

# Training Guide Engineers / Reviewers



**GT Global: Claims Management Platform**

GT Motive | v21.3

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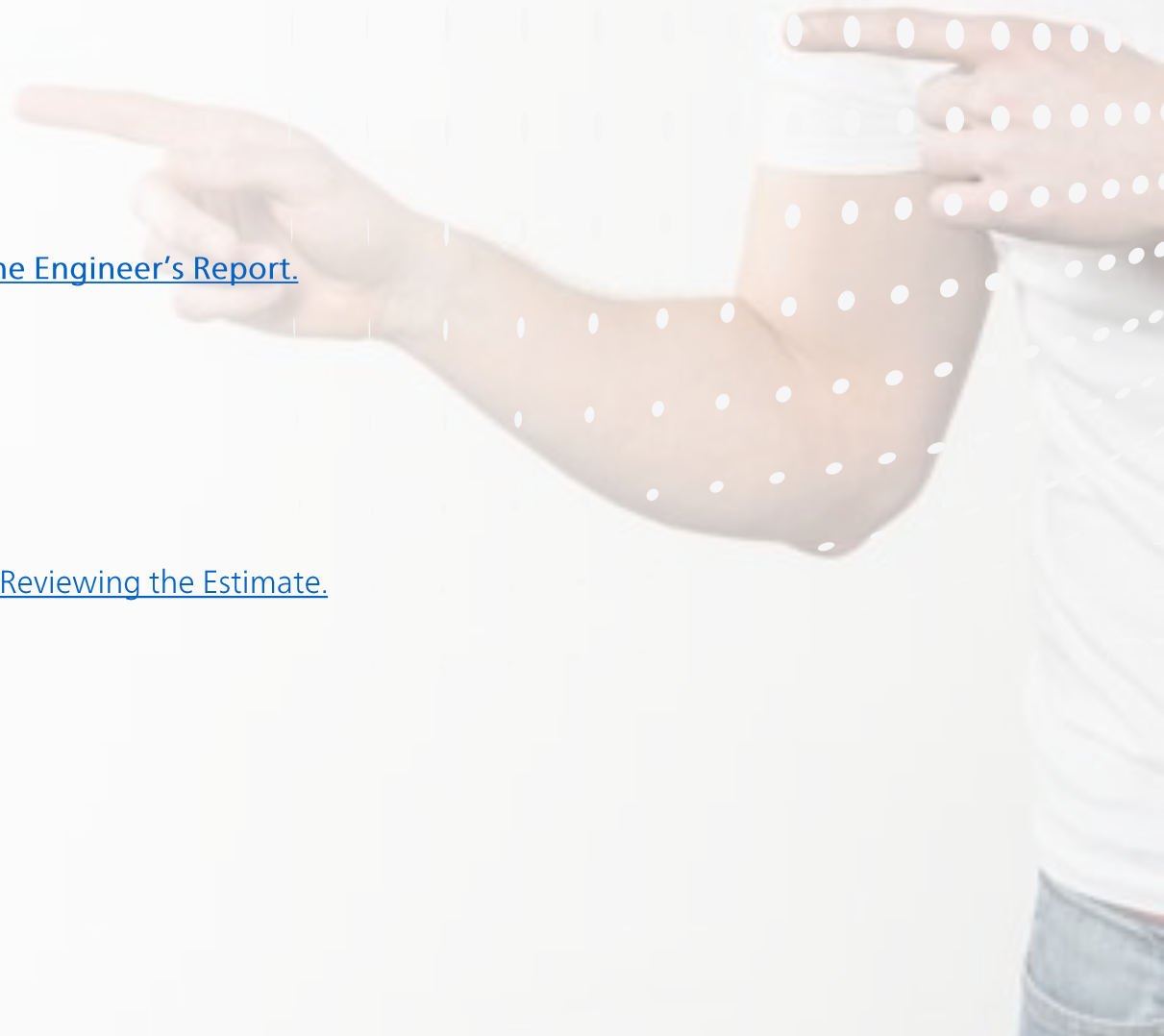
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# GT Global

## Access

To access **GT GLOBAL** enter the following site address in your browser <https://gtglobal.eu>

The **Username** and **Password** will be provided individually to each User.



gt global

User

Password

[FORGOT YOUR PASSWORD?](#)

[Log in](#)

gt motive  
a limited liability company

System Requirements  
© Copyright 2020 GT Motive. All rights reserved.

Version 5.24.7820.18016

To help solve any doubts or issues regarding GT GLOBAL contact our [Help Desk Service](#), the details of which are as follows:

**Support Hotline:** (+44) 0333 0065 401  
**Support E-mail:** [servicedesk@gtmotive-support.co.uk](mailto:servicedesk@gtmotive-support.co.uk)

Monday to Friday from 8 a.m. to 5 p.m. and Saturdays from 8 a.m. to 12:30 p.m.

Other Support Resources are available in: <https://gtmotive-support.co.uk/>

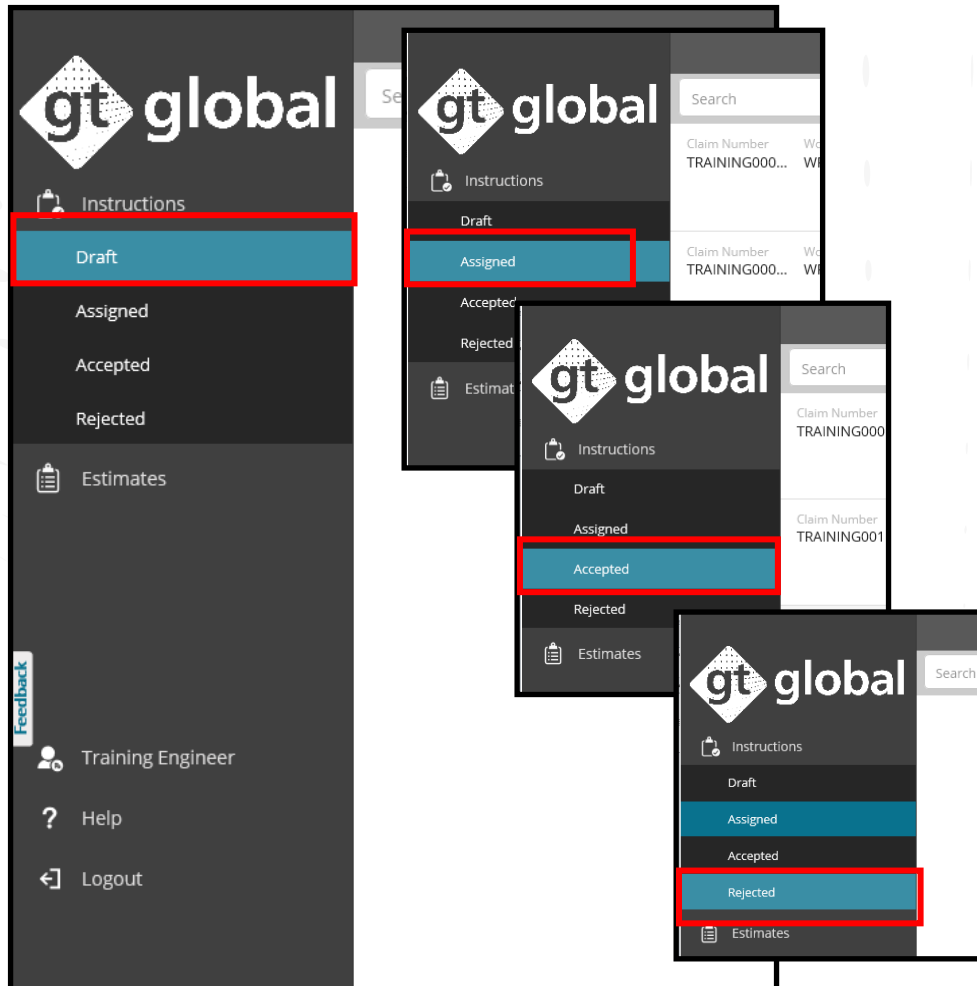


# GT Global

The Home Page



When you access **GT GLOBAL**, the “**Instructions Grid**” will open, where you’ll see all the “**Instructions**” that are ongoing. As each Instruction progresses, it will be transferred to a different area or subsection:



The **Instructions Grid** contains the following subsections:

**Draft:** New Instructions that have been created but not completed or sent.

**Assigned:** New Instructions that have been assigned to a Repairer.

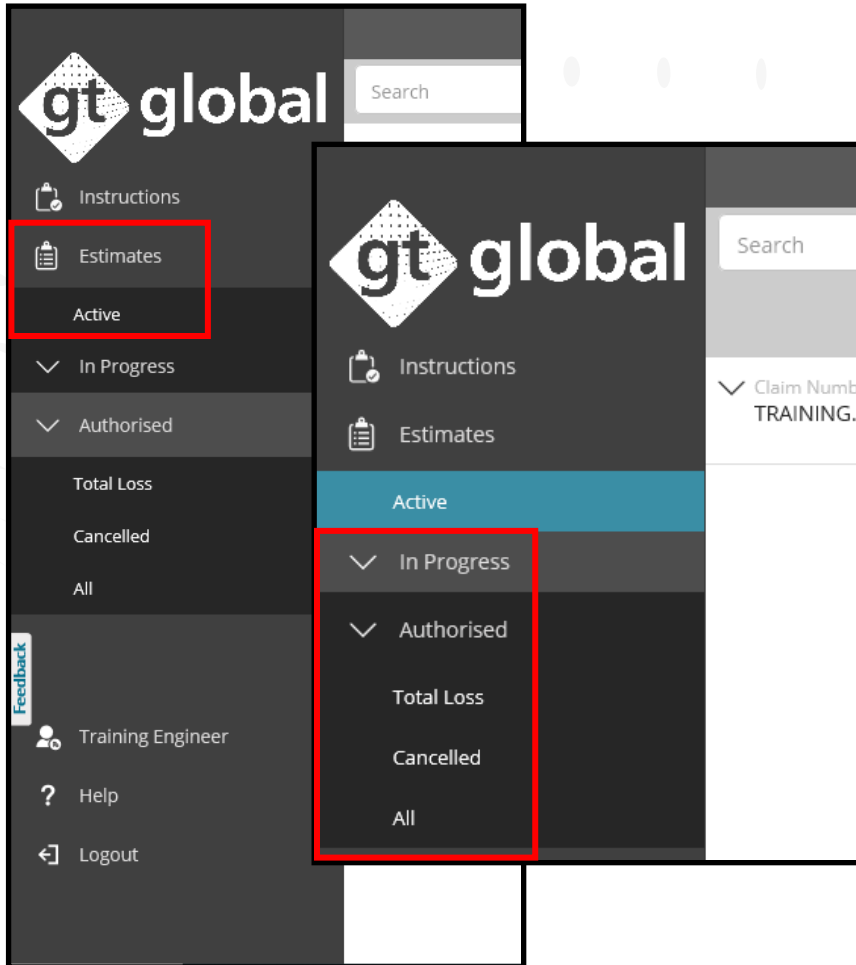
**Accepted:** Those Instructions that have been accepted by the Repairer.

**Rejected:** Instructions that for whatever reason have been rejected.

# General Overview – Estimates Grid (Part 1)

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When you access the “**Estimates Grid**”, you will be able to see all the “**estimates**” (Jobs) that are currently ongoing. The Estimates Grid is sub-divided into the following categories depending on the status of the Job. As the Job progresses, it will be transferred to a different area accordingly:



**Active:** All those jobs that have been accepted, but have not yet been worked on.

**In Progress:** Those jobs that have been started.

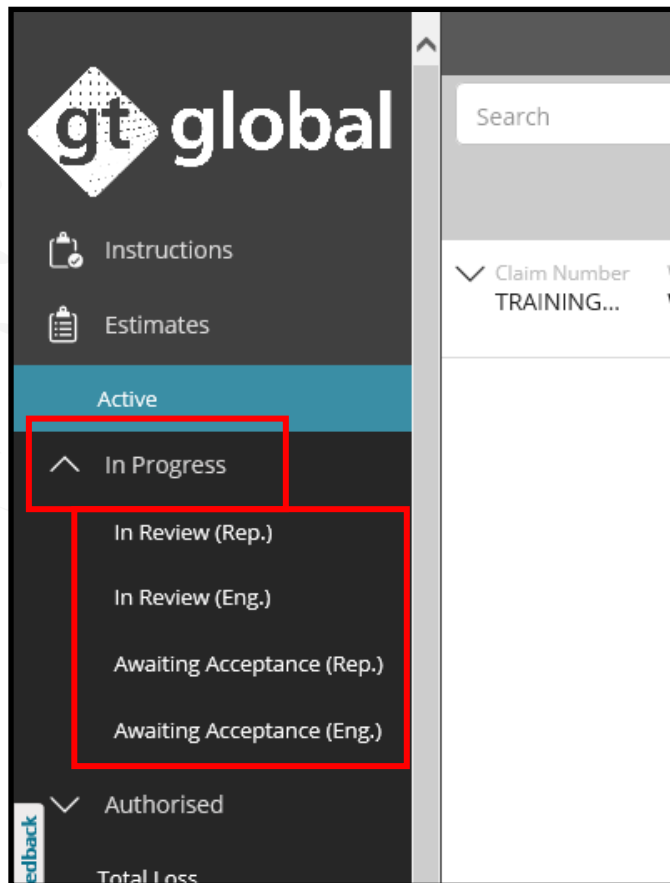
**Authorised:** Jobs that have been authorised.

**Total Loss:** Those jobs that have been declared a total loss.

**Cancelled:** Those jobs that have been cancelled.

**All Jobs:** In this section you can see all ongoing jobs regardless of their status.

In the “**In Progress**” section of the “**Estimates Grid**”, you will find the following sub-sections:



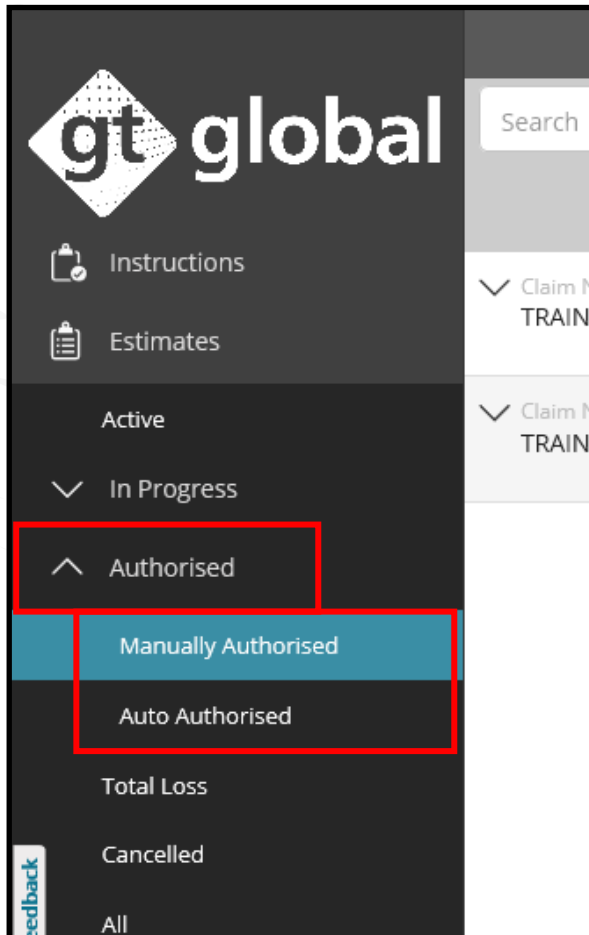
**In Review (Repairer):** Those jobs that the Repairer is currently working on (At this point the Engineer will not be able to work on the Job)

**In Review (Engineer):** Those jobs that the Engineer is currently working on. He/she has opened the estimate to review and/or make changes (At this point the Repairer will not be able to work on the Job).

**Awaiting Acceptance (Repairer):** Those jobs that have been returned to the Repairer. The Job is in waiting for the Repairer to accept or modify.

**Awaiting Acceptance (Engineer):** Those jobs that have been sent to the Engineer. The Job is in waiting for the Engineer to accept/approve or modify.

In the “**Authorised**” section of the “**Estimates Grid**”, you will also find the following sub-sections:



**Manually Authorised:** Those jobs that have been “manually” approved by the Engineer.

**Auto Authorised:** Those jobs that have been automatically approved by the business rules set-up in the platform.



In both the [Instructions](#) and [Estimates Grid](#) you can make use of the [Search and Sort function](#).

Introduce any parameter found in the claim line (E.g.: [Name](#), [Insurance Company](#), [Work Provider](#), [Make](#) or [Model of the vehicle](#), etc...), and those jobs containing that parameter will be filtered on the screen:

The screenshot displays the GT Global interface. On the left is a sidebar with navigation options: Instructions, Assigned, Accepted, Rejected, and Estimates. The main area shows a table of claim data. A search bar is highlighted with a red box. A 'Sort by' dropdown menu is also highlighted with a red box, and a red arrow points to the 'Sort' icon (a blue square with a white arrow) next to it. The dropdown menu is open, showing options: Make, Model, Registration Num..., Repairer, Excess, Modified, and Inspection Date. The 'Repairer' option is highlighted with a red box. The table below shows columns for Claim Number, Work Provider, Company, Policyholder, Registration Numl, Repairer, Excess, and Date Created / Modifi. The first row shows Claim Number TRAINING00011, Work Provider WP005, Company GT Motive Ins, Policyholder MARK HAMIL, Registration Numl, Repairer Training Rep..., Excess £150.00, and Date Created / Modifi 16/11/2020, 07:50. The second row shows Claim Number TRAINING00011, Work Provider WP005, Company GT Motive Ins, Policyholder FRP, Registration Numl, Repairer Training Rep..., Excess £150.00, and Date Created / Modifi 16/11/2020, 07:48. The third row shows Claim Number, Work Provider, Company, Policyholder, Registration Numl, Repairer, Excess, and Date Created / Modifi.

Also, choose a parameter from the drop down **"Sort by"** menu by which you wish to sort the list and click on the **"Sort"** icon to change from an ascending or descending order of view.

# Applying a Filter to the Jobs View

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In both the [Instructions](#) and [Estimates Grid](#) you can make use of the [Filters function](#).

Click on the [Filters](#) icon and you can apply any number of filters to your list to only view those jobs that you require. Once you've selected the necessary filters, click on "[Apply Filters](#)":

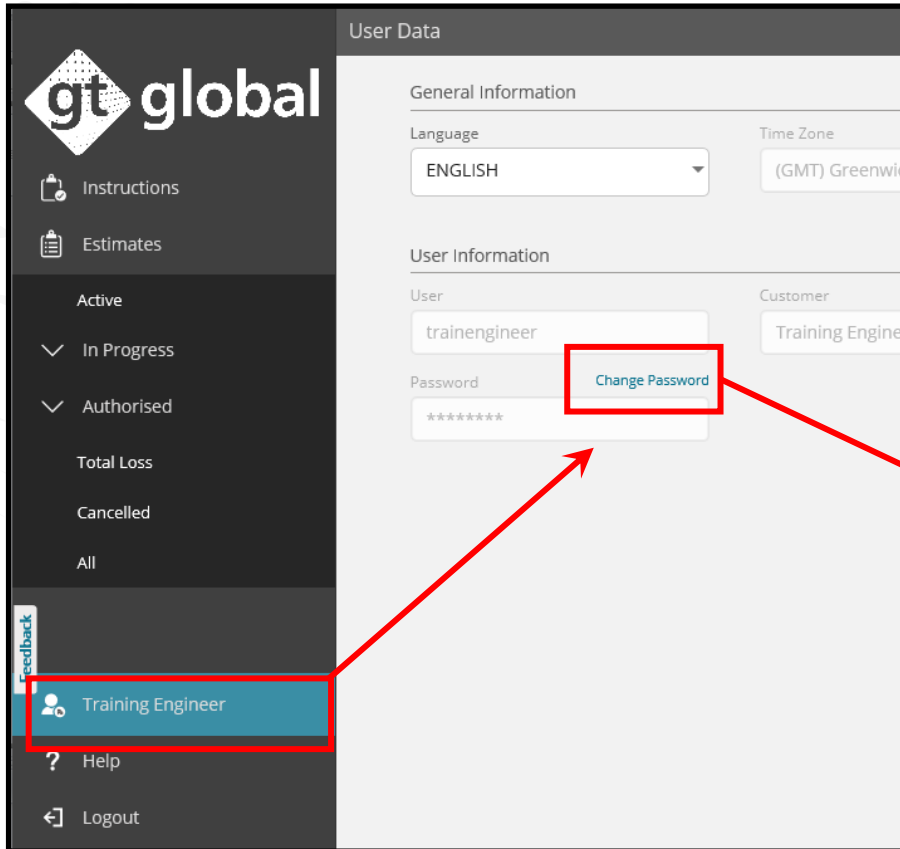
Click on the [Filters](#) icon to open and close the filters management area..

The screenshot shows the GT Global interface. On the left is a sidebar with navigation links: Instructions, Estimates, Active, In Progress, Authorised, Total Loss, Cancelled, and All. The main area displays a search bar, a search icon, and a filters icon (highlighted with a red box and a blue arrow). Below the search bar is a table of filters with columns: Claim Number, Company, Work Provider, Date Created, Modified Date, Make, Model, Registration Number, Gross Total, Status, TL Indicator, Compliance, Eng. Company, Managed By, Able to Authorise, Repairer, Images, and Claim Id. At the bottom right of the filters section are buttons for 'Clear Filters' and 'App Filter'.

# | Change Password

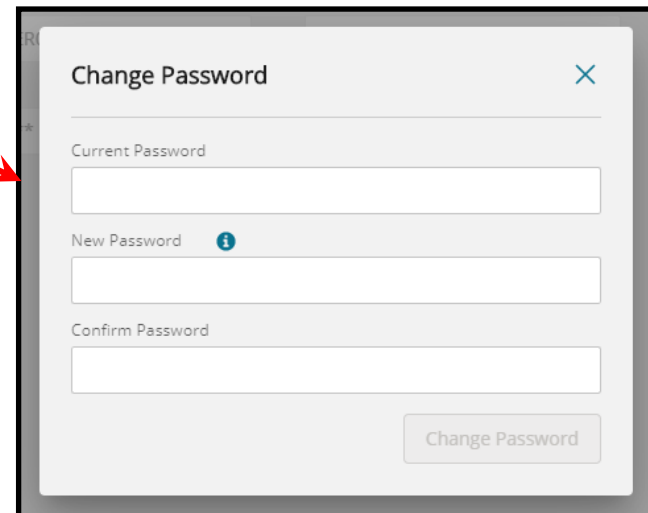
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If you wish to [change your password](#), go to your [User Information](#) area of the Home Page and click on “[Change Password](#)”:



The screenshot shows the 'gt global' user interface. On the left is a dark sidebar with navigation links: Instructions, Estimates, Active, In Progress, Authorised, Total Loss, Cancelled, All, Training Engineer (highlighted with a red box), Help, and Logout. The main content area is titled 'User Data' and contains 'General Information' (Language: ENGLISH, Time Zone: (GMT) Greenwich) and 'User Information' (User: trainengineer, Customer: Training Engineer). In the 'User Information' section, the 'Password' field is masked with asterisks, and a 'Change Password' link is highlighted with a red box. A red arrow points from this link to the 'Change Password' pop-up window on the right.

