





Valuation Anywhere Quick Start Guide





Quick Start Guide

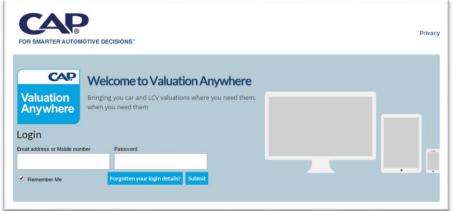
This document provides an overview of some of the key features of the Valuation Anywhere tool.

Valuation Anywhere is a web based tool which offers the ability to perform a VRM lookup to aid identification of the vehicle and provide accurate values wherever you want and whenever you need, subject to your mobile/internet provider's network coverage.

It can be used via the web or email on your pc or web enabled mobile phone, or via SMS. Valuations can also be obtained via the web without the VRM lookup facility. Valuation Anywhere can be used to value both Cars & Light Commercial vehicles subject to subscription.

Login & Registration Details

When you first subscribe to Valuation Anywhere, our Customer Support team will create the initial user on your behalf and will email you with the login details.



This user has full admin rights and will be required to accept our Terms & Conditions before proceeding. Please take the time to read these carefully.

The mobile phone number and email address registered to your subscription will be authorised to value either by **SMS** or **EMAIL**.

Tick the box to

remember your user name. If you have forgotten

your password, click on the link and enter your email address or mobile to request a reminder.



Editorials

Valuation Anywhere now includes access to our full editorials as well as the bite size commentary available with Black Book LIVE and Black Book Plus.

From the main valuation page, click on the CAR, Commercial or Motobikes buttons as required and you will be directed to our main editorial section on www.cap.co.uk.





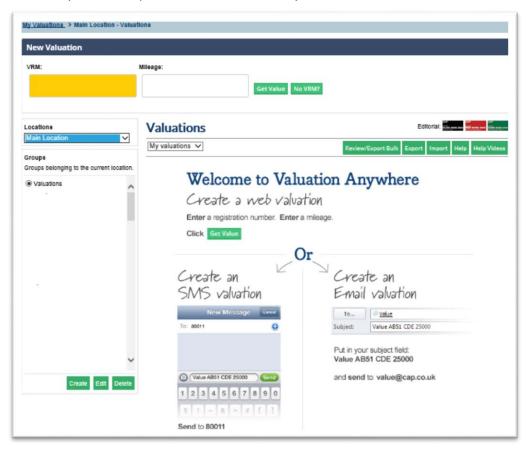
Before you start to value....

Valuation Anywhere not only provides vehicle values, but gives you the option to view technical data, standard equipment and optional equipment information as well as the ability to perform vehicle appraisals and personalise and print the vehicle valuation.

You may want to adjust some of the settings in MY PROFILE if you want to look up and value the customer's vehicle while in front of them and show them the pre-selected default valuation (clean, average, below).

If you are an Administrator, you also have the ability to create additional users (subject to appropriate licence) and define each user's permissions

The next few sections will help you set up your personalised valuation and vehicle pages, to enhance your usage and experience of your subscription to CAP Valuation Anywhere.



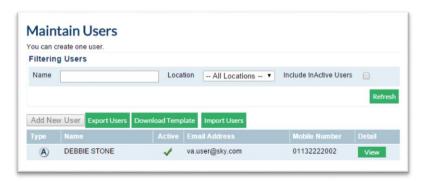


Admin

From the Admin tab, you can maintain Users, Appraisal Settings, Subscriber Settings, and run User reports. (Subject to Adminstrator permissions)



Maintain Users



If your subscription allows multiple users, you can add and manage them in this section.

Click ADD NEW USER to add additional users, or if you prefer you can download the template and import your users.

If you already have multiple users set up you can use the filter function to search for names by location if set. (See Subscriber Settings)



When creating a new user you can allocate them to a location if appropriate. This will allow you to group users together by location or brand if required.

There are also a number of options you can allocate at Administrator and User level.

Select as required and click SAVE.



Subscriber Settings

Use the subscriber settings to define preferred mileage adjustment for Black Book Plus (subject to appropriate subscription) and create and maintain "LOCATIONS".

