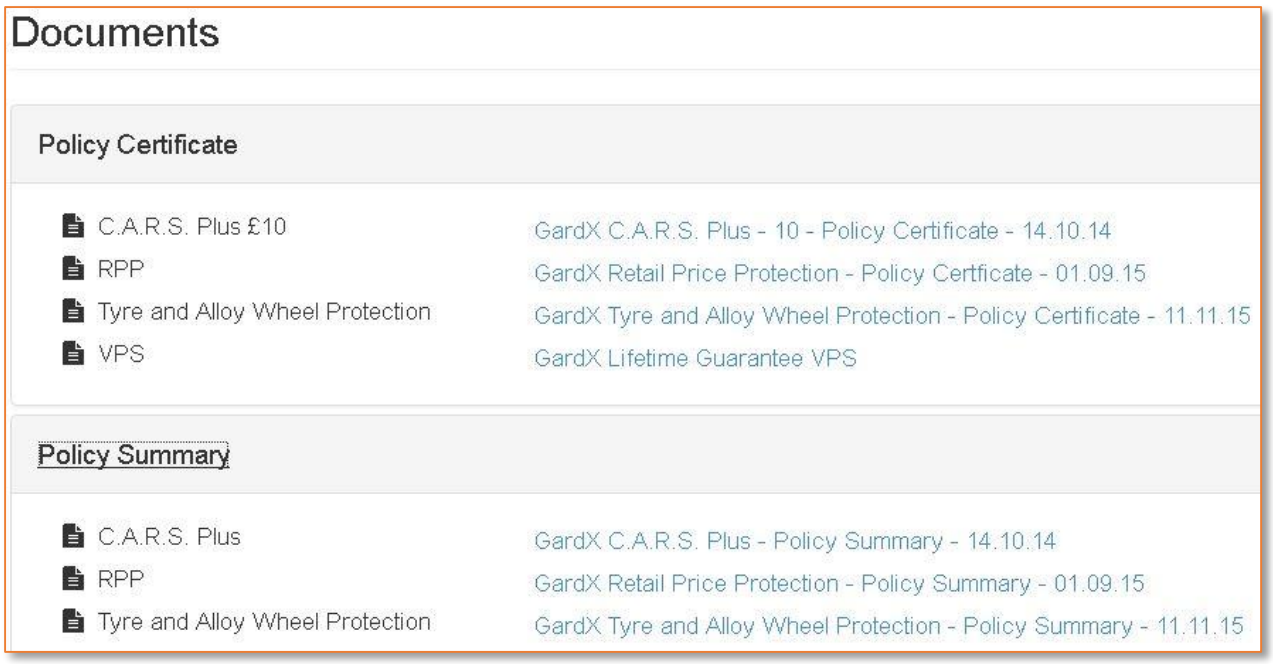
On the very far right of the page there is the number of items currently in view on the page along with the total number of items. Here is shown 1 to 25 but if you choose 75 it will change and you would use the mouse wheel or right hand scroll bar to scroll through the list.

All the search bars for Policies, Vehicles and Customers work in the same way with just differences as to what columns can have the ascending/descending order changed

13. **DOCUMENTS TAB**



The Documents button takes you to a page where you can view either the policy summaries or the policy certificates for all the GardX products that your dealership offers to its customers.

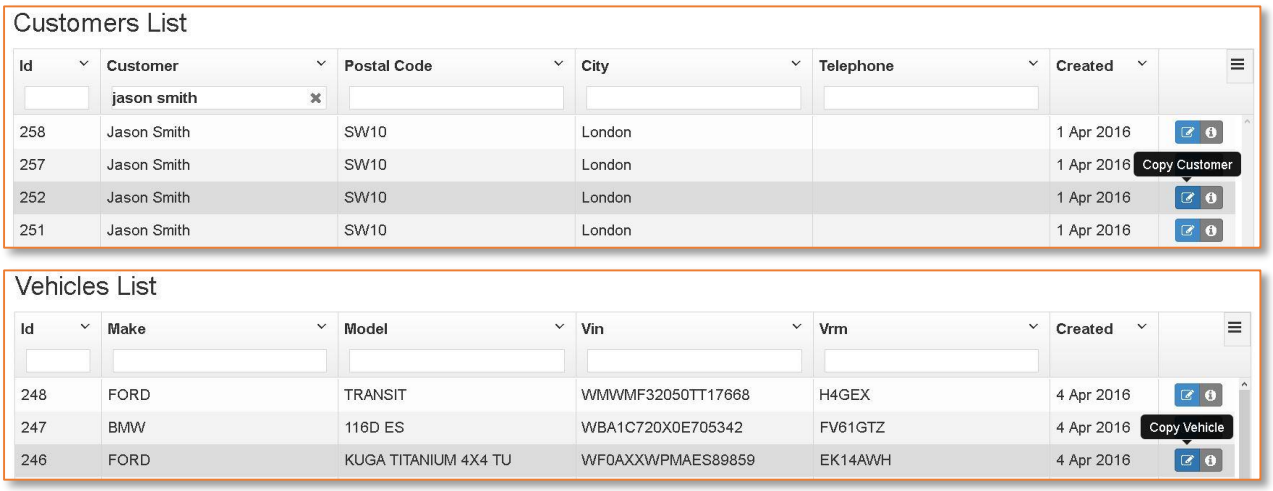


These will always be the latest documents for these products.

14. COPYING DATA

(REPOPULATING CUSTOMER & VEHICLE PAGES)

There may be a time when you need to re populate the customer and vehicle tabs with previously entered information. The quickest way to do this is to find the customer or vehicle details you wish to copy in the relevant tabs and click the Blue edit button. You will see if you hover your mouse over the button it will show you what it does.



When you do click the Blue edit button the information is instantly copied to the relevant tab. The information that has now been entered in the Customer or Vehicle tabs is editable so can be changed if need be.

IDLE TOO LONG

If you are logged into the system but have not been active for a while the system will display a notification advising that you are idle.

If you do nothing the system will automatically log you out and display a message to advise you.

Simply refresh the browser and log back in.

If you want to continue then press any button and you will be asked if you want to leave the current page.

Say yes and you will be taken back into the system and can continue.

Frequently asked questions

- **I don't have any user login details**

  Speak to your business manager for the required details

- **The address is not found by the PCA predict**

  You can manually enter the information in the address boxes.

- **There is no start date shown in the available products**

  You have not completed the delivery date in the vehicle details tab (the tab will not be coloured green either)

- **On the quote tab it states "no products selected"**
  Simply click on the product that you want to add & the "Available products" box will appear listing the products you have chosen.
- **The customer details, vehicle details or demands & needs tabs are not green. Why?**
  This means the information in the corresponding tab is incomplete and will not be saved. Go back to the tab and check all the information is entered correctly.
- **Why can I not pick a delivery date beyond 7 days from time of setup**
  This may be changed in the future but was deemed an acceptable delivery time.

IGARD PROPRIETORY SOFTWARE

USER GUIDE