A pop-up window will appear where you'll be required to introduce your [current password](#), your [new password](#) and [confirm](#):



The 'Change Password' pop-up window has a title bar with a close button (X). It contains three input fields: 'Current Password', 'New Password' (with an information icon), and 'Confirm Password'. A 'Change Password' button is located at the bottom right of the form.



# GT Global

## The Instruction Phase



# Reviewing the Instruction Information (Part 1)

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The **"Instruction Phase"** is the initial phase when a new job is created by the Work Provider.

Inside each **Instruction** you will find a view based on **"Cards"** for each of the key areas needed to manage each job.

Open the various cards regarding the **Insured/Policyholder**, the **Vehicle** and the **Claim** to obtain/review all the necessary information:

**gt global**

MARK SMITH | NJ19FRP | TRAINING000002 Claim Id: 6677

Instructions Instruction Information

**MARK SMITH**  
AUDI A1  
Training Repairer

Summary

**Policyholder**

Insured  
MARK SMITH  
Address  
SMITH STREET 2345DFY SMITHTOWN  
Contact  
1234134 / MARKSMITH@GTMOTIVE.COM  
VAT Registered  
No VAT Portion Payable  
0

**Vehicle**

Vehicle  
AUDI A1  
Registration Number  
VIN  
Colour  
GREY  
Drivable  
No  
Mileage  
35,000  
Collection Required  
Yes

**Claim**

Insurance  
GT Motive Insurance WP005  
Claim  
TRAINING000002  
Policy Number  
TRAINING000002  
Cortesy Car Required  
Yes  
Able to Authorise  
Yes  
Excess  
£200.00  
Third Party Claim  
Yes

Estimate Attachments

The Insured/  
Policyholder Info  
Card.

The Claim Info  
Card.

The Vehicle Info  
Card.

# Reviewing the Instruction Information (Part 2)

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Once you have opened any of the information cards ([Insured/Policyholder](#), [Vehicle](#) or [Claim Info](#)), you will be able to review all the information regarding the job.

Use the the [horizontal bar](#) situated in the upper part of the screen to switch between each information card.

Click on [Previous](#) to return to the general Instruction summary.

The image displays three overlapping screenshots of the GT Motive interface, illustrating the process of reviewing instruction information. Each screenshot shows a different information card: 'Insured/Policyholder Info', 'Vehicle Info', and 'Claim Info'. A horizontal displacement bar at the top of each card allows switching between them. Red boxes highlight the 'Previous' button and the selected tab in each card. Blue arrows point from a text box to the horizontal bar and the 'Previous' button.

**Insured/Policyholder Info**

Claim Number: TRAINING0003, Claim Reference: NJ19FRP, Other Reference: [Empty]

Registration Number: NJ19FRP, Mileage: [Empty], Drivable: Yes [No]

VIN: [Empty]

Make: AUDI, Model: AI

Collection Required: Yes [No], Recovery From 3rd Party: Yes [No], Collection Provided: Yes [No]

Contact: First Name: PAUL, Last Name: SMITH, Address Line 1: [Empty], Address Line 2: [Empty], Postal Code: [Empty], Telephone 1: [Empty], Telephone 2: [Empty], Email: [Empty]

VAT Registered: Yes [No], VAT Portion Payable: 0.00, Customer: 0

**Vehicle Info**

Claim Number: TRAINING0003, Claim Reference: NJ19FRP, Other Reference: [Empty]

Registration Number: NJ19FRP, Mileage: [Empty], Drivable: Yes [No]

VIN: [Empty]

Make: AUDI, Model: AI

Collection Required: Yes [No], Recovery From 3rd Party: Yes [No], Collection Provided: Yes [No]

Contact: First Name: PAUL, Last Name: SMITH, Address Line 1: [Empty], Address Line 2: [Empty], Postal Code: [Empty], Telephone 1: [Empty], Telephone 2: [Empty], Email: [Empty]

**Claim Info**

Claim Number: TRAINING0003, Claim Reference: NJ19FRP, Other Reference: [Empty]

Accident Date: 16/9/2020, Date Reported: 16/9/2020, On-Site Vehicle Inspection Date: 17/9/2020

Policy Number: TRAINING0003, Coverage Type: Comprehensive, Type of Damage: Collision, Third Party Claim: Yes [No]

Work Provider: WP005, Scheme: 21, Repairer: Training Repairer

Emp. Company: [Empty], Managed By: Training Engineer

Excess: 150.00, Excess Status: Apply [Not], Able to Authorise: Yes [No], Without Prejudice: Yes [No], Liability Stance: Non at Fault

Courtesy Car Required: Yes [No], Courtesy Car Type: [Empty], Courtesy Car Provided: Yes [No]

Date Booked For Repair: [Empty], Estimated Repair Days: [Empty]

# How to create a New Instruction (Part 1)

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As we've explained the **"Instruction Phase"** is the initial phase when a new job is created by the Work Provider. Under normal circumstances, new instructions are created by the Work Provider Platform through integration with GT Global.

To create a new **instruction manually** if the need arises, and depending on the permissions and role that have been granted to you, go to the **"Draft"** section of the **Instructions Grid** and click on **"New Instruction"** above to the right:



You will be led to a page where you should in the first instance introduce all the information regarding the **Policy Holder**. Fill-in all the fields and click on **"Save & Next"** or just **"Save"** if you wish to save the instruction and continue at a later time:

A screenshot of the 'New Instruction' form in the GT Global application. The 'Policyholder' tab is selected and highlighted with a red box. The form contains several input fields: 'Claim Number' (filled with 'TRAINING000078'), 'Claim Reference', 'Other Reference', 'Contact' (with sub-fields for 'First Name' (MARK), 'Last Name' (HAMILTON), 'Address Line 1' (LONG ROAD), 'Address Line 2', 'City' (BIG CITY), 'Postal Code' (234GTF), 'Email' (MARKHAMILTON@GTMOTIVE.COM), 'Telephone' (12434234), and 'Mobile Phone' (14534456456)). There are also checkboxes for 'VAT Registered' (Yes/No) and 'VAT Portion Payable' (0). The 'Save & Next' button is highlighted with a red box. The left sidebar shows 'Instructions' with 'Draft' selected, and the bottom of the sidebar shows 'Training Engineer'.

# How to create a New Instruction (Part 2)

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In the **Policy Holder** section, fill-in all the fields regarding the details of the policy holder and driver, and whether they are VAT Registered or not.

Click on **"Save & Next"** or just **"Save"** if you wish to save the instruction and continue at a later time:

**gt global**

Instructions

Draft

Assigned

Accepted

Rejected

Estimates

Feedback

Training Engineer

Help

Logout

Previous Save Save & Next

**Policyholder** Vehicle Claim

Claim Number: TRAINING000078

Claim Reference:

Other Reference:

**Insured** Driver

Contact

First Name: MARK

Last Name: HAMILTON

Address Line 1: LONG ROAD

Address Line 2:

City: 3IG CITY

Postal Code: 234GTF

Email: MARKHAMILTON@GTMOTIVE.COM

Telephone: 12434234

Mobile Phone: 14534456456

VAT Registered: Yes No

VAT Portion Payable: 0

Customer Contribution:



# How to create a New Instruction (Part 3)

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In the next section, **Vehicle**, fill-in all the fields regarding the details of the vehicle (**Millage**, **Reg. Number**, **VIN**, **Make**, **Model**, **Colour**, whether its **Drivable**, whether **Collection is Required** and whether the **Inspection Site Location is Required**.

Click on **"Save & Next"** or just **"Save"** if you wish to save the instruction and continue at a later time:

MARK HAMILTON | TRAINING000078

Claim Id: 1580

Previous Save Save & Next

Instructions

Draft Assigned Accepted Rejected Estimates

Feedback

Training Engineer Help Logout

Policyholder **Vehicle** Claim

Claim Number TRAINING000078 Claim Reference TRAINING000078 Other Reference

Registration Number REGNO Mileage Drivable Yes No

VIN

Make AUDI Model A1 Colour BLUE Vehicle Type iger car

Collection Required Yes No Recovery From 3rd Party Yes No Collection Provided Yes No

Contact Address Line 1 Address Line 2 Telephone 1 Telephone 2 Email

Inspection Site Location Required

Repairer Insured Other No

Contact Address Line 1 Address Line 2 City Postal Code Telephone 1 Telephone 2 Email

Inspection Site Location Required

Repairer Insured Other No

Contact Address Line 1 City Postal Code

Depending on the chosen **Inspection Site** you may have to fill in the address details.

# How to create a New Instruction (Part 4)

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In the next section, **Claim**, fill-in all the fields regarding the claim details such as the **Policy Number**, **Accident Date**, **Date Reported**, **On Site Inspection Date**, **Work Provider**, the **Eng. Company**, who it's going to be **Managed by**, the **Scheme**, any specific **Estimate Options**, the **Repaire**, a brief description of the **Accident Circumstances** and **Damage Description**.

Scroll down to fill-in the **Type of Damage**, whether it's a **Third Party Claim**, whether it is **Able to Authorise**, **Without Prejudice**, the **Excess** amount and **Status**, whether a **Courtesy Car** is required and the **Type**, the **Type of Coverage** and **Liability Stance**, any **Accident Circumstances**, **Damage Description**, **Payment Instructions** and **Additional Data**. Click on **"Save and Send"** :

The screenshot displays the 'Claim' form in the GT Motive system. The form is organized into a grid of input fields and sections. The top right corner features buttons for 'Previous', 'Save', and 'Save & Send'. The left sidebar contains navigation links for 'Draft', 'Assigned', 'Accepted', 'Rejected', 'Estimates', 'Training Engineer', 'Help', and 'Logout'. The form fields include:

- Claim Number:** TRAINING000078
- Claim Reference:** TRAINING000078
- Other Reference:** (empty)
- Accident Date:** 1/12/2020
- Date Reported:** 1/12/2020
- On-Site Vehicle Inspection Date:** 3/12/2020
- Policy Number:** TRAINING000078
- Coverage Type:** Comprehensive
- Type of Damage:** Collision
- Third Party Claim:** Yes/No (No selected)
- Work Provider:** WP005
- Scheme:** 22
- Repaire:** Training Repaire
- Eng. Company:** GT Motive Insurance
- Managed By:** Training Engineer
- Excess:** (empty)
- Excess Status:** Apply/Not (Not selected)
- Able to Authorise:** Yes/No (No selected)
- Without Prejudice:** Yes/No (No selected)
- Liability Stance:** Non at Fault
- Courtesy Car Required:** Yes/No (No selected)
- Courtesy Car Type:** Manual
- Date Booked For Repair:** 3/12/2020
- Estimated Repair Days:** 3
- Accident Circumstances:** COLLISION
- Damage Description:** FRONT END
- Payment Instructions:** (empty)
- Additional Data:** (empty)

# How to create a New Instruction (Part 5)

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In the **Claim** card there's also an **Assessment Notes** field, which when filled in, will appear in the **Engineer's Report** which will be generated (Go to the Section [11 – The Estimate is Approved / The Authority Note and Engineer's Report](#)):

The screenshot displays the 'GT Global' web application interface. On the left is a dark sidebar with navigation links: 'Instructions', 'Draft', 'Assigned', 'Accepted', 'Rejected', 'Estimates', 'Training Engineer', 'Help', and 'Logout'. The main content area is titled 'global' and features a top navigation bar with 'Previous', 'Save', and 'Save & Send' buttons. Below this, there are three tabs: 'Policyholder', 'Vehicle', and 'Claim', with the 'Claim' tab selected and highlighted by a red box. The 'Claim' tab contains several input fields: 'Claim Number' (TRAINING000078), 'Claim Reference' (TRAINING000078), 'Other Reference' (empty), 'Accident Date' (1/12/2020), 'Date Reported' (1/12/2020), and 'On-Site Vehicle Inspection Date' (3/12/2020). Below these are 'Policy Number' (TRAINING000078), 'Work Provider' (WP005), 'Eng. Company' (GT Motive Inc.), and 'Excess' (empty). A large text area labeled 'Assessment Notes' is highlighted with a red border and contains the placeholder text 'ANY ASSESSMENT NOTES THAT WILL APPEAR IN THE ENGINEER'S REPORT....'. Below this are 'Courtesy Car Required' (Yes/No buttons), 'Courtesy Car Type' (Manual dropdown), and 'Courtesy Car Provided' (Yes/No buttons). Further down are 'Date Booked For Repair' (3/12/2020), 'Accident Circumstances' (COLLISION), 'Payment Instructions' (empty), and 'Additional Data' (empty). A blue callout box with an arrow pointing to the 'Assessment Notes' field contains the text: 'Write any assessment notes here that will then appear in the Engineer's Report.'

# How to create a New Instruction (Part 6)

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In the Claim Card the **Estimate Options** can also be set. Under normal circumstances the estimate options (i.e.: Labour Rates, Discounts, Paint, Sundry Parts amount, etc...) are set automatically by the Platform depending on the Work Provider, Scheme and Repairer that's been selected.

However, depending on the permissions and role that have been granted to you, you can override or set the estimate options of the Job by clicking on **"Estimate Options"** in the **Claim Card** and setting them:

The image shows a screenshot of the GT Motive web application. On the left is a sidebar with the 'gt global' logo and navigation links: 'Instructions' (with sub-links: Draft, Assigned, Accepted, Rejected), 'Estimates', 'Training Engineer', 'Help', and 'Logout'. The main area is the 'Claim Card' for a claim with ID 'TRAINING000078'. It contains various fields for claim details, dates, policy information, and repairer details. A red box highlights the 'Estimate Options' button in the bottom right of the claim card. A red arrow points from this button to a modal window titled 'Estimate Options'. The modal contains sections for 'Scheme', 'Hourly Labour Rates' (with a 'Mode' selector and a table for T1, T2, T3), 'Discounts' (with fields for Total, Parts, Labour, and Paint), and 'Paint' (with fields for Paint Material Index and Pearlescent Uplift).

# How to create a New Instruction (Part 7)

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Once you have completed the three sections [Policy Holder](#), [Vehicle](#) and [Claim](#) with all the details, the Instruction will be transferred to the **"Assigned"** area of the [Instructions Grid](#):

gt global

Instructions

Draft

Assigned

Accepted

Rejected

Estimates

Search

🔍

⚙️

Sort by 

Modified

📄

New Instruction

Claim Number	Work Provider	Policyholder	Make	Registration Number	Repairer	Excess	Date Created / Modified
TRAINING000078	WP005	MARK HAMILTON	AUDI		Training Repairer		01/12/2020, 12:52PM
			Model A1				Inspection Date 03/12/2020, 12:00AM
Claim Number	Work Provider	Policyholder	Make	Registration Number	Repairer	Excess	Date Created / Modified
TRAINING00011	WP005	MARK HAMILTON	AUDI		Training Repairer	£150.00	16/11/2020, 07:46AM
			Model A1				Inspection Date 18/11/2020, 12:00AM
Claim Number	Work Provider	Policyholder	Make	Registration Number	Repairer	Excess	Date Created / Modified
TRAINING00011	WP005	MARK HAMILTON	AUDI		Training Repairer	£150.00	16/11/2020, 07:44AM
			Model A1				Inspection Date 18/11/2020, 12:00AM

Once the Repairer accepts the Instruction, the Job will be transferred to the **"Accepted"** area of the [Instructions Grid](#):

Instructions

Draft

Assigned

Accepted

Rejected

Estimates

Search

Sort by

modified

New Instruction

Claim Number	Work Provider	Policyholder	Make	Registration Number	Repairer	Excess	Date Created / Modified
TRAINING000078	WP005	MARK HAMILTON	AUDI		Training Repairer		01/12/2020, 12:57PM
			Model A1				Inspection Date 03/12/2020, 12:00AM

Claim Number	Work Provider	Policyholder	Make	Registration Number	Repairer	Excess	Date Created / Modified
TRAINING00011	WP005	MARK HAMILTON	AUDI		Training Repairer	£150.00	01/12/2020, 10:45AM
			Model A1				Inspection Date 18/11/2020, 12:00AM

Claim Number	Work Provider	Policyholder	Make	Registration Number	Repairer	Excess	Date Created / Modified
TRAINING001	WP005	PAUL SMITH	AUDI		Training Repairer		30/11/2020, 04:12PM

# Reassigning the Job to **another AMC & Engineer (1)**

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Depending on the permissions and role that have been granted to you, you can reassign a Job to a different **Engineering Company** and/or **Engineer/Engineering Team** to manage the Job.

This can be done by going to the **Claim Card** of the Job, and in the section **"Eng. Company"** and **"Managed by"** you can deploy the drop down menus and select any of the Engineering Companies and Engineer/Engineering Team options available:

The screenshot shows a web interface titled "Estimate Options" with a gear icon. It features two dropdown menus highlighted with red boxes. The first dropdown, labeled "Eng. Company", has "GT Motive Insurance" selected. The second dropdown, labeled "Managed By", has "Training Engineer" selected. Below these are four sections: "Excess" with a value of "150.00", "Excess Status" with "Apply" and "Not" buttons, "Able to Authorise" with "Yes" and "No" buttons, and "Without Prejudice" with "Yes" and "No" buttons.

In some cases, and again depending on the permissions and role that have been granted to you, you may only be able to select the **Eng. Company**, and it will be the relevant person within that Engineering Company who can in-turn assign the Engineer/Engineering Team in the **"Managed by"** field.

## Reassigning the Job to another AMC & Engineer (2)

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You can also **reassign Jobs "in bulk"** to a different Engineering Company and/or Engineer/Engineering Team from the **Estimates Grid**.

Click on the **"Select"** button above to the right, select the Job/s that you wish to reassign, and in the section **"Eng. Company"** and **"Managed by"** you can deploy the drop down menus and select any of the Engineering Companies and Engineer/Engineering Team options available.

Remember that depending on the permissions and role that have been granted to you, you may only be able to select the **Eng. Company**, and it will be the relevant person within that Engineering Company who can in turn assign the Engineer/Engineering Team in the **"Managed by"** field.

The screenshot displays the 'Estimates Grid' interface with a search bar, sort options (Modified), and a table of jobs. A 'Select' button is highlighted in the top right. Below the table, two modal windows are shown: 'Engineering Company' and 'Managed By'. The 'Engineering Company' modal shows 'GT Motive Insurance' selected. The 'Managed By' modal shows 'Training Engineer' selected. A callout box points to the checkbox in the table, stating: 'Select the Job/s in bulk that you wish to reassign.'

	Claim Number	Work Provider	Eng. Company	Registration Nur	Gross Total	Status/Reason	Managed By	Repairer	Date Created	Mod
<input checked="" type="checkbox"/>	TRAINING00...	WP005	GT Motive...				Training Engineer			
<input type="checkbox"/>	TRAINING00...	WP005	GT Motive...							

**Engineering Company**

- ☒ GT Motive Insurance

**Managed By**

- ☐ Outside Any Team
- ☒ Training Engineer
- ☐ JP Engineer

Select the Job/s in bulk that you wish to reassign.



# GT Global

## The Estimate Phase



Once the Repairer has accepted the Instruction during the Instruction Phase, the Job/Claim is transferred to the "Active" list of the Estimate's Grid, and the "Estimate Phase" commences:

The screenshot shows the GT Global software interface. On the left is a sidebar with navigation options: Instructions, Estimates, Active (highlighted in blue), In Progress, Authorised, Total Loss, Closed, and All. The main area displays a table of claims. The first claim line is highlighted with a red box. A red arrow points from this claim line to a detailed view of the claim.

**Estimate's Grid (Active Tab):**

Claim Number	Work Provider	Eng. Company	Registration Num	Gross Total	Status/Reason	Managed By	Repairer	Date Created / Modified
TRAINING00...	WP005	GT Motive I...			Active	Training En...	Training Re...	01/12/2020, 1...
TRAINING00...	WP005	GT Motive			Active	Training En...	Training Re...	01/12/2020, 1...

**Claim Details (MARK SMITH | AUDI A1 | TRAINING000002):**

**Policyholder:** Insured: MARK SMITH, Address: SMITH STREET 2345DFY SMITHTOWN, Contact: 1234134 / MARKSMITH@GTMOTIVE.COM, VAT Registered: No, VAT Portion Payable: 0.

**Vehicle:** Vehicle: AUDI A1, Registration Number: , Drivable: No, Mileage: 35,000, Colour: GREY, Collection Required: Yes.

**Claim:** Insurance: GT Motive Insurance WP005, Claim: TRAINING000002, Policy Number: TRAINING000002, Excess: £200.00, Able to Authorise: Yes, Third Party Claim: Yes.