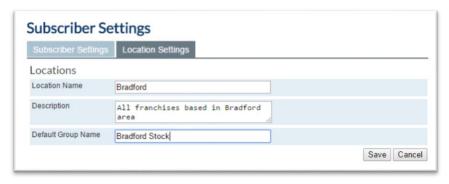
Subscriber

Use the Black Book Mode to define how Black Book Plus should adjust

valuations & mileages in-line with the 3 month forecast.

Subscriber Settings Subscriber Subscriber Black Book Plus Normal - calculate values with given mileage Automatic - system will increment mileage based on car age and current mileage Manual - user can enter a mileage step to increment per month on the valuation page Default Mileage For manual increments Update Settings

Locations

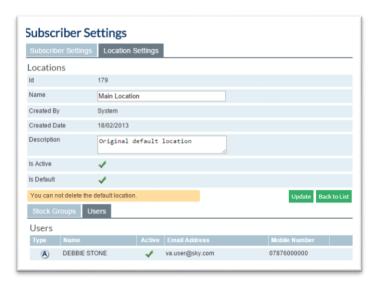


Use the Location settings to create additional locations as required.

Click **Add Location** to create new location,

Or **View** to see details and users attached to a location.







Appraisal Settings

Valuation Anywhere includes the ability to adjust the valuation based on the vehicle's appraisal.

The application comes with pre-set Body Work & Appraisal items and adjustments, which you can add to or amend as required.

Click <u>Add new item</u> to add new items to body work adjustments or appraisal adjustments and save each item as adding.

To amend any existing items click on the pencil icon and amend as required.



User Reports

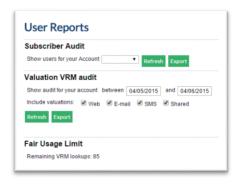
Subscriber Audit - Use this report to audit users set up on your account. Use the drop down option to select Active or In Active users.

Valuation VRM audit – Use this report to audit valuation activity on your account.

Click **Refresh** to view online or **Export** to produce a CVS file.

You can also view the number of lookups remaining within your allowance.

See Fair Usage VRM lookups for more information.



My Profile (Click on the settings icon in the top right hand corner to access My Profile section)
Use this section to view and change the phone number and email address used to create your account.

NOTE: Your email or mobile number can be used as your login user name, but also the registered details applicable to SMS/Email valuations for your account so should be updated accordingly to continue using these services.







Valuations Summary List

Choose which valuation conditions to display and how many historical values you wish to display and for how long.

Valuation Screen Customisation

Use this section to decide which values you wish to display and select the default condition you wish to use for valuations.

NOTE - If you change the default condition, it will only take effect on any new valuations produced. It will not change an existing clean value to average, for example.

<u>Black Book LIVE</u> subscribers can choose whether to display Monthly value only, LIVE values only, or both.

You can also change your password to something more memorable if required.

Now you can value! Here's how....



VALUE via SMS

Simply create a text message on your mobile phone with the following message:

"VALUE" (space) "RegNo" (space) "Mileage"

- ensuring you put a space between the "words" and no spaces between the registration number and no commas in the mileage.

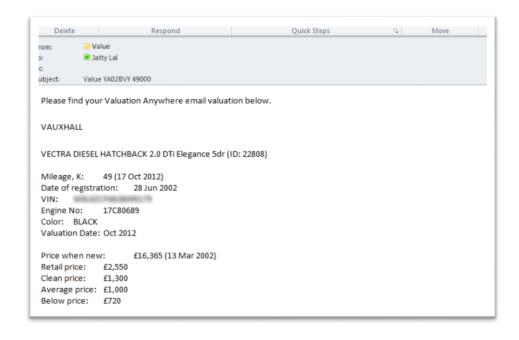


Send to **80011**

You will receive a reply almost instantly with the valuation. (subject to your network provider service).

Value via Email

Create an email with the same details as shown above in the subject bar and email to VALUE@CAP.CO.UK and you will receive an email reply almost instantly with your valuation.





Value on your Web Enabled Phone or Tablet



Browse to www.valuationanywhere.co.uk, from the login page click on the arrow at the bottom middle of the screen (IPhone – other phone or tablets may be different).



From the options available Add to Home Screen.