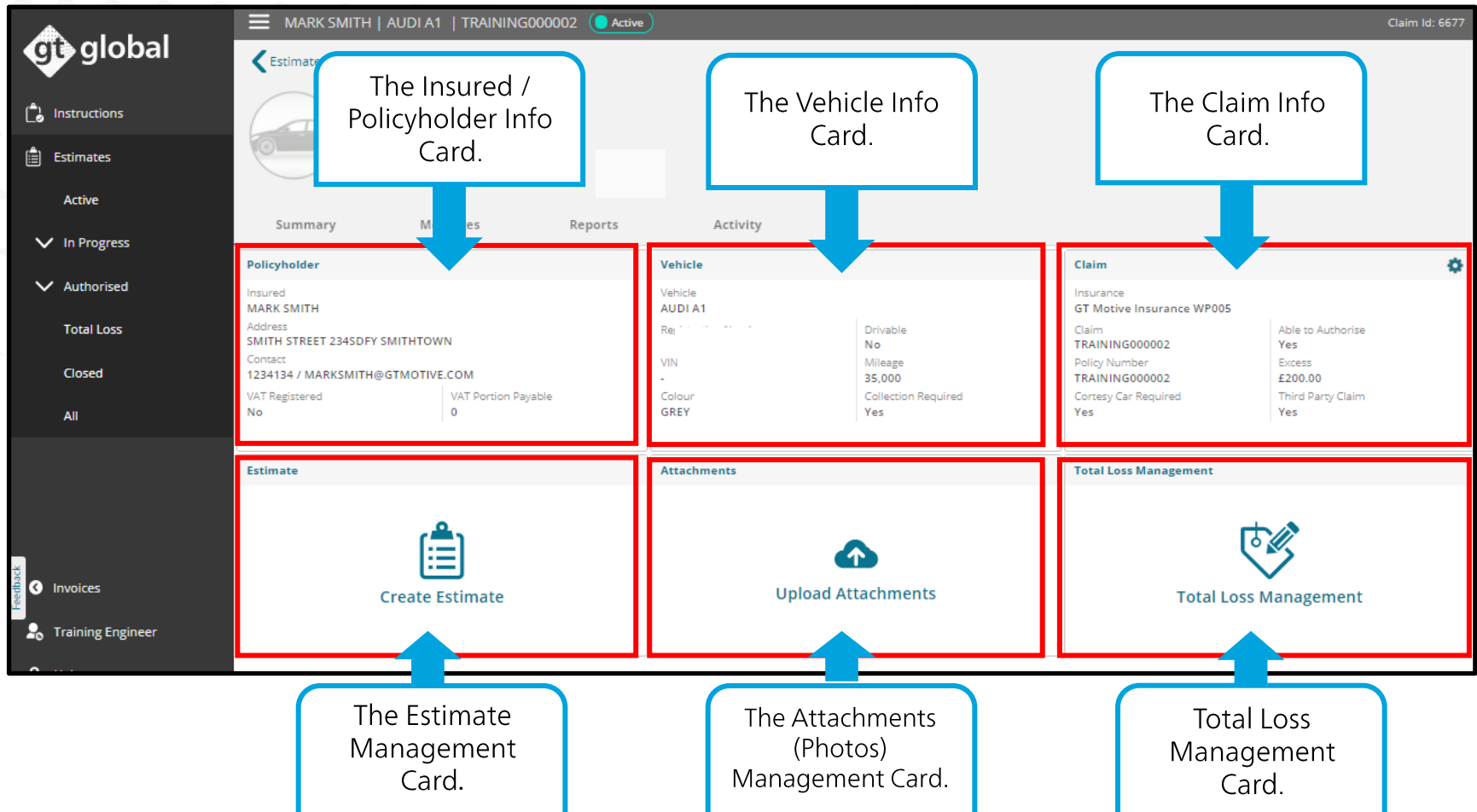
**Actions:** Create Estimate, Upload Attachments, Total Loss Management.

Double click on the claim line to open the Instruction.

# General Overview of the Claim Summary (Part 1)

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Inside each [claim/job](#) you will find a view based on “Cards” for each of the key areas needed to correctly manage the job.



# General Overview of the Claim Summary (Part 2)

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Remember that you can open any of the information cards ([Insured/Policyholder](#), [Vehicle](#) or [Claim Info](#)), to review all the information regarding the job at any time.

As before, use the [horizontal bar](#) situated in the upper part of the screen to switch between each information card.

Click on [Previous](#) to return to the general job summary.

The image displays three overlapping screenshots of a web application interface for managing claims. Each screenshot shows a horizontal displacement bar at the top with three tabs: **Policyholder**, **Vehicle**, and **Claim**. The **Previous** and **Save** buttons are located in the top right corner of each screen.

- Insured/Policyholder Info:** The first screenshot shows the **Policyholder** tab selected. It includes fields for **Claim Number** (TRAINING0003), **Claim Reference** (NJ19FRP), **Other Reference**, **Registration Number** (NJ19FRP), **Mileage**, **Drivable** (Yes/No), **VIN**, **Make** (AUDI), **Model** (AI), **Collection Required** (Yes/No), **Recovery From 3rd Party** (Yes/No), **Collection Provided** (Yes/No), **Contact** (First Name, Last Name, Address Line 1, Email), **VAT Registered** (Yes/No), **VAT Portion Payable** (0.00), and **Customer** (0).
- Vehicle Info:** The second screenshot shows the **Vehicle** tab selected. It includes fields for **Claim Number** (TRAINING0003), **Claim Reference** (NJ19FRP), **Other Reference**, **Registration Number** (NJ19FRP), **Mileage**, **Drivable** (Yes/No), **VIN**, **Make** (AUDI), **Model** (AI), **Collection Required** (Yes/No), **Recovery From 3rd Party** (Yes/No), **Collection Provided** (Yes/No), **Contact** (First Name, Last Name, Address Line 1, Address Line 2, Postal Code, Telephone 1, Telephone 2, Email), **VAT Registered** (Yes/No), **VAT Portion Payable** (0.00), and **Customer** (0).
- Claim Info:** The third screenshot shows the **Claim** tab selected. It includes fields for **Claim Number** (TRAINING0003), **Claim Reference** (NJ19FRP), **Other Reference**, **Registration Number** (NJ19FRP), **Mileage**, **Drivable** (Yes/No), **VIN**, **Make** (AUDI), **Model** (AI), **Collection Required** (Yes/No), **Recovery From 3rd Party** (Yes/No), **Collection Provided** (Yes/No), **Contact** (First Name, Last Name, Address Line 1, Address Line 2, Postal Code, Telephone 1, Telephone 2, Email), **VAT Registered** (Yes/No), **VAT Portion Payable** (0.00), and **Customer** (0).

Annotations in the image include red boxes around the **Policyholder**, **Vehicle**, and **Claim** tabs, and a blue box around the **Horizontal displacement bar**.

# Messages

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In the upper section of the claim, apart from the main "Summary" tab, you'll find a further "Messages" tab. In this tab you will find two different messaging areas where you'll be able to exchange messages with the [Repairer](#) ("Public" Messages), and/or internal messages with [other Users within your company](#) ("Private" Messages).

Write a message and click on [Send Message](#):

The screenshot displays the GT Global web application interface. On the left is a dark sidebar with the 'gt global' logo and a menu including 'Instructions', 'Estimates', 'Active', 'In Progress', 'In Review (Rep.)', 'In Review (Eng.)', 'Awaiting Acceptance (Rep.)', 'Awaiting Acceptance (Eng.)', 'Authorised', 'Total Loss', 'Cancelled', 'All', 'Traini', '? Help', and 'Logout'. The main content area is titled 'Estimates Estimate Information' and features a profile for 'MARK HAMILTON', an 'AUDI A1' 'Training Repairer'. Below the profile are three tabs: 'Summary', 'Messages' (highlighted with a red box), and 'Reports'. The 'Messages' tab is divided into 'Public' (highlighted with a red box) and 'Private' (highlighted with a red box). A callout box points to the 'Public' section with the text: 'Write a message to the [Repairer](#).' Another callout box points to the 'Private' section with the text: 'Write an internal message to other Users within your company.' The 'Public' section shows a message from 'Training Repairer' stating 'THE VEHICLE IS IN THE WORKSHOP. COURTESY CAR PROVIDED.' dated '01/12/2020, 02:05 PM'. The 'Private' section shows a message from 'Training Engineer' stating 'PLEASE TAKE CARE WITH THIS ONE.....' dated '01/12/2020, 02:07 PM'. At the bottom of the interface, there is a 'Type a Message' input field and a 'Send message' button, both highlighted with red boxes.

# Creating the Estimate

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Once you have reviewed the claim details, you can proceed to **create the estimate** of the vehicle damages. Click on **"Create Estimate"** to access **GT Estimate**:

The screenshot displays the GT Motive software interface for creating an estimate. The main window shows a 3D model of a white Audi A1 Sportback with its front end damaged. Below the model, there are icons for various vehicle components and a red arrow pointing to the 'Create Estimate' button, which is highlighted with a red box.

**Vehicle Information:** CLM1970 AUDI | A1 (GB) SPORTBACK (18-) | SPORTBACK TFSI SPORT |

**Functional Group:** [Dropdown] **Parts:** [Dropdown] **Operations:** [Dropdown]

**Vehicle:** [Icon] **Equipment:** [Icon] **Data:** [Icon] **Operations:** [Icon] **Calculate:** [Icon] **Pictures:** [Icon] **Feedback:** [Icon]

**MARK SMITH | AUDI A1 | T**

**Estimates** Estimate Information

**MARK SMITH**  
AUDI A1  
Training Repairer

**Summary** Message

**Policyholder**

Insured: MARK SMITH  
Address: SMITH STREET 2345DFY SMITHTOWN  
Contact: 1234134 / MARKSMITH@GTMOTIVE.COM  
VAT Registered: No  
VAT Portion Payable: 0

Colour: GREY  
35,000  
Collection Required: Yes  
TRAINING000002  
Cortesy Car Required: Yes  
£200.00  
Third Party Claim: Yes

**Estimate** **Attachments** **Total Loss Management**

**Create Estimate** **Upload Attachments** **Total Loss Management**

# Attaching Photos (Part 1)

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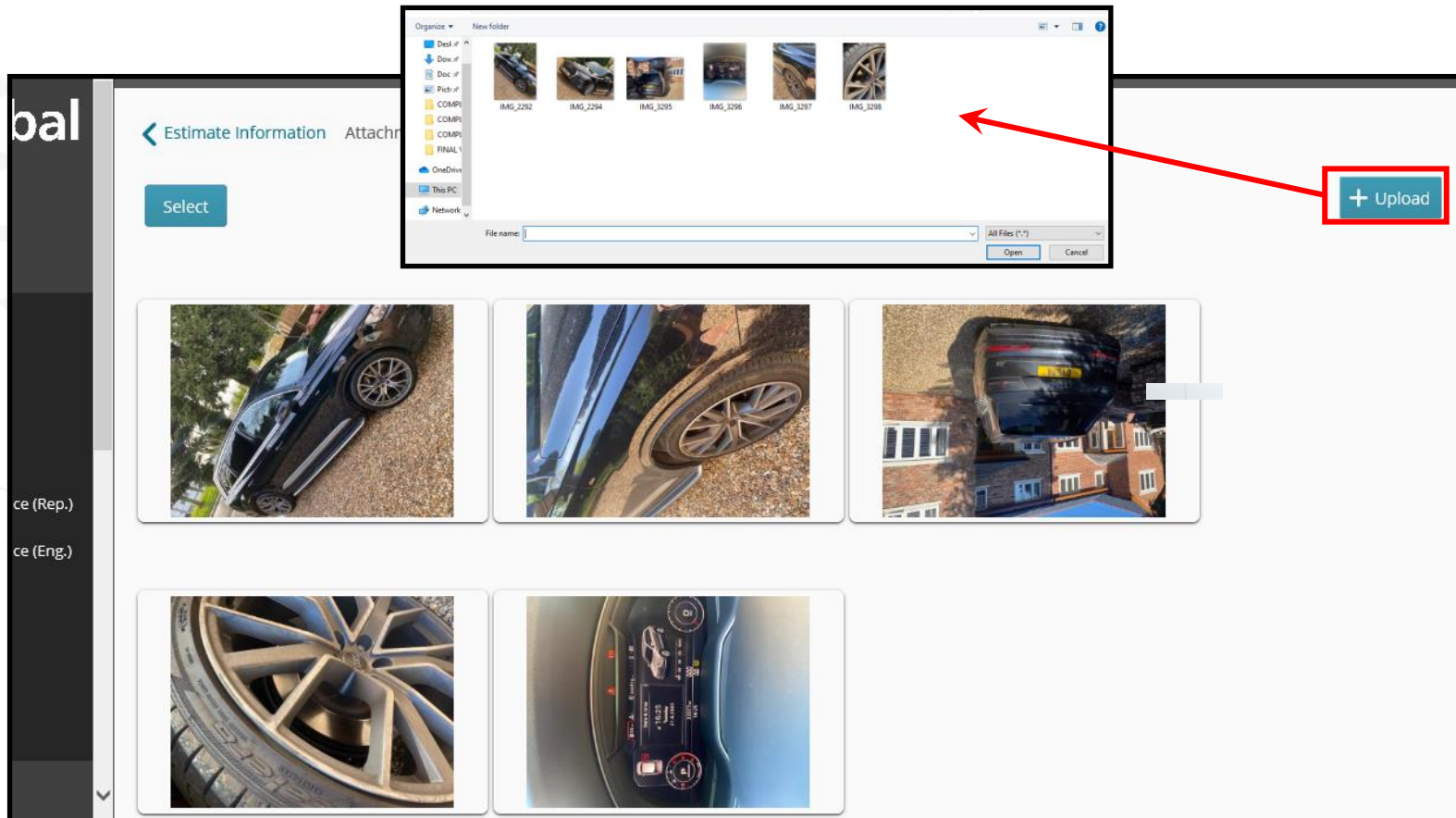
Click on **"Upload Attachments"** in the **Attachments Management Card** to upload the photos and/or any documents to the Job:

The screenshot displays the GT Motive web application interface. On the left is a dark sidebar with the 'gt global' logo and navigation links: Instructions, Estimates, Active, In Progress, Authorised, Total Loss, Closed, All, Invoices, and Training Engineer. The main content area shows a job for 'MARK SMITH | AUDI A1 | TRAINING000002'. Below this is a 'Policyholder' section with details for Mark Smith, an insured person at SMITH STREET 2345DFY SMITHTOWN, with contact 1234134 / MARKSMITH@GTMOTIVE.COM. To the right of this is a 'Vehicle' section for an AUDI A1, registration number -, VIN -, colour GREY, with 35,000 miles and a collection required. Further right is a 'Claim' section for GT Motive Insurance WP005, claim TRAINING000002, policy number TRAINING000002, and a courtesy car required. Below these sections are three cards: 'Create Estimate' (with a clipboard icon), 'Upload Attachments' (with a cloud and upload icon, highlighted by a red box and a red arrow pointing to a modal), and 'Total Loss Management' (with a heart and pencil icon). The 'Upload Attachments' modal is open, showing a grid of three photo thumbnails (car exterior, wheel, and dashboard) and an '+ Upload' button in the top right corner. The modal also has a 'Select' button and tabs for 'Estimate Information' and 'Attachments'.

# Attaching Photos (Part 2)

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Once inside the [Attachments](#) area, click on “**Upload**” to select the photos from your PC.

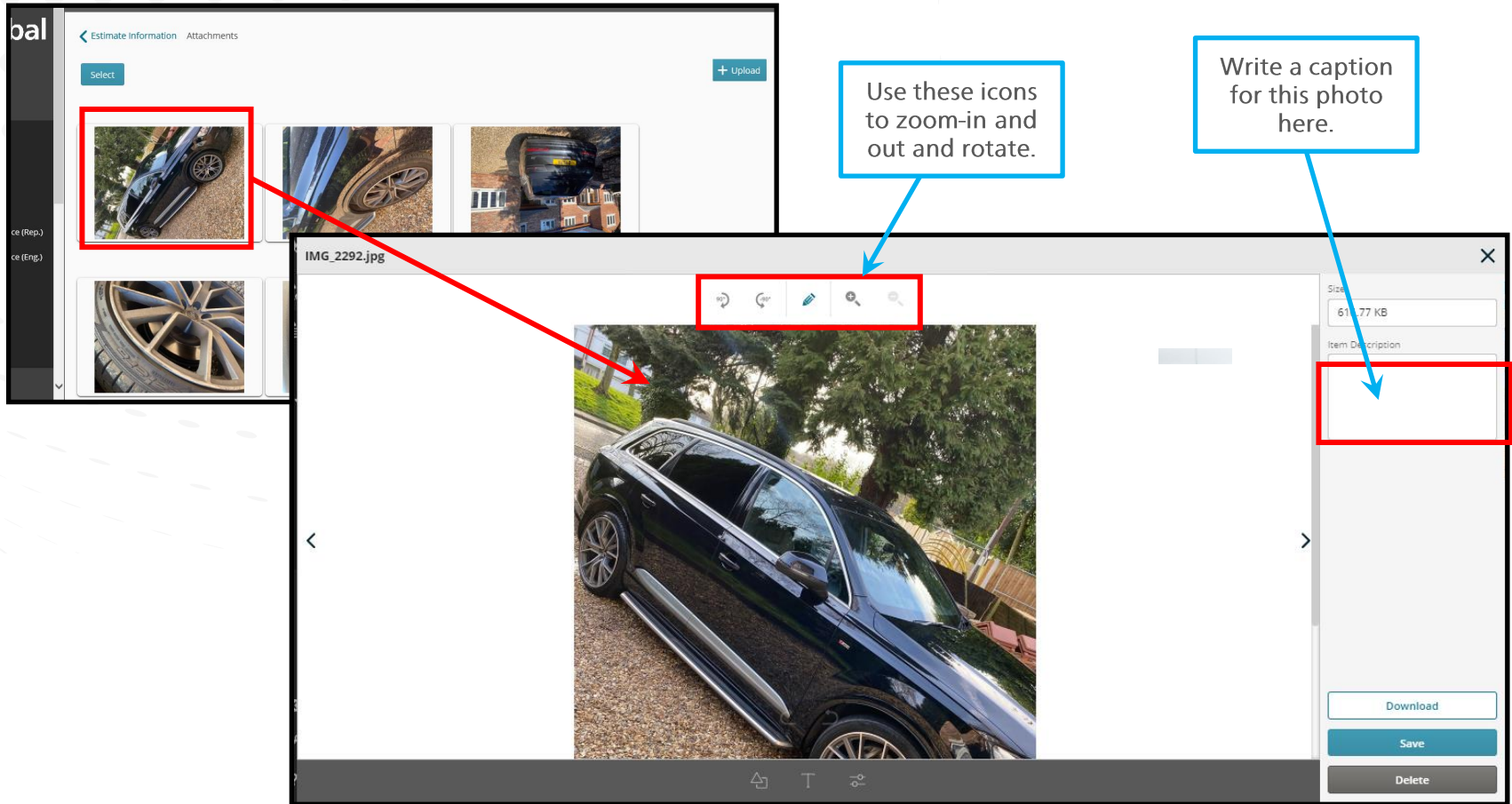




# Attaching Photos (Part 3)

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You can also click on each thumbnail picture to **zoom-in and out**, **rotate**, **delete** or **write a caption**:

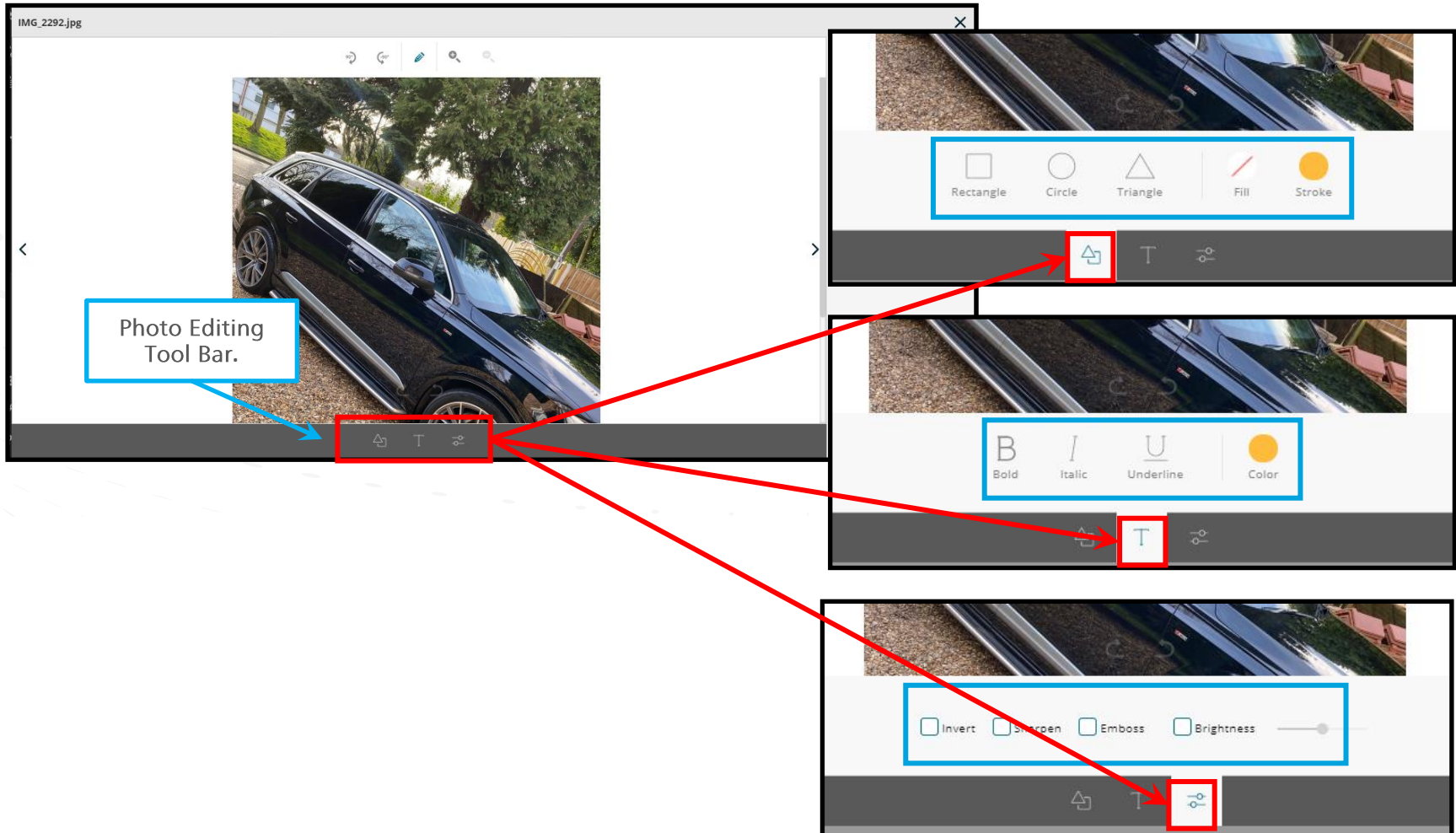




# Attaching Photos (Part 4)

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Use the tool bar below to access different editing functionalities, such as **drawing triangles or squares** in the photo, **writing text** or **modifying the brightness, sharpness**, etc...:





# GT Global

## How to Use GT Estimate

# Identifying the Vehicle

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Once **GT Estimate** opens, you can use the **VRN (Registration Number) Look-up** and **VIN Query** functions to identify the vehicle and its equipment in the **Vehicle Information** screen.

It's also very important to make sure you have the correct **Profile** selected, depending on the Work Provider.

The screenshot shows the 'Estimate identification' screen in the GT Estimate application. The header displays 'CLM1970 AUDI | A1 (GB) SPORTBACK (18-) | SPORTBACK TFSI SPORT'. The left sidebar contains navigation icons for Vehicle, Equipment, Data, Operations, Calculate, Feedback, and Reports. The main form includes the following fields and annotations:

- Estimate identification section:**
  - Estimate No:** CLM1970
  - User code:** CUSTOMER GTESTIMATE EN - afernandez - GtEs...
  - Profile:** WP003 (highlighted with a red box and a callout: 'Choose your Profile from the drop down menu.')
  - Reference:** (empty field)
- Vehicle data section:**
  - Miles:** 30000
  - Reg. No:** 454XXX (with a 'VRN Look-up Function.' callout pointing to its icon)
  - VIN:** V S B I D A X X X X X X X X X X (with a 'VIN Query Function.' callout pointing to its icon)
  - Make:** AUDI
  - Model:** A1 (GB) SPORTBACK (18-) (\*\*\*)
  - Source:** VinQuery
  - Model type:** NextGen
  - Add make and base model:** (toggle switch)

A large callout box at the bottom right states: 'Under normal circumstances all the vehicle and estimate information contained in this screen (Profile, VRN, VIN, Estimate No., etc...) will be filled-in automatically.'

# Identifying the Vehicle Equipment

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Work your way down the menu situated to the left, to the **Equipment Screen**.

From here you can **review/modify the vehicle equipment**.

The screenshot shows the 'Equipment' screen in a software interface. On the left, a vertical menu lists various vehicle components: Range equipment, Bodywork, Vehicle type, Exterior equipment, Interior equipment, Advanced driving assistance system, Engine, Maintenance, Gearbox, Running, and Labels. The 'Equipment' option is highlighted with a red box and a red arrow pointing to the main content area. A large blue arrow points down the left menu. The main content area is titled 'Version / Model type' and contains a grid of checkboxes for different equipment options, such as 'ADMIRE', 'ADVANCED', 'ATTRACTION', 'BLACK LINE EDITION', 'BUSINESS LINE', 'DESIGN', 'DESIGN LUXE', 'EDITION ONE', 'EPIC EDITION', 'SE', 'S LINE', 'S LINE C', and 'SPORT'. A blue callout box points to the 'Equipment' menu item with the text: 'Work your way down the different stages of the estimate.' Another blue callout box points to the main content area with the text: 'With the use of the VIN Query Function the vehicle equipment will be filled-in automatically. Under normal circumstances the vehicle equipment needs not to be modified.' A third blue callout box points to the right-hand sidebar with the text: 'Find here a summary of the vehicle equipment.' The sidebar, titled 'ADDED EQUIPMENT', lists various equipment items under different categories: Range equipment (Manufacture date: 03/12/2018), Bodywork (On road: 5 DOORS - K8R), Vehicle type (General: COUNTRY GROUP A - FU0), Exterior equipment (General: ECE FRONT/REAR NUMBER PLATE MOUNT - 31K, WITHOUT DECORATIVE MATERIAL - 6F0, BRAND AND TYPE EMBLEM - 2Z8, SPORTS BUMPER - 2JK, EXTERIOR AND INTERIOR CHROMED TRIMS - QJ1), Lights (LED HEADLAMPS - 8IT, HEADLAMP WASHER - 8Y1, HEADLAMP HEI, "DENMARK" - 8, REAR TAIL LIGHT, REAR FOGLIGHT), Glass (WINDSCREEN (S, HEATED GLASS), Mirrors (EXT ELECTRIC/HEATED - 6XD, WITH STANDARD CASING - 6FA, EXT RIGHT ASPHERICAL - 6TS, EXT LEFT CONVEX - 5SJ), and Trims.

With the use of the **VIN Query** Function the vehicle equipment will be filled-in automatically. Under normal circumstances the vehicle equipment needs not to be modified.

Find here a summary of the vehicle equipment.

# The Estimate Data Screen (Part 1)

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Work your way down the menu situated to the left, to the [Data Screen](#).

From here you can [review/modify the estimate data](#). Such things as the [labour rate](#), [paint system](#) and [info](#), [discounts](#), [excess](#), the [vehicle attributes/damages](#) and [waste EPA charge](#) etc.. can be reviewed and modified.

CLM1970 AUDI | A1 (GB) SPORTBACK (18-) | SPORTBACK TFSI SPORT |

Vehicle

Equipment

Data

Operations

Calculate

Pictures

Feedback

Hourly labour rates

Paint

Parts

Excess

Taxes

Estimate attributes

Free text

Vehicle attributes

Vehicle damages

Regional settings

Discounts

Mode

☆ T1	40	40	40	40	40
☆ T2	40	40	40	40	40
☆ T3	40	40	40	40	40

Hourly labour rates

☆ Fixed 300

☆ Percentage 0 %

☆ Maximum 0

☆ Minimum 0

Excess

# The Estimate Data Screen (Part 2)

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In the **Data Screen** special care must be taken in the following areas:

1 – Vehicle Attributes (Vehicle Status): Establish the **Vehicle status** (Good, Medium, Bad or Not Roadworthy).

☆ Vehicle status

Other	Good	Medium	Bad	Not roadworthy
-------	------	--------	-----	----------------

The screenshot shows a horizontal row of five buttons: 'Other', 'Good', 'Medium', 'Bad', and 'Not roadworthy'. The 'Medium' button is highlighted in dark blue, indicating it is the selected status.

2 – Vehicle Attributes (Damage): Establish the **Vehicle Condition**, **Type of Damage** and **Severity**.

Damage

☆ Vehicle Condition

Mobile	Drivable	Road worthy	Un-Roadworthy	Immobile	Partly Repaired	Dismantled
--------	----------	-------------	---------------	----------	-----------------	------------

☆ Type of Damage

Theft	Collision	Fire	Flood	Vandalism
-------	-----------	------	-------	-----------

☆ Severity of Damage

Light	Medium	Heavy	Structural Damage
-------	--------	-------	-------------------

The screenshot shows three sections: 'Vehicle Condition' with 7 buttons (Drivable is selected), 'Type of Damage' with 5 buttons (Collision is selected), and 'Severity of Damage' with 4 buttons (Medium is selected).

3 – Vehicle Attributes (Others): Establish whether you consider the vehicle to be a **Total Loss** and whether its **Economically** and/or **Technically Repairable**.

Others

☆ Total loss

Yes	No	Pending
-----	----	---------

☆ Economically reparable

Yes	No	Pending
-----	----	---------

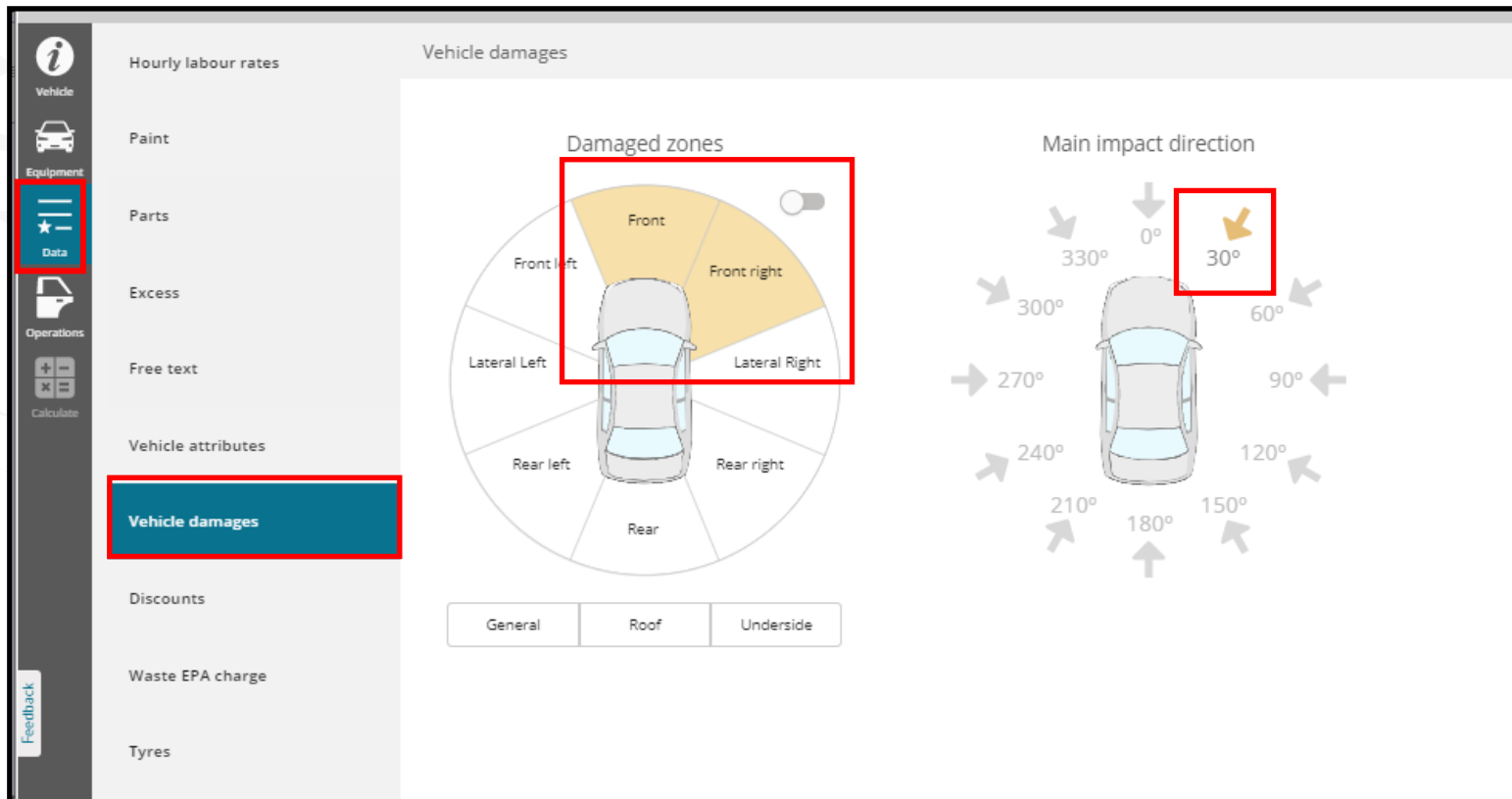
☆ Technically reparable

Yes	No	Pending
-----	----	---------

The screenshot shows three sections: 'Total loss' with 3 buttons (No is selected), 'Economically reparable' with 3 buttons (Yes is selected), and 'Technically reparable' with 3 buttons (Yes is selected).

In the **Data Screen** special care must be taken in the following areas (Continued):

4 – Vehicle Damages: Establish where the damages have occurred on the vehicle.



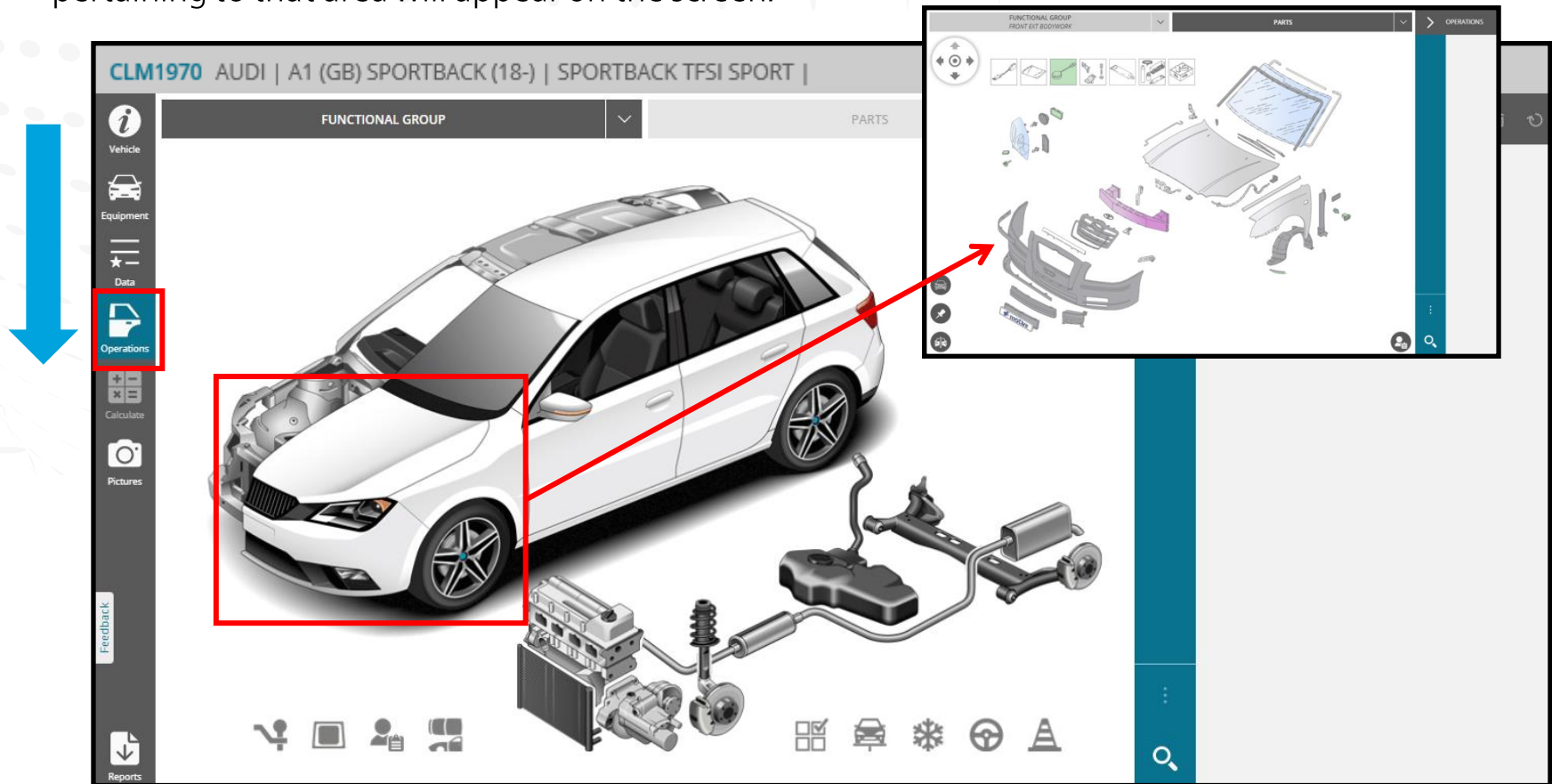
# The Operations Selection Screen (Part 1)

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Keep working your way down the menu situated to the left, to the **Operations Selection Screen**.

From here you can start **adding all the operations and items to the estimate**.

Select the **Functional Group** (Area of the vehicle) you wish to work with and immediately the parts pertaining to that area will appear on the screen:

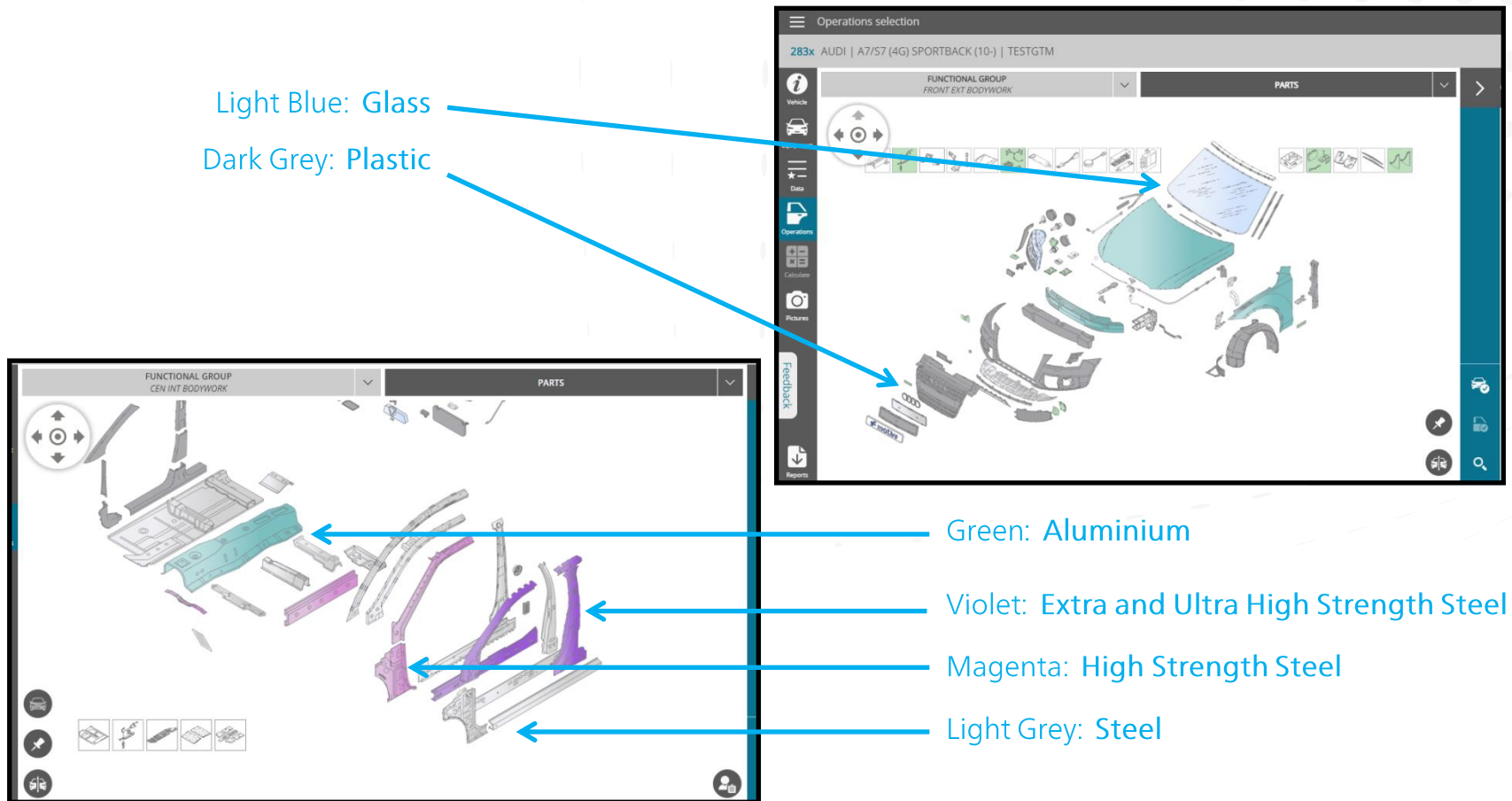




# The Operations Selection Screen (Part 2)

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The colour that the parts are shaded in depict the material that they are made of:



# Adding an Operation

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Select the required part/item, and to the right of the parts selection area you will be able to select what type of operation (task) you wish to carry out on said part: **Replace**, **repair**, **remove and refit**, **paint**, **anti corrosion treatment**, **verify**, **adjust**, **strip/refit**, **polish**, etc... The part is then added to the **Operations List**.

The types of operations (tasks) available depends upon the part that has been selected.

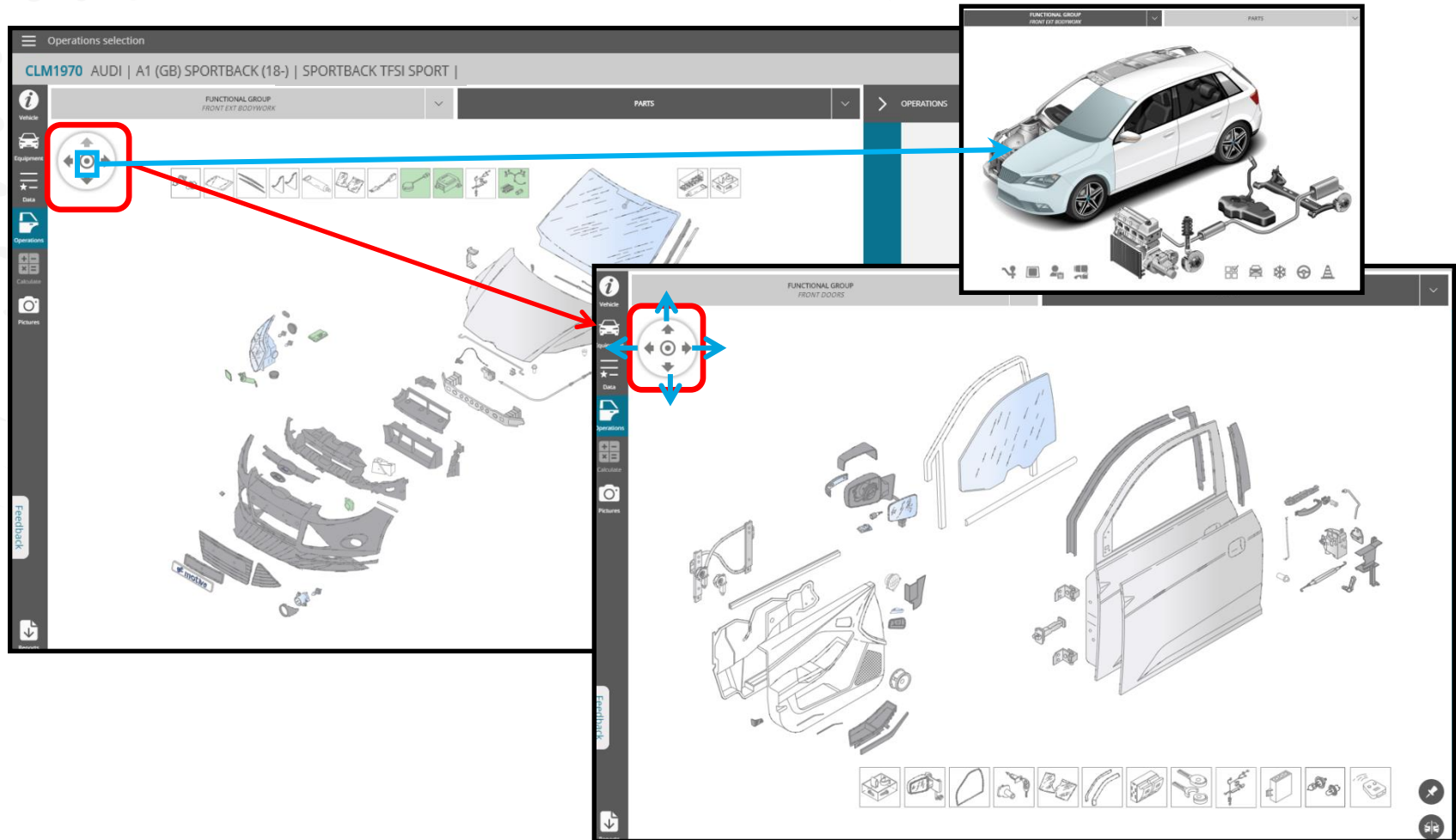
The screenshot displays the CLM1970 software interface for an Audi A1 (GB) Sportback (18-) Sport TFSI. The interface is divided into several sections:

- Header:** CLM1970 AUDI | A1 (GB) SPORTBACK (18-) | SPORTBACK TFSI SPORT |
- Left Sidebar:** Contains icons for Vehicle, Equipment, Data, Operations, Calculate, Pictures, Feedback, and Reports.
- Top Navigation:** Functional Group (FRONT EXT BODYWORK) and Parts (Bonnet).
- Main Area:** A 3D exploded view of the car's front end. A red box highlights a headlamp assembly, with a red arrow pointing from it to the 'Replace' operation in the Operations List.
- Operations List:** A vertical list of operations on the right side of the screen. The 'Replace' operation is highlighted with a red box. A blue box highlights the 'Adjust' operation. A blue arrow points from a text box to the 'Adjust' operation.
- Operations List Details:** A red box highlights the details for the 'Replace' operation: Left headlamp \*\* [Panel-T1] 8117, 205163, £183.92 + (1.30h \* £40.00/h), and £235.92. A blue arrow points from a text box to this details area.
- Text Boxes:**
  - A blue box at the bottom center says: "Use this little tab to deploy the task labels on the screen." with a blue arrow pointing to a small tab icon at the bottom of the Operations List.
  - A blue box on the right says: "The operations and items will be added to the Operations List." with a blue arrow pointing to the 'Replace' operation details.