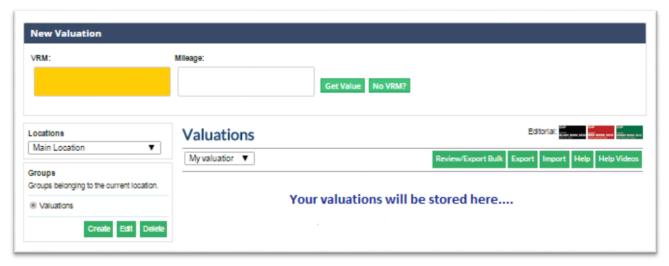




Value on your PC

Browse to www.valuationanywhere.co.uk and login with details provided by the Customer Support team.

Upon logging in, you will see the MY VALUATIONS screen.



As you create valuations, they will be stored on this screen for future reference, which you can access and amend as required.

Before creating a valuation, selection Location if applicable (and permissions allow). You can also create **groups** of valuations within a location. For example – P/Ex Stock



To create a valuation, enter the VRM and full mileage (without commas) and hit GET VALUE.

If you do not have a VRM and would like to value a generic vehicle, hit the **No VRM** button to go to the Manual Lookup option.



If the VRM is not found, the application provides the option to go straight to the **Manual Look** option.



Alternative Derivatives

Possible alternative derivatives may be provided if there is a direct match to the VRM, but there is also the possibility that other CAP derivatives are valid; examples of this are 'pack models'. This is where CAP has created alternative models for specific pack options.

This allows the user to make a choice and select the appropriate CAP derivative.

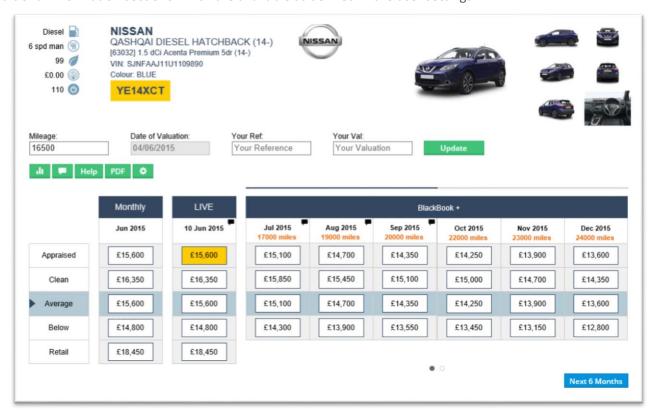
At any stage of the vehicle selection process you are required to confirm the vehicle details before proceeding to the Valuation page.

You also have the opportunity to add a reference to the vehicle at this point.



Valuation Details

Upon selection and confirmation of the vehicle, the vehicle and valuation details will be displayed, along with additional information sections which are available as defined in the user settings.



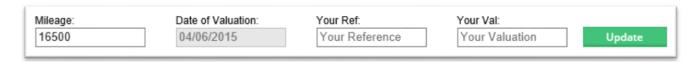


The values displayed in the section can be restricted from view in the user settings, along with the additional information tabs, which will be described in more detail over the next few pages.

If your Valuation Anywhere subscription includes Black Book LIVE and Black Book+12 values, you can view the commentary simply by hovering your mouse over the

2	Click this icon to refresh the values to the latest available data.	.lı	Click this icon to view the graph summary
-	Click this icon to view all commentaries	Help	Click this icon to access the Help Centre, including Help Videos
PDF	Click this icon to create the <u>Valuation PDF</u>	#	Click this icon to amend the Black Book+12 Mileage settings.

The main valuation section shows all values available for the vehicle selection, (subject to appropriate licence).



There is also a section to enter your own valuation should you have a different view.

The valuations displayed and own valuation section can be restricted by user settings as determined by your administrator.



The user can choose the default condition the value is based on in MY PROFILE, but if user settings permit multiple valuations can select required condition for the individual valuation, by clicking on the condition label.

TCO Lite

Use the Total Cost of Ownership (TCO) tool so that you can help your customers understand, with at-a-glance information, how much a car actually costs to run.