# Moving Around the **Various Functional Groups**

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Use the little **"Joystick"** icon situated in the top right hand corner of the **parts selection screen** to move between the different **Functional Group** areas, or click in the **middle of the virtual joystick** to go back to the global view of the vehicle to select a different **Functional Group**:



# Adding a Paint Operation (Part 1)

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When you choose to **paint** a part, or if you replace a part that requires painting, a slide-out menu is deployed where you should choose the **Paint Options** (Damage Level, Painting Conditions <"Parts removed", "On vehicle, not pre-painted" or "On vehicle, pre-painted">). Make your selection and **"Accept"** to add the paint operation to the **Operations List**:

The screenshot displays the CLM1970 Audi A1 (GB) Sportback (18-) Sport TFSI Sport interface. The left sidebar contains navigation icons for Vehicle, Equipment, Data, Operations, Calculate, Pictures, and Reports. The main area shows a 3D model of the car with a blue box highlighting the bonnet. A red box highlights the 'Paint' option in the 'OPERATIONS' list. A red arrow points from the 'Paint' option to the 'PART MANAGEMENT' slide-out menu. The 'PART MANAGEMENT' menu shows 'OPTIONS OF PAINT' for 'Painting - Bonnet'. It includes a 'Damage Level' section with 'New Part (I)' and 'Surface (II)' selected, and 'Repaired <50% (III)' and 'Repaired >50% (IV)' options. Below this is a 'Painting conditions' section with 'On vehicle, not pre-painted' and 'On vehicle, pre-painted' options, and a 'Parts removed' button. A red arrow points from the 'Parts removed' button to the 'Accept' button at the bottom right of the slide-out menu. The 'Accept' button is highlighted with a red box.

**CLM1970 AUDI | A1 (GB) SPORTBACK (18-) | SPORTBACK TFSI SPORT |**

**FUNCTIONAL GROUP** FRONT EXT BODYWORK **PARTS** Bonnet **OPERATIONS** 1

**PART MANAGEMENT**  
OPTIONS OF PAINT

Painting - Bonnet

Damage Level

New Part (I) Surface (II)

Repaired <50% (III) Repaired >50% (IV)

Paint new part

Painting conditions

On vehicle, not pre-painted

On vehicle, pre-painted

Parts removed

Cancel Accept

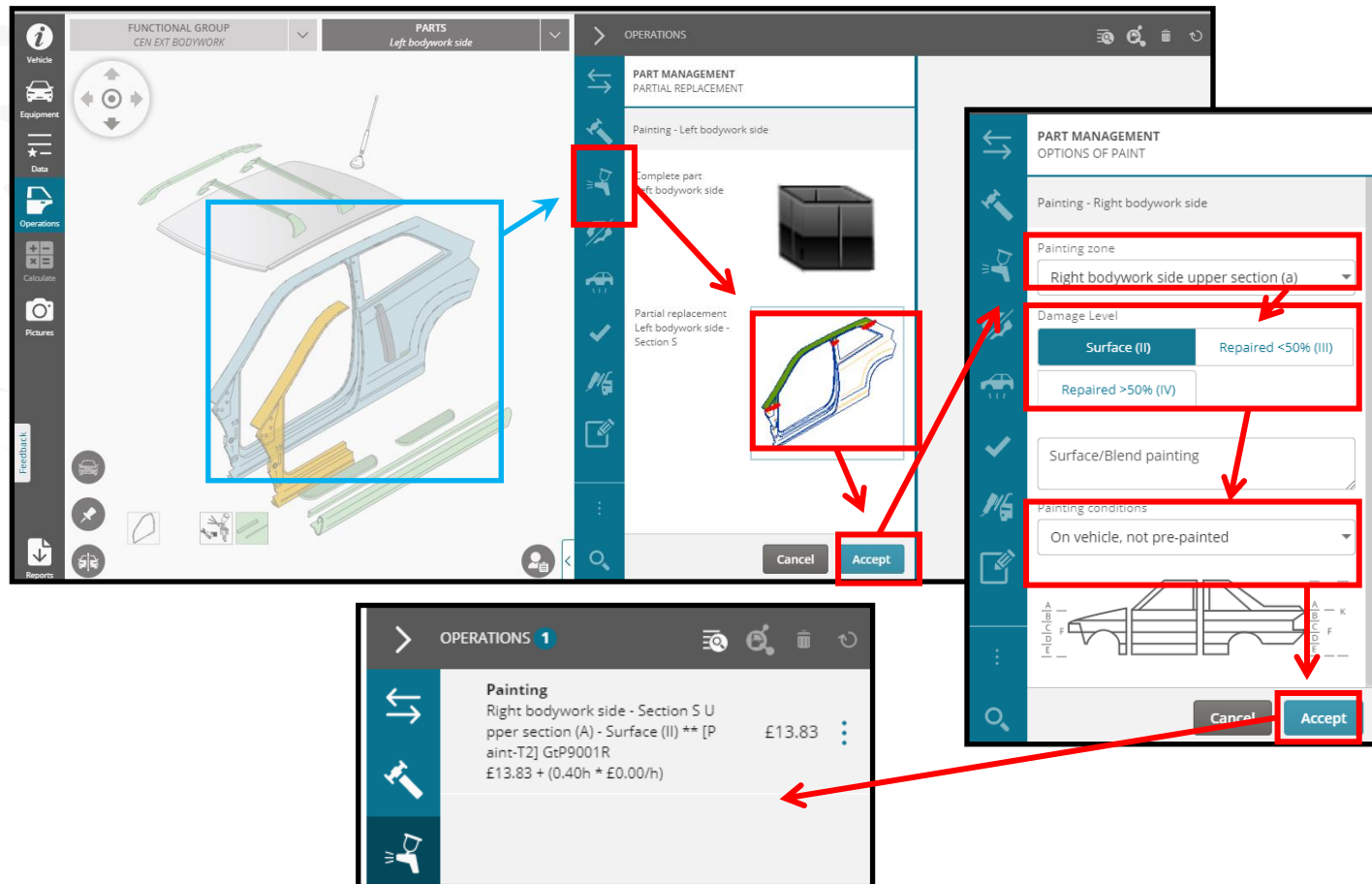
**Painting**  
Bonnet - New Part (I) - Parts removed \*\* [Paint-T2] GtP70010 £331.40  
£251.40 + (2h \* £40.00/h)

**Replace**  
Left headlamp \*\* [Panel-T1] 8117 £235.92  
005163  
£183.92 + (1.30h \* £40.00/h)

# Adding a Paint Operation (Part 2)

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When a body part can be **partially replaced or painted** (Eg.: A complete body side), a slide-out menu is deployed where you can choose whether to replace the part **completely** or **partially**. Make your selection and **"Accept"**. You will then be required to select the **Paint Options** (Painting Zone, Damage Level, Painting Conditions <"Parts removed", "On vehicle, not pre-painted" or "On vehicle, pre-painted">). Make your selection and **"Accept"** to add the paint operation to the Operations List:



# Modifying an Operation

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If you wish to **modify** or **delete** an operation or item you've added to the estimate, click on the **"three little dots"** icon situated next to the operation/Item.

The image shows two screenshots of a software interface. The left screenshot displays a list of operations under the heading 'OPERATIONS 3'. The operations listed are:

- Replace**: Rear left wing - Section M \*\* [Panel-T2] 6161205140, £833.03, £389.03 + (11.10h \* £40.00/h)
- Painting**: Bonnet - New Part (I) - Parts removed \*\* [Paint-T2] GtP70010, £251.40 + (2h \* £40.00/h)
- Replace**: Left headlamp \*\* [Panel-T1] 8117 005163, £183.92 + (1.30h \* £40.00/h)

Each operation has a 'three little dots' icon to its right. A red box highlights the 'Modify' and 'Delete' options in the dropdown menu that appears when the 'three little dots' icon is clicked. A blue box highlights the 'Delete' option. A red arrow points from the 'Modify' option to the right screenshot. A blue arrow points from the 'Delete' option to the left screenshot.

The right screenshot shows the detailed view of the 'Replace' operation. The details are:

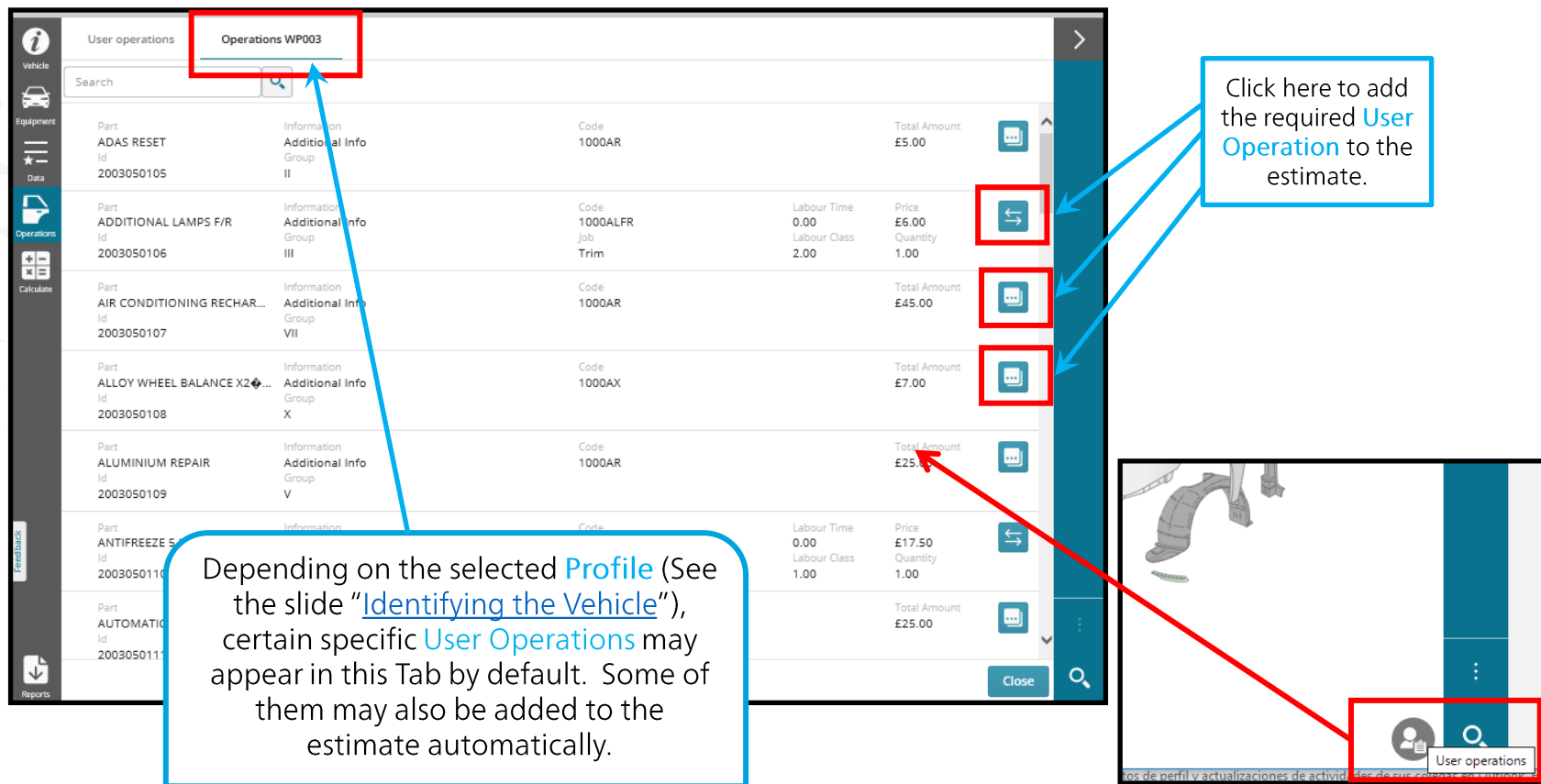
- Part code**: 6161205140
- Price (£)**: 389.03
- Quantity**: 1
- Depreciation (%)**: 0
- Labour time (h)**: 11.1

At the bottom, there are 'Cancel' and 'Accept' buttons. A red box highlights the 'Accept' button.

Click here to **delete** the operation/item from the estimate.

When you **"Modify"**, a drop down menu will appear where you'll be able to modify the part number, price, labour time, etc..

In the bottom right hand corner of the “Operations Selection” screen you’ll find the icon to access the list of all the necessary “User Operations” that have been set-up by the Work Provider. Use the “Search” function to quickly find the User Operation you need and include it in the estimate:



Click here to add the required **User Operation** to the estimate.

Depending on the selected **Profile** (See the slide “[Identifying the Vehicle](#)”), certain specific **User Operations** may appear in this Tab by default. Some of them may also be added to the estimate automatically.

Part	Information	Code	Labour Time	Price	Total Amount
ADAS RESET Id 2003050105	Additional Info Group II	1000AR			£5.00
ADDITIONAL LAMPS F/R Id 2003050106	Additional Info Group III	1000ALFR Job Trim	0.00 Labour Class 2.00	£6.00 Quantity 1.00	
AIR CONDITIONING RECHAR...	Additional Info Group VII	1000AR			£45.00
ALLOY WHEEL BALANCE X2...	Additional Info Group X	1000AX			£7.00
ALUMINIUM REPAIR Id 2003050109	Additional Info Group V	1000AR			£25.00
ANTIFREEZE S...			0.00 Labour Class 1.00	£17.50 Quantity 1.00	
AUTOMATIC					£25.00

Close

User operations



You can also create a new "User Operation" by clicking on the "Add" icon situated above to the right. Fill-in the required information regarding the **Part Name**, **Code**, **Information**, **Task**, **Job**, **Labour Class**, **Quantity**, **Price** and **Labour time**, and lick on "Accept":

The image shows a mobile application interface for 'User Operations'. The main screen displays a list of operations under the 'User operations' tab. A red box highlights the 'User operations' tab, and a blue callout points to it with the text: 'The list of your own User Operations can be found in this Tab.' Another red box highlights a '+' icon in the top right corner of the list, with a blue callout pointing to it: 'Click here to add a new User Operation to the estimate.' A third red box highlights the 'Save to My Operations' toggle switch at the bottom of the 'Add User Operation' form, with a blue callout pointing to it: 'Activate the "Save to My Operations" function if you want to save the User Operation for future use.' The 'Add User Operation' form is shown on the right, with fields for Part, Code, Information, Task, Job, Labour Class, Quantity, Price, and Labour time. The 'Save to My Operations' toggle is currently turned on. The 'Accept' button is also highlighted with a red box.

Click here to add a new User Operation to the estimate.

The list of your own User Operations can be found in this Tab.

Fill-in the required information regarding the **Part Name**, **Code**, **Information**, **Task**, **Job**, **Labour Class**, **Quantity**, **Price** and **Labour time**, and lick on "Accept".

Activate the "Save to My Operations" function if you want to save the User Operation for future use.

ADD USER OPERATION

Part  
PART/ITEM NAME

Code  
002

Information  
NON OBLIGATORY FIELD

Task  
Replace

Job  
Mechanics Panel Paint  
Electrical Trim

Labour Class  
T1 T2 T3

Quantity  
1

Price  
35

Labour time  
2

Group

Save to My Operations ☒

Cancel Accept



# User Operations (Part 3)

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If you choose to add a new **User Operation** that is a **Specialist** charge, you can opt to **Exclude Tax from that operation**, and/or enter a **negative amount**:

You can opt to add a **negative amount**.

Opt to **Exclude the Tax from the Specialist Charge** here.

The screenshot shows the 'ADD USER OPERATION' form. The 'Task' dropdown is set to 'Specialist'. The 'Total Amount' field contains '300'. The 'Excluding tax' toggle is turned on. A callout box shows a zoomed-in view of the 'Total Amount' field with a red box around the value '300' and a red arrow pointing to the 'Total Amount' label. Another callout box shows a zoomed-in view of the 'Excluding tax' toggle with a red box around the toggle and a red arrow pointing to the 'Excluding tax' label. A third callout box shows a zoomed-in view of the 'Total Amount' field with a red box around the value '-35' and a red arrow pointing to the 'Total Amount' label.

Field	Value
Part	DECAL
Code	005
Information	CAR DECALS
Task	Specialist
Total Amount	300
Group	
Excluding tax	<input checked="" type="checkbox"/>
Save to My Operations	<input checked="" type="checkbox"/>

Cancel Accept

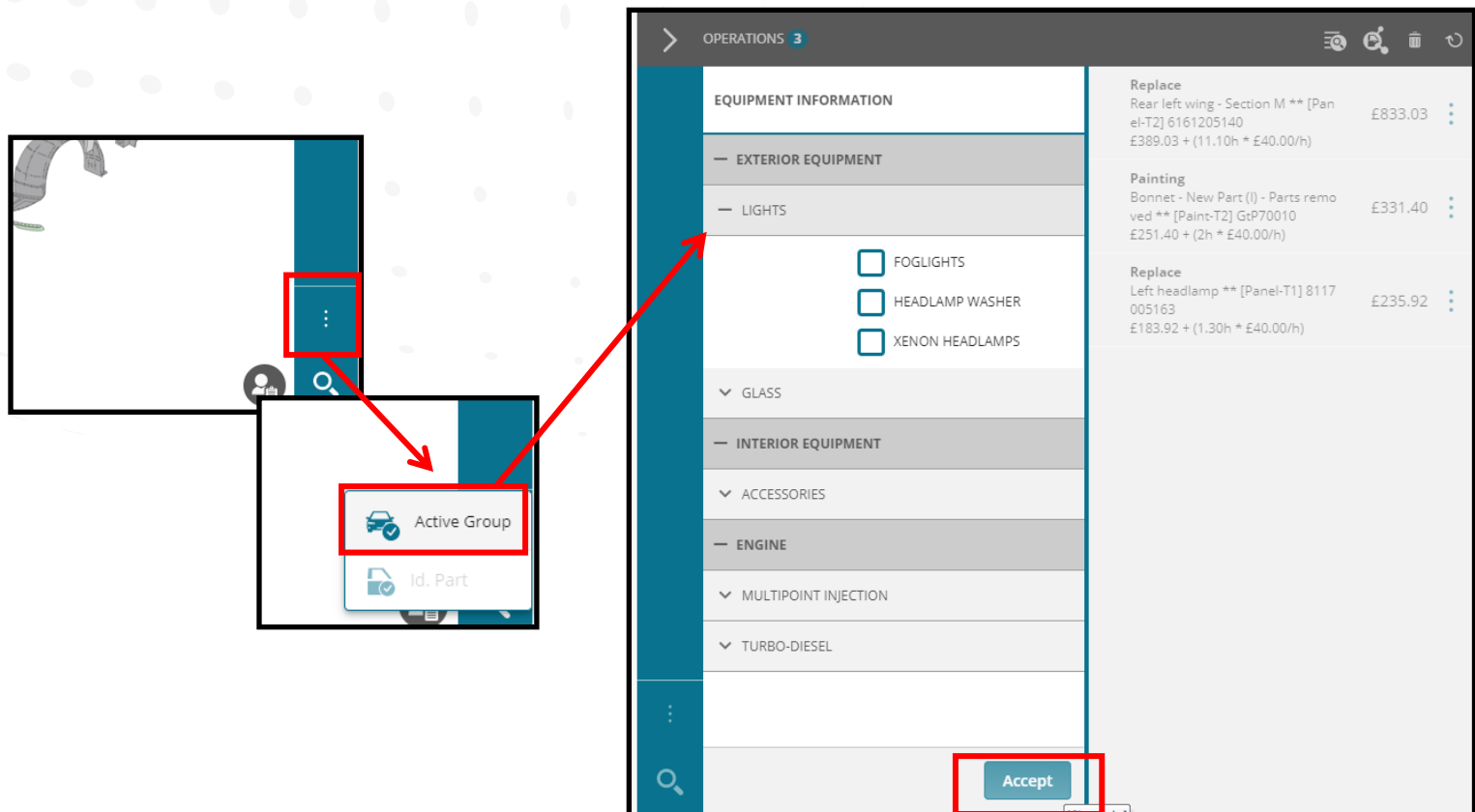
# The Active Group Function

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When a user selects a functional group the graphics that are displayed depend upon the selected equipment.

There is a way of reviewing and checking the equipment items that have an influence on the functional group the User is working with by clicking on the "Active Group" icon.