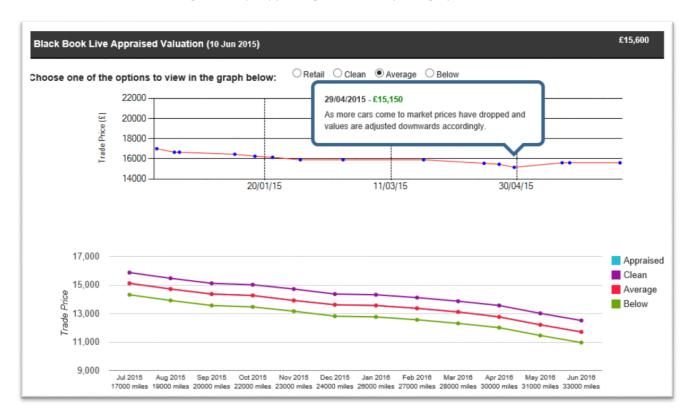


With 'overall running costs', 'the level of depreciation' and 'on-going service costs' seen as the three most important factors to a consumer, CAP's new TCO tool provides the intelligence to satisfy these queries, helping bring information-hungry customers together with the best dealers.



Valuation

The valuation section allows the user to view all vehicle condition values permitted by user settings, <u>Black Book LIVE</u> and <u>Black Book Plus</u> along with any supporting commentary and graphs.



This section can be restricted from view in the user settings.

Black Book LIVE

If your subscription includes Black Book LIVE, you will have access to valuation updates as they happen, supported by editorial commentary explaining the logic behind the changes, giving you significant competitive advantage when identifying which vehicles to buy and the price to pay throughout the whole month.

Click **here** for more information on Black Book LIVE

Black Book Plus

If your subscription includes Black Book Plus, not only can you view 4 month history of the vehicle, you can also view expected values over the next 3 months* which is supported by editorial commentary. The default mileage for each month forecast is as specified at valuation point, but you can choose to change to incremental increase via the icon on the main valuation page.

Click here for more information on Black Book Plus



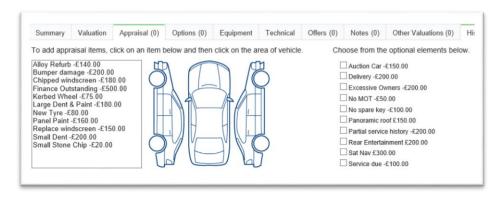
Appraisal

The Appraisal section allows the user to adjust the vehicle value through the appraisal process.

If bodywork appraisal is required, select the item and click on appropriate vehicle panel to adjust.

Tick to select other optional elements from the list.

When selected, the number of appraisal items added will be shown on the tab.



The appraisal items & optional elements and values are **examples only** and can be maintained by an appropriate user as described in the <u>ADMIN</u> section.

The optional elements list contains some pre-set general items that could affect the vehicle value. These items are **examples only** and the prices displayed are **NOT** the Cost New price for that particular item. See 'OPTIONS' to view list of options and cost that may have been available on the vehicle.

This section can be restricted from view in the user settings.

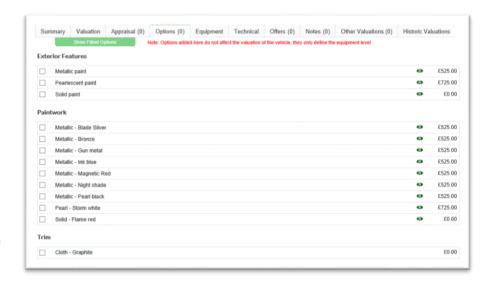
Options

This section allows the user to verify the configurable options & original prices available on the selected vehicle at the time it was registered.

Options selected will increase the original vehicle price on the summary page as guidance as to what the MMRP when originally purchased.

When selected, the number of options added will be shown on the tab.

Options selected will not affect the current valuation.



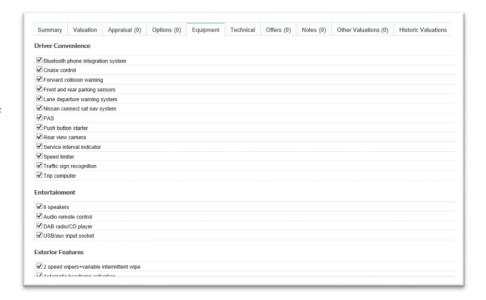


Equipment

This section displays all items of equipment that were factory standard at the time the vehicle was registered.