Once the equipment has been reviewed/modified, click on the "Accept":

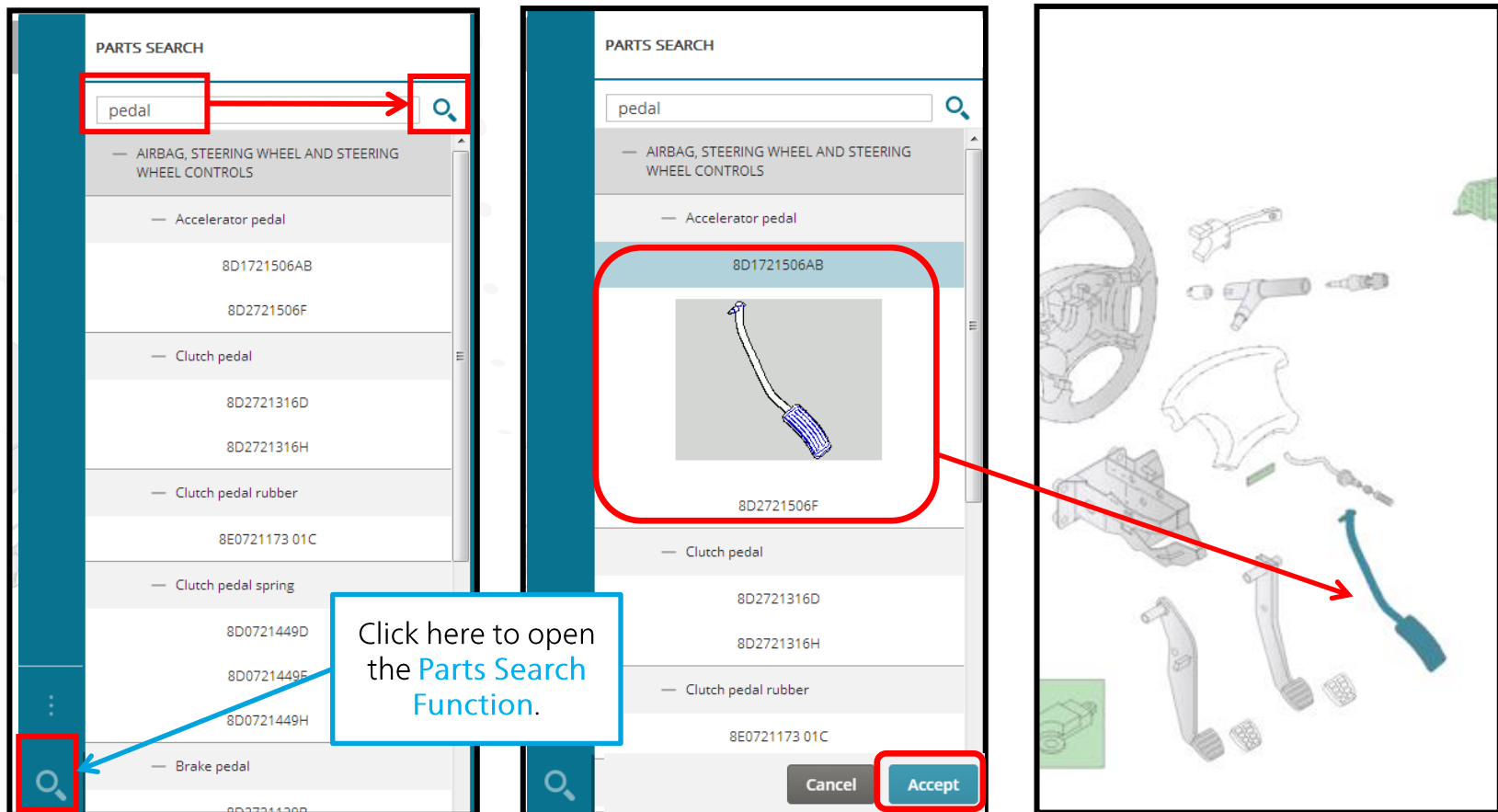


# The Parts Search Function

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GT Estimate also has a **Parts Search function** where you can search for a part using the name or reference number. Write the complete or portion (4 characters minimum) of the **part name** or **complete reference number** in the box and click on the **"Find"** icon.

Select the desired part from the results list and GT Estimate will display a diagram of the part (If available). Validate the selected part you are searching for by clicking on **"Accept"**. You will then be led to the functional group where the part is located and it will be highlighted in blue ready for you to add to the estimate if you so wish.



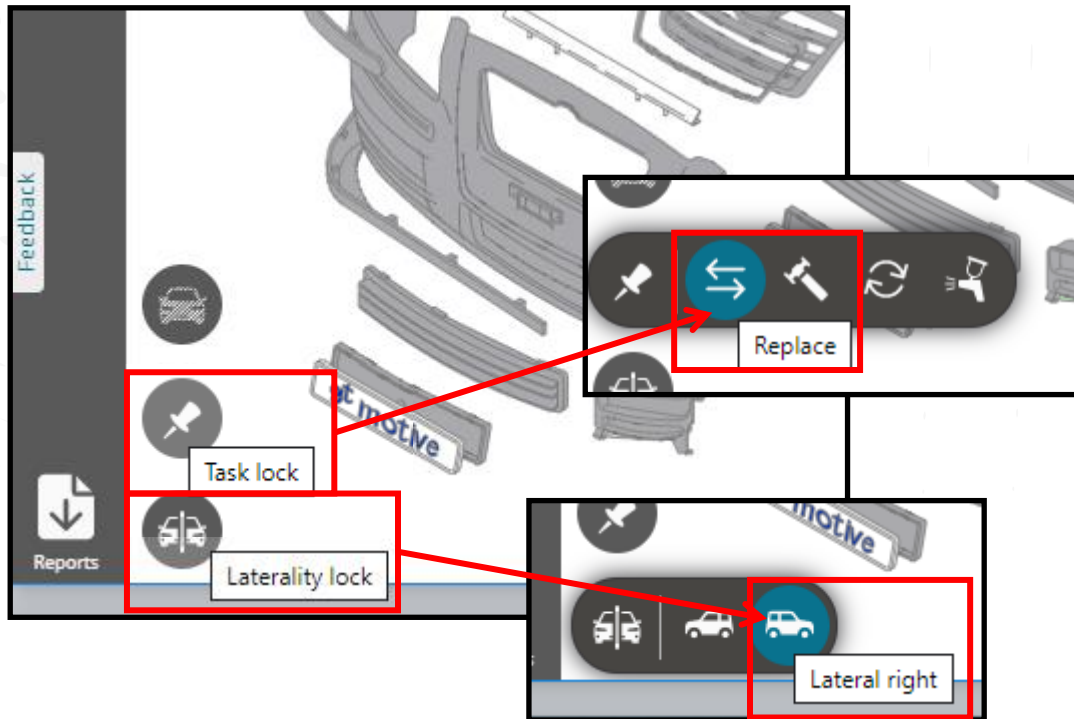
# The Laterality and Task Lock Functions

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You can also use the “**Laterality**” and “**Task Lock**” Functions. Use these functions to lock which side of the vehicle you wish to work with and/or the task you wish to perform on each part.

When you apply the **laterality lock**, only those parts belonging to the locked side of the vehicle will be made available to avoid any possible mistakes in the estimate.

Also, to save time on creating the estimate, you can **lock the task** (When you know that all the parts you are going to select are going to be replacements for example). With the task function locked, by clicking on a part it will be added directly to the estimate with no further clicks.



# Calculating an Estimate – The Results Screen (Part 1)

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Once all the operations have been included in the estimate, click on **"Calculate"**. At this point you will be led to the **Results Screen** with the summary of the parts and operations that have been included.

In addition, you can determine in the **"Job Status"** box whether the estimate you are sending is **"Job Status: Open"**, that is to say an **"advance"**, or **"Job Status: Closed"** if its the **final estimate**. Finally, click on the **"Send"** button for the estimate to be sent through to **GT GLOBAL**.

The screenshot shows the 'Estimate' screen for vehicle CLM822 (AUDI A1). The interface includes a left sidebar with icons for Vehicle, Equipment, Data, and Operations. The main area displays a table of parts and operations. A 'Job Status' box at the top right allows selecting 'Open' or 'Closed'. A 'Calculate' icon is located in the bottom left of the sidebar. A 'Send' button is in the top right corner. A 'Total breakdown' panel on the right shows a summary of costs. Annotations with arrows point to the 'Open/Closed' status box, the 'Calculate' icon, the 'Send' button, and the 'Total breakdown' panel.

Click here to declare the estimate **Open** or **Closed**.

**Calculate** icon.

Finally, click on the **"Send"** button for the estimate to be sent through to **GT GLOBAL**.

Click on the amount to deploy and contract the estimate **"breakdown"**.

Code	Description	Quantity	Price
82A941773A	Left headlamp	1.00	746.26
SEE PARTS BREAKDOWN	Left headlamp mounting kit	0.00	0.00
I WHT007527	REAR BOLT	1.00	0.75
I N 10512701	LOWER BOLT	2.00	0.51
I N 91256301	UPPER BOLT	2.00	0.43
I N 90931301	LOWER CLIP	2.00	0.98
	REAR NUT	1.00	4.41
	FRONT BOLT	1.00	0.27
	FRONT NUT	1.00	4.01
	Bonnet	1.00	
	Bonnet mounting kit	4.00	
	Left front wing	1.00	

Category	Amount
Parts	£1,163.40
Labour	£95.20
Paint	£497.38
Discount	£-263.40
Tax base	£1,492.58
Total excl. Excess	£1,492.58
Excess	£-150.00
Total	£1,342.58

# Calculating an Estimate – The Results Screen (Part 2)

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From the [Results Screen](#) you can also **modify** an item or operation.

Click on the little **pencil icon** situated to the right of each line. A drop down menu will appear where you can modify the **part number**, **part description**, **quantity**, **price** and **apply an increase or discount** (I/D, I/D (%) fields):

The screenshot shows the 'CLM822' results screen for an Audi A1 (GB) Sportback (18-) Sport. The table lists parts and their prices. The first item, 'Left headlamp', is highlighted with red boxes around its fields: Code (82A941773A), Description (Left headlamp), Quantity (1.00), Price (746.26), I/D (0.00), and I/D (%) (0.00). Blue arrows point from these fields to callout boxes explaining how to modify them. A red box highlights the 'Accept' button.

Code	Description	Quantity	Price	I/D	I/D (%)	Deprecation (%)	Total
82A941773A	Left headlamp	1.00	746.26	0.00	0.00	0.00	746.26
SEE PARTS BREAKDOWN	Left headlamp mounting kit	0.00	0.00	0.00	0.00		13.28
I WHT007527	REAR BOLT	1.00	0.75	0.00	0.00		0.75
I N 10512701	LOWER BOLT	2.00	0.51	0.00	0.00		1.02
I N 91256301	UPPER BOLT	2.00	0.43	0.00	0.00		0.86
I N 90931301	LOWER CLAMP	2.00	0.98	0.00	0.00		1.96
I WHT003214	REAR NUT	1.00					

Modify here the part number.

Modify here the description.

Modify here the quantity and price.

Apply an increase or discount by a fixed amount ("I/D" field) or by a percentage ("I/D(%)" field).



# GT Global

## Creating a Z-Manual Estimate

# Creating a Z-Manual Estimate

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The **Z-Manual** function allows the User to create an estimate completely manually (With manual prices and labour times) for a vehicle that is not available in the GT Motive model data base.

Select from the Make field the make **Z-Manual**, and then select from the Model field the **type of vehicle it is**. Next enter the **real make and model of the vehicle**. You can then continue the estimate as usual where when you add an operation to the estimate, you'll be required to enter the prices and labour times manually.

Information

39 INNOCENTI | A112 | TESTREGNO

Estimate identification

Estimate No: 39

User code: GT MOTIVE UK - training - GtEstimate

Vehicle data

Miles: 0

Reg. No: TESTREGNO

VIN: AB12...

Make: Z-MANUAL

Model: PASSENGER CAR (\*\*\*)

Introduce here the real make and model of the vehicle.

OPERATION MANAGEMENT

REPLACE - FULL LEFT HEADLAMP

Part code: EM6100L

Price (£): 135

Quantity: 1

Depreciation (%): 0

Select from the Make field the make **Z-Manual**, and then select from the Model field the **type of vehicle it is**.

You can then continue the estimate as usual where when you add an operation to the estimate, you'll be required to enter the prices and labour times manually.



# Using Manual Paint System (Part 1)

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When using the **Z-Manual** function, or if you opt to do so in a normal estimate, you will need to use the **Manual Paint System**.

You can select the **Manual Paint** option from the **Paint** section of the **Data** Screen.

From this screen you can also set any **fixed amounts** for **paint**, **labour**, **labour time** and **paint materials**.

The screenshot shows the 'Manual Paint System' interface. On the left sidebar, the 'Data' menu item is highlighted with a red box. The 'Paint' option in the 'Hourly labour rates' section is also highlighted with a red box. The 'Manual' option under the 'System' dropdown is highlighted with a red box. A blue box highlights the 'Fix amount', 'Labour amount', 'Labour time', and 'Material amount' input fields, with an arrow pointing to them from a text box that says 'Enter any fixed amounts for paint, labour, labour time and paint materials here.' The 'Fix amount' field contains '0'. The 'Labour amount' field contains '0'. The 'Labour time' field contains '0'. The 'Material amount' field contains '0'.

System	Manufacturer	Without paint	AZT
Manual			

☆ Fix amount

☆ Labour amount

☆ Labour time

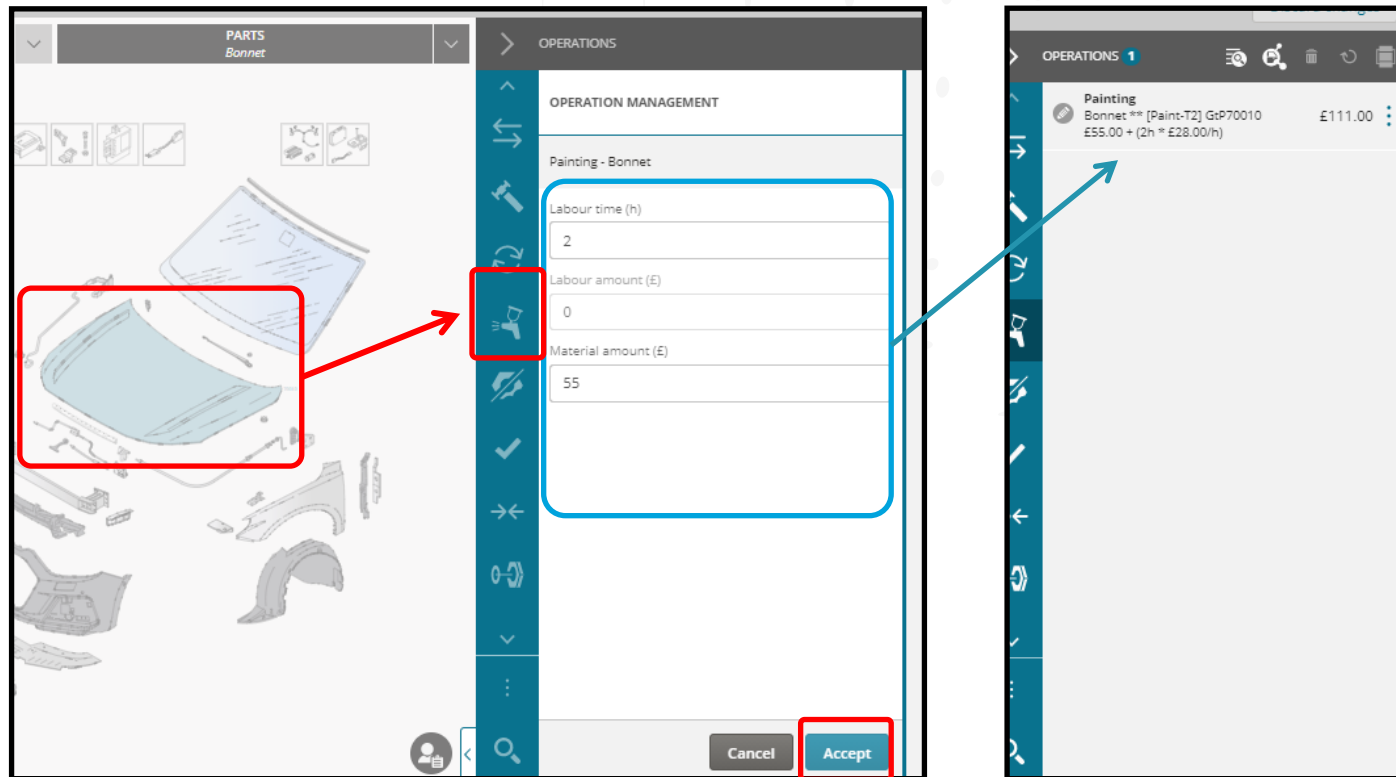
☆ Material amount

# Using Manual Paint System (Part 2)

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Alternatively, when using **Manual Paint**, you can either opt to enter the fixed paint amounts as shown in the previous slide, or you can enter the paint information when adding an operation to the estimate.

Select a part or panel and click on Paint, a slide-out menu will appear where you'll be required to enter the **Labour Time**, or **Amount** and the **Materials** amount:

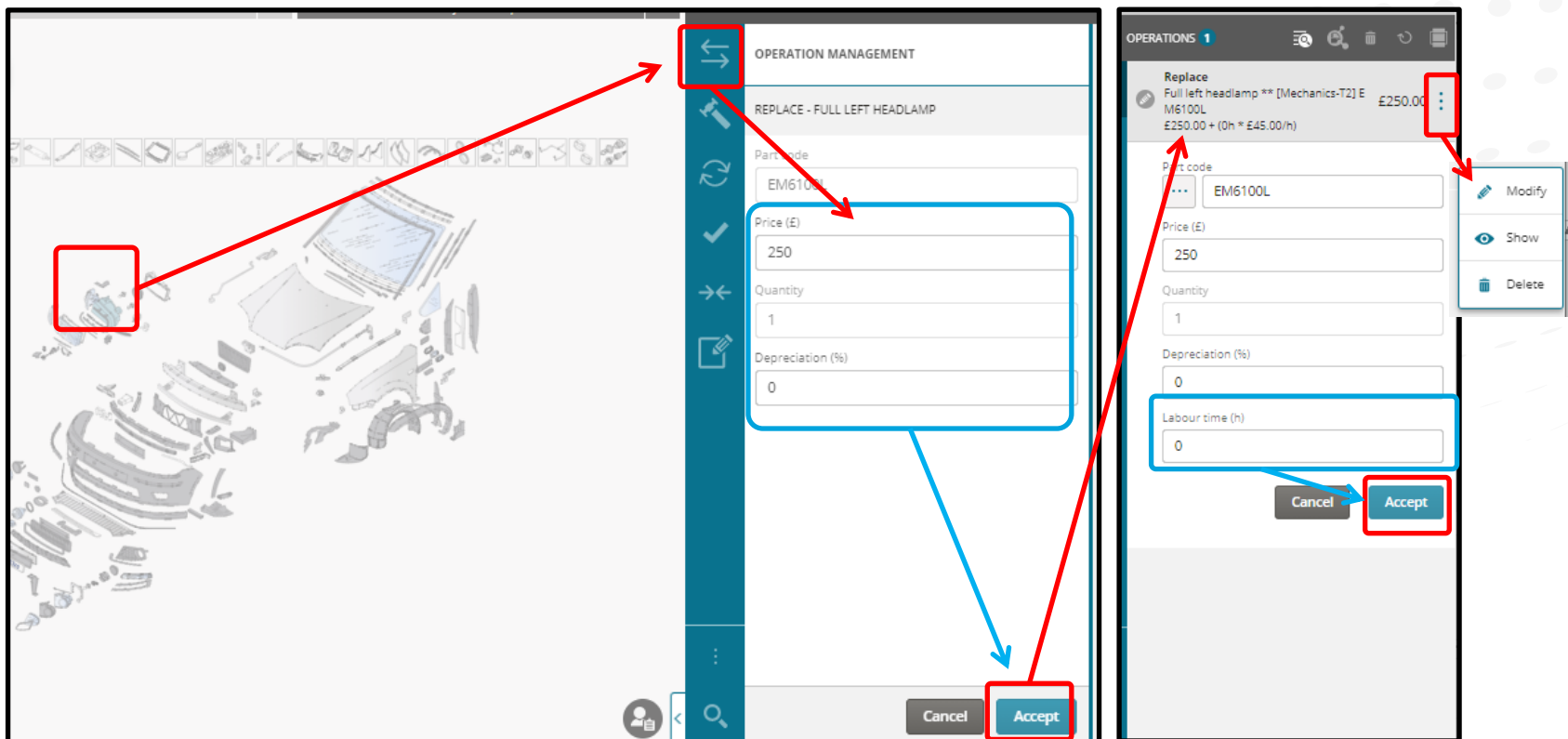


# Adding a Part in a Z-Manual Estimate

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When adding a part in a **Z-Manual** estimate, you can do so in the same way as a normal estimate. Select the part and choose the task. You will be required to enter the part price.

To enter the Labour Time, **modify the operation once it's added to the operations list** and **enter the labour time**:





# GT Global

Sending the Estimate to GT GLOBAL

# Sending the Estimate to GT Global

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Once all the operations have been included in the estimate, and you have calculated it, click on the **"Send"** button for the estimate to be sent through to **GT GLOBAL**.

**Calculate Icon.**

**Finally, click on the "Send" button for the estimate to be sent through to GT GLOBAL.**

**Estimate**

CLM822 AUDI | A1 (GB) SPORTBACK (18-) | SPORTBACK TFSI SPORT | £1,342.58

Discard changes

**Send**

**Total breakdown**

Parts	£1,163.40
Labour	£95.20
Paint	£497.38
Discount	£-263.40
Tax base	£1,492.58
Total excl. Excess	£1,492.58
Excess	£-150.00
Total	£1,342.58

Code	Description	Quantity	Price
82A941773A	Left headlamp	1.00	746.26
SEE PARTS BREAKDOWN	Left headlamp mounting kit	0.00	0.00
I WHT007527	REAR BOLT	1.00	0.75
I N 10512701	LOWER BOLT	2.00	0.51
I N 91256301	UPPER BOLT	2.00	0.43
I N 90931301	LOWER CLAMP	2.00	0.98
I WHT003214	REAR NUT	1.00	4.41
		1.00	0.27
		1.00	4.01
		1.00	317.57
		4.00	0.60
		1.00	142.09

# A Closer Look at the Estimate Management Card

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Once you click on the Send icon situated within [GT Estimate](#), the estimate information will be sent through to [GT GLOBAL](#) and the [Estimate Management Card](#) will be updated as below.

Let's have a closer look at the information contained in the [Estimate Management Card](#):

The screenshot shows the 'Estimate v.0.1' card. It features a large blue total of £1,552.42. Below this, it lists the Estimator as 'Training Repairer', the Eng. Company as 'GT Motive Insurance', and the Managed By as 'Training Engineer'. On the right side, there is a 'Modify' button, a 'Rules Warning' icon, a 'Status' box showing '14/07/2021 03:46 PM' and 'In Review (Eng.)', and a 'Final Indicator' box showing 'No'. Callouts provide detailed explanations for these elements.

**Estimate v.0.1**

**£1,552.42**

Estimator  
Training Repairer

Eng. Company  
GT Motive Insurance

Managed By  
Training Engineer

**Modify**

**Rules Warning**

**Status**  
14/07/2021 03:46 PM  
● In Review (Eng.)

**Final Indicator**  
No

Click here to access [GT Estimate](#) and [modify](#) the estimate if needed.