Standard Equipment items cannot be deselected at point of order, but could have been removed and replaced by users own favoured equipment.

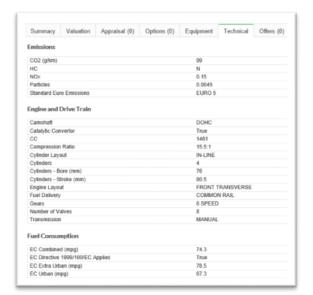
This would be verified at appraisal and can be indicated on this section.



Technical

This section displays all items of technical data applicable to the vehicle.

The items on this page are static and cannot be removed.



Offers

This section allows you to record the customer details, add the offer made for the part-ex valuation, giving the ability to provide the customer with a personal part-ex quotation. There is also space to add extra notes for the customer's information. Tick field to flag the deal as being accepted, along with a free text 'STATUS' field.

The number of offers added will be shown on the tab.

This section can be restricted from view in the user settings.

Offers					
There are no offers for this valuation record.					
Add a new offe	и				
date	description		price		
Address: Town/City:		Email: Note:			
County:					
Postcode:					
Telephone:					
Mobile:					



Notes

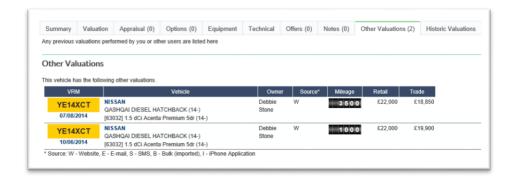
This section offers the ability to record additional notes to the vehicle record that is intended for internal use only.

This section can be restricted from view in the user settings.



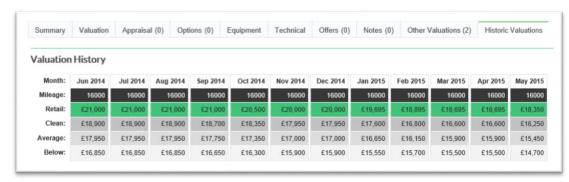
Other Valuations

This section allows you view any previous valuations you (or your group) have performed for this vehicle, whether the valuation has been performed online, via sms or imported.



Historic Valuations

This sections displays the last twelve months valuations (if available) for the vehicle for its registered plate and stated mileage.



Revaluing a vehicle

If you need to re-visit a valuation, or lookup a registration number that has already been valued the application

gives you the option to Copy or Update the existing valuation which will be displayed in 'Other valuations'

NISSAN

QASHQAI DIESEL
HATCHBACK

Date of Registration 06 Jun 2014
VIN: SINFAJ11U1109890
Engine Number: Dissesses
Colour: BLUE
Derivative: 1.5 dCi Acenta Premium 5dr

Select Group to add valuation to:

This vehicle has already been valued. There were 2 existing valuations found.

Please select one of the options below.

Create NEW Valuation

Copy or View/Update Valuation

Alternatively you can choose to create a new valuation which will create a new valuation record for this vehicle.

You also have the option to add this valuation to a group if required and add a reference.



Create PDF Cancel

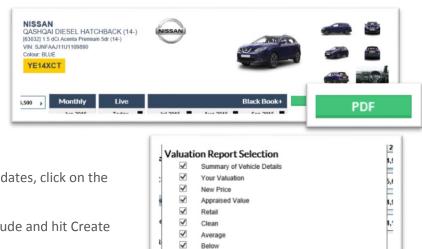
Create a PDF

Valuation Anywhere gives you the option to create a PDF which can be printed or emailed as required.

The PDF tool gives you full control over what elements of the vehicle and appraisals you wish to include.

When you have performed all necessary updates, click on the PDF button.

De-select any items you do not want to include and hit Create PDF.



Black Book+ Appraisal Options Added Equipment Removed Equipment Technical Offers Contact Details

Manage Valuations

As you build up a list of valuations, they will be displayed in **MY VALUATIONS**, which you can return to at any time by clicking on the link to the top left of the screen.

As time goes on you may want to update the valuations, move, copy or remove from you list of valuations.