[Audit Rules Message](#). See section ["Audit Rules"](#).

[Status of the Job](#). This will denote the status of the Job and where it is to be found in the Estimates Grid of [GT GLOBAL](#).

[Total Loss Indicator](#). This icon will be displayed depending on what has been established in the "Vehicle Attributes" area of GT Estimate.

[Final Indicator](#) will display "Yes" or "No" depending on whether the Estimate has been declared "Open" or "Closed". See section ["Calculating the Estimate / The Results Screen"](#).



# GT Global

## Audit Rules

A series of **Audit Rules** are set-up in **GT GLOBAL**.

When you send the estimate from **GT Estimate** to **GT GLOBAL**, the **Audit Rules** will check that the estimate has been created correctly. A message will appear in the **Estimate Management Card** with **"Rules Passed"** or **"Rules Warning"**:



*Rules Passed*

**"Rules Passed":** The estimate has passed the Audit Rules.



*Rules Warning*

**"Rules Warning":** The estimate has NOT passed the Audit Rules\*.

These **Audit Rules** will check the estimate created in **GT Estimate** with such things as:

- Whether any parts prices have been modified manually.
- Whether any labour times have been modified manually.
- That no mechanical parts have been added to the estimate.
- Any other rules or conditions that might be established by the Work Provider/Insurance Company.



If a "Rules Warning" message appears when you send the estimate from [GT Estimate](#) to [GT GLOBAL](#), you can obtain further information of the Audit Rules that have not been complied with by clicking on the [Rules Warning](#) icon of the [Estimate Management Card](#):

The image shows a screenshot of the 'Estimate v.2.1' card and a pop-up 'Audit Rules' dialog box. The 'Estimate v.2.1' card displays a total value of £1,494.61, the estimator 'Training Engineer', and a status of 'In Review (Eng.)'. A red box highlights the 'Rules Warning' icon. A blue callout box points to the 'Modify' button, stating: 'At this stage you can opt to [Modify](#) the estimate to make it comply with the Audit Rules.' A red arrow points from the 'Rules Warning' icon to the 'Audit Rules' dialog box, which shows a warning message: 'The price has been modified: (Left front wheel arch protector - Proposed: 31.51 - Modified: 70.0)'.

**Estimate v.2.1**

**£1,494.61**

Estimator  
Training Engineer

Eng. Company

Managed By  
Training Engineer

Status  
05/05/2021 02:39 PM

● In Review (Eng.)

Final Indicator  
Yes

[Modify](#)

**Rules Warning**

At this stage you can opt to [Modify](#) the estimate to make it comply with the Audit Rules.

**Audit Rules**

Description

⚠ The price has been modified: (Left front wheel arch protector - Proposed: 31.51 - Modified: 70.0)



# GT Global

## Reviewing the Estimate

Once the estimate has been created by the Repairer, they have attached photos and completed all the necessary information, they will send the estimate through to the Work Provider for it to be approved.

If the estimate does not comply with the [Auto-Approve Rules](#) set/up in [GT GLOBAL](#), the Job will be transferred to the **"Awaiting Acceptance (Eng.)"** area of the [Estimates Grid](#), ready and waiting for the Engineer to review the Job as can be seen below:

The screenshot displays the GT GLOBAL web application interface. On the left sidebar, the 'Awaiting Acceptance (Eng.)' menu item is highlighted with a red box. The main content area shows a table of estimates, with the first row highlighted by a red border. This row represents an estimate with the claim number 'TRAINING00007...' and a status of 'Awaiting Acceptance'. The table includes columns for various details such as Work Provider, Eng. Company, Registration Number, Gross Total, Status/Reason, Managed By, Repairer, and Date Created / Modified.

Claim Number	Work Provider	Eng. Company	Registration Number	Gross Total	Status/Reason	Managed By	Repairer	Date Created / Modified
TRAINING00007...	WP005	GT Motive Ins...		£1,152... (7.56...	Awaiting Acceptance	Training Engin...	Training Repai...	01/12/2020, 02:07...
	Without Prejudice	Company	Make	Model	Version	Compliance	Excess	Inspection Site Location
	No	GT Motive Ins...	AUDI	A1	0.1	Warning		Other
	VAT Registered	VAT Portion Payabl	Collection Requirec	Collection Providc	Courtesy Car Requir	Courtesy Car Provi	Type of Damage	Able to Authorise
	No	0	Yes		Yes			Yes

# Reviewing the Estimate (Part 2)

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Click on the estimate amount in the [Estimate Management Card](#) to review the [GT Estimate Report](#). Click on **"Modify"** to modify the estimate if required, or **"Download"** if you wish to download the pdf of the report. You can return to the job overview from the estimate report area by clicking on **"Done"**.

The screenshot displays the GT Motive software interface. On the left is a sidebar with navigation options: Instructions, Estimates, Active, In Progress, In Review (Rep.), In Review (Eng.), Awaiting Acceptance (Rep.), Awaiting Acceptance (Eng.), Authorised, Total Loss, Closed, All, Invoices, and Training Engineer. The main area shows the 'Estimate Management Card' for 'MARK SMITH | AUDI A1 (GB) SPORTBACK (18-)'. It includes a profile picture, name, and role. Below this is a 'Summary' tab with a 'Policyholder' section showing insured details and contact information. A red box highlights the estimate amount '£2,506.75'. To the right of the card is a 'GT Estimate Report' for 'Version 0.1'. It features a large '£2,506.75' amount, a 'Download' button, a 'Modify' button, and a 'Done' button (all highlighted with a red box). The report includes 'Estimate Details' (Job Status: Open, Estimate ID: CLM0677, Calc./Modif. Date: 15/07/2021 09:47:49), 'Vehicle Details' (Miles: 35,000, Make - Model: AUDI A1 (GB) SPORTBACK (18-), Model Variant: SPORTBACK TFSI SPORT, Manufacturer: LBQA, Registration date: 2010-01-01, VIN: AU03401), and a 'Total Loss Management' section with a 'Total Loss' icon and 'Total Loss Management' text. A red arrow points from the '£2,506.75' in the card to the '£2,506.75' in the report.

Estimate Details	
Job Status	Open
Estimate ID	CLM0677
Calc./Modif. Date	15/07/2021 09:47:49

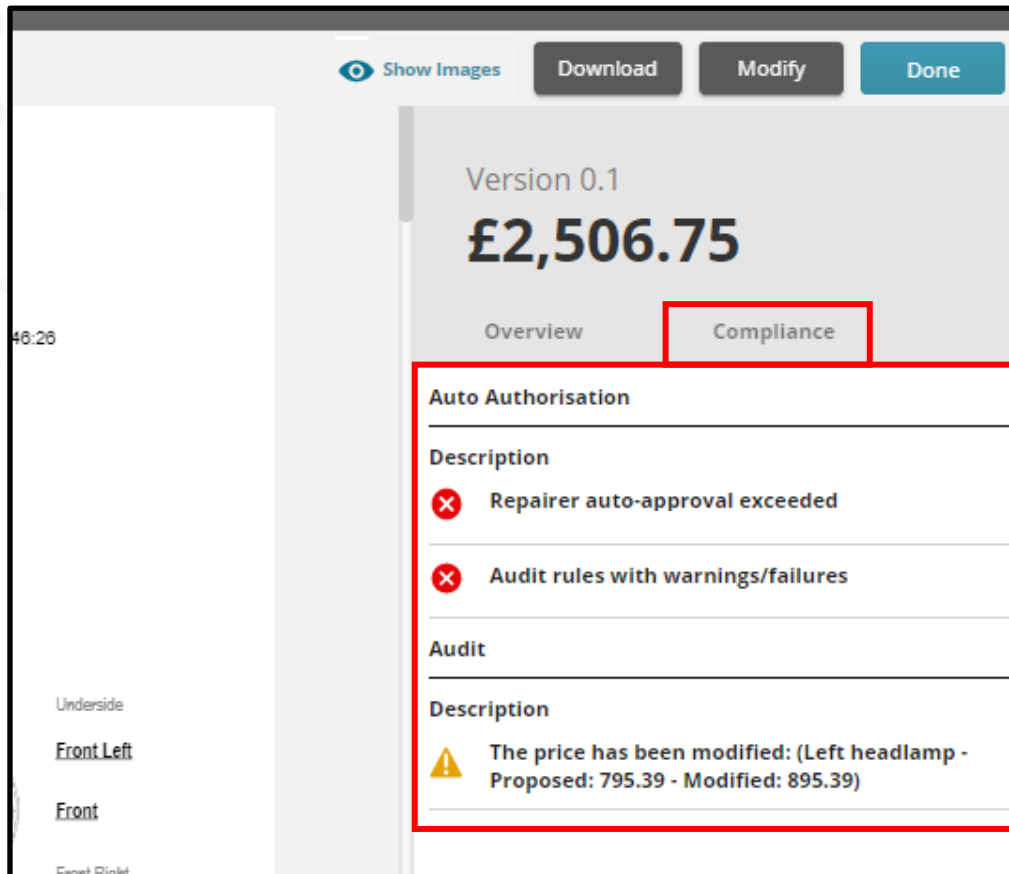
Vehicle Details	
Miles	35,000
Make - Model	AUDI A1 (GB) SPORTBACK (18-)
Model Variant	SPORTBACK TFSI SPORT
Manufacturer	LBQA
Registration date	2010-01-01
VIN	AU03401

Total Loss Management	
Total Loss	£200.00
Third Party Claim	Yes

# Reviewing the Estimate (Part 3)

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From the [GT Estimate Report](#) page click on the **"Compliance"** Tab to the right to see the results of the **"Auto-Authorisation"** and **"Audit"** Rules set-up in [GT Global](#):



## Reviewing the Estimate (Part 4)

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From the **GT Estimate Report** page click on “**Estimates**” above to the left to access the **Estimate history of the Job**:

The screenshot displays the GT Estimate Report interface for a job titled 'MARK HAMILTON | AUDI A1 | Training Repairer' with Claim Id: 1580. The 'Estimates' tab is selected, showing a list of estimate versions. A red box highlights the 'Estimates' tab, and a red arrow points to the 'Job Overview' tab. A blue box highlights the 'Previous Version' section, and a blue arrow points to the 'Estimate Details' section.

**Estimate Details**

Job Status	Closed
Estimate ID	CLM1580
Calc./Modif. Date	01/12/2020 14:04:02

**Vehicle Details**

**Estimate History**

Version	Estimate ID	Estimate Amount	Status	Compliance	Estimator	System	Eng. Company
Version 0.2	CLM1580	£1,198.29	Awaiting Acceptance (Rep.)	Passed	Training Engineer	GT Estimate	Training Engineer
Version 0.1	CLM1580	£1,573.72	Awaiting Acceptance (Rep.)	Warning	Training Repairer	GT Estimate	Training Engineer

Click on any of these icons to see the specific estimate report.

# Reviewing the Estimate (Part 5)

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In the Estimate history of the Job, you can click on **"View Changes"** to bring up a detailed and easy to understand report of the differences between this and the previous estimate:

The screenshot displays the 'Estimates' section of the GT Motive software. The main interface shows two estimate versions for 'PAUL SMITH | AUDI AI | Training Repairer'. The current estimate (Version 0.2) has a total of £1,198.29 and is marked as 'Final'. The previous estimate (Version 0.1) has a total of £1,573.72 and is marked as 'Warning'. A red box highlights the 'View Changes' button. An arrow points from this button to a 'Delta Report' window that is open. The 'Delta Report' window shows a comparison of the two estimates, highlighting changes in the 'General data' and 'Parts' sections. A blue box with an arrow points to the 'Delta Report' window, indicating where to view the differences.

**View here the "Delta Report" with the differences between this and the previous estimate.**

**Delta Report**

Common Data

Delta Report Creation Date	01/12/2020 15:58:11
Make	AUDI
Model	A1 (GB) SPORTBACK (18-)
UMC	AU03401

General data

Item	Original estimate	Modified estimate
Estimate number	CLM822	CLM822
User Id	afernandez	afernandez
Profile	21	21
State	Closed	Closed
Plate number		
VIN		
Calculation date	30/11/2020 15:57:21	30/11/2020 16:26:25
Fare Date	16/11/2020	16/11/2020
Paint System	AZT	AZT
Paint Type	Basecoat	Basecoat
Paint Finish Type	2-Coat	2-Coat
Paint Constant	False	False

Parts

Deleted

Code	Description	Units	Price	LD	LD %	Total
82A823029C	Bonnet	1	317.57	0	0	317.57

Added

Modified

Code	Description	Units	Price	LD	LD %	Total
82A941773A	Left headlamp	1	850	0	0	850
82A941773A	Left headlamp	1	746.26	0	0	746.26

Labour

# Reviewing the Estimate (Part 6)

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You can also “**View Changes**” between the different versions of the estimate from first to last by going to the **Estimate Report** page. Down below to the right you can select what versions of the estimate you would like to compare and click on “**View Changes**”:

**Estimate Details**

Job Status: Closed  
Estimate ID: CLM822  
Calc./Modif. Date: 30/11/2020 15:26:33

**Vehicle Details**

Miles: 35,000  
Make - Model: AUDI A1 (GB) SPORTBACK (18-)  
Model Variant: SPORTBACK TFSI SPORT  
Manufacturer: LB9A  
Colour Code:  
Registration No:

**Vehicle Condition**

Start Date:  
Type of Damage:  
Severity of Damage:  
General:  
Rear Left:  
Rear:  
Rear Right:  
Main impact direction:

**Delta Report**

Common Data

Delta Report Creation Date	30/11/2020 17:24:07
Make	AUDI
Model	A1 (GB) SPORTBACK (18-)
UMC	AU03401

General data

Item	Original estimate	Modified estimate
Estimate number	CLM822	CLM822
User Id	afernandez	afernandez
Profile	21	21
State	Closed	Closed
Plate number		
VIN		
Calculation date	30/11/2020 15:57:21	30/11/2020 16:26:25
Fare Date	16/11/2020	16/11/2020
Paint System	AZT	AZT
Paint Type	Basecoat	Basecoat
Paint Finish Type	2-Coat	2-Coat
Paint Constant	False	False

Parts

Code	Description	Units	Price	I/D	I/D %	Total
82A823029C	Bonnet	1	317.57	0	0	317.57

Deleted

Code	Description	Units	Price	I/D	I/D %	Total
82A941773A	Left headlamp	1	850	0	0	850
82A941773A	Left headlamp	1	746.26	0	0	746.26

Added

Code	Description	Units	Price	I/D	I/D %	Total
82A941773A	Left headlamp	1	850	0	0	850
82A941773A	Left headlamp	1	746.26	0	0	746.26

Modified

Code	Description	Units	Price	I/D	I/D %	Total
82A941773A	Left headlamp	1	850	0	0	850
82A941773A	Left headlamp	1	746.26	0	0	746.26

Select the versions of the estimate you would like to compare and click on “**View Changes**” to see the the “**Delta Report**” with the differences between this and any of the previous estimates.

**View Changes**

Version 0.2  
Version 0.1

Version 0.2  
Version 0.1



## Reviewing the Estimate (Part 7)

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Once you have reviewed the estimate and all the necessary information, click on the **Status Icon** in the **Estimate Information Card** to “**Authorise**”, declare the Job a “**Total Loss**”, “**Close**”, “**Share**” or “**Resend**”:

The screenshot shows a mobile application interface with a modal dialog titled "Update Estimate Status". The dialog has a close button (X) in the top right corner. Below the title, there are five radio button options: "Authorise", "Total Loss", "Close", "Share", and "Resend". These options are enclosed in a red rectangular box. Below the options is a text area labeled "Notes". A red arrow points from the "In Review (Eng.)" status icon in the background to the "Authorise" radio button. A blue arrow points from a text box to the "Notes" text area. The text box contains the following text: "Write a message in the Notes for the Repairer. If you choose to Authorise or declare this Job a Total Loss, these notes will appear in Comments section of the Authority Note and/or Total Loss Notification." The background of the app shows various fields like "Training Repairer", "Messages", "Reports", "Insurance", "GT M", "Claim", "TRAINI", "Able to Au", "Yes", "Policy Nu", "TRAINI", "Cortesy C", "Yes", "Total L", "71", "VAT", "0.0", "Cancel", "In Review (Eng.)", "Final Indicator", and "Yes".

Update Estimate Status

☐ Authorise ☐ Total Loss ☐ Close ☐ Share ☐ Resend

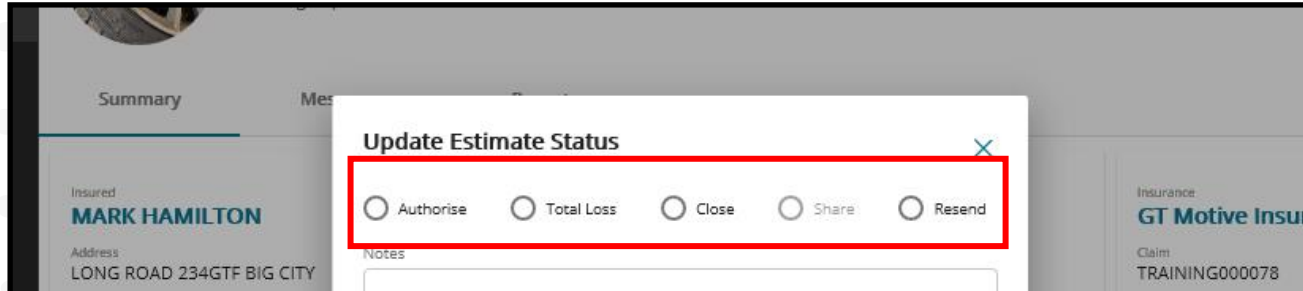
Notes

Write a message in the Notes for the Repairer. If you choose to Authorise or declare this Job a Total Loss, these notes will appear in Comments section of the Authority Note and/or Total Loss Notification.

Cancel

In Review (Eng.)

## Definitions:



**Authorise:** Use this option to manually approve the estimate. You can choose to make changes in the estimate beforehand.

**Total Loss:** Use this option to declare the estimate a Total Loss once you've completed the Total Loss Management Report (See section "[Managing a Total Loss](#)").

**Close:** Use this option if you wish to cancel the Job.

**Share:** Use this option when you've modified the estimate and want to share those changes with the repairer for them to accept.

**Resend:** Use this option along with a message to request the repairer to resend the estimate with any further information, images, documents or changes in the estimate you might require.



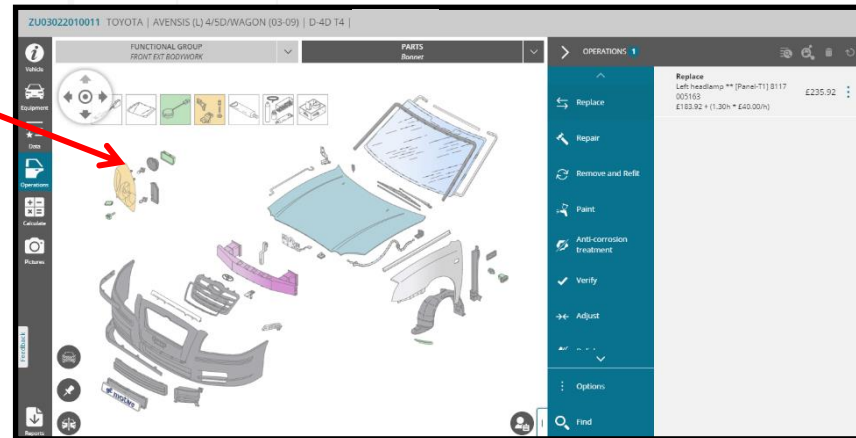
# GT Global

## Modifying the Estimate

# Modifying the Estimate (Part 1)

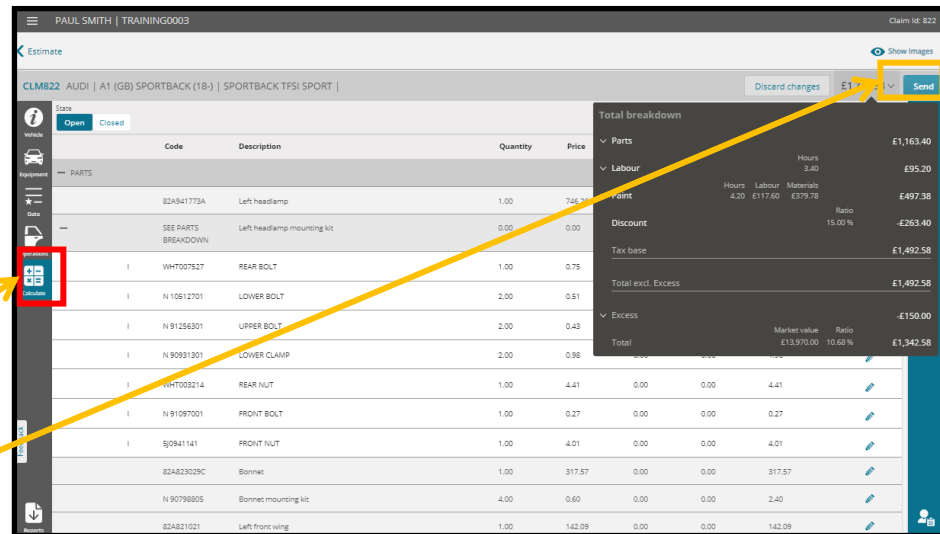
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To modify the estimate click on “Modify” within the **Estimate Management Card**:



Click here to access **GT Estimate** and **modify** the estimate if needed.

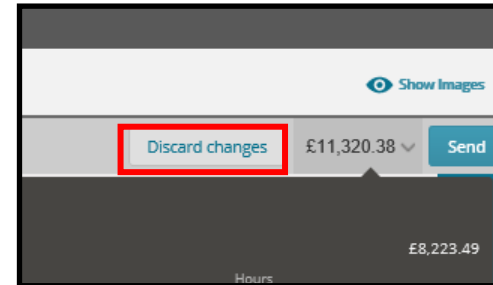
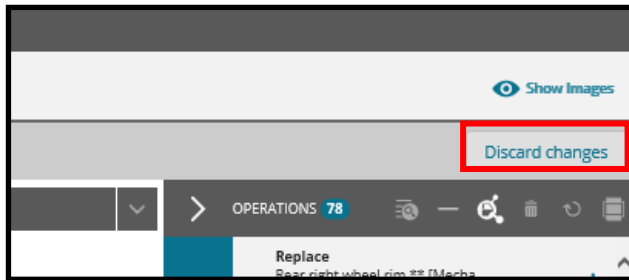
Remember to **Calculate** the estimate once you've made the changes and “**Send**” it to **GT GLOBAL**.