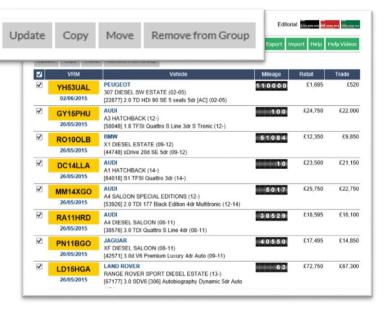
Tick the box on the header bar to select all vehicles in the group, or tick individual vehicles as required.

When a box is ticked a number of options will be displayed.

Click **UPDATE** to update values for all selected vehicles to latest values available within your subscription. (E.g. Vehicle originally valued May 13, but can be updated to June 13 values).

Use **COPY** or **MOVE** to create duplicate valuation records or move to another group.





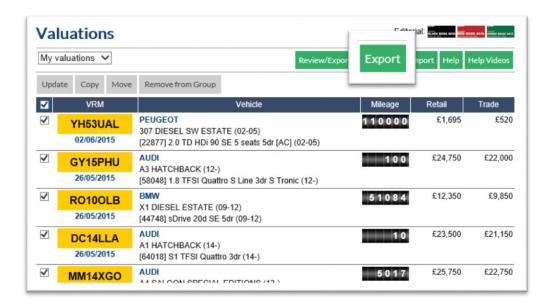
If you do not want to keep the valuation, click **REMOVE from GROUP**, and click OK to confirm you want to remove. This will remove the valuation from all records and cannot be retrieved.



Export

Valuation Anywhere gives you the option to export vehicle valuations for MI purposes.

From the main valuation page, select vehicles or groups as required and click the export button.



Fair Usage VRM Lookups



All Valuation Anywhere subscriptions include a number of 'fair usage' VRM lookups as determined by the subscription level (and duration). You will receive a warning as you approach the fair usage limit. The number of look-ups remaining on your subscription can be found under Admin > <u>User Reports</u>.

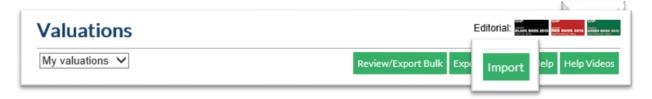
You can continue to use Valuation Anywhere for the remainder of your subscription period using the 'NO VRM' function described in the Value on the Web section. If, however, you wish to purchase further credits, please contact your Account Manager or email sales@cap.co.uk

Subscription based extras

Bulk Import Valuations

If your subscription includes Bulk Import Valuations, you have the ability to bulk import multiple vrms into your Valuation Anywhere account.

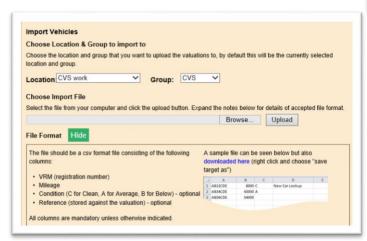
Upon login, from the main valuation page select Import





From this screen you view the file import format required to import. The file should hold the VRM in column A and mileage in column B as a minimum.

Columns C & D are optional to denote the condition (C = Clean, A = Average, B = Below) and a reference which will be stored against the valuation.



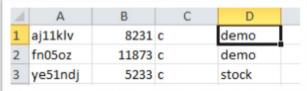
Scroll to the bottom of the summary page and click manual match.

This will display the available selections for each registration number.

Select as required and click confirm to move to the next vrm. If you do not want to do this immediately, the vehicles will not be valued, but you can return to the manual match anytime by click on the review/download button from your main valuations page.



imported. If Valuation Anywhere was unable to match to a vehicle or it is awaiting review this will be noted in the message column, otherwise all valuations available in your subscription will be displayed.



Before you import the file, you can choose the location and group (as described in <u>Admin</u> and <u>Value on your PC</u>) into which to store the vrms/valuations

When the file has uploaded, you will see a summary screen advising the number of vehicles that successfully imported and vehicles which have failed. The summary screen will advise which vehicles have failed due to possible alternative pack models and require further action from you to select the appropriate model.



To Bulk Export

If you wish to export a file to match a previous **import**, including any vrm's that could not be matched, click **REVIEW/EXPORT BULK**, from appropriate location and group, and download from 'import' required. The download creates a csv file with all registrations