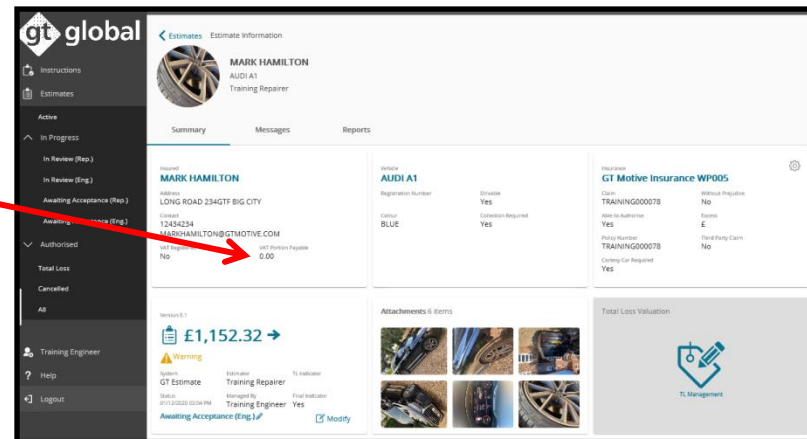
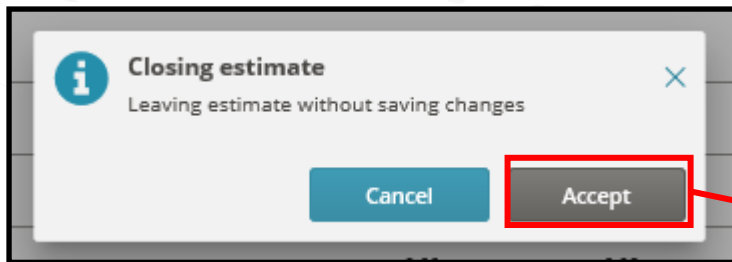
## Modifying the Estimate (Part 2)

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If you access the graphics to modify the estimate but finally decide to leave the estimate as it is, you can **discard** the changes you've made by clicking on **"Discard Changes"** above to right, be it from the Operations Selection Screen or from the Results Page:



A message will appear for you to confirm that you wish to discard the changes you've made and you'll be led back to the Estimate Management Card and the global view of the Job:





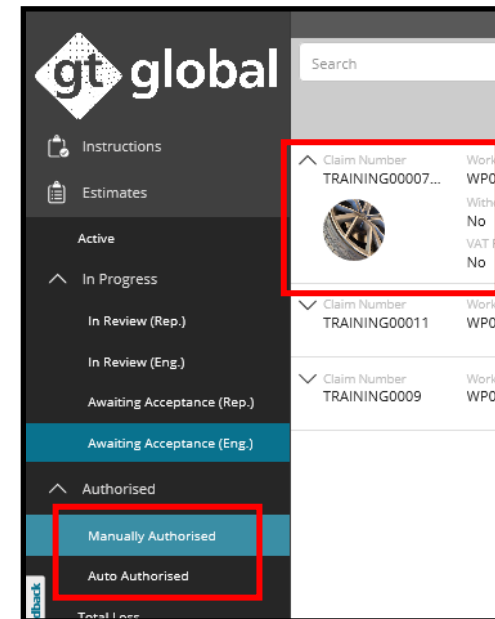
# GT Global

The Estimate is Approved / The  
Engineer's Report

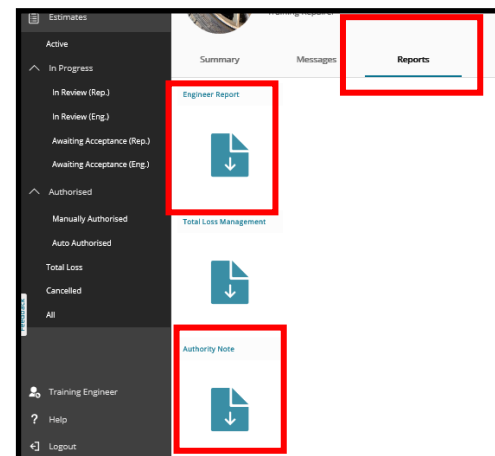
# | The Estimate is Approved / The Engineer's Report

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When a Job is Authorised it will be transferred to the **"Manually/Auto Authorised"** areas of the **Estimates Grid** accordingly:



When this happens in the **"Reports" Tab** of the Job you'll be able to download the **Engineer's Report** among other necessary documents:

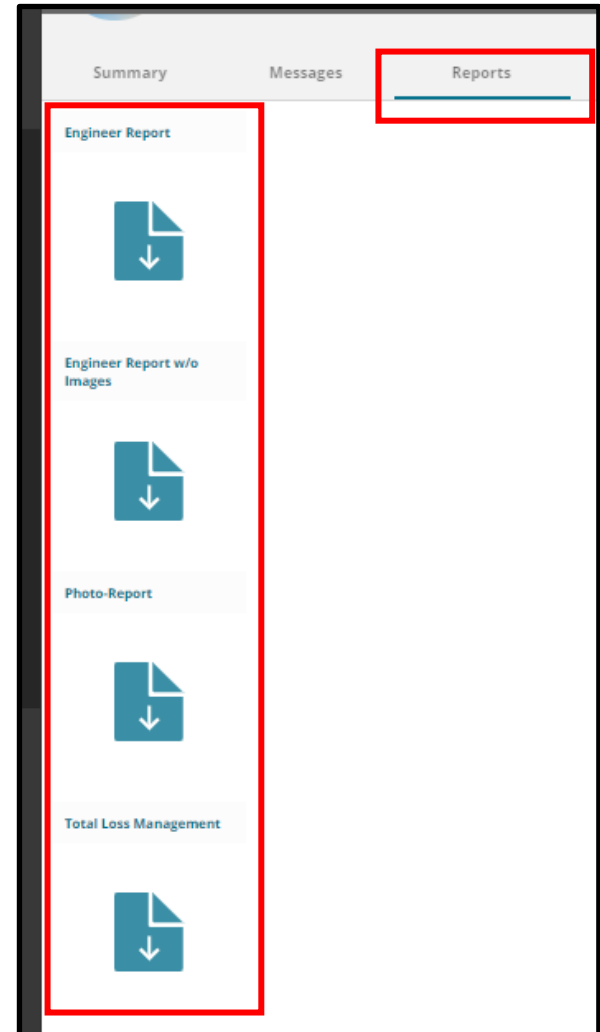


## | Other Available Reports

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Apart from the normal **Engineer's Report** (Which includes the photos), in the **Report's Tab** you can also find:

- Engineer's Report without Images.
- Photo Report (Report with only the images).
- Total Loss Management Report.







# GT Global

## Managing a Total Loss

# Managing a Total Loss (Part 1)

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To manage a Total Loss, click on the **Total Loss Management Card** of the Job where you'll be led to the **"Valuation"** and **"Total Loss Management"** areas:

The screenshot displays the GT Global interface for a Total Loss claim. The header shows the user 'MARK HAMILTON | AUDI A1 | TRAINING00011' and the 'Claim Id: 1381'. The left sidebar contains navigation options: Instructions, Estimates, Active, In Progress, In Review (Rep.), In Review (Eng.), Awaiting Acceptance (Rep.), Awaiting Acceptance (Eng.), Authorised, Total Loss, Cancelled, All, Training Engineer, Help, and Logout. The main content area is titled 'Estimates Estimate Information' and features a profile card for Mark Hamilton, an Audi A1 Training Repairer. Below this are tabs for Summary, Messages, and Reports. The Summary tab is active, showing details for the insured (Mark Hamilton), vehicle (Audi A1), and insurance (GT Motive Insurance WP005). A large blue box displays the total loss valuation of £11,1470.38, accompanied by a warning icon and a 'Warning' label. The bottom section includes a 'Total Loss Valuation' card with a 'TL Management' icon, which is highlighted with a red border. The interface also shows a grid of attachments and a 'Modify' button.

gt global

MARK HAMILTON | AUDI A1 | TRAINING00011 Claim Id: 1381

< Estimates Estimate Information

**MARK HAMILTON**  
AUDI A1  
Training Repairer

Summary Messages Reports

Insured  
**MARK HAMILTON**  
Address  
BIG STREET 234THY BIG TOWN  
Contact  
234235345  
MARKHAMILTON@GTMOTIVE.COM  
VAT Registered No VAT Portion Payable 0.00

Vehicle  
**AUDI A1**  
Registration Number  
Colour BLUE  
Drivable Yes  
Collection Required Yes

Insurance  
**GT Motive Insurance WP005**  
Claim TRAINING00011 Without Prejudice No  
Able to Authorise Yes Excess £150.00  
Policy Number TRAINING00011 Third Party Claim No  
Courtesy Car Required Yes

Version 0.2  
**£11,1470.38** →  
Warning  
System GT Estimate Estimator Training Repairer TL Indicator Yes  
Status 02/12/2020 10:41 AM Managed By Training Engineer Final Indicator Yes  
Awaiting Acceptance (Eng.) Modify

Attachments 6 items

Total Loss Valuation  
TL Management

# Managing a Total Loss (Part 2)

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Use the **"Valuation"** section to add as many valuations of the vehicle as are necessary to help you decide the total loss value of the vehicle. Click on **"New Valuation"** and introduce all the necessary information regarding the **Origin**, **Date**, **Base Value**, and **any increase/decrease** with regards to the **Millage**, **Condition**, **VRN** or **Options**. Click on **Create**:

The screenshot displays the GT Global Total Loss Management interface. The top header shows the user 'MARK HAMILTON' and the claim 'AUDI A1 | TRAINING00011' with a 'Claim Id: 1381'. The left sidebar contains navigation links: Instructions, Estimates, Active, In Progress, In Review (Rep.), In Review (Eng.), Awaiting Acceptance (Rep.), Awaiting Acceptance (Eng.), Authorised, Total Loss, Cancelled, and All. The main content area is titled 'Valuation' and 'Total Loss Management'. It features a form with fields for Make (AUDI), Model (A1), Registration Number (TESTREGNO), Registration Date, Mileage (45000), and Accident Date (2020-11-16). A table lists existing valuations, with one entry from 'GLASSES' dated '2020-12-02' having a base value of £12,000.00 and a valuation of £12,500.00. A '+ New Valuation' button is highlighted with a red box and an arrow pointing to a modal form. The modal form contains fields for Origin (ENGINEER), Date (7/5/2021), Base Value (14000), Mileage +/- (150), Cond. +/- (150), OPTS + (100), OPTS - (empty), and VRN +/- (1200). A 'Valuation' text area is also present. The modal has 'Cancel' and 'Create' buttons, with the 'Create' button highlighted by a red box. The top right of the main form has 'Cancel', 'Save', and 'Save & Next' buttons, with the 'Save & Next' button highlighted by a red box.

★	Source	Date	Base Value	Mileage +/-	Cond. +/-	OPTS +	OPTS -	VRN +/-	Valuation
	GLASSES	2020-12-02	£12,000.00	£200.00	£50.00	£200.00	£0.00	£50.00	£12,500.00

## Managing a Total Loss (Part 3)

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Once you've added all the necessary valuations, you can [edit](#), [delete](#) and/or [select which valuation you have chosen as the final valuation](#):

The screenshot shows a web interface for managing valuations. At the top left is a '+ New Valuation' button. Below it is a table with two rows of valuations. The first row is for 'GLASSES' with a valuation of £12,500.00. The second row is for 'CAP-HPI' with a valuation of £12,075.00. A blue callout box points to the star icon in the second row with the text: 'Click here to select the chosen valuation and click on [Update](#).' Below the table is a form for adding a new valuation, with fields for Source (CAP-HPI), Date (2/12/2020), Base Value (11500.00), Mileage +/- (250.00), Cond. +/- (150.00), OPTS + (100.00), OPTS - (0.00), VRN +/- (75.00), and Valuation (12075.00). At the bottom right of the form are buttons for 'Delete', 'Cancel', and 'Update'. The 'Update' button is highlighted with a red box. A red arrow points from the 'Update' button to the 'Total Loss Management' tab in the bottom navigation bar.

Star	Source	Mileage +/-	Cond. +/-	OPTS +	OPTS -	VRN +/-	Valuation
★	GLASSES	£200.00	£50.00	£200.00	£0.00	£50.00	£12,500.00
★	CAP-HPI	£250.00	£150.00	£100.00	£0.00	£75.00	£12,075.00

Below the table, a form for a new valuation is shown with the following fields:

- Source: CAP-HPI
- Date: 2/12/2020
- Base Value: 11500.00
- Mileage +/-: 250.00
- Cond. +/-: 150.00
- OPTS +: 100.00
- OPTS -: 0.00
- VRN +/-: 75.00
- Valuation: 12075.00

Buttons: Delete, Cancel, Update (highlighted with a red box).

Once you've selected your final valuation, click on "[Save and Next](#)" to go to the "[Total Loss Management](#)" area:

The screenshot shows the bottom navigation bar of the application. It has two tabs: 'Valuation' (which is currently selected) and 'Total Loss Management' (which is highlighted with a red box). To the right of the tabs are three buttons: 'Cancel', 'Save', and 'Save & Next' (which is highlighted with a red box). A red arrow points from the 'Save & Next' button to the 'Total Loss Management' tab.

Navigation tabs: Valuation, Total Loss Management (highlighted with a red box).

Buttons: Cancel, Save, Save & Next (highlighted with a red box).

# Managing a Total Loss (Part 4)

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Go to the **"Total Loss Management"** section to fill/in all the details regarding the final **Eng. Salvage Value**, the **Salvage Ref.**, **Salvage Category**, **AQP Id.**, **Salvage Agent**, whether the **Value was Agreed with Owner**, the **Agreed Value**, **Agreed Date**, whether the **Owner Retains Salvage**, the **Cost to Owner**, whether it's a **New for Old**, any **Recovery/Storage Charges** and any **Settlement Comments**. Click on **Save & Close**:

MARK HAMILTON | AUDI A1 | TRAINING00011 Claim Id: 1381

Previous Save Save & Close

☐ Valuation

☒ **Total Loss Management**

Claim Number

TRAINING00011

Repair Costs

11470.38

Salvage Category

N - Non-Structural Dama...

Salvage Agent

AB SALVAGE

Value Agreed with Owner

Yes

No

Owner Retains Salvage

Yes

No

Recovery Charge

150

Settlement Comments

ANY SETTLEMENT COMENTS HERE

Type of Damage

PAV

13190

Eng. Salvage Value

250

Salvage Ref.

253/20

Agreed Value

12000

Cost To Owner

Storage Charge/Day

15

New For Old

Yes

No

Eng. Valuation

AQP ID

1d1367/20

Agreed Date

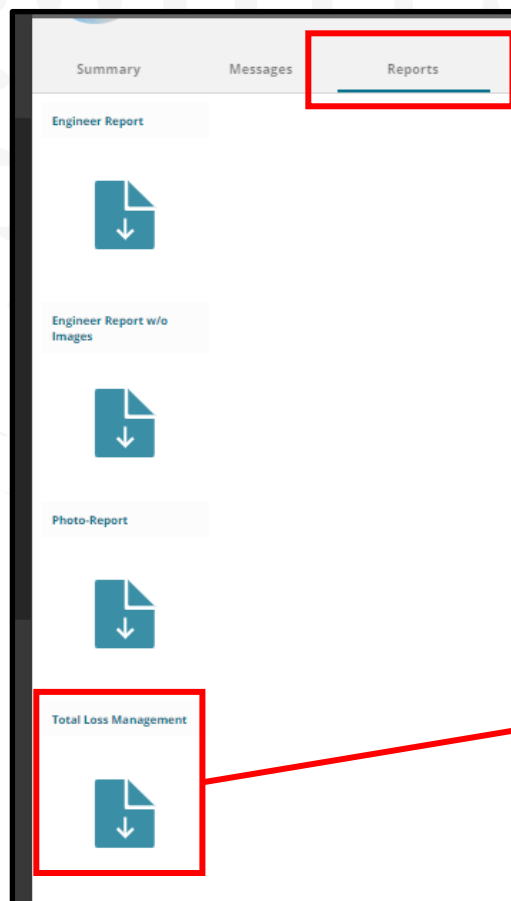
2/12/2020

x

Total Storage Charge

45

When a Job is declared a **Total Loss** and the **Valuation** is complete, you can see the **"Total Loss Management Report"** in the **"Reports"** Tab of the Job:



The screenshot shows the 'Total Loss Management' report window. It contains the following sections:

### Valuation

Accident Date 16/11/2020	Make AUDI	Model A1
Wileage 45000	Registration Number	Registration Date 22/03/2019

### Valuations List

Source	Date	Base Value	Wileage +/-	Cond. +/-	VRS +/-	OPTS +	OPTS -	Valuation
GLASSSES	02/12/2020	£12,000.00	£200.00	£80.00	£80.00	£200.00	£0.00	£12,300.00
CAP-HP1	02/12/2020	£11,800.00	£280.00	£180.00	£78.00	£100.00	£0.00	£12,078.00

### Valuation Comments

### Total Loss Management

Claim Number TRAINING00011	Type of Damage	Repair Costs £11,470.38
PAV £13,190.00	Eng. Salvage Value £250.00	Eng. Valuation £12,075.00
Salvage Ref. 253/20	Salvage Category Non-Structural Damage	ADP ID 1d1367/20
Value Agreed with Owner Yes	Agreed Value £12,000.00	Agreed Date 02/12/2020
Owner Retains Salvage No	Cost To Owner	New For Old Yes
Recovery Charge £150.00	Storage Charge/Day £15.00	Total Storage Charge £45.00
Salvage Agent AB SALVAGE		

### Policyholder

Full Name
-----------



# GT Global

## Other Useful Functions

# Viewing the Photos Whilst Reviewing the Estimate

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When reviewing the [GT Estimate Report](#) click on **"Show Images"** to be able to view the photos simultaneously with the report. You can also do the same from within [GT Estimate](#):

The screenshot displays the GT Estimate interface. On the left, a sidebar contains navigation options: Instructions, Estimates, Active, In Progress, Authorised, Total Loss, Cancelled, and All. The main area shows a large photo of a dark blue car (IMG\_2292.jpg) with a sidebar of controls: Rotate Left, Rotate Right, Zoom In, and Zoom Out. A text box points to these controls, stating: "Use these icons to zoom-in and out and rotate." Below the photo, a table lists details: Source (VinDecoder), Market Value (£7,320.00), and Equipment (Manual). On the right, a panel shows the estimate version (0.1) and total (£616.84). Below this, a table lists operations with their descriptions and costs. Two red arrows point from the "Show Images" buttons in the top right and bottom right of the estimate panel to the photo viewer.

Source	VinDecoder
Market Value	£7,320.00
Equipment	Manual

OPERATIONS		
Painting	Bonnet - Damage Level Surface - Paint Method Removed part ** (Paint-T2) 55227952 (1.20h * £33.00/h)	£39.60
Replace	Front left wing mounting kit ** (Mechanics-T2) 500898625 £11.69 + (0h * £33.00/h)	£11.69
Replace	Left front wing *** (Panel-T2) 5G08 21105A £450.00 + (0.20h * £33.00/h)	£456.60
Painting	Left front wing - Damage Level New Part - Paint Method Mounted part ** (Paint-T2) 50556100	£19.80



# The Activity Log

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In the **Activity Log** tab you can see the complete history of the Claim with all the steps that have been taken, including dates, times, amounts, etc...:

The screenshot displays the 'Activity Log' tab for a claim. The left panel shows the 'Estimate Information' for 'PAUL SMITH', an 'AUDI A1 (GB) SPORTBACK (18-)' vehicle, and the 'Training Repairer'. The right panel shows a timeline of events for 'Wednesday, 14/07/2021'.

**Estimate Information:**

- Policyholder:** Insured PAUL SMITH, Address [redacted]
- Vehicle:** Vehicle AUDI A1 (GB) SPORTBACK (18-), Registration Number [redacted], Delivery [redacted]

**Activity Log Timeline:**

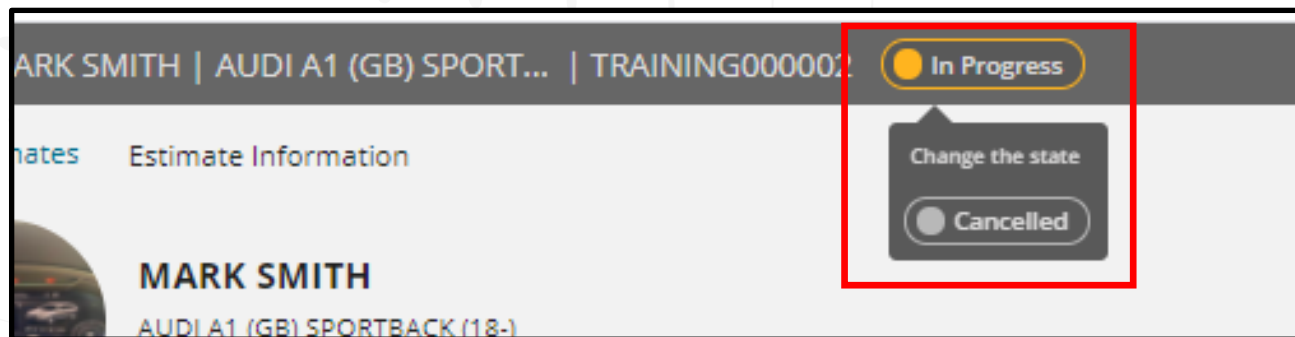
- 04:11 PM:** Claim Status **Completed**  
Company: GT Motive Insurance, Claim Number: TRAINING0000001, Work Provider: WP005
- 04:11 PM:** Estimate Status **Authorised** **£1,442.02**  
Version: 0, Family Number: 0, Gross Total: £1,442.02  
Status: Authorised, Engineering Company: GT Motive Insurance, Managed By: Training Engineer  
Substatus: -, Reason for rejection: -
- 04:09 PM:** Audit Rules **Rules Passed**  
Version: 0.2, Family Number: 0, Compliance: Rules Passed
- 04:09 PM:** Estimate Calculation **v.0.2 £1,442.02**  
Version: 0.2, Family Number: 0, Gross Total: £1,442.02  
Estimator: Training Engineer, Engineering Company: GT Motive Insurance, Managed By: Training Engineer
- 04:09 PM:** Estimate Status **In Progress** **v.0.1 £1,552.42**

# Cancelling a Job

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Under some circumstances the you **may require you to “cancel” a Job**, that is to say, that a job requires no further action in GT Global.

You can do this **marking changing the status of the job** in the upper area of the job management screen to **“Cancelled”**:





Thank You



